kintone

April 2021 edition

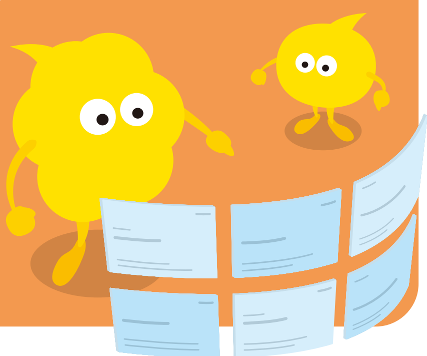
Let's use it conveniently basic guidebook vol. 05

Related record list

Here, we will use the "order reception application" to explain the related records list, which retrieves relevant information from other applications and displays it as a list.

Solve common problems!

I want to look up previously purchased products, but it's a lot of work having to find them... If only I could see our client purchase history as a list



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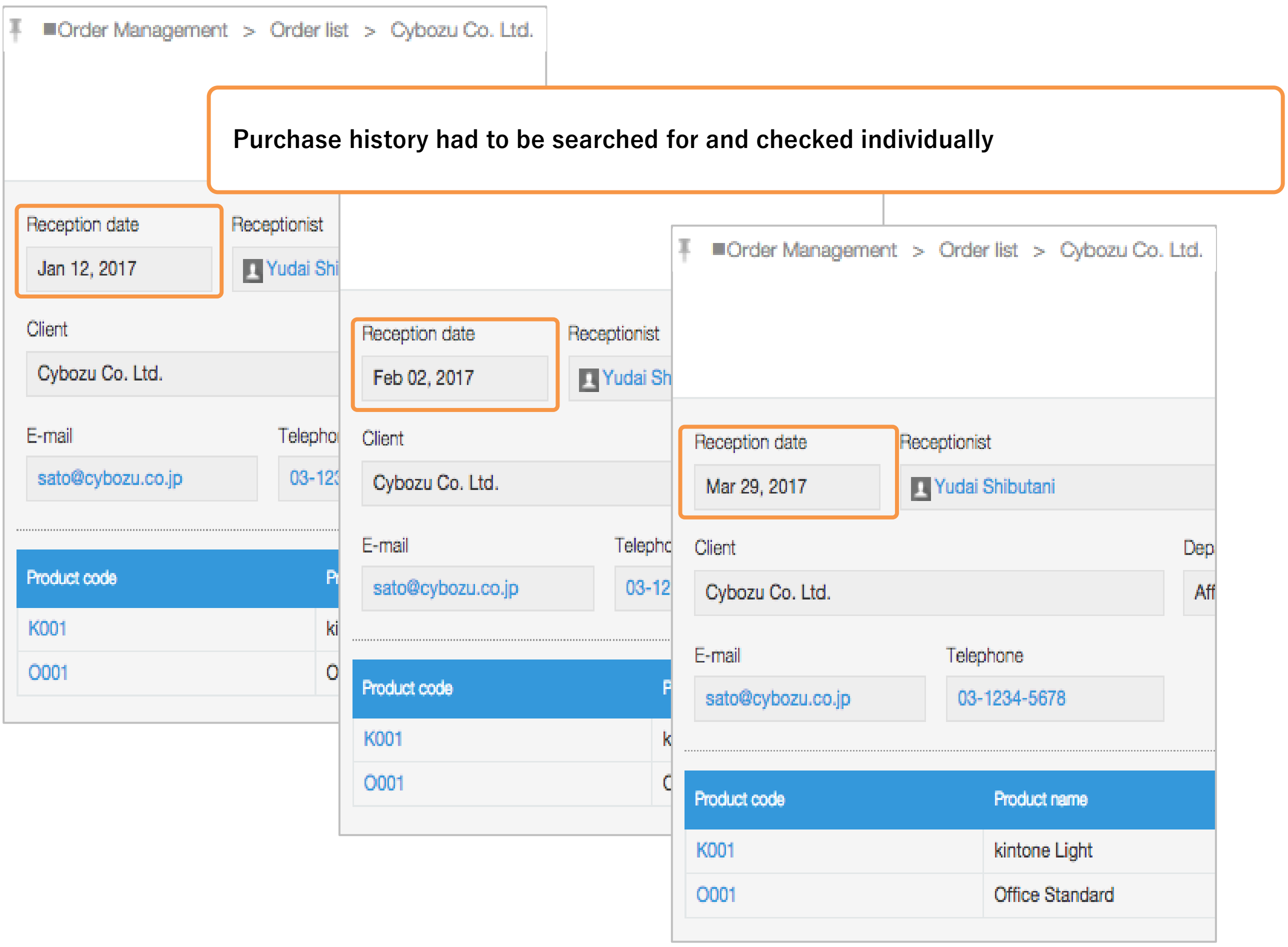
Before implementing the related records

