
What to Expect When Upgrading to 12.3 (Q1 2023)

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Overview

Upgrades to Sugar 12.3 are available or required for instances according to the following guidelines:

- All instances hosted on Sugar's cloud service will be upgraded to 12.3 (Q1 2023).

When preparing for your upgrade, please keep in mind that there are some key features of 12.2 (Q4 2022) that have changed or no longer available in Sugar 12.3.x. Some of the items that are unavailable in Sugar 12.3.x may be made available in a future release. To help provide you with the necessary information, this article covers what to expect when your instance is upgraded from 12.2.x to 12.3.x.

For information regarding new functionality available in 12.3.x, please refer to the release notes specific to your CRM solution licenses (e.g., Sugar Serve):

- [Sugar Sell 12.3 Release Notes](#)
- [Sugar Serve 12.3 Release Notes](#)

Feature Disparity Between 12.2.x and 12.3.x

12.2.x (Q4 2022) features in the following categories have changed or are no longer available in 12.3.x (Q4 2022):

- [Administration](#)
- [Focus Drawer](#)
- [Navigation Bar](#)
- [Opportunities](#)
- [Sugar Automate](#)
- [User Interface](#)

Please refer to the sections below for further information on the changes.

Administration

The following 12.2.x Administration behaviors have changed in 12.3.x:

Feature	Sugar 12.2 Behavior	Sugar 12.3 Behavior
Hard deleting records in	Hard deleting records	Hard deleting

the Data Archiver module	such as notes, documents, and emails will not remove any file attachments associated to the records.	records such as notes, documents, and emails will also remove any file attachments associated to the records.
Module Names and Icons	Click "Rename Modules" on the admin screen to update the names of modules.	Click "Modules Names and Icons" on the admin screen to update the names and icons of modules. Module icons can be displayed by graphics or elemental letters and the background color can be changed.

Focus Drawer

The following 12.2.x Focus drawer behaviors have changed in 12.3.x:

Feature	Sugar 12.2 Behavior	Sugar 12.3 Behavior
Focus drawer links	Clicking a link in a focus drawer takes you out of the focus drawer and to the record view.	Clicking a link in a focus drawer opens a focus tab within the drawer for tabbed browsing. This allows you to view the full record view and subpanels without leaving the drawer.
Focus icon	Clicking a Focus icon in a focus drawer dashboard opens another record in place; there are breadcrumbs at the top to follow your progress.	Clicking any Focus icon in a focus drawer opens a tab containing the new focus dashboard, so you may view more information without leaving the drawer.
Renewals and Service Console links	Links in the Overview tab of the Service and Renewals consoles open a new record view, as any other link would.	Links in the Overview tab open a focus drawer, so you do not need to leave the console to view further record details.

Navigation Bar

The following 12.2.x Navigation Bar behaviors have changed in 12.3.x:

Feature	Sugar 12.2 Behavior	Sugar 12.3 Behavior
New navigation bar	Sugar's navigation bar is contained within the header, at the top of the page.	The navigation bar and Quick Create menu have moved to the left side of the page.
Refreshed header	Sugar's header contains the navigation bar, search bar, Notification indicator, user menu, and Quick Create menu.	Sugar's updated header features the search bar front and center.
Navigation bar collapsed	The navigation bar displays full module names within Sugar's header.	The navigation bar displays the top four modules, represented by icons, when collapsed and the full list of available modules with full module names when the navigation bar is opened.
Refreshed module icons	Modules are represented by elemental letters (e.g., "Ac" for Accounts).	Sugar's icon library is updated, and modules are now represented by icons displayed in the navigation bar and throughout Sugar.
Additional vertical screen space	Sugar's footer contains the logo, SugarLive button, link to the mobile web application, Doc Merge widget, shortcuts link, and help icon.	The SugarLive button, Doc Merge widget, and Help link have moved to the bottom of the new navigation bar. The shortcuts and mobile links have moved into the user menu. The logo has moved to the left of the header.

To get a glimpse of some of the navigation bar changes, please see the screenshots in the [Navigation Bar](#) section below.

