

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.

Tools

Search or type a command (Ctrl + G)

Settings Help

To Do

Menu Refresh New

Reports

List

Calendar

Kanban

Assigned By Me

FILTER BY

Assigned To

Created By

Add Fields

TAGS

Tags

Show tags

SAVE FILTER

Filter Name

Name

Due Date

Allocated To

Description

Add Filter

Last Modified On

Description	Status	Priority	Reference Type		20 of 83
Create an identity card : Simran	Open	Medium	Task	Open	2 h 0
Anne	Open	Medium	Sales Order	Open	6 h S 0
Complete Monthly target	Closed	Medium	Task	Open	10 d A 0
Not able to save Payment Entry(Rec	Open	Medium	Issue	Open	10 d 0
Complete Monthly target	Open	Medium	ToDo	Open	11 d 0
Complete Monthly target	Cancelled	Medium	ToDo	Open	11 d 0
Check ToDo fundamental for Tasks	Open	Medium			13 d 0

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

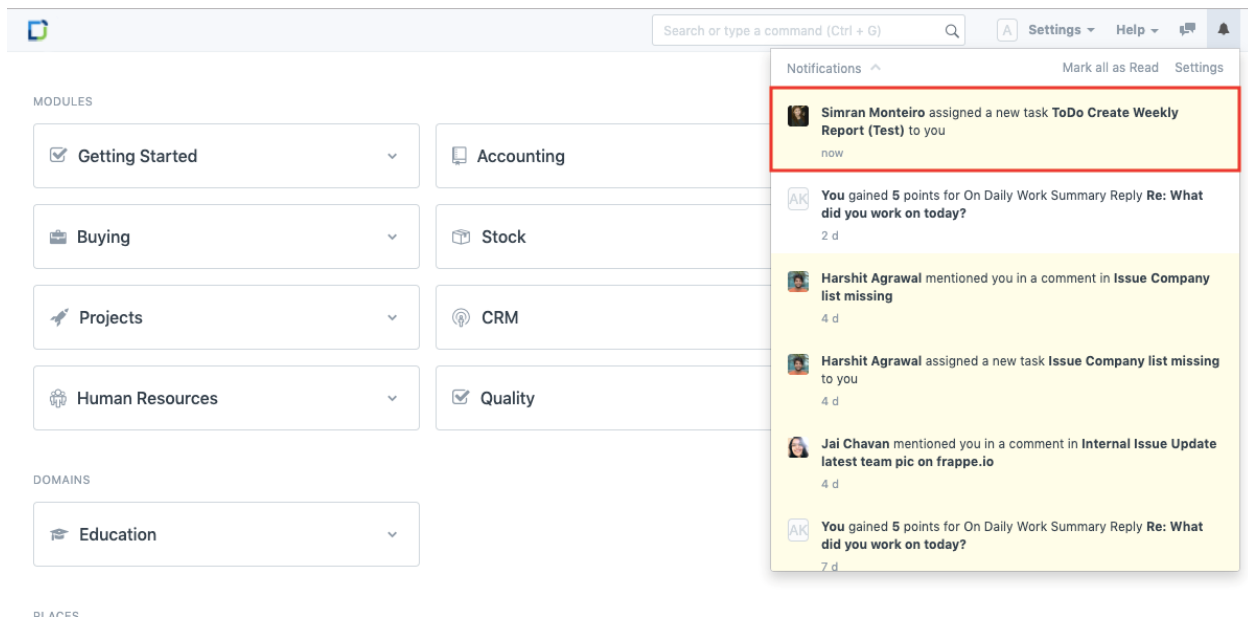
1. How to create a ToDo

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.

Tools > ToDo

Search or type a command (Ctrl + G)

Settings Help

Create an identity cad: Jane Doe Open

Comments 0

Assigned To Bruce Wayne...

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

Status Open

Color #a83333

Priority Medium

Due Date 16-12-2019

Allocated To bruce@example.com

Description

Normal B I U A Table

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.

Tools > ToDo

Search or type a command (Ctrl + G)

Settings Help

Not able to save Payment Entry(Receipt) Open

REFERENCE

Reference Type Issue

Reference Name ISS-2019-00002

Role

Assigned By simran@iwebnotes.com

Assigned By Full Name Simran Monteiro

2. ToDo Statues

ToDo has 3 statues, 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'.

The screenshot shows the ERPNext interface for a 'ToDo' item. The breadcrumb navigation is 'Home > Tools > ToDo'. The title bar indicates 'Not able to save Payment Entry(Receipt)' with a red dot and 'Open' status. The form fields include:

- Status:** A dropdown menu with options 'Open' (selected), 'Closed', and 'Cancelled'.
- Color:** An empty text field.
- Due Date:** A date field containing '02-12-2019'.
- Allocated To:** A text field containing 'akshita@erpnext.com'.
- Priority:** A dropdown menu with 'Medium' selected.

 The left sidebar contains sections for 'Comments' (0), 'Assigned To' (Assign +), 'Attachments' (Attach File +), 'Tags' (Add a tag ...), and 'Reviews' (+). The top right has a search bar and links for 'Settings', 'Help', and a 'Save' button.

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

Notes

Menu Refresh New

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 Blog	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 Ltd "Assets"	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 Sept #01	3 M 0

How to create a new Note

- Go to Note list and click on New.
- Enter the Title of the Note.
- 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.
- Save.

Open Discussion at 4 p.m. Public Menu Save

Comments 0 Edit

Assigned To
Assign +

Attachments
Attach File +

Tags
Add a tag ...

Reviews
+

Shared With
+

You edited this a few seconds ago

Title
Open Discussion at 4 p.m.

☒ Public

☒ Notify users with a popup when they log in

☐ Notify Users On Every Login
If enabled, users will be notified every time they login. If not enabled, users will only be notified once.

Expire Notification On
16-12-2019

Content

Normal **B** *I* U A 🔗 📎 📧 📅 📌 📊 📈 📉 📊 📈 📉 Table 🔗

At 6th floor cafeteria. Snacks on the house)

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.

Tools > Note Search or type a command (Ctrl + G) Settings Help Menu Save

Marketing Wishlist Private Edit

Comments 0

Assigned To
Assign +

Attachments
Attach File +

Tags
Add a tag ...

