Questions and Answers

from the **#AskMeAnything** Event, June 2021

1. Is there any plan to enhance the user interface of SuiteCRM?

There are plans to continue to evolve the SuiteCRM 8 user interface through the lifecycle of the product. We will continue to gather feedback throughout the beta schedule and then ongoing to iterate on the user interface.

2. If we were to start on a customized version of SuiteCRM now, would it make sense to start with 8 beta, or 7.11 then upgrade when 8 production is out?

I would not recommend starting on the SuiteCRM 8 beta release as there is potential for changes.

3. What are the best resources for learning how to build your own modules for SuiteCRM? The SalesAgility training sessions for $200 each are 3+ years old.

We do plan to update the webinars once SuiteCRM 8 has been released but will not be updating for SuiteCRM 7. The master classes are only one training offering and we can put together bespoke training packages if you are looking for that service.

4. Do we have any plan to come up with mobile app for SuiteCRM?

SalesAgility doesn't have any immediate plans to release a mobile app and until we do there are some great 3rd party apps over on the SuiteCRM store – for example: https://store. suitecrm.com/addons/quickcrm.

5. Are there any plans to further enhance the User Interface of SuiteCRM 8 past what is currently seen in the beta version?

There are plans to continue to evolve the SuiteCRM 8 user interface through the lifecycle of the product. We will continue to gather feedback throughout the beta schedule and then ongoing to iterate on the user interface.

6. When will there be a SuiteCRM Developer Guide?

There's developer guide documentation available for SuiteCRM v7.x.x. We will be making some updates to the developer guide prior to the SuiteCRM v8 release and will be ongoing post-release. The documentation is also a community project so we hope the SuiteCRM community will contribute to this documentation.

7. Does SuiteCRM have any future plan to move to the Cloud like SugarCRM or will SuiteCRM still stick with Community?

There are no plans to make SuiteCRM a Software as a Service only product or change the Open Source license. We believe that flexibility is key and therefore will continue to offer both on-premise and SaaS solutions.

8. Any plan to drastically improve SuiteCRM Themes? Many customers dislike the current themes and themes are important in order to sell the software.

There aren't any immediate plans to change the themes. Although, a theme builder feature planned on the SuiteCRM 8 roadmap but will not be in the initial release. In the meantime, SalesAgility can build themes and implement these for our clients, which we do on a regular basis.

9. What is the plan for migrating from SuiteCRM 7x to SuiteCRM 8x?

We'll be providing an upgrade path nearer the time to the production release. We'll also be providing supportive materials which will outline any features of SuiteCRM v7 that will no longer be compatible with SuiteCRM v8 although we are aiming to maintain the highest level of backward compatibility possible.

Be sure to register for v8 updates: https://suitecrm.com/suitecrm-8-is-coming/.

10. What about reporting and automation?

Do you mean specifically about improvements to these modules? After the initial release of SuiteCRM 8 we are looking to address key modules UI and features. Both Reporting and Workflow are on this list.

11. Any plan to develop social and chat for SuiteCRM, these feature same with Bitrix24?

There are plans to implement social and chat features in SuiteCRM. These will not be in the original release of SuiteCRM 8 but will be included in the SuiteCRM 8 product lifecycle.

12. Will SuiteCRM support other databases, for example Postgresql?

In SuiteCRM 8 we are moving towards using newer technologies and deprecate more of SuiteCRM 7 this will open up the possibility of supporting PostgreSQL. In the initial release however, it won't be supported.

13. Do you plan to add support for running SuiteCRM in docker?

This is something we would like to release in the near future.

14. Any Plan to develop Chat, Mobile App and New Themes for SuiteCRM?

There are plans to implement social and chat features in SuiteCRM. These will not be in the original release of SuiteCRM 8 but will be included in the SuiteCRM 8 product lifecycle.

SalesAgility doesn't have any immediate plans to release a mobile app and until we do there are some great 3rd party apps over on the SuiteCRM store - for example: https://store. suitecrm.com/addons/quickcrm

There aren't any immediate plans to change the themes. Although, a theme builder feature planned on the SuiteCRM 8 roadmap but will not be in the initial release. In the meantime, SalesAgility can build themes and implement these for our clients, which we do on a regular basis.

15. I'm interested about the future of the community. I'm very surprised to notice that we are so few. What's happened to the community?

We currently have a range of community initiatives in the pipeline. Our Head of Community returns from maternity leave at the end of this month and has lots of plans to foster community engagement. More recently, we have restructured our product development processes which will enable us to manage a community-driven backlog as well as community-driven development projects.

16. SuiteCRM 8, front end enhancements and Angular will change customer perception dramatically in positive way.

a. However, I'm worried about extensive customizations in view classes with producing DOM changes. Will there be hooks allowing modifications on Angular objects using Javascript

b. Angular changes will be SalesAgility task or 3rd party developers will be able to add new objects on-premise installations or with Module loader?

c. We are building a full extension framework for the front end which will allow you to customize the angular objects. You can see some of this in the most recent beta. We aim to release some example extensions shortly. We are also looking to bring in more back-

end configurations the will simplify customisations on the front end for common tasks.

d. 3rd Party developers will be able to use the new extension framework to make these changes which will be accessible through the module loader.

17. Do we have any plan to show some key information of the Record on Top of the Detailview & it's configurable from the Studio?

The key insights in SuiteCRM v8 will not be configurable via the studio in the first instance but will be achievable via backend customisation. There are plans to make this configurable in the studio as part of future releases.

18. Do we have any Plan to having tagMe feature in SuiteCRM by Default? Currently Plugin available in the Market but it's better this feature available in SuiteCRM.

