Sugar Developer Webinar - Q3 2020 (10.1.0)

Michael Shaheen

Developer Advocate

Matt Marum

Director, ISV Alliances

June 23 & 24, 2020



Speaker Bios



Michael Shaheen - Developer Advocate

- 20+ year full stack developer
- 6 years as an instructor
- Certified Scrum Master
- With Sugar since April 1, 2019

- 2 Teenage Daughters
- 2 house cats, one neighborhood cat
- Love baking
- Hometown: Pittsburgh, PA, USA



Matt Marum - Director, ISV Alliances

- Developer, Solution Architect, PM
- With Sugar since August, 2012
- Wife, Twin boys, and a Goldendoodle
- All at home in Raleigh, NC

Agenda

- New Modules
- Module Loader Improvements
- Record Dashlet Configuration
- Admin Updates
- Other Updates
- Q&A



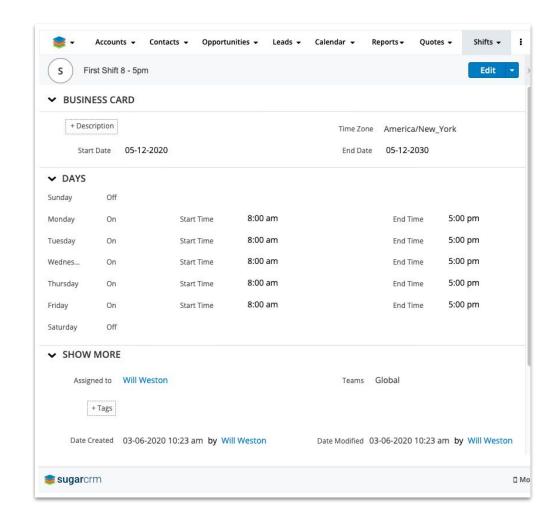
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New Modules

New Shifts Module

Shifts

- Available in Sell, Serve, Ent
- To manage work shifts (Morning shift, late shift,etc)
- Manager can create/edit/delete Shifts
- Manager can set/edit Shift Timezone
 - Timezone defaults to user's time zone
 - Timezone is mandatory
- Manager can assign employees to shifts
- Has Users subpanel

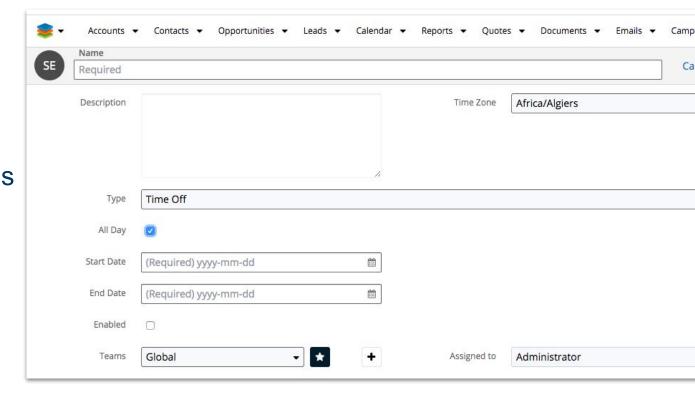




New Shift Exceptions Module

Shift Exceptions

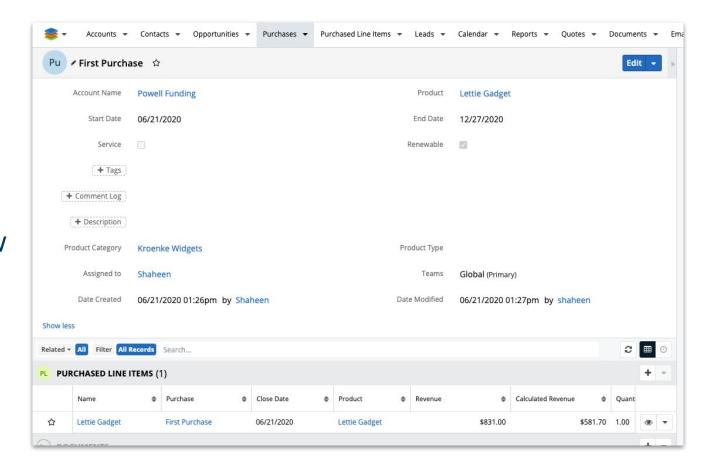
- Available in Sell, Serve, Ent
- Specify unavailability of an Employee during shifts
- Users assigned to the Shift Exceptions are excluded from round-robin assignment of the records for the duration of the exception
- Accessed only via Shifts module
- Has Users subpanel





