



Let's use it conveniently

basic guidebook

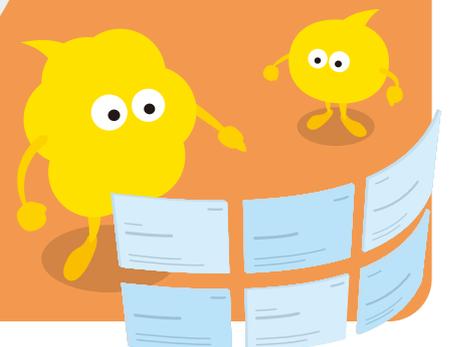
vol. 05

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



Before implementing the related records



Order Management App

- Related records needed to be searched for individually
- 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



■Order Management > Order list > Cybozu Co. Ltd.

Purchase history had to be searched for and checked individually

Reception date: Jan 12, 2017
Receptionist: Yudai Sh

Client: Cybozu Co. Ltd.
E-mail: sato@cybozu.co.jp
Telephone: 03-1234-5678

Product code	Product name
K001	kintone Light
O001	Office Standard

Reception date: Feb 02, 2017
Receptionist: Yudai Sh

Client: Cybozu Co. Ltd.
E-mail: sato@cybozu.co.jp
Telephone: 03-1234-5678

Reception date: Mar 29, 2017
Receptionist: Yudai Shibutani

Client: Cybozu Co. Ltd.
E-mail: sato@cybozu.co.jp
Telephone: 03-1234-5678

Product code	Product name
K001	kintone Light
O001	Office Standard

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



■Order Management > Order list > Bozu Trading Company

Reception date: Mar 30, 2017
Receptionist: Yudai Shibutani

Client: Bozu Trading Company
Department: Accounting
Person in charge: Noboru Sato

E-mail: sato@bouzu.co.jp
Telephone: 03-8765-4321

Product code	Product name	Unit price	Quantity	Subtotal
K002	kintone Standard	1500 YEN	100	150000 YEN
O002				

Total amount: 310000 YEN

**An order history list that meets the search criteria appears on the screen!
(matching client name)**

Order history list

Reception date	Department	Person in charge	Total amount
Feb 02, 2017	General affairs	Noboru Sato	103000 YEN
Jan 12, 2017	General affairs	Noboru Sato	6400 YEN
Nov 19, 2016	Sales	Susumu Tanaka	39000 YEN

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]

Reception date	Department	Person in charge	Total amount
Mar 30, 2017	Accounting	Noboru Sato	310000 YEN
Feb 02, 2017	General affairs	Noboru Sato	103000 YEN
Jan 12, 2017	General affairs	Noboru Sato	6400 YEN
Nov 19, 2016	Sales	Susumu Tanaka	39000 YEN

1. Place the “Related Records” field

① Place the “Related Records” field

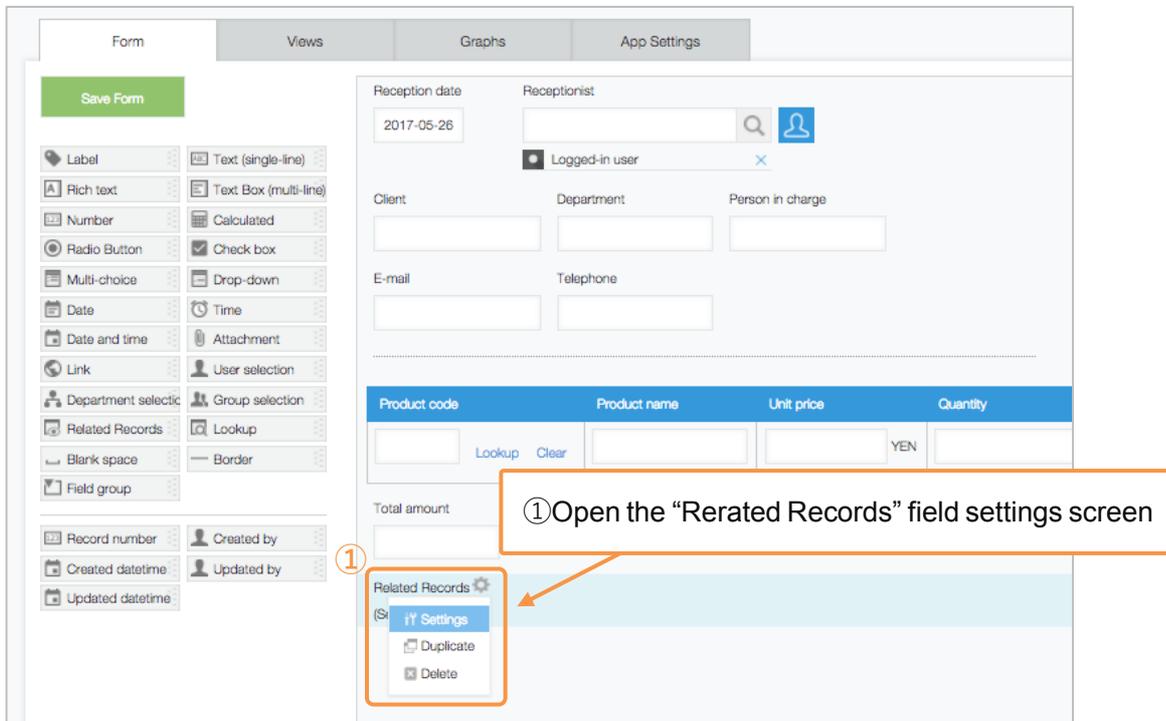
Place [Related Records] from the parts list on the left side of the screen.

