

# JOYZO

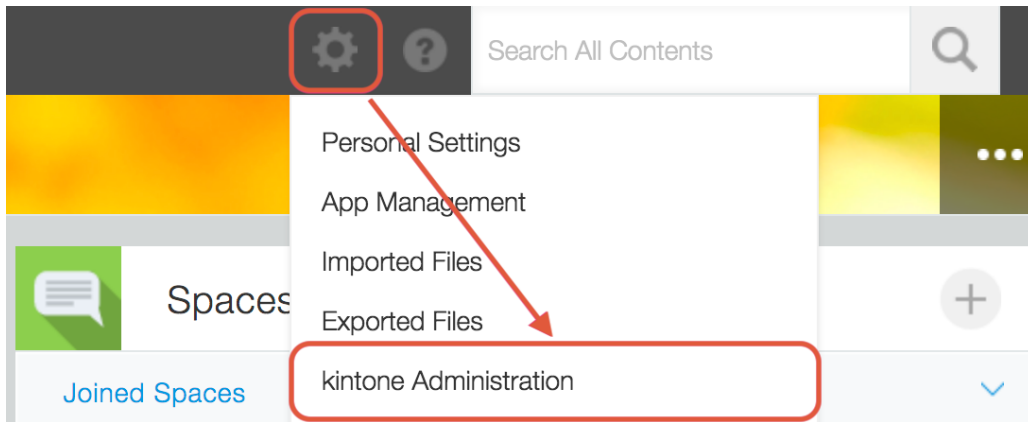
## Budget Tracker Plug-in Setup Guide



kintone

# SETUP GUIDE

1. Click the gear icon in the top right corner of the screen. Click "kintone Administration".

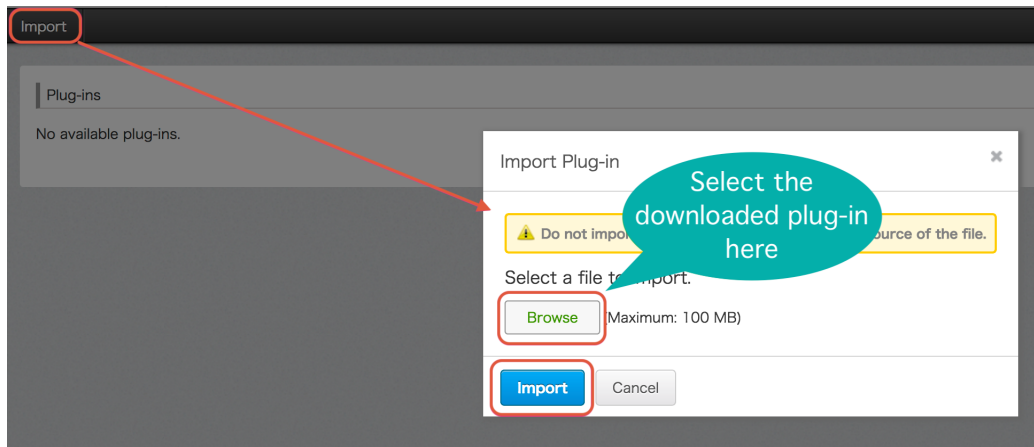


2. From the "kintone Administration" page, choose "Plug-ins" from the "Other" category.

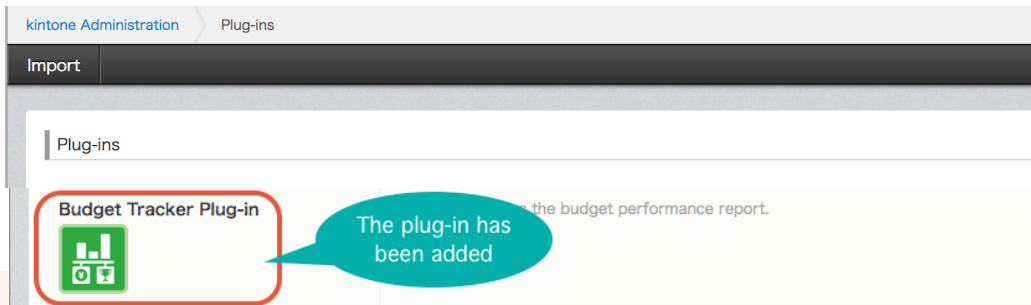
## kintone Administration

- **Apps**
  - [App Management](#)
  - [App Templates](#)
- **Spaces**
  - [Space Management](#)
  - [Space Templates](#)
  - [Action Management](#)
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  - [JavaScript and CSS Customization](#)
  - [Header Color](#)
- **Other**
  - [Feature Activation](#)
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  - [Default View for Mobile Browsers](#)

