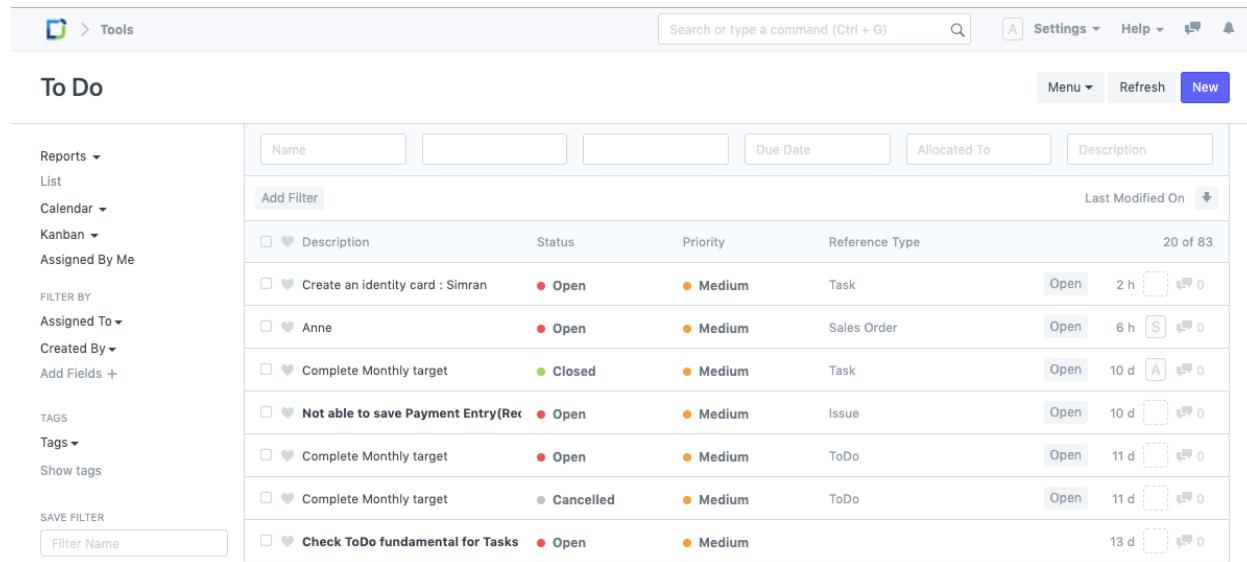


Tools

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.



The screenshot shows the DellSuite Tools interface with the 'ToDo' list. The left sidebar contains filters for Reports, List, Calendar, Kanban, Assigned By Me, Assigned To, Created By, and Tags. The main area shows a table of ToDo items with columns for Name, Status, Priority, Reference Type, and Due Date. The table includes a header row and 8 data rows. The data rows show various tasks assigned to different users (Simran, Anne) with different statuses (Open, Closed, Cancelled) and priorities (Medium). Each row includes a 'Details' button and a 'Delete' button.

Name	Status	Priority	Reference Type	Due Date	Allocated To	Description
Create an identity card : Simran	Open	Medium	Task	Open	2 h	
Anne	Open	Medium	Sales Order	Open	6 h	
Complete Monthly target	Closed	Medium	Task	Open	10 d	
Not able to save Payment Entry(Rec	Open	Medium	Issue	Open	10 d	
Complete Monthly target	Open	Medium	ToDo	Open	11 d	
Complete Monthly target	Cancelled	Medium	ToDo	Open	11 d	
Check ToDo fundamental for Tasks	Open	Medium			13 d	

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

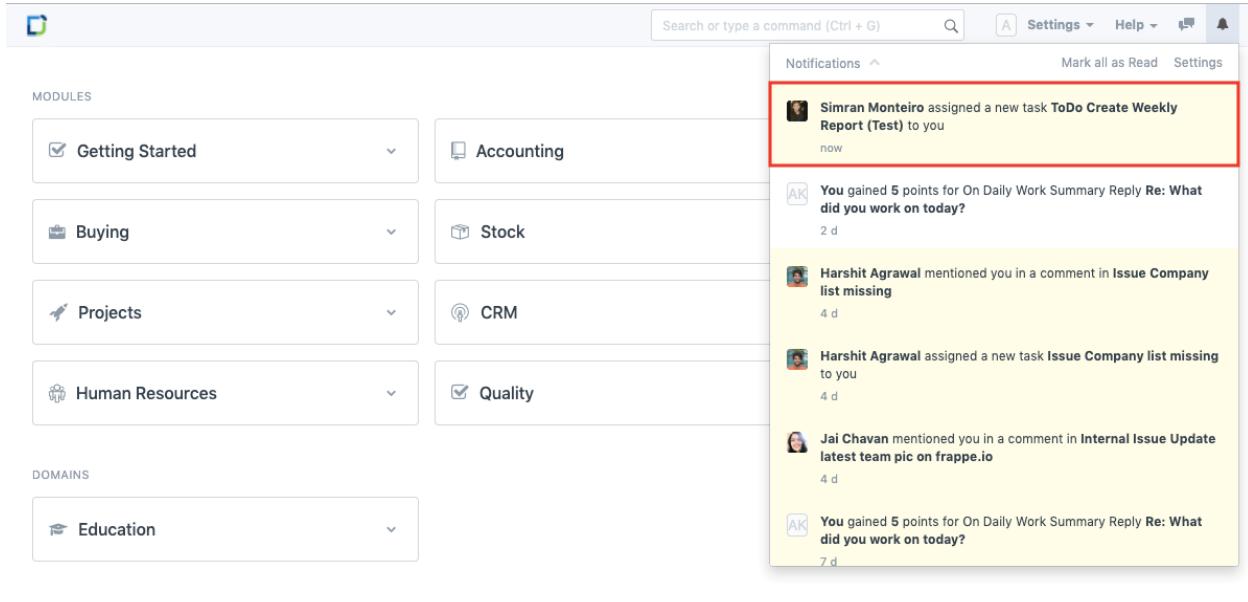
1. How to create a ToDo

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.



The screenshot shows the DellSuite application interface. On the left, there are sections for 'MODULES' (Getting Started, Accounting, Buying, Stock, Projects, CRM, Human Resources, Quality) and 'DOMAINS' (Education). On the right, there is a 'Notifications' panel. The top of the notifications panel has a search bar, settings, and a help button. Below the search bar, there are buttons for 'Mark all as Read' and 'Settings'. The notifications list includes the following items:

- Simran Monteiro assigned a new task ToDo Create Weekly Report (Test) to you** (now)
- AK You gained 5 points for On Daily Work Summary Reply Re: What did you work on today?** (2 d)
- Harshit Agrawal mentioned you in a comment in Issue Company list missing** (4 d)
- Harshit Agrawal assigned a new task Issue Company list missing to you** (4 d)
- Jai Chavan mentioned you in a comment in Internal Issue Update latest team pic on frappe.io** (4 d)
- AK You gained 5 points for On Daily Work Summary Reply Re: What did you work on today?** (7 d)

1.1. Additional Options while creating a ToDo

- 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.
- Priority:** You can define the Priority of this task as Low, Medium or High.
- 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.
- Due Date:** You can add the Due Date to all the ToDos.
- Allocated To:** In cases where you are assigning a ToDo to another DellSuite User, you can do so here.

Comments 0

Assigned To
Bruce Wayn...

Attachments
Attach File +

Tags
Add a tag ...

Reviews
+

Shared With
+

Status
Open

Priority
Medium

Color
#a83333

Due Date
16-12-2019

Allocated To
bruce@example.com

Description
Create an identity cad: Jane Doe

1.2. References

Every Document in DellSuite has an option called 'Assign To' in the side-bar. Using this option, any Document 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 a ToDo via another Document Type, the name of the person making the assignment also gets tagged.

Search or type a command (Ctrl + G)

Settings Help

Not able to save Payment Entry(Receipt) • Open

REFERENCE

Role

Assigned By

Assigned By Full Name

Reference Type
Issue

Reference Name
ISS-2019-00002

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'.