Reviews
+

Shared With
B S M +

You edited this a few seconds ago

Share Marketing Wishlist with Close

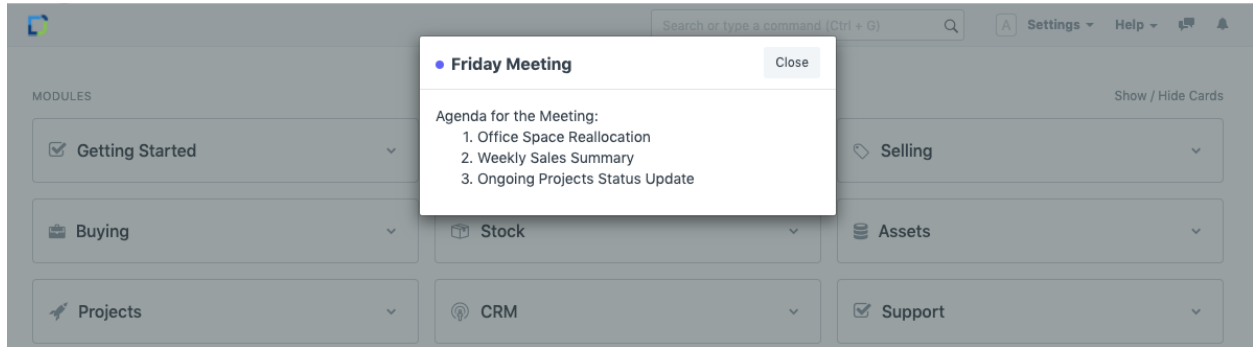
User	Can Read	Can Write	Can Share
Everyone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
bruce@example.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
simran@iwebnotes.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>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

Share this document with

	Can Read	Can Write	Can Share
bruce@example.com Bruce Wayne	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
harshit@erpnext.com Harshit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
marica@erpnext.com Marica	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
matt@example.com Matthew Hoffman	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

Settings
Video

Search or type a command (Ctrl + G)

Settings
Help

Linear Algebra

Menu
Save

LA

Comments0

Assigned ToAssign +

AttachmentsAttach File +

TagsAdd a tag ...

Reviews+

Shared With+

You edited this3 minutes ago

Watch Video

ProviderYouTube

Publish Date20-04-2020

URLhttps://youtu.be/HAoL5fPmgrw

Duration10m 11s

Description

Normal
B
I
U
A

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.

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.

Video Settings
Not Saved

Menu
Save

Comments0

Assigned ToAssign +

AttachmentsAttach File +

Tags

Reviews

☒ Enable YouTube Tracking

API Key

Frequency

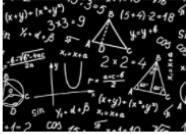
30 mins

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



Comments0

Assigned To
Assign +

Attachments
algebra.png
Attach File +

Tags
Add a tag ...

Reviews
+

Shared With
+

♥

You edited this
just now

You created this
1 hour ago

Watch Video

ProviderYouTube

Publish Date20-04-2020

URLhttps://youtu.be/HAoL5fPmgrw

Duration10m 12s

YOUTUBE STATISTICS






























Likes481

Dislikes6

Views54,219

Comments29

Description

Normal B I U A          Table                    

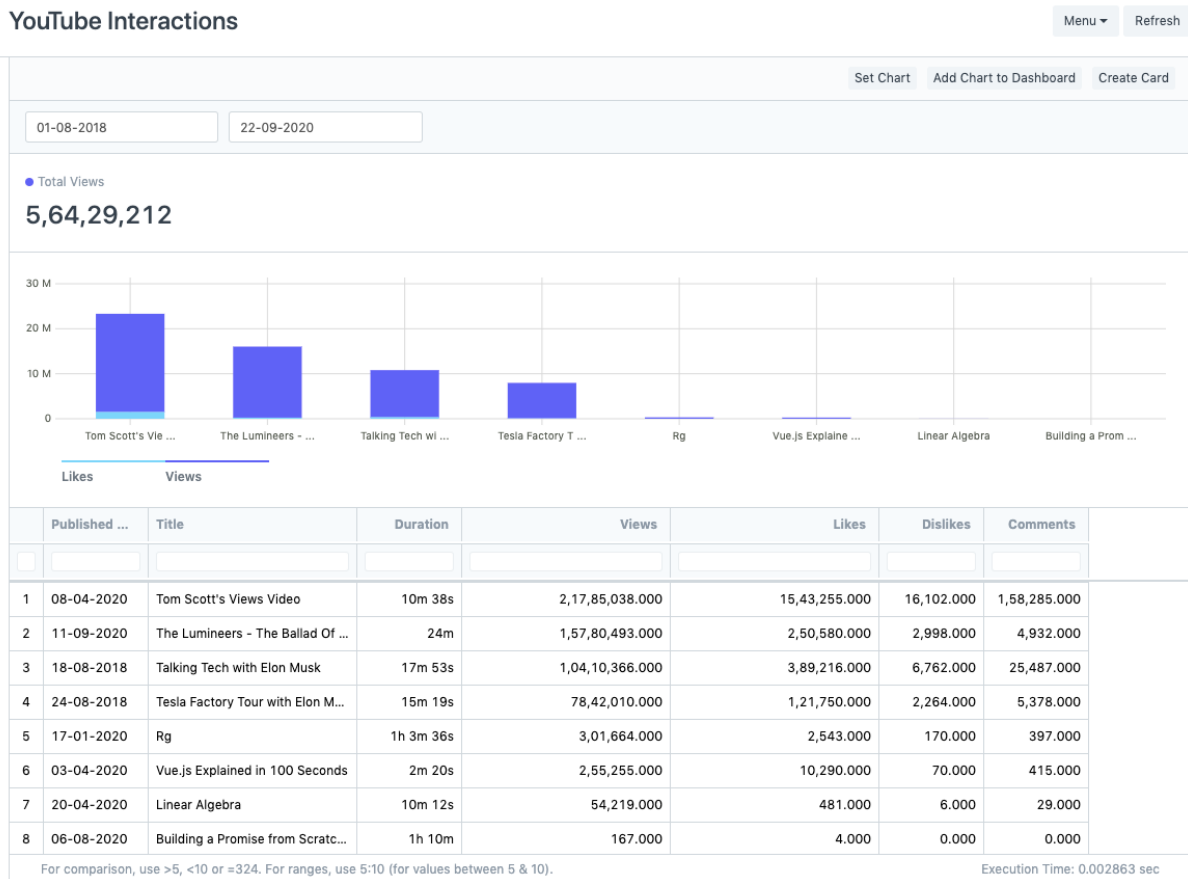
This is the first in a series of lectures for a college-level linear algebra course. This lecture includes definitions of basic terminology relating to systems of linear equations.

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.

