



Let's use it conveniently



basic guidebook

vol. 09

# Notifications

Here, we will explain how to set notifications, which will send necessary information accurately, according to the delivery conditions and dates, using the "general affairs request application" as an example!

Solve  
common  
problems!

I want to prevent errors and omissions.

I wonder if I can set notifications so that I can make sure the information I want to communicate will be sent securely, based on certain conditions?



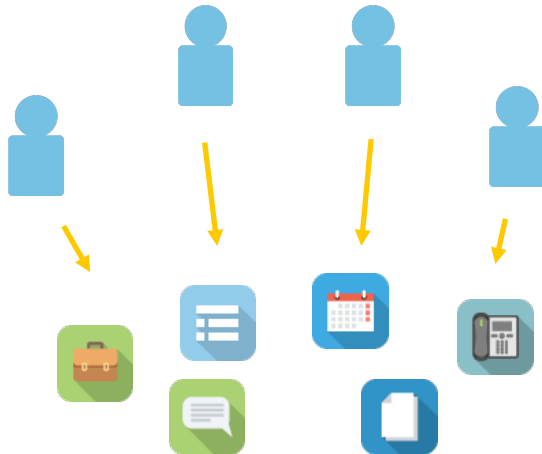
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# Before implementing notifications

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Nobody notices records, even if they are registered in the app

Checking has to be done manually, leading to omissions



- Tasks that must be done are late.
- Tasks are forgotten.

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# After implementing notifications

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Notifications are sent out to the necessary users from the app, which helps **prevent errors and omissions.**



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# About notifications

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In kintone, you can set notifications to be sent to users whenever records have been edited in the app, or when comments have been left on records.

Additionally, notifications can be sent as reminders based on date and time information in the record.

## | Notification settings patterns

When you set “**Notifications**” in the app, notifications will be sent to users in the following situations.

- ① **General Notifications**

When data has been edited in the app

Example: When data (records) are added to the app, when records have been edited, etc.

Notifications operation target

[Record is added] [Record is edited] [Comment is posted] [Status is changed] [File imported]

- ② **Per Record Notifications**

When data in the app has fulfilled a certain condition

Example: When amounts of 1 million yen or more are entered in the cost item.

- ③ **Reminder Notification**

When the date is past the app’s date/time item

Example: When the date/time passes the ToDo deadline

## | Notification target

Notifications can be sent to an “Department” “Group,” or “User.”

When you have set a user selection field in the form, you can send notifications to a selected “User” (similarly with the “Department” selection field and “Group” selection field).

In the default notifications settings, whenever a comment is left on a record, notifications will be sent to the following users:

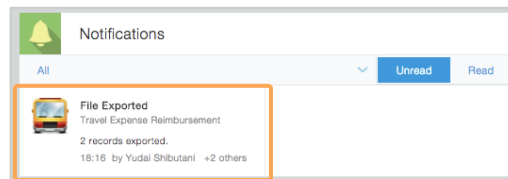
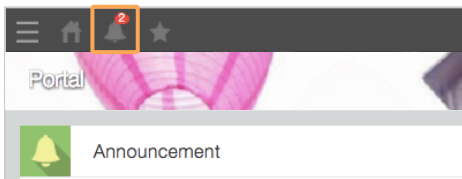
- The creator of that record
- Users who have commented on that record

## Notification methods

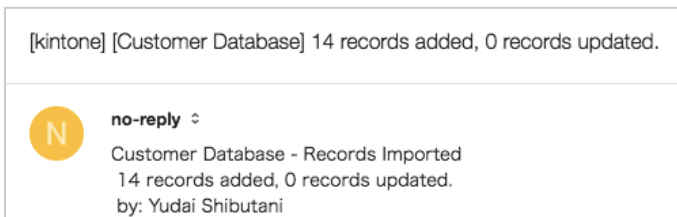
App notifications will be displayed at the target user's portal (kintone top page), or in the "Notifications" page as notifications addressed to you.

Moreover, when the kintone manager has turned on the e-mail notifications function, users that have turned on **E-mail notifications** in their personal settings will receive e-mail notifications.

(Users will be informed when records have been edited, or when comments have been left. For details regarding the record, open kintone to confirm.)



E-mail notification example:



- Send notifications when certain operations are made
- Send notifications when records with certain conditions are registered
- Send notifications when a designated date and time has passed

The above three notification patterns are available, so use them accordingly to your needs.



# How to set notifications

Here, we will use the “General Affairs Help Desk” as an example to show you how to set notifications.

Let’s set our notifications divided into three settings patterns.