Not able to save Payment Entry(Receipt) • Open

Comments	0	ISS-2019-00002	Close	New
Assigned To				
Attachments				
Tags				
Reviews				
Status	<input checked="" type="checkbox"/> Open <input type="checkbox"/> Closed <input type="checkbox"/> Cancelled <input type="checkbox"/> Medium			
Color				
Due Date	02-12-2019			
Allocated To	akshita@erpnext.com			

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

Tools
Search or type a command (Ctrl + G)
Settings ▾
Help ▾
Menu ▾
Refresh
New

Notes

List

Calendar ▾

Kanban ▾

FILTER BY

Assigned To ▾

Created By ▾

Add Fields +

TAGS

Tags ▾

Show tags

SAVE FILTER

Filter Name

Name

Add Filter

Last Modified On ▾

□ ❤️ Name	Status	Title	20 of 91
□ ❤️ How to write Open Day Blog	● Public	How to write Open Day Blo...	9 d 0
□ ❤️ Conference 2019 Review	● Public	Conference 2019 Review	2 M 0
□ ❤️ Conf 2019 Day 3	● Public	Conf 2019 Day 3	2 M 0
□ ❤️ Frappe Technologies Pvt Ltd "Assets"	● Public	Frappe Technologies Pvt L...	2 M 0
□ ❤️ Conf Sprint Talks	● Public	Conf Sprint Talks	2 M 0
□ ❤️ Testing	● Public	Testing	2 M 5
□ ❤️ Design Resources	● Public	Design Resources	3 M 0
□ ❤️ Invitees for TALKS	● Public	Invitees for TALKS	3 M 0
□ ❤️ SX4 Sept 11th 2019	● Public	SX4 Sept 11th 2019	3 M 0
□ ❤️ Conference 2019 Agenda	● Public	Conference 2019 Agenda	3 M 0
□ ❤️ Conf2019 Frappe Talks	● Public	Conf2019 Frappe Talks	3 M 0
□ ❤️ Implementation Review Sept #01	● Public	Implementation Review Se...	3 M 0

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.

Marketing Wishlist

Good to have stuff

- Ability to take surveys
- Capture source of the signup
- Monthly/Quarterly newsletters?
- Feedback survey for:
 - after people pay for subscription
 - When they do not renew
- Blogs: allow for CTA on blogs. Reduce empty space. Show 2 - 3 related blogs so user stick on the site.
- Social share buttons

Help: To link to another record in the system, use "#Form/Note/[Note Name]" as the Link URL. (don't use "http://")

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.

Marketing Wishlist

Good to have stuff

- Ability to take surveys
- Capture source of the signup
- Monthly/Quarterly newsletters?
- Feedback survey for:
 - after people pay for subscription
 - When they do not renew
- Blogs: allow for CTA on blogs. Reduce empty space. Show 2 - 3 related blogs so user stick on the site.
- Social share buttons

Marketing Wishlist 3 m 0

Grocery List 2 d 0

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

Open Discussion at 4 p.m. • Public

File < > Menu Save

The screenshot shows a note titled "Open Discussion at 4 p.m." with the "Public" visibility option selected. A red box highlights the "Notify users with a popup when they log in" checkbox, which is checked. Below it is another checkbox for "Notify Users On Every Login" which is unchecked. A text input field for "Expire Notification On" contains the date "16-12-2019". The note content area contains the text "At 6th floor cafeteria. Snacks on the house)". The left sidebar includes options for Comments, Assigned To, Attachments, Tags, Reviews, and Shared With.

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.

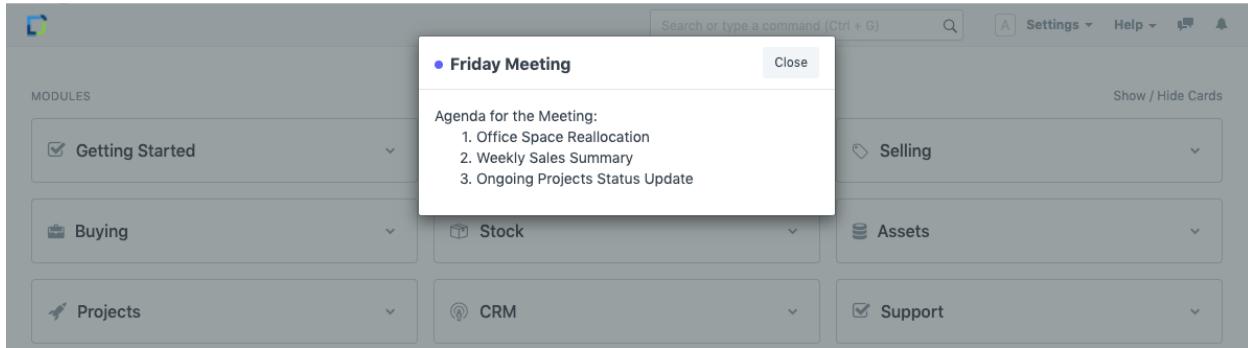
The screenshot shows a note titled "Marketing Wishlist" with the "Private" visibility option selected. A modal window titled "Share Marketing Wishlist with" is open, showing sharing options for "Everyone" and individual users. The "Everyone" row has checkboxes for "Can Read", "Can Write", and "Can Share", all of which are unchecked. Below this, a list of users is shown with checkboxes for "Can Read", "Can Write", and "Can Share":

User	Can Read	Can Write	Can Share
bruce@example.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
simran@iwebnotes.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
matt@example.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The note content area contains the text "Good". The left sidebar includes options for Comments, Assigned To, Attachments, Tags, Reviews, and Shared With.

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.

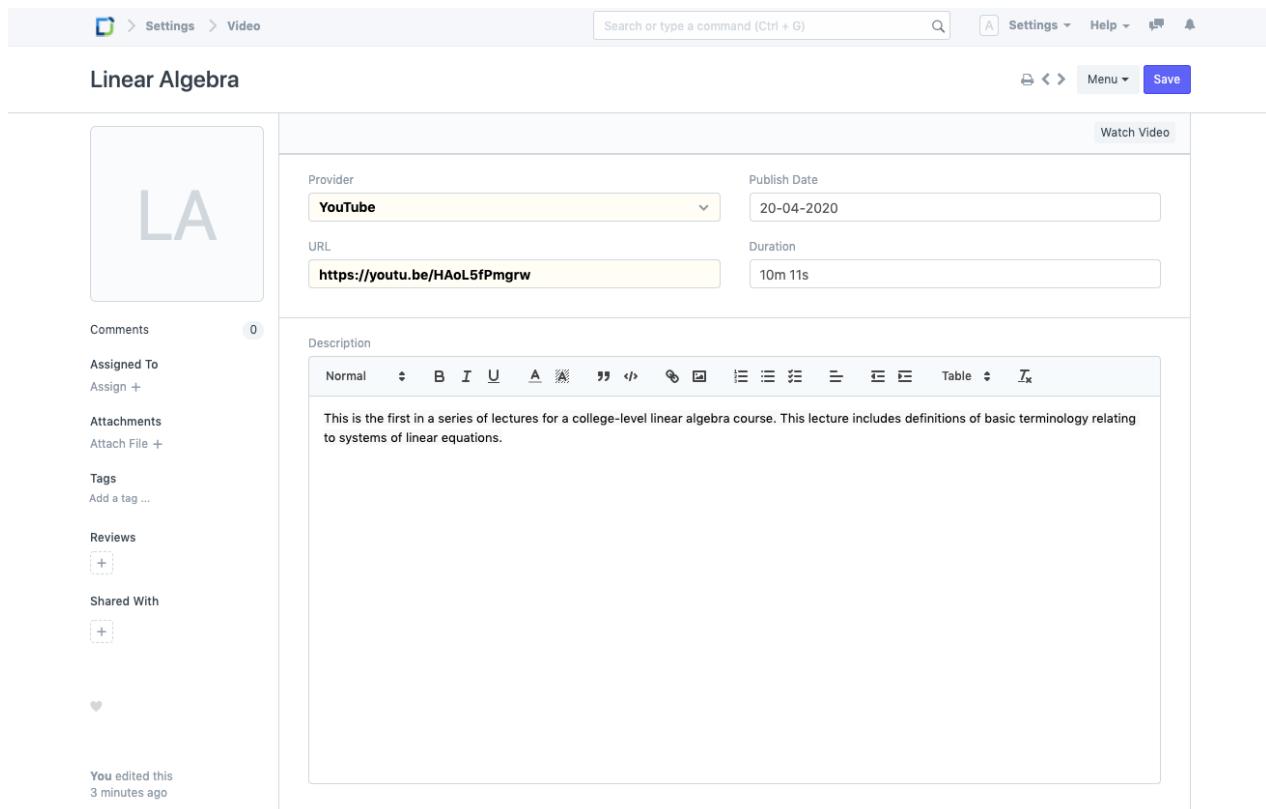
To access Videos, go to:

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/thumb nail for the Video.



The screenshot shows a document editor interface with a sidebar on the left and a main content area on the right. The sidebar contains sections for Comments (0), Assigned To, Attachments, Tags, Reviews, and Shared With. The main content area shows a video provider set to YouTube, with a URL of <https://youtu.be/HAoL5fPmgrw>. The video has a publish date of 20-04-2020 and a duration of 10m 11s. The description text is: "This is the first in a series of lectures for a college-level linear algebra course. This lecture includes definitions of basic terminology relating to systems of linear equations." There is a "Watch Video" button in the top right corner of the content area. A message at the bottom left of the content area says "You edited this 3 minutes ago".