YouTube Interactions



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 New

Calendar ▾	December 2019							< today >	month	week	day
Kanban ▾	SUN	MON	TUE	WED	THU	FRI	SAT				
FILTER BY	1	2	3	4	5	6	7				
Assigned To ▾			3:33a Birthday: Jan								
Created By ▾											
Add Fields +											
TAGS											
Tags ▾	8	9	10	11	12	13	14				
Show tags		9a Company Audits		9a Meeting with California clients							
SAVE FILTER											
Filter Name	15	16	17	18	19	20	21				
	Meeting with California clients					9a Monthly Reportir					
	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.

Michelle Not Saved

CRM-LEAD-2019-00053 Menu Save

Reviews

+

Shared With

+

FOLLOW UP

Next Contact By

bruce@example.com

Next Contact Date

28-12-2019 12:24:28

Ends On

28-12-2019 13:24:28

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.

Name

Work Order

Operation

Employee

Add Filter

Last Modified On

December 2019

<

today

>

month

week

day

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
<div>PO-JOB00020 PRO-00114-1 Rohit</div> <div>PO-JOB00051 PRO-00126</div> <div>2:49p PO-JOB00060 PRO-00128</div> <div>2:49p PO-JOB00052 PRO-00126</div>	<div>11:59a PO-JOB000 PRO-00127</div> <div>1:59p PO-JOB00055 PRO-00127</div>	<div>1:45p PO-JOB0005 PRO-00127</div> <div>6:19p PO-JOB0006 PRO-00128 Prasann Shah</div> <div>6:29p PO-JOB0006 PRO-00128 Karan Shah</div>	<div>9a PO-JOB00056 PRO-00127</div>			

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 Menu Save

Comments 0 Add Participants

Assigned To
Assign +

Attachments
Attach File +

Tags
Add a tag ...

Reviews
+

Shared With
+

DETAILS

Subject
Monthly Reporting

Event Category
Meeting

Event Type
Public

Color
#fff168

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

Ends on

Status
Open

☒ Send an email reminder in the morning

☐ Repeat this Event

☐ All Day

☐ Sync with Google Calendar

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

List

Calendar

Kanban

FILTER BY

Assigned To

Created By

Add Fields

TAGS

Tags

Show tags

SAVE FILTER

Filter Name

Name

For Company

Restricted

Add Filter

Last Modified On

<input type="checkbox"/> Name	Status	Enabled	For Company	How frequently?	5 of 5
<input type="checkbox"/> Open Tickets	Enabled	✓	Frappe Technol...	Daily	Open Tickets 2 y 0
<input type="checkbox"/> Default Weekly Digest - We	Disabled		Frappe Technol...	Weekly	t - Web Notes Te... 5 y 0
<input type="checkbox"/> Default Weekly Digest - Fra	Enabled	✓	Frappe Technol...	Weekly	t - Frappe Techn... 5 y 0
<input type="checkbox"/> Daily Digest	Enabled	✓	Frappe Technol...	Daily	Daily Digest 6 y 0
<input type="checkbox"/> Monthly Email Digest	Enabled	✓	Frappe Technol...	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,

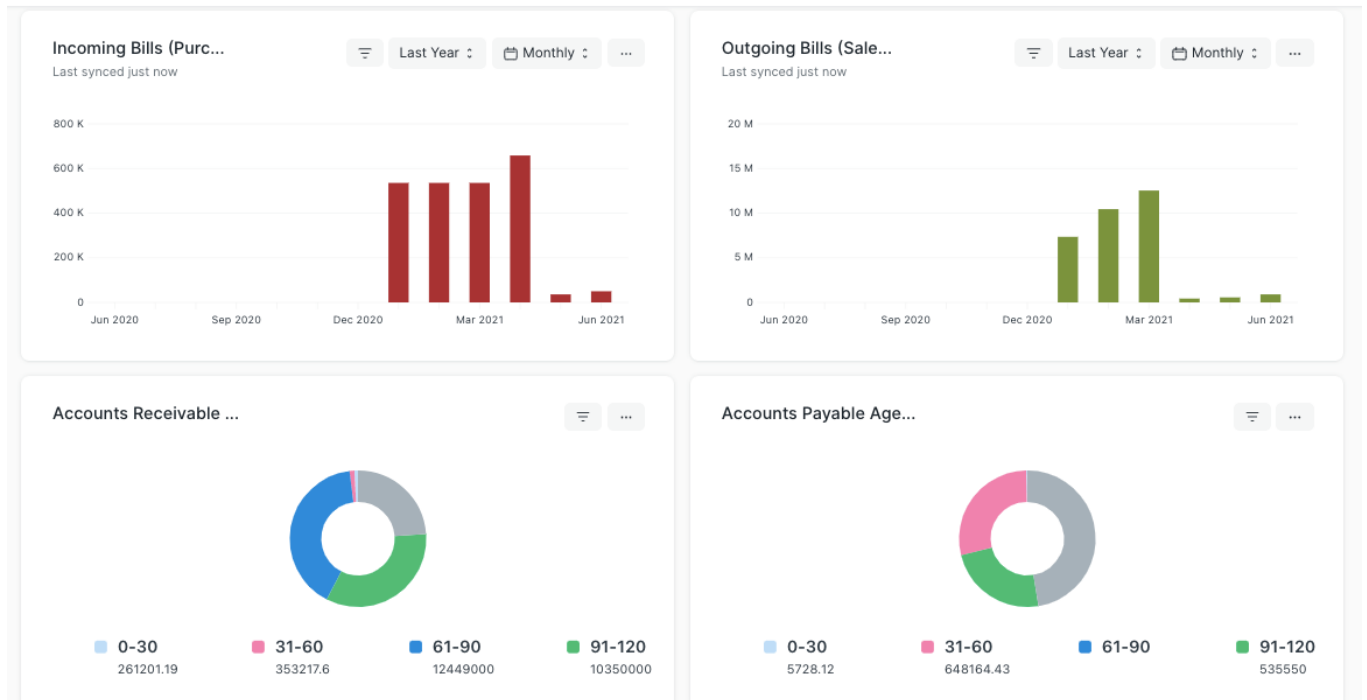
Home > Customization > Dashboards > Dashboard

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 < > Print ... 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

Charts

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

Add Row

Chart Options

1

- Category-wise Asset Value
- Location-wise Asset Value
- 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.

Accounts Detailed

Assigned To: +

Attachments: Attach File +

Reviews: +

Shared With: +

☐ Is Default

☐ Is Standard

Charts

<input type="checkbox"/> No.	Chart	Width	
<input type="checkbox"/> 1	Profit and Loss	Full	Edit
<input type="checkbox"/> 2	Incoming Bills (Purchase Invoice)	Half	Edit

[Add Row](#)

Show Dashboard < > Print ... [Save](#)

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.