New Purchases Module

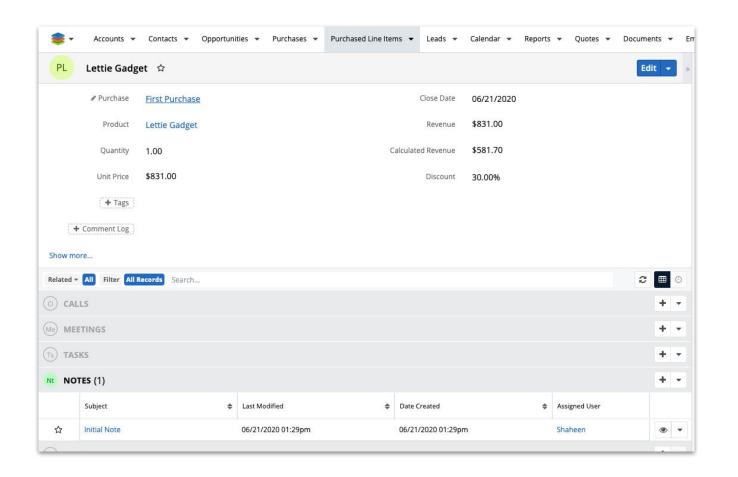
- Purchases
 - Available in Sell, Serve
 - NOT available in Ent, Pro, Ult
 - Contains details of what a customer has bought, including service items and non-service items
- The Active Subscriptions Dashlet now based on Purchases (instead of opportunities)
 - if using Active Subs dashlet, upgrade will blank it out
 - once admin marks desired RLIs and the generation job completes, dashlet should appear normal





New Purchased Line Items Module

- Purchased Line Items
 - Available in Sell, Serve
 - NOT available in Ent, Pro, Ult
 - Required Fields
 - Name
 - Related Purchase
 - Revenue
 - Unit Price





Updates

Module Loader Improvements

- Package upload time has increased by 59%
 - All package checks have been moved to upload step
 - So, upload endpoint could be used as healthcheck
- Staged packages list is decreased by 47.9%!
- Installed package list is decreased by 22%
- Install package time decreased by 10%
- Uninstall package time decreased by 5%
- API no longer ignores uninstallable flag
- Uninstall API endpoint now respects remove_tables flag
- When a module is uninstalled, any workflows it was based on will be deleted

Better API error handling



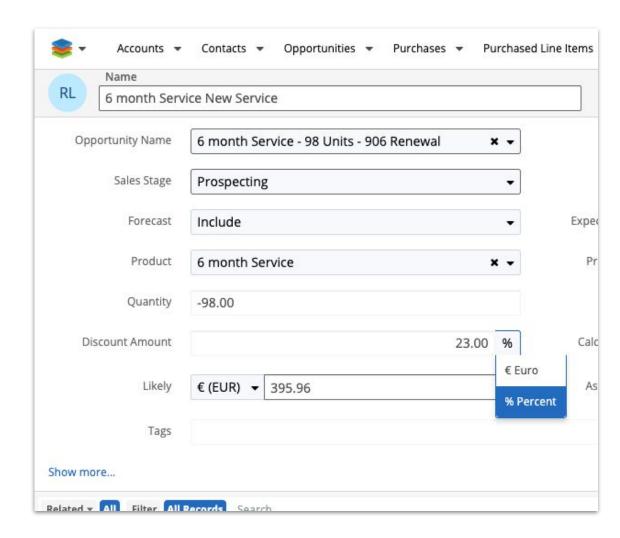
New Sugar Sell Fields

- In Opportunities module
 - Service Start Date
 - service_start_date
- In Revenue Line Items module
 - Generated Purchased Line Item
 - purchasedlineitem
 - Generate Purchase
 - generate_purchase