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.



The screenshot shows the "Video Settings" page with a "Not Saved" status. It includes sections for Comments (0), Assigned To, Attachments, Tags, and Reviews. The main area has a "Enable YouTube Tracking" checkbox which is checked, and below it are fields for "API Key" (a redacted input field) and "Frequency" (set to "30 mins"). There are "Menu" and "Save" buttons in the top right corner.

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.

Linear Algebra

Watch Video

Provider: YouTube | Publish Date: 20-04-2020 | URL: <https://youtu.be/HAoL5fPmgrw> | Duration: 10m 12s

Comments: 0

Assigned To: Assign +

Attachments: algebra.png | Attach File +

Tags: Add a tag ...

Reviews: +

Shared With: +

Heart icon

You edited this just now

You created this 1 hour ago

YOUTUBE STATISTICS

Likes	Dislikes
481	6

Views	Comments
54,219	29

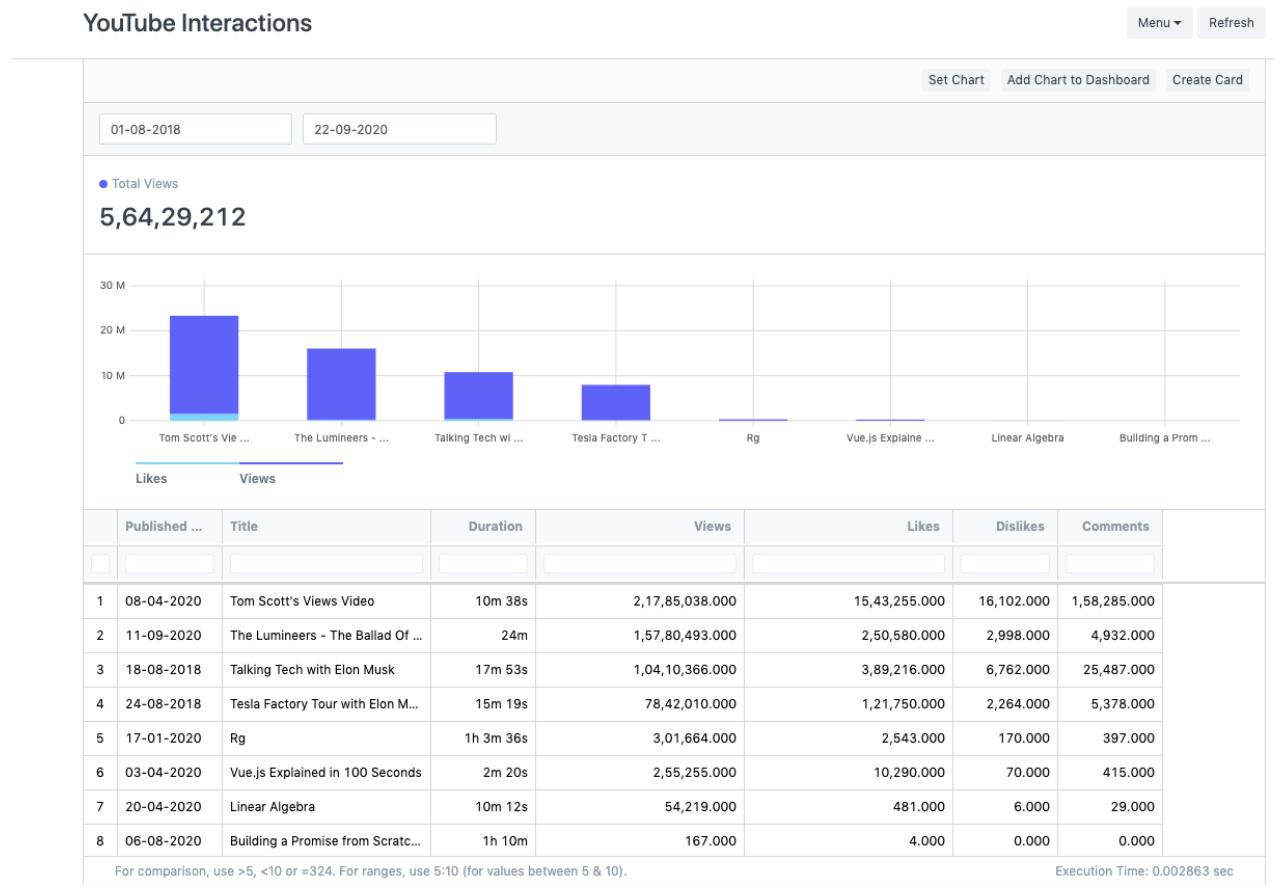
Description:

This is the first in a series of lectures for a college-level linear algebra course. This lecture includes definitions of basic terminology relating to systems of linear equations.

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.



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.

Event Calendar

Menu  Refresh 

Calendar 		December 2019							 today    	
		SUN	MON	TUE	WED	THU	FRI	SAT		
		1	2	3	4	5	6	7		
				3:33a Birthday: Jan						
		8	9	10	11	12	13	14		
			9a Company Audits		9a Meeting with California clients					
		15	16	17	18	19	20	21		
			Meeting with California clients			9a Monthly Reportin				
		22	23	24	25	26	27	28		
				9a Merry Christmas			3:33a Birthday: Mat			
		29	30	31	1	2	3	4		

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.

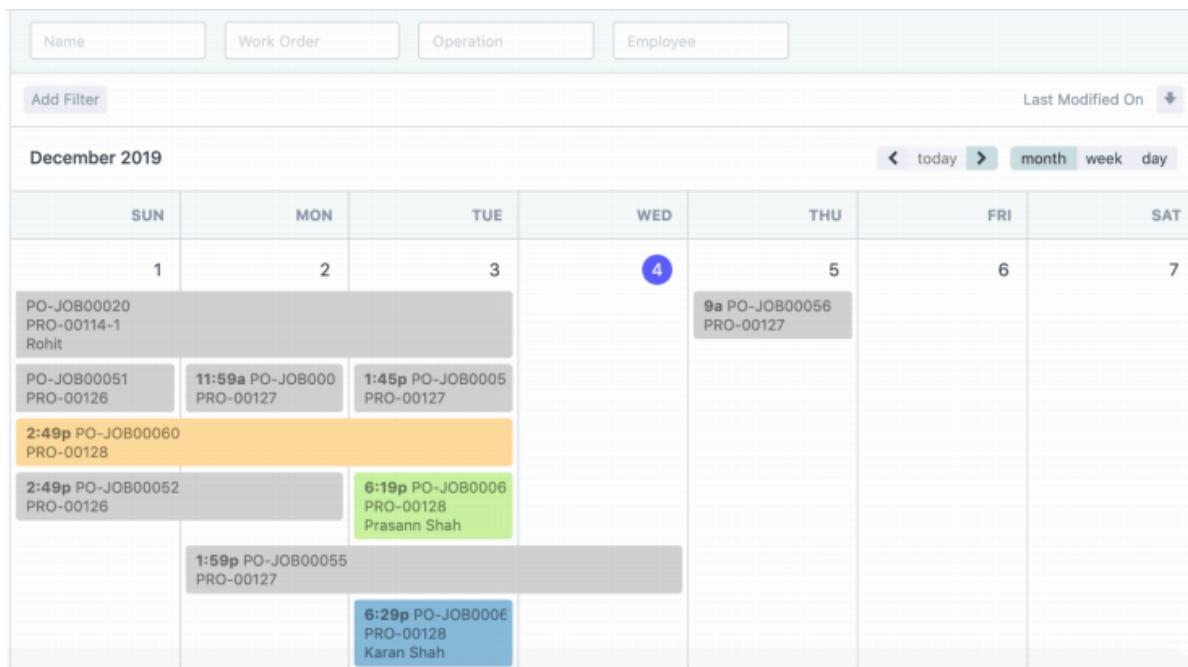
1.1. Event Based on a Lead

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.

