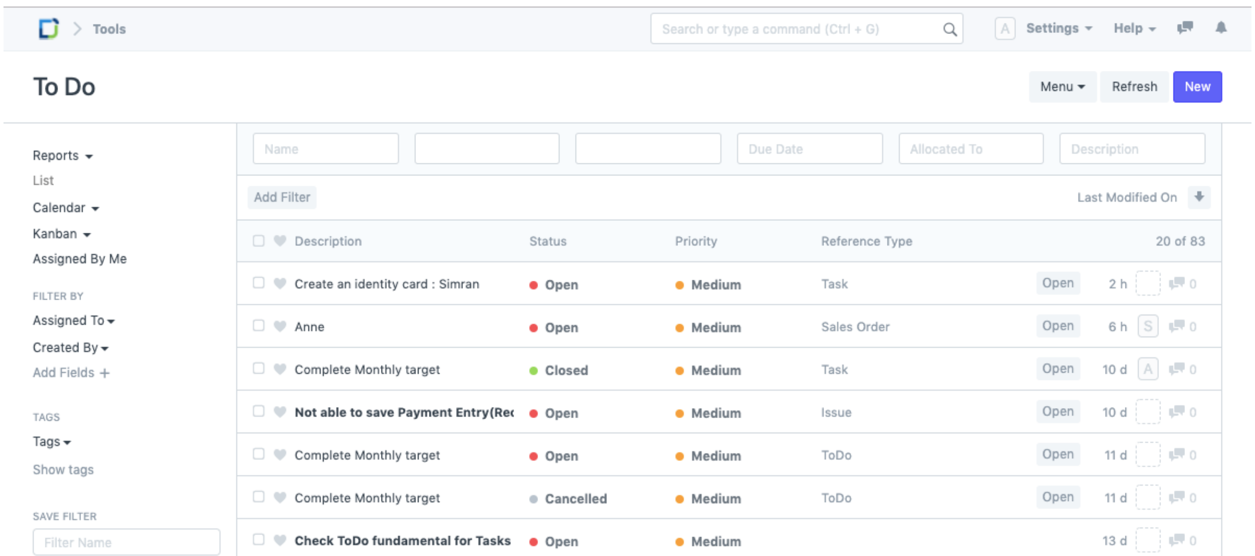
Tools

To Do

ToDo is a list of activities that is to be done by a particular individual.

In DellSuite, a ToDo is a simple tool where you can define the activities to be done. The ToDo List will enlist all the activities assigned to you and by you.



A ToDo also gets auto-created when any other Document is assigned to you. Checkout ToDo Auto Creation

To access ToDo, go to

Home > Tools > ToDo

1. How to create a ToDo

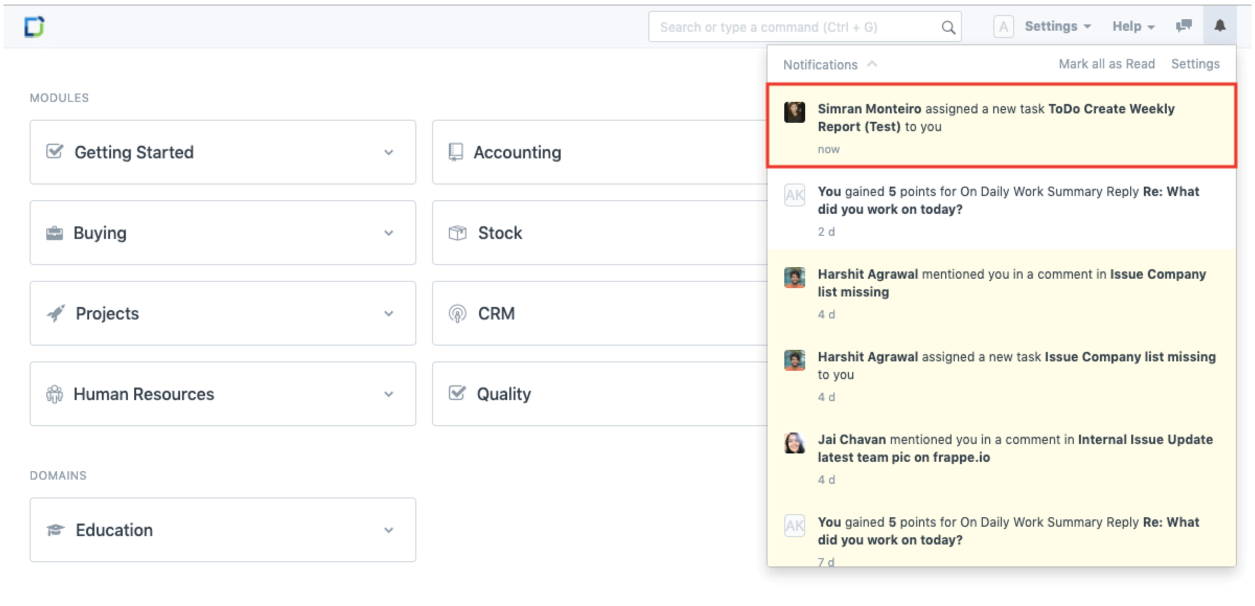
1. Go to the ToDo list, and click new.
2. You will be redirected to a Quick Entry for ToDo, wherein you will be required to enter the description of the ToDo.

3. Save.

Note: While creating a ToDo using the Quick Entry, the ToDo by default gets assigned to the creator. To prevent the same, and assign it to other users, ensure that you edit the ToDo in Full Page.

ToDo Notification

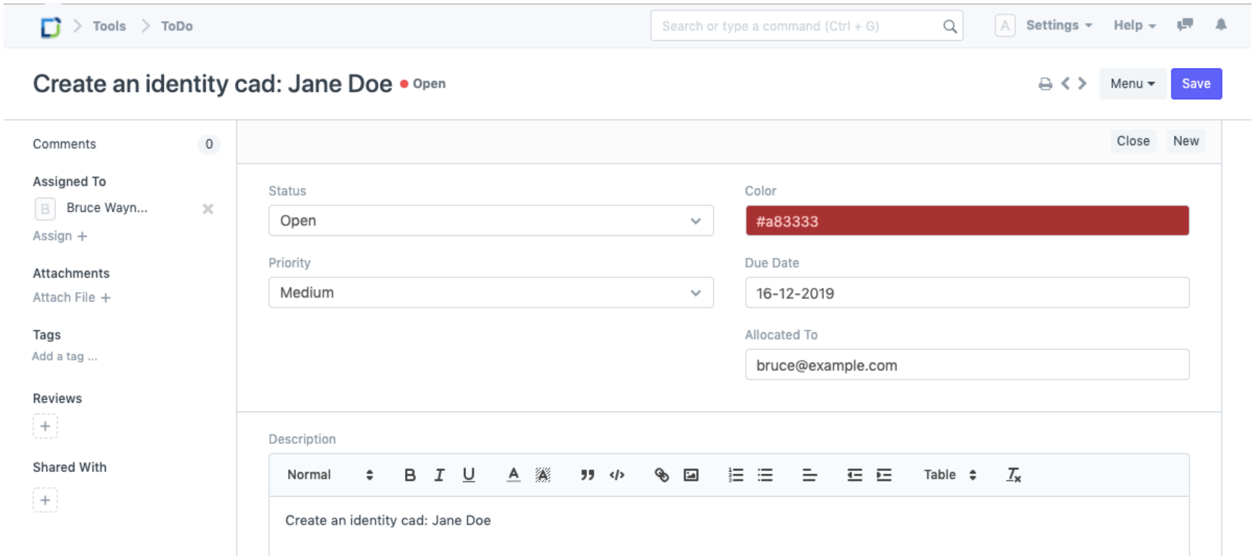
Once a ToDo is created, the assigned user will get a notification for the ToDo.



1.1. Additional Options while creating a ToDo

1. **Status**: You can define the status of the ToDo. While creation, the status of the ToDo would be 'Open' by default. The user can change it to 'Closed' when the assignment is completed.
2. **Priority**: You can define the Priority of this task as Low, Medium or High.
3. **Color**: You can choose to assign a color to each of your ToDos. E.g., a ToDo created as a weekly reminder for sending reports can be assigned the color Purple, whereas all the personal ToDos can be assigned the Color Yellow.
4. **Due Date**: You can add the Due Date to all the ToDos.

5. **Allocated To**: In cases where you are assigning a ToDo to another DellSuite User, you can do so here.

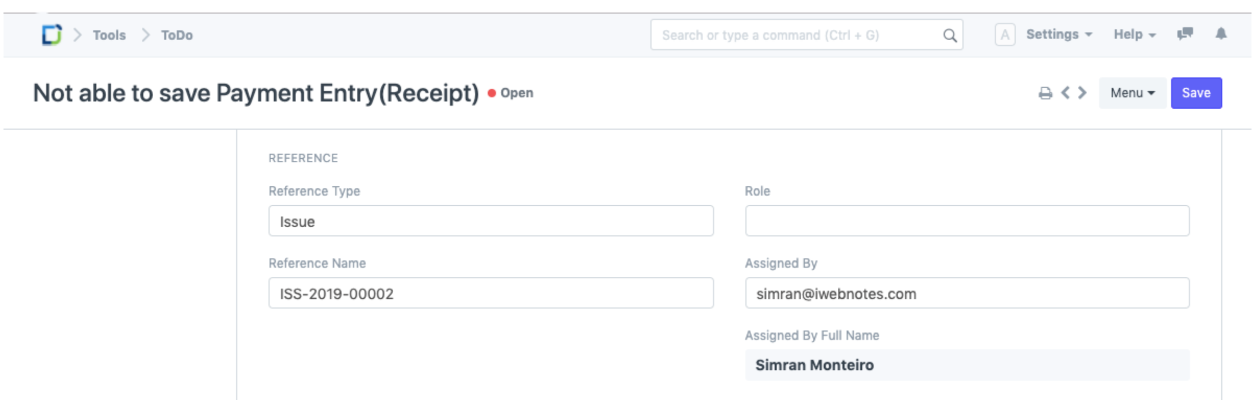


1.2. References

Every Document in DellSuite has an option called 'Assign To' in the side-bar. Using this option, any Dcoument can be assigned to the user. The User would be assigned a ToDo simultaneously.

1. **Reference Type**: When a ToDo is created from another document, say a Task or an Issue, the Reference Document Type gets linked to the ToDo here. You can also choose to add a Reference Document Type manually.
2. **Reference Name**: On assignment via another DocType, the name of the Reference DocType also gets linked over here.

3. **Assignment By**: When you get assigned aa ToDo via another Document Type, the name of the person making the assignment also gets tagged.

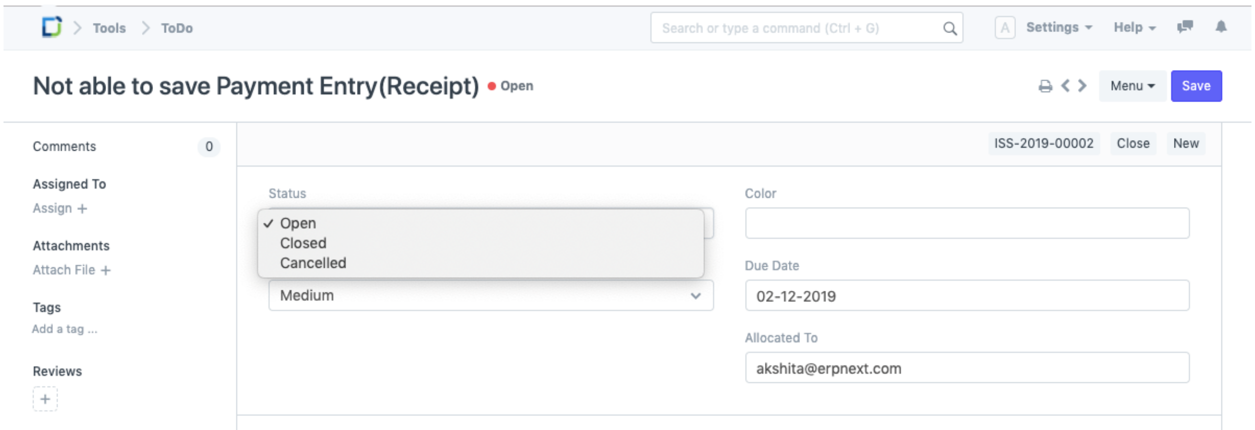


2. ToDo Statuses

ToDo has 3 statuses, each describing the current state of a task.

- **Open**: A ToDo by default is marked Open when it is created.
- **Closed**: When an activity is completed, the ToDo can be marked as 'Closed' or 'Resolved' or 'Completed'. Further, for conditions like Issue Resolved or task Completed; the ToDo gets closed automatically. It can also be Reopened if required.

- **Cancelled**: When a user gets removed from the assignment of a ToDo/Task/Issue, the ToDo linked to that Document automatically gets 'Cancelled'.

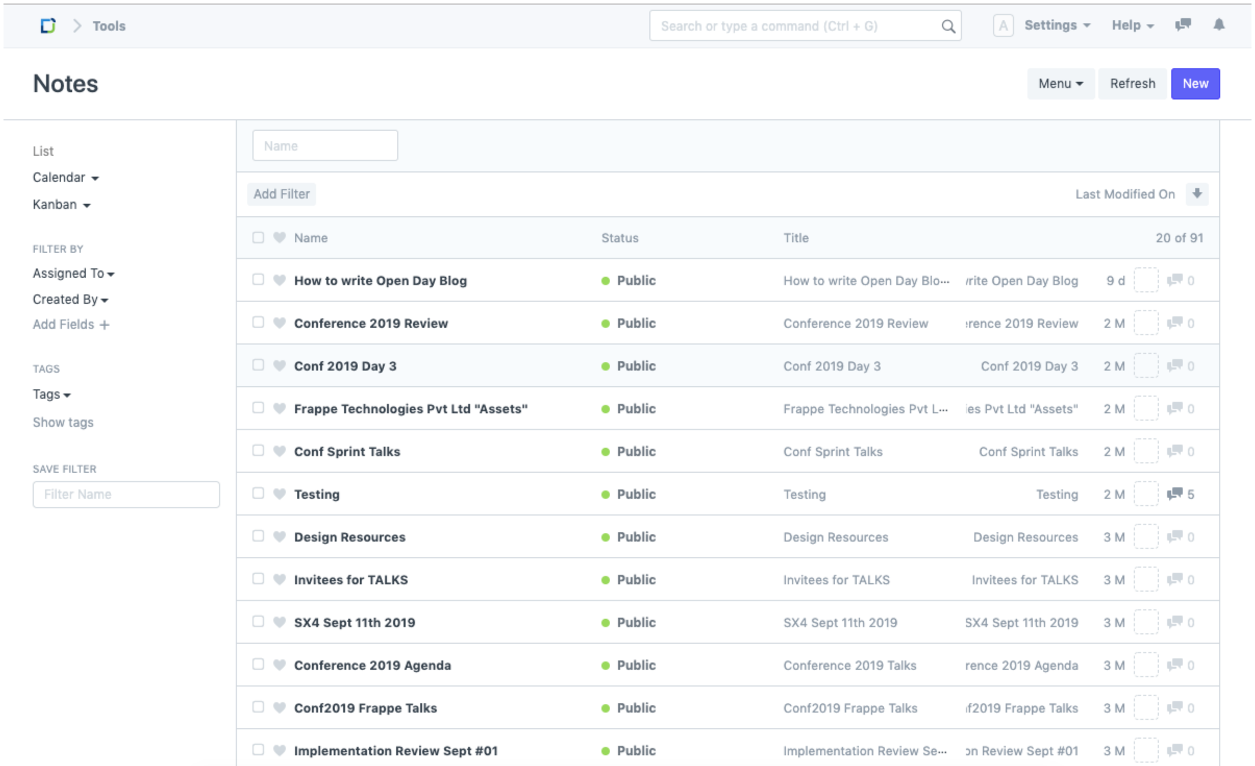


Notes

Notes is a tool that can be used for Personal Note Taking purposes. You can use it to save your lists, frequently used passwords, terms, and conditions, or any other document which needs to be shared or kept for reference.