RLI updates

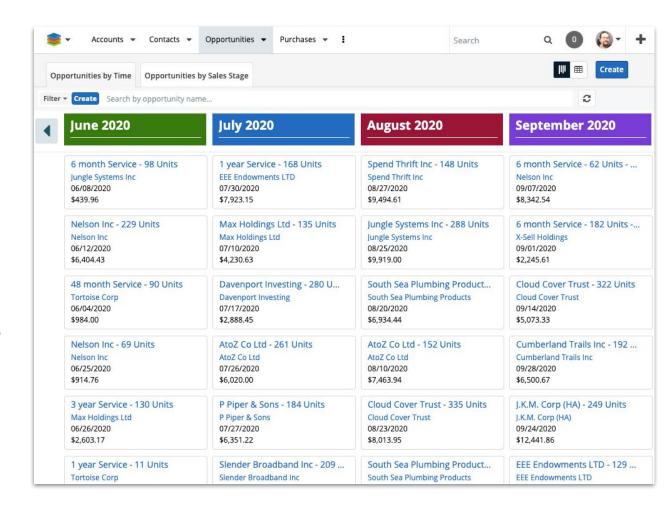
- Discounts in RLIs by percentage
 - In Sell, Ent, Ult with RLIs enabled
 - Users can switch between amount and percentage values
- Label for "Calculated Revenue Line Item Amount" changed to "Calculated Amount"
- Label for "Revenue Line Item" changed to simply "Name"
- Quoted Line Items and Revenue Line Items now accept negative value for Quantity





Tile View Changes

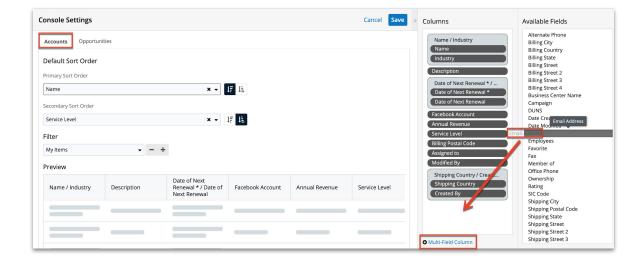
- When switching between Tile view tabs or between List view and Tile view, applied filters will be sticky
- Drag/drop is prevented on read only fields in Tile view
- Refresh button added to Tile view
 - reapplies filters after changes are made
 - just like refresh on list view





Record Dashlet Config

- Record dashlet can be enabled and configured for any Sidecar modules (including custom)
- Record dashlet layout is inherited from Record view layout by default
- Multi-line List view is configurable
- Drag and drop between columns is supported



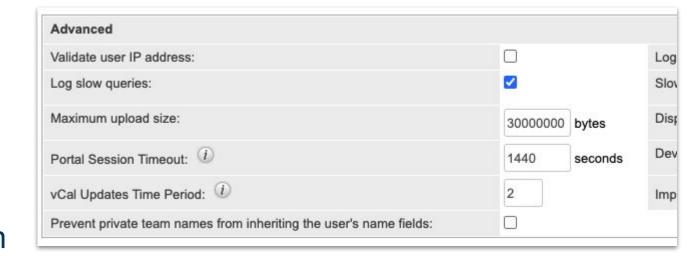
Updates to Admin

- If using Sugar Identity, Admins can (once again) copy/delete existing Employees when there is no real user associated
- Sugar Connect Admin section has been removed. Its options are now in System section
- ALL system-generated e-mail templates are now editable in the Emails Module
 - Not just "Forgot Password" and "System-generated password"
 - Assignment Notification
 - Meeting Invite
 - Call Invite
 - Scheduled Reports
 - These will most likely override your previous customizations
- Fields available to configure in Studio will be based on the admin user's assigned license type
 - So, for example, a Sugar Ent user will not have access to Business Center fields