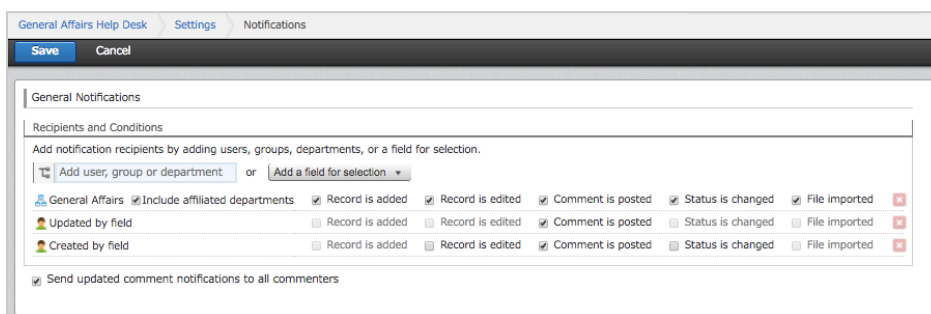
## ① Setting app notification conditions

Here, we will set the app notification conditions. You can set notifications to be sent to specific recipients when certain operations are made in the app. The target operation is as follows.

**[Record is added] [Record is edited] [Comment is posted] [Status is changed] [File imported]**

In this example, we will set notifications to be sent to the members of the “General Affairs Department” when the following operations are made in the “General affairs request app.”

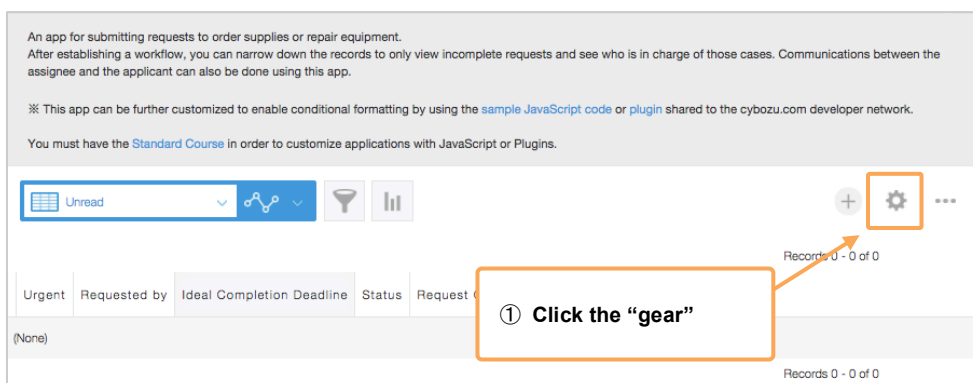
[Completed Image]



