



Let's use it conveniently

basic guidebook

vol. 06

Action

Here, we will use the “Order-management application” to explain the Action function, which re-uses record data to copy to other applications!

*Solve
common
problems!*

It's a lot of work entering customer information every time they place an order...

We already manage our client information with a different application, so I want to copy the information from there.



Before Implementing Actions



Order Management App

- Customer information was manually entered every time an order was made
- Entering information is time consuming and inefficient
- There are risks of mistakes and discrepancies depending on the person entering the information

The screenshot shows the 'Order Management' app interface. At the top, there are 'Cancel' and 'Save' buttons. Below them are input fields for 'Reception date' (2017-04-20) and 'Receptionist' (Yudai Shibutani). A text box highlights the customer information fields: 'Client' (Bozu Trading Company), 'Department' (General affairs), 'Person in charge' (Susumu Tanaka), 'E-mail' (tanaka@bouzu.co.jp), and 'Telephone' (03-1234-5678). At the bottom, there is a table with columns for 'Product code', 'Product name', 'Unit price', 'Quantity', and 'Subtotal'. The table contains one row with a 'Lookup' button, a 'Clear' button, and a 'YEN' button.

Product code	Product name	Unit price	Quantity	Subtotal
<input type="text"/>				

Customer information was manually entered every time an order was made

After implementing Actions



Order Management App

- Copy the necessary information from the “Customer List” App with **Action**
- Manual entry is eliminated, saving time and increasing efficiency
- Mistakes are eliminated, names consolidated

Customer list

Customer list > (All fields) > 1

An app for recording customer information such as company name and contact information. It is possible to do searches for keywords and narrow down customers based on criteria such as region. Information can be imported or exported to or from a CSV file. ※You can further customize this app using the sample JavaScript codes or plug-ins that have been shared.

Register to order management

Customer number
13

Client
Bozu Trading Company

Department
General affairs

Person in charge
Susumu Tanaka

Postal code
103-6028

Address
2-7-1, Nihonbashi, Chuo-ku, Tokyo

Representative
Noboru Sato

Telephone
03-1234-5678

FAX

E-mail
tanaka@bouzu.co.jp

You can copy necessary information from the "Customer List" App and register as a record in the "Order Management" App!

Order reception

Order reception

Cancel Save

Reception date
2017-04-20

Receptionist
Yudai Shibutani

Client
Bozu Trading Company

Department
General affairs

Person in charge
Susumu Tanaka

E-mail
tanaka@bouzu.co.jp

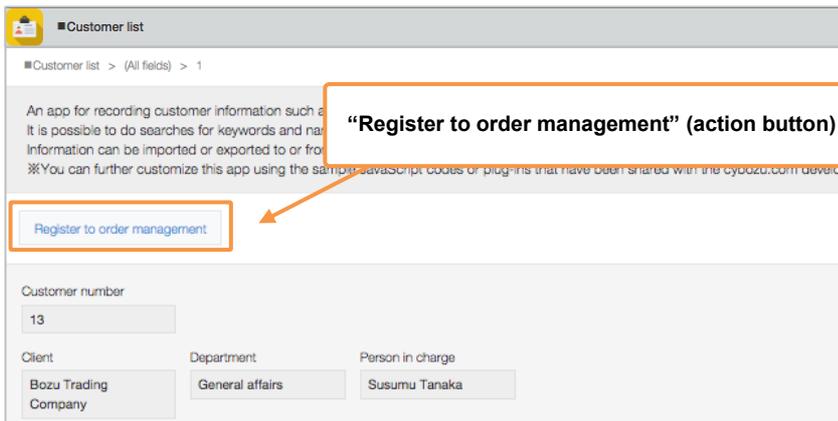
Telephone
03-1234-5678

Product code	Product name	Unit price	Quantity	Subtotal
<input type="text"/>	<input type="text"/>	YEN	<input type="text"/>	#/N/A YEN

How to set up Actions

When using “Actions” function, you can re-use record data from Apps, and copy them to **other Apps**. For example, you can copy client information from the “Customer List App” to the “Order Management App”, and register records.