Validate user IP address

- "Validate user IP address" is now DISABLED by default
- When enabled, has caused problems with Sugar Integrate, Discover, and 3rd party apps
- Current value will not change upon upgrade
- Can be disabled in System Settings



User Interface

- User-defined column widths in list view and sub-panels will be preserved
 - even after browser window resize
 - even after closing/opening intelligence pane
 - sub-panel widths between records of same type will be preserved (so all cases sub-panels but not between Contacts and Cases for example)
- URLs in text areas will be converted to hyperlinks
 - temporary regex substitution
 - only for display (not modifying your actual data)
- When a user is mentioned in a comment log, an e-mail will be sent to the user



Sugar Cloud Regions

Sugar Product	SugarCloud region						
	US: Oregon	US: Virginia	Canada	EU: Ireland	EU: Frankfurt	UK: London	AU: Sydney
Sugar Market		✓		✓			
Sugar Sell	✓		✓	✓	✓	Mid-July	✓
Sugar Serve	✓		✓	✓	✓	Mid-July	✓
Sugar Discover	✓						
Sugar Connect	✓						
Sugar Integrate	✓			✓			✓

Refreshed Developer Exam

- Certified Sugar Developer Specialist exam is being updated
- Last update was ~5 years ago
 - removed some outdated questions
 - added new questions on Module Loader API, SugarCloud, Job Queue, etc
 - Live in SugarU by mid August
- You still have until mid August to take existing exam
- Other certification exams are being updated also



https://university.sugarcrm.com/



Sugar Integrate Updates

- Now available in Sydney (AU) SugarCloud region
- CRM Data Migrator for Sales v1.0
 - Compatible with Sell, Enterprise
 - Supports: SFDC
- Opportunity to Cash Template v1.0
 - Compatible with Sell, Enterprise
 - Supports: Quickbooks



Sugar Upgrade Reminders

SugarCloud upgrades

- 7 day notice prior to upgrade
- Can be extended to 30 days after release
- Customers can request a scheduled upgrade

Sugar 8.0.x End-of-Life

- Security only support began October 30, 2019
- End of life is October 30, 2020
- Support consists of 18 months of full maintenance and security support followed by 6 months of security-only support for a total of 24 months of support

https://support.sugarcrm.com/Resources/Sugar_Cloud_Policy_Guide/#Upgrade_Policy_

https://support.sugarcrm.com/Resources/Supported Versions/#End-of-Life Plan

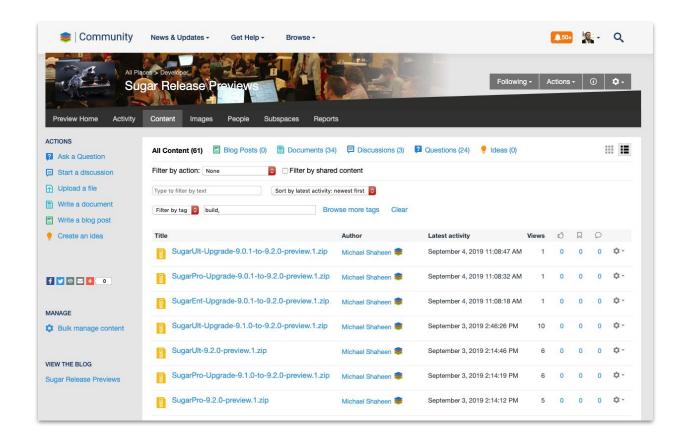


Sugar Release Previews

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Sugar Release Previews

- We offer preview builds prior to each release
- Usually 2 drops
- Great for testing out how your customizations will work with the upgrade
- Helps us with testing
- We'd like to offer it more widely
 - So let us know if you'd like to participate
 - <u>developers@sugarcrm.com</u>