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Reviews +</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Shared With +</div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">FOLLOW UP</div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;">Next Contact By</div> <div style="width: 45%;">Next Contact Date</div> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">bruce@example.com</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">28-12-2019 12:24:28</div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;">Ends On</div> <div style="width: 45%;">28-12-2019 13:24:28</div> </div>
---	--

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

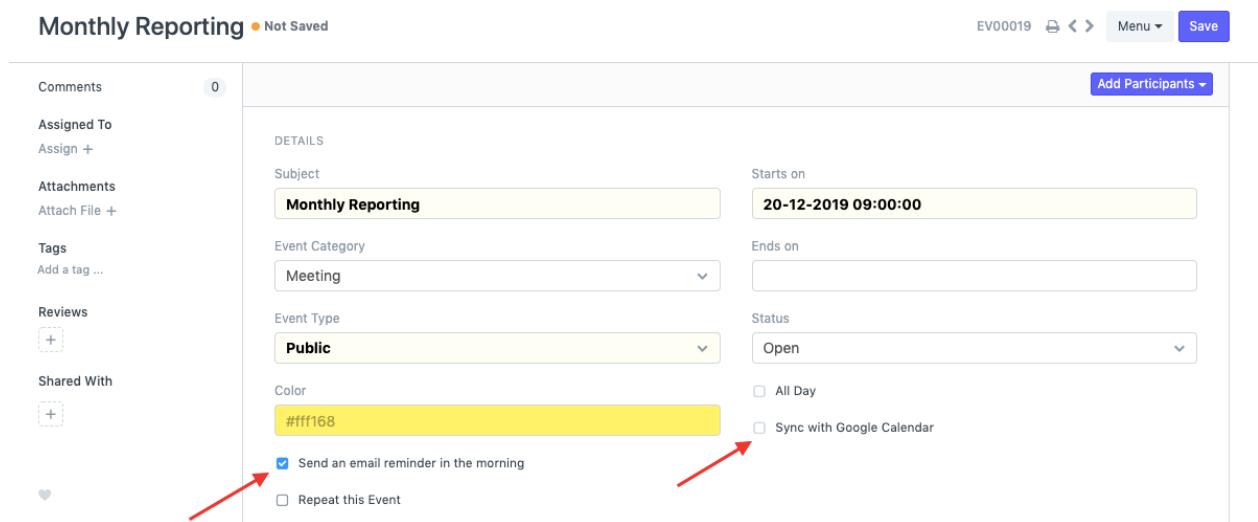
You can also enter the last day of the repeated occurrence in the 'Repeat Till' field. In case of infinite repetitions, you may choose to leave this field blank.

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.



Monthly Reporting • Not Saved

EV00019 Save

Comments 0 Add Participants

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

Starts on 20-12-2019 09:00:00

Ends on

Event Category Meeting

Event Type Public

Status Open

Color #ffff168

Send an email reminder in the morning

Repeat 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

Email Digest

Menu ▾ Refresh New

Reports ▾		Name	For Company					Restricted
List		Add Filter						Last Modified On
Calendar ▾								
Kanban ▾								
FILTER BY		<input type="checkbox"/> Name	Status	Enabled	For Company	How frequently?		5 of 5
Assigned To ▾		<input type="checkbox"/> Open Tickets	<input checked="" type="radio"/> Enabled	✓	Frappe Technol...	<input checked="" type="radio"/> Daily	Open Tickets	2 y 0
Created By ▾		<input type="checkbox"/> Default Weekly Digest - We	<input type="radio"/> Disabled	✗	Frappe Technol...	<input checked="" type="radio"/> Weekly	t - Web Notes Te...	5 y 0
Add Fields +		<input type="checkbox"/> Default Weekly Digest - Fra	<input checked="" type="radio"/> Enabled	✓	Frappe Technol...	<input checked="" type="radio"/> Weekly	t - Frappe Techn...	5 y 0
TAGS		<input type="checkbox"/> Daily Digest	<input checked="" type="radio"/> Enabled	✓	Frappe Technol...	<input checked="" type="radio"/> Daily	Daily Digest	6 y 0
Tags ▾		<input type="checkbox"/> Monthly Email Digest	<input checked="" type="radio"/> Enabled	✓	Frappe Technol...	<input checked="" type="radio"/> Monthly	onthly Email Digest	6 y 0

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,

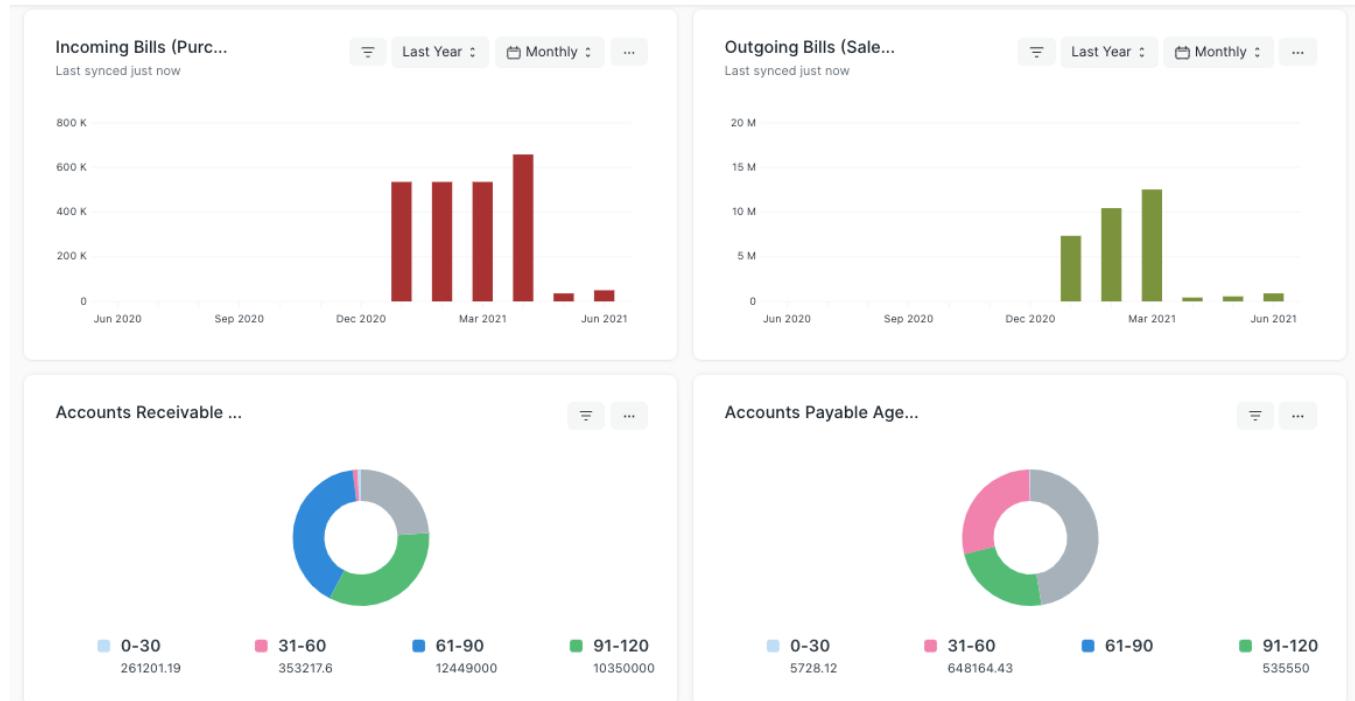
Home > Customization > Dashboards > Dashboard

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.

Accounts Dashboard



2. Adding Charts to Dashboard

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

Accounts Detailed • Not Saved

Show Dashboard Save

Assigned To

Attachments Attach File

Reviews

Shared With

Tags Add a tag ...

0 0 FOLLOW

You edited this just now

You created this just now

Is Default

Is Standard

Charts

No.	Chart	Width	Actions
1	Profit and Loss	Full	
2	Chart	Half	

Add Row **Category-wise Asset Value**

Chart Options **Location-wise Asset Value**

1 | **Asset Value Analytics**

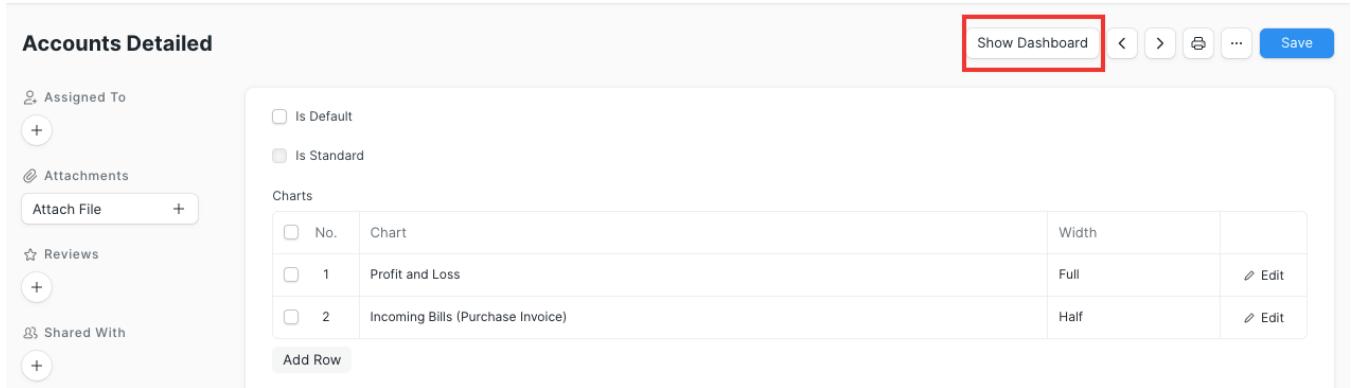
Program wise Fee Collection

Oldest Items

Job Application Status

Instructor Gender Diversity Ratio

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



The screenshot shows the 'Accounts Detailed' dashboard configuration. On the left, there are sections for 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews' (with an 'Add' button), and 'Shared With' (with an 'Add' button). On the right, there are checkboxes for 'Is Default' and 'Is Standard'. Below these are sections for 'Charts' and 'Dashboard'. The 'Charts' section contains a table:

No.	Chart	Width	Actions
1	Profit and Loss	Full	
2	Incoming Bills (Purchase Invoice)	Half	

Buttons for 'Add Row' and 'Save' are at the bottom.