① Place the “Related Records” field

2. Set up the “Related Records” field

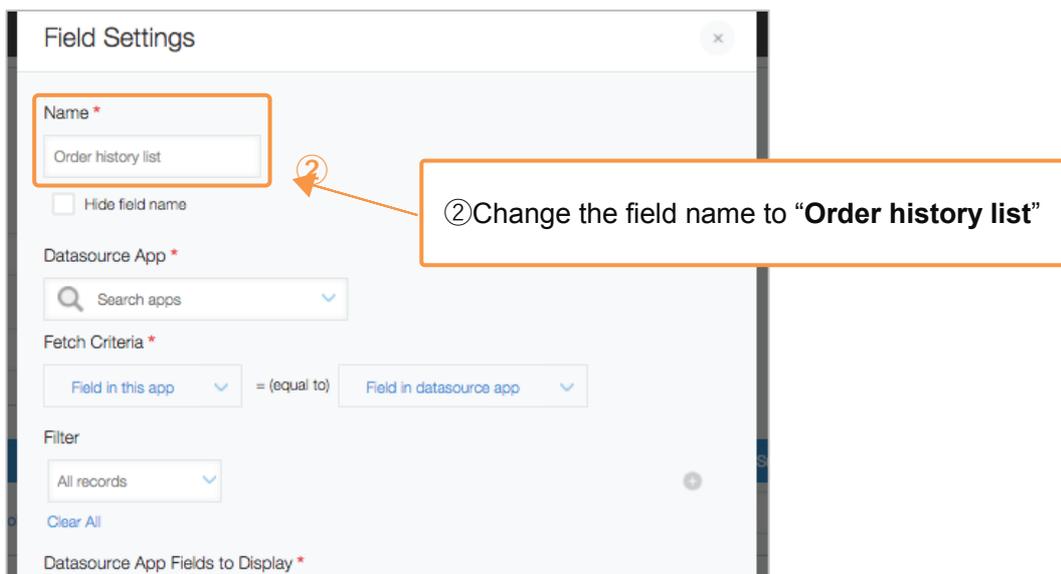
① Open the “Related Records” field settings screen