New Dashboard Chart * Not Saved [Add Chart to Dashboard](#) ... [Save](#)

☐ Is Standard

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

☐ Time Series

Chart Name *
Bank

Chart Type
Custom

Type
Line

Chart Source
|

- Top 10 Pledged Loan Securities
- Department wise Patient Appointments
- Warehouse wise Stock Value
- Account Balance Timeline
- [Advanced Search](#)

[Set Filters](#)

Chart Options

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

Click the table to edit filters.

Material Planning

Add Chart to Dashboard < > Save

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

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

Dashboard Chart > Material Planning

Material Planning

You edited this
5 minutes ago

You created this
7 minutes ago

Filters

Filter	Condition	Value
status	Not In	Draft,Cancelled,Stoppe
docstatus	Equals	Submitted
transaction_date	Timespan	Last Quarter
Purpose	Equals	Purchase

+ Add a Filter

Chart Options

Custom Options

1

Color

Choose a color

Set Filters

Status

Not In

Draft,Cancelled,Stoppe
values separated by commas

×

Document Status

Equals

Submitted

×

Transaction Date

Timespan

Last Quarter

×

Purpose

Equals

✓ Purchase

Material Transfer

Material Issue

Manufacture

Customer Provided

×

Set

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

Material Planning

Add Chart to Dashboard<>⋮Save

You edited this

You created this
7 minutes ago

Filters

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.

☐ Is Standard

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

Chart Name *
Count Todo

Timespan
Last Year

Chart Type
Count

Time Interval
Yearly

Document Type
ToDo

☒ Time Series

Time Series Based On
Created On

Type
Line

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 *

Count Chart

Chart Type

Count

Document Type

Dashboard Chart Link

Parent Document Type

Dashboard

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

Time Series Based On

Created On

☐ Is Public

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

Timespan

Last Year

Time Interval

Yearly

☒ Time Series

Type

Line

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

☐ Is Standard

Chart Name *

Sum Chart

Chart Type

Sum

Document Type

Item

Time Series Based On

Created On

Value Based On

Standard Selling Rate

☐ Is Public

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

Timespan

Last Year

Time Interval

Yearly

☒ Time Series

Type

Line

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

Chart Name *
 Group By Chart

Chart Type
 Group By

Document Type
 ToDo

Group By Type
 Count

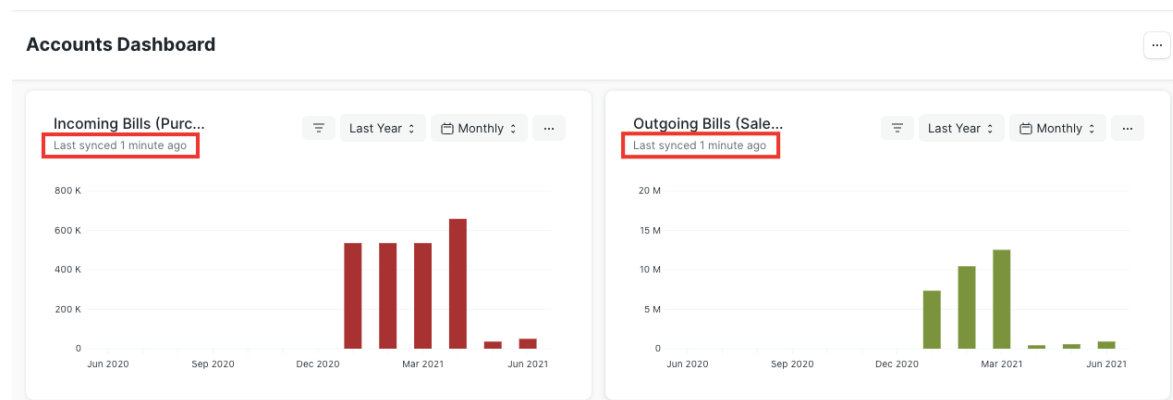
Group By Based On
 Created By

Number of Groups
 3

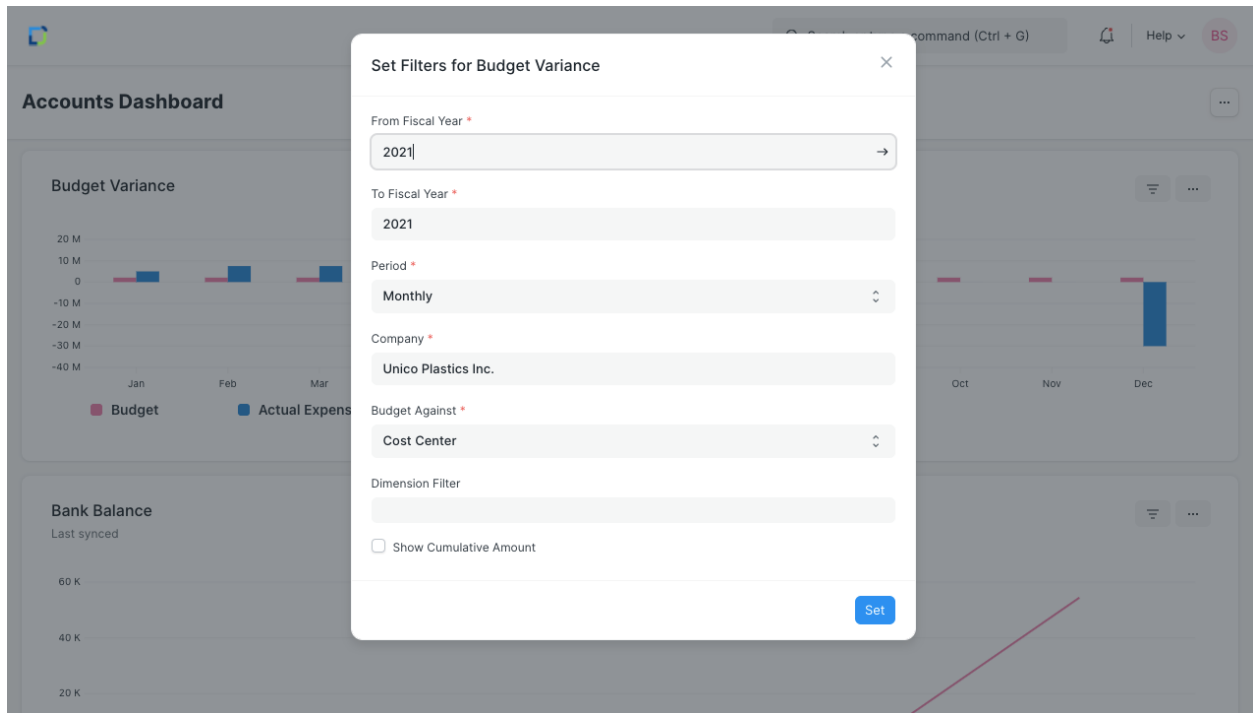
Type
 Line

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).

