

Part 1: Custom Fields and Forms

Customize Form - Customer

Actions

DetailsForm

DetailsDashboardAddress & ContactTaxAccountingSales TeamSettingsPortal UsersAdd tab

No Label

Series

Salutation

Customer Name *

Customer Type *

Customer Group

Add field

Customer Anniversary *

Territory

Gender

From Lead

From Opportunity

Account Manager

Image

Attach

Add field

CustomerNot Saved

Customize Child TableActions

DetailsForm

DetailsDashboardAddress & ContactTaxAccountingSales TeamSettingsPortal UsersAdd tab

No Label

Series

Salutation

Customer Name *

Customer Type *

Customer Group

Add field

Territory

Gender

From Lead

From Opportunity

Account Manager

Image

Attach

Add field

Defaults

```
custom_app > custom_app > Customize_Events > Customize_Event_Customerp > Custom One
import frappe
import frappe.utils

def validateDate(doc,method):
    # This Function Check Customer Anniversary Date is Not more than today Date
    if doc.custom_customer_anniversary and doc.custom_customer_anniversary > frappe.utils.today():
        frappe.throw("You Can't Choose Future Date")
```

Part 2: Workflows

Editing Sales Order Workflow Beta

Reset Changes ... Save

State Properties

State *

Rejected

Doc Status

Cancelled

Only Allow Edit For *

Sales Manager

Update Field

Update Value

☐ Is Optional State

Workflow Action is not created for optional states

Drag to add state

+ - Fit

Sales Order Workflow Active

Go to Sales Order List < > 🖨️ ... Save

Rules for how states are transitions, like next state and which role is allowed to change state etc.

Transitions

Rules defining transition of state in the workflow.

<input type="checkbox"/>	No.	State *	Action *	Next State *	Allowed *	⚙️
<input type="checkbox"/>	1	Draft	Submit For Approval	Pending Approval	Sales User	✎
<input type="checkbox"/>	2	Pending Approval	Approve	Approved	Sales Manager	✎
<input type="checkbox"/>	3	Pending Approval	Reject	Rejected	Sales Manager	✎

Add Row

Workflow State Field *

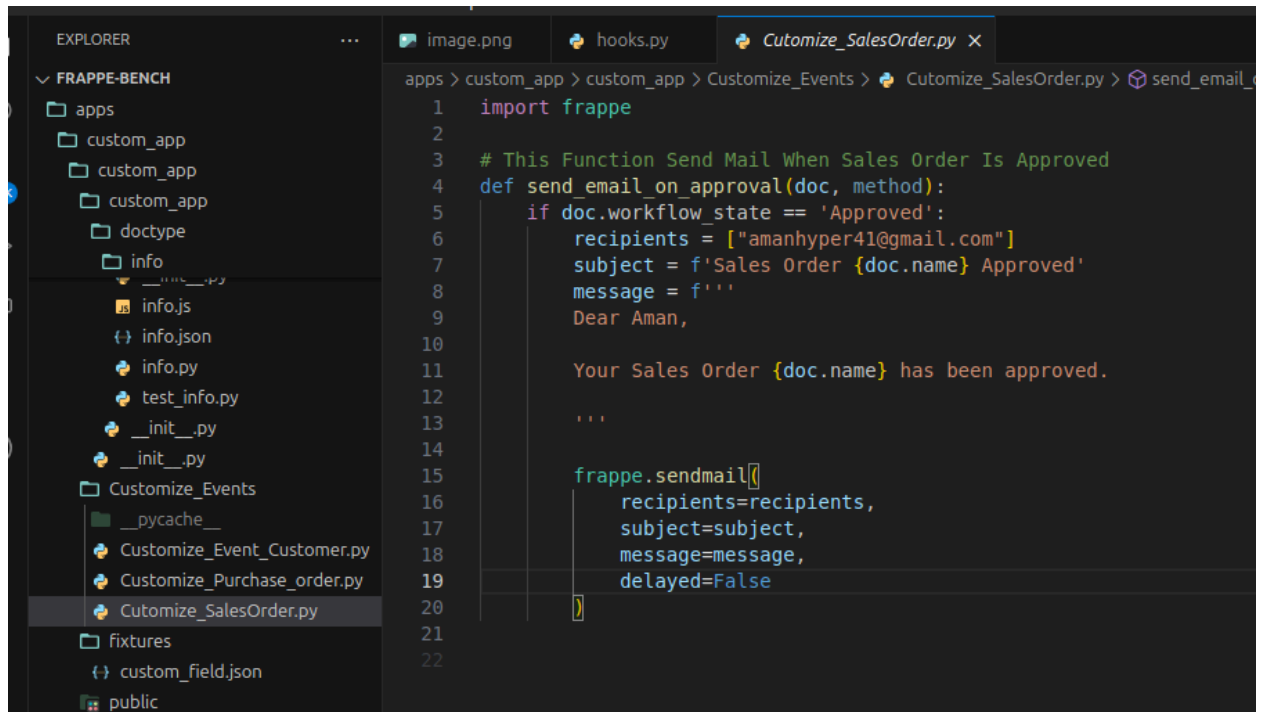
workflow_state

Field that represents the Workflow State of the transaction (If field is not present, a new hidden Custom Field will be created)