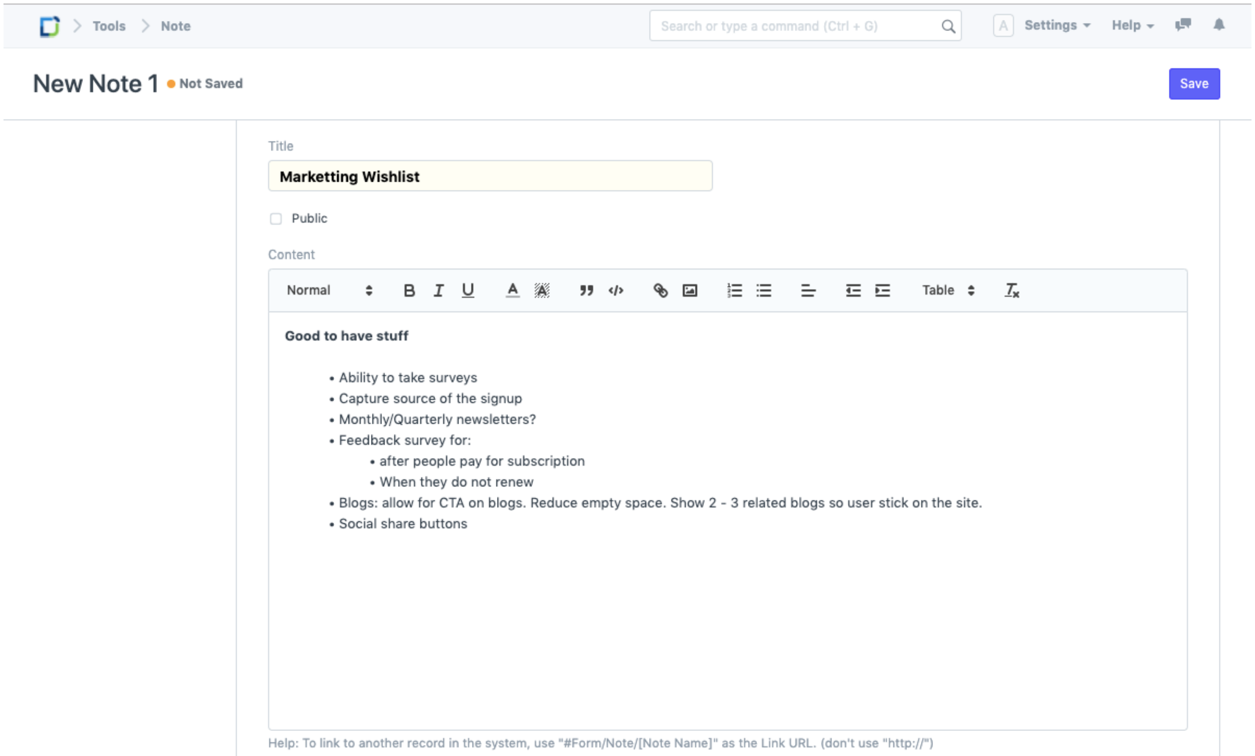
To access Notes, go to:

Home > Tools > Note



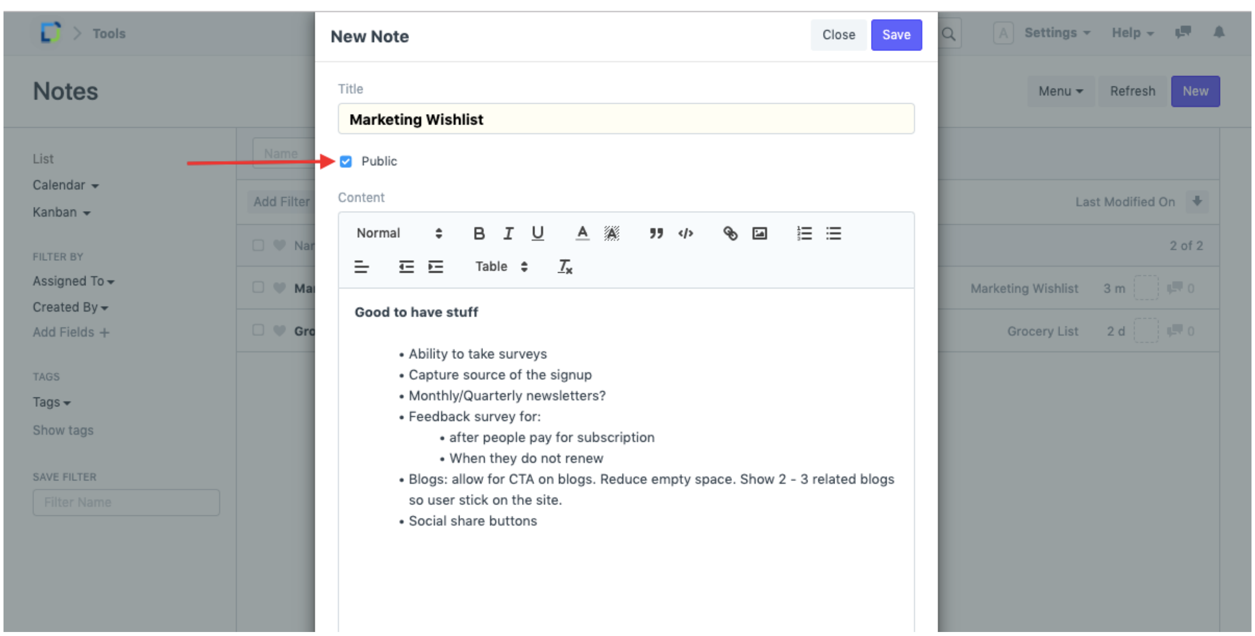
How to create a new Note

1. Go to Note list and click on New.
2. Enter the Title of the Note.
3. Enter the Content of the Note. The content box is a Text Editor box to enable you to format the content as per your requirements.
4. Save.

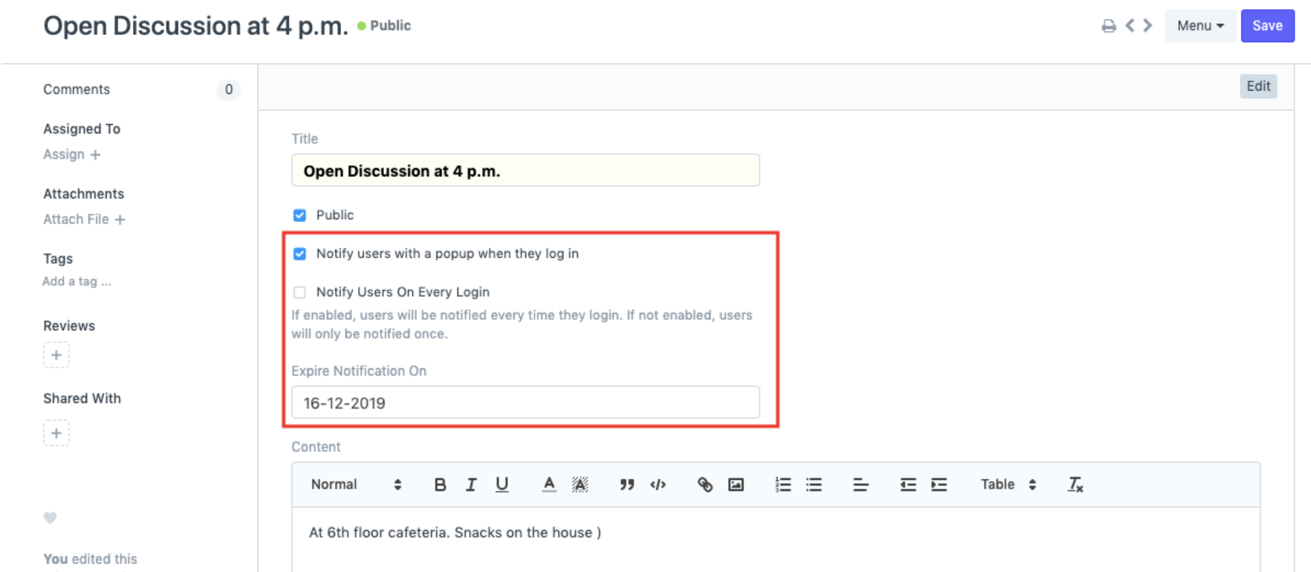


Visibility of Notes

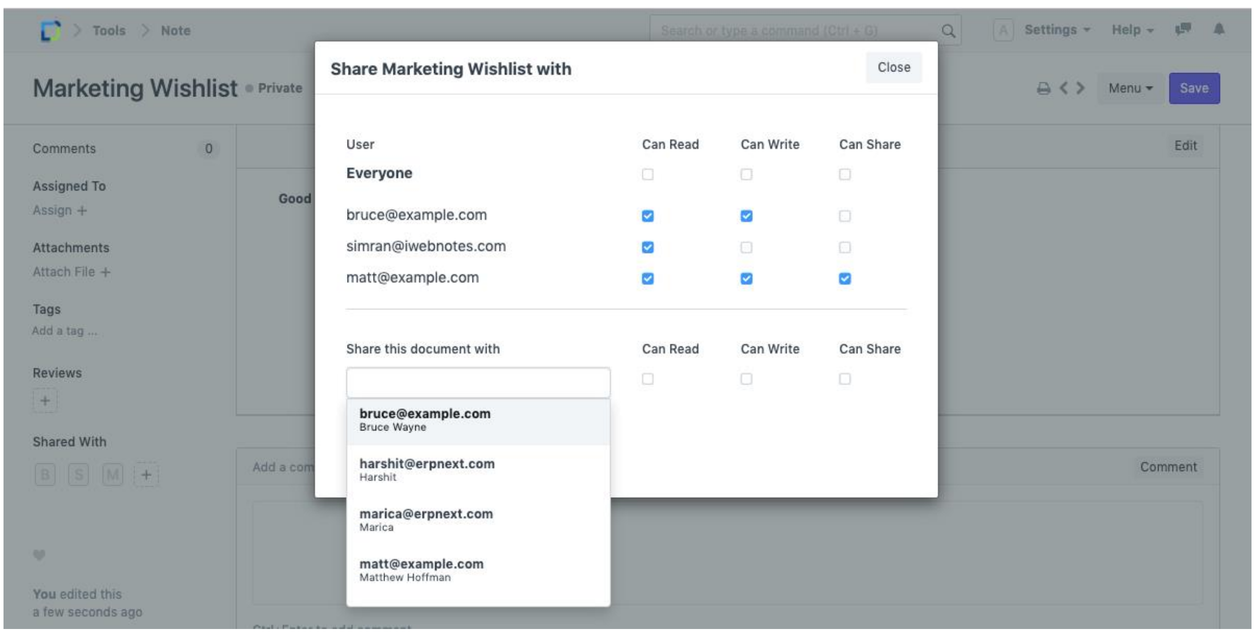
You can select whether or not you want this particular Note to be Public. Making a Note public will allow you to share it across Users in your DellSuite account.



Once you enable making a Note Public, there will be another checkbox, saying 'Notify users with a popup when they log in'.

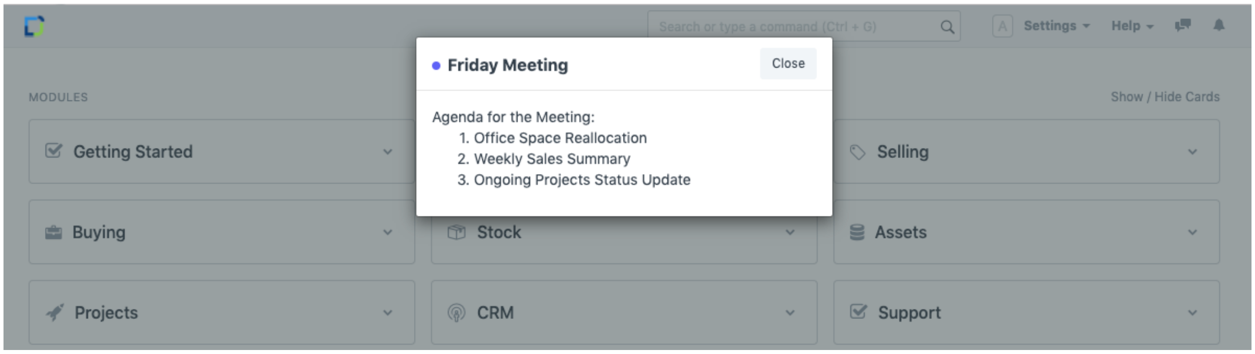


You can also select if you wish to give some specific users, the right to read, write or share your note. This can be done from the 'Share' option in the left sidebar.



Notification for Notes

Enabling this property would ensure that whenever any User logs into their account, there will be a Pop-Up notification for the note.



Video

Videos can be added from both Vimeo and YouTube, using the Video DocType.

You can add Videos with their URLs, descriptions, thumbnails, etc. Some of its uses are to maintain educational course material and to track personal YouTube video engagement.

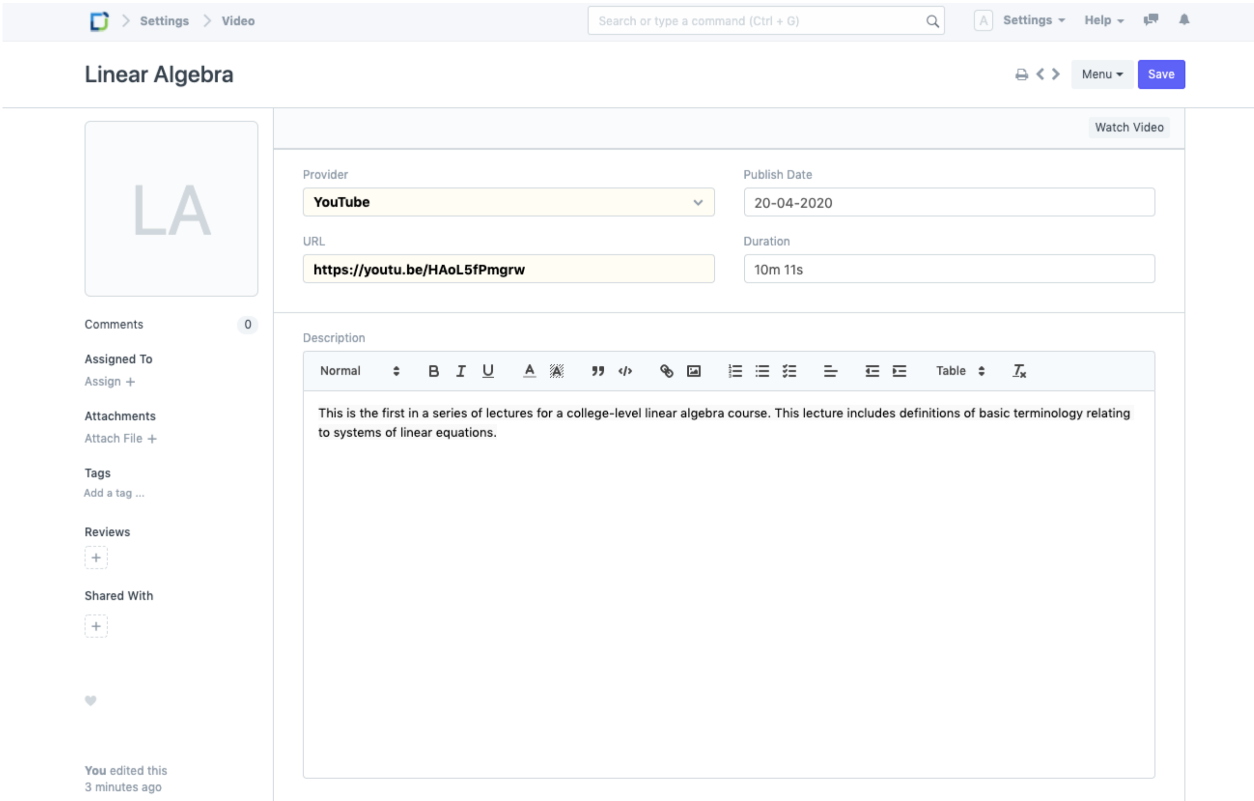
To access Videos, go to:

```
Home > Tools > Video
```

1. How to create a new Video

1. Go to the Video list and click on New.
2. Enter the title for the Video.
3. Select the Provider. The default Video Provider is YouTube.
4. Enter the URL to access the Video.
5. You can optionally add a publishing date and duration of the Video in days-hours-minutes-seconds.
6. You must also add some description for it.
7. Save.

After Saving, you will get a provision to add an image/thumbnail for the Video.



You can also watch the Video in the Document itself after saving it.

2. Features

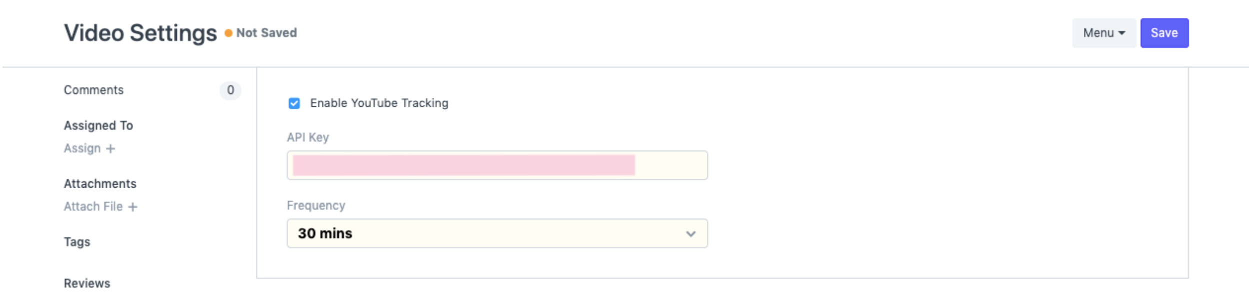
2.1 Tracking Video Analytics via YouTube

YouTube Video statistics can be tracked and analysed. This is useful to track the view count and engagement of a Video you published.

