



# Getting Started Guide



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# 1. Viewing & Editing Data



Portal

### Announcement

Our sales goal is to be one of the worldwide market leaders!

#### Sales Leads Management: Estimate Sales by Representative

Representative	Jan, 2021	Apr, 2021	May, 2021	Jun, 2021	Jul, 2021	Aug, 2021	Sep, 2021
Kevin	1,000,000	0	0	0	0	10,000,000	3,000,000
Mary	0	0	0	3,000,000	4,000,000	5,000,000	0
Jane Smith	0	0	8,000,000	8,000,000	0	0	0
David	0	0	0	0	10,000,000	0	0
Vince	0	0	0	1,000,000	1,000,000	0	3,000,000
Emma	0	0	0	0	0	8,000,000	1,000,000

6:22 PM Jane Smith

### Assigned to Me

- Biz Travel Request
- Expense Report

### Spaces

Joined Spaces

- Sales
- HR Space
- Events
- Sales Team

### Apps

Favorite Apps

- Product Database
- Document Library
- Biz Travel Request
- Customer Database
- Sales Leads Management**
- Applicant Tracking
- Logo/Image/Design Cabinet

### Notifications

All

- Trip from Paris to London f...  
Biz Travel Request  
You are assigned a task.
- Welcome to our team!  
Sales
- Case Study  
Expense Report  
Record updated.

**Here is the Kintone Portal Home. Click the app you want to open in the “Apps” list on the right-hand side of the portal. We will use the Sales Leads Management app as an example in this guide.**



# Sales Leads Management



App: Sales Leads Management



My Leads   



Records 1 - 20 of 24



	Lead Title	Status	Organization Name	Contact Name	Next Action Date	Next Action	Estimate Purchase	Estimate Total Sales	S
	January First Lead	Customer	<a href="#">Sample A</a>	Kyle	May 05, 2021		Jan 25, 2021	1,553,090	S
 	Gym Entrance Renewal	New	<a href="#">Corporation Sample</a>	Andrew	Apr 29, 2021	Send quotes...	Apr 25, 2021	8,389.99	S
	Website Renewal	Qualified	<a href="#">Company Example</a>	John	Apr 26, 2021		Apr 26, 2021	13,587	S
	Academic License	Quote	<a href="#">Sample D</a>	Kathleen	Apr 25, 2021		May 11, 2021	298,700	S
	NPO License	Negotiate	<a href="#">Corporation Sample</a>	Andrew	Apr 25, 2021		May 11, 2021	98,700	S
	Website Renewal	New	<a href="#">Company Example</a>	John	Apr 26, 2021		May 19, 2021	8,213,587	S
	New System Survey	New	<a href="#">Sample E</a>	David	May 07, 2021		Jun 17, 2021	1,288,900	S
	Data Transfer	New	<a href="#">Sample B</a>	Tom	May 13, 2021		Jun 22, 2021	896,295	S

**A list of the data stored in the app is displayed. We call this "List View. "**

**Let's look at the details of a specific lead account. Click the  icon circled in red.**

**Sales Leads Management**

App: Sales Leads Management > View: My Leads > Record: Gym Entrance Renewal

Status: **New** [Status History](#)

Lead Title:  Representative:

**Contact Info**

Organization Name:  Organization Website:

Contact Name:  Department:  Job Title:

Email:  Telephone #:

Price:  Quantity:  Estimate Total Sales:  Attachment:

Next Action Date:  Next Action:

**Activities**

Date	Activity	Details
Apr 25, 2021	Meet	First interview with clients

**Comments:**

Write your comment here.

2: David May 5, 2021 8:11 PM  
 @Jane Smith  
 I am preparing a quote for the client.  
 I will tell you after I have done it.

1: Jane Smith May 5, 2021 8:10 PM  
 @David  
 How is your progress?

The details for that specific lead are displayed, including data not shown in the list view.

**Sales Leads Management**

App: Sales Leads Management View: My Leads Record: Gym Entrance Renewal

Qualified Lead End Pursuit Change Assignee

Status: **New** Status History

Lead Title: Gym Entrance Renewal Representative: David

**Contact Info**

Organization Name: Corporation Sample Organization Website: <https://www.corporationsample.com>

Contact Name: Andrew Department: Finance Job Title: Finance Director

Email: [andrew@corporationsample.com](mailto:andrew@corporationsample.com) Telephone #: 551-545-5325

Price: 8,389.99 Quantity: 1 Estimate Total Sales: 8,389.99 Attachment: [plan0401.docx](#) (13 KB)

Next Action Date: Apr 29, 2021 Next Action: Send quotes to clients via email

**Activities**

Date	Activity	Details
Apr 25, 2021	Meet	First interview with clients

Write your comment here

2: David @Jane Smith May 5, 2021 8:11 PM  
I am preparing a quote for the client. I will tell you after I have done it.  
Like Reply

1: Jane Smith @David May 5, 2021 8:10 PM  
How is your progress?  
Like Reply



**Next, let's go ahead and edit and update the data for this lead. Click the  icon in the top right corner of the page (circled in red.)**

**Sales Leads Management**

App: Sales Leads Management | View: My Leads | Record: Gym Entrance Renewal

Cancel Save

Lead Title: Gym Entrance Renewal

Representative: David

**Contact Info**

Organization Name: Corporation Sample | Organization Website: https://www.corporationsample

Contact Name: Andrew | Department: Finance | Job Title: Finance Director

Email: andrew@corporationsamp | Telephone #: 551-545-5325

Price: 8389.99 | Quantity: 1 | Estimate Total Sales: 8,389.99

Attachment: plan0401.... 13 KB

Next Action Date: | Next Action:

Write your comment here.

2: David (May 5, 2021 8:11 PM)  
@Jane Smith  
I am preparing a quote for the client. I will tell you after I have done it.

1: Jane Smith (May 5, 2021 8:10 PM)  
@David  
How is your progress?

The data entry fields appear. You can now populate and edit the data fields. When you are done editing, click the **Save** button on the top left of the page (circled in red).