Displays the “Related Records” field settings screen



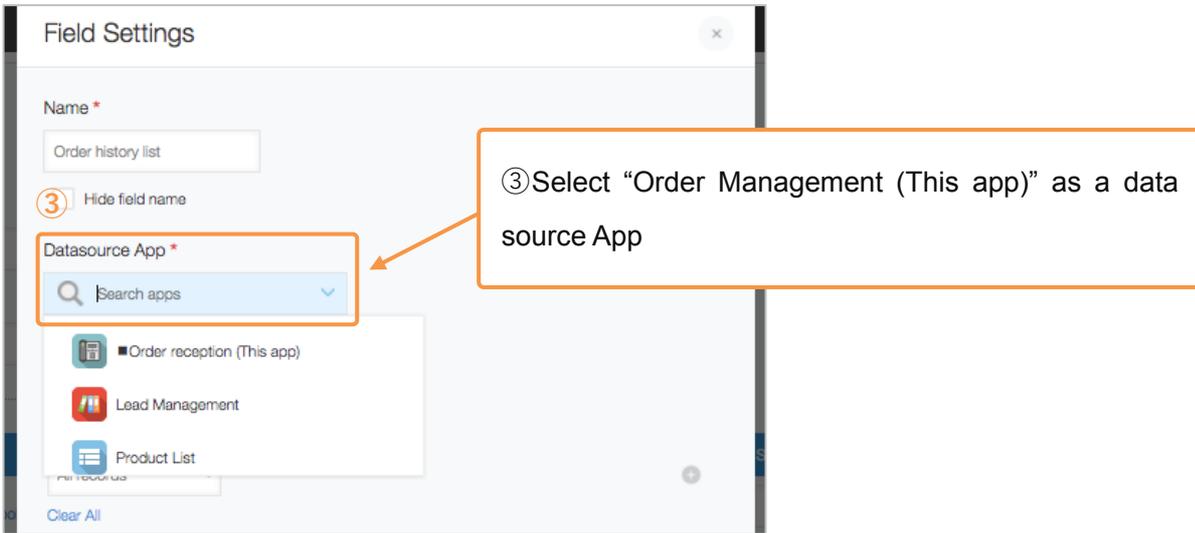
② Change the field name

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]**.

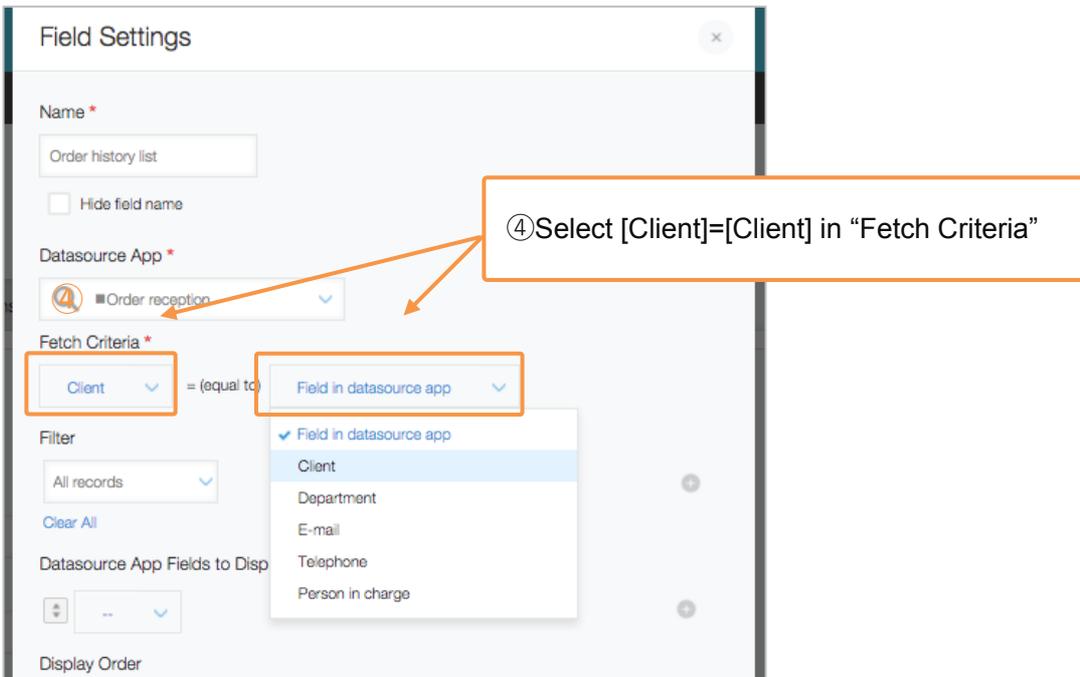


④ Select the conditions for "Fetch Criteria"

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.