For this you must first enable YouTube Tracking in **Video Settings**:

```
Video Settings > Enable YouTube Tracking
```

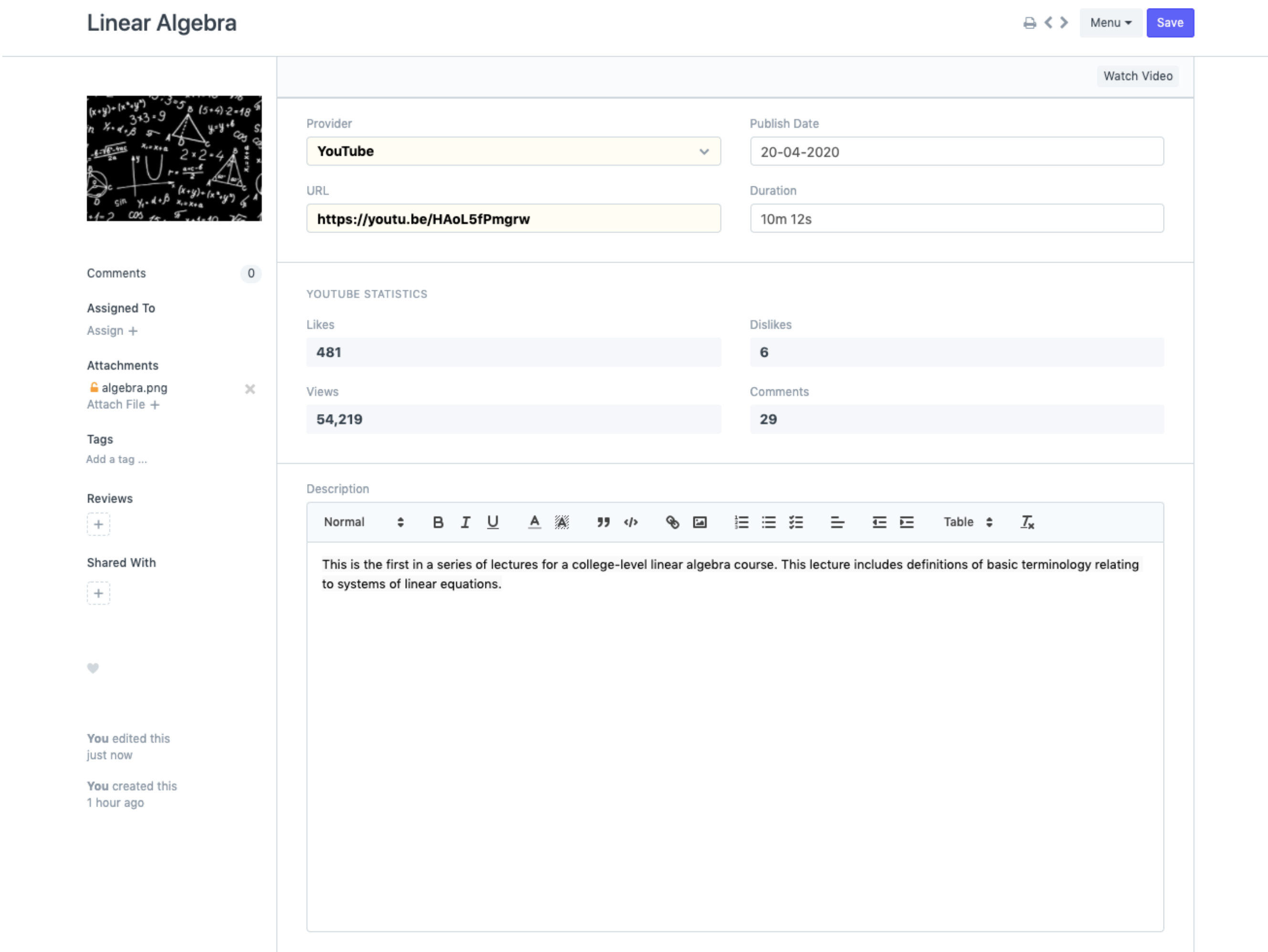
Once you enable this, the **API Key** and **Frequency** fields will be visible.



API Key : You can generate an API Key in your Google Developers Console. You can refer to the YouTube Data API Documentation for steps to generate the same.

Frequency: You can choose how often the system must automatically update your statistics. The available options are every 30 minutes, 1 hour, 6 hours and Daily (once everyday).

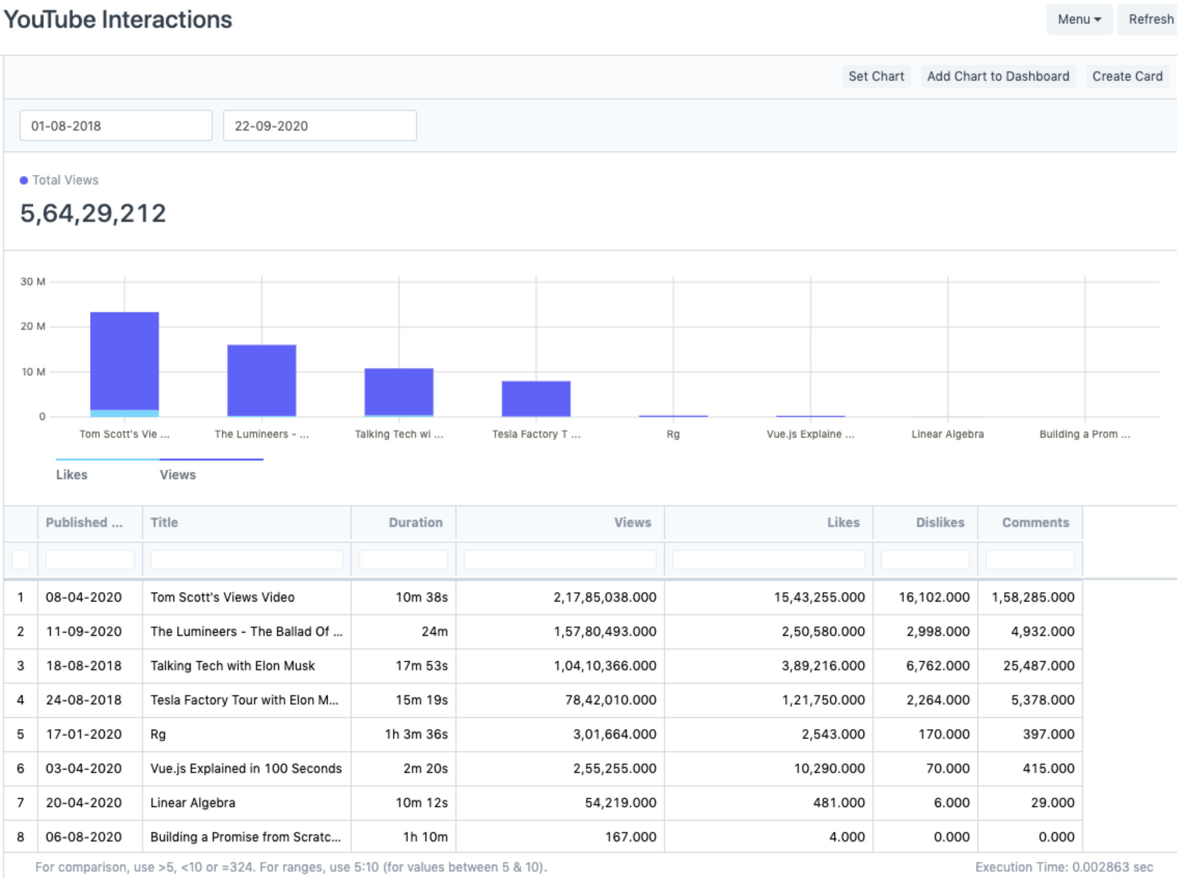
Apart from automatic updation, the statistics are updated on Save. So, all the Videos created/updated **after** enabling YouTube tracking, will have statistics updated on Save.



2.2 YouTube Interactions Report

The YouTube Interactions Report provides a consolidated view of all the videos' engagements. The bar chart provides visual analysis of Likes vs Views.

You can filter the report data by the Published Date range.



	Published ...	Title	Duration	Views	Likes	Dislikes	Comments
1	08-04-2020	Tom Scott's Views Video	10m 38s	2,17,85,038.000	15,43,255.000	16,102.000	1,58,285.000
2	11-09-2020	The Lumineers - The Ballad Of ...	24m	1,57,80,493.000	2,50,580.000	2,998.000	4,932.000
3	18-08-2018	Talking Tech with Elon Musk	17m 53s	1,04,10,366.000	3,89,216.000	6,762.000	25,487.000
4	24-08-2018	Tesla Factory Tour with Elon M...	15m 19s	78,42,010.000	1,21,750.000	2,264.000	5,378.000
5	17-01-2020	Rg	1h 3m 36s	3,01,664.000	2,543.000	170.000	397.000
6	03-04-2020	Vue.js Explained in 100 Seconds	2m 20s	2,55,255.000	10,290.000	70.000	415.000
7	20-04-2020	Linear Algebra	10m 12s	54,219.000	481.000	6.000	29.000
8	06-08-2020	Building a Promise from Scratc...	1h 10m	167.000	4.000	0.000	0.000

For comparison, use >5, <10 or =324. For ranges, use 5:10 (for values between 5 & 10). Execution Time: 0.002863 sec

Note : The quota for the number of **non-billable** requests to the YouTube Data API is 10,000 requests as of September 2020. DellSuite automatically updates upto 50 videos in 1 request. Similarly, for 100 videos it would take 2 requests.

Assuming 100 videos are updated **every hour** (frequency = 1 hour):

> - 2 requests will be sent per hour

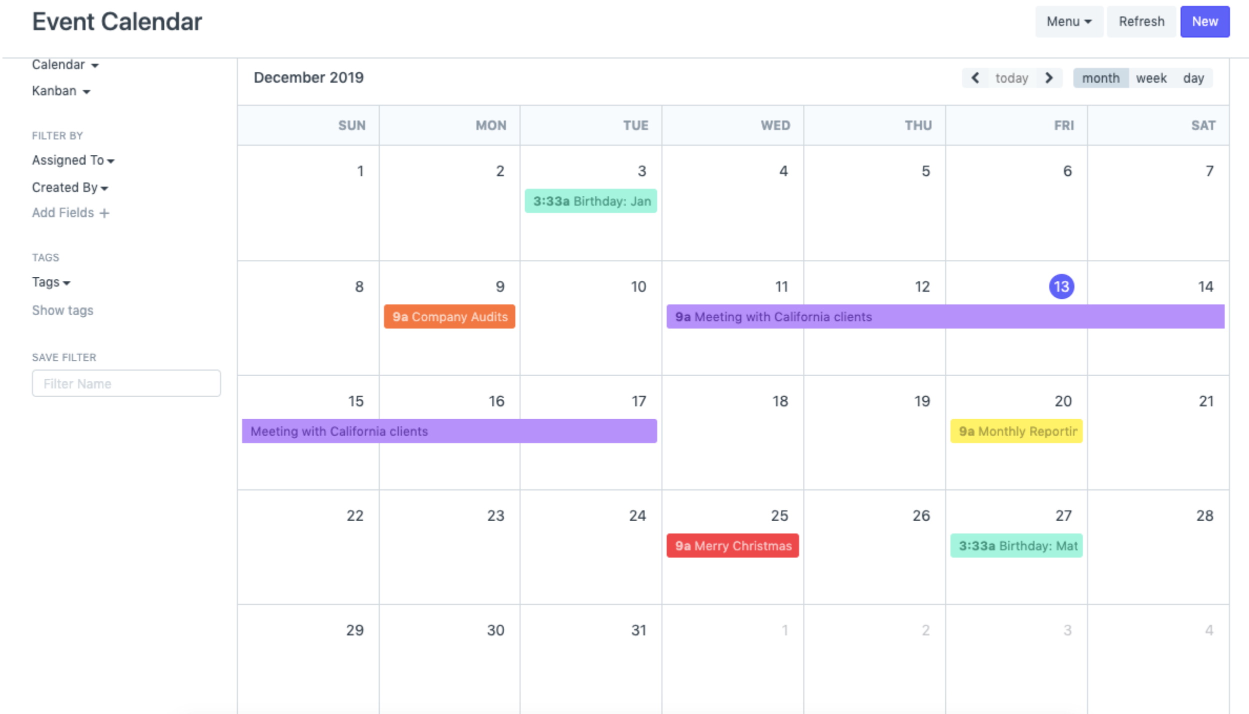
- 48 requests will be sent per a day

Please set the frequency accordingly.

Calendar

The Calendar is a Tool which helps you to create, share and keep track of events in your DellSuite account.

You can have a Day, Week or Month view in a calendar.



To access calendar, go to:

Home > Tools > Calendar

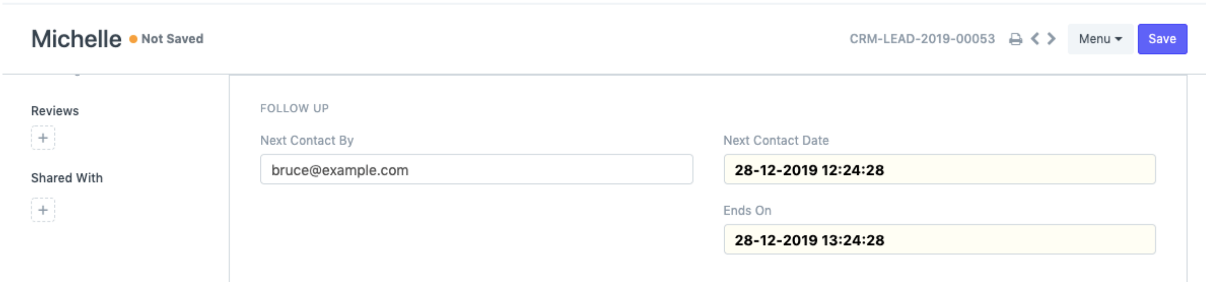
1. Creating Events in Calendar

1. Go to Calendar and click on New.
2. Enter the Subject and the Start Date of the event.
3. Save.

Alternatively, you can also create an event from the 'Day View' of the Calendar. This view is broken into various slots throughout the day. You can select the slot for the start of the event, enter the subject of the event and drag it own till the event end time.

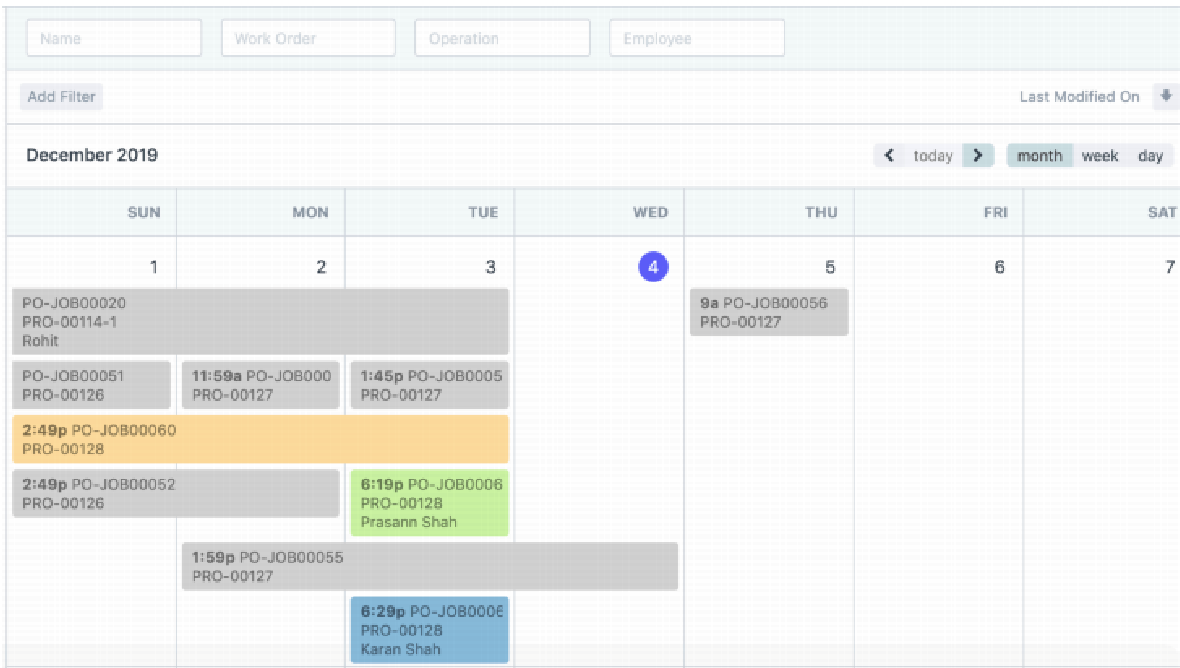
1.1. Event Based on a Lead

In the Lead form, you will find a field called Next Contact By and Next Contact Date. Once you specify the date and the User in these fields, an event will automatically be created for the User on the given date and time.