Comments

A

Type a reply / comment



Part 3: Print Formats

Code-

```
<!DOCTYPE html>
```

```
<html>
```

```
<head>
```

```
<style>
```

```
.header, .footer {
    width: 100%;
    text-align: center;
}
```

```
.items-table {
    width: 100%;
    border-collapse: collapse;
}
```

```
.items-table th, .items-table td {
    border: 1px solid #000;
    padding: 8px;
}
```

```
</style>
```

```
</head>
```

```
<body>
```

```
<div class="header">
```

```


<h2>Custom Sales Invoice</h2>

</div>

<div>

<p><strong>Invoice No:</strong> {{ doc.name }}</p>

<p><strong>Customer:</strong> {{ doc.customer\_name }}</p>

{% if doc.custom\_customer\_anniversary %}

<p><strong>Customer Anniversary:</strong> {{ doc.custom\_customer\_anniversary }}</p>

{% endif %}

</div>

<table class="items-table">

<thead>

<tr>

<th>Item Code</th>

<th>Item Name</th>

<th>Qty</th>

<th>Rate</th>

<th>Amount</th>

</tr>

</thead>

<tbody>

{% for item in doc.items %}

<tr>

<td>{{ item.item\_code }}</td>

<td>{{ item.item\_name }}</td>

<td>{{ item.qty }}</td>

<td>{{ item.rate }}</td>

<td>{{ item.amount }}</td>

</tr>

{% endfor %}

</tbody>

</table>

<div class="footer">

<h3><strong>Terms and Conditions:</strong></h3>

<p>Thank you for your business. Please review our terms and conditions below:</p>

<ol>

<li><strong>Payment Terms:</strong> Payment is due within 30 days from the date of invoice. Late payments may incur a late fee of 1.5% per month.</li>

<li><strong>Returns and Refunds:</strong> Returns are accepted within 14 days of delivery. Items must be in original condition and packaging. A restocking fee of 10% may apply.</li>

<li><strong>Shipping:</strong> Shipping charges are non-refundable. Customers are responsible for return shipping costs.</li>

<li><strong>Warranty:</strong> Our products come with a one-year warranty covering manufacturing defects. This warranty does not cover damage caused by misuse, abuse, or improper maintenance.</li>

<li><strong>Privacy Policy:</strong> We respect your privacy and are committed to protecting your personal information. Please review our privacy policy for more details.</li>

<li><strong>Governing Law:</strong> These terms and conditions are governed by and construed in accordance with the laws of the jurisdiction where our company is registered.</li>

<li><strong>Contact Information:</strong> If you have any questions or concerns about these terms, please contact us at support@yourcompany.com or (123) 456-7890.</li>

</ol>

<p>By accepting this invoice, you agree to these terms and conditions.</p>

</div>

</body>

</html>



## Custom Sales Invoice

**Invoice No:** ACC-SINV-2024-00001

**Customer:** A

**Customer Anniversary:** 2024-07-05

| Item Code | Item Name | Qty | Rate | Amount |
|-----------|-----------|-----|------|--------|
| 101       | 101       | 1   | 1000 | 1000   |

### Terms and Conditions:

Thank you for your business. Please review our terms and conditions below:

- Payment Terms:** Payment is due within 30 days from the date of invoice. Late payments may incur a late fee of 1.5% per month.
- Returns and Refunds:** Returns are accepted within 14 days of delivery. Items must be in original condition and packaging. A restocking fee of 10% may apply.
- Shipping:** Shipping charges are non-refundable. Customers are responsible for return shipping costs.
- Warranty:** Our products come with a one-year warranty covering manufacturing defects. This warranty does not cover damage caused by misuse, abuse, or improper maintenance.
- Privacy Policy:** We respect your privacy and are committed to protecting your personal information. Please review our privacy policy for more details.
- Governing Law:** These terms and conditions are governed by and construed in accordance with the laws of the jurisdiction where our company is registered.
- Contact Information:** If you have any questions or concerns about these terms, please contact us at [support@yourcompany.com](mailto:support@yourcompany.com) or (123) 456-7890.

By accepting this invoice, you agree to these terms and conditions.

## Part 4: Scripts

### Client Script-