### • 1. Display the settings screen for app access permission

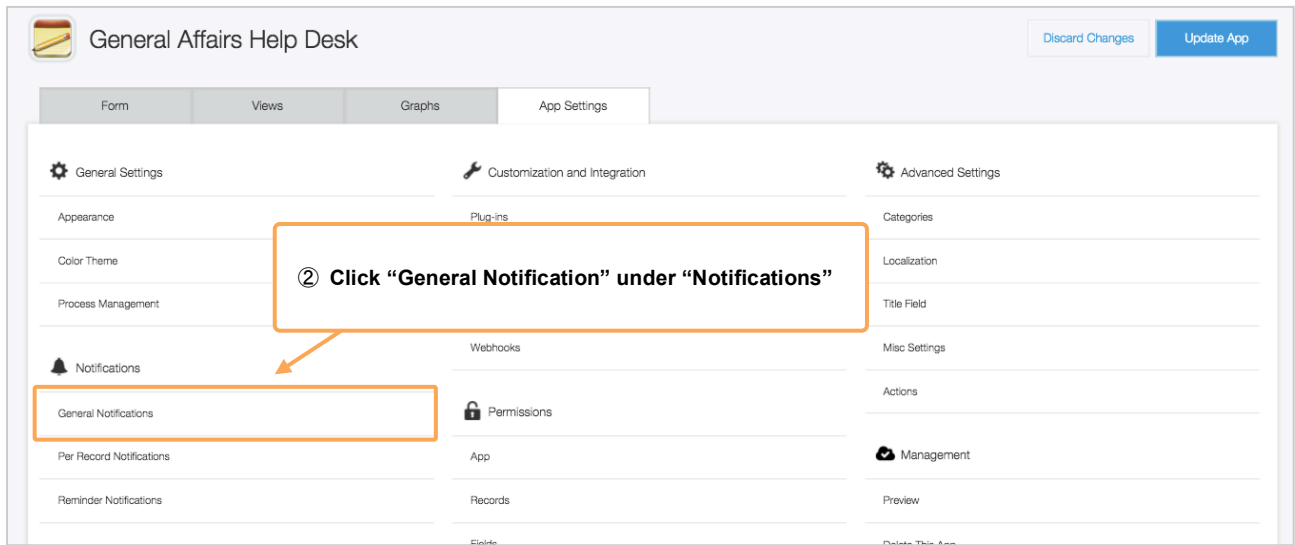
#### ① Open the app settings screen

Click the **[gear]** in the app list screen

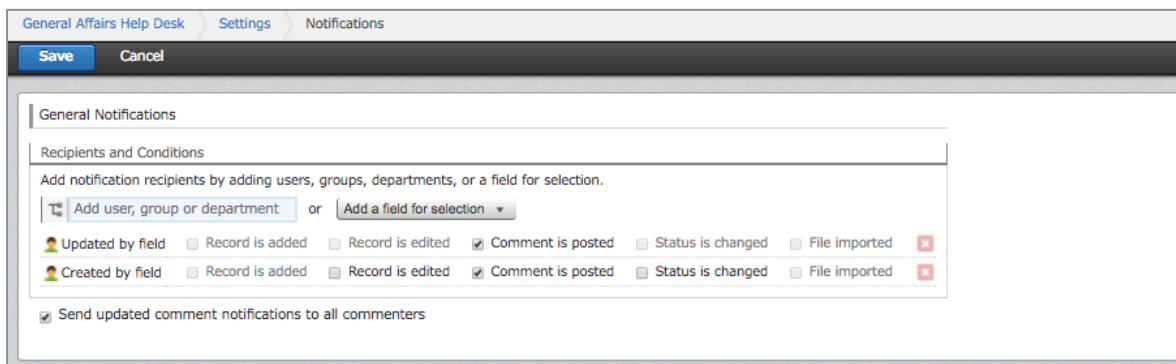


## ② Open the app notification conditions settings screen

The app's management screen will be displayed. From here, click **[General Notifications]** under **[Notifications]**.



The app's general notifications settings screen is displayed.



## • 2. Setting up the app notification conditions

### ① Add the General Affairs Department

Set "User," "Group," or "Department" as the notification recipients in "notification recipients." You can also select a user as the notification recipients by selecting the user from the dropdown list, under "Add a field for selection."

In this example, we will click **[Add user, group or department]**, and add the General Affairs (department).

General Affairs Help Desk Settings Notifications

Save Cancel

General Notifications

Recipients and Conditions

Add notification recipients by adding users, groups, departments, or a field for selection.

general affairs or Add a field for selection

General Affairs is added

Record is edited ☐ Comment is posted ☒ Status is changed ☐ File imported ☐

Created by field ☐ Record is added ☐ Record is edited ☐ Comment is posted ☒ Status is changed ☐ File imported ☐

☒ Send updated comment notifications to all commenters

The “General Affairs” has been added.

General Affairs Help Desk Settings Notifications

Save Cancel

General Notifications

Recipients and Conditions

Add notification recipients by adding users, groups, departments, or a field for selection.

Add user, group or department or Add a field for selection

General Affairs ☒ Include affiliated departments ☒ Record is added ☐ Record is edited ☐ Comment is posted ☒ Status is changed ☒ File imported ☐

Updated by field ☐ Record is added ☐ Record is edited ☐ Comment is posted ☒ Status is changed ☐ File imported ☐

Created by field ☐ Record is added ☐ Record is edited ☐ Comment is posted ☒ Status is changed ☐ File imported ☐

☒ Send updated comment notifications to all commenters

② Set the notification conditions for the General Affairs Department

Check all the boxes for the “General Affairs Department.”

General Affairs Help Desk Settings Notifications

Save Cancel

General Notifications

Recipients and Conditions

Add notification recipients by adding users, groups, departments, or a field for selection.

Add user, group or department or Add a field for selection

General Affairs ☒ Include affiliated departments ☒ Record is added ☒ Record is edited ☒ Comment is posted ☒ Status is changed ☒ File imported ☐

Updated by field ☐ Record is added ☐ Record is edited ☐ Comment is posted ☒ Status is changed ☐ File imported ☐

Created by field ☐ Record is added ☐ Record is edited ☐ Comment is posted ☒ Status is changed ☐ File imported ☐

☒ Send updated comment notifications to all commenters

③ Save

Click [Save] on the upper left to save your settings.