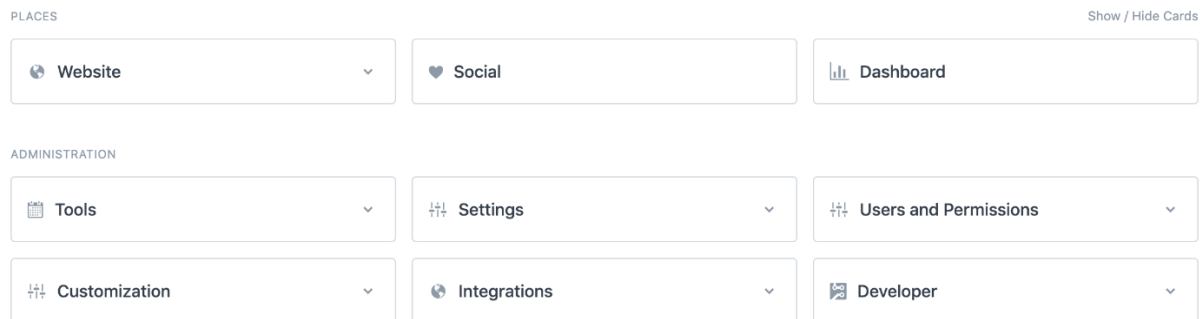
- Input 'foo & bar" can return any docs with both tags foo and bar assigned. (special long text field _usertags).

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.

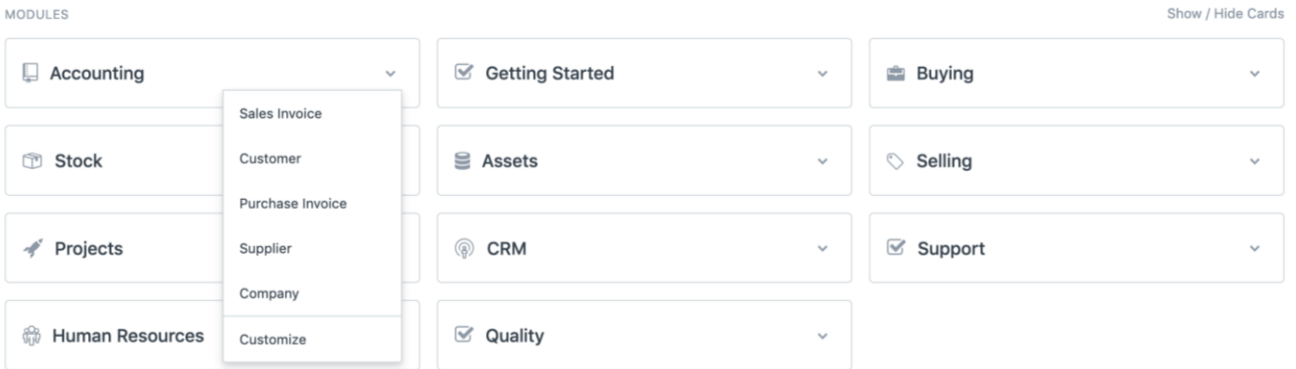
Their cards are a replacement to the erstwhile Module icons which were present in DellSuite versions before version 12.



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.

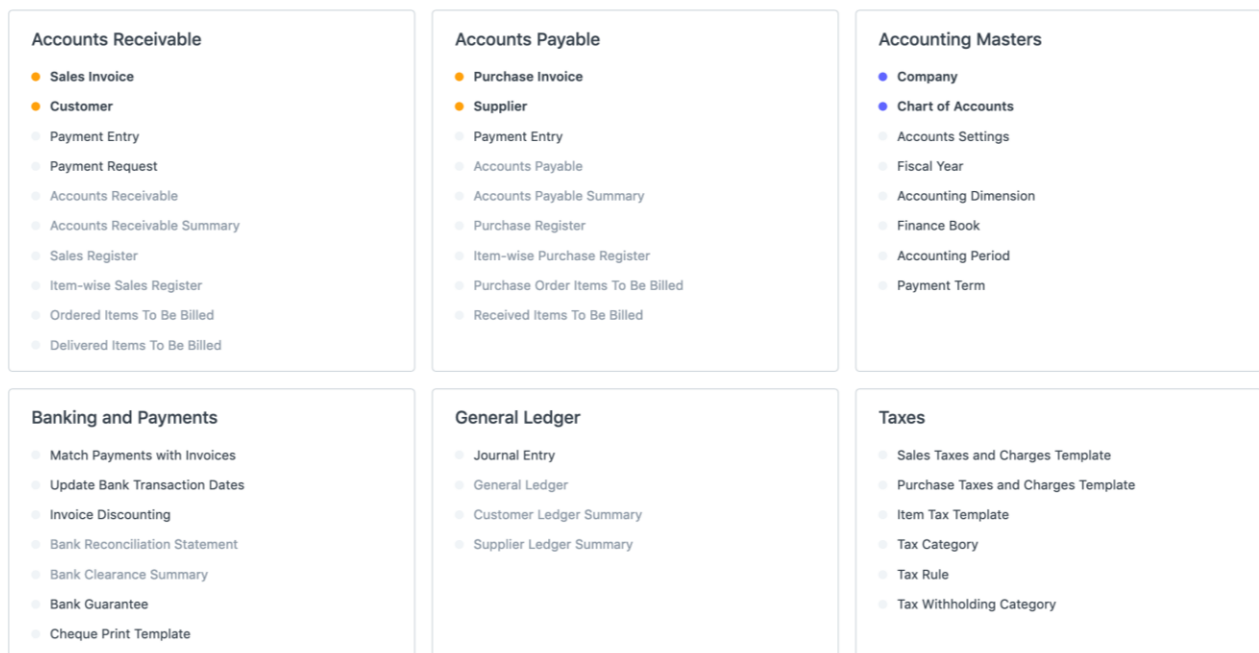


You can reorder as well as show or hide these module cards.

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.