Order Management App

・Related records needed to be searched for <u>individually</u>

→　When there are many items, it’s a lot of work just searching for things

→　It’s hard to look at because there is no way to display everything as a list



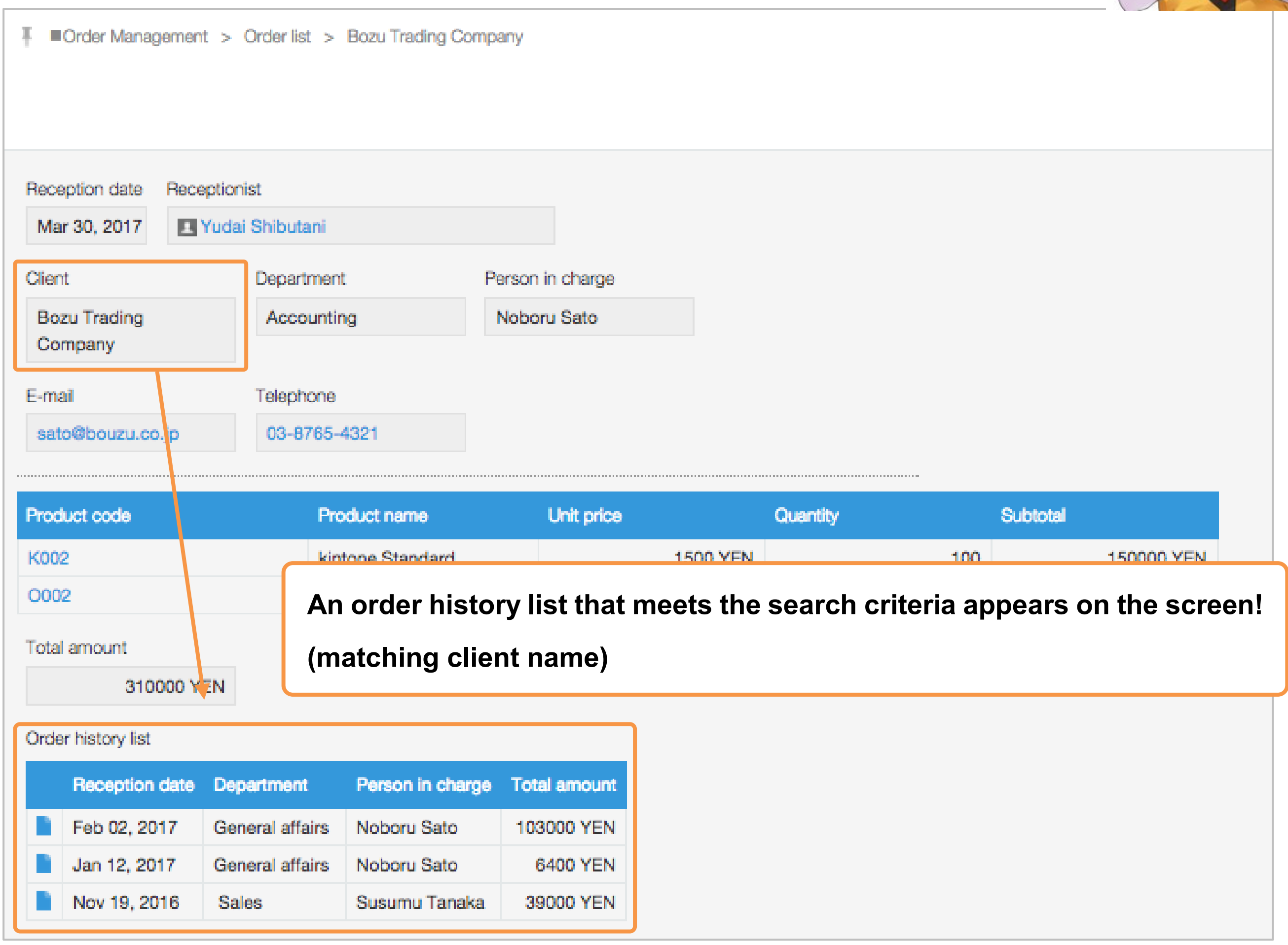
After implementing related records

Order Management App

・Previous order information is collectively displayed on the **related records**

→ You can directly click on information to display details

→ Related information can be displayed on a single screen



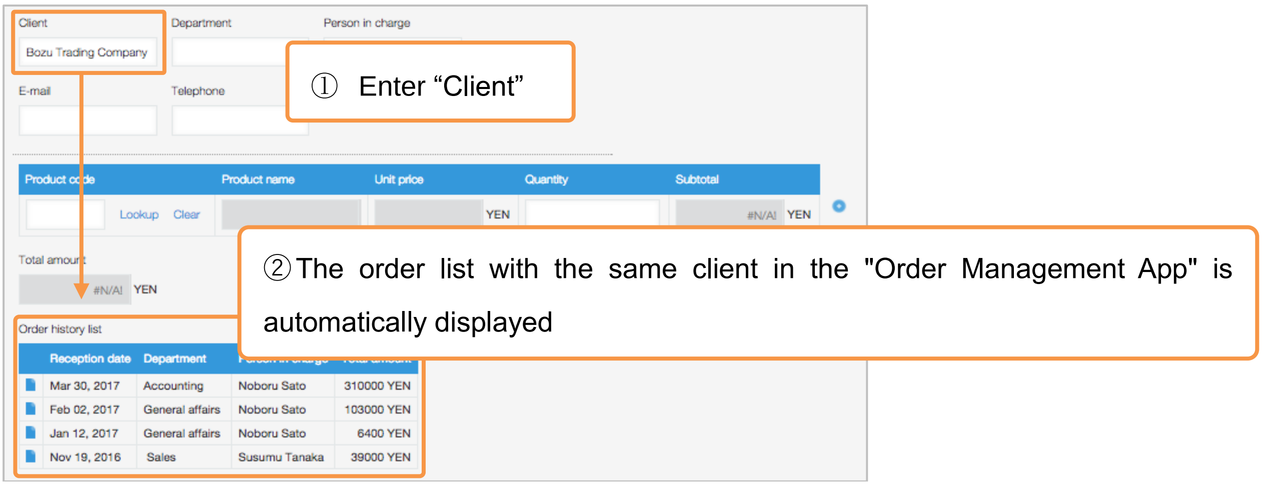
How to set up related records list

When you set up the “Related Records,” records that meet the conditions will be displayed as a list.

Not only will it display records from the same application, but it will also display records from other applications as well, making it a convenient function when you want to display all related information on one screen.

For example, you can show past order information from the same customer in the Order Management App form.

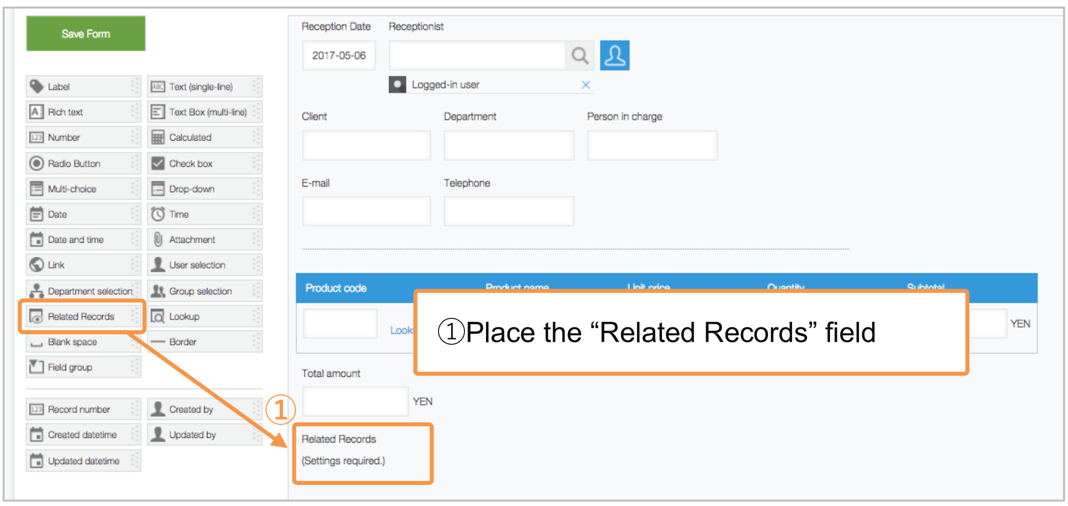
[Completed image]



