



Let's use it conveniently



basic guidebook

vol. 02

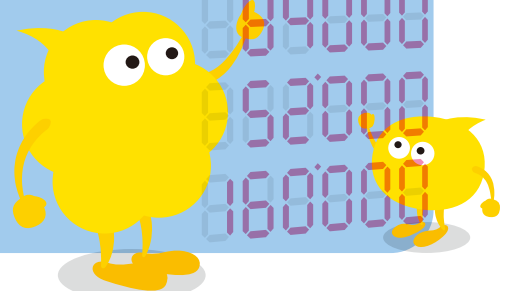
Calculations

Here, we will use the "Order reception application" as an example to explain calculation fields, which can automatically calculate numerical values, and display the results!

Solve
common
problems!

It's a lot of work having to calculate and enter all the numbers by myself.

I wonder if kintone can automatically calculate subtotals or total amounts automatically...?



Before implementing calculation fields



Order Management App

- Numerical values were calculated manually
 - Calculations took time
 - There was a risk of calculation errors



Yudai Shibutani

Client: Department: E-mail: Telephone:

Subtotals and total amounts were entered one by one

Product code	Product name	Unit price	Quantity	Subtotal
0001	kintone Light	780 YEN	100	78000 YEN
0002	kintone Standard	1500 YEN	500	750000 YEN
0003	Office Standard	500 YEN	30	<input type="text"/> YEN
0004	Office Premium	800 YEN	40	<input type="text"/> YEN

Total amount: YEN

After implementing calculation fields



Order Management App

- Create **calculation fields** for fields that require calculations
- Pre-set calculation formulas automatically calculate!
- Prevent calculation errors!



CancelSave

Client

Department

Person in charge

E-mail

Telephone

Subtotals and total amounts are calculated automatically!

Product code	Product name	Unit price	Quantity	Subtotal
0001	kintone Light	780 YEN	100	78000 YEN
0002	kintone Standard	1500 YEN	500	750000 YEN
0003	Office Standard	500 YEN	30	15000 YEN
0004	Office Premium	800 YEN	40	32000 YEN

Total amount
875000 YEN

How to set calculation fields

In kintone, by setting various calculation formulas beforehand, you can use the **calculation field**, a function which will automatically display calculation results.

By using this, you can reduce the labor spent on calculating, and increase input efficiency.

【Completed image】

The screenshot shows a kintone form titled 'Reception Date' and 'Receptionist'. It includes fields for 'Client', 'Department', 'Person in charge', 'E-mail', and 'Telephone'. Below these is a table with columns 'Product code', 'Product name', 'Unit price', 'Quantity', and 'Subtotal'. A formula box above the table displays 'Unit Price × Quantity = Subtotal'. The 'Unit price' and 'Quantity' fields in the table are highlighted with orange boxes, indicating they are calculation fields.

1. Place the number field

Place “Number” field for “Unit price” and “Calculation” field to show calculation results.

① Place “Number” field

Place two “Number” fields from the parts list on the left side of the screen.

The screenshot shows the kintone form editor interface. On the left is a 'Form' tab with a 'Save Form' button and a list of field types. The 'Number' field type is highlighted with an orange box. An orange arrow points from this box to the 'Number' field in the 'Unit price' column of the table in the main form view. Another orange box highlights the 'Number' field in the 'Quantity' column, with a circled '1' above it. A third orange box highlights the 'Number' field in the 'Subtotal' column, also with a circled '1' above it. A text box 'Place the “Number” field' is positioned above the 'Quantity' and 'Subtotal' fields.

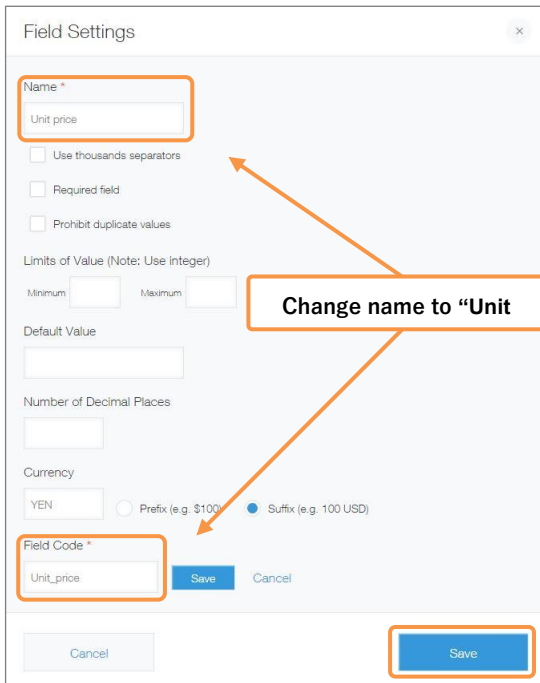
② Set field name and field code

Open “Number” field setting screen and set field name and field code.

