

No.	Category	Item	Description
1	User Interface	Edit on List/ Detail View	Users will be able to edit fields from the list and detail views.
2	User Interface	New Email Client	Replace existing SuiteCRM email client with a quicker and more functional alternative.
3	User Interface	New WYSIWYG	Replace current TinyMCE WYSIWYG editor with a more functional alternative.
4	User Interface	Responsive Theme	Adapt current theme to adapt to the viewing environment.
5	User Interface	Colour Coding on List View	Ability to set colour coded list views based on criteria set within the admin panel for each module.
6	User Interface	Sub-Folder Email Categorisation	Users will be able to categorise their emails into sub-folders.
7	User Interface	Remove Empty Sub-Panels From View But Keep Create Button	If a sub-panel is empty, all that should show on the detail view are the create and select buttons for that module.
8	Marketing	Campaigns (Mailchimp standard)	Improve current campaign offering to bring in line with competitors standards such as Mailchimp. Main focus on graphical template design.
9	Marketing	Ability to Save Web-to-Lead Html	When a user creates a web-to-lead form they will have the ability to save the html to SuiteCRM to reuse at a later date.
11	Marketing	Customer Feedback	Create a standard module to record customer feedback.
12	Marketing	Dynamic Target List Building	The ability to link AOR reports to target lists so that if new entities are included in the report they are automatically added to the target list.
13	Sales	Sales, Targets & Forecasts	The ability to set sales users targets which can then be reported on.
14	Sales	Product Sales	When a quote has been accepted, the products associated to the quote should be associated to the account specified in the quote.

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15	Sales	Minimum Pricing on Quotes	Users will set a minimum sale price for products and users will not be able to quote below that price.
16	Sales	Product Bundles	Associate products into bundles so that when the bundle is added to the quote all products in that bundle are added.
17	Sales	Quote Version	Users will be able to save different versions of a quote and be able to view previous versions of a current quote.
18	Sales	Volume Based Discounts	Users will define discounts for products based on the quantity quoted. For example, 1-9 at £10 per unit, 10-19 at £7 per unit etc.
19	Sales	Drag & Drop Functionality for AOS	Ability to drag and drop line items on the quotes, invoices and contracts edit views.
20	Sales	Partial Payment of Invoices	Users will define if an invoice has been partially paid and how much has already been paid.
21	Sales	Price Book Per Customer	Set up price list which specify different product prices for different accounts. When a product is added to a quote it will use the price from the price list for that account if one has been defined.
22	Project Management	Project Management Tools	Improve current project management offering in line with competitors standards. To include milestones, Gantt chart and critical paths.
23	Project Management	Holiday Planner / Calendar	Ability to specify users who are going on holiday and manage from a calendar interface.
24	Project Management	Project Templates	Users will define project templates which they can create new projects from.
25	Project Management	Convert Project to Opportunity	Users will convert opportunities to projects.
26	Studio	Image Fields	Add image to the standard field types in studio.
27	Studio	Calculated Fields	Ability to specify field calculations from studio.
28	Studio	Import Drop Down Lists	Users will import drop down list values from a CSV file.

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29	Studio	Smart Handling of Certain Fields	Validation on fields above such as postcode finder, postcode validation, country drop down.
30	Studio	B2C Configuration	Admin users will be able to edit the convert lead layout from studio. They will also be able to set the account relationships to non required.
31	Studio	Automatic ID Generation for Customer Numbers	Users will set within studio a format for an automatic generating number field type.
32	Homepage	Homepage Manager	Admin users will set default homepage layouts for different roles in different groups. When a user is assigned a role/ group, their homepage will automatically default to the set homepage.
33	Homepage	Activity Stream Configuration	Ability to set additional modules to appear in the activity stream.
34	Homepage	Create Record from Dashlet	Users will create new records from dashlets on the homepage.
35	Resource Management	Resource Management	Users will define resources which can be allocated using a resource calendar. Users will have the ability to add resources to meetings using the scheduling bar.
36	Reporting	Multiple Related Modules	Multi-level module selection and conditions for AOR.
37	Reporting	Charts	Ability to display report results in a graphical format.
38	Reporting	Dashlet Reports / Charts	Users will be able to add reports/charts to their homepage.
39	Reporting	Scheduled Reporting	Ability to set date and time for reports to generate and output to a defined location to include emailing to set recipients.
40	Reporting	Run Time Report Conditions	Ability to edit conditions whilst viewing report results.
41	Reporting	Grouping	Ability to group conditions together to allow for and/or logical groups.