1. Place the “Related Records” field

① Place the “Related Records” field

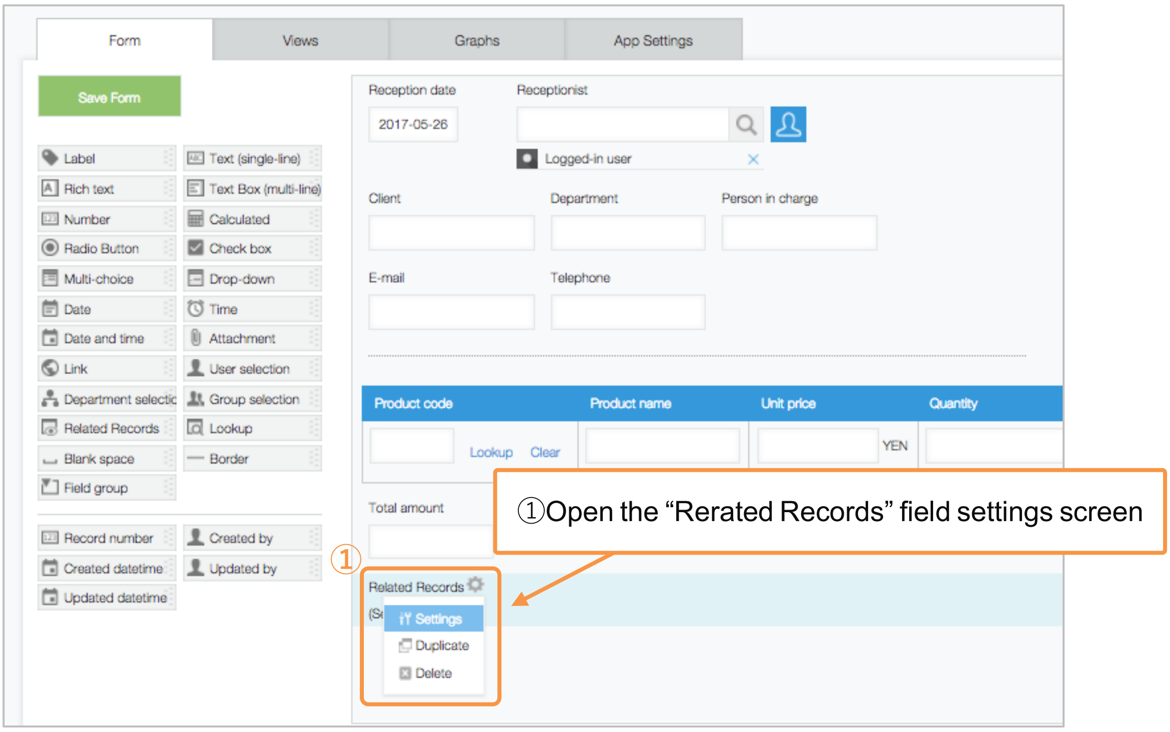
Place **[Related Records]** from the parts list on the left side of the screen.



2. Set up the “Related Records” field

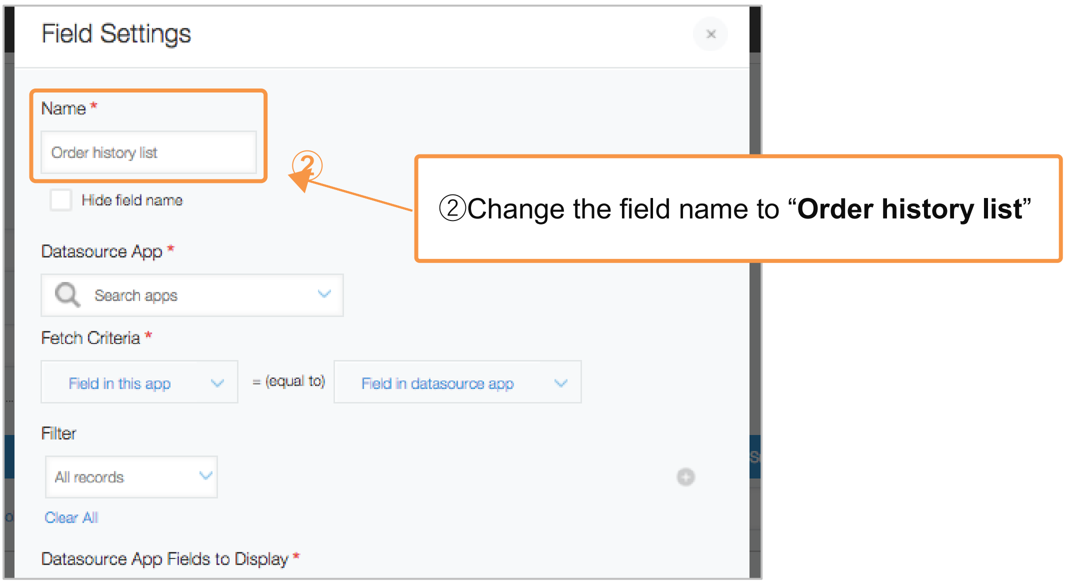
① Open the “Related Records” field settings screen