**Sales Leads Management**

App: **Sales Leads Management** | View: My Leads | Record: Gym Entrance Renewal

Qualified Lead | End P... | Change Assignee

Status: **New** | Status History

Lead Title: Gym Entrance Renewal | Representative: David

**Contact Info**

Organization Name: Corporation Sample | Organization Website: https://www.corporationsample.com

Contact Name: Andrew | Department: Finance | Job Title: Finance Director

Email: andrew@corporationsample.com | Telephone #: 551-545-5325

Price: 8,389.99 | Quantity: 1 | Estimate Total Sales: 8,389.99 | Attachment: plan0401.docx (13 KB)

Next Action Date: Apr 29, 2021 | Next Action: Send quotes to clients via email

**Activities**

Date	Activity	Details
Apr 25, 2021	Meet	First interview with clients

Write your comment here.

2: David | May 5, 2021 8:11 PM  
@Jane Smith  
I am preparing a quote for the client. I will tell you after I have done it.  
Like Reply

1: Jane Smith | May 5, 2021 8:10 PM  
@David  
How is your progress?  
Like Reply

**To go back to the list view, you can click the app name shown at the top of the page ("Sales Leads Management" in this example.)**

---

## 2. Adding New Data





**I got a new lead!  
Time to share the details with the team**

**Add the lead data to your **Sales Leads Management** app and share it with your team.**



## Sales Leads Management



App: Sales Leads Management



My Leads

Records 1 - 20 of 24

	Lead Title	Status	Organization Name	Contact Name	Next Action Date	Next Action	Estimate Purchas	Estimate Total Sales	S
	January First Lead	Customer	<a href="#">Sample A</a>	Kyle	May 05, 2021		Jan 25, 2021	1,553,090	S
2	Gym Entrance Renewal	New	<a href="#">Corporation Sample</a>	Andrew	Apr 29, 2021	Send quotes...	Apr 25, 2021	8,389.99	S
	Website Renewal	Qualified	<a href="#">Company Example</a>	John	Apr 26, 2021		Apr 26, 2021	13,587	S
	Academic License	Quote	<a href="#">Sample D</a>	Kathleen	Apr 25, 2021		May 11, 2021	298,700	S
	NPO License	Negotiate	<a href="#">Corporation Sample</a>	Andrew	Apr 25, 2021		May 11, 2021	98,700	S
	Website Renewal	New	<a href="#">Company Example</a>	John	Apr 26, 2021		May 19, 2021	8,213,587	S
	New System Survey	New	<a href="#">Sample E</a>	David	May 07, 2021		Jun 17, 2021	1,288,900	S
	Data Transfer	New	<a href="#">Sample B</a>	Tom	May 13, 2021		Jun 22, 2021	896,295	S

To add new data to the app, click the icon (circled in red) in the top right corner of the list view page.



# Sales Leads Management



App: Sales Leads Management



Cancel

Save



Lead Title

Website renewal

Representative



Kevin



## ▼ Contact Info

Organization Name

Corporation Sample

Lookup

Clear

Organization Website

https://www.corporationsample

Contact Name

Andrew

Department

Finance

Job Title

Finance Director

Email

andrew@corporationsamp

Telephone #

551-545-5325

Fill in the required fields and click the  button to create a new record.

---

## 3. Viewing Change History



**Sales Leads Management**

App: Sales Leads Management > View: My Leads > Record: Website Renewal

Sent Quote | End Pursuit | Change Assignee

Status: **Qualified** [Status History](#)

Lead Title: Website Renewal  
Representative: Jane Smith, Mary

**Contact Info**

Organization Name: Company Example  
Organization Website: https://www.sampleb.com

Contact Name: John  
Department: Customer Success  
Job Title:

Email: john@corporationexample.com  
Telephone #:

Price: 13,587 | Quantity: 1 | Estimate Total Sales: 13,587 | Attachment:

Next Action Date: Apr 30, 2021 | Next Action: Have a web meeting

**Activities**

Date	Activity	Details
Apr 26, 2021	Email	Send quotes to clients via email

Write your comment here.

No comments are available.



Open the lead details page and click the  icon (circled in red) in the top right corner of the page.

**Sales Leads Management**

App: Sales Leads Management > View: My Leads > Record: Website Renewal

Sent Quote | End Pursuit | Change Assignee

Status: **Qualified** [Status History](#)

Lead Title: Website Renewal  
 Representative: Jane Smith, Mary

**Contact Info**

Organization Name: Company Example | Organization Website: https://www.sample.com

Contact Name: John | Department: Customer Success | Job Title: [Empty]

Email: john@corporationexample.com | Telephone #: [Empty]

Price: 13,587 | Quantity: 1 | Estimate Total Sales: 13,587 | Attachment: [Empty]

Next Action Date: Apr 30, 2021 | Next Action: Have a web meeting

**Activities**

Date	Activity	Details
Apr 26, 2021	Email	Send quotes to clients via email

**History**

Show Latest Contents

8: Kevin 12:30 AM  
 Representative: Removed the following user:  
 Selected the following user:  
 Show Update Details  
 Restore Previous Version

7: Kevin Mar 2 11:20 PM  
 Next Action Date: Changed from "Apr 26, 2021" to "Apr 30, 2021"  
 Next Action: Entered "Have a web meeting"  
 Activity: Selected Email  
 Details: Entered "Send quotes to clients via email"  
 Show Update Details  
 Restore Previous Version

6: Kevin Mar 2 7:27 PM  
 Email: Entered  
 "john@corporationexample.com"  
 Show Update Details  
 Restore Previous Version

The history of all the edits that have been made to this lead appears.