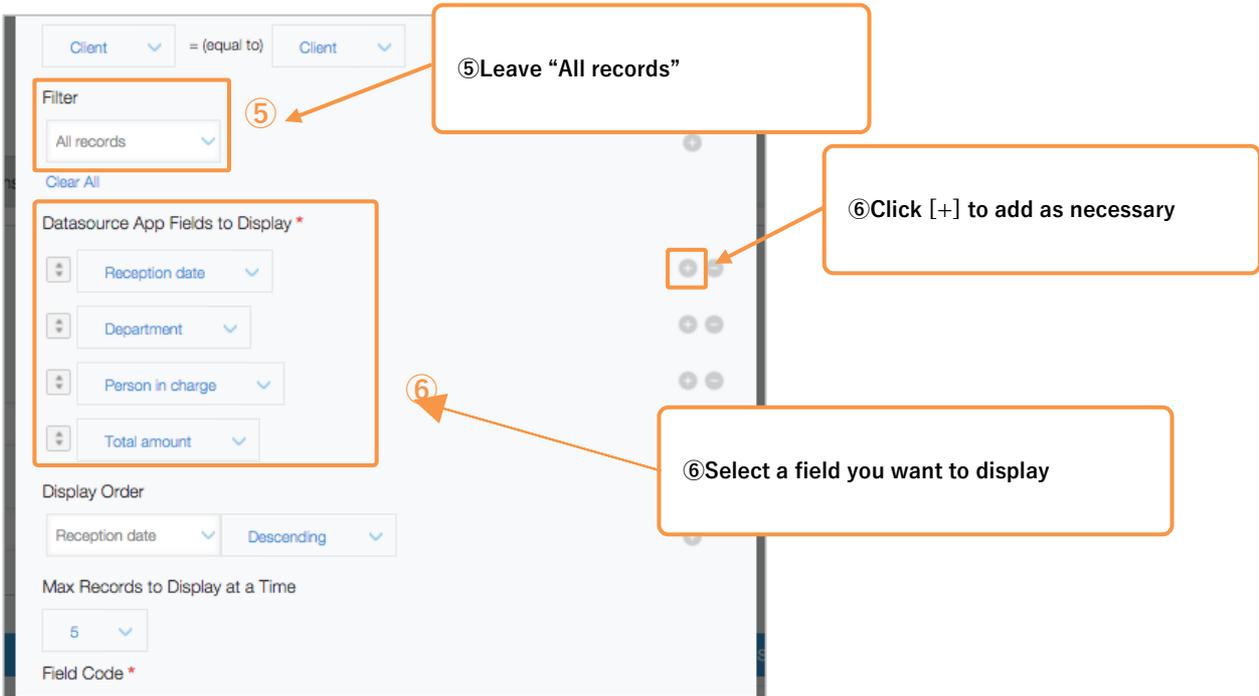
⑤ Select Filter

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

⑥ Select fields to be displayed

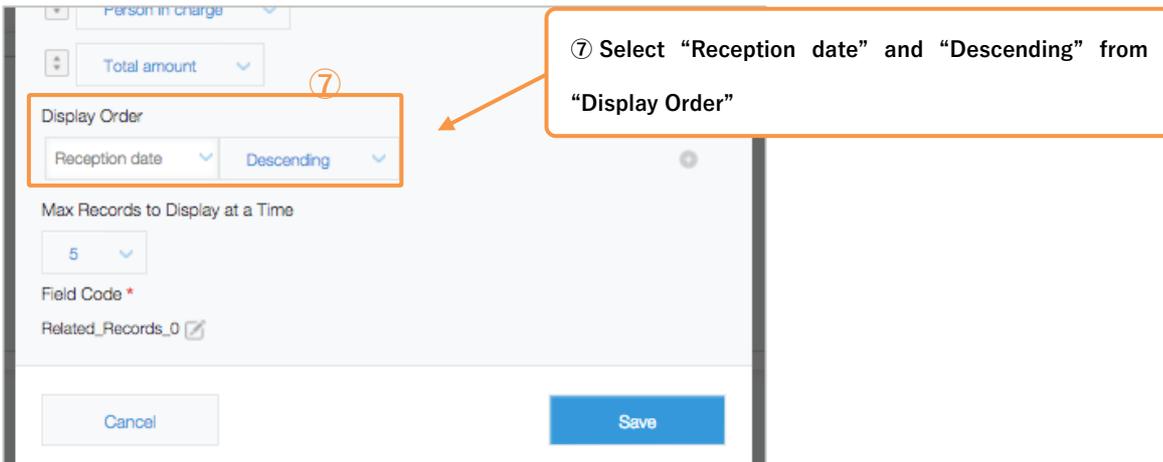
Select a field you need to display from the data source app. In this example, we will select “Reception date,” “Department,” “Person in charge,” and “Total amount.”