Displays the “Related Records” field settings screen



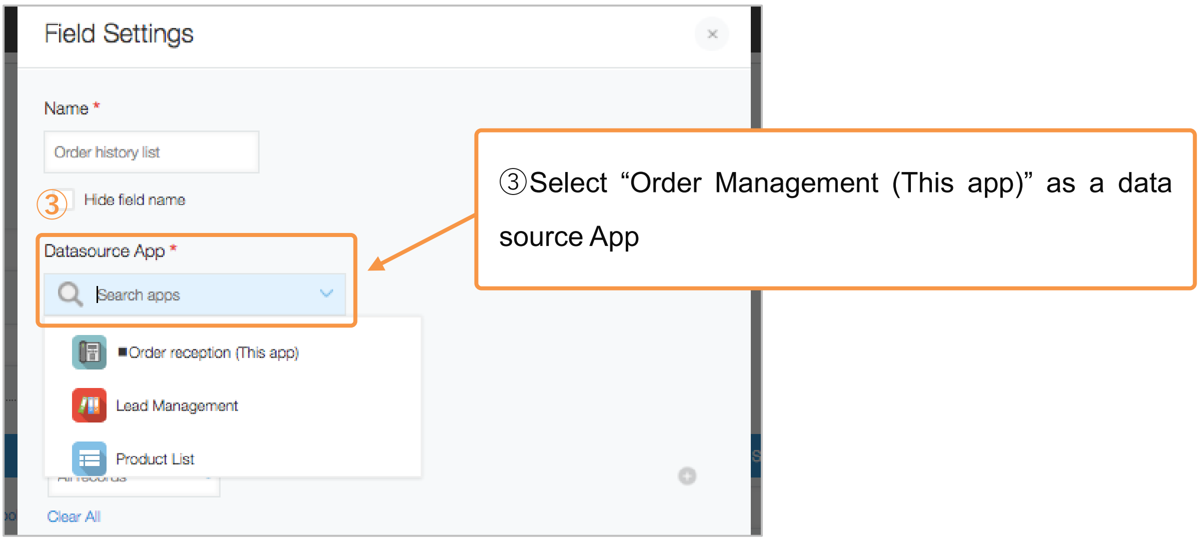
② Change the field name

Change the field name to **“Order history list.”**



③ Select a data source app

Select App you want to retrieve information from. In this example, we will select the **[Order Management App].**

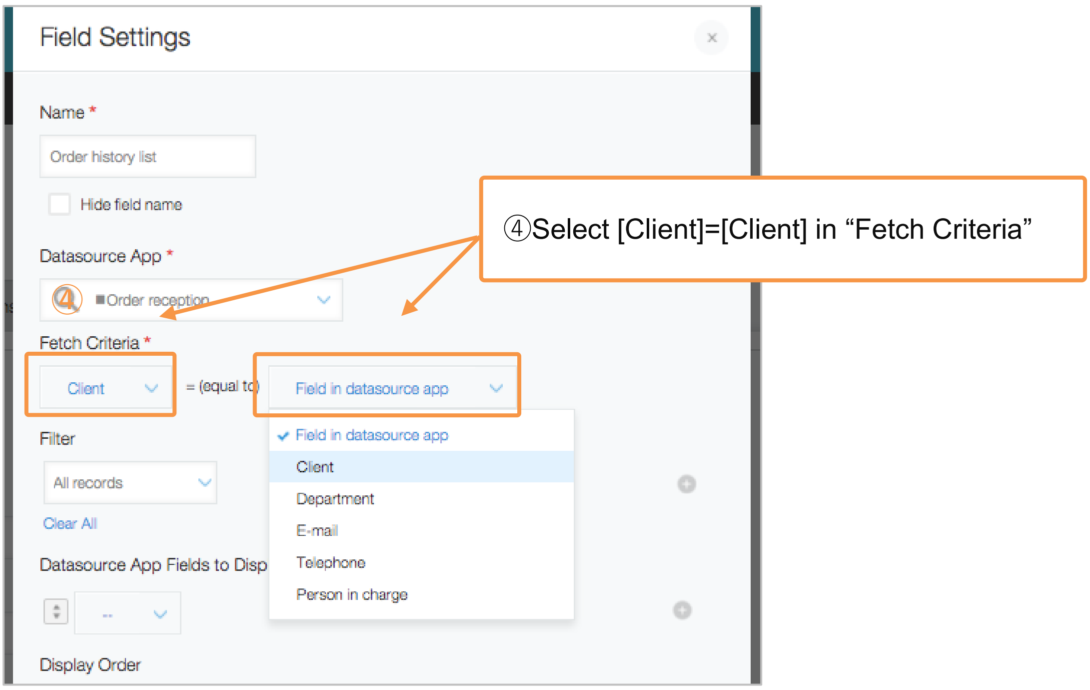


④ Select the conditions for “Fetch Criteria”

Select one field each from this app and the datasource app. Records that match the selected field values will be shown as a list. Here, we will select **[Client]** (This app)＝**[Client]** (datasource app).

※ Fields that can be designated as “Fetch Criteria”: "Text (single-line)” “Number” “Calculated” “Link” “Record number”

※Fields set as tables cannot be designated.