1.2. Event Based on Job Cards

For every Job Card that gets created for a User in the DellSuite account, a corresponding event will be created in the Calendar.



1.3. Birthday Event

Birthday Event is created based on Date of Birth specified in the Employee master.

1.4. Recurring Events

There are various events in an organization that occur regularly at periodic intervals. In DellSuite, you can create such events by enabling the 'Repeat this Event' property for that particular event.

When you do this, you will ve asked to enter the periodicity of this event in the 'Repeat On'. This could be daily, monthly, weekly or Yearly.

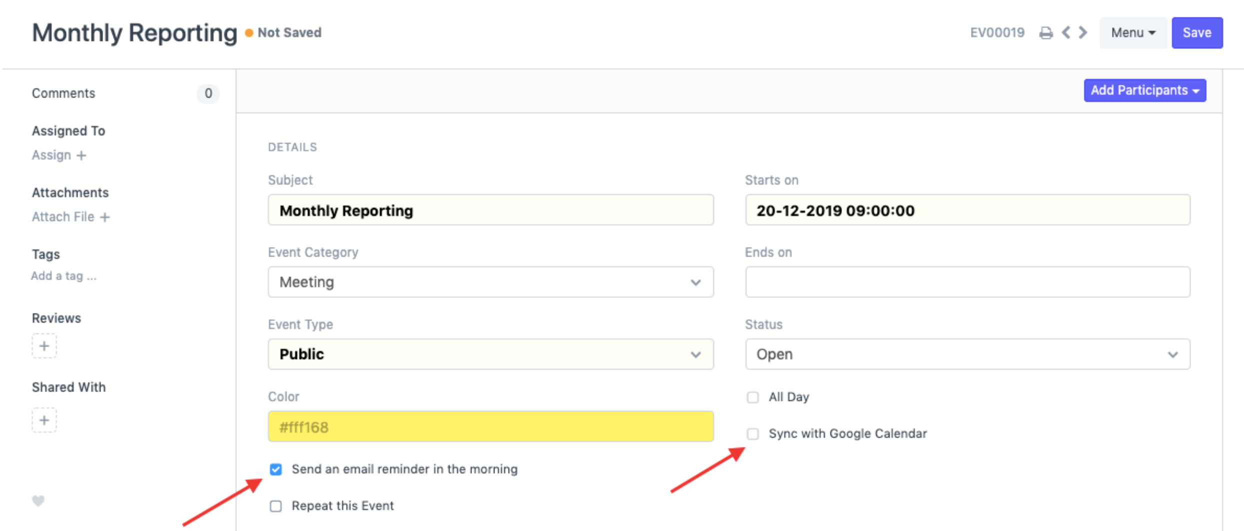
You can also enter the last day of the repeated occurrence in the 'Repeat Till' field. In case of infinite repetitions, you may choose to leave this field blank.

1.5. Event Reminders

There are two ways you can receive email reminder for an event.

1. Enable Reminder in Event

   In the Event master, checking "Send an email reminder in the morning" will trigger a notification email to all the participants for this event.

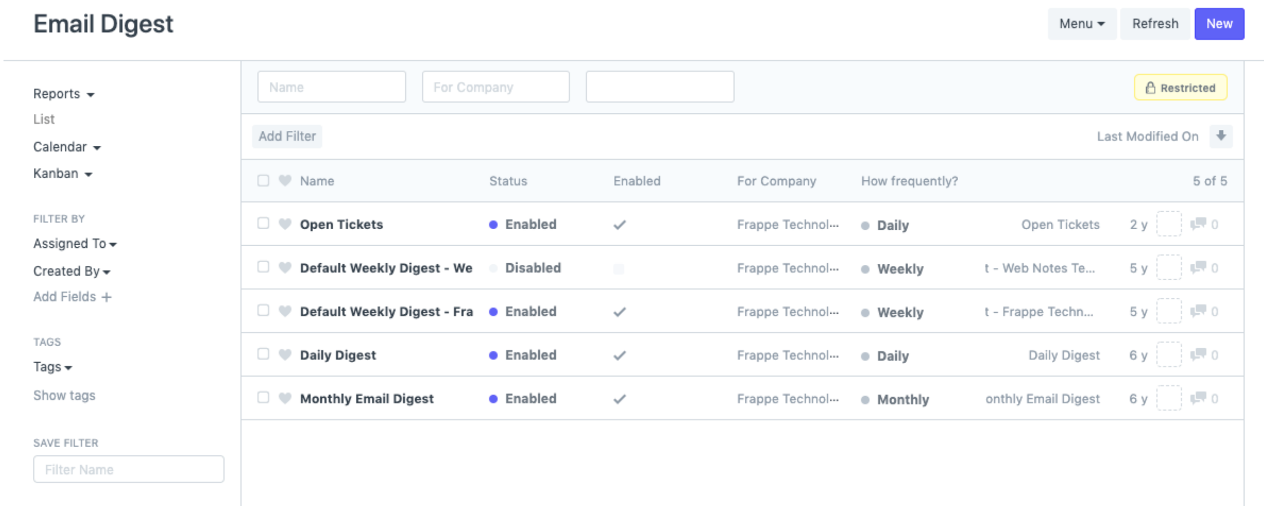


2. Create Email Digest

   To get email reminders for event, you should set Email Digest for Calendar Events.

   Email Digest can be set from:

   ```
   Setup > Email > Email Digest
   ```



Dashboard

Introduced in Version 12

Dashboard provides an at-a-glance view of key performance indicators relevant to the business process.

Each Dashboard consists of one or more than one Dashboard Charts each of which are configured with a data source known as Dashboard Chart Source.

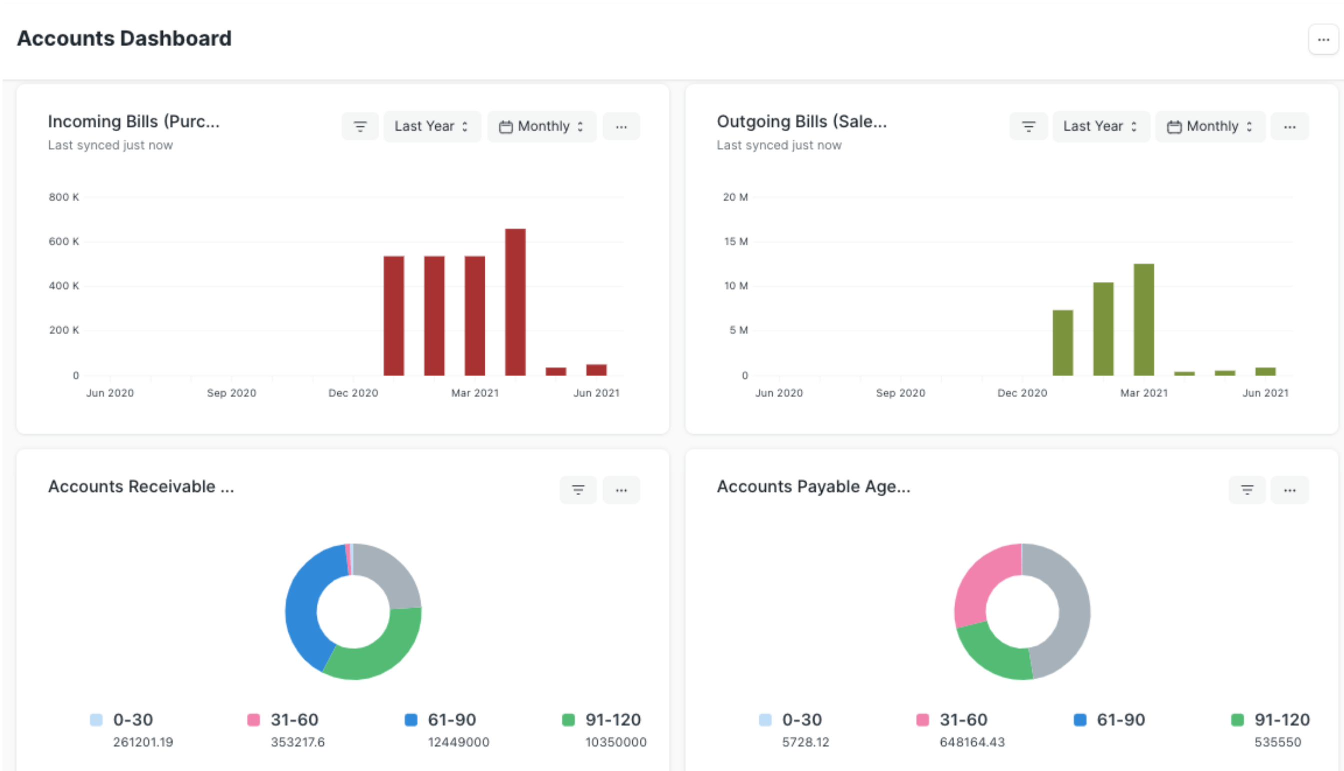
To access Dashboard, go to,

Home > Customization > Dashboards > Dashboard

1. How to Create a New Dashboard

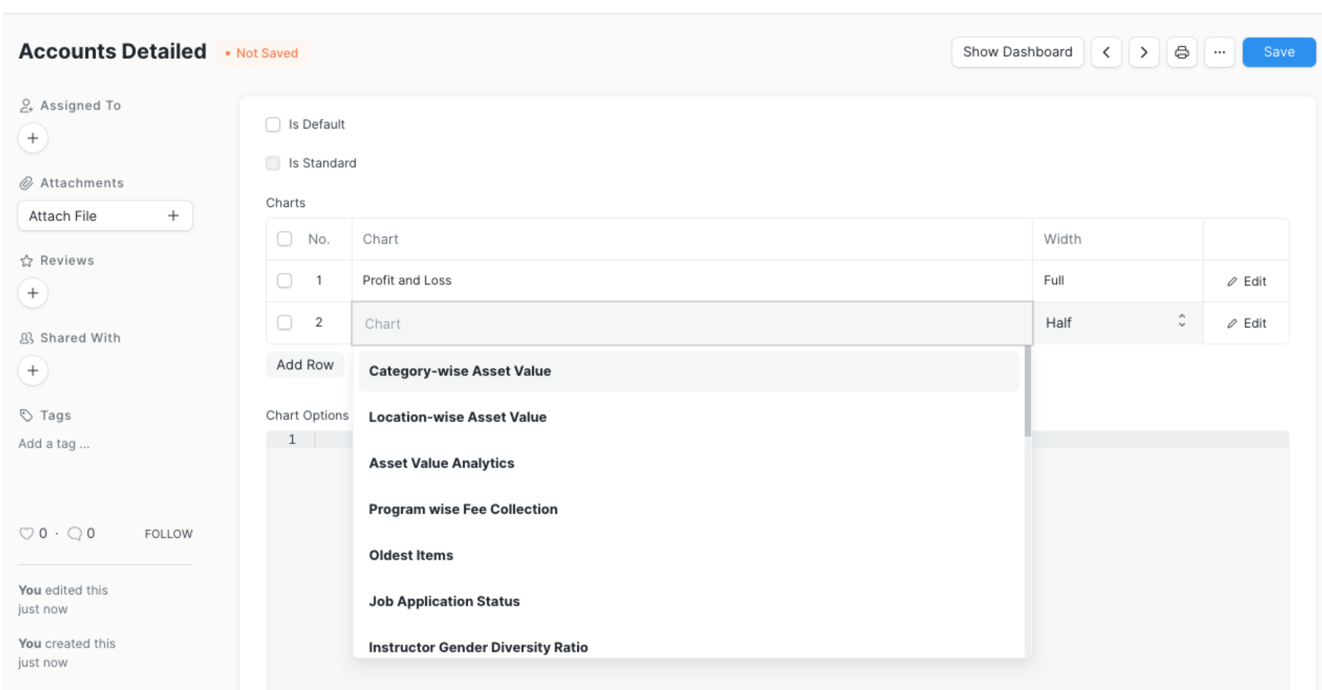
1. Go to Dashboards List and click on New.
2. Enter the Module Name for which you would want to see the Dashboard.
3. Enter the Dashboard Charts that you would want to be parameterized for this Dashboard.
4. Save.

When you click on `Show Dashboard`, you will be able to see the Dashboard giving the graphic representation of your transactions.

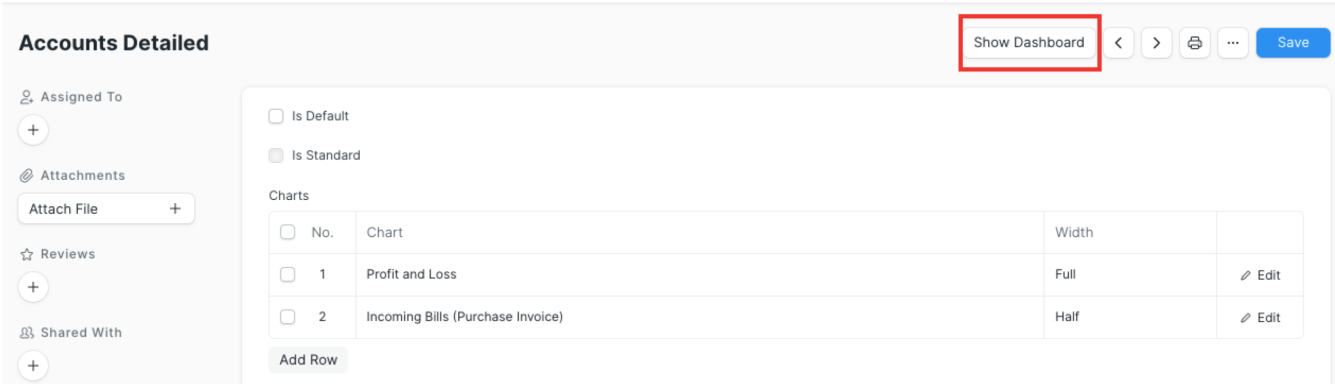


2. Adding Charts to Dashboard

Add charts to this dashboard by either selecting existing `Dashboard Chart` or creating new ones.



Save changes and click on `Show Dashboard` button to see the dashboard.



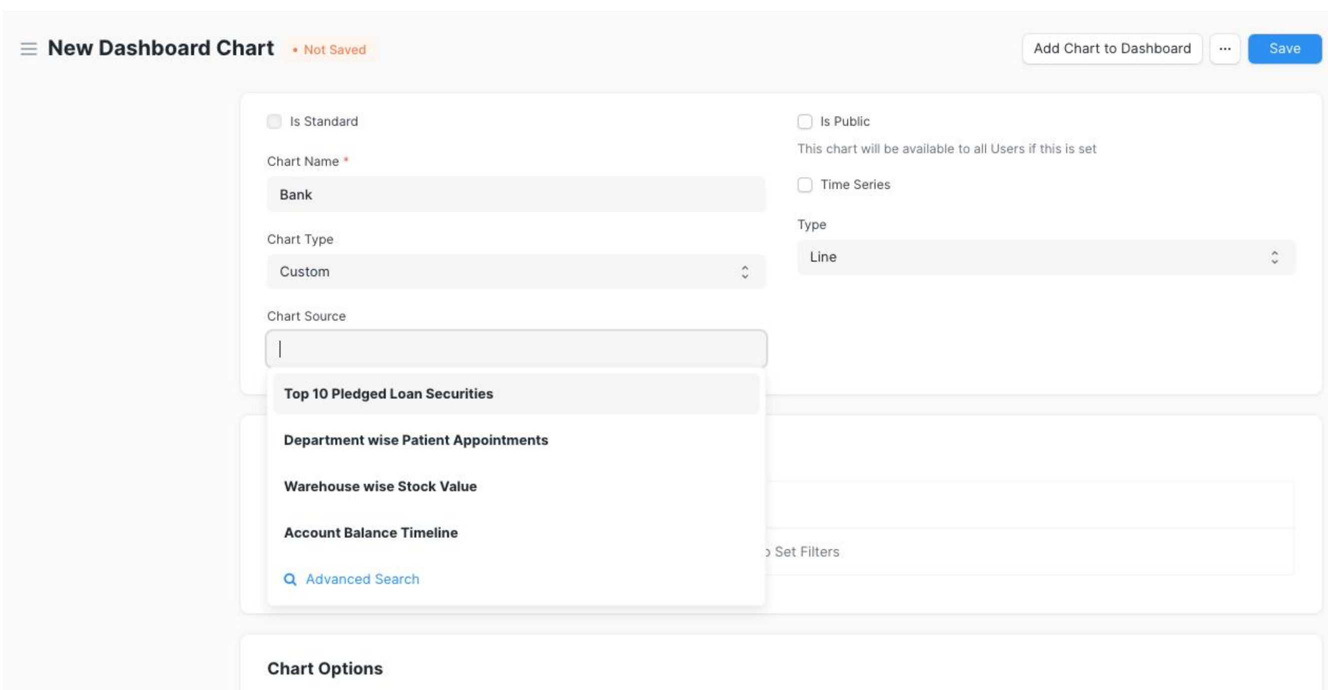
3. Creating a New Dashboard Chart

To create a new Dashboard Chart, go to

```
Home > Customizations > Dashboards > Dashboard Chart > New
```

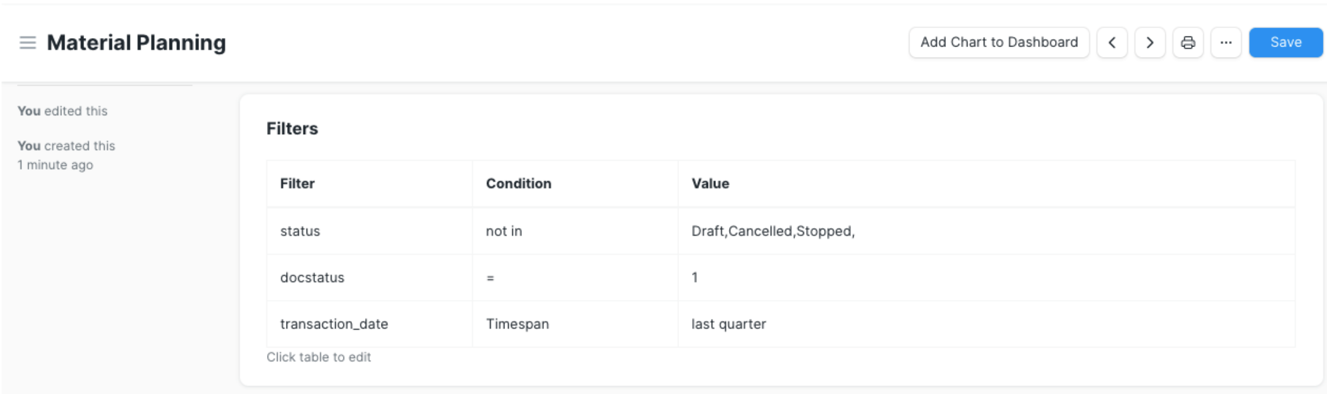
Provide a name for the chart, this will show up in the dashboard as the chart label, select chart type as `Custom` and select a `Dashboard Chart Source` as the data source for this chart.