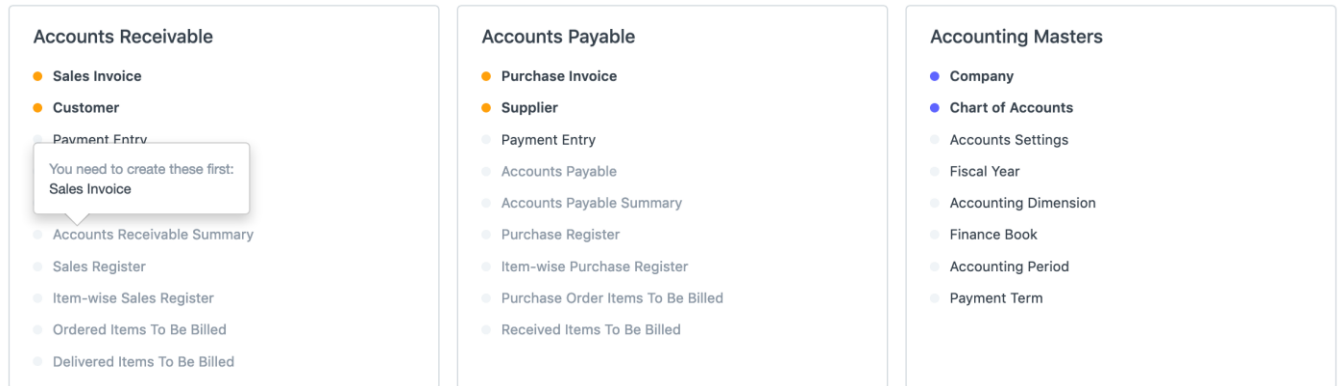
Accounting



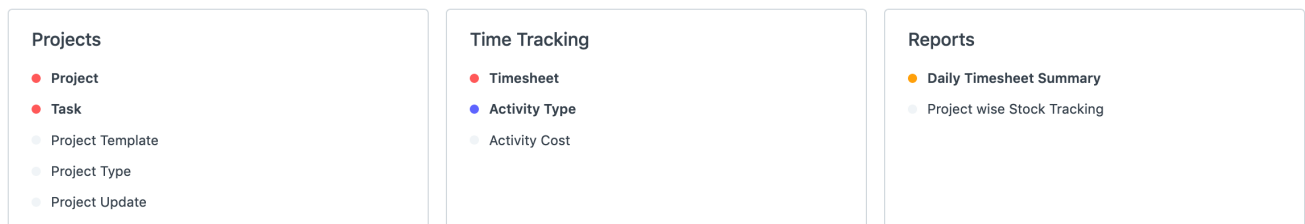
Navigating the page

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.

Unico Plastics Inc.
To Deliver and Bill
SAL-ORD-2019-00015
Menu
Cancel

Comments
0

Assigned To

S

Simran Mon...

×

A

Akshita K

×

Assign +

Attachments
Attach File +

Tags
Add a tag ...

Reviews
+

Shared With
+

DASHBOARD

Color
Customer
Kavita
Order Type
Sales

Company
Unico Plastics Inc.
Date
12-12-2019
Delivery Date
25-12-2019
Customer's Purchase Order

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.

To Do
Menu
Refresh
New

Reports
List
Calendar
Kanban
Assigned By Me
FILTER BY
Assigned To
Created By
Add Fields
TAGS

Name
Due Date
Allocated To
Description

Add Filter
Last Modified On

Description	Status	Priority	Reference Type			
Unico Plastics Inc.	Open	Medium	Sales Order	Open	3 m	0
Michelle	Open	Medium	Lead	Open	39 m	0
Tax in Expense claim	Open	Medium	Issue	Open	2 h	0
Create an identity cad: Jane Doe	Open	Medium	ToDo	Open	2 h	0

Removing Assignment

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

Unico Plastics Inc.

To Deliver and Bill

SAL-ORD-2019-00014

Menu

Cancel

Comments0

Assigned To

Akshita K

Assign +

Attachments

Attach File +

Tags

Add a tag ...

Reviews

+

DASHBOARD

Color

Customer

Kavita

Order Type

Sales

Company

Unico Plastics Inc.