General Affairs Help Desk Settings Notifications

**Save** Cancel

General Notification ③ Click "Save"

Recipients and Conditions

Add notification recipients by adding users, groups, departments, or a field for selection.

or

General Affairs	<input checked="" type="checkbox"/> Include affiliated departments	<input checked="" type="checkbox"/> Record is added	<input checked="" type="checkbox"/> Record is edited	<input checked="" type="checkbox"/> Comment is posted	<input checked="" type="checkbox"/> Status is changed	<input checked="" type="checkbox"/> File imported	
Updated by field		<input type="checkbox"/> Record is added	<input type="checkbox"/> Record is edited	<input checked="" type="checkbox"/> Comment is posted	<input type="checkbox"/> Status is changed	<input type="checkbox"/> File imported	
Created by field		<input type="checkbox"/> Record is added	<input type="checkbox"/> Record is edited	<input checked="" type="checkbox"/> Comment is posted	<input type="checkbox"/> Status is changed	<input type="checkbox"/> File imported	

☒ Send updated comment notifications to all commenters

The app's notification conditions have now been set.

### • Important points regarding notifications

Notifications will not be sent to the following users:

- The person who operated the record
- Users who do not have viewing permissions for the app or record

Notifications will not be sent when Excel or CSV files have been uploaded and registered as records, or when records are updated, even if the field value fulfills the notification settings conditions.





## ② Setting record notification conditions

Here we will set record notification conditions. Notifications will be sent to designated recipients when records in an app fulfill certain conditions.

In this example, let's set notifications to be sent to the "General Affairs Department" members when the "Urgent" check box is checked.

[Completed Image]

Per Record Notifications

Notification Trigger

Add

Urgent includes any of --

Urgent

Clear All

Recipient

Add notification recipients by adding users, groups, departments, or a field for selection.

Add user, group or department or Add a field for selection

General Affairs Include affiliated departments

Summary An urgent request has been registered! Please c

- 1. Display the record's notification conditions settings screen

① Open the record's notification conditions settings screen

Display the app's management screen, and from here, click **[Per Record Notification]**, under **[Notifications]**.

General Affairs Help Desk

Discard Changes Update App

Form Views Graphs App Settings

General Settings Customization and Integration Advanced Settings

Appearance Plug-ins Categories

Color Theme JavaScript and CSS Customization Localization

Process Management Title Field

Notifications Misc Settings

General Notifications Actions

Per Record Notifications

Reminder Notifications

Permissions App Management

Records Preview

Fields Delete This App

① Click "Per Record Notifications " under "Notifications"

The record's notification conditions settings screen is now being displayed.

General Affairs Help Desk Settings Notifications

Save Cancel

Per Record Notifications

Notification Trigger	Recipient
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Add

## • 2. Setting the record's notification conditions

### ① Add record conditions

Click **[Add]** to add record condition items.

General Affairs Help Desk Settings Notifications

Save Cancel

Per Record Notifications

Notification Trigger
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Add

① Click "Add"

### ② Add record conditions

Here, we will set the conditions for the records to send out notifications. You can also set combinations of multiple conditions.

Here, we will set the conditions for when the "Urgent" check box is checked.

General Affairs Help Desk Settings Notifications

Save Cancel

Per Record Notifications

Notification Trigger	Recipient
----------------------	-----------

Add

Record number = (equal to) [ ]

Add notification recipients by adding users, groups, departments, or a field for selection.

Add user, group or department or Add a field for selection

Summary

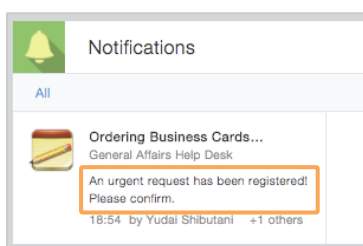
② Set the record conditions

### ③ Set notification content

Here, we will set the subject that will be displayed when notifications are sent.

In this example, we will enter “An urgent request has been registered! Please confirm.”

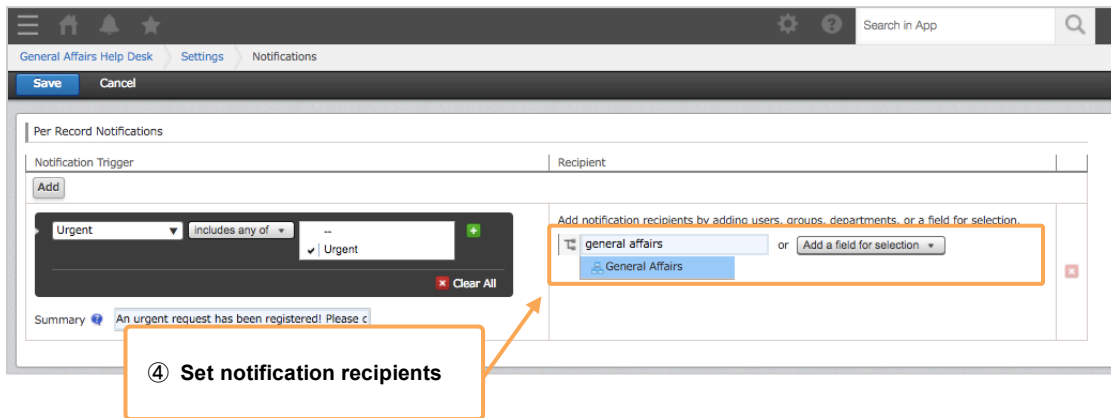
Display example:



### ④ Set notification recipients

Set “User,” “Group,” or “Department” as your “Notification recipients.” You can also select a user as the notification recipients by selecting the user from the dropdown list, under “Add a field for selection.”