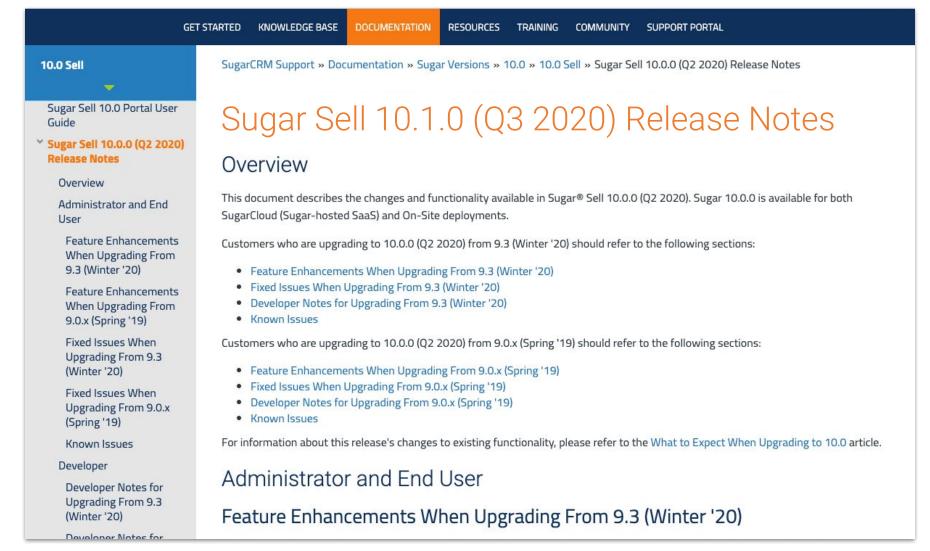


Additional Development Resources

25

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Sugar 10.1 (Q3 2020) Developer Release Notes





Sugar 10.1 (Q3 2020) Unit Tests

Sugar Unit Test Repository (unit-tests)

Please read the Test Tools License Terms before using. These terms are located in LICENSE within this repository

These unit tests contain both server side (PHP) and client side (JavaScript) test suites. PHP unit tests are implemented in PHPUnit. JavaScript tests are implemented using Jasmine.

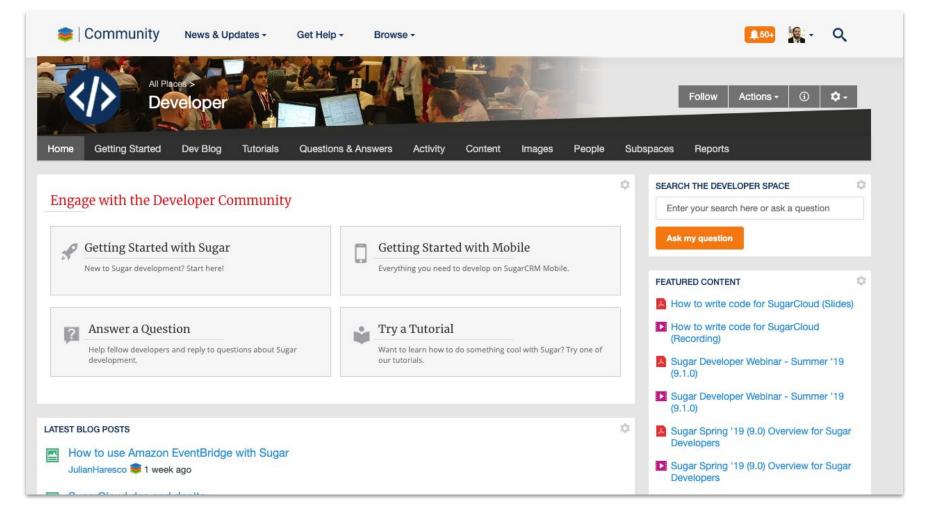
Check out the branch on this repository that matches the version of Sugar that you are using. The specific steps to run the tests may vary from Sugar version to Sugar version as we adopt new test technology and expand on the framework.

Repository Structure

The test suites are separated into different branches based upon Sugar version. Check out the branch for the version of Sugar you are using.