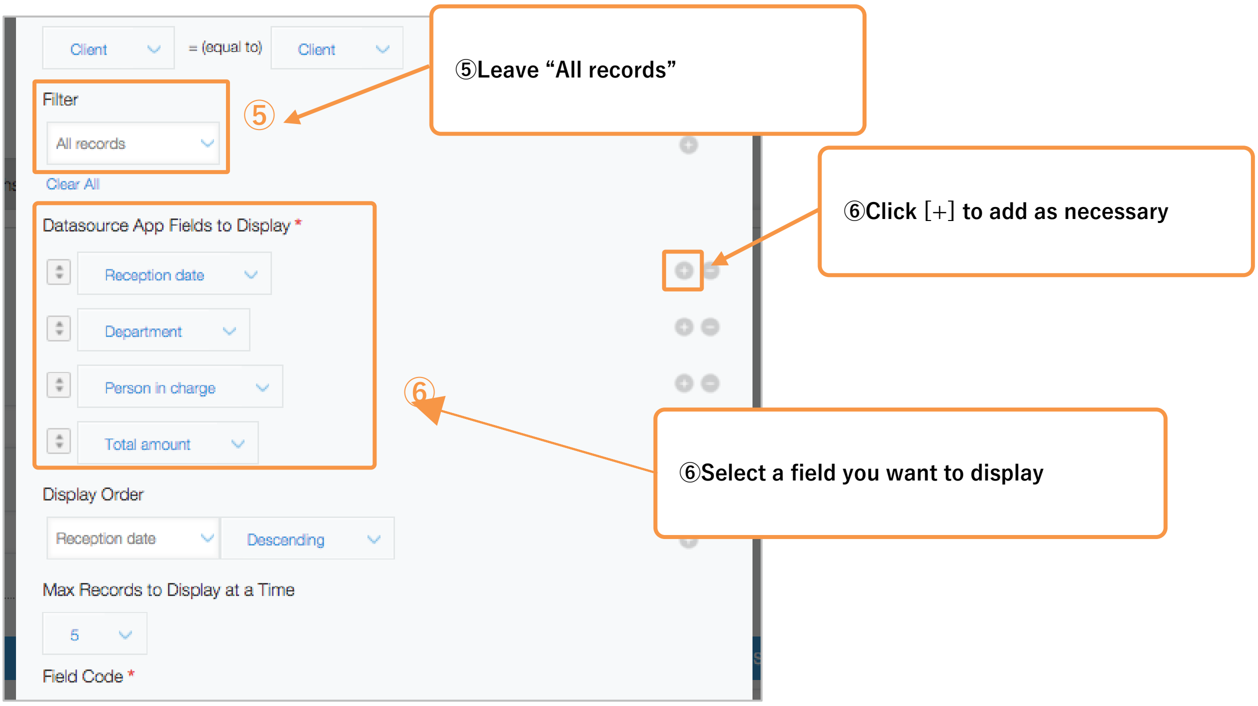
⑤Select Filter

You can select filter. Here, we will leave “**All records**”.

⑥ Select fields to be displayed

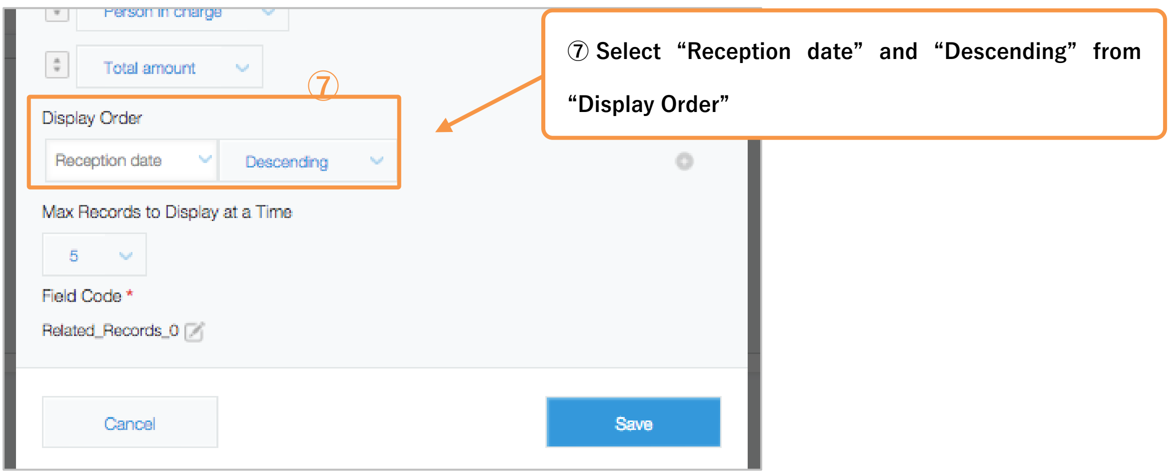
Select a field you need to display from the data source app. In this example, we will select **“Reception date,” “Department,” “Person in charge,” and “Total amount.”**

※Fields set as tables cannot be designated.



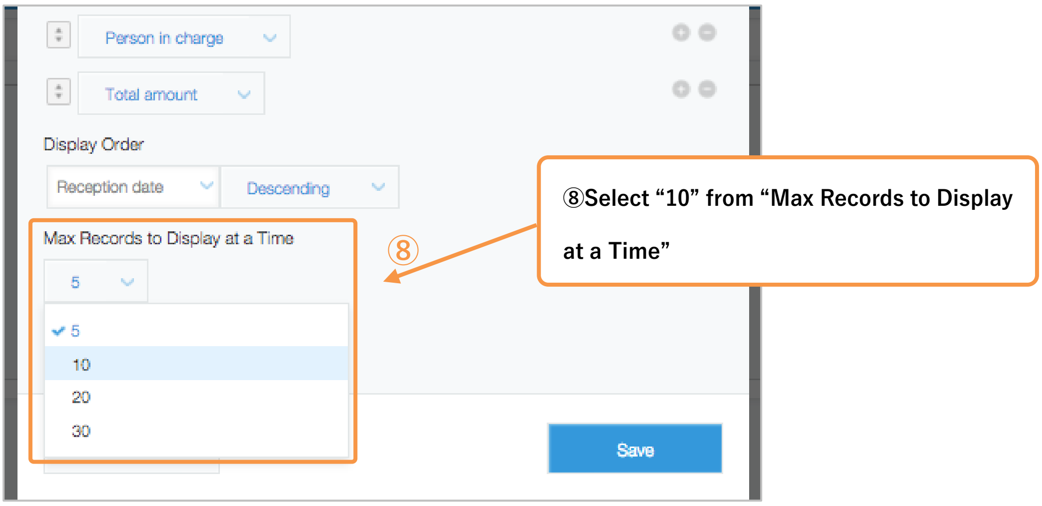
⑦ Select display order

Here, we will designate the order the “Related Records” field is sorted by. In this example, we will select **“Reception date” and “Descending.”**