In this example, click **[Add user, group or department]**, and add the General Affairs Department (Department).



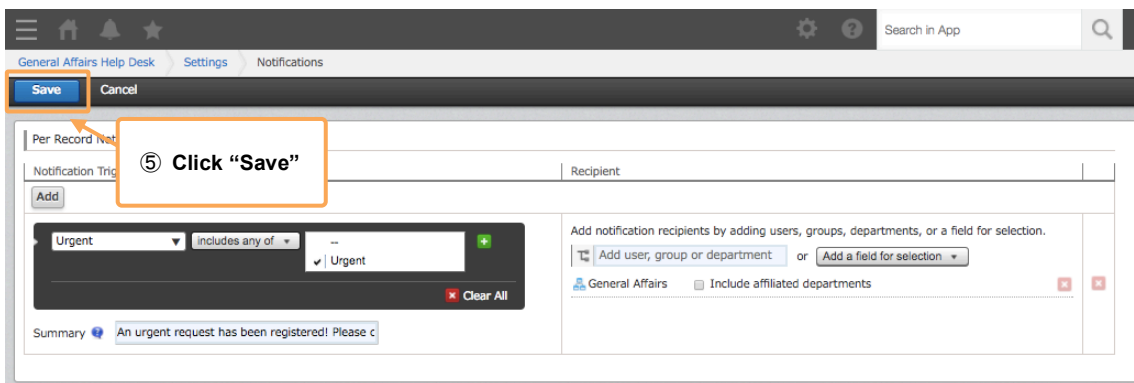
A notification recipient has been added.

\*Include affiliated departments: Check the boxes if you wish to apply the same settings to sub-department.



## ⑤ Save

Click [Save] on the upper left to save your settings.



The record's notification conditions are now set.

# Setting reminder notification conditions

By using the date and time field values, you can designate a date and time as conditions, and set up reminder notifications.

Because you can set the conditions as “x days before” or “x days after,” you can use reminder notifications in a variety of ways, such as sending notifications to confirm beforehand, or to send notifications when a certain period of time has passed.

In this example, we will set reminder notifications to be sent to “The person in charge” when it is “3 days before the desired delivery date.”

[Completed Image]

The screenshot shows the 'Reminder Notifications' configuration interface. At the top, there are 'Save' and 'Cancel' buttons. The main area is divided into two columns. The left column, titled 'Notification Trigger', contains an 'Add' button and a 'When' section. The 'When' section is configured with 'Ideal Completion Deadline' as the trigger, '3 days before' as the timing, and '9:00' as the time. Below this, a note says 'To send notifications today, enter 0 in the days field.' There is a 'Reminder Trigger' section with a 'New Trigger' link and a 'Summary' section showing 'It is 3 days before the desired delivery date.' The right column, titled 'Recipient', contains a section for adding recipients with options to 'Add user, group or department' or 'Add a field for selection'. 'Person in Charge' is listed as a recipient. At the bottom, there is a 'Reminder Time Zone' dropdown set to '(UTC+09:00) Osaka, Sapporo, Tokyo'.

- 1. Display the reminder notification conditions settings screen

① Open the reminder notification conditions settings screen

Display the app's management screen, and click **[Reminder Notifications]**, under **[Notifications]**.

The screenshot shows the 'General Affairs Help Desk' app management interface. At the top, there are 'Discard Changes' and 'Update App' buttons. Below the app name, there are tabs for 'Form', 'Views', 'Graphs', and 'App Settings'. The 'App Settings' tab is selected. The settings are organized into three columns: 'General Settings', 'Customization and Integration', and 'Advanced Settings'. Under the 'Notifications' section, there are 'General Notifications' and 'Per Record Notifications'. 'Reminder Notifications' is listed under 'Per Record Notifications' and is highlighted with an orange box. An orange arrow points from a text box labeled '① Click "Reminder notifications" under "Notifications"' to the 'Reminder Notifications' link.

The reminder notification conditions settings screen have been displayed.

The screenshot shows the 'Reminder Notifications' settings screen. At the top, there is a navigation bar with 'General Affairs Help Desk', 'Settings', and 'Notifications'. Below this, there are 'Save' and 'Cancel' buttons. The main section is titled 'Reminder Notifications' and contains a table with two columns: 'Notification Trigger' and 'Recipient'. An 'Add' button is located below the table. At the bottom, there is a 'Reminder Time Zone' dropdown menu set to '(UTC+09:00) Osaka, Sapporo, Tokyo'.