Opportunities

The following 12.2.x Opportunities behavior has changed in 12.3.x:

Feature	Sugar 12.2 Behavior	Sugar 12.3 Behavior

Opportunities' Best and Worst fields	The Best and Worst fields appear in the Opportunities' layouts (e.g., Record View, Preview View) by default.	The Best and Worst fields have been removed from the Opportunities' default layouts in Admin > Studio but can be added back to the layout, if desired.
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Sugar Automate

The following 12.2.x Sugar Automate behaviors have changed in 12.3.x:

Feature	Sugar 12.2 Behavior	Sugar 12.3 Behavior
Sugar Automate built into Sugar	Sugar Automate is a plug-in that requires a separate module loadable package to install and use the product.	Customers who use Sugar Automate will no longer need to maintain a module loadable package because the functionality has been built into Sugar's code base and can be enabled via license key.
Not Applicable task status	The Not Applicable status in the Tasks module is only added if the Sugar Automate package is installed in the instance.	The Not Applicable status in the Tasks module is available out of the box whether the Sugar instance has a Sugar Automate license or not.
License Management	Licenses are managed via Admin> Sugar Automate > "License & Validation".	Sugar Automate licenses are managed alongside others either in Admin > SugarCloud Settings or Admin > User Management.
Configuration	"Configure Display Settings" and "Configure Modules" are two separate options under Admin > Sugar Automate."	The "Configure Display Settings" option has been merged into the "Configure Modules" page, and the single configuration page now shows both the "Configure Modules" and "Configure Display Settings" sections.
Custom Modules	Admins must download and install a package to enable custom modules	Custom modules are available in the Configure Modules page.

	for Sugar Automate.	
Preview	A Preview icon is shown on each Smart Guide activity and is an available option in the Activity Actions menu.	Preview is an available option in the Activity Actions menu.
Icons and colors	Sugar Automate colors and icons have a style slightly different from Sugar.	Sugar Automate colors and icons are refreshed to be consistent with the rest of Sugar.

User Interface

The following 12.2.x User Interface behaviors have changed in 12.3.x:

Feature	Sugar 12.2 Behavior	Sugar 12.3 Behavior
Sugar tour	Users can launch the Welcome to Sugar tour by clicking the Tour This Page link in the Help pane.	The Sugar tour option is no longer available as the Tour This Page link has been removed from the Help pane.
User profile time zone	Users need to set the time zone in their user preferences based on their current geographical location.	The user's time zone in Sugar is automatically updated to match the browser's time zone. The Time Zone setting in user preferences is read-only and can no longer be edited.

Notable Visual Differences Between 12.2.x and 12.3.x

The following section displays screenshots and brief explanations detailing some of the notable visual differences between Sugar 12.2.x and 12.3.x.

Navigation Bar

In Sugar 12.2.x all module tabs, links, menus, etc are contained in both the header and footer, as shown in the following screenshot.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ Documents ▾ ⋮ Search 🔍 🔔 👤 +

Renewals Console ☆

Overview Accounts Opportunities

Planned Activities

Today Future

10+ Meetings **2** Calls

- Follow-up on proposal
Sally Bronsen, in 19 hours
- Review needs

More meetings...

Active Tasks

8 Due Now **10+** Upcoming 0 To Do

- Send local user group information
Sally Bronsen, in 19 days
- Ship product

More tasks...

Pipeline

Select... ▾

- Negotiation/Review
- Id. Decision Makers
- Value Proposition
- Qualification
- Prospecting

Stage	Value	Count
Qualification	\$915	1
Value Proposition	\$741	1
Id. Decision Makers	\$527	1
Negotiation/Review	\$3,596	3
Prospecting	\$8,364	3