※Fields set as tables cannot be designated.



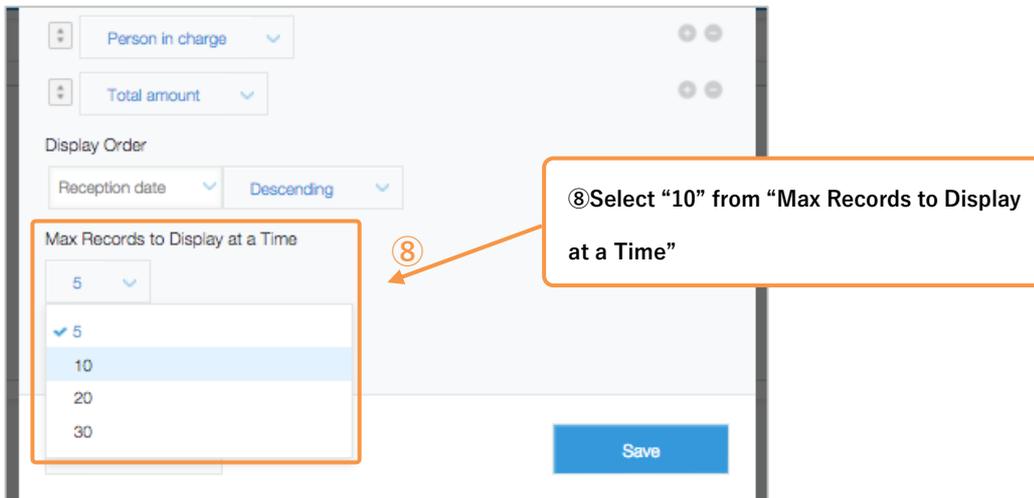
⑦ Select display order

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



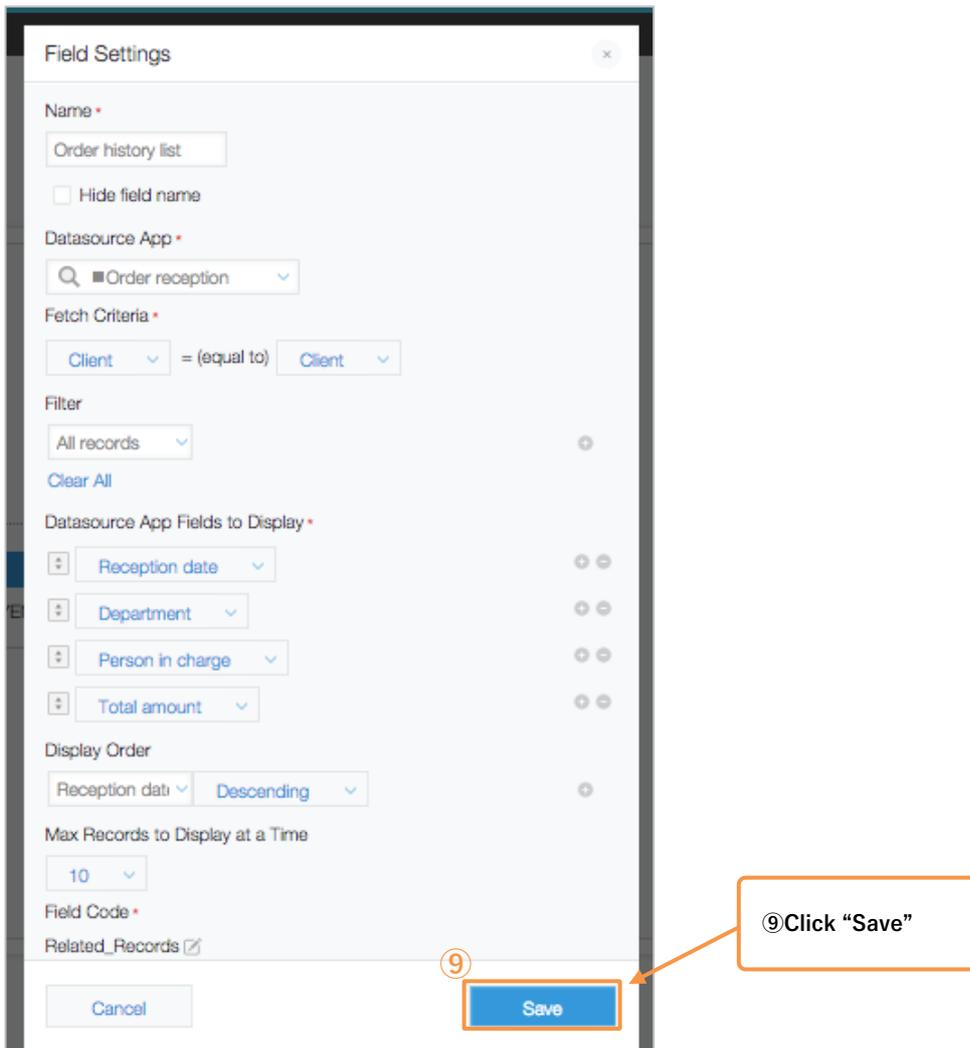
⑧ Select the max records to displayed at a time