**Sales Leads Management**

App: Sales Leads Management | View: My Leads | Record: Website Renewal

Sent Quote | End Pursuit | Change Assignee

Lead Title: Website Renewal | Representative: Jane Smith, Vince

**Contact Info**

Organization Name: Company Example | Organization Website: https://www.sampleb.com

Contact Name: John | Department: Customer Success | Job Title:

Email: john@corporationexample.com | Telephone #:

Price: 13,587 | Quantity: 1 | Estimate Total Sales: 13,587 | Attachment:

Next Action Date: Apr 30, 2021 | Next Action: Have a web meeting

**Activities**

Date	Activity	Details
Apr 26, 2021	Email	Send quotes to clients via email

**History**

Show Latest Contents

8: Kevin (12:30 AM)  
 Representative: Removed the following user: Vince  
 Selected the following user: Mary  
 Show Update Details  
 Restore Previous Version

7: Kevin (Mar 2 11:20 PM)  
 Next Action Date: Changed from "Apr 26, 2021" to "Apr 30, 2021"  
 Next Action: Entered "Have a web meeting"  
 Activity: Selected Email  
 Details: Entered "Send quotes to clients via email"  
 Show Update Details  
 Restore Previous Version

6: Kevin (Mar 2 7:27 PM)  
 Email: Entered "john@corporationexample.com"  
 Show Update Details  
 Restore Previous Version

Click "Show Update Details" to show the changed fields in that version highlighted in green.

**Sales Leads Management**

App: Sales Leads Management > View: My Leads > Record: Website Renewal

Sent Quote | End Pursuit | Change Assignee

Status: **Qualified** [Status History](#)

Lead Title: Website Renewal  
 Representative: Jane Smith, Mary

**Contact Info**

Organization Name: Company Example  
 Organization Website: https://www.sample.com

Contact Name: John  
 Department: Customer Success  
 Job Title: [Empty]

Email: john@corporationexample.com  
 Telephone #: [Empty]

Price: 13,587 | Quantity: 1 | Estimate Total Sales: 13,587 | Attachment: [Empty]

Next Action Date: Apr 30, 2021  
 Next Action: Have a web meeting

**Activities**

Date	Activity	Details
Apr 26, 2021	Email	Send quotes to clients via email

**History**

Show Latest Contents

8: Kevin 12:30 AM  
 Representative: Removed the following user:  
 Vince  
 Selected the following user:  
 Mary  
 Show Update Details  
 Restore Previous Version

7: Kevin Mar 2 11:20 PM  
 Next Action Date: Changed from "Apr 26, 2021" to "Apr 30, 2021"  
 Next Action: Entered "Have a web meeting"  
 Activity: Selected Email  
 Details: Entered "Send quotes to clients via email"  
 Show Update Details  
 Restore Previous Version

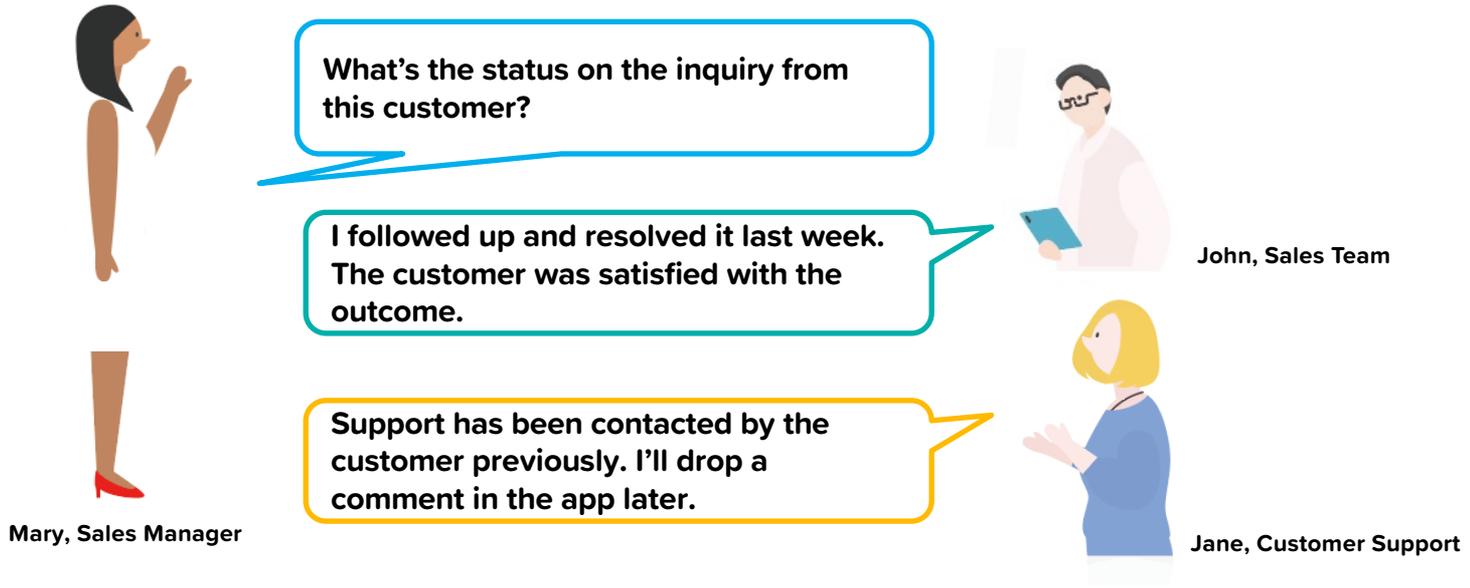
6: Kevin Mar 2 7:27 PM  
 Email: Entered  
 "john@corporationexample.com"  
 Show Update Details  
 Restore Previous Version

**Click "Restore Previous Version" to reverse all changes made in that edit. Take advantage of this feature when you accidentally overwrite data or in other cases where you need to restore data to an earlier state.**

---

## 4. Writing a Comment





**Kintone allows you to write comments that are tied to specific data entries. When managing customer relations, this functionality allows you to see both the lead account data as well as all communications, discussions, and inquiries associated with that lead - all on the same screen.**

**All data and comments are saved unless deleted. This makes it easy to review logs and hand over leads to colleagues.**

**Let's write a comment of your own.**

The screenshot displays the 'Sales Leads Management' application interface. At the top, there is a green header with a briefcase icon and the title 'Sales Leads Management'. Below the header, a breadcrumb trail shows 'App: Sales Leads Management' > 'View: My Leads' > 'Record: Website Renewal'. A secondary navigation bar contains three buttons: 'Qualified Lead', 'End Pursuit', and 'Change Assignee'. To the right of these buttons is a toolbar with icons for sharing (labeled '共有する'), undo, redo, add, edit, print, settings, and a menu. The main content area is divided into two sections. The left section, with a light green background, shows lead details: 'Status: New' with a 'Status History' link, 'Lead Title: Website Renewal', and 'Representative: Jane Smith'. Below this is a 'Contact Info' section with fields for 'Organization Name' (Company Example), 'Organization Website' (https://www.sampleb.com), 'Contact Name' (John), 'Department' (Customer Success), and 'Job Title'. The right section is a comment field with a 'Mention' tab, a text input area containing '@Jane Smith' and 'Hi, how is your progress?', a 'Cancel' button, and a 'Post' button. A red circle highlights the text input area, and another red circle highlights the 'Post' button. Below the comment field, it states 'No comments are available.'