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42	Roles and Security Groups	Field Level Access	Admin users will be able to define which roles can edit which fields on the edit view of a record.
43	Roles and Security Groups	Separate Edit and Create Rights	For each role, you will be able to define edit rights and creation rights separately.
44	Integration	Alternative CMS plug-ins and Deeper Integration	Integrate CRM with a new CMS. Extend current integration to include events, quotations and document exchange.
45	Integration	Payment Integration with Portal for Invoices	Integrate portal with a payment gateway so that customers can pay invoices. Invoices which have been paid will be recorded in the CRM.
46	PDF and Email Templates	PDF Template & Email Trees / Families	Ability to group PDF templates and email templates into a hierarchical structure.
47	PDF and Email Templates	Edit PDF Before Print	Users will be able to edit the merged text of a PDF template before outputting the PDF document.
48	PDF and Email Templates	Modifiers & Rules for Text / Merged Fields for PDF	Ability to add conditions to PDF templates.
49	PDF and Email Templates	More Sample Email Templates & PDF Templates	Include more samples of email and PDF templates with standard SuiteCRM download.
50	Searching	Favourites	Ability to bookmark records for easy retrieval at a later date.
51	Searching	Record Subscriptions & Integration with Activity Stream	Users will subscribe to records and therefore be notified if any change has been made to that record. To include email notification and notification via activity stream.
52	Searching	Search Modifiers "And", "Or" and "Not"	Ability to search records using "And, "Or" and "Not" logical operators.
53	Searching	Tag Accounts / Contacts / Leads	Ability to tag records with descriptors which are searchable.
54	Searching	Deploy Global Saved Searches	Ability to define global saved searches so that they can be used by all users.

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55	Searching	Better Tools to Hand De-duplication	Real-time duplication searching and fuzzy search results.
56	Searching	PDF Templates for Contracts	Add PDF template to contracts module.
57	Searching	Search for Emptiness	Users will be able to search for empty values.
59	System Admin	Password Rule Settings and Protection Mechanism Against Brute Force Attacks	Admin users will be able to set rules for password creation such as case rules, symbol/number inclusion and attempt limits.
60	System Admin	Control Over Individual Sub-Panels and Rights to Hide Relationships	Ability to remove standard sub-panels from view per module using studio.
61	System Admin	More Language Packs	Add a new language pack.
62	System Admin	Standard Module Loader Visibility	Make SecuritySuite, AOP, AOS, JJW Google Maps Visible in Module Loader
63	Mass Update	Open Data in Excel	Export, modify & save data back into the CRM to save changes.
64	Mass Update	Mass Update 'Create Portal User' functionality	Ability to mass assign contacts as portal users.
65	Workflow	Workflow Emails 'From' Assigned / Created User	Users will define if workflow emails should be sent from the systems, assigned to users or created by users email credentials.
66	Integration	Office 365 & Exchange Capabilities	Provide email integration with Office 365 or Microsoft exchange server.
67	Integration	Google Integration	Provide a bi-directional Google integration with email, calendar and Google drive.
70	Integration	Mailchimp Integration	Provide an integration between SuiteCRM campaigns and Mailchimp.
71	Integration	Hubspot Integration	Provide an integration between SuiteCRM campaigns and Hubspot.

No.	Category	Item	Description
73	Developer	Fields Metadata	Studio Changes to be Sorted in Custom Vardefs not Database
76	Developer	JQuery for Front End Ajax Javascript User Interface from Yahoo YUI	Replace all instances of YUI with JQuery equivalent.
78	Developer	Pre-Installation Validation Tools	Add more validation checks on install to make installation easier.
79	Developer	PostgreSQL Support	Support PostgreSQL as DB Back-end
80	Activity Planning	Contact Frequency Ability	Set per account a minimum contact frequency if an activity is not set within the contact frequency, the assigned user will be notified.
81	Activity Planning	Add Task from Calendar View	Users will add tasks from the calendar in a similar to calls and meetings.
83	Activity Planning	Threaded Tasks / Broadcast Task Updates	Threaded tasks similar to SuiteCRM case functionality and ability to notify users on task updates.
84	Activity Planning	Call Snooze Functionality	When a call reminder pops up, users will be able to hit a snooze button which will hide the pop-up and reschedule the reminder for a defined period of time.
85	Social Media	RSS Fields on Accounts, Contacts & Leads	Users will be able to add RSS feeds which will display in sub-panels under the entities.
86	Social Media	Social Suggestions	Create Targets / Leads based on having similar social profiles to Contacts who bought a product / has an opportunity.
87	Activity Planning	Ajax pop-up on scheduling bar	When a user mouses over a meeting/call schedule bar and that user is already scheduled, a pop-up will display the conflict details.
88	Events	Opt-out status	Do not send emails to opted out invitees
89	Events	Contacts Invitation status subpanel	Add subpanel to contacts page with invitation status
90	Events	Event Search	Add search filter in events form
91	Events	Contact/Lead email	Remove saving emails with contacts or leads

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92	Events	Closed Events	Add a closed field (subscriptions are closed and accept entry point has no effect)
93	Events	Optimisation	Optimisations (like fetch email template only once and not for each invitee)
94	Events	Attendance sheet.	Attendance sheet reports
95	Project Management	Resource Management	Create resources and add to project tasks
96	Project Management	Gantt Charts	View project gantt charts with relationships
97	Project Management	Project task relationships	Build relationships such as start-to-start and start-to-finish between project tasks
98	Project Management	Resource Management	Resource loading charts
99	Project Management	Project Templates	Duplicate entire projects including tasks and resources
100	Project Management	Project resource holidays	Show when resources are unavailable