

SugarCRM: Sixty Second Sugar Snippets

Podcast Script: Upgrades

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Welcome to this sixty second Sugar Snippet. My name is Susie Williams. Today we're going to talk about what happens when you upgrade your Sugar software. We'll talk about how to find out when patches and upgrades are available, what to do when you need to upgrade, and why upgrading is a great "best practice".

SugarCRM, like all great pieces of software, is an evolving story. We're constantly adding new features and fixing product defects. We provide what's known as "patches" and "upgrades" to the software that contain these enhancements and fixes; patches generally are smaller and contain a set of fixes to the software, while upgrades tend to have larger amounts of code and often contain new features. Patches come out several times a year, while upgrades typically happen at most only once or twice a year.

So how do you know when it's time to apply a patch? If you're the administrator, when you log in you'll see a red warning banner across the top of the admin page telling you there is a new version of Sugar that's available. What you'll need to do is to go to the [Downloads area](#) of SugarForge.org if you're a community edition user, or to the Download Purchased Software area of the [Support Portal](#) if you're a Pro or Enterprise customer. Select the latest patch or upgrade, then download it to a local hard disk.

As a best practice, you should back up your database and instance prior to starting any upgrade of the system. After you do that, click on the Upgrade Wizard in the System area of the Admin page and follow the prompts on the screen. First you'll be asked to upload the upgrade package, then the wizard will perform the upgrade. You'll get messages along the way that tell you what the wizard is doing, and whether you need to merge any custom files afterwards. You'll typically only need to worry about merging files if you have performed customizations that are not "upgrade safe", like making changes to the core Sugar files.

If you're a Sugar OnDemand customer, patches and upgrades are taken care of for you automatically by our OnDemand administrators. They'll apply the patches and upgrades to your Sugar instance, letting you know when they have completed the work.

Oh, and as to why upgrading is a great "best practice"? Well, as with any software product, you want to stay current as much as possible to take advantage of any bug fixes or new features that have been developed. You also need to remain current as software companies only support the most recent versions of the software. If you avoid this housekeeping chore, you'll find yourself with an even bigger task of upgrading later on. Upgrades are like dusting your shelves every week; miss a few weeks and the dust bunnies won't hop away, they'll only get bigger.

And that's your sixty second Sugar snippet. Goodbye!

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