```
frappe.ui.form.on('Custom Order Item', {
 qty: function(frm, cdt, cdn) {
 calculate_row_total(frm, cdt, cdn);
 calculate_total_cost(frm);
 },
 selling_price: function(frm, cdt, cdn) {
 calculate_row_total(frm, cdt, cdn);
 calculate_total_cost(frm);
 }
});
```

```

 }
});

function calculate_row_total(frm, cdt, cdn) {
 let row = locals[cdt][cdn];
 (row.qty && row.selling_price)?row.total_price = row.qty *
row.selling_price: row.total_price = 0;
 frm.refresh_field('table_kpnf');
}

function calculate_total_cost(frm) {
 if (frm.doc.table_kpnf.length===0) {
 frm.doc.total_cost=total_cost=0
 return;
 }

 let total_cost = 0;
 frm.doc.table_kpnf.forEach(item => {
 total_cost += parseInt(item.total_price)|| 0;
 });
 frm.doc.total_cost=total_cost
}

frappe.ui.form.on("Custom Order",{
 refresh: function(frm) {
 console.log("Form refreshed");
 debugger; // JavaScript breakpoint
 a=1
 b=2
 console.log(a+b)
 }
})

```

## Server Script-

```

import frappe

def sendMail(doc,method):
 if doc.docstatus==1:

```



```

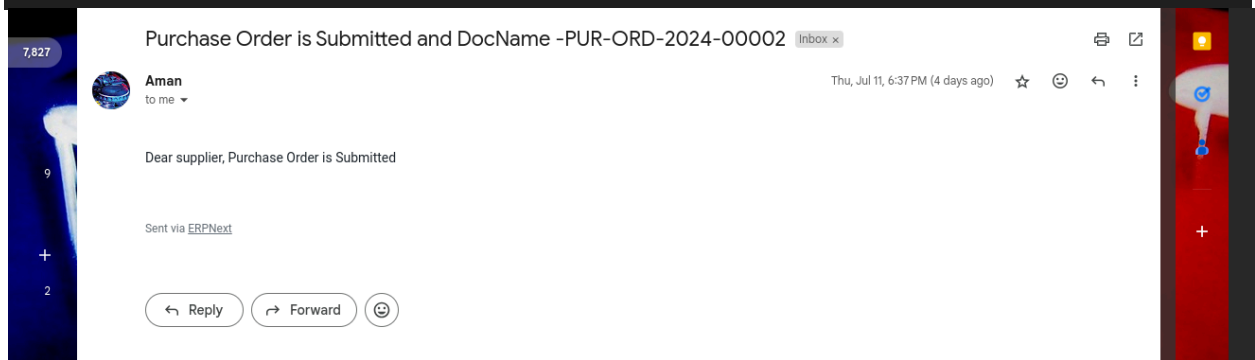
recipients=["amanhyper41@gmail.com"]
subject=f" Purchase Order is Submitted and DocName -{doc.name} "
message=""

 Dear supplier,
 Purchase Order is Submitted

 """