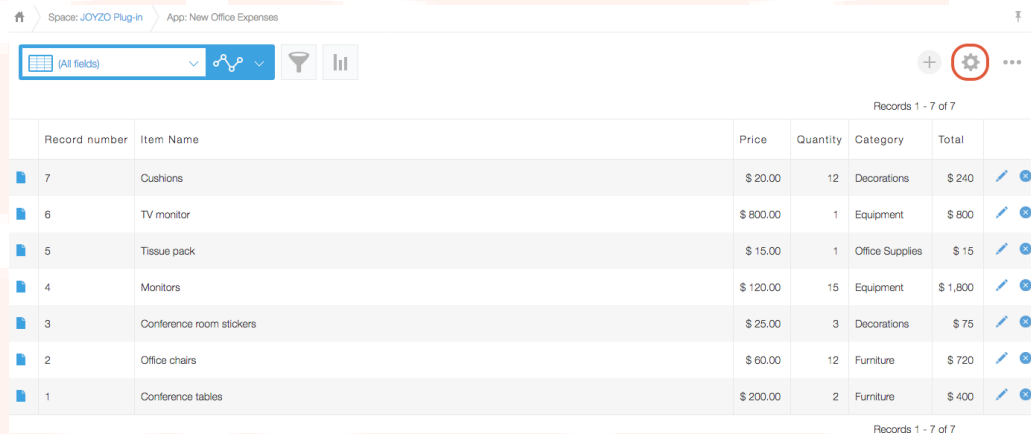
3. From the "Plug-ins" screen, click "Import", and then load the plug-in file.



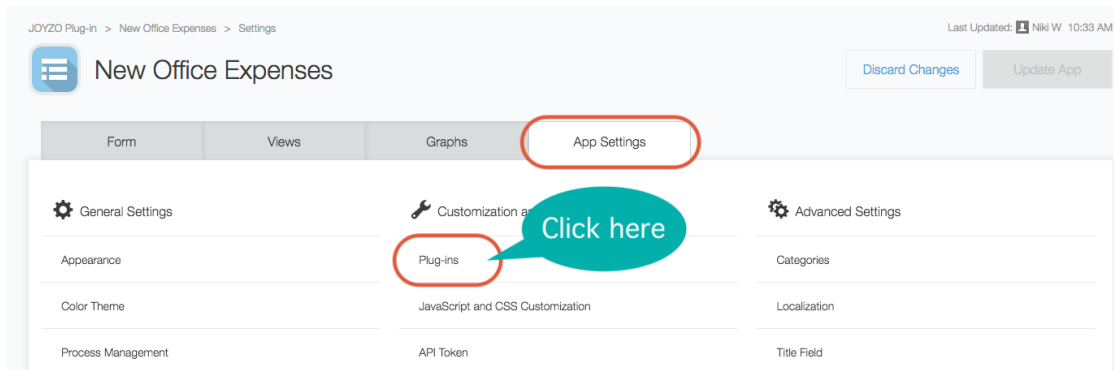
4. The Budget Tracker Plug-in will be added to the imported plug-ins list.



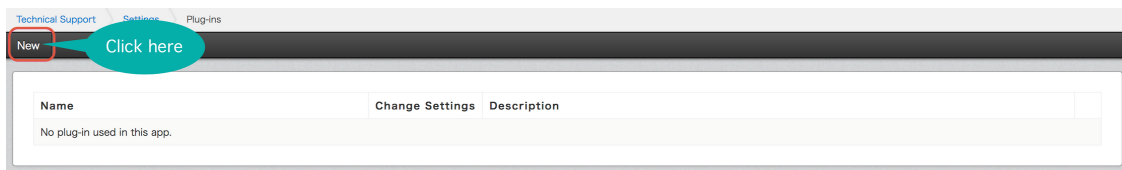
5. Go to the application that you'd like to add the plug-in to and click on the gear icon to go to the application settings.



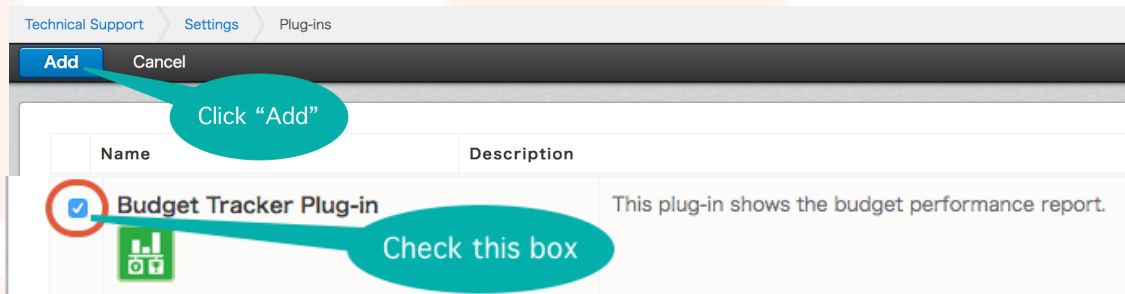
6. Click on the "App Settings" tab and then click on "Plug-ins" under "Customization and Integration".