Note: New `Dashboard Chart Source` can only be created by the Administrator User in Developer Mode.

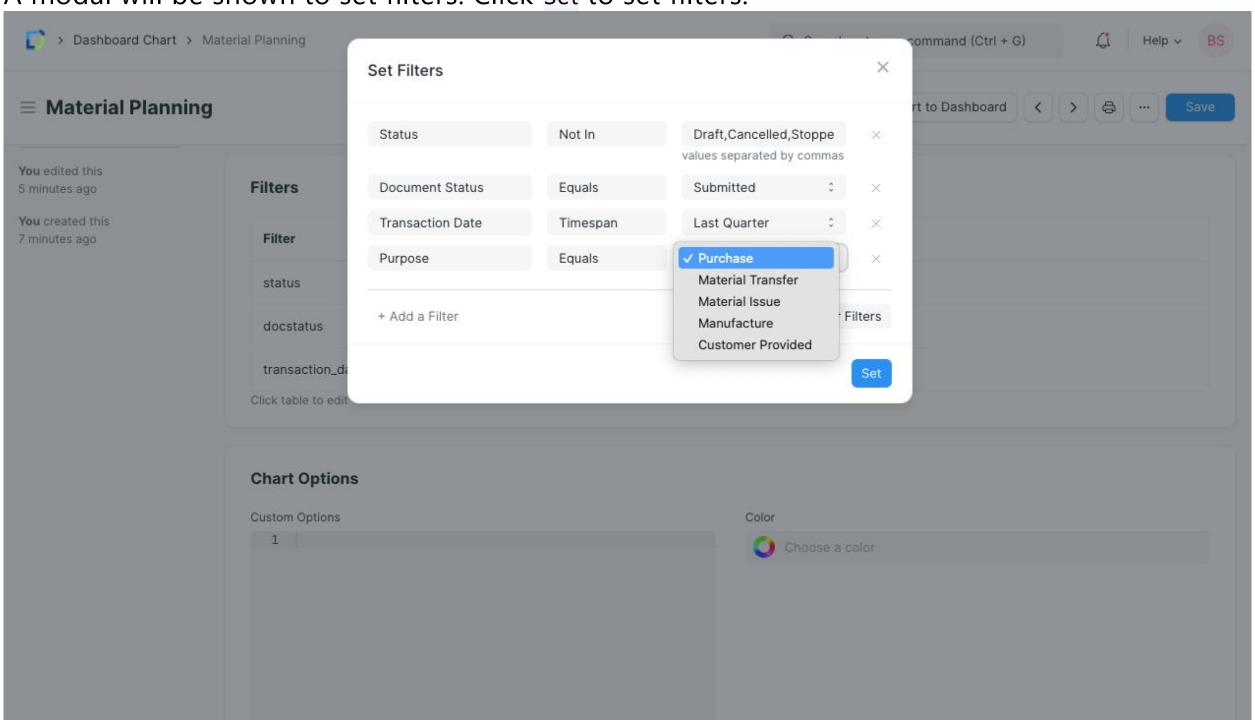


After setting the Chart Source field, the filters table will be shown.

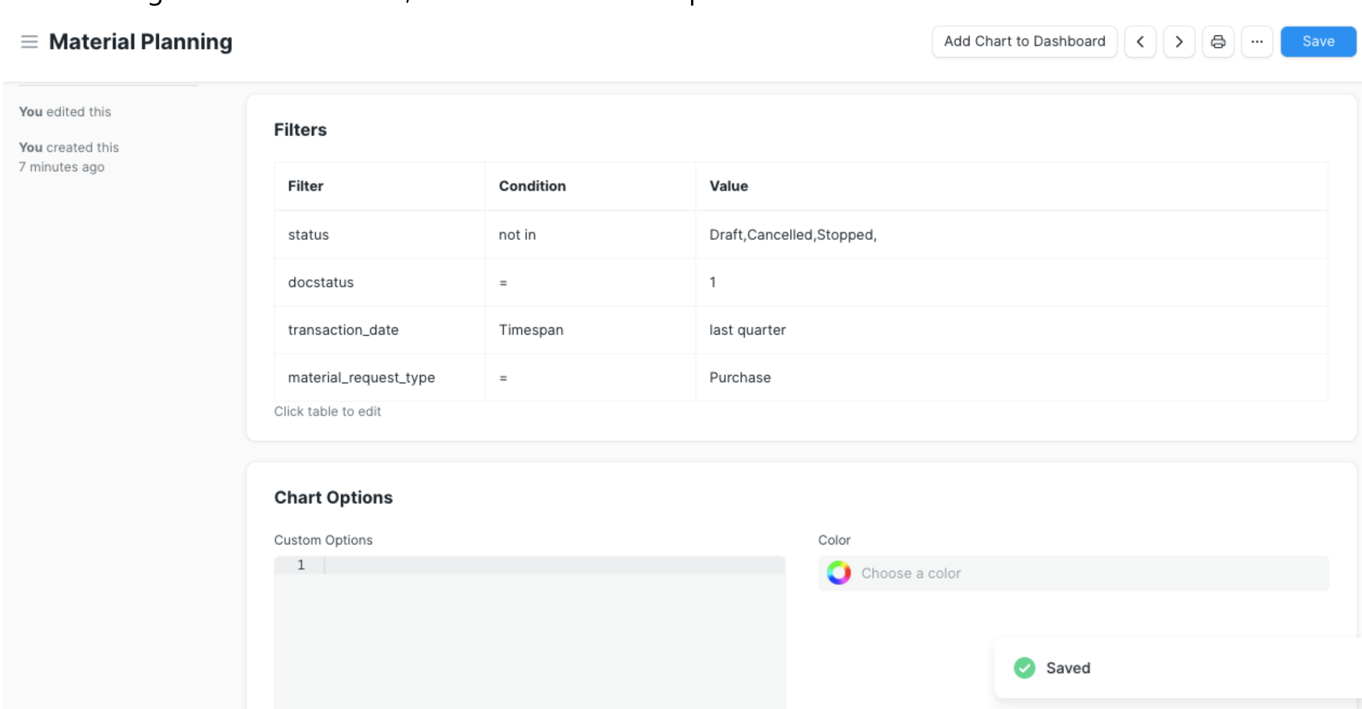
Click the table to edit filters.



A modal will be shown to set filters. Click `Set` to set filters.



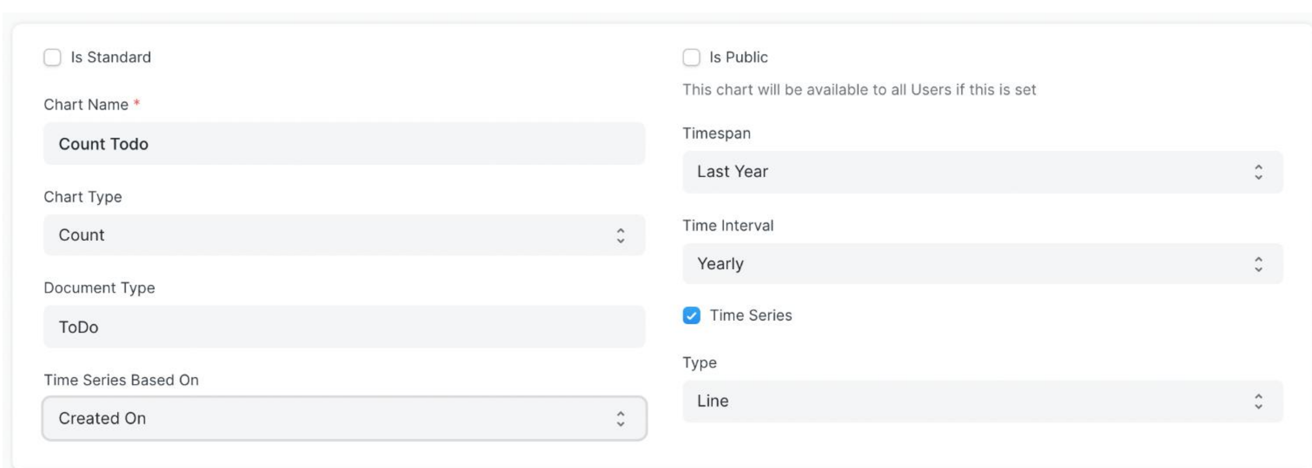
After setting Chart Source field, Filters table will be updated with selected filter values.



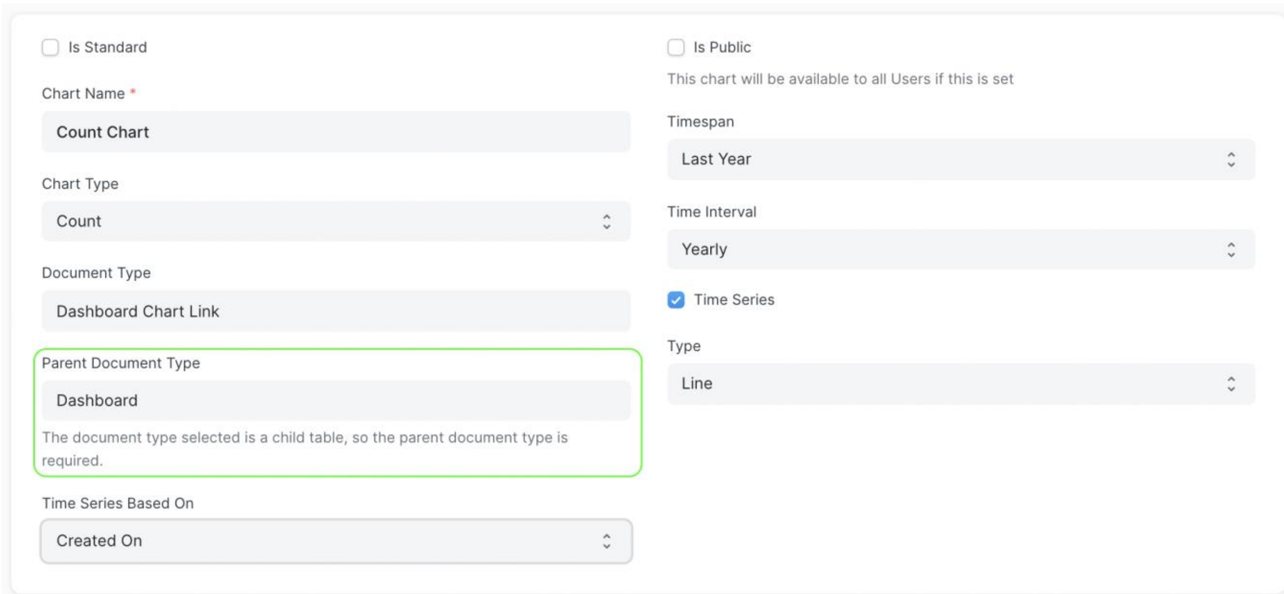
In the above example, we created a custom `Dashboard Chart` for which we already had a `Dashboard Chart Source`.

You can also create basic charts like Count/Sum/Average/Group By of ToDo based on creation/modified date by selecting `Count/Sum/Average/Group By` as `Chart Type` also you can use an existing report as a source in `Report Name` field to create a chart by selecting `Report` as `Chart Type`.

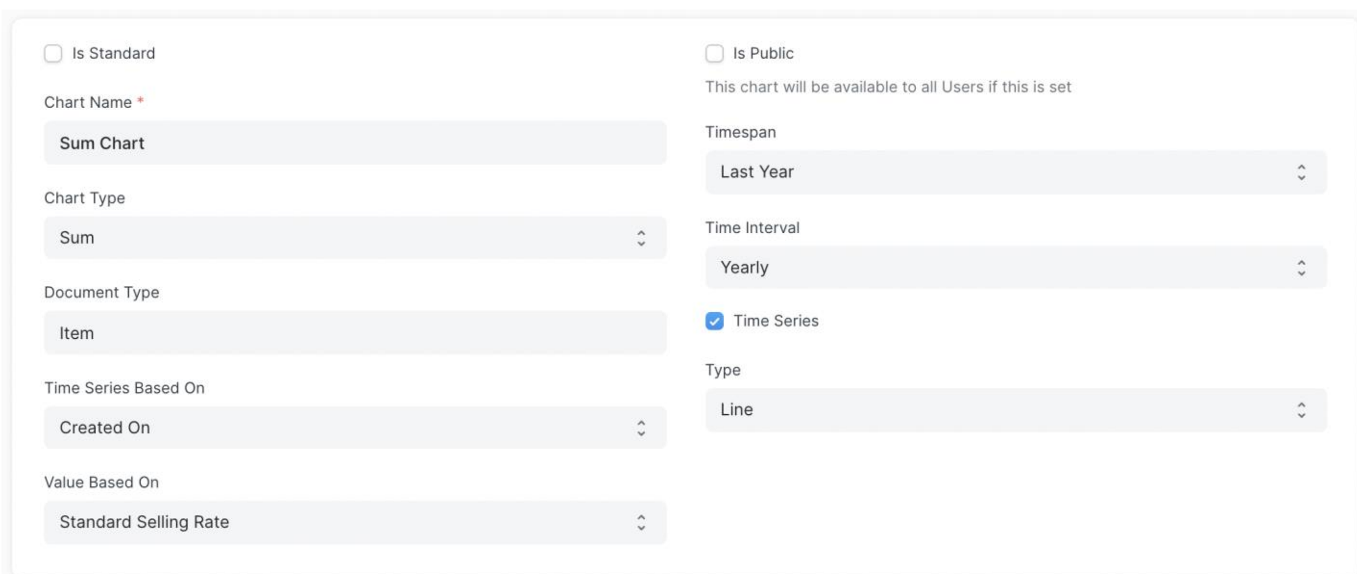
For `Count`, you need to select the `Doctype` for which you need the chart in the `Document Type` field and `Based On Date` field in `Time Series Based On`.