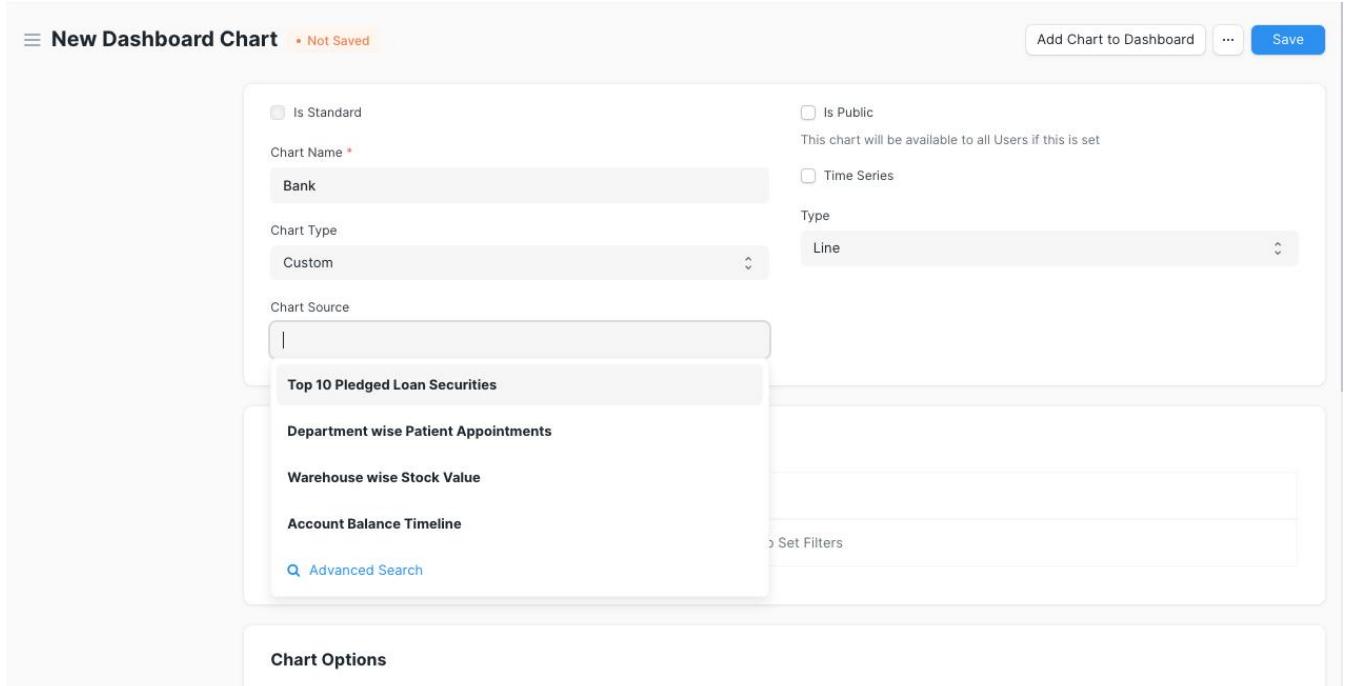
3. Creating a New Dashboard Chart

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.



The screenshot shows the 'New Dashboard Chart' creation screen. The 'Chart Name' is 'Bank'. The 'Chart Type' is 'Custom'. The 'Type' is 'Line'. The 'Chart Source' dropdown is open, showing options: 'Top 10 Pledged Loan Securities', 'Department wise Patient Appointments', 'Warehouse wise Stock Value', and 'Account Balance Timeline'. A 'Set Filters' button is also visible. At the top right, there are buttons for 'Add Chart to Dashboard', '...', and 'Save'.

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

Click the table to edit filters.

You edited this

You created this 1 minute ago

Filters

Filter	Condition	Value
status	not in	Draft,Cancelled,Stopped,
docstatus	=	1
transaction_date	Timespan	last quarter

Click table to edit

Add Chart to Dashboard Save

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

You edited this 5 minutes ago

You created this 7 minutes ago

Material Planning

Filters

Filter	Condition	Value
Status	Not In	Draft,Cancelled,Stoppe values separated by commas
Document Status	Equals	Submitted
Transaction Date	Timespan	Last Quarter
Purpose	Equals	<input checked="" type="checkbox"/> Purchase Material Transfer Material Issue Manufacture Customer Provided

+ Add a Filter

Set

Chart Options

Custom Options

1

Color Choose a color

Import to Dashboard Help BS

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

The screenshot shows the configuration interface for a chart. On the left, a sidebar indicates "You edited this" and "You created this 7 minutes ago". The main area is divided into two sections: "Filters" and "Chart Options".

Filters table:

Filter	Condition	Value
status	not in	Draft,Cancelled,Stopped,
docstatus	=	1
transaction_date	Timespan	last quarter
material_request_type	=	Purchase

Click table to edit

Chart Options

Custom Options: 1

Color: Choose a color

Saved

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.

The screenshot shows the configuration form for a chart. The fields are as follows:

- Is Standard
- Is Public: This chart will be available to all Users if this is set
- Chart Name: Count Todo
- Chart Type: Count
- Document Type: ToDo
- Time Span: Last Year
- Time Interval: Yearly
- Time Series
- Type: Line
- Time Series Based On: Created 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).

Is Standard

Chart Name *

Chart Type

Document Type

Parent Document Type

The document type selected is a child table, so the parent document type is required.

Is Public

This chart will be available to all Users if this is set

Timespan

Time Interval

Time Series

Type

Time Series Based On

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

Is Standard

Chart Name *

Chart Type

Document Type

Time Series Based On

Value Based On

Is Public

This chart will be available to all Users if this is set

Timespan

Time Interval

Time Series

Type

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.

Is Standard

Chart Name *

Group By Chart

Chart Type

Group By

Document Type

ToDo

Group By Type

Count

Group By Based On

Created By

Number of Groups

3

Is Public

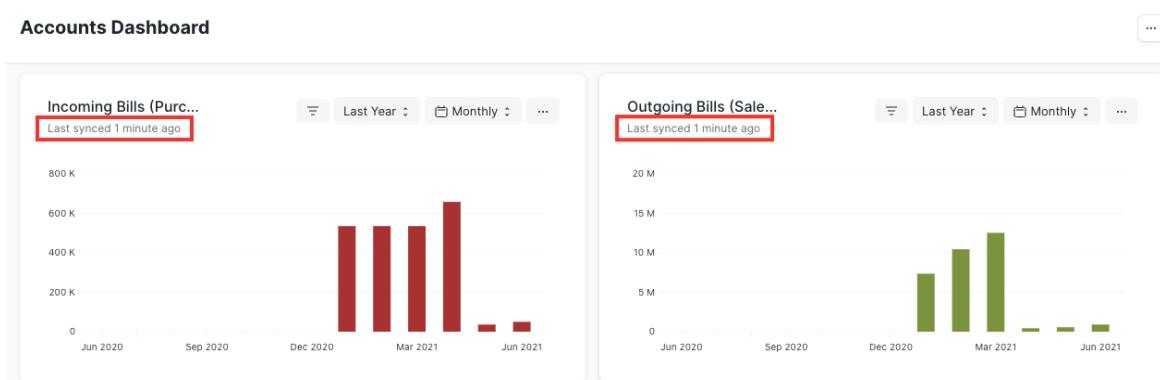
This chart will be available to all Users if this is set