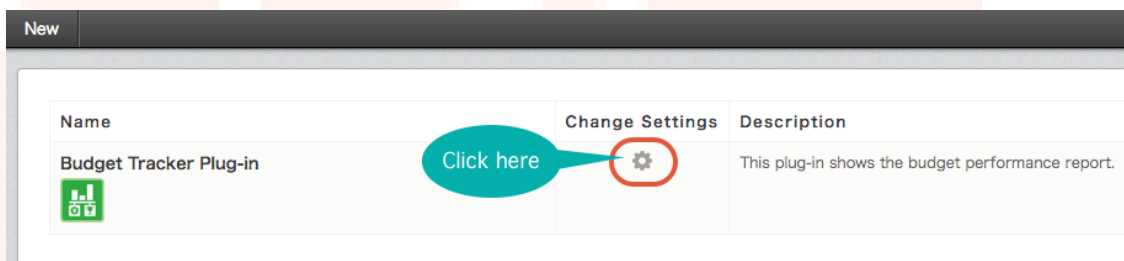
7. Click "New" in the top left corner.



8. Find the Budget Tracker Plug-in from the list and check the checkbox. Click "Add" to save.



9. Under the "Change Settings" column, click the gear icon.



10. Enter in the license key, and set a name for the totals graph to be displayed. The created view will automatically have this name.

Category: Plug-in

**Budget Tracker**

Details

Version: 1

### Settings

Plug-in activation\*

Available  Not Available

License key\*

.....

View name\*

Budget Performance

Choose to enable or disable the plug-in

Enter in the license key

Enter in a name for the comparison view

11. Set up the connection to the application that contains target/goal data.

### Target data app

App ID\*

718

Enter in the app ID of the budget data

Grouping

Group by (Level 1)\*

Category

Select which fields to use for the first level of grouping, and the second level of grouping on the charts (you can just use a main group if you like)

Group by (Level 2)

-

Asc  Desc

View name for filtering

-

If you have a filtered view you'd like to use, select it here

Target field\*

Allotted Budget

Select the field that holds the data you'd like to compare

12. Set up the connection to the application that contains actual result data.

### Actual data app

Grouping

Group by (Level 1)\*

Category

Select which fields to use for the first level of grouping, and the second level of grouping on the charts (you can just use a main group if you like)

Group by (Level 2)

-

Select which totaling method to use

Totaling\*

Record count  Sum of the selected field

Selected field\*

Total

Select the field that the above totaling method will be applied to

13. Finally, set up the display settings and save the plug-in.

### Display options

Chart type\*

- Bar
- Stacked bar
- Table

Select the type of charts you'd like to display

Show percentage

On

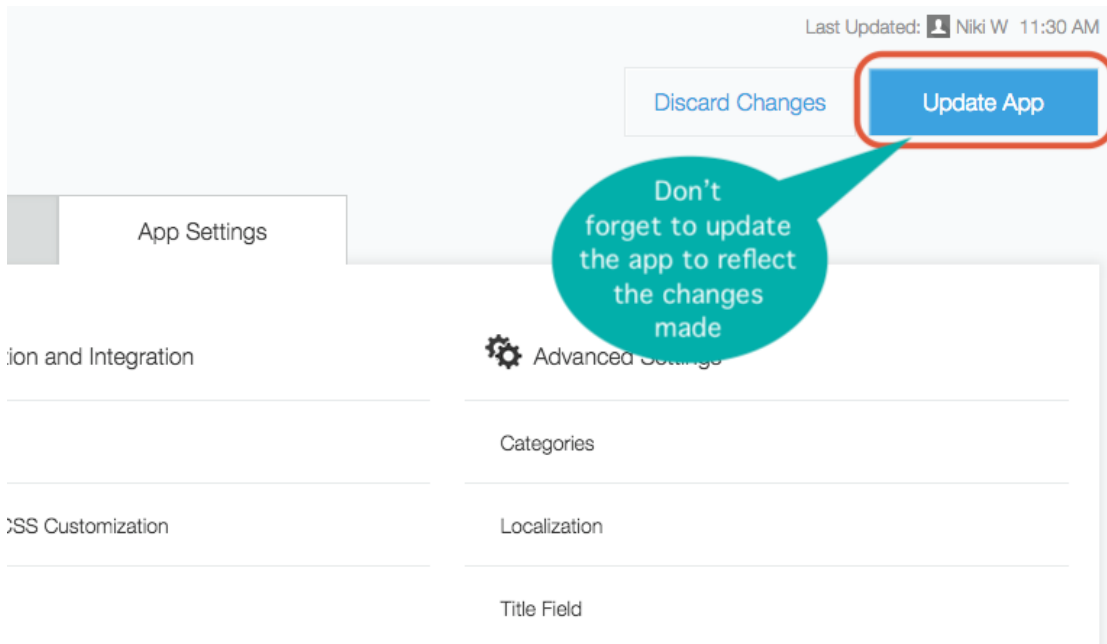
Select whether to show percentages or not