The column on the right-hand side of the lead details page is the comment field (circled in red.) Write a comment in the text box and click **Post** (circled in red). If you tag a recipient, that person will receive a notification when you post the comment.

**Sales Leads Management**

App: Sales Leads Management | View: My Leads | Record: Website Renewal

Qualified Lead | End Pursuit | Change Assignee

Status: **New** | Status History

Lead Title: Website Renewal | Representative: Jane Smith

**Contact Info**

Organization Name: Company Example | Organization Website: https://www.sampleb.com

Contact Name: John | Department: Customer Success | Job Title: [Empty]

Email: [Empty] | Telephone #: [Empty]

Write your comment here.

2: Jane Smith @Mary 1:46 AM  
I am preparing a quote for the client. I will tell you after I have done it.  
Like Reply

1: Mary @Jane Smith 1:45 AM  
Hi, how is your progress?  
Like Reply

**Use the comment field to organize your communication by lead and to ask for advice, give instructions, or share information - all on the same screen.**

---

## 5. Searching & Filtering Data



**Search in App**

App: Sales Leads Management

My Leads

Records 1 - 20 of 25

	Lead Title	Status	Organization Name	Contact Name	Next Action Date	Next Action	Estimate Purchase Date	Estimate Total Sales	SubT
	January First Lead	Customer	<a href="#">Sample A</a>	Kyle	May 05, 2021		Jan 25, 2021	1,553,090	Show
2	Gym Entrance Re...	New	<a href="#">Corporation Sample</a>	Andrew	Apr 29, 2021	Send quot...	Apr 25, 2021	8,389.99	Show
	Website Renewal	Qualified	<a href="#">Company Example</a>	John	Apr 30, 2021	Have a we...	Apr 26, 2021	13,587	Show
	Academic License	Quote	<a href="#">Sample D</a>	Kathleen	Apr 25, 2021		May 11, 2021	298,700	Show
	NPO License	Negotiate	<a href="#">Corporation Sample</a>	Andrew	Apr 25, 2021		May 11, 2021	98,700	Show
	Website Renewal	New	<a href="#">Company Example</a>	John	Apr 26, 2021		May 19, 2021	8,213,587	Show

**First, let's do a keyword search in the Sales Leads Management app.**

**Enter the keyword you want to search for in the text box labeled "Search in App" in the top right corner, and click the  icon.**

Search Results
Sales Leads Management NPO License
NPO License
Sales Leads Management by Jane Smith Apr 27, 2021 1:16 AM

No more records.

NPO
Search in Sales Leads Management
Sort by Created time Relevance
Created by
Created Date Range
Search

The search results are displayed on the left-hand side of the page. Click the blue text to go to the detailed view.

Search Results



Sales Leads Management NPO License

NPO License

Sales Leads Management by Jane Smith Apr 27, 2021 1:16 AM

No more records.

NPO

Search in Sales Leads Management

Sort by  Created time  Relevance

Created by

Created Date Range

Search

Using the settings on the right-hand side, you can configure your search criteria, including search range, Created by, and Created Date Range.

 Jane Smith

Sales Leads Management

App: Sales Leads Management

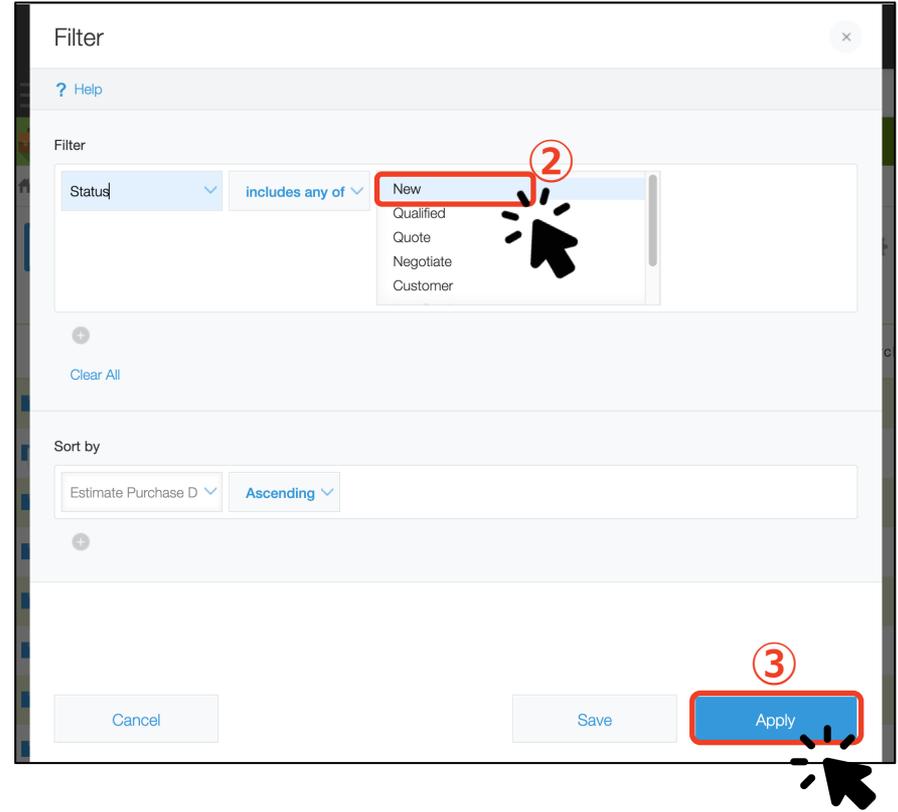
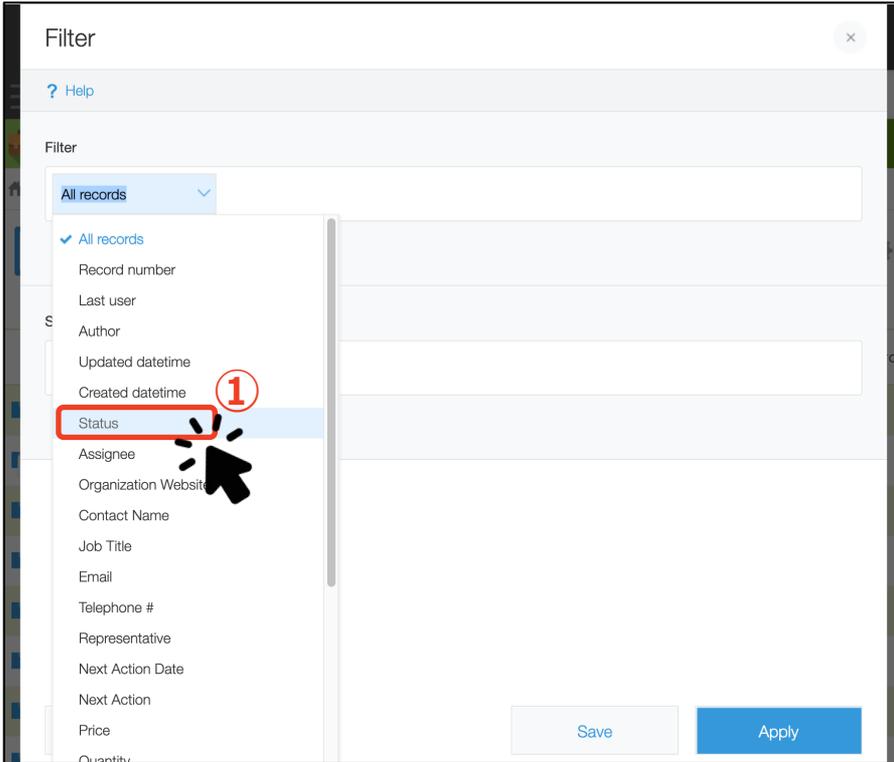
My Leads  