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!

Form | Views | Graphs | App Settings

Save Form

Reception date: 2017-05-06 | Receptionist: [User Selection]

Client: [Text] | Department: [Text] | Person in charge: [Text]

E-mail: [Text] | Telephone: [Text]

Product code	Product name	Unit price	Quantity	Subtotal
[Text]	[Text]	[Text]	[Text] YEN	[Text] YEN

Total amount: [Text] YEN

Order history list

Reception date	Department	Person in charge	Total amount
No records found to be related.			

• 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】

Product code	Product name	Unit price	Quantity	Subtotal

Total amount: #N/A YEN

Reception date	Department	Person in charge	Total amount
Mar 30, 2017	Accounting	Noboru Sato	310000 YEN
Feb 02, 2017	General affairs	Noboru Sato	103000 YEN
Jan 12, 2017	General affairs	Noboru Sato	6400 YEN
Nov 19, 2016	Sales	Susumu Tanaka	39000 YEN

Order reception > Order list > Bozu Trading Company

Reception date: Mar 30, 2017
Receptionist: Yudai Shibutani

Client: Bozu Trading Company
Department: Accounting
Person in charge: Noboru Sato

E-mail: sato@bouzu.co.jp
Telephone: 03-8785-4321

Product code	Product name	Unit price	Quantity	Subtotal
K002	kintone Standard	1500 YEN	100	150000 YEN
O002	Office Premium	800 YEN	200	160000 YEN

Total amount: 310000 YEN

Reception date	Department	Person in charge	Total amount
Feb 02, 2017	General affairs	Noboru Sato	103000 YEN
Jan 12, 2017	General affairs	Noboru Sato	6400 YEN
Nov 19, 2016	Sales	Susumu Tanaka	39000 YEN

Details of referred related records will be shown

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.

Customer Management

Client

Address

TEL FAX

▼ Lead list related to this customer

Lead contents	Person in charge	Expected timing	Frequency	Estimated amount	Order amount
Introduction of ▼▼ system options	Yudai Shibutani	Jun 27, 2017	B	350,000 YEN	320,000 YEN
Introduction of ●● system	Yudai Shibutani	Jun 27, 2017	A	1,300,000 YEN	1,350,000 YEN

Lead Management

Customer information

Client

Address

TEL FAX

Representative E-mail

Lead information

Person in charge Frequency

Lead contents Expected timing Estimated amount Order amount

Product	Model number
Product Sample H	H849
Product Sample D	D7782

Lead Management

Customer information

Client

Address

TEL FAX

Representative E-mail

Lead information

Person in charge Frequency

Lead contents Expected timing Estimated amount Order amount

Product	Model number
Product Sample I	I335
Product Sample E	E2947



Lead Management App

- **Inquiry management**

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

Inquiry management

Contact time: 2017-04-11 14:02
Receptionist: [Search] [User Icon]

Customer number: A201
Client: [] Name: []

Inquiry section *
 Opinion Claim

Inquiry: [Text Area]
Response · Answer: [Text Area]

Inquiry history

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.