For the initial release of SuiteCRM v8, we have changed the multi-select feature to include "chips" style input and display. It is anticipated that this will be extended in the future to allow tagging.

19. Is it possible to make the Report Configuration process a little simpler? Currently it's difficult for the non-technical person to understand.

We currently have plans to modify the reports module to increase the capabilities as well as enhance the user experience.

20. Customers demand for self-configuring business rules. However, existing workflow module is weak to address their requirements. Are there any plans to enhance it?

In the short term, we are looking to add some features to the existing workflow tool such as OR conditions. In the long-term, we plan to include a full graphical UI for the workflow engine.

21. Are there any plans to update the email template creator? Formatting issues and white space.

Yes, there are plans to update the email template creator. Our team has already investigated and proposed a solution for a substantial update. Originally, we had hoped this would have been included in the initial SuiteCRM 8 release however it now likely to be in a release shortly after.

22. For SMS, needs to give some predefine Gateway. User needs just configure the Details and Start Sending SMS from the SuiteCRM?

For SuiteCRM 8 and beyond we want to build a platform that integrates easily with other services including SMS.

23. Are there any plans for a SuiteCRM to OwnCloud or Nextcloud integration? Are there any plans for a 'document sync' type feature like Google Drive / Dropbox plugins?

We have an initial release for an integration with NextCloud available (https://suitecrm.com/salesagility-and-nextcloud-announce-suitecrm-integration/).

This is an ongoing relationship with NextCloud and we anticipate that more features will come as part of future releases.

Yes, this is a feature that will come in the future as this integration is extended.

24. For Customer Portal Configuration, Needs Proper Document with Details. Till SuiteCRM 7.11.X, there is no proper Document available using which Non-Technical Person can use the Customer Portal.

The documentation is a community project and any community member can contribute to the documentation site.

25. Has the idea of having a functional email system been abandoned? A proper usable email system would be a game-changer.

Definitely hasn't been abandoned. Lots to consider in this space and careful planning that needs to be taken. We understand that there is a lot of feedback in this area which our team is looking to address in subsequent releases.

26. Any plans to facilitate A/B testing?

It's in the backlog but not currently in the roadmap. Hopefully, it will be part of future releases but unlikely in the short term.

27. Will SalesAgility raise its concern about accessibility? I tried to upgrade to latest version 2 months ago to find out accessiblity has been forgotten.

Accessibility is mandatory in many countries and of course is a necessity for many users. If we want SuiteCRM to expand its users base developers should always have this concern in mind.

We have developed a new theme to address accessibility issues which will be released in SuiteCRM 7.12. It is something that we are actively concerned with so please raise any feedback as GitHub issues.

28. Can SuiteCRM also display currencies properly? e.g. 1.000,00 € So, dot for thousand, comma for decimal values, then space and then currency symbol. Out of the box - not that I have to hire a developer to write an "extension" to do this basic job.

Can SuiteCRM also display currencies differently for UK customers and EU customers?

We are currently investigating field-level configurable schematics for SuiteCRM 8 which would include this currency issue and make it more extendable in the future.

Although the specific feature isn't on the SalesAgility roadmap for SuiteCRM 7 there may be merit in approaching the community to develop it.

29. Can you create a place for clients (for end users) to write about features they need? It will be useful for both SalesAgility and community. SuiteCRM will become more in demand and community will be have direction for development.

We have restructured our product development processes which will enable us to manage a community-driven backlog as well as community-driven development projects which will feed into and run parallel to the team at SalesAgility. Our Head of Community returns from maternity leave at the end of this month and will be responsible for facilitating this with the community in the near future.

30. How about email templates and campaings. Will be these modules more suitable for use? Our customers prefer other solutions such as mailchip, because creating email template in SuiteCRM is painful.

Yes, there are plans to update the email template creator. Our team has already investigated and proposed a solution for a substantial update. Originally, we had hoped this would have been included in the initial SuiteCRM 8 release however it now likely to be in a release shortly after.

31. Any plan to utilise Zapier for integrations?

At the moment the SugarCRM 6.5 Zapier integration is compatible with SuiteCRM. As the new API matures with SuiteCRM 8 we will look at having our own Zapier connector.

32. Will it be possible to upload easily emails to History subpanel through api?

You can currently create email records via the API. The history subpanel reads records based on email addresses or specific relationships.

33. I would like to know how easy is the migration from SugarCRM CE 6.5.20 to the new SuiteCRM 8.0?

There will be an upgrade path from SuiteCRM 7 to SuiteCRM 8. You'll need to upgrade to SuiteCRM 7 prior to upgrading to SuiteCRM 8.

The complexity of this migration will be determined by the level of customisations and what type of customisations you have on SugarCRM CE.

34. My users are asking for a more robust search of Accounts. Not sure if this is something I am missing (I am new to SuiteCRM) or if it's already been asked, but are there plans to add a Boolean 'OR' type search? I know how to use the % and _ wildcards, but it would be fantastic if my users could search something like, "where account name like '%test' OR billing zip like '802%'". As I understand it now, the default logic is always 'AND'. Thanks!

And lastly, these questions and answers are great!

This is not currently possible using the module search of SuiteCRM 7 but if you are using our elastic search integration you could achieve conditions via the global search.

For SuiteCRM 8 our plan is to replace the Advance Search with a conditions or rules-based search option similar to workflow conditions or reporting conditions which would have AND / OR lines.

35. I'm your humble user and developer from Mongolia. Using the system since SugarCRM version 3, around 2006. My time zone differs much, probably can't participate the live event. Will you record the event and will you publish?

In future, we will run similar events in different time zones. We will consolidate the questions and answers into a single document and publish to share with the community.