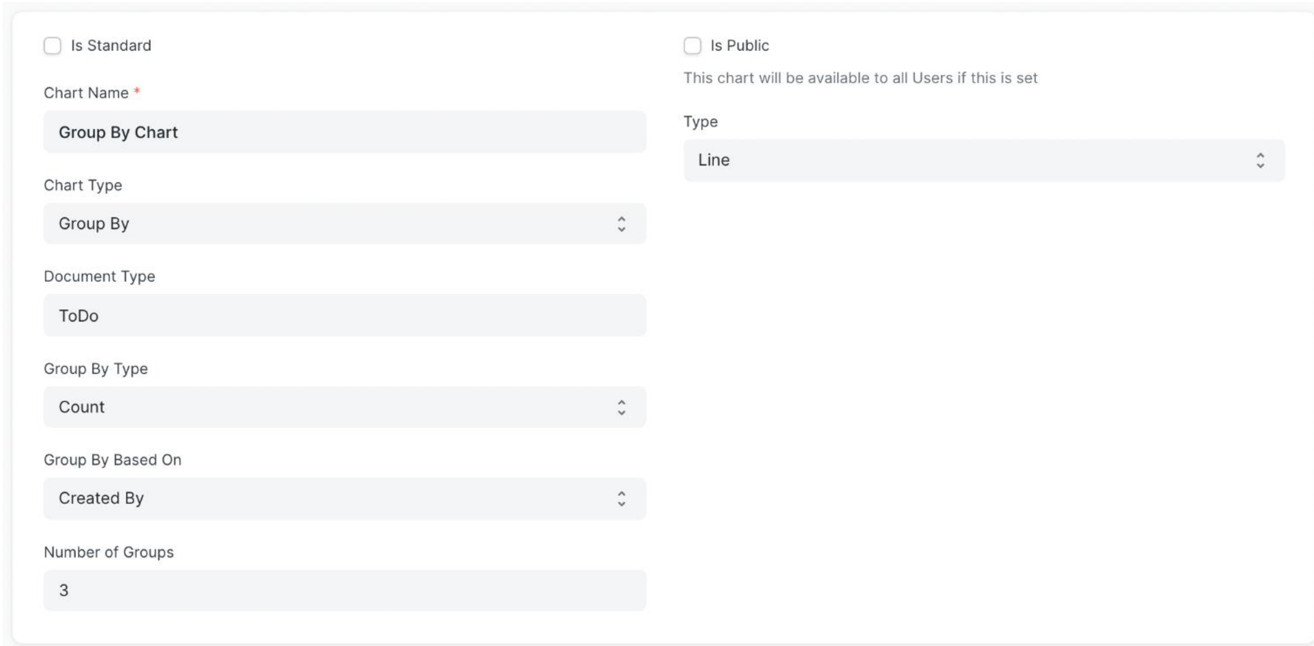
Note: If you select a child table doctype in `Document Type` you also have to select the parent doctype for that child table in `Parent Document Type` (this field will only be visible when you select child table doctype in `Document Type` field).



For `Sum` and `Average` you also have to select the `Based On Value` field in `Value Based On`.

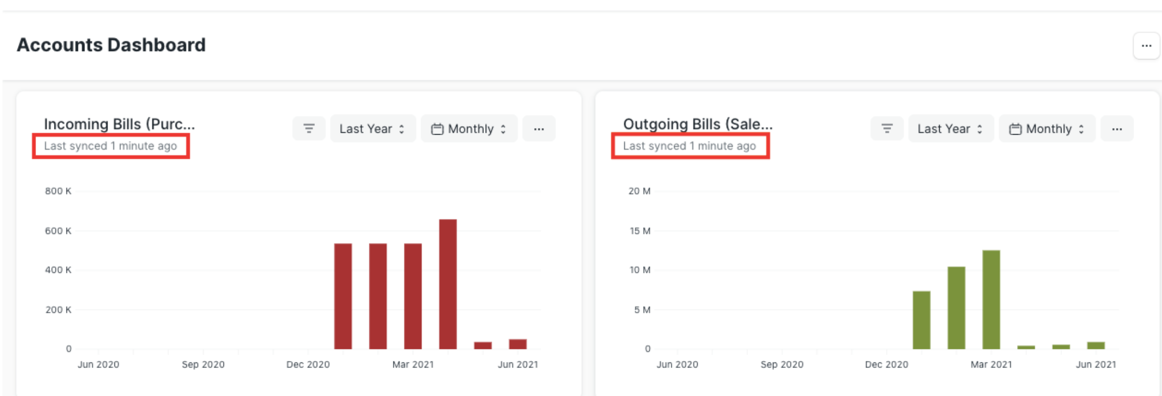


For `Group By` you can select `Group By Type` as Count/Sum/Average, `Group By Based On` as Created By/Modified By, and `Number of Groups`.

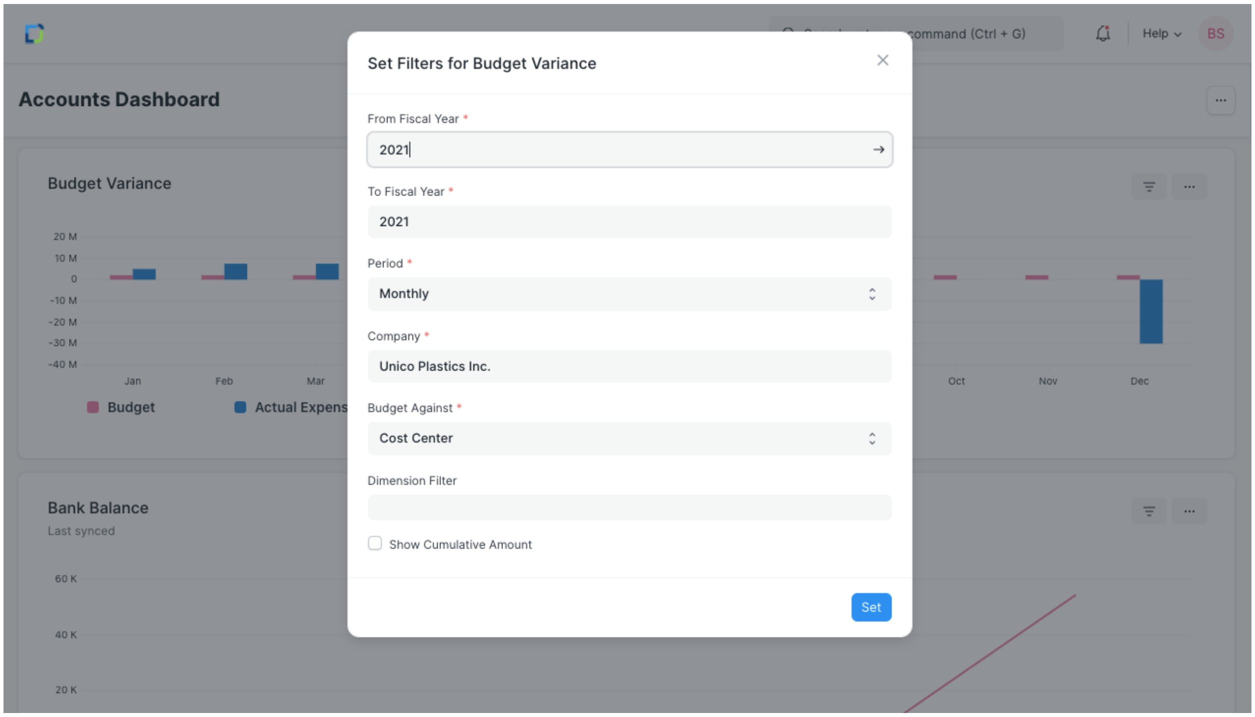


4. Using Dashboards

Every chart will be shown according to the fields set in the corresponding Dashboard Chart. The result from the dashboard chart source is cached to avoid redundant queries. Since the chart data can be stale, each chart will also show the last synced time.



The filters used to generate the chart data can also be changed by clicking `Set Filters`. The chart will be refreshed automatically according to the recently set filters.



To get the most recent data each chart has to be refreshed forcefully by clicking **Force Refresh** button from the dropdown menu.

Global Search

Global search is a powerful word-processing operation in DellSuite which will help you in searching for a particular Document Type or Document.

For every sequence of a particular word or a set of characters, you will have a search result. Using Awesome Bar for Global Search. Global Search helps users find information quickly. It's located in the upper right-hand corner in DellSuite. Simply entering a few characters in the Search Bar will show results from several different record types (Contact, Customer, Issues, etc.) related to that keyword. You can also customize the fields based on which search will be shown.

You can also type in multiple keywords separated by & operator to find your desired results. You may refer to the following cases for examples:

- Input "apple & iPod" can return documents with one field contain Apple and the other contains iPod(PO's vendor and item).
- Input "iPhone & iPod" can return target documents that contain both item iPhone and iPod (child table items).
- Input "iPhone & black" can return the item with description contains both iPhone and black(long text field).

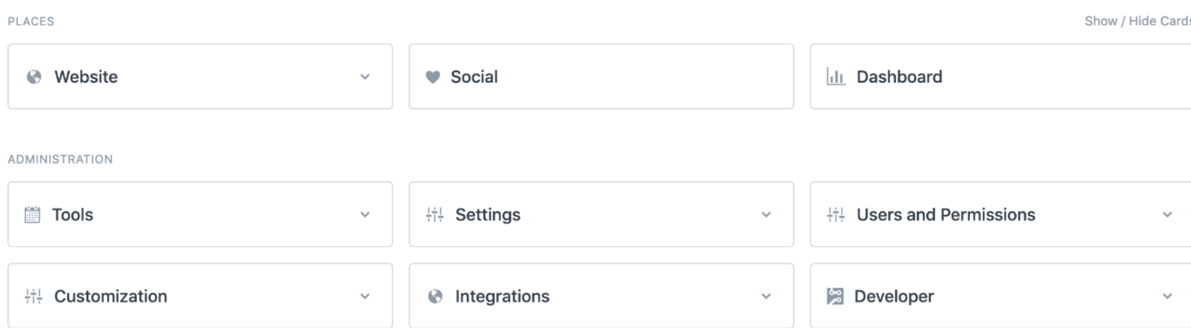
- Input 'foo & bar" can return any docs with both tags foo and bar assigned. (special long text field _usertags).

Enable Global Search for fields in a Doctype.

Desktop

The moment a User logs into the system they will be able to see a Home Screen wherein all the Modules and Domains will be listed in the form of cards.

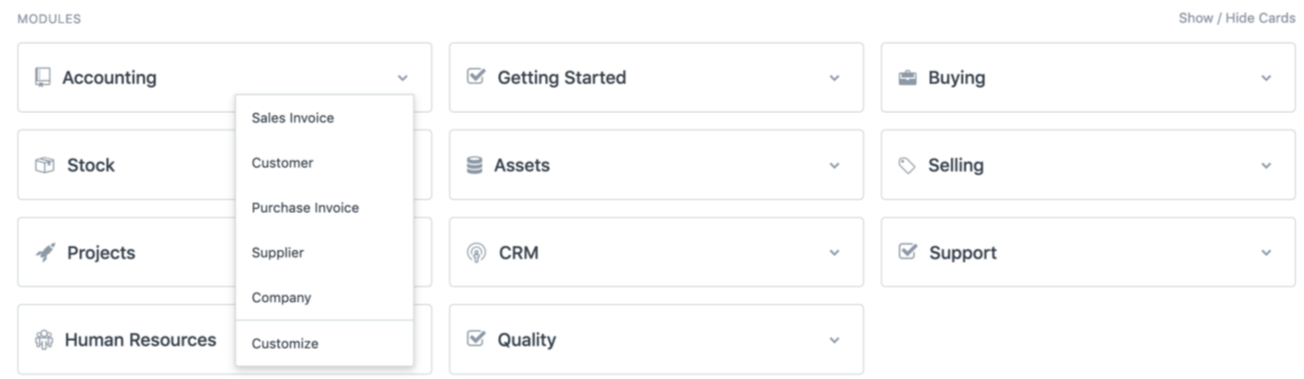
Their cards are a replacement to the erstwhile Module icons which were present in DellSuite versions before version 12.



These cards can be classified into four categories, namely:

- **Modules**: These are all the domain agnostic modules available in DellSuite that are common to all types of businesses. Modules like Human Resources, CRM, Buying, Selling, etc. are put under this category.
- **Domains**: This is where you can find all domain-specific modules like Education and Manufacturing. You can learn more about all industry-specific modules here.
- **Places**: Places is where you can find features that are not industry-specific and are not required in day to day operations of your company. Features like Website, Dashboards, and Marketplace can be found here.
- **Administration**: Here you can find modules related to your DellSuite setup and administration.

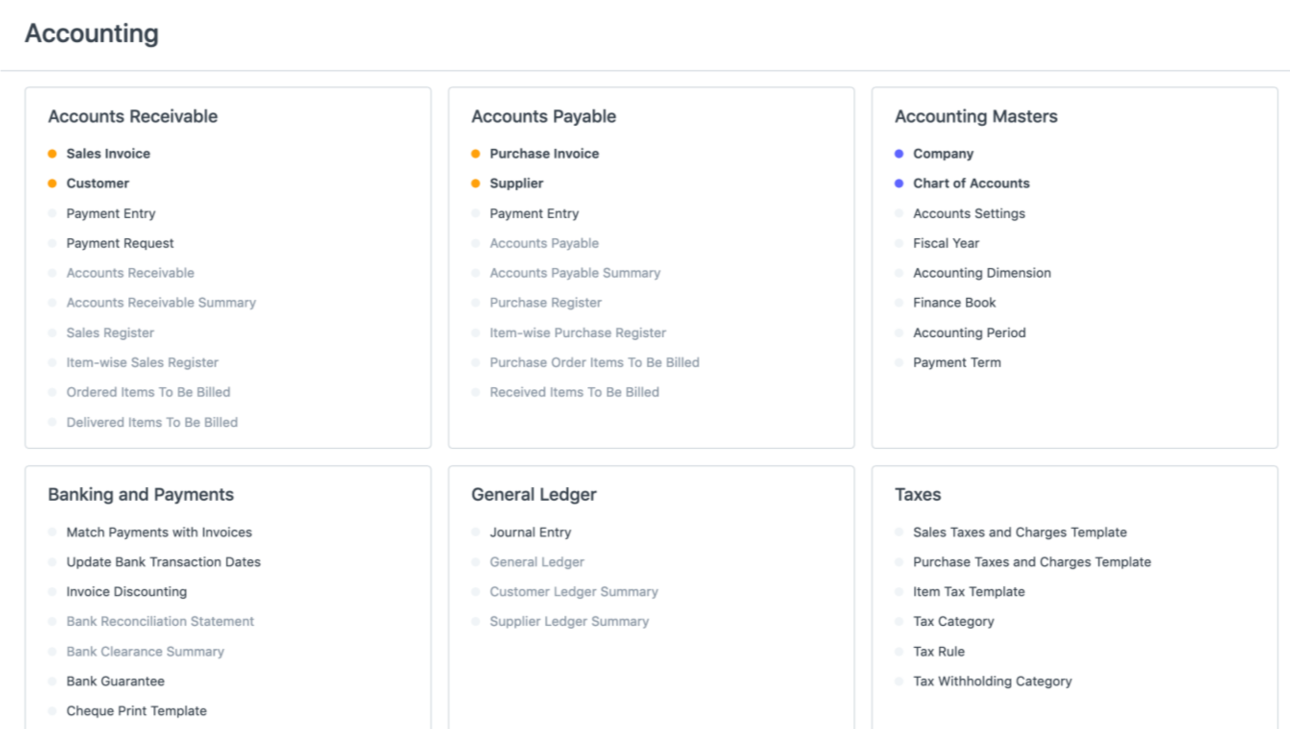
These cards allow better navigation with shortcut items in the drop-down menu. You can customize this drop-down to add or remove links to various DocType for that module.



You can reorder as well as show or hide these module cards.

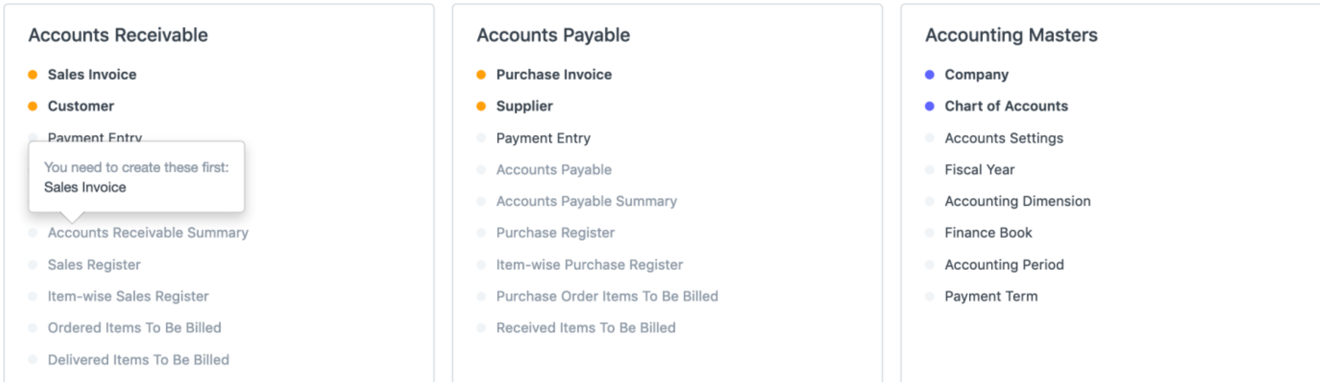
Module Page

Clicking on any module card will take you to the module page. Here the user can navigate through all the doctypes, reports, and settings associated with a particular module. For example, here is how the Accounting module page looks like.