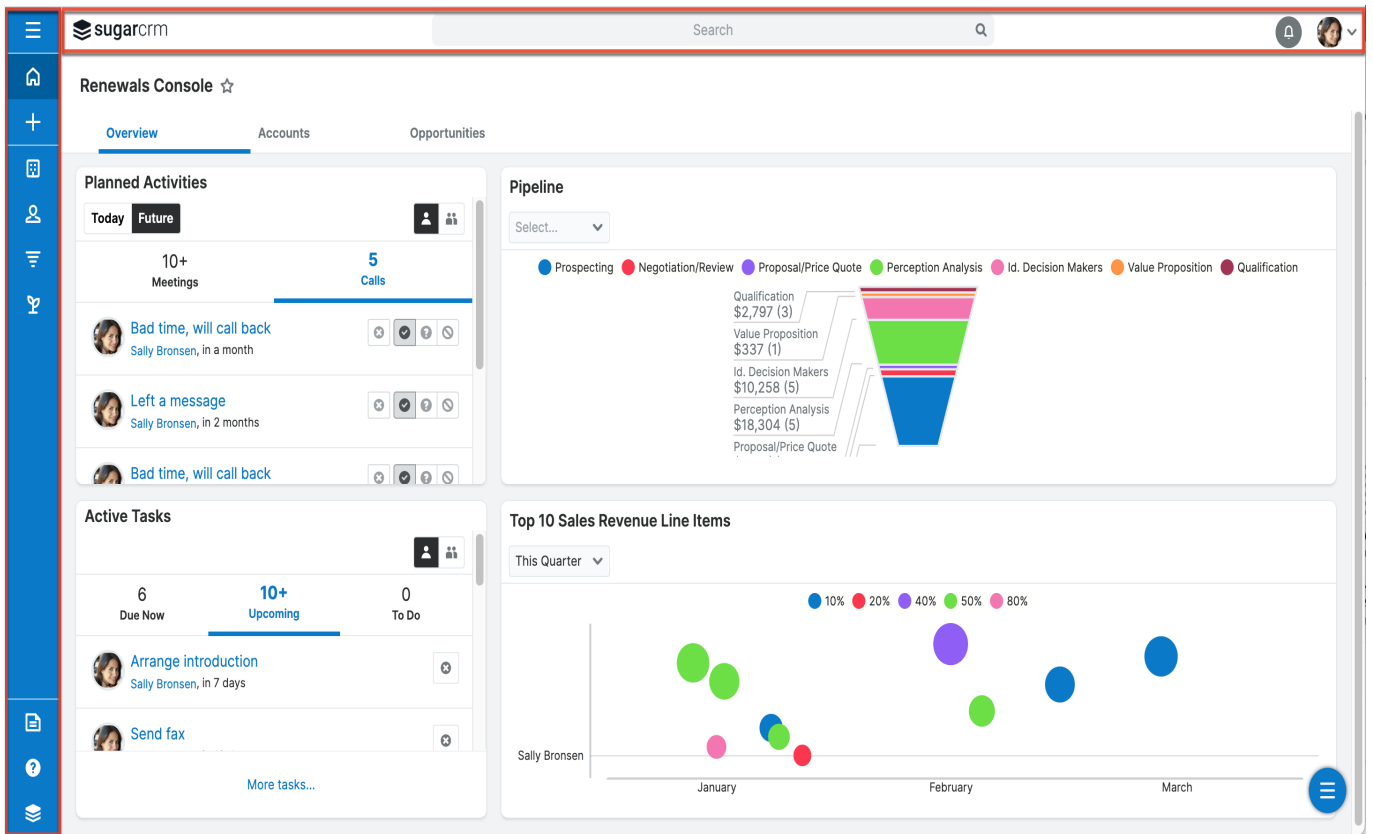
Top 10 Sales Revenue Line Items

This Quarter ▾

Sally Bronsen

January February March

In Sugar 12.3, all module tabs, links, menus, etc are now contained in a new and modern navigation bar on the left side of the screen and a refreshed header, as shown in the following screenshot.



The following table provides a side-by-side comparison of important changes from 12.2.x to 12.3.x:

Feature	Sugar 12.2 Behavior	Sugar 12.3 Behavior
Module tab menu		
Additional modules		

The image shows a CRM interface with two main components highlighted by red boxes:

- Left Panel:** A dropdown menu for 'Calls' is open, showing a list of options: Meetings, Tasks, Escalations, Notes, Forecasts, Cases, Product Catalog, Targets, Target Lists, Tags, Process Definitions, and Processes. A red box highlights the three-dot menu icon at the top of this list.
- Right Panel:** A navigation sidebar is visible, containing a search bar and a list of navigation items: Home, Quick Create, Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, and Documents. A red box highlights the hamburger menu icon at the top of this sidebar.

In the background, a chart is partially visible with the following data points:

- Value
- Prospecting \$8,364 (3)