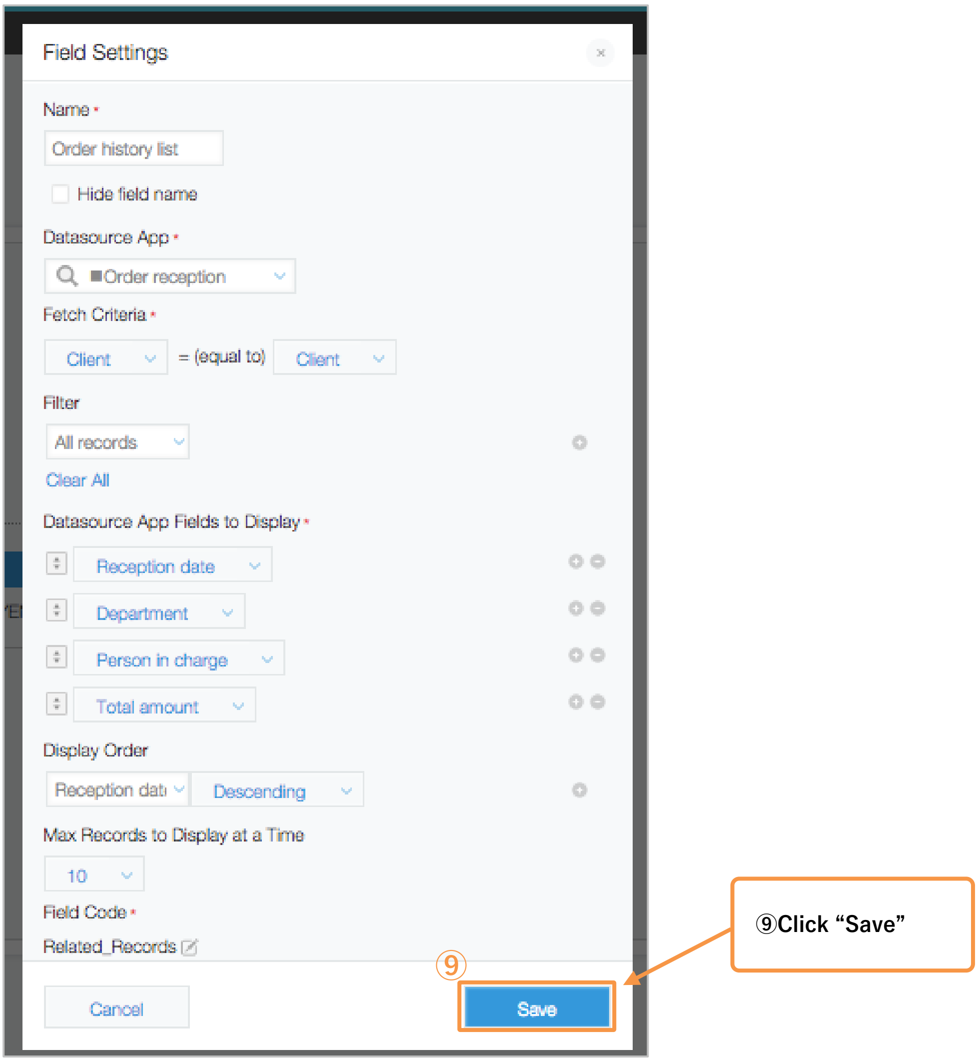
⑧ Select the max records to displayed at a time

Here, we will designate the number of records displayed that meet the conditions. In this example, we will select **“10.”**

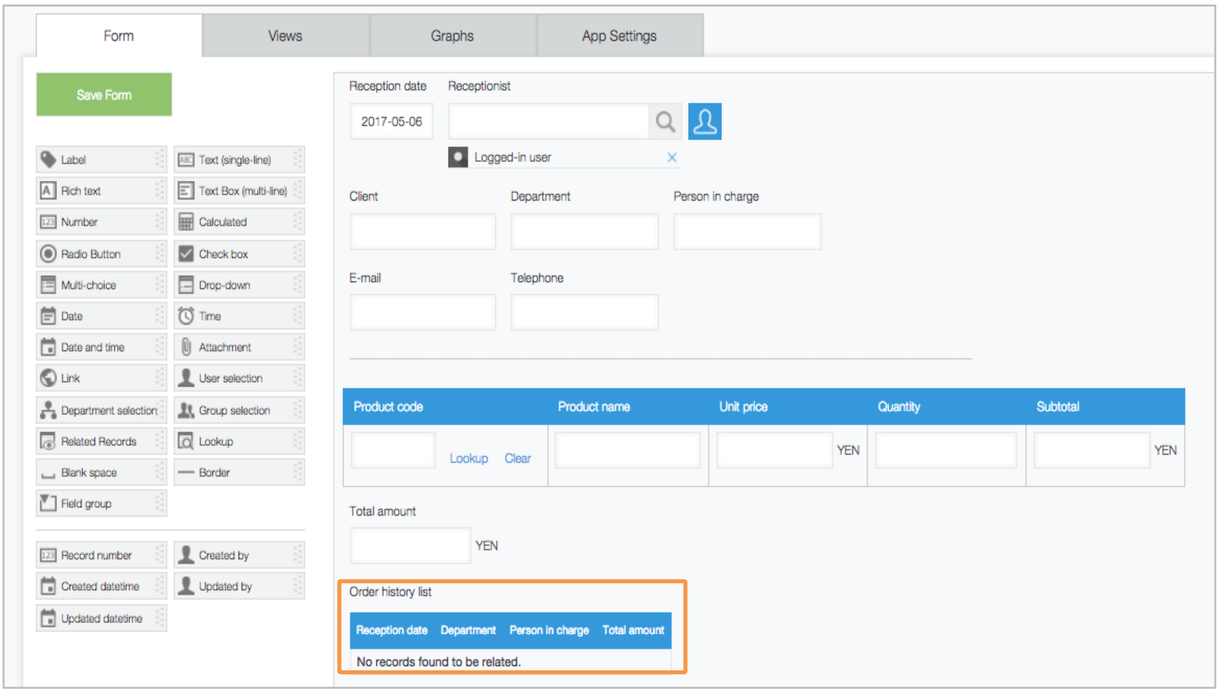


⑨Save

Confirm the setting contents and click “Save”.



The “Related Records” field is complete!



• Notes on Related Records

Although it is a convenient Related Records, there are points to be aware to use it correctly.

※Related records field values cannot be the target of the following actions:

・Aggregation ・Automatic calculation ・Search

※Related records field cannot be displayed as a list in records.