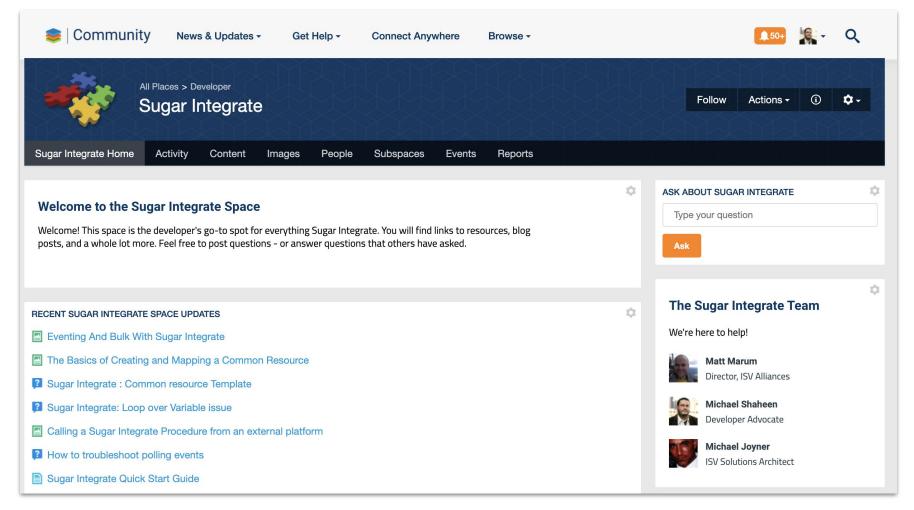
Sugar Developer Community



https://community.sugarcrm.com/docs/DOC-4842-on-boarding-new-sugar-developers



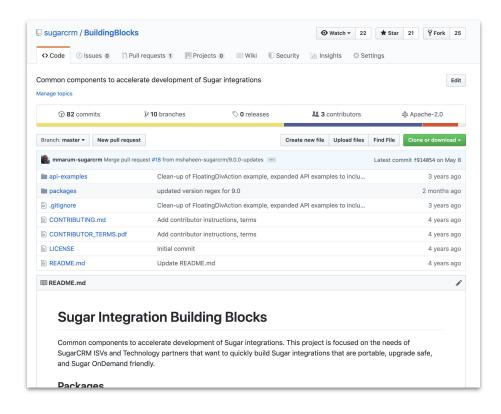
Sugar Integrate Community



https://community.sugarcrm.com/community/developer/sugar-integrate



Open-Source Repos



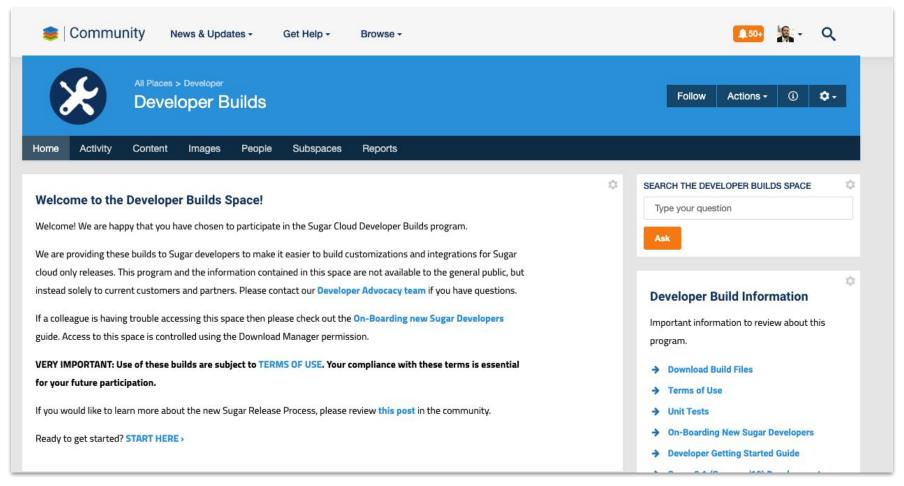


Building Blocks - https://github.com/sugarcrm/BuildingBlocks
Professor M - https://github.com/sugarcrm/school

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Developer Builds

- https://community.sugarcrm.com/community/developer/developer-builds
- Sugar 10.1/Q3 2020 build coming soon!



Questions?