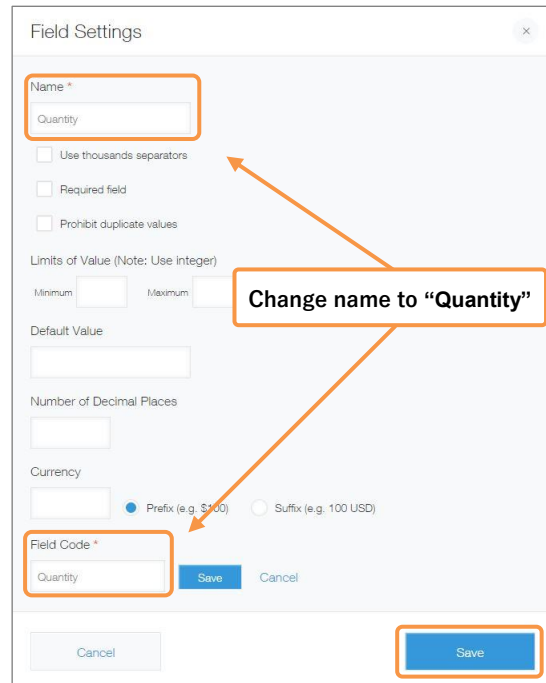
Change one of the “Number” field name to “**Unit price**” and the other to “**Quantity**”.

Also change field code for the same name as field name, “**Unit_price**” and “**Quantity**” and Click [Save].

Field codes are character strings to identify fields. They will be used for calculations.



The screenshot shows the 'Field Settings' dialog box. The 'Name *' field is set to 'Unit price'. The 'Field Code *' field is set to 'Unit_price'. An orange box highlights the 'Name *' field with the text 'Change name to “Unit”'. Another orange box highlights the 'Field Code *' field with the text 'Change name to “Unit”'. The 'Save' button is highlighted with an orange box.



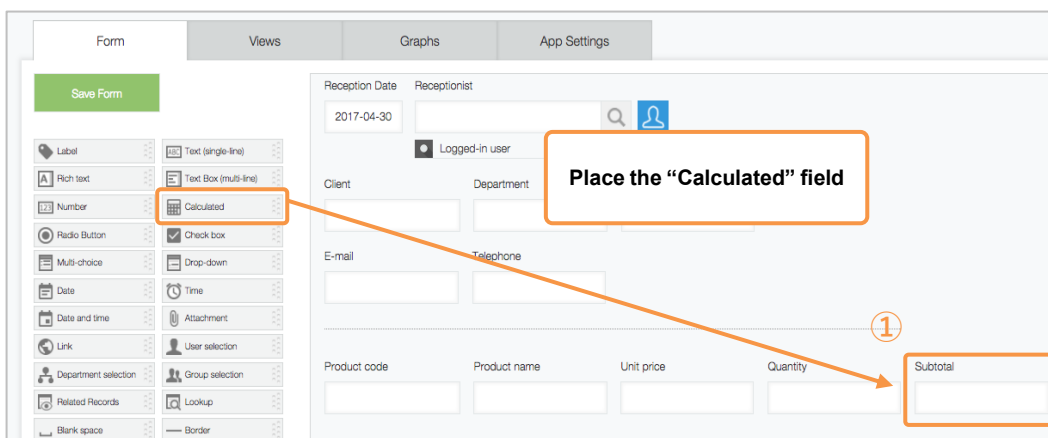
The screenshot shows the 'Field Settings' dialog box. The 'Name *' field is set to 'Quantity'. The 'Field Code *' field is set to 'Quantity'. An orange box highlights the 'Name *' field with the text 'Change name to “Quantity”'. Another orange box highlights the 'Field Code *' field with the text 'Change name to “Quantity”'. The 'Save' button is highlighted with an orange box.

We use the “field codes” of fields we want to calculate with the calculation formulas.



2. Place the calculation field

① Place the “**Calculated**” field from the parts list on the left side of the screen.



The screenshot shows the 'Form' editor screen. On the left, there is a 'Parts list' with various field types. The 'Calculated' field is highlighted with an orange box. An orange arrow points from this box to the 'Subtotal' field in the form layout, which is also highlighted with an orange box. A circled number '1' is next to the 'Subtotal' field. The form layout includes fields for Reception Date, Receptionist, Client, Department, E-mail, Telephone, Product code, Product name, Unit price, Quantity, and Subtotal.

3. Set the calculation formulas

① Open the subtotal field's settings screen

Field Settings

Name *

Subtotal

Formula ? *

Change name to

② Set the calculation formulas

Here, we will set the calculation formula, which will automatically calculate the subtotal. In this example, we want to multiply “Unit price” by “Quantity,” so we will enter “**Unit_price*Quantity**”.