## • 2. Setting reminder notification conditions

### ① Add reminder conditions

Click **[Add]** to add reminder conditions.

This screenshot is similar to the previous one, but it includes an orange box around the 'Add' button and an arrow pointing to it with the text '① Click "Add"'. The 'Reminder Time Zone' dropdown menu is also visible at the bottom.

### ② Set notification timing

Here we will set the notification timing.

Choose a date and time from the “**Date and time**” field, and then select “**Days before**” or “**Days after**”, and the “**At**” for when notifications should be sent. In this example, we will set notifications to be sent at 9 a.m., three days after the “Desired delivery date.”

This screenshot shows the 'When' field in the 'Notification Trigger' column. It is set to 'Ideal Completion Deadline', '0 days', 'before', and '12:00'. An orange box highlights this field, and an arrow points to it with the text '② Set the notification timing'. The 'Recipient' column is empty, and the 'Reminder Time Zone' dropdown menu is at the bottom.

The notification timing has now been set.

\*If you wish to send notifications on the day, set the date as “0,”

General Affairs Help Desk > Settings > Notifications

**Save** **Cancel**

Reminder Notifications

Notification Trigger | Recipient

**Add**

**When**

Ideal Completion Deadline | 3 days | before | 9:00

To send notifications today, enter 0 in the days field.

Reminder Trigger

Add notification

Add user, group or department

### ③ Set notification content

Here, we will set the subject that will be displayed when notifications are sent. In this example, we will enter **“It is 3 days before the desired delivery date.”**

**Save** **Cancel**

Reminder Notifications

Notification Trigger | Recipient

**Add**

**When**

Ideal Completion Deadline | 3 days | before | 9:00

To send notifications today, enter 0 in the days field.

Reminder Trigger

New Trigger

**Summary** It is 3 days before the desired delivery date.

Reminder Time Zone (UTC+09:00) Osaka, Sapporo, Tokyo

③ Enter the notification content

### ④ Set notification recipients

Set “User,” “Group,” or “Department” as your “Notification recipients.” You can also select a user as the notification recipients by selecting the user from the dropdown list, under “Add a field for selection.”

In this example, click **[Add a field for selection]**, and add the field “Person in Charge.”

**Save** **Cancel**

Reminder Notifications

Notification Trigger | Recipient

**Add**

**When**

Ideal Completion Deadline | 3 days | before | 9:00

To send notifications today, enter 0 in the days field.

Reminder Trigger

New Trigger

**Summary** It is 3 days before the desired delivery date.

Reminder Time Zone (UTC+09:00) Osaka, Sapporo, Tokyo

④ Set notification recipients

Add notification recipients by adding users, groups, departments, or a field for selection.

Add user, group or department or Add a field for selection

Add a field for selection

Updated by

Created by

Assignee

Requested by

Person in Charge

“Person in Charge” has been added as a notification recipient.

Reminder Notifications

Notification Trigger | Recipient

Add

When

Ideal Completion Deadline | 3 days before | 9:00

To send notifications today, enter 0 in the days field.

Reminder Trigger

New Trigger

Summary It is 3 days before the desired delivery date.

Reminder Time Zone (UTC+09:00) Osaka, Sapporo, Tokyo

Add notification recipients by adding users, groups, departments, or a field for selection.

Add user, group or department or Add a field for selection

Person in Charge

## ⑤ Save

Click [Save] on the upper left to save your settings.

Reminder Notifications

Notification Trigger | Recipient

Add

When

Ideal Completion Deadline | 3 days before | 9:00

To send notifications today, enter 0 in the days field.

Reminder Trigger

New Trigger

Summary It is 3 days before the desired delivery date.

Reminder Time Zone (UTC+09:00) Osaka, Sapporo, Tokyo

Add notification recipients by adding users, groups, departments, or a field for selection.

Add user, group or department or Add a field for selection

Person in Charge

⑤ Click “Save”

The reminder notification conditions have now been set.