Records 1 - 20 of 25

	Lead Title	Status	Organization Name	Contact Name	Next Action Date	Next Action	Estimate Purchase Date	Estimate Total Sales	SubT
	January First Lead	Customer	<a href="#">Sample A</a>	Kyle	May 05, 2021		Jan 25, 2021	1,553,090	Show
 2	Gym Entrance Re...	New	<a href="#">Corporation Sample</a>	Andrew	Apr 29, 2021	Send quot...	Apr 25, 2021	8,389.99	Show
	Website Renewal	Qualified	<a href="#">Company Example</a>	John	Apr 30, 2021	Have a we...	Apr 26, 2021	13,587	Show
	Academic License	Quote	<a href="#">Sample D</a>	Kathleen	Apr 25, 2021		May 11, 2021	298,700	Show
	NPO License	Negotiate	<a href="#">Corporation Sample</a>	Andrew	Apr 25, 2021		May 11, 2021	98,700	Show
	Website Renewal	New	<a href="#">Company Example</a>	John	Apr 26, 2021		May 19, 2021	8,213,587	Show

**Next, filter the data in the Sales Leads Management app.**

**Open the Sales Leads Management app list view page and click the  icon.**



**Set the filter conditions you want to apply.**

**In this example, filter to only display data entries where the value for Status is set to "New. "**

**Sales Leads Management**

App: Sales Leads Management

My Leads

Records 1 - 18 of 18

	Lead Title	Status	Organization Name	Contact Name	Next Action Date	Next Action	Estimate Purchase Date	Estimate Total Sales	SubTable	
2	Gym Entrance ...	New	Corporation Sample	Andrew	Apr 29, 2021	Send quot...	Apr 25, 2021	8,389.99	Show ▾	
	Website Renewal	New	Company Example	John	Apr 26, 2021	Send Email	May 19, 2021	8,213,587	Show ▾	
	New System S...	New	Sample E	David	May 07, 2021	Online me...	Jun 17, 2021	1,288,900	Show ▾	
	Data Transfer	New	Sample B	Tom	May 13, 2021	Send quotes	Jun 22, 2021	896,295	Show ▾	
	January First L...	New	Sample A	Kyle	May 19, 2021	Online me...	Jun 23, 2021	3,553,090	Show ▾	
2	Website Renewal	New	Company Example	John	Apr 26, 2021	Invite to w...	Jun 23, 2021	13,587	Show ▾	
	Website Renewal	New	Company Example	John	Apr 26, 2021	Send Email	Jun 24, 2021	8,213,587	Show ▾	
	New System S...	New	Sample E	David	Apr 26, 2021	Invite to w...	Jul 07, 2021	88,900	Show ▾	
	New System S...	New	Sample E	David	Apr 26, 2021	Online me...	Jul 16, 2021	1,288,900	Show ▾	
	January First L...	New	Sample A	Kyle	Apr 25, 2021	Online me...	Jul 28, 2021	3,553,090	Show ▾	
	Website Renewal	New	Company Example	John	Apr 26, 2021	Send quotes	Jul 28, 2021	213,587	Show ▾	

**The app now only displays leads where the value for Status is "New."**

---

## 6. Generating Graphs & Charts





**I need to report a summary of the entire team's sales activity, but it's such a hassle.**

**With Kintone, you can aggregate the data stored in your app and transform it into graphs and tables.**

**When creating a graph, Kintone will automatically suggest recommended graphs based on the data in the app. With just a few clicks, you can also quickly fine-tune the conditions to be used to generate your graph.**

**Let's see if we can generate a graph from the data in the Sales Leads Management app.**

**Sales Leads Management**

App: Sales Leads Management

My Leads [Filter] [Chart] [Settings] [More]