Type

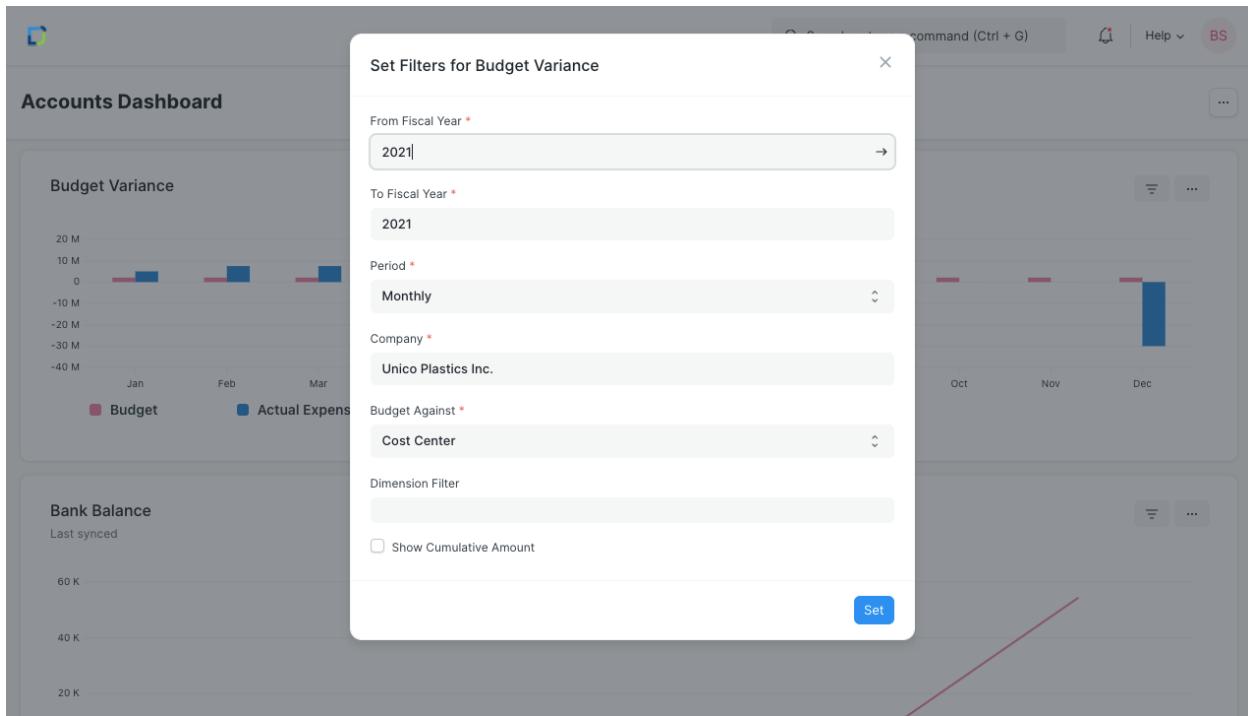
Line

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).

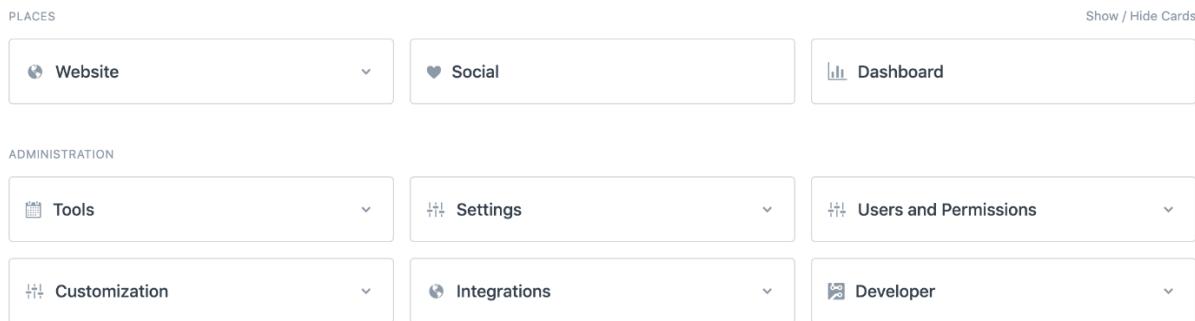
- Input 'foo & bar" can return any docs with both tags foo and bar assigned. (special long text field _usertags).

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.

MODULES

Show / Hide Cards

Accounting

Sales Invoice
Customer
Purchase Invoice
Supplier
Company
Customize

Getting Started

Buying

Stock

Assets

Selling

Projects

CRM

Support

Human Resources

Quality

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.

Accounting

Accounts Receivable

- Sales Invoice
- Customer
- Payment Entry
- Payment Request
- Accounts Receivable
- Accounts Receivable Summary
- Sales Register
- Item-wise Sales Register
- Ordered Items To Be Billed
- Delivered Items To Be Billed

Accounts Payable

- Purchase Invoice
- Supplier
- Payment Entry
- Accounts Payable
- Accounts Payable Summary
- Purchase Register
- Item-wise Purchase Register
- Purchase Order Items To Be Billed
- Received Items To Be Billed

Accounting Masters

- Company
- Chart of Accounts
- Accounts Settings
- Fiscal Year
- Accounting Dimension
- Finance Book
- Accounting Period
- Payment Term

Banking and Payments

- Match Payments with Invoices
- Update Bank Transaction Dates
- Invoice Discounting
- Bank Reconciliation Statement
- Bank Clearance Summary
- Bank Guarantee
- Cheque Print Template

General Ledger

- Journal Entry
- General Ledger
- Customer Ledger Summary
- Supplier Ledger Summary

Taxes

- Sales Taxes and Charges Template
- Purchase Taxes and Charges Template
- Item Tax Template
- Tax Category
- Tax Rule
- Tax Withholding Category

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.

The image shows three separate windows or panels, each representing a different module in a system. The first window is titled 'Accounts Receivable' and contains links for 'Sales Invoice' (orange dot) and 'Customer' (orange dot). A tooltip 'You need to create these first: Sales Invoice' points to the 'Sales Invoice' link. The second window is titled 'Accounts Payable' and contains links for 'Purchase Invoice' (orange dot) and 'Supplier' (orange dot). The third window is titled 'Accounting Masters' and contains links for 'Company' (blue dot), 'Chart of Accounts' (blue dot), and several greyed-out links for 'Accounts Settings', 'Fiscal Year', 'Accounting Dimension', 'Finance Book', 'Accounting Period', and 'Payment Term'.

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 image shows three separate windows or panels, each representing a different module in a system. The first window is titled 'Projects' and contains links for 'Project' (red dot) and 'Task' (red dot). The second window is titled 'Time Tracking' and contains links for 'Timesheet' (red dot), 'Activity Type' (blue dot), and 'Activity Cost' (grey dot). The third window is titled 'Reports' and contains links for 'Daily Timesheet Summary' (orange dot) and 'Project wise Stock Tracking' (grey dot).

- 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.

Comments 0
Update Items Create Status

Assigned To Akshita K
Hold Close

Attachments Attach File
Company Unico Plastics Inc.

Tags Add a tag ...
Date 11-12-2019

Reviews +
Delivery Date 31-12-2019

DASHBOARD Color
Customer Kavita

Order Type Sales

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.

Human Resources

Search or type a command (Ctrl + G)