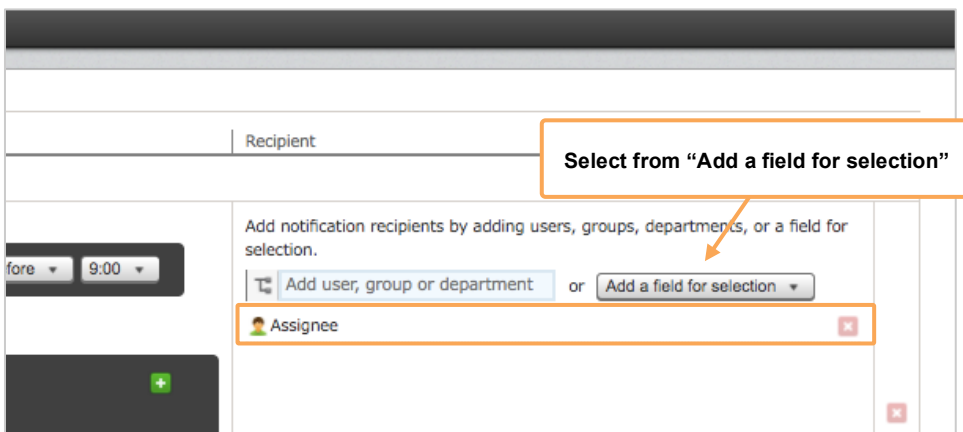
## Tips

- **Designating the creator, updater, or Assignee as a notification recipient**

You can designate the “**Created by,**” “**Updated by,**” or “**Assignee (process management worker)**” of the record as a notification recipient. Select from “**Add a field for selection.**”

- Created by: The user that created the record
- Updated by: The last user to update the record
- Assignee: The user that is in charge of the work in the current status in the process management

Example: Setting reminder notifications to be sent to the “Assignee” in an app with the process management function in effect

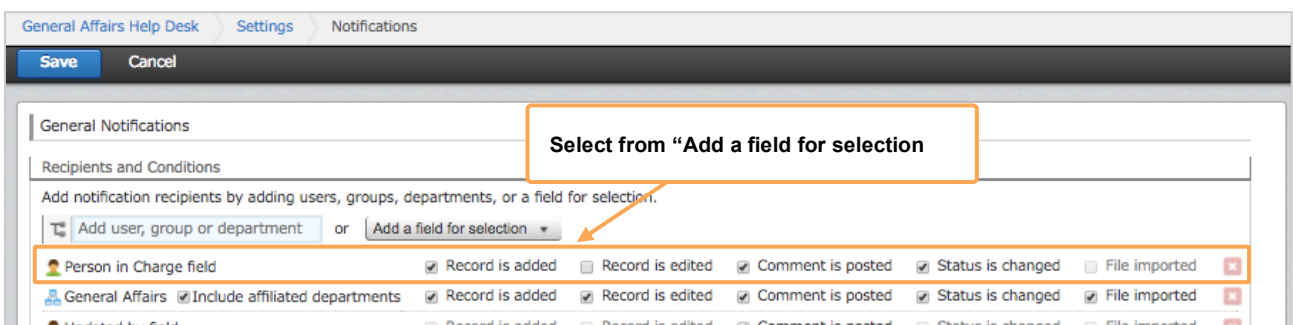


- **Designating User/Department selection field as notification recipients**

You can designate the “**User selection field**” or “**Department selection field,**” which you placed in your app form, and send notifications to selected users and departments per record.

Select a field from [Add a field for selection].

Example: Settings where notifications will be sent to a user who has been selected in user selection (Person in Charge)



- **Adding reminder notification conditions**

You can add further conditions to the reminder notification settings.

For example, you can set your records so that only incomplete records will send out notifications, while records with a “Status” of complete will not send notifications.

General Affairs Help Desk Settings Notifications

Save Cancel

Reminder Notifications

Notification Trigger

Add

When

Created datetime 7 days after At 9:00

To send notifications today, enter 0 in the days field.

Reminder Trigger

New Trigger

Summary Please confirm the record which is not working.

Reminder Time Zone (UTC+09:00) Osaka, Sapporo, Tokyo

General Affairs Help Desk Settings Notifications

Save Cancel

Reminder Notifications

Notification Trigger Recipient

Add

When

Created datetime 7 days after At 9:00

To send notifications today, enter 0 in the days field.

Reminder Trigger

Status includes any of

- Not Yet Started
- In Progress
- Confirming Completion
- Resolved

Clear All

Summary Please confirm the record which is not working.

Reminder Time Zone (UTC+09:00) Osaka, Sapporo, Tokyo

By combining the “Form field” and “Reminder notification conditions,” you can create even more flexible notification settings!

Please try it out when you’ve gotten familiar with setting notifications.