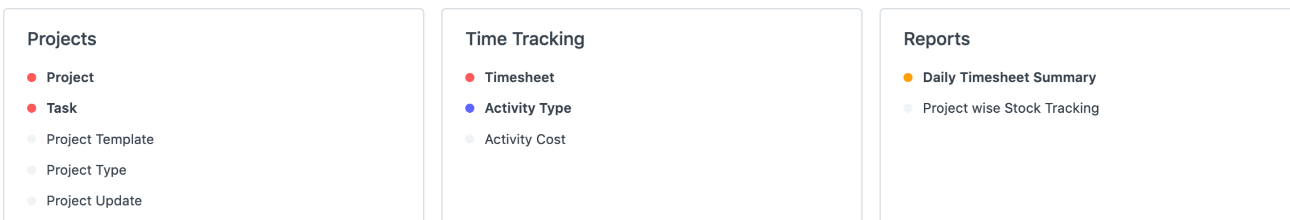


Navigating the page

Some links of these modules may be marked grey, clicking on these links won't open any new page. They are marked so because there is a dependent document that needs to be created first. For example, you will need to build a Sales Invoice before accessing the sales register. Hovering on any of these links will show a pop-up guiding the user to the dependent document.



You shall also notice a color indicator before some of the links. These indicators are used to inform the user if any open or urgent documents need to be looked at.



- The **red** indicator in the above example indicated that there are open or overdue tasks on the list.
- Similarly, a **blue** indicator would mean that there are no open tasks.
- An **orange** indicator means that the report has not been accessed or no document is created in the corresponding doctype.

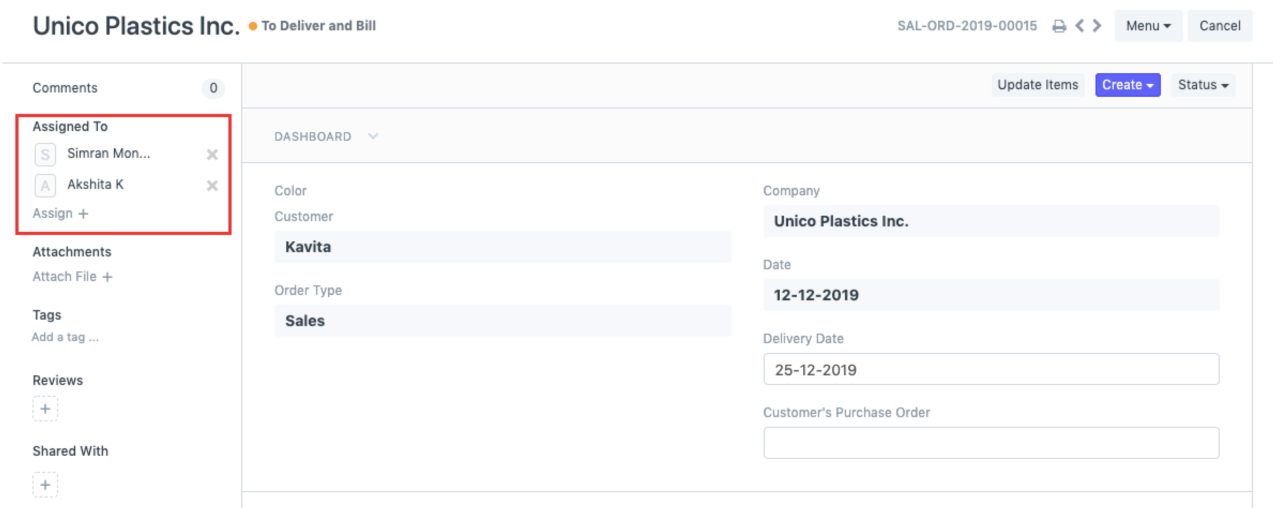
Assignment

Assign To is a feature in DellSuite that allows you to assign a particular document to a specific user, who needs to further work on that document.

For example, if a Sales Order needs to be approved or submitted by the Sales Manager, the first draft user can assign that Sales Order to the Sales Manager.

On assigning this document to the Sales Manager, it will be added to that user's ToDo list.

Similarly, for a Delivery Note and a Sales Invoice against this sales Order, the assignment can be done to a Material User and an Account User.



Note: Assignment can be done irrespective of Permission Restrictions.

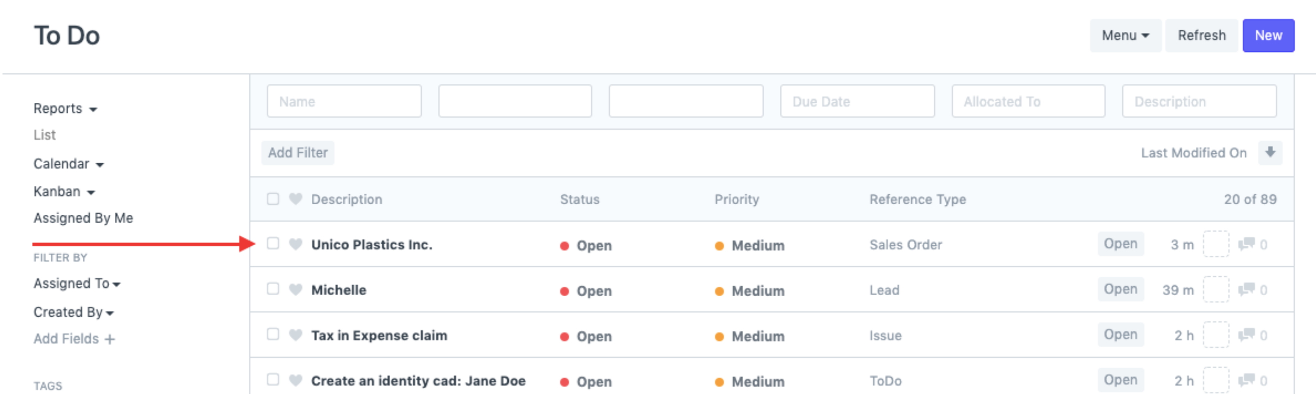
New Assignment

To make a new assignment, go to the document for which you wish to make the assignment and click on the 'Assigned to' button located at the left sidebar. Select the name of the User to whom you want to make this assignment.

Along with assignment, you can also leave a comment for the review of the assignee.

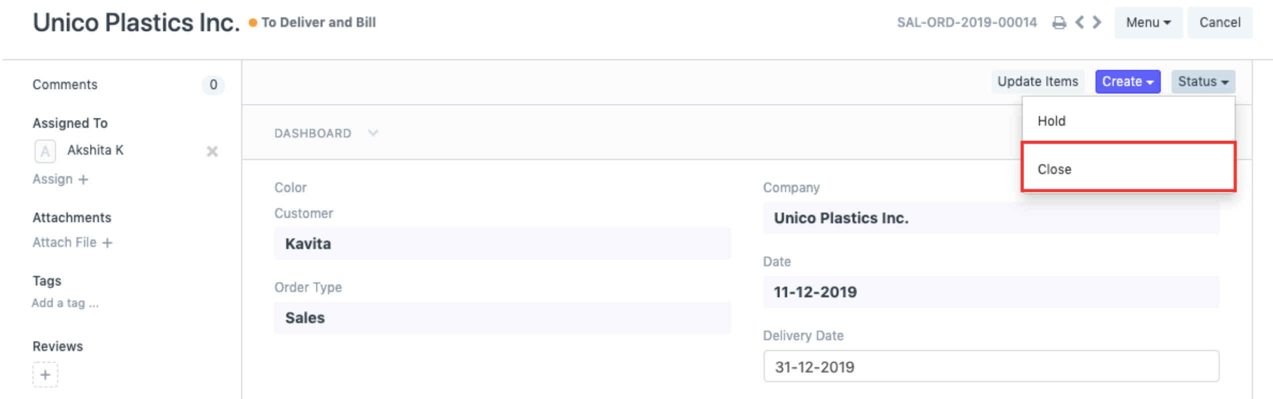
ToDo List of Assignee

Every assignment made to a particular User will be reflected in their ToDo section.



Removing Assignment

Users will be able to remove assignments by clicking on the "Closed" button in the document.



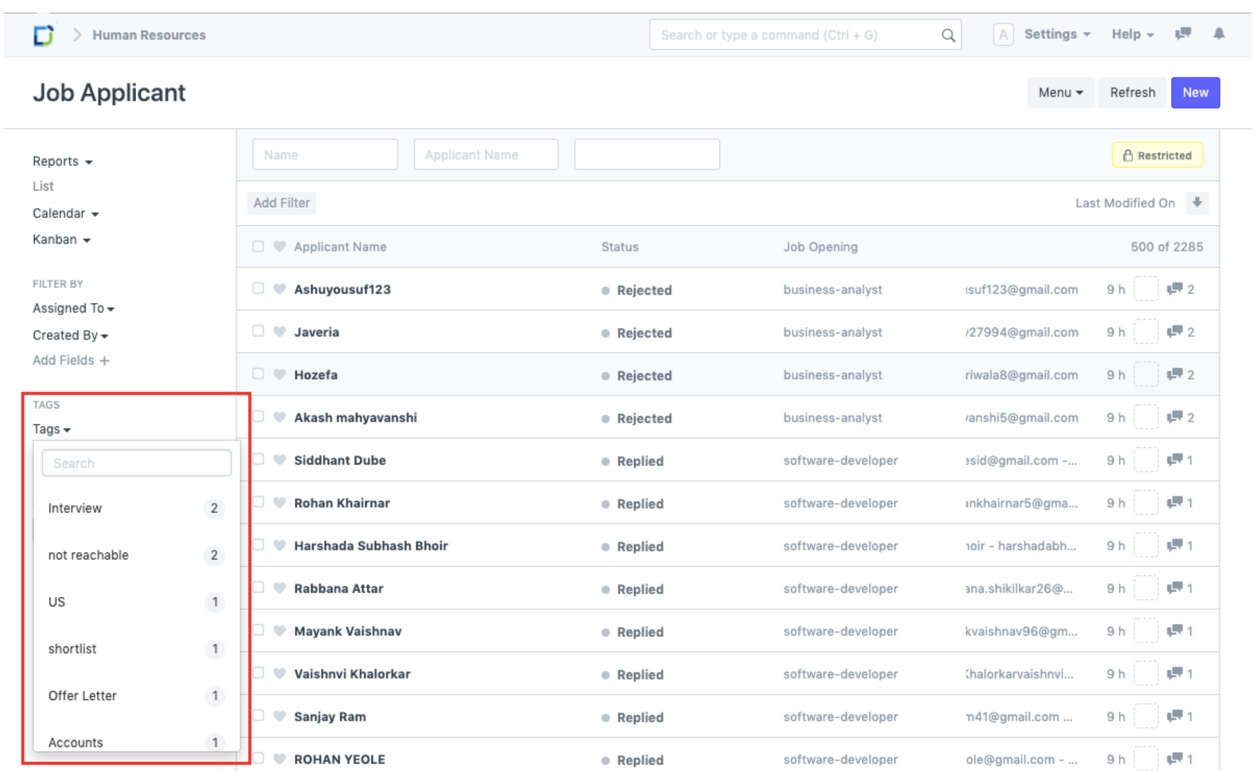
Once the assignment is set as completed, the corresponding ToDo will simultaneously be updated as 'Closed'.

Tags

Using Tags easy way to classify different kinds of documents in their respective categories.

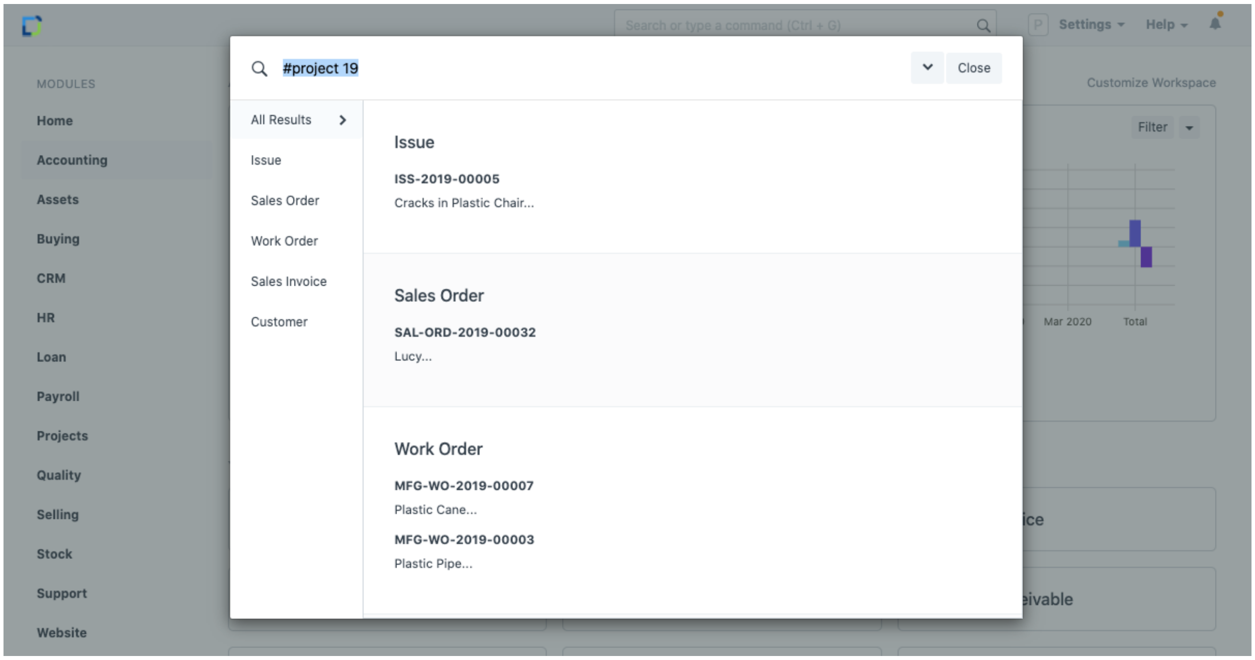
You can add any tag to a DocType just like Assignments and Comments.

While going through a document list, you may filter the same by using tags. At a glance, you will be able to see the number of documents tagged to each classification.



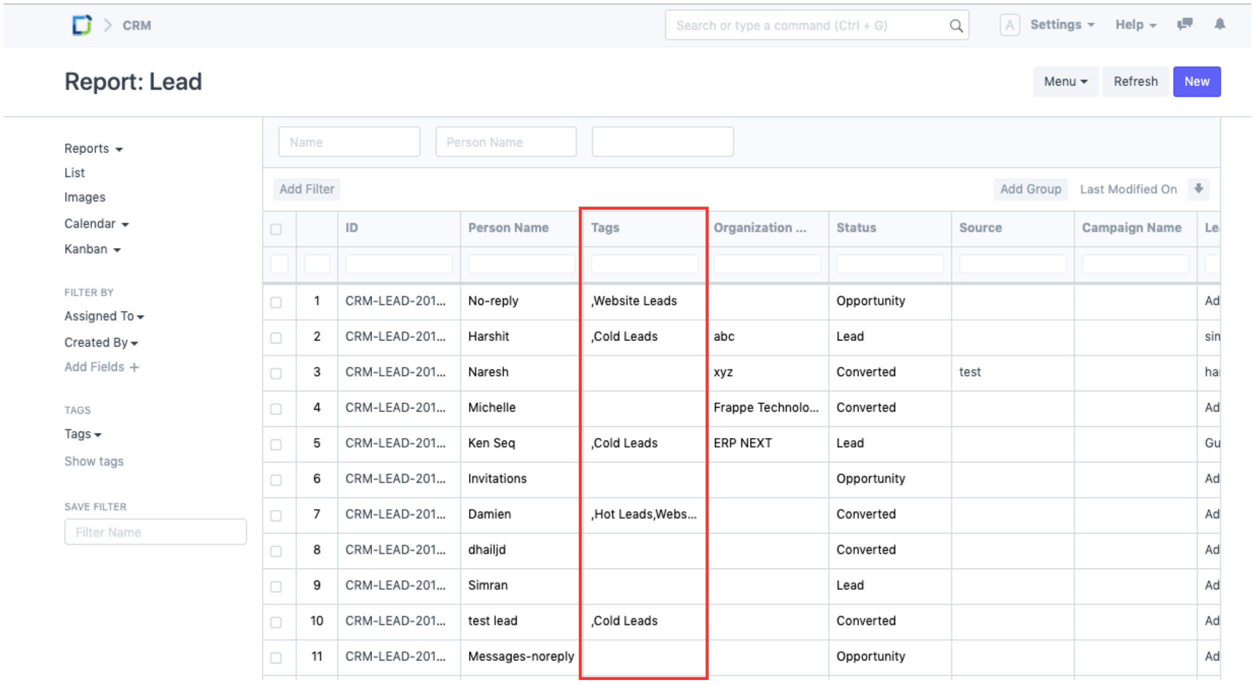
Find all tagged documents

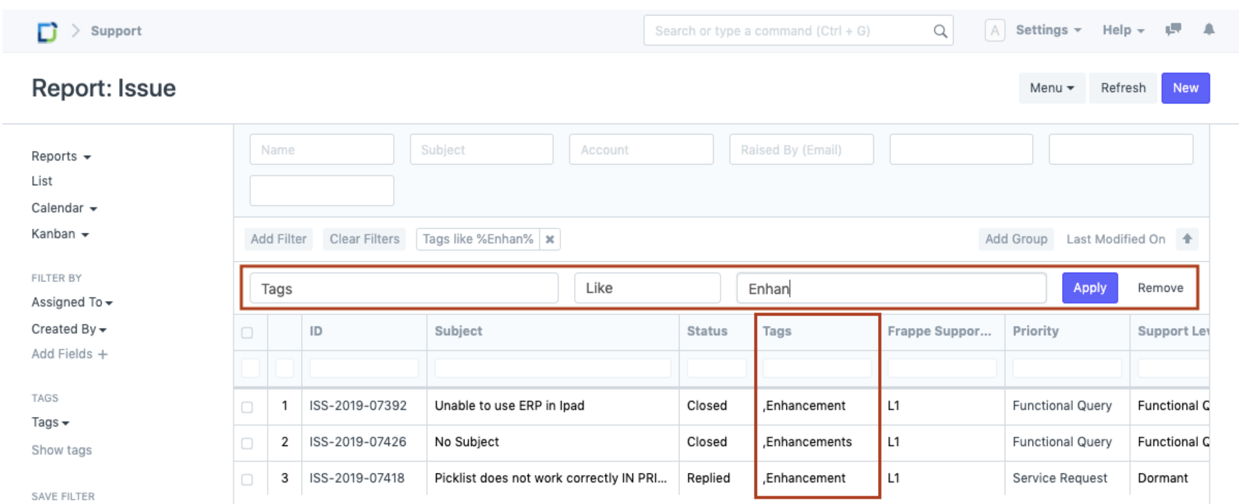
Once you've tagged a couple of documents with a specific tag, you can find all the tagged documents by searching for "#tagname" in the global search bar on the top. For example, consider you've tagged some documents with the tag "project 19". Simply type "#project 19" in the global search bar without quotes and select #project 19 from the results.