Settings Help

Job Applicant

Menu Refresh New

Reports ▾

List

Calendar ▾

Kanban ▾

FILTER BY

Assigned To ▾

Created By ▾

Add Fields +

TAGS

Tags ▾

Search

Interview 2

not reachable 2

US 1

shortlist 1

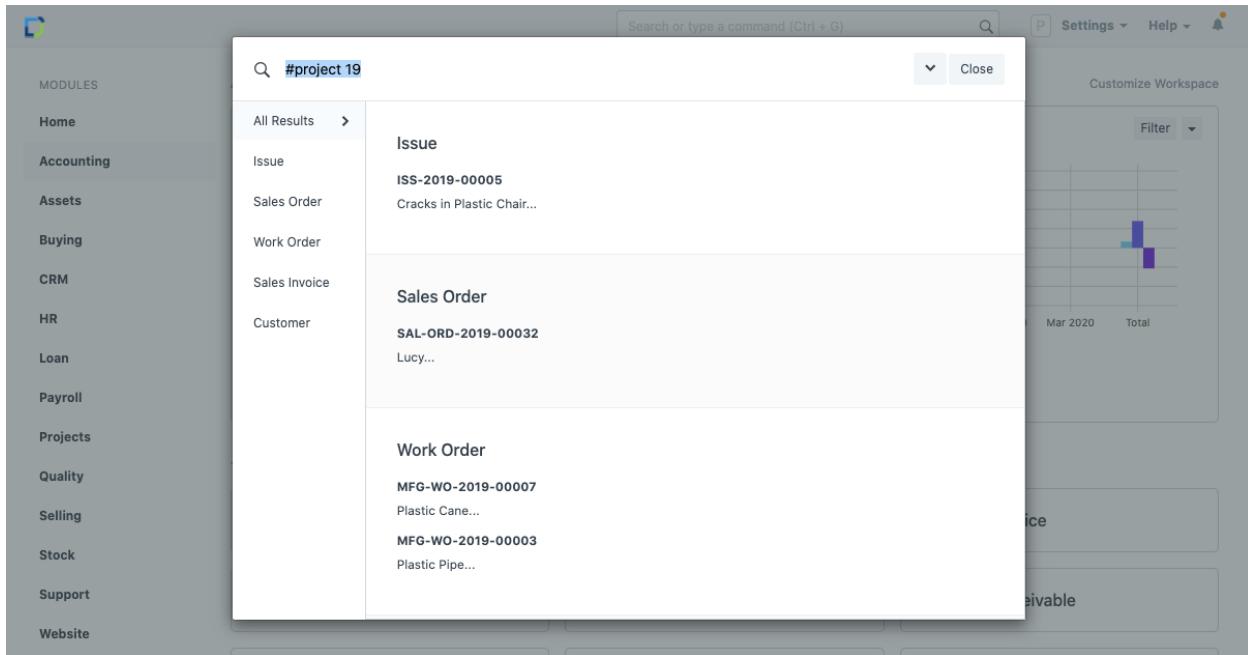
Offer Letter 1

Accounts 1

Name	Applicant Name		Restricted
Add Filter			
Last Modified On			
<input type="checkbox"/> Ashuyousuf123	Status	Job Opening	500 of 2285
<input type="checkbox"/> Javeria	<input type="radio"/> Rejected	business-analyst	isuf123@gmail.com 9 h <input type="button" value="Edit"/> 2
<input type="checkbox"/> Hozefa	<input type="radio"/> Rejected	business-analyst	riwala8@gmail.com 9 h <input type="button" value="Edit"/> 2
<input type="checkbox"/> Akash mahavanshi	<input type="radio"/> Rejected	business-analyst	ravanshi5@gmail.com 9 h <input type="button" value="Edit"/> 2
<input type="checkbox"/> Siddhant Dube	<input type="radio"/> Replied	software-developer	sid@gmail.com ... 9 h <input type="button" value="Edit"/> 1
<input type="checkbox"/> Rohan Khairnar	<input type="radio"/> Replied	software-developer	inkhairnar5@gmail.com 9 h <input type="button" value="Edit"/> 1
<input type="checkbox"/> Harshada Subhash Bhoir	<input type="radio"/> Replied	software-developer	10ir - harshadabhoir ... 9 h <input type="button" value="Edit"/> 1
<input type="checkbox"/> Rabbana Attar	<input type="radio"/> Replied	software-developer	ana.shikilkar26@... 9 h <input type="button" value="Edit"/> 1
<input type="checkbox"/> Mayank Vaishnav	<input type="radio"/> Replied	software-developer	kvaishnav96@gmail.com 9 h <input type="button" value="Edit"/> 1
<input type="checkbox"/> Vaishnvi Khalorkar	<input type="radio"/> Replied	software-developer	khalkarvaishnvi... 9 h <input type="button" value="Edit"/> 1
<input type="checkbox"/> Sanjay Ram	<input type="radio"/> Replied	software-developer	n41@gmail.com ... 9 h <input type="button" value="Edit"/> 1
<input type="checkbox"/> ROHAN YEOLE	<input type="radio"/> Replied	software-developer	ole@gmail.com - ... 9 h <input type="button" value="Edit"/> 1

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.

	ID	Person Name	Tags	Organization ...	Status	Source	Campaign Name	Le...
<input type="checkbox"/>	1	CRM-LEAD-201...	No-reply	,Website Leads		Opportunity		Ad...
<input type="checkbox"/>	2	CRM-LEAD-201...	Harshit	,Cold Leads	abc	Lead		sin...
<input type="checkbox"/>	3	CRM-LEAD-201...	Naresh		xyz	Converted	test	ha...
<input type="checkbox"/>	4	CRM-LEAD-201...	Michelle		Frappe Technolo...	Converted		Ad...
<input type="checkbox"/>	5	CRM-LEAD-201...	Ken Seq	,Cold Leads	ERP NEXT	Lead		Gu...
<input type="checkbox"/>	6	CRM-LEAD-201...	Invitations			Opportunity		Ad...
<input type="checkbox"/>	7	CRM-LEAD-201...	Damien	,Hot Leads,Webs...		Converted		Ad...
<input type="checkbox"/>	8	CRM-LEAD-201...	dhailjd			Converted		Ad...
<input type="checkbox"/>	9	CRM-LEAD-201...	Simran			Lead		Ad...
<input type="checkbox"/>	10	CRM-LEAD-201...	test lead	,Cold Leads		Converted		Ad...
<input type="checkbox"/>	11	CRM-LEAD-201...	Messages-noreply			Opportunity		Ad...

	ID	Subject	Status	Tags	Frappe Suppor...	Priority	Support Le...
<input type="checkbox"/>	1	ISS-2019-07392	Unable to use ERP in Ipad	Closed	,Enhancement	L1	Functional Query
<input type="checkbox"/>	2	ISS-2019-07426	No Subject	Closed	,Enhancements	L1	Functional Query
<input type="checkbox"/>	3	ISS-2019-07418	Picklist does not work correctly IN PRI...	Replied	,Enhancement	L1	Service Request

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

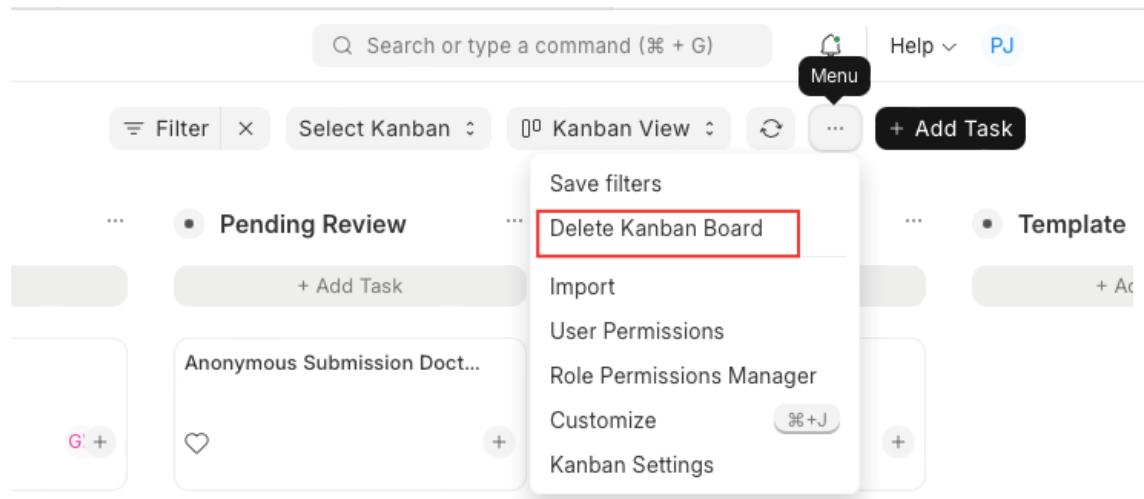
To add more columns in the Kanban board click on Add columns. You can also assign colors to columns. You can also Archive and Restore the columns added in a Kanban board. To do so click Archive in the drop-down menu on the card. Once archived you can restore the column from the list of the archived columns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