※Related records field values cannot be exported as a csv file.

※Only the following fields can be specified in "Fetch Criteria ".

"Text (single-line)" "Number " "Calculated" "Link" "Record number"

※The fields set in the table can not be specified as the criteria of the Related Records.

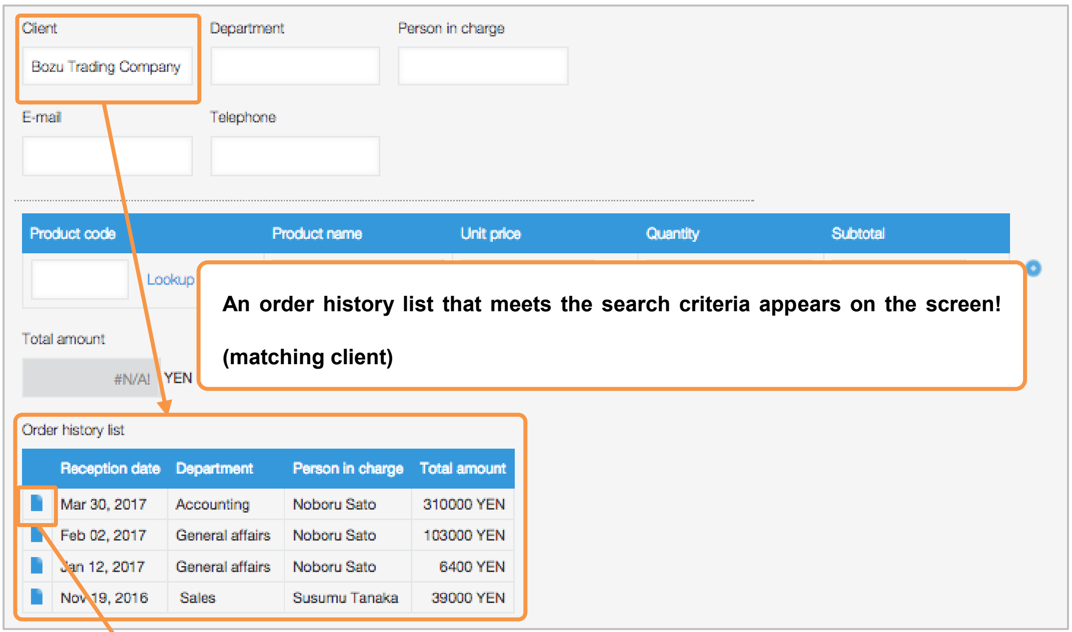
※The width of the related records field cannot be changed.

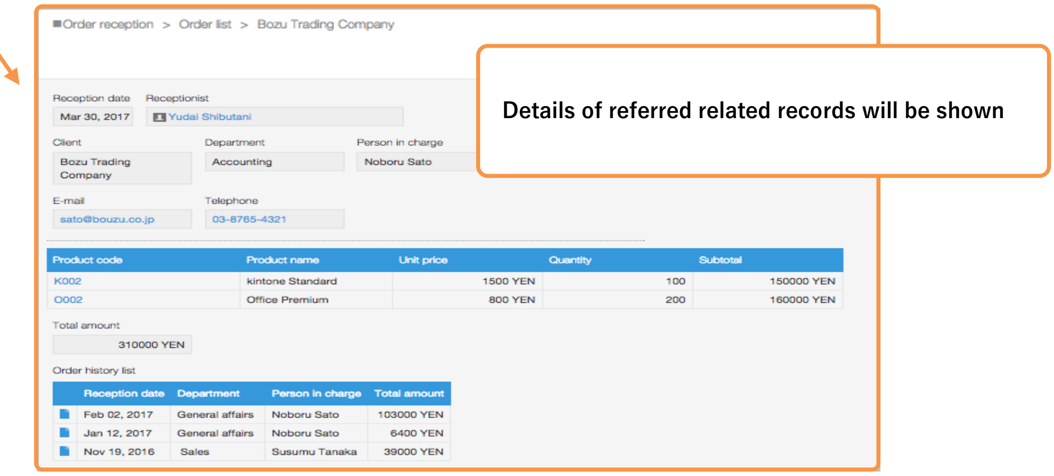
(Width will automatically be adjusted to match the number of characters.)

Let’s Try using the related records!

Let’s check to see if past order history will be displayed in the related records when multiple orders from the same client are registered.