Date

11-12-2019

Delivery Date

31-12-2019

Update Items

Create

Status

Hold

Close

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

Interview2

not reachable2

US1

shortlist1

Offer Letter1

Accounts1

Name

Applicant Name

Restricted

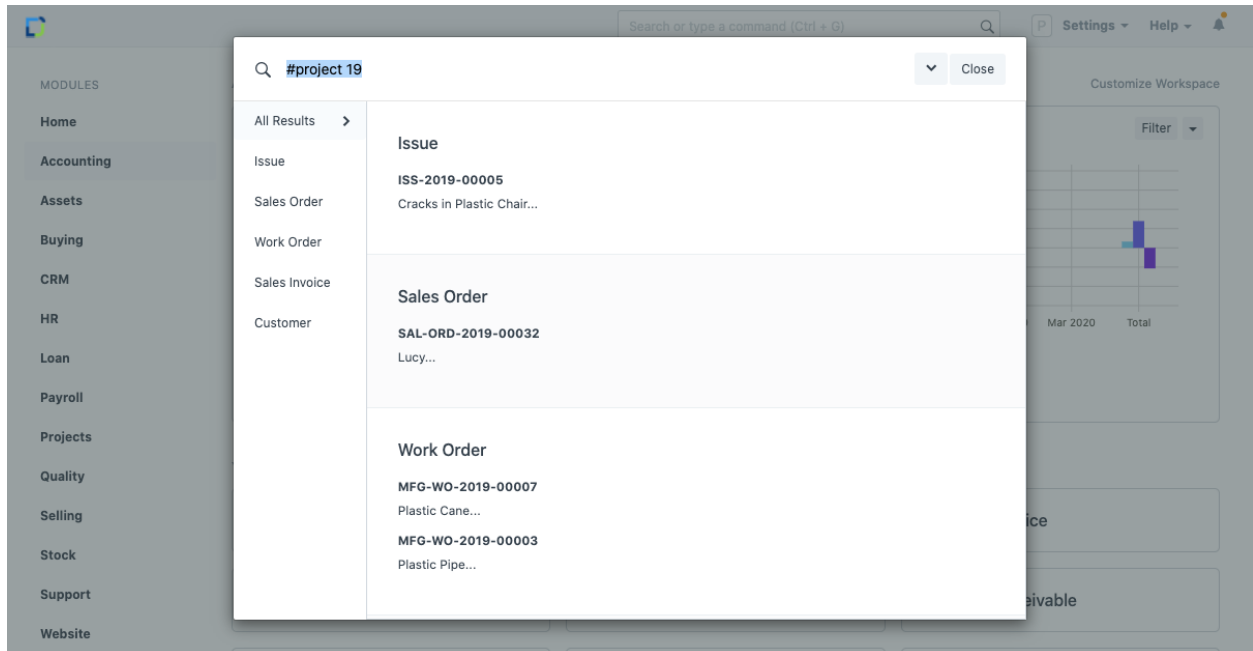
Add Filter

Last Modified On

Applicant Name	Status	Job Opening	500 of 2285
Ashuyousuf123	Rejected	business-analyst	isuf123@gmail.com 9 h 2
Javeria	Rejected	business-analyst	/27994@gmail.com 9 h 2
Hozefa	Rejected	business-analyst	riwala8@gmail.com 9 h 2
Akash mahyavanshi	Rejected	business-analyst	ranshi5@gmail.com 9 h 2
Siddhant Dube	Replied	software-developer	:sid@gmail.com - ... 9 h 1
Rohan Khairnar	Replied	software-developer	inkhairnar5@gma... 9 h 1
Harshada Subhash Bhoir	Replied	software-developer	ioir - harshadabh... 9 h 1
Rabbana Attar	Replied	software-developer	ana.shiklikar26@... 9 h 1
Mayank Vaishnav	Replied	software-developer	kvaishnav96@gm... 9 h 1
Vaishnvi Khalorkar	Replied	software-developer	'halorkarvaishnvi... 9 h 1
Sanjay Ram	Replied	software-developer	n41@gmail.com ... 9 h 1
ROHAN YEOLE	Replied	software-developer	ole@gmail.com - ... 9 h 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.

CRM

Search or type a command (Ctrl + G)

Settings Help

Report: Lead

Menu Refresh New

Reports

List

Images

Calendar

Kanban

FILTER BY

Assigned To

Created By

Add Fields +

TAGS

Tags

Show tags

SAVE FILTER

Filter Name

		Name	Person Name	
Add Filter				
	ID	Person Name	Tags	Organization ...
<input type="checkbox"/>	1	CRM-LEAD-201...	No-reply	,Website Leads
<input type="checkbox"/>	2	CRM-LEAD-201...	Harshit	,Cold Leads
<input type="checkbox"/>	3	CRM-LEAD-201...	Naresh	xyz
<input type="checkbox"/>	4	CRM-LEAD-201...	Michelle	Frappe Technolo...
<input type="checkbox"/>	5	CRM-LEAD-201...	Ken Seq	ERP NEXT
<input type="checkbox"/>	6	CRM-LEAD-201...	Invitations	
<input type="checkbox"/>	7	CRM-LEAD-201...	Damien	,Hot Leads,Webs...
<input type="checkbox"/>	8	CRM-LEAD-201...	dhailjd	
<input type="checkbox"/>	9	CRM-LEAD-201...	Simran	
<input type="checkbox"/>	10	CRM-LEAD-201...	test lead	,Cold Leads
<input type="checkbox"/>	11	CRM-LEAD-201...	Messages-noreply	

Support

Search or type a command (Ctrl + G)

Settings Help

Report: Issue

Menu Refresh New

Reports

List

Calendar

Kanban

FILTER BY

Assigned To

Created By

Add Fields +

TAGS

Tags

Show tags

SAVE FILTER

		Name	Subject	Account	Raised By (Email)	
Add Filter						
	ID	Subject	Status	Tags	Frappe Suppor...	Priority
<input type="checkbox"/>	1	ISS-2019-07392	Unable to use ERP in Ipad	Closed	,Enhancement	L1
<input type="checkbox"/>	2	ISS-2019-07426	No Subject	Closed	,Enhancements	L1
<input type="checkbox"/>	3	ISS-2019-07418	Picklist does not work correctly IN PRI...	Replied	,Enhancement	L1

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

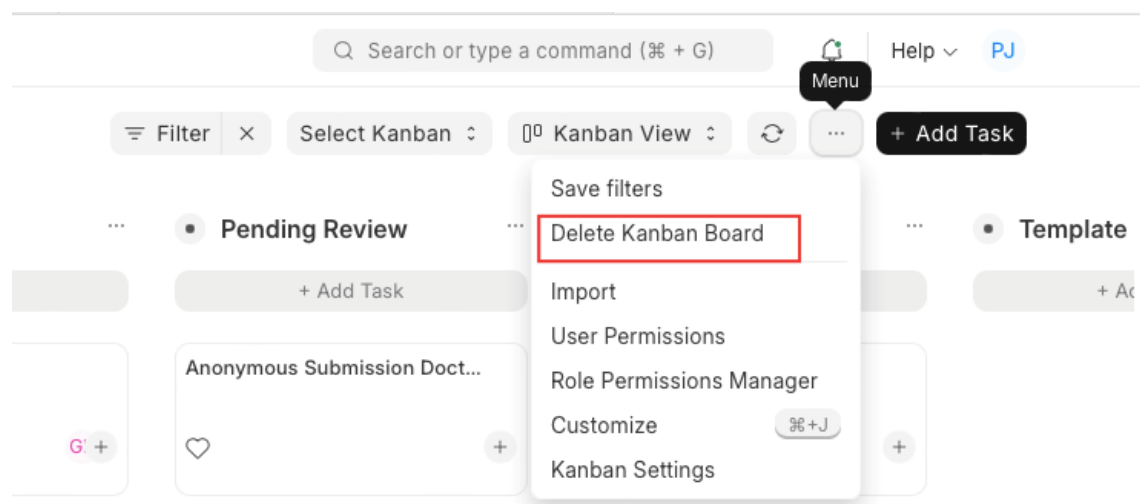
To add more columns in the Kanban board click on Add columns. You can also assign colors to columns. You can also Archive and Restore the columns added in a Kanban board. To do so click Archive in the drop-down menu on the card. Once archived you can restore the column from the list of the archived columns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