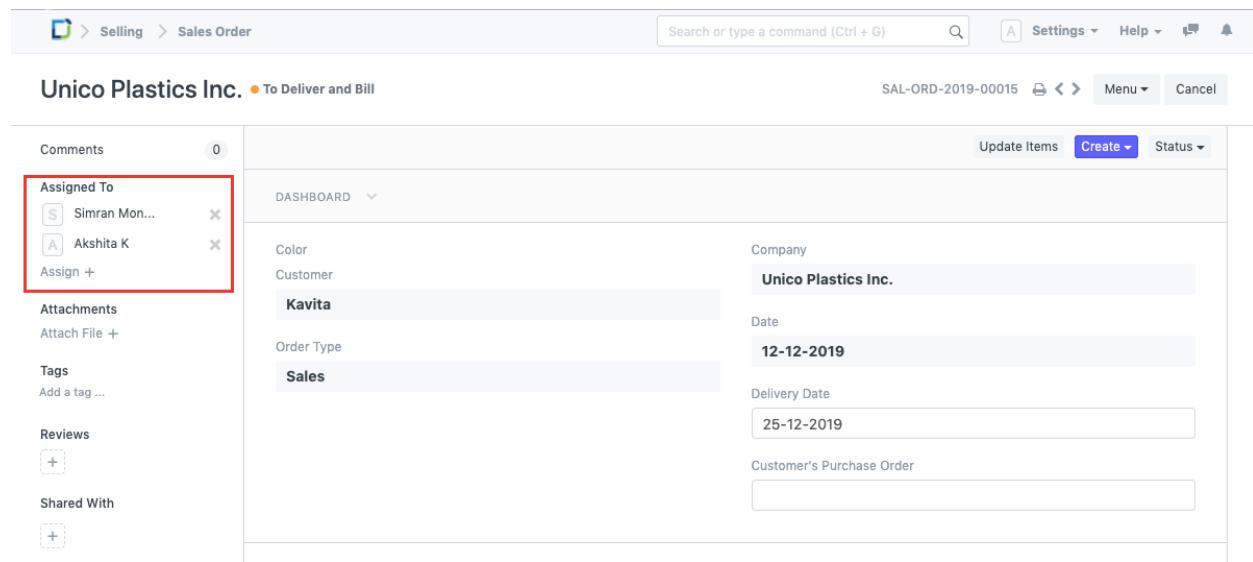
In DellSuite, every form comes with certain tools embedded in the system which allows you to collaborate with other users within your account to have quick and transparent operations.

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.

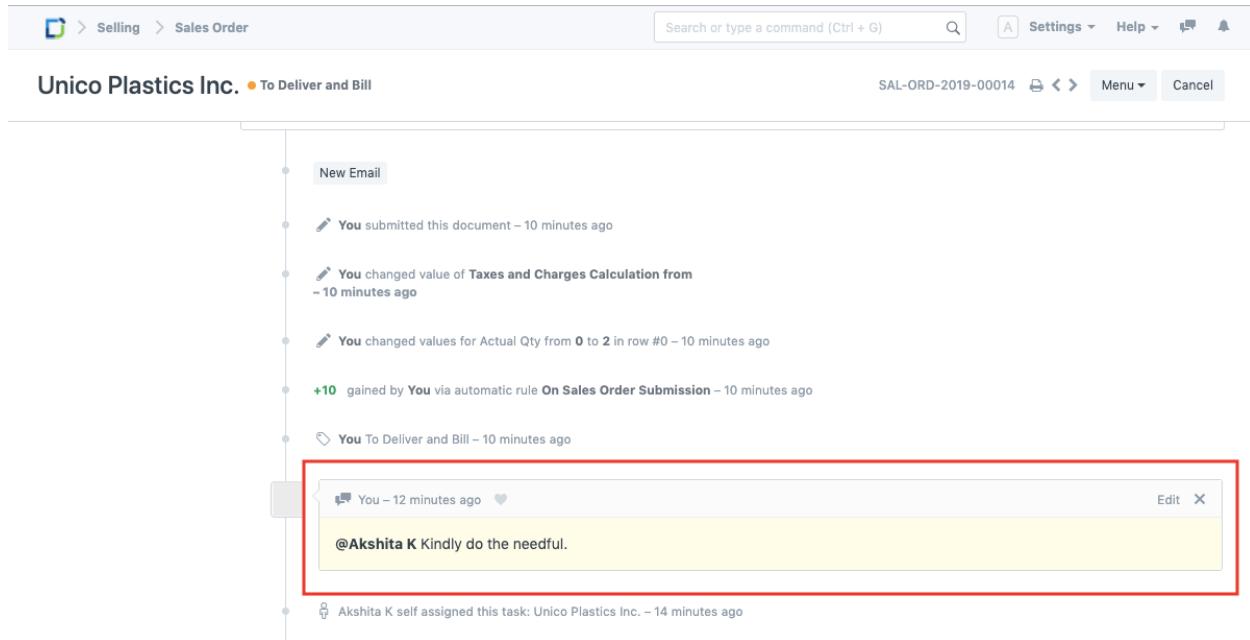
E.g., an incoming Lead can be assigned to a particular user to ensure that the same is being pursued by them.



The screenshot shows the DellSuite Sales Order form for Unico Plastics Inc. The 'Assigned To' section is highlighted with a red box. It lists two users: Simran Mon... and Akshita K, each with a small profile icon and a 'X' to remove the assignment. Below this, there are sections for 'Comments' (0), 'Attachments' (Attach File +), 'Tags' (Add a tag ...), 'Reviews' (+), and 'Shared With' (+). The main form area contains fields for 'DASHBOARD' (Color: Kavita, Customer: Unico Plastics Inc.), 'Order Type' (Sales), and 'Date' (12-12-2019). It also includes 'Delivery Date' (25-12-2019) and 'Customer's Purchase Order' (empty field). The top navigation bar includes 'Search or type a command (Ctrl + G)', 'Settings', 'Help', and 'Menu'.

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.



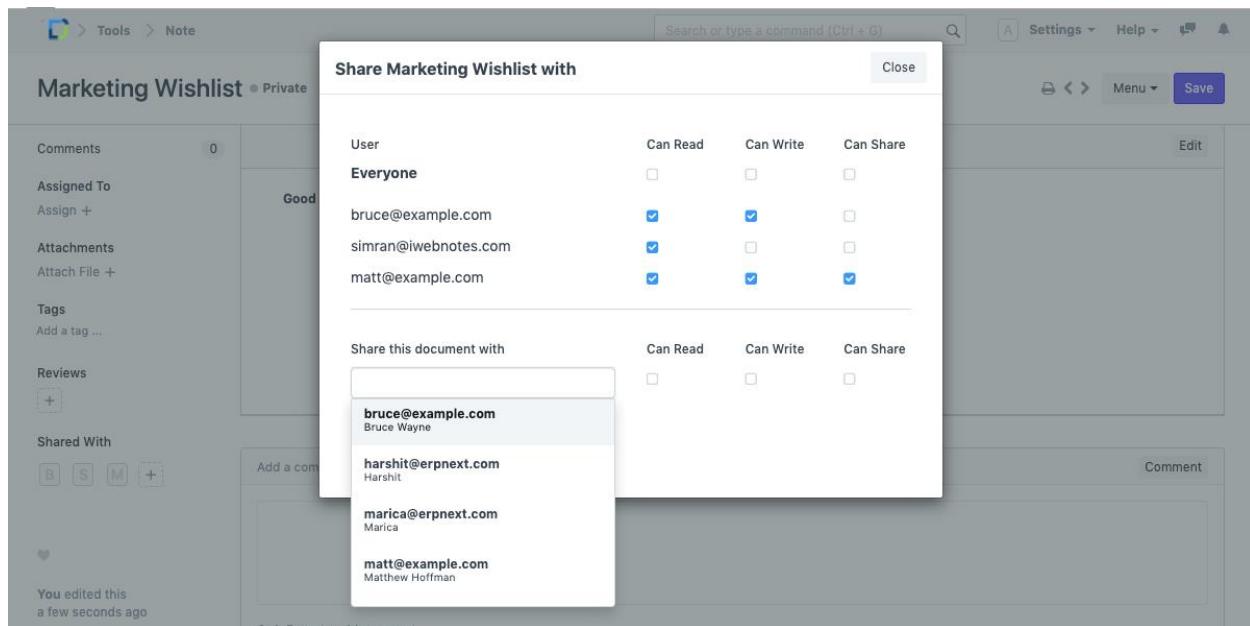
The screenshot shows the Unico Plastics Inc. Sales Order timeline. A note from 'You' to 'Akshita K' is highlighted with a red box. The note content is: '@Akshita K Kindly do the needful.'

Timeline entries:

- New Email
- You submitted this document – 10 minutes ago
- You changed value of Taxes and Charges Calculation from – 10 minutes ago
- You changed values for Actual Qty from 0 to 2 in row #0 – 10 minutes ago
- +10 gained by You via automatic rule On Sales Order Submission – 10 minutes ago
- You To Deliver and Bill – 10 minutes ago
- You – 12 minutes ago
- @Akshita K Kindly do the needful.
- Akshita K self assigned this task: Unico Plastics Inc. – 14 minutes ago

Share

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



The screenshot shows the Marketing Wishlist sharing interface. A modal window titled 'Share Marketing Wishlist with' is open, showing sharing permissions for 'Everyone' and individual users. A dropdown menu for selecting users is open, listing several users with their email addresses and names.

User	Can Read	Can Write	Can Share
Everyone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
bruce@example.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
simran@iwebnotes.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
matt@example.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Share this document with:

- bruce@example.com (Bruce Wayne)
- harshit@erpnext.com (Harshit)
- marica@erpnext.com (Marica)
- matt@example.com (Matthew Hoffman)

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.