【Record creation screen】

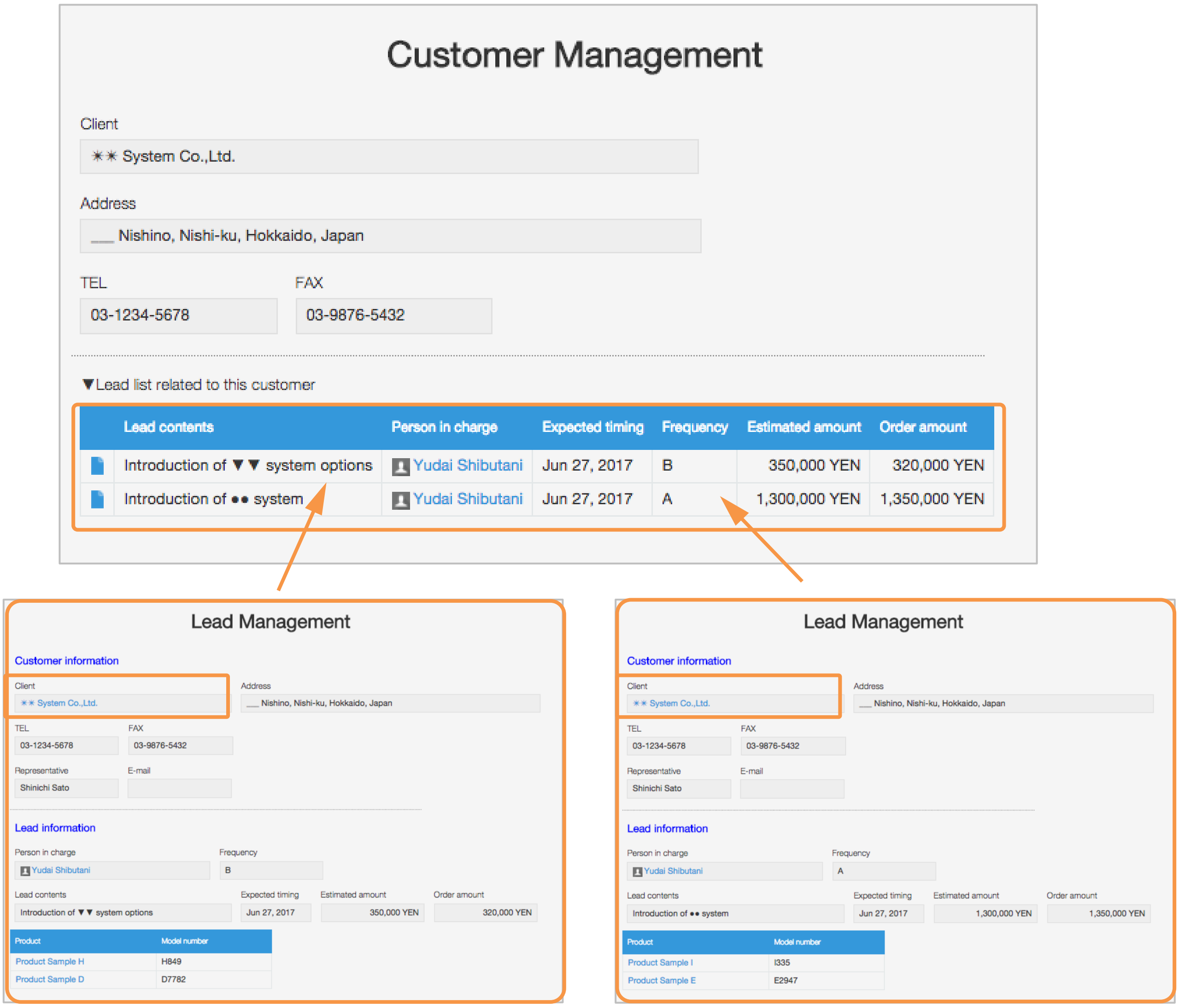




Example uses of related records

- **Customer Management ← Lead Management**

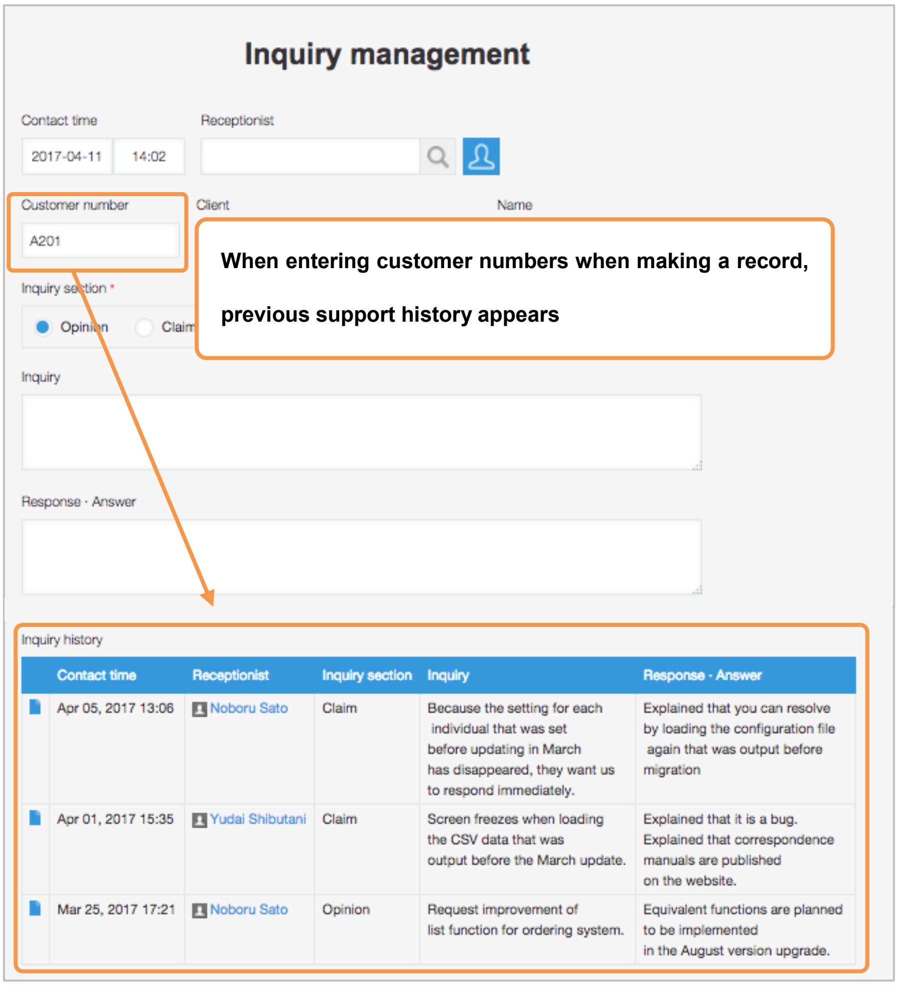
By correlating "Customer Management App" and "Lead Management App" with "Related Records", you can check the past lead history for one customer in one record of "Customer Management App" at once.



Lead Management App

Inquiry management

An “inquiry management App,” where a past support history appears when entering customer numbers



	Contact time	Receptionist	Inquiry section	Inquiry	Response · Answer
	Apr 05, 2017 13:06	Noboru Sato	Claim	Because the setting for each individual that was set before updating in March has disappeared, they want us to respond immediately.	Explained that you can resolve by loading the configuration file again that was output before migration
	Apr 01, 2017 15:35	Yudai Shibutani	Claim	Screen freezes when loading the CSV data that was output before the March update.	Explained that it is a bug. Explained that correspondence manuals are published on the website.
	Mar 25, 2017 17:21	Noboru Sato	Opinion	Request improvement of list function for ordering system.	Equivalent functions are planned to be implemented in the August version upgrade.

When using the related records, you can see all related information on one screen, making it extremely convenient!
If you click the icon on the left of the list, you can directly access the referred records.