Tags in Reports

All the tags that get created in your DellSuite account can also be searched when fetching a report. These tags can also be searched as a filter in the report.





Kanban Board

Kanban Board is a tool which will give you a descriptive layout of your data in DellSuite based on status and a virtual board.

This board shall consist of cards which represent the various Documents listed in a particular Document Type aligned as per the stage of operation of the transactions represented by Status Columns. The card status can be changed easily by dragging and dropping the cards across the board.

A Kanban Board helps to visualize, control and optimize work-flow while collaborating with the entire team on a real-time basis.

Adding new Card/Document

To add Cards on Kanban Board click Add Tasks. You can Edit card details by click on the card and it will take you to the Task Doctype where you can further add and edit card details.

Update Cards/Document Status

Based on the Task status you can drag and drop the cards in the respective column. For example, if the task is work in progress you can move the card for the task from the status Open to Working.

Manage Columns

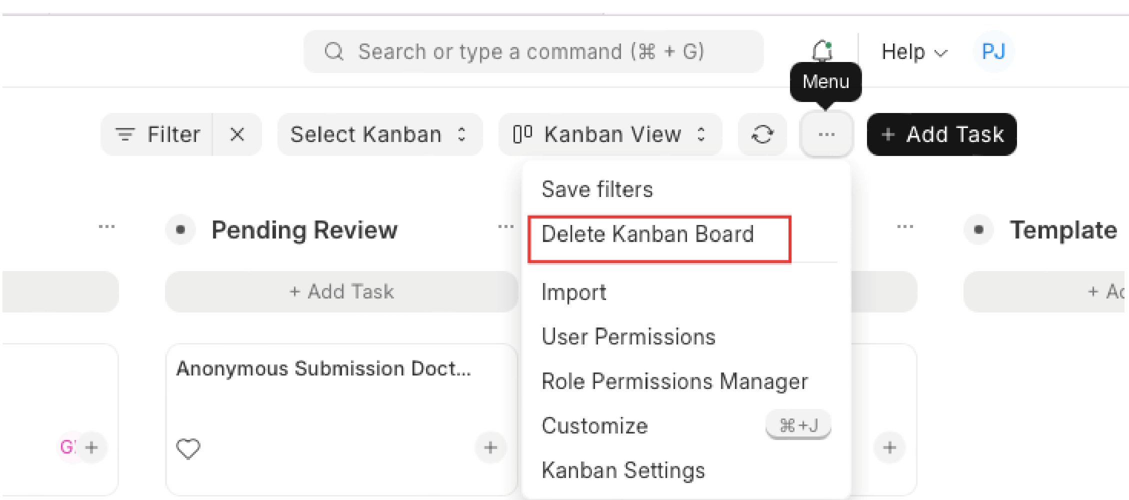
To add more columns in the Kanban board click on Add columns. You can also assign colors to columns. You can also Archive and Restore the columns added in a Kanban board. To do so click Archive in the drop-down menu on the card. Once archived you can restore the column from the list of the archived columns in the Kanban board.

Filters

You can create multiple Kanban Boards based on different filters. To save filters for a Kanban Board, click on Menu and then "Save filters".

Deleting a Kanban Board

The menu provides an option for the user to delete the Kanban Board.



Collaborating Around Forms

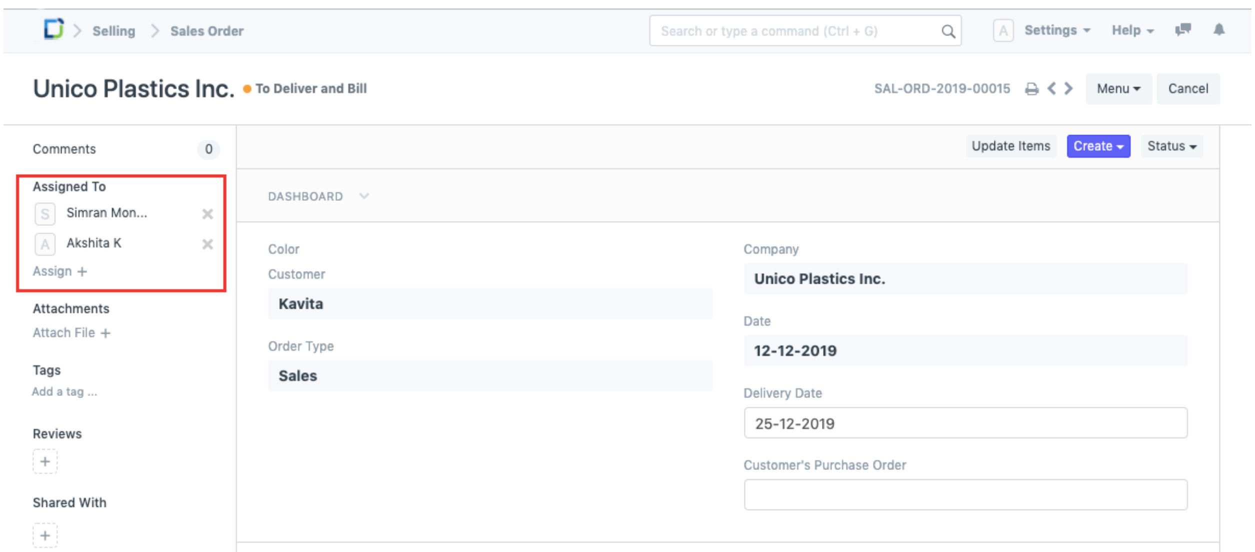
In DellSuite, every form comes with certain tools embedded in the system which allows you to collaborate with other users within your account to have quick and transparent operations.

Following are the tools in each document using which you can collaborate with other Users in your DellSuite account.

Assigned to

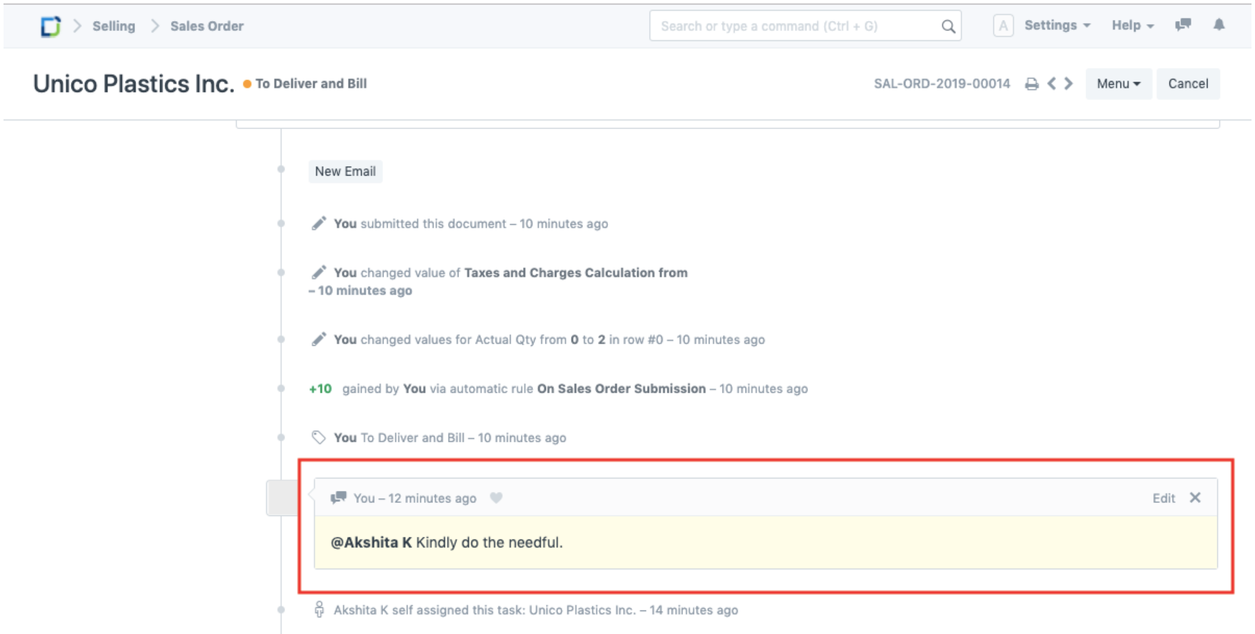
If a Document requires some action from a particular user, you can assign that document to that User. On assignment, the user shall be intimated of the same via an email. Click here to learn more about this feature.

E.g., an incoming Lead can e assigned to a particular user to ensure that the same is being pursued by them.



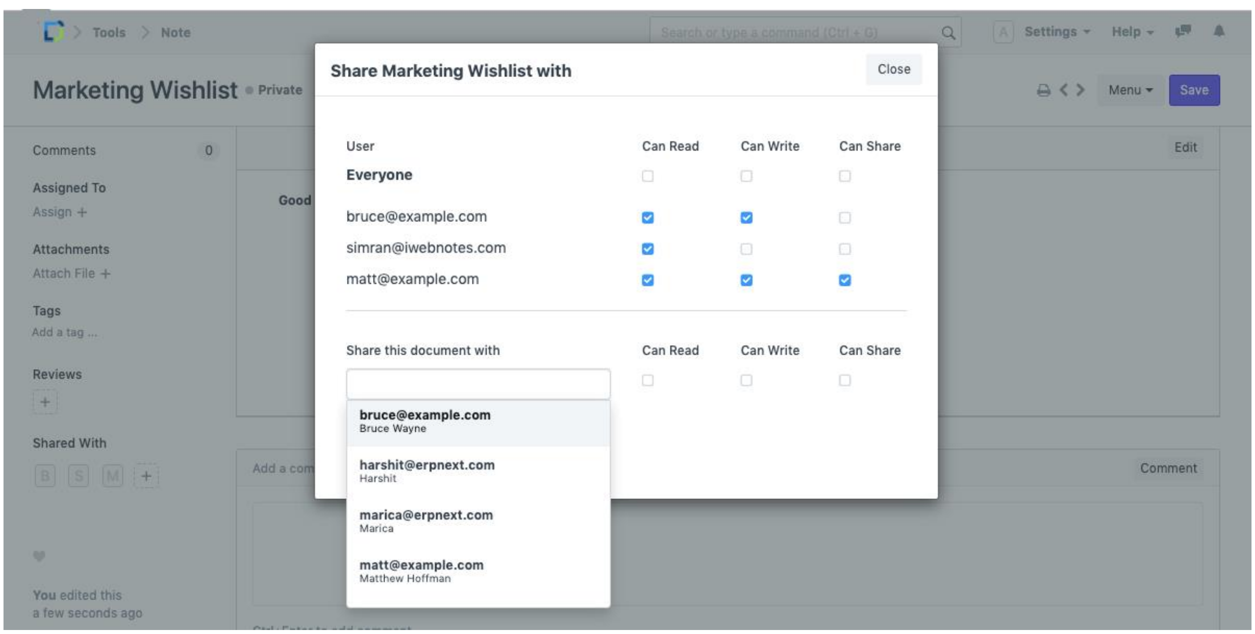
Comments

For a lot of Documents, there can be information that is not a part of the transaction. To record such information, the 'Comments' feature is a great alternative. Checkout Comments for more.



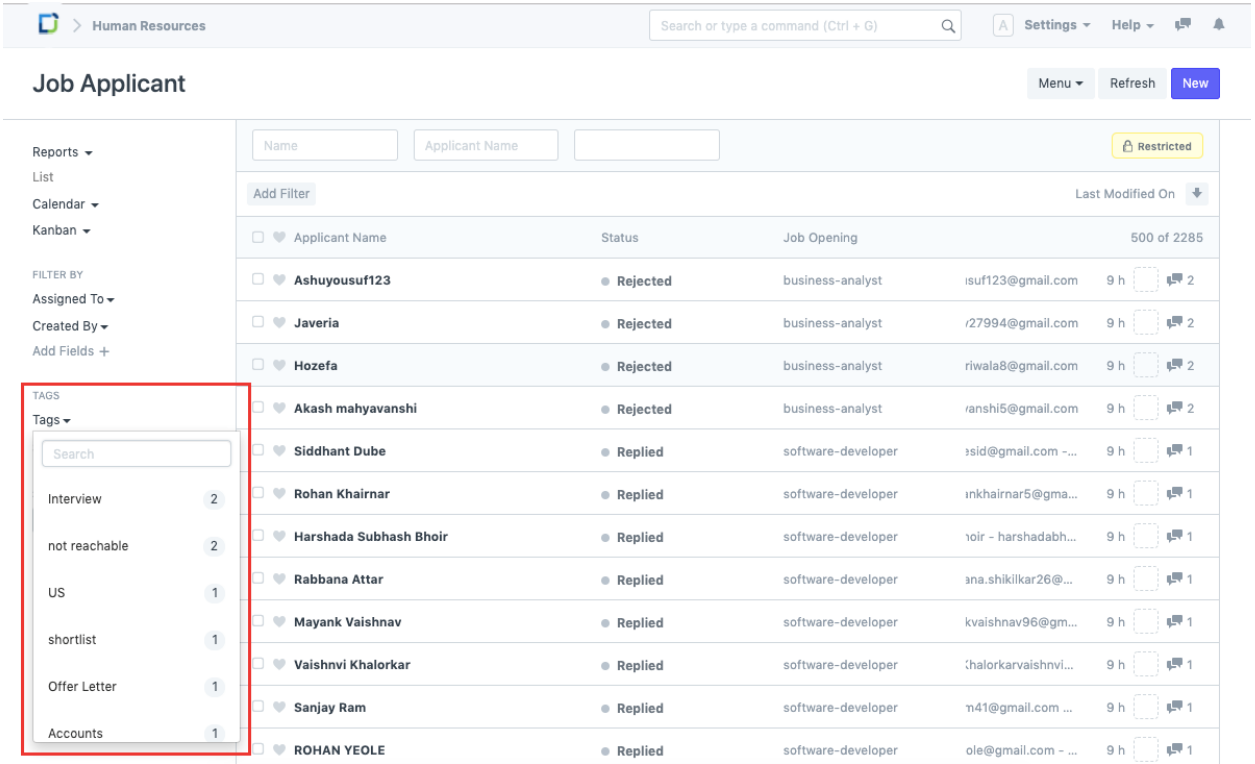
Share

You can share a document with the aspecific user in your DellSuite account. Irrespective of their roles or permissions, a User will be able to access a document shared with them.



Tags

You can also add tags to different Documents to classify them into categories. Click here to know more about tags.



Reviews

For every Document, there is an option to add Reviews for any User involved in the Document. This includes all the Users to whom this Document was assigned, and to all the Users who have Commented on this Document. Review Points can be gained by a User using the Energy Point System.