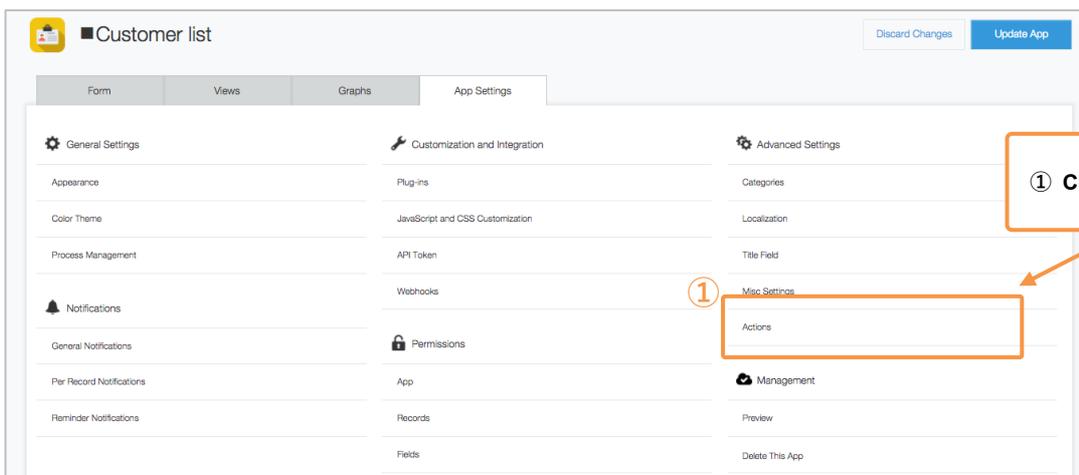
【Completed image】



1. Action settings

① Open the Action settings screen from copy source App

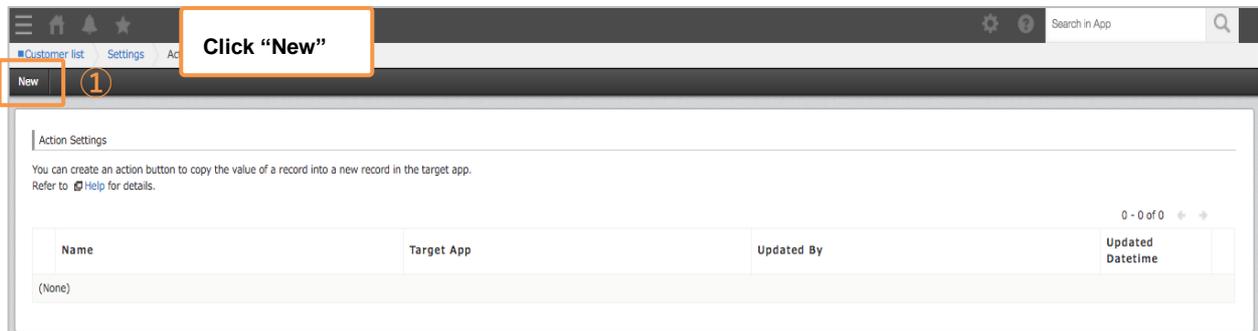
Open the settings screen for the “Customer List App” (**copy source App**) and **Click [Action]** from **[Settings]**.



2. Create Action

① Open the Action settings screen

Click **[New]**, located at the top left of the screen



② Enter an action name

Enter **“Register to order management”** as the Action name here. The Action name will be the name of the button, displayed on the records.