Save the settings

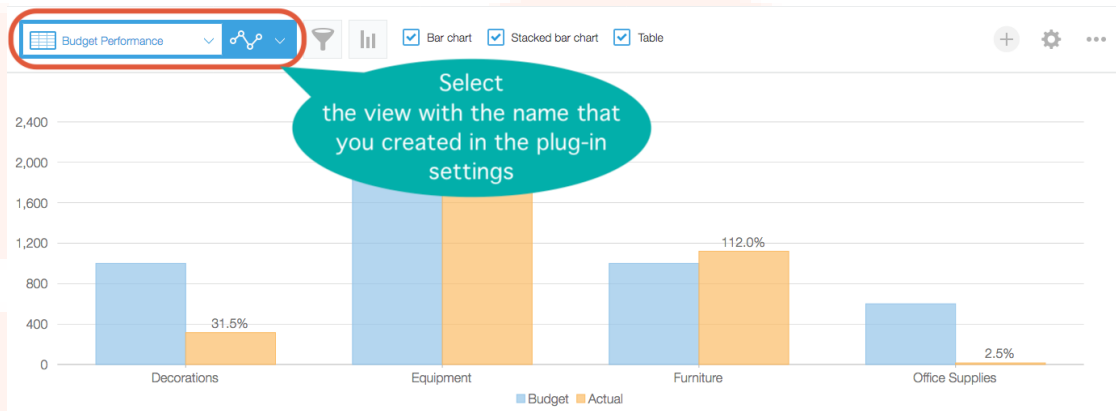
Save

Cancel

14. Once setup of the plug-in has been completed, don't forget to update the app.

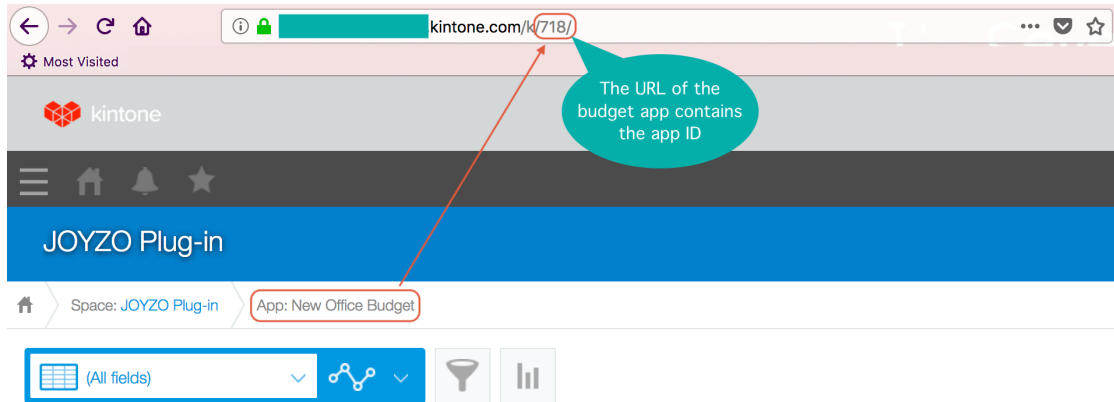


15. Select the view that you created earlier and the results are shown.



# SETUP NOTES

- When setting up the estimate data app, make sure to use the app number as following.



- Do not delete the view that was created to show the aggregation.
- In both the estimate data and actual data apps, use the same name for items that you want to display.
  - (Example) Estimate Data app item names : itemA, itemB, itemC...
  - (Wrong) Actual Data app: A item, B item, C item...
  - (Correct) Actual Data app: itemA, itemB, itemC