

Part 1: Custom Fields and Forms

E

> Customize Form

Q Search or type a command (Ctrl + G)

Help

A

Customize Form - Customer

Customize Child TableActionsShow PreviewUpdate

DetailsForm

DetailsDashboardAddress & ContactTaxAccountingSales TeamSettingsPortal UsersAdd tab

represents company

Add field

No Data

Add field

More Information

Market Segment

Industry

Customer POS id

Website

Print Language

Customer Anniversary \*

Add field

Customer Details

Additional information regarding the customer.

Add field

Select a field to edit its properties.

New Customer

Customer Name \*

Customer Type \*

Company

Customer Anniversary \*

Primary Contact Details

Primary Address Details

Edit Full Form

Save

```
/home/practice/frappe-bench/apps/serverscript/serverscript/customization/customer_aniversary.py
```

● Message

×

Customer Anniversary cannot be a future date.

Raju

Customer Type \*

Individual

Customer Anniversary \*

25-07-2024

Primary Contact Details

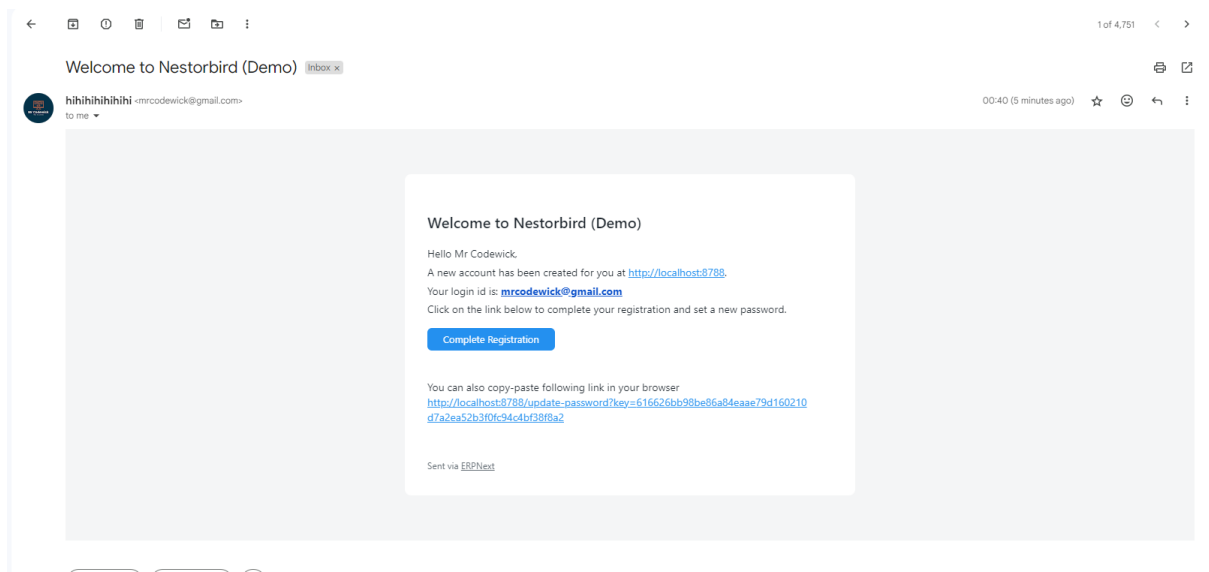
▼

Primary Address Details

▼

Edit Full Form

Save



## Part 2: Workflows

# Sales Order SAL-ORD-2024-00008 Approved Inbox x



**hihihihihihhi** <mrcodewick@gmail.com>  
to me ▾

Ram Ram Bhai Sareiyan n

The sales order SAL-ORD-2024-00008 has been approved.

Order Details:

**Sales Order:** SAL-ORD-2024-00008

**Date:** 2024-07-13

**Total Amount:** 811.0

Please review the sales order and confirm.

Thank you,

NestorBird

Sent via [ERPNext](#)

## Part 3: Print Formats

ERPNext

Customize Form

Search or type a command (Ctrl + G)

Help

Sales Invoice

Not Saved

Customize Child Table

Actions

Show Preview

Update

Details

Form

Details

Payments

Address & Contact

Terms

More Info

Connections

Customer Name

Tax Id

Company

Company Tax ID

Add field

Payment Due Date

Customer Anniversary

Add field

Is return (Credit note)

Return Against

Update Outstanding for Self

Update Billed Amount in Sales Order

Update Billed Amount in Delivery Note

Is Rate Adjustment Entry (Debit Note)

Amended From

Add field

Accounting Dimensions

Cost Center

Project

Add field

Search properties...

Options

Fetch From

Customer (customer)

Customer Anniversary (Date)

Fetch on Save if Empty

Depends On



2

Change

Assigned To

Attachments

Tags

Share

0 · 0

FOLLOW

You last edited this · 7 minutes ago

You created this · 15 hours ago

2312

Enabled

View

Actions

Duplicate

<

>

...

Save

Details

Dashboard

Inventory

Accounting

Purchasing

Sales

Tax

Quality

Manufacturing

Item Name

2312

Item Group \*

Consumable

Default Unit of Measure \*

Nos

Item Child

	quantity	unit cost	total cost	
<input type="checkbox"/>	10	10	100	
<input type="checkbox"/>	20	20	400	

Add Row

☐ Disabled

☐ Allow Alternative Item

☒ Maintain Stock

☐ Has Variants

If this item has variants, then it cannot be selected in sales orders etc.

Valuation Rate

0.00

☐ Is Fixed Asset

Over Delivery/Receipt Allowance (%)

0.000

Over Billing Allowance (%)

0.000

Description

Units of Measure

customer\_aniversary.py Uemail.py Uitem\_sum.js Uitem\_sum.py Upurchase\_mail.py Xhooks.py M

apps > serverscript > customization > purchase\_mail.py

1

# purchase\_order.py

2

import frappe

3

def send\_notification\_email(doc, method):

4

supplier\_email = "mrcodewick@gmail.com"

5

if supplier\_email:

6

subject = f"Purchase Order {doc.name} Submitted"

7

message = f"""

8

<p>Dear {doc.supplier\_name},</p>

9

<p>Apka Data {doc.name} has been submitted.</p>

10

<p>Order Details:</p>

11

<p><strong>Purchase Order:</strong> {doc.name}</p>

12

<p><strong>Date:</strong> {doc.transaction\_date}</p>

13

<p><strong>Total Amount:</strong> {doc.grand\_total}</p>

14

<p>Please review the purchase order and confirm.</p>

15

<p>Thank you,</p>

16

<p>Mr Codewick</p>

17

"""

18

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

Purchase Order PUR-ORD-2024-00012 Submitted Inbox x



hihihihihihhi <mrcodewick@gmail.com>  
to me ▾

Dear Nestorbird Pvt Ltd,

Apka Data PUR-ORD-2024-00012 has been submitted.

Order Details:

**Purchase Order:** PUR-ORD-2024-00012

**Date:** 2024-07-13

**Total Amount:** 300.0

Please review the purchase order and confirm.

Thank you,

Mr Codewick

Sent via [ERPNext](#)

Part 5: Permissions

E

Search or type a command (Ctrl + G)

Help A

Role Permissions Manager

Set User PermissionsRestore Original Permissions+ Add A New Rule

ProjectRoles

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