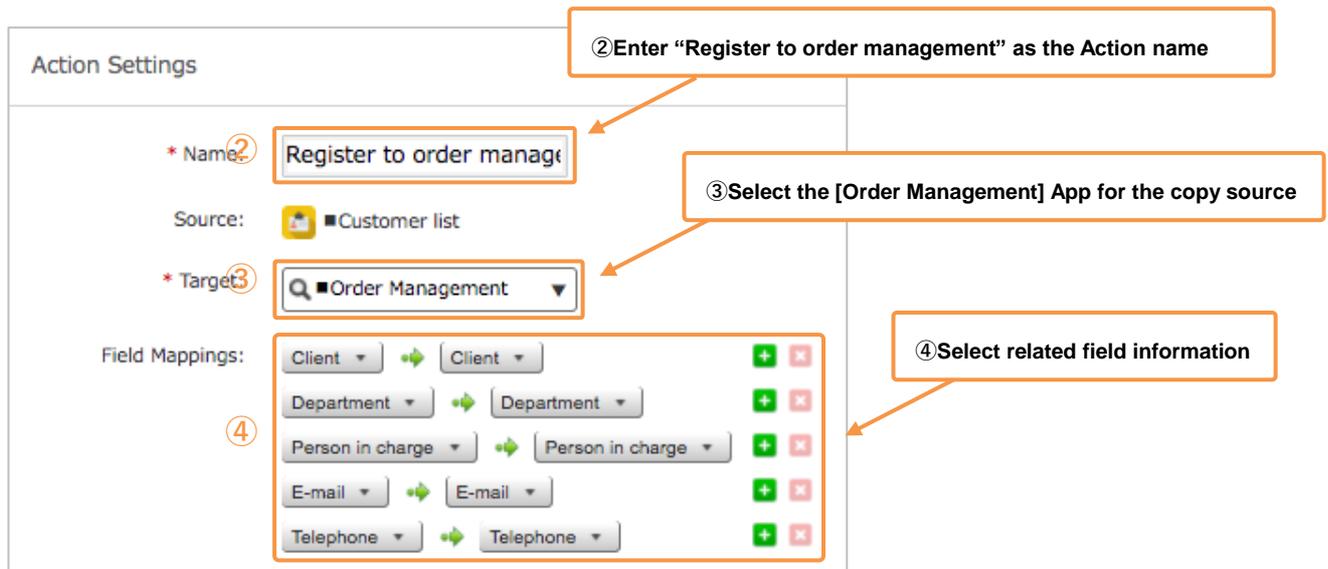
③ Select a copy source

Select a data copy source. Here, we will select the **[Order Management]** App.

④ Select related **field** information

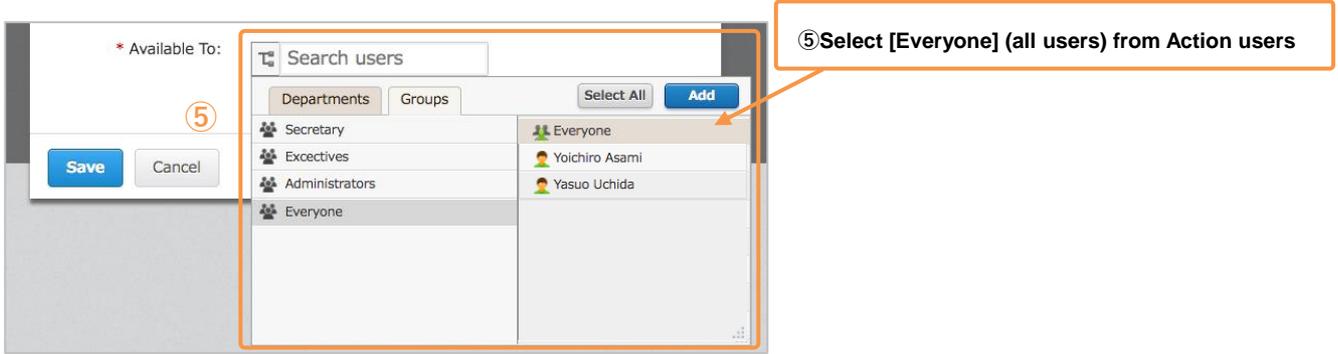
Designate the combination of data you wish to copy and the copy source field. In this example, we will select **[Client], [Department], [Person in charge], [Telephone],** and **[Email]**.

※Field values included in tables cannot be copied.



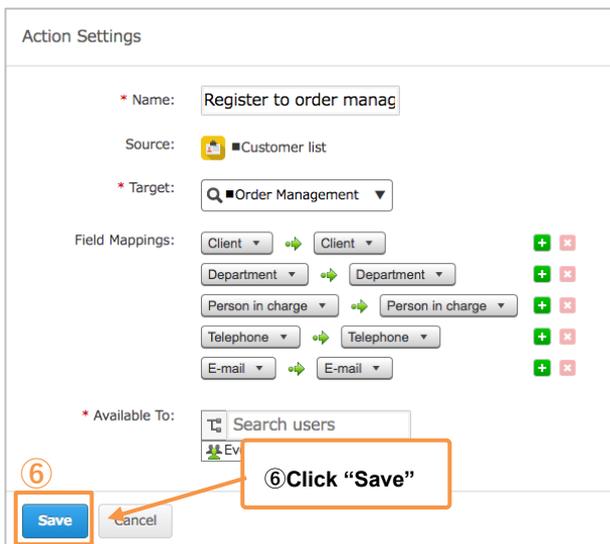
⑤ Select **Action users**

Select users, departments, or groups that can use Actions. In this example, we will select **[Everyone]** (all users) from **[Groups]**.