Records 1 - 20 of 25

	Lead Title	Priority	Status	Organization Name	Contact Name	Next Action Date	Next Action	Estimate Purchase Date	Estimate Total Sales	SubTable	
	January Fir...	1	Customer	Sample A	Kyle	May 05, 2021	Online me...	Jan 25, 2021	1,553,090	Show ▶	
2	Gym Entra...	1	New	Corporation Sample	Andrew	Apr 29, 2021	Send quot...	Apr 25, 2021	8,389.99	Show ▶	
	Website Re...	3	Qualified	Company Example	John	Apr 30, 2021	Have a we...	Apr 26, 2021	13,587	Show ▶	
	Academic ...	3	Quote	Sample D	Kathleen	Apr 25, 2021	Invite to w...	May 11, 2021	298,700	Show ▶	
	NPO Licen...	3	Negotiate	Corporation Sample	Andrew	Apr 25, 2021	Send Email	May 11, 2021	98,700	Show ▶	
	Website Re...	1	Qualified	Company Example	John	Apr 26, 2021	Send Email	May 19, 2021	8,213,587	Show ▶	
	New Syste...	1	New	Sample E	David	May 07, 2021	Online me...	Jun 17, 2021	1,288,900	Show ▶	
	Data Transfer	2	Quote	Sample B	Tom	May 13, 2021	Send quotes	Jun 22, 2021	896,295	Show ▶	
	January Fir...	1	Negotiate	Sample A	Kyle	May 19, 2021	Online me...	Jun 23, 2021	3,553,090	Show ▶	
2	Website Re...	3	Quote	Company Example	John	Apr 26, 2021	Invite to w...	Jun 23, 2021	13,587	Show ▶	
	Website Re...	1	New	Company Example	John	Apr 26, 2021	Send Email	Jun 24, 2021	8,213,587	Show ▶	

Go to the list view page and click the  icon (circled in red) to create a graph.

# Create Graph

? Help

Design a Graph Starting from Graph Type



Bar chart



Column chart



Pie chart



Line chart



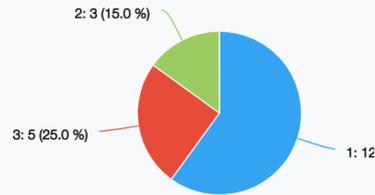
Pivot Table



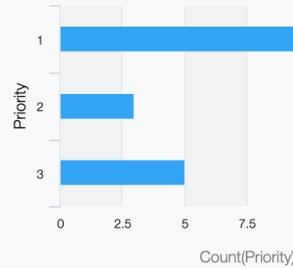
Others

Use a Recommended Graph

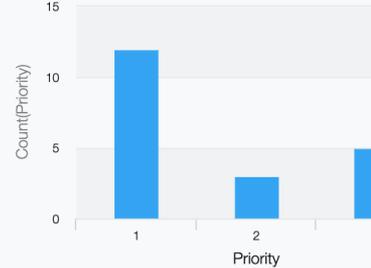
Count(Priority)



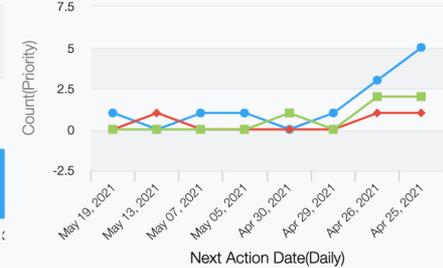
Count(Priority)



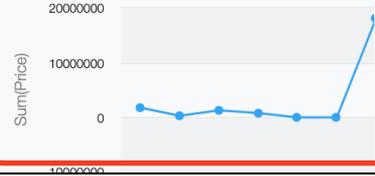
Count(Priority)



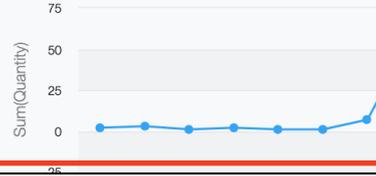
Count(Priority)



Sum(Price)



Sum(Quantity)



Kintone automatically reads the data stored in the app and suggests recommended graphs.

