



SugarCloud Migration Guide

Your migration to SugarCloud is a journey where SugarCRM helps migrate your current Professional or Enterprise installation into our fully managed SugarCloud environment. We designed this process to ensure minimal downtime and a superior user experience from Discovery through Go-Live!





Your Migration Team



You, the Customer



Your Developers, your Partner, and/or Sugar CX Services

To address incompatibilities & customizations.



Sugar Customer Success Team

Your guide to making the right decision and ensuring your needs are met from licensing through to resourcing.



SugarCloud Support

To upgrade your environment to the latest quarterly release and then import your environment safely and securely into SugarCloud.

Considerations

Upgrades

Cloud Support can accept any supported version of SugarCRM. Prior to import, we will upgrade your instance to the latest cloud version to ensure a smooth and successful migration.

Customizations

Some code-level customizations or 3rd-party integrations may need to be refactored to align with our [Module Loader Guidelines](#) so they can perform the way you expect in SugarCloud. Learn more from these guides:

- [SugarCloud Policy Guide](#)
- [SugarCRM v11 Developer Guide](#)

Migration Timeline Overview

This timeline is based on the experiences of many of our customers who have already migrated to SugarCloud. Your current version of Sugar Professional or Enterprise, number of customizations, and amount of data may impact your specific migration timeline. Your Migration Team will work with you to create the optimal timeline specifically for your organization.

Pre-Migration Activities

- Discovery / Scoping
- *Milestone: SOW and other docs signed*
- *Milestone: Project kickoff meeting held*

Week 1

- Prepare environment for cloud migration
- Initial Import of test Instance into staging
- Remedy incompatibilities
- Import of test Instance into SugarCloud
- *Milestone: Test instance successfully imported into SugarCloud*

Week 2+

- Developer, Partner, and/or CX Services remediation of customizations & signoff
- *Milestone: SugarCloud test instance ready for customer testing*

Week 3+

- Client UAT of cloud sandbox
- Customer testing & sign-off for Go-Live
- Final test import & sign-off for Go-Live
- *Milestone: Sign-off from Customer, Devs, & Cloud Support for Go-Live*

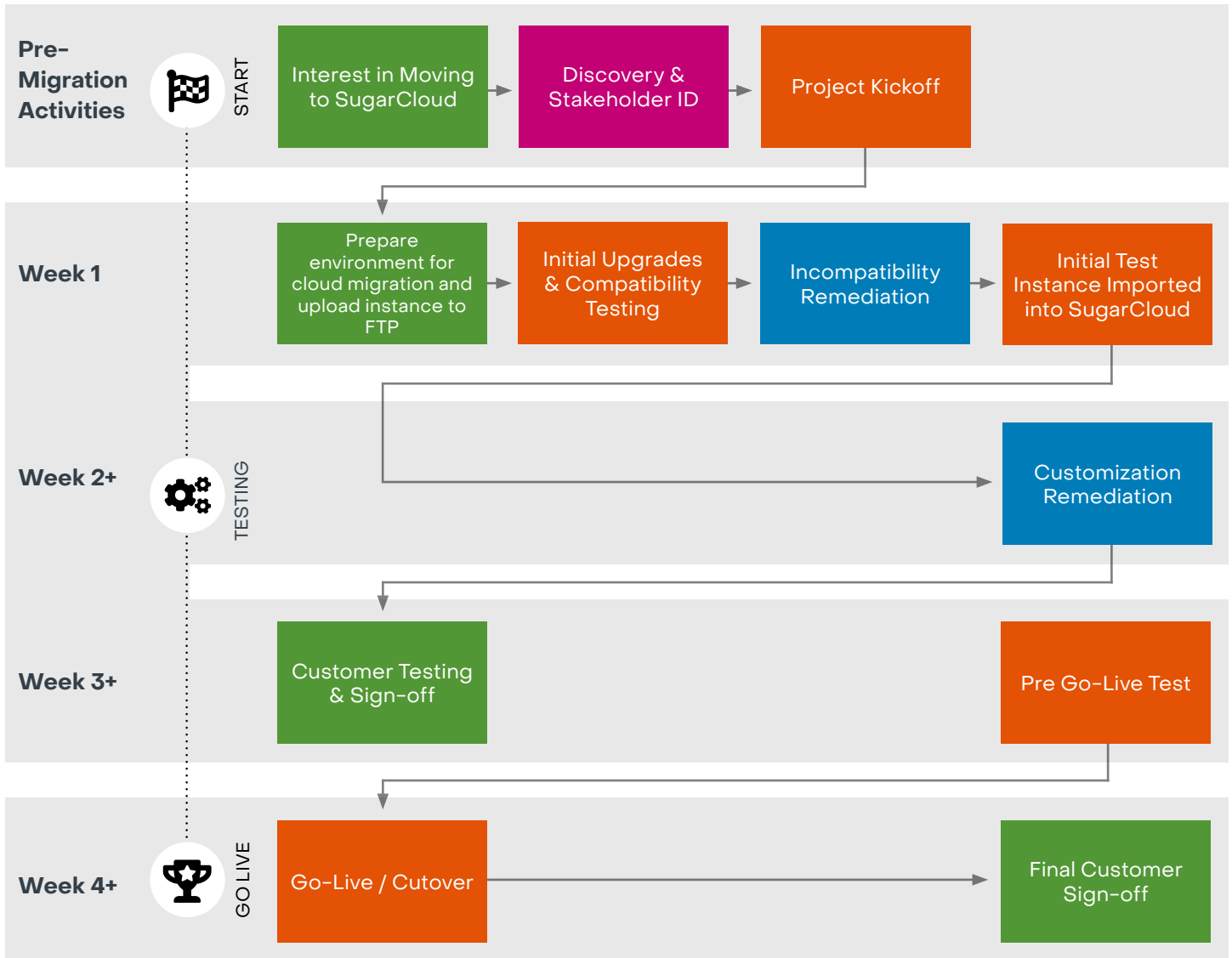
Week 4+

- Pre Go-Live Planning
- Go-Live Import to SugarCloud
- Customer Acceptance and Sign-Off
- *Milestone: Customer Final Sign-off*

Migrations to SugarCloud require coordination between:

Customers, Sugar Customer Success, Developers, Partners, or CX Services, and Cloud Support.

Timeline



About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit www.sugarcrm.com or follow @SugarCRM.