frappe.sendmail(
 recipients=recipients,
 subject=subject,
 message=message,
 delayed=False
)




```






## Part 5: Permissions

| Document Type |                                          | Project Admin |                                            |                                            |                                            |
|---------------|------------------------------------------|---------------|--------------------------------------------|--------------------------------------------|--------------------------------------------|
| Document Type | Role                                     | Level         | Permissions                                |                                            |                                            |
| Project       | Project Admin                            | 0             | <input checked="" type="checkbox"/> Select | <input checked="" type="checkbox"/> Read   | <input checked="" type="checkbox"/> Write  |
|               | <input type="checkbox"/> Only If Creator |               | <input checked="" type="checkbox"/> Create | <input checked="" type="checkbox"/> Delete | <input checked="" type="checkbox"/> Print  |
|               |                                          |               | <input checked="" type="checkbox"/> Email  | <input checked="" type="checkbox"/> Report | <input checked="" type="checkbox"/> Import |
|               |                                          |               | <input checked="" type="checkbox"/> Export | <input checked="" type="checkbox"/> Share  |                                            |

Quick Help for Setting Permissions:

| Document Type |                                          | Projects Manager |                                            |                                            |                                           |                                                                                     |
|---------------|------------------------------------------|------------------|--------------------------------------------|--------------------------------------------|-------------------------------------------|-------------------------------------------------------------------------------------|
| Document Type | Role                                     | Level            | Permissions                                |                                            |                                           |                                                                                     |
| Project       | Projects Manager                         | 0                | <input checked="" type="checkbox"/> Select | <input checked="" type="checkbox"/> Read   | <input checked="" type="checkbox"/> Write |  |
|               | <input type="checkbox"/> Only If Creator |                  | <input checked="" type="checkbox"/> Create | <input type="checkbox"/> Delete            | <input checked="" type="checkbox"/> Print |                                                                                     |
|               |                                          |                  | <input checked="" type="checkbox"/> Email  | <input checked="" type="checkbox"/> Report | <input type="checkbox"/> Import           |                                                                                     |
|               |                                          |                  | <input checked="" type="checkbox"/> Export | <input checked="" type="checkbox"/> Share  |                                           |                                                                                     |
|               |                                          |                  |                                            |                                            |                                           |                                                                                     |
| Project Type  | Projects Manager                         | 0                | <input checked="" type="checkbox"/> Select | <input checked="" type="checkbox"/> Read   | <input checked="" type="checkbox"/> Write |  |
|               | <input type="checkbox"/> Only If Creator |                  | <input checked="" type="checkbox"/> Create | <input type="checkbox"/> Delete            | <input checked="" type="checkbox"/> Print |                                                                                     |
|               |                                          |                  | <input checked="" type="checkbox"/> Email  | <input checked="" type="checkbox"/> Report | <input type="checkbox"/> Import           |                                                                                     |
|               |                                          |                  | <input checked="" type="checkbox"/> Export | <input checked="" type="checkbox"/> Share  |                                           |                                                                                     |
|               |                                          |                  |                                            |                                            |                                           |                                                                                     |
| Task Type     | Projects Manager                         | 0                | <input type="checkbox"/> Select            | <input checked="" type="checkbox"/> Read   | <input checked="" type="checkbox"/> Write |  |
|               | <input type="checkbox"/> Only If Creator |                  | <input checked="" type="checkbox"/> Create | <input type="checkbox"/> Delete            | <input checked="" type="checkbox"/> Print |                                                                                     |
|               |                                          |                  |                                            |                                            |                                           |                                                                                     |
|               |                                          |                  |                                            |                                            |                                           |                                                                                     |
|               |                                          |                  |                                            |                                            |                                           |                                                                                     |

| Document Type |                                          | Projects User |                                            |                                            |                                           |                                                                                       |
|---------------|------------------------------------------|---------------|--------------------------------------------|--------------------------------------------|-------------------------------------------|---------------------------------------------------------------------------------------|
| Document Type | Role                                     | Level         | Permissions                                |                                            |                                           |                                                                                       |
| Project       | Projects User                            | 0             | <input checked="" type="checkbox"/> Select | <input checked="" type="checkbox"/> Read   | <input type="checkbox"/> Write            |    |
|               | <input type="checkbox"/> Only If Creator |               | <input checked="" type="checkbox"/> Create | <input type="checkbox"/> Delete            | <input checked="" type="checkbox"/> Print |                                                                                       |
|               |                                          |               | <input checked="" type="checkbox"/> Email  | <input checked="" type="checkbox"/> Report | <input type="checkbox"/> Import           |                                                                                       |
|               |                                          |               | <input type="checkbox"/> Export            | <input checked="" type="checkbox"/> Share  |                                           |                                                                                       |
|               |                                          |               |                                            |                                            |                                           |                                                                                       |
| Project Type  | Projects User                            | 0             | <input checked="" type="checkbox"/> Select | <input checked="" type="checkbox"/> Read   | <input checked="" type="checkbox"/> Write |   |
|               | <input type="checkbox"/> Only If Creator |               | <input checked="" type="checkbox"/> Create | <input type="checkbox"/> Delete            | <input checked="" type="checkbox"/> Print |                                                                                       |
|               |                                          |               | <input checked="" type="checkbox"/> Email  | <input checked="" type="checkbox"/> Report | <input type="checkbox"/> Import           |                                                                                       |
|               |                                          |               | <input checked="" type="checkbox"/> Export | <input checked="" type="checkbox"/> Share  |                                           |                                                                                       |
|               |                                          |               |                                            |                                            |                                           |                                                                                       |
| Task Type     | Projects User                            | 0             | <input checked="" type="checkbox"/> Select | <input checked="" type="checkbox"/> Read   | <input checked="" type="checkbox"/> Write |  |
|               | <input type="checkbox"/> Only If Creator |               | <input checked="" type="checkbox"/> Create | <input type="checkbox"/> Delete            | <input checked="" type="checkbox"/> Print |                                                                                       |
|               |                                          |               |                                            |                                            |                                           |                                                                                       |
|               |                                          |               |                                            |                                            |                                           |                                                                                       |
|               |                                          |               |                                            |                                            |                                           |                                                                                       |