*Calculation formulas use the field codes of fields you wish to calculate.

※For the four arithmetic operations, use + - * /(half-size characters).

※ In the calculation field, in addition to “Number” you can also calculate **Date/Time, Day, Time, and Duration**.

Field Settings

Name *

Subtotal

☐ Hide field name

Formula ? *

Unit_price*Quantity

☐ Hide formula

☒ Number (1000)

Enter the formula “Unit_price*Quantity”

③ Change the field code

Change the field code to **Subtotal**, the same as the field name and click [Save] .

Currency

☒ Pre

Field Code *

Subtotal

Change the field code to “Subtotal”

Click “Save”

Cancel Save

Your calculations are complete!

Reception Date: 2017-04-30
Receptionist: [Search icon] [User icon]
Logged-in user: [X]
Client: [Field]
Department: [Field]
Person in charge: [Field]
E-mail: [Field]
Telephone: [Field]
Product code: [Field]
Product name: [Field]
Unit price: [Field]
Quantity: [Field]
Subtotal: [Field]

Let's try using calculations!

Enter the "Unit Price" and "Quantity", and see if the calculation results will appear in the "Subtotal"!

Reception Date: 2017-04-30
Receptionist: [Search icon] [User icon]
Logged-in user: [X]
Client: [Field]
Department: [Field]
Person in charge: [Field]
E-mail: [Field]
Telephone: [Field]
Product code: [Field]
Product name: [Field]
Unit price: [Field]
Quantity: [Field]
Subtotal: [Field]

Reception Date: [Field]
Receptionist: [Field]
Logged-in user: [X]
Client: [Field]
Department: [Field]
Person in charge: [Field]
E-mail: [Field]
Telephone: [Field]
Product code: 0001
Product name: kintone Light
Unit price: 780
Quantity: 100
Subtotal: 78000

Calculation method using tables

When combined with table functions, you can calculate the **total amount** in the **tables**.

【Completed image】

The screenshot shows a form with a table and a calculated field. The table has columns for Product code, Product name, Unit price, Quantity, and Subtotal. The Subtotal column is highlighted with an orange box. Below the table, a 'Total amount' field is highlighted with an orange box, showing the value 875000. An orange arrow points from the Subtotal column to the Total amount field.

Product code	Product name	Unit price	Quantity	Subtotal
0001	kintone Light	780	100	78000
0002	kintone Standard	1500	500	750000
0003	Office Standard	500	30	15000
0004	Office Premium	800	40	32000

Total amount: 875000

1. Place the calculation field

① Place the calculation field

Place “**Calculated**” from the parts list on the left side of the screen, and change the field name to **Total Amount**.

The screenshot shows the form editor interface. On the left, a 'Parts list' contains various field types, with 'Calculated' highlighted and circled in orange. An orange arrow points from this field to a 'Calculated' field being added to the table. A text box with the instruction 'Place the “Calculated” field' is also present. The table has columns for Product code, Product name, Unit price, Quantity, and Subtotal. The 'Calculated' field is being added to the Subtotal column.

Place the “Calculated” field

Product code	Product name	Unit price	Quantity	Subtotal
				Calculated

2. Set the calculation field

- ① Open the “Total amount” field settings screen

Field Settings

Name *

Total amount

☐ Hide field name

Formula ? *

SUM(Subtotal)

☐ Hide formula

☒ Number (1000)

- ② Set a calculation formula

When calculating total values in a table, we will use the SUM function.

Here, in order to calculate the total amount for the **subtotal field**, we will enter “**SUM(Subtotal)**.”

※Enter SUM() in **half-size upper case letters**.

※Enter the field code you wish to calculate in the ().

Field Settings

Name *

Total amount

☐ Hide field name

Formula ? *

SUM(Subtotal)

☐ Hide formula

☒ Number (1000)

- ③ Change the field code

Change the field code to “**Total_amount**,” the same as the field name and click [Save] .

Currency

☒ Prefix

Field Code *

Total_amount

Cancel

Save

The calculation field that shows the total amount in your tables is complete!

Reception Date: 2017-04-30
Receptionist: [Search icon] [User icon]
Logged-in user: [X]
Client: [Text box]
Department: [Text box]
Person in charge: [Text box]
E-mail: [Text box]
Telephone: [Text box]

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

Total amount: [Text box]

Let's try calculating!

Enter the unit price and quantity, and check to see if the calculation results appear in the subtotal!

Reception Date: 2017-04-27
Receptionist: [Search icon] [User icon]
Logged-in user: Yudai Shibutani [X]
Client: [Text box]
Department: [Text box]
Person in charge: [Text box]
E-mail: [Text box]
Telephone: [Text box]

Product code	Product name	Unit price	Quantity	Subtotal
0001	kintone Light	780	100	78000
0002	kintone Standard	1500	500	750000
0003	Office Standard	500	30	15000
0004	Office Premium	800	40	32000

Total amount: 875000

Advanced techniques

- **Calculating dates and times**

In the calculation field, in addition to number, you can also calculate **Date&time**, **Date**, **Time**, and **duration**.