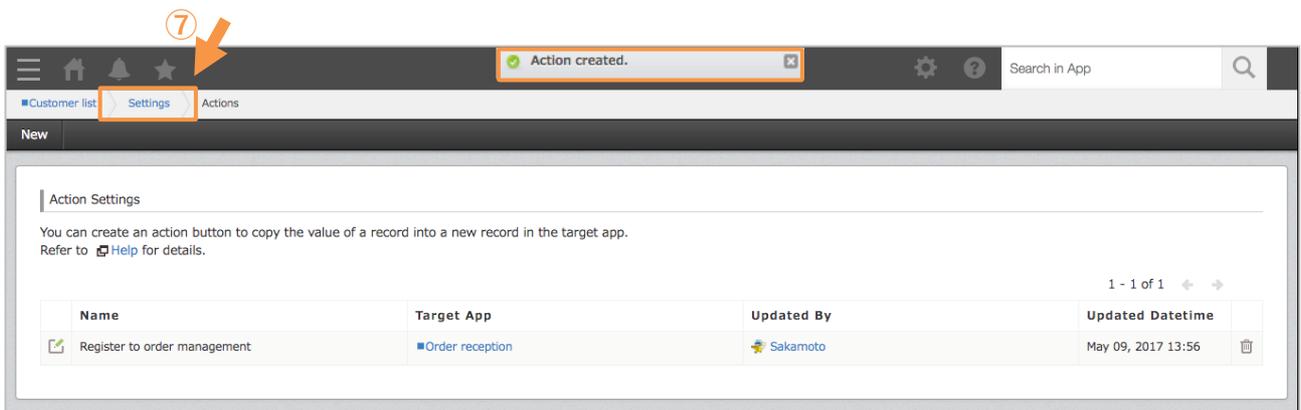
⑥ Save

Click **[Save]**.



⑦ Return to the App settings screen

"Action created" will appear at the top of the screen. Click **[settings]** at the top left of screen, and move to the App settings screen.



⑧ Complete App settings

Click **[Activate App]**, and apply it to the operating environment.

Your Action setup is now completed!

Customer list > (All fields) > 1

An app for recording customer information. It is possible to do searches for keywords and information can be imported or exported to and from a CSV file. You can further customize this app using the sample JavaScript codes or plug-ins that have been shared with the cybozu.com developer.

“Register to order management” (action button) is displayed on the record detail screen

Register to order management

Customer number
13

Client
Bozu Trading Company

Department
General affairs

Person in charge
Susumu Tanaka

Postal code
103-6028

Address
2-7-1, Nihonbashi, Chuo-ku, Tokyo

Representative
Noboru Sato

Telephone
03-1234-5678

FAX

E-mail
tanaka@bouzu.co.jp

Project list

Reception date	Receptionist	Person in charge	Total amount
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• Note on Action

※"Radio Button", "Check box", "Multi-choice", "Drop-down" and "Attachment" can not be specified in the field to be copied

※The values of the fields included in the table and "Related Records" can not be copied.

※in guest space, you can specify only Apps within the same guest space.



Let's Try using Actions!

Let's use Actions to copy "Customer List App" record data, and register records to the "Order Management App".

Customer list

Customer list > (All fields) > 1

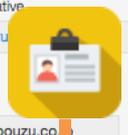
An app for recording customer information such as company name and contact information. It is possible to do searches for keywords and narrow down customers based on criteria such as region. Information can be imported or exported to or from a CSV file.
※You can further customize this app using the sample JavaScript codes or plug-ins that have been shared with the cybozu.com developer network.

[Register to order management](#)

Customer number
13

Client	Department	Person in charge
Bozu Trading Company	General affairs	Susumu Tanaka
Postal code	Address	Representative
103-6028	2-7-1,Nihonbashi,Chuo-ku,Tokyo	Noboru
Telephone	FAX	E-mail
03-1234-5678		tanaka@bouzu.co.jp

① Click the Action button (Register to order management)



Order Management

Order Management

Cancel Save

Reception date: 2017-05-17
Receptionist: Yudai Shibutani

Client	Department	Person in charge
Bozu Trading Company	General affairs	Susumu Tanaka
E-mail	Telephone	
tanaka@bouzu.co.jp	03-1234-5678	

Product code	Product name	Unit price	Quantity	Subtotal
<input type="text"/>	<input type="text"/>	<input type="text"/>	YEN <input type="text"/>	#/N/A/ YEN <input type="text"/>

② Necessary information from the "Customer list App" can be copied, and records can be registered to the "Order Management App".

Example uses of Actions

- Applicant management → Interview management

Copy applicants who passed the screening from the “Applicant management” App to the “Interview management” App.

Interview management

Interview applicant

Result
Passed the screening documents

Target year: 2017 Category(New graduates or Career): Career Date of application: Dec 16, 2016

Full name: Yudai Shibutani First name: Yudai Last name: Shibutani

Sex: Man Birthday: May 09, 1985

Address: 2-7-1, Nihonbashi, Tokyo

Interview management

Interview date: Status of interview * : Done Not yet Cancelled Interviewer:

▼ Information on interviewee

Target year: 2017 Category(New graduates or Career): Career Date of application: 2016-12-16

Full name: Yudai Shibutani First name: Yudai Last name: Shibutani

Sex: Man Birthday: 1985-05-09 Address: 2-7-1, Nihonbashi, Tokyo

▼ Interview details • Result

Interview type:

When using Actions function, you don't have to repeatedly enter the same information!