### Create Graph

? Help

Graph Options

Chart Type  
Pie chart

Group by  
Level 1: Priority

Function  
Count

Filter  
All records

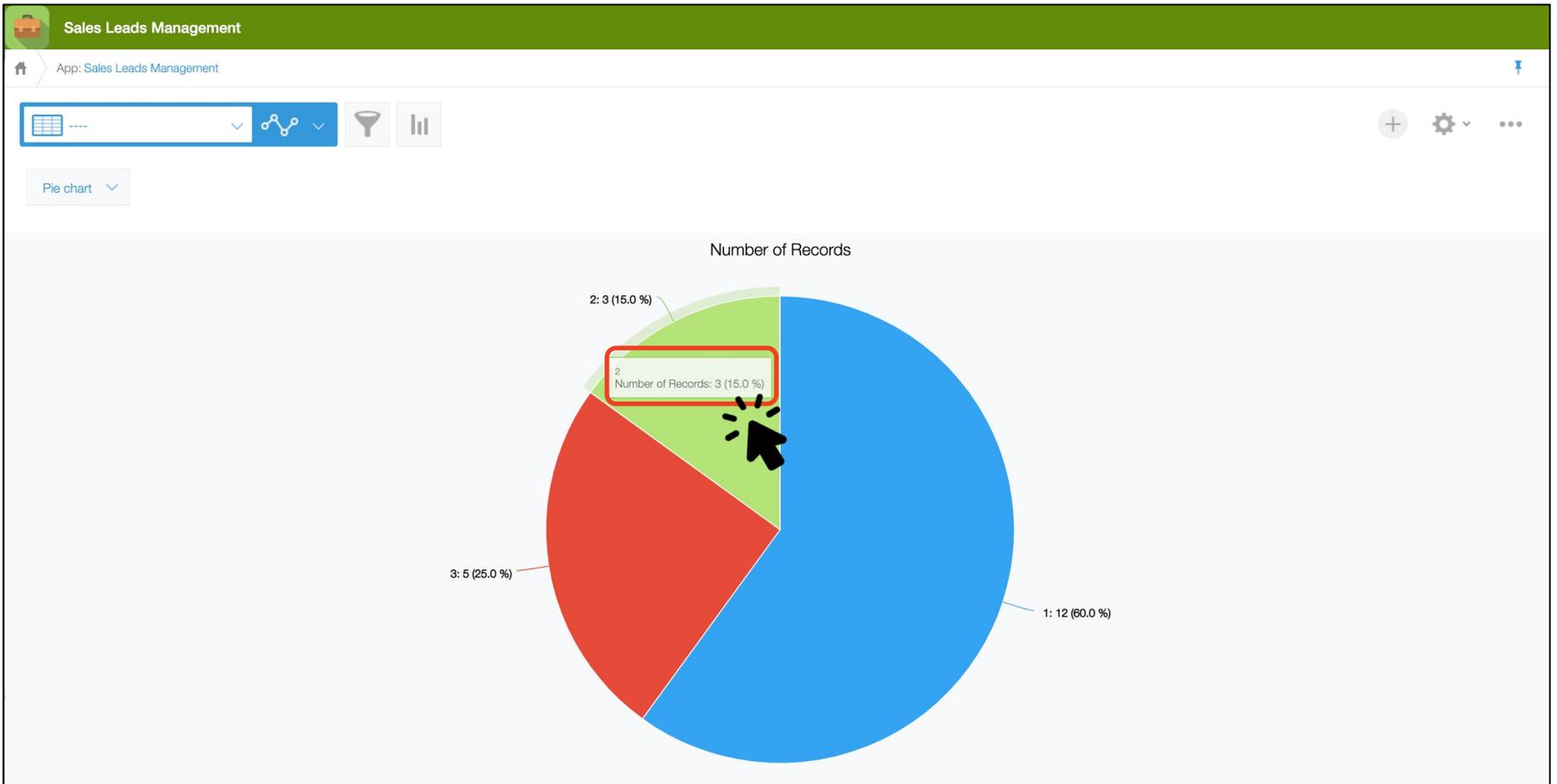
Sort by  
Total Descending

Preview

Category	Count	Percentage
1	12	60.0%
2	3	15.0%
3	5	25.0%

Buttons: Cancel, Back, Save as New Graph, Apply

Select one of the recommended graphs and click  to generate your graph.



**Clicking a piece of the pie opens a list view page of all data entries corresponding to that graph section.**

**Sales Leads Management**

App: Sales Leads Management

My Leads

Records 1 - 3 of 3

Lead Title	Priority	Status	Organization Name	Contact Name	Next Action Date	Next Action	Estimate Purchase Date	Estimate Total Sales	SubTable	
Data Transfer	2	Quote	Sample B	Tom	May 13, 2021	Online me...	Jun 22, 2021	896,295	Show ▶	
Website Renewal	2	Qualified	Company Example	John	Apr 26, 2021	Send quotes	Jul 28, 2021	213,587	Show ▶	
Data Transfer	2	New	Sample B	Tom	Apr 25, 2021	Send Email	Jul 28, 2021	596,295	Show ▶	

Records 1 - 3 of 3

In this example, we have been navigated to a list view page of all data entries where the value for Priority is 2, which is just one of the many ways you can take advantage of graphs.

## Create Graph

? Help

Design a Graph Starting from Graph Type



Bar chart



Column chart



Pie chart



Line chart



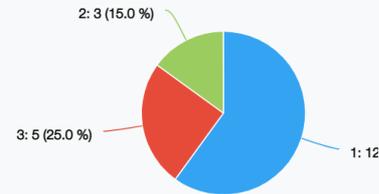
Pivot Table



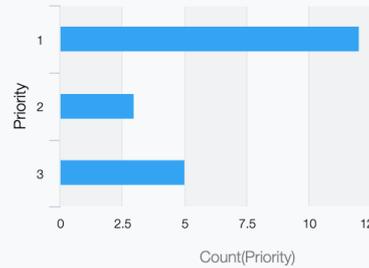
Others

Use a Recommended Graph

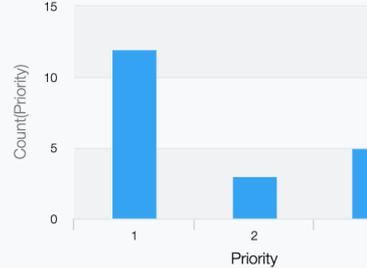
Count(Priority)



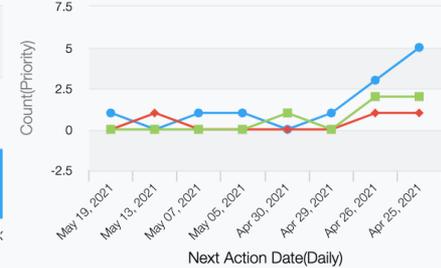
Count(Priority)



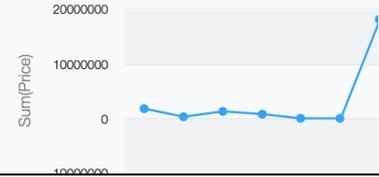
Count(Priority)



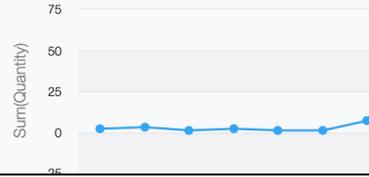
Count(Priority)



Sum(Price)



Sum(Quantity)



**Next, we will look at how you can manually generate a graph. Select the type of graph you want. Let's go with a bar chart in this example.**

### Create Graph

? Help

Graph Options

Chart Type

Bar chart | Clustered

Group by

Level 1: Priority

Function

Count

Filter

All records

Sort by

Total | Descending

Cancel | Back | Save as New Graph | **Apply**

Preview

Priority	Number of Records
1	12
2	3
3	5

Set how data is calculated and presented in the graph.

When you have completed the settings, click **Apply** (circled in red) to generate the graph.

### Create Graph

? Help

Graph Options

Chart Type  
Bar chart | Clustered

Group by  
Level 1: Priority

Function  
Count

Filter  
All records

Sort by  
Total | Descending

Preview

Priority	Number of Records
1	12
2	3
3	5

Buttons: Cancel, Back, **Save as New Graph**, Apply

You can also retain the graph settings by clicking  (circled in red).