[Example: Calculation formula for Handling time (End– Start)]

The screenshot shows the 'Bozu Trading Company' form. The 'Name' field contains 'Handling time'. The 'Formula' dropdown menu is open, showing various options. An orange box highlights the 'End-Start' option, which is selected. An arrow points from the 'End - Start = Handling time' equation to the 'End-Start' option in the dropdown.

Name *

Handling time

Formula ? *

- ☒ End-Start
- ☐ Hide formula
- ☐ Number (1000)
- ☐ Number with thousands separator (1,000)
- ☐ Date & time (Aug 06, 2012 2:03 PM)
- ☐ Date (Aug 06, 2012)
- ☐ Time (2:03 PM)
- ☒ Hours & minutes (29 hours 47 minutes)
- ☐ Days & hours & minutes (1 day 5 hours 47 minutes)

Person in charge

Person in charge
Noboru Sato
Yudai Shibutani
Yudai Shibutani

End – Start = Handling time

- **Combining texts(single-line)**

You can also combine **texts(single-line)** from multiple fields.

Here, we will combine the texts(single-line) in the [First name] field with the [Last name] field, displaying them together in the [Full name] field.

- ① Place the “**Texts(single-line)**” field, and change the field name to “Full name.”
- ② Open the field’s settings screen, and check off “**Calculate automatically.**”
- ③ Use the “First name” and “Last name” field codes to enter the calculation formula

To combine character strings, use “&.” Here, we will enter “First_name &” “& Last_name.”

※ You can include spaces in the texts(single-line) with “ ”

Name *

Full name

☐ Hide field name

☒ Calculate automatically ?

First_name&* *&Last_name

☐ Hide formula

Date

2017-04-30

Full name

Yudai Shibutani

First name

Yudai

Last name

Shibutani


Calculation field usage examples

- **Transportation expenses settlement**

Because calculations are done automatically, you can use the calculation field for settling transportation expenses while preventing miscalculations.

Transportation expenses settlement

Reporter

 Noboru Sato

Reported date

Apr.2017

Date	Destination	Purpose	Path	Expenses
Apr 01, 2017	Bozu Trading Company	Project visit	Motoyawata→Nishihunabashi	154 YEN
Apr 08, 2017	Sato Trading Company	Project visit	Ichikawa→Yokohama	712 YEN
Apr 16, 2017	Shibuya Consultant	Project visit	Nihonbashi→Otemachi→Suidobashi	269 YEN
Apr 22, 2017	Cybozu	Return to office	Suidobashi→Otemachi→Nihonbashi	269 YEN

Total expenses


1,404 YEN

- **Managing budget records**

Automatic calculations can be utilized for managing budget records such as prospects, accepting orders, and gross margins.

Managing budget records

Person in charge

 Noboru Sato

Individual target budget

3,500,000 YEN

Budget difference(Budget-Total accepting order amount)

80,000 YEN

▼ List of prospective orders

Prospective order date	Prospective order name	Amount
Jul 07, 2017	Bozu Trading Company	1230000 YEN
May 18, 2017	Sato Trading Company	1350000 YEN
Apr 13, 2017	Shibuya Consultant	2230000 YEN

Total prospective order amount

4,810,000 YEN

▼ List of accepting orders

Accepting order date	Accepting order name	Amount
May 18, 2017	Sato Trading Company	1350000 YEN
Apr 13, 2017	Shibuya Consultant	2230000 YEN

Total accepting order amount

3,580,000 YEN

● Inquiry management

You can automatically calculate the time it took to handle an inquiry for inquiry management.

Inquiry management

Contact time

Apr 21, 2017 10:30

Receptionist

Noboru Sato

Client

Bozu Trading Company

Inquiry section

Claim

Inquiry

Their system suddenly stopped, so they want us to restore urgently.

▼Details

Date	Start	End	Handling time	Person in charge	Contents	result
Apr 21, 2017	10:30	10:40	0 hours 10 minutes	Noboru Sato	I explained that the person in charge will contact them during the day.	Not Yet
Apr 21, 2017	10:48	11:00	0 hours 12 minutes	Yudai Shibutani	I confirmed the situation on the phone. Today I will visit them to respond.	Not Yet
Apr 21, 2017	14:00	15:00	1 hours 0 minutes	Yudai Shibutani	I have visited at 14 o'clock. The work is completed. The cause seems to be because the customer erroneously deleted the system configuration file.	Done

Total handling time

1 hours 22 minutes



When you use calculations, your calculation results will be shown in a flash, making it very convenient!

If you use them with tables, you can utilize them in various settings.