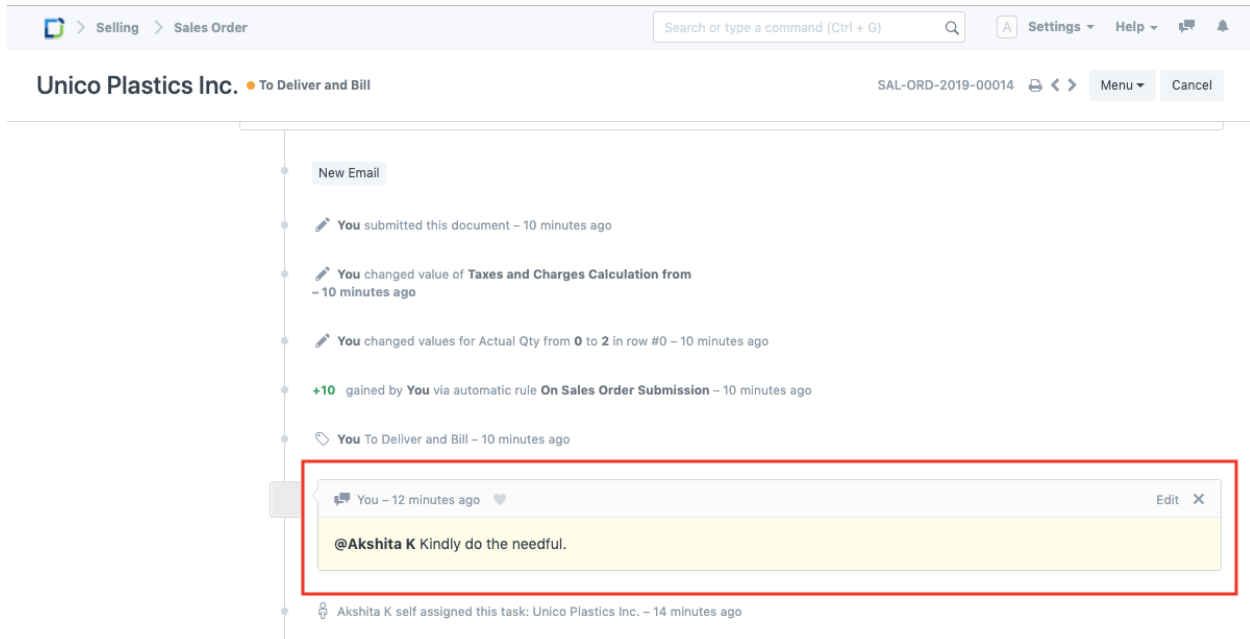
If a Document requires some action from a particular user, you can assign that document to that User. On assignment, the user shall be intimated of the same via an email. Click [here](#) to learn more about this feature.

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

The screenshot displays the DellSuite interface for a Sales Order document. The top navigation bar shows the breadcrumb 'Selling > Sales Order' and a search bar. The document title is 'Unico Plastics Inc.' with a status 'To Deliver and Bill' and a reference number 'SAL-ORD-2019-00015'. The left sidebar contains sections for 'Comments' (0), 'Assigned To' (highlighted with a red box), 'Attachments', 'Tags', 'Reviews', and 'Shared With'. The 'Assigned To' section lists two users: 'Simran Mon...' and 'Akshita K'. The main form area includes a 'DASHBOARD' dropdown and several input fields: 'Color' (Kavita), 'Customer' (Unico Plastics Inc.), 'Date' (12-12-2019), 'Order Type' (Sales), 'Delivery Date' (25-12-2019), and 'Customer's Purchase Order'.

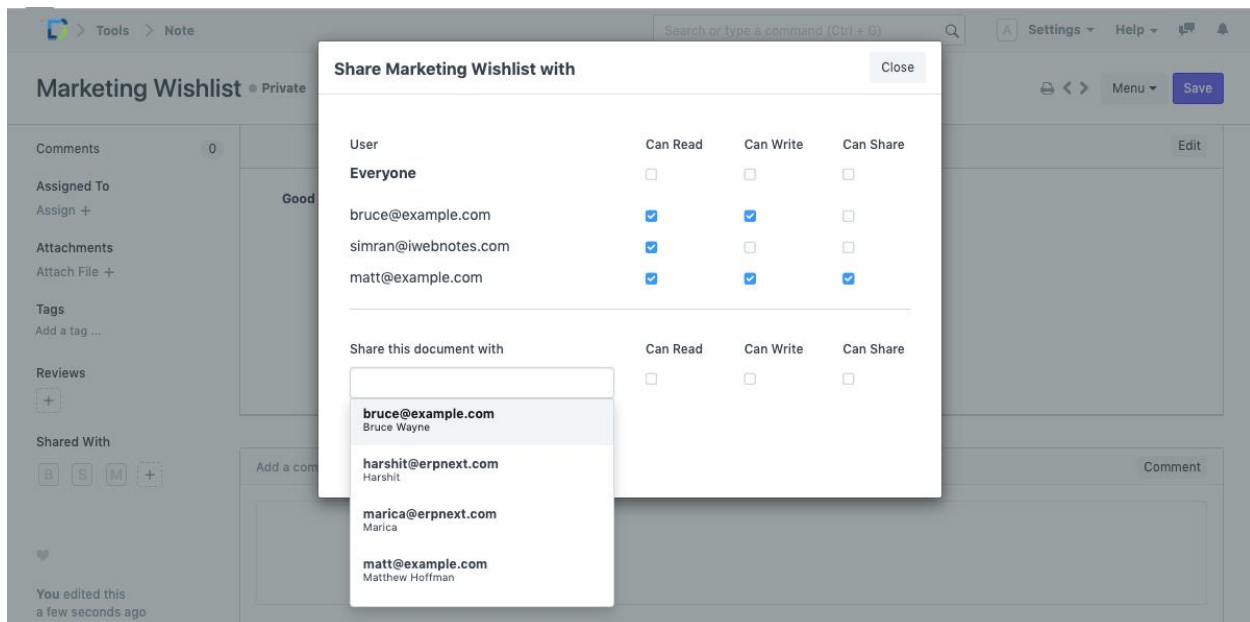
Comments

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.

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

Applicant Name	Status	Job Opening	500 of 2285
Ashyousuf123	Rejected	business-analyst	isuf123@gmail.com 9 h 2
Javeria	Rejected	business-analyst	/27994@gmail.com 9 h 2
Hozefa	Rejected	business-analyst	riwala8@gmail.com 9 h 2
Akash mahyavanshi	Rejected	business-analyst	ranshi5@gmail.com 9 h 2
Siddhant Dube	Replied	software-developer	ssid@gmail.com ~... 9 h 1
Rohan Khairnar	Replied	software-developer	inkhairnar5@gma... 9 h 1
Harshada Subhash Bhoir	Replied	software-developer	voir - harshadabh... 9 h 1
Rabbana Attar	Replied	software-developer	ana.shikilkar26@... 9 h 1
Mayank Vaishnav	Replied	software-developer	kvaishnav96@gm... 9 h 1
Vaishnvi Khalorkar	Replied	software-developer	'halorkarvaishnvi... 9 h 1
Sanjay Ram	Replied	software-developer	m41@gmail.com ... 9 h 1
ROHAN YEOLE	Replied	software-developer	ole@gmail.com ~ ... 9 h 1

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.

Tools > ToDo

Search or type a command (Ctrl + G)

Settings Help

Complete Monthly target Not Saved

Comments 0

Assigned To

Simran Mon...

Assign +

50 appreciation points for Simran Monteiro a few seconds ago

Great work done on the monthly target achievement

+50 +

Shared With

+

TASK-2019-00051 Reopen New

Status

Closed

Color

#a83333

Priority

Medium

Due Date

02-12-2019

Allocated To

simran@iwebnotes.com

Description

Normal B I U A

Complete Monthly target