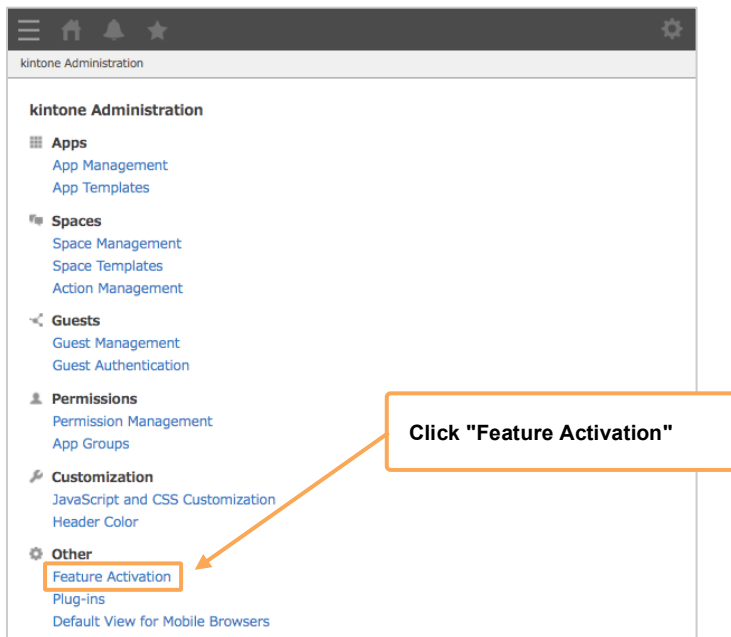


- **Enabling e-mail notifications**

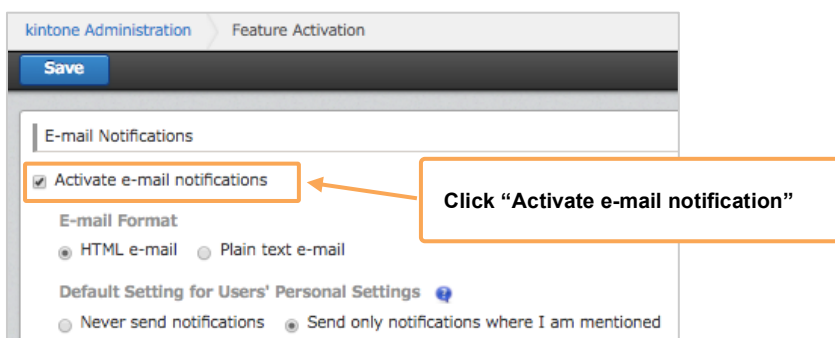
The kintone system manager must enable e-mail notifications.

① Open the kintone administration screen.

② Click [Other]>[**Feature Activation**].




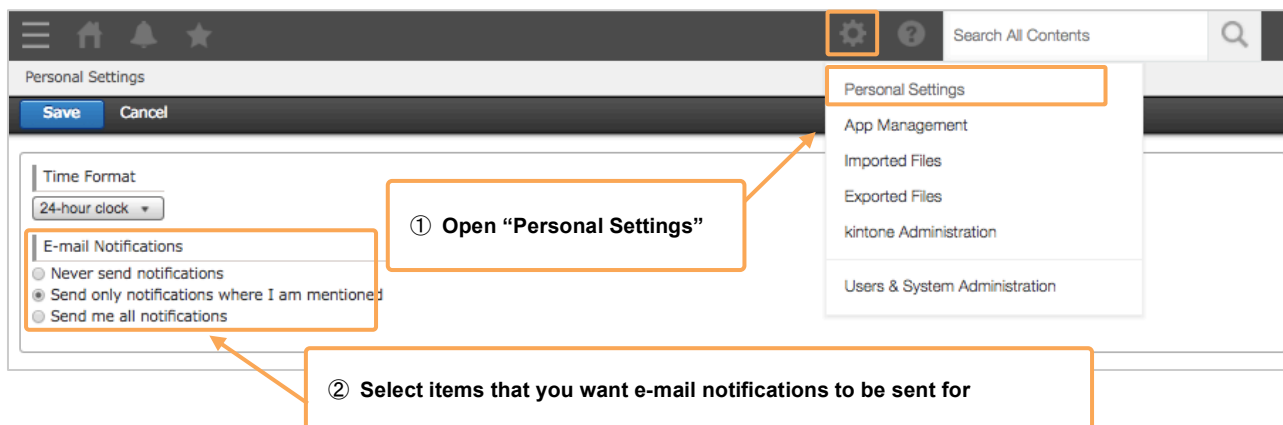
③ Select the [**Activate e-mail notifications**] check box, and select the e-mail format as well as the default setting for user's personal setting.



## • E-mail notification personal settings

Users can set personal settings to receive e-mail notifications or not.

- ① Open [Personal Settings] from the  mark at the top right of the screen.
- ② Under “E-mail Notifications,” select whether or not to receive e-mail notifications.



## • Receiving notifications on smartphones

You can receive notifications addressed to you as smartphone notifications in the “kintone Mobile” smartphone app.

For iPhone

<https://itunes.apple.com/jp/app/kintone/id674312865?mt=8>

For Android

<https://play.google.com/store/apps/details?id=com.cybozu.kintone.mobile&hl=ja>