**Sales Leads Management**

App: Sales Leads Management

Records 1 - 20 of 25

Lead Title	Department	Representative	Estimate Purchase Date	Estimate Total Sales
Academic	Marketing	David	Jul 27, 2021	9,870,000
Data Transfer	Inside Sales	Emma	Oct 28, 2021	296,295
Growth Research	HR	Mary	Aug 24, 2021	1,553,090
January First Lead	Sales	Mary Kevin	Jan 25, 2021	1,553,090
Website Renewal	Customer Success	Jane Smith Mary	Apr 26, 2021	13,587
New System Survey	IT	Vince	Jul 07, 2021	88,900
Data Transfer	Inside Sales	Emma	Jul 28, 2021	596,295

**Graph Settings Menu:**

- Monthly Sales by Representative
- Estimate Sales by Month line chart
- Estimate Sales by Month table chart
- Estimate Sales by Representative
- By Department
- Priority Bar Chart

You can display saved graph settings at any time from the  menu.

---

## 7. Using Spaces





**There are more apps and graphs to keep track of now. Can we manage all of this in one, central portal?**

**Kintone lets you manage multiple apps in a dedicated place, known as a "Space." You can place Graphs and Views generated in your apps into the Space to turn it into a portal.**

**By creating a dedicated Space for each department or project and consolidating all information related to the team in one Space, you can efficiently find the information you need. You can also create separate message boards within a Space, which we call "Threads."**

Sales

Public Space Add to Favorites

Announcement

Our sales goal is to be one of the worldwide market leaders!

Sales Leads Management: Estimate Sales by Representative

Representative	Jan, 2021	Apr, 2021	May, 2021	Jun, 2021	Jul, 2021	Aug, 2021	Sep, 2021	Oct, 2021	Mar, 2022
Kevin	~1,000,000	~1,000,000	~1,000,000	~1,000,000	~1,000,000	~10,000,000	~3,000,000	~1,000,000	~1,000,000
Mary	~1,000,000	~1,000,000	~1,000,000	~1,000,000	~1,000,000	~5,000,000	~1,000,000	~1,000,000	~1,000,000
Jane Smith	~1,000,000	~1,000,000	~8,000,000	~5,000,000	~1,000,000	~1,000,000	~1,000,000	~1,000,000	~1,000,000
David	~1,000,000	~1,000,000	~1,000,000	~1,000,000	~8,000,000	~1,000,000	~1,000,000	~1,000,000	~1,000,000
Vince	~1,000,000	~1,000,000	~1,000,000	~1,000,000	~1,000,000	~1,000,000	~1,000,000	~1,000,000	~1,000,000
Emma	~1,000,000	~1,000,000	~1,000,000	~1,000,000	~1,000,000	~1,000,000	~5,000,000	~1,000,000	~1,000,000

To Do: All Active To Do

To Do

Planning

Planning

Apr 13, 2021 In progress Urgent

Mary

Kevin Mary

Threads

Welcome to our team! Feb 27 4:45 PM

Expense Report Jun 4, 2021 7:57 PM

FAQ Apr 26, 2021 12:36 AM

Our Goal 2021 Apr 26, 2021 12:36 AM

Budget Apr 26, 2021 12:35 AM

Sales Apr 26, 2021 12:34 AM

Apps

Product Database

Prospects & Customers

Sales & Leads

Product Database

Prospects & Customers

Sales & Leads

People

Members

Create message boards for specific topics.

Place Graphs and Views into the Space.

Here is a Space.

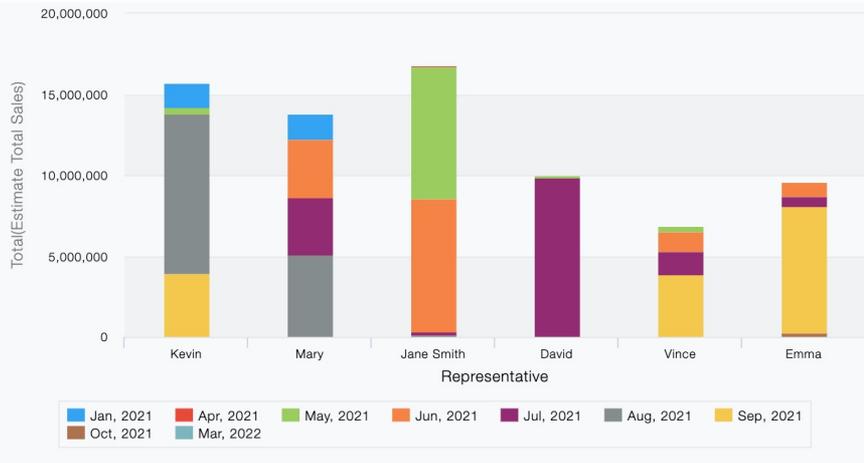
You can put graphs and Views to give a summarized view of your data and create Threads (message boards) dedicated to specific topics.



Announcement

Our sales goal is to be one of the worldwide market leaders!

Sales Leads Management: Estimate Sales by Representative



Mar 2 6:22 PM Jane Smith



Notifications



Assigned to Me

Expense Report



Spaces

All Spaces

Sales

HR Space

Events

Sales Team



Apps

All Apps

Shipping Order Form

Product Database

Prospects & Customers

Sales & Leads

Product Database

Let's open the Sales Space from Portal Home.  
Click the large icon labeled "Sales."

Sales Public Space Add to Favorites

### Announcement

Our sales goal is to be one of the worldwide market leaders!

**Sales Leads Management: Estimate Sales by Representative**

**To Do: All Active To Do**

Records 1 - 5 of 7

To Do	Due date	Status	Priority	Assigned to
Planning	Apr 13, 2021	In progress	Urgent	Kevin, Mary
Planning	Apr 13, 2021	In progress	Urgent	Kevin, Mary

### Threads

Welcome to our team! Feb 27 4:45 PM

Expense Report Jun 4, 2021 7:57 PM

FAQ Apr 26, 2021 12:36 AM

Our Goal 2021 Apr 26, 2021 12:36 AM

Budget Apr 26, 2021 12:35 AM

Sales Apr 26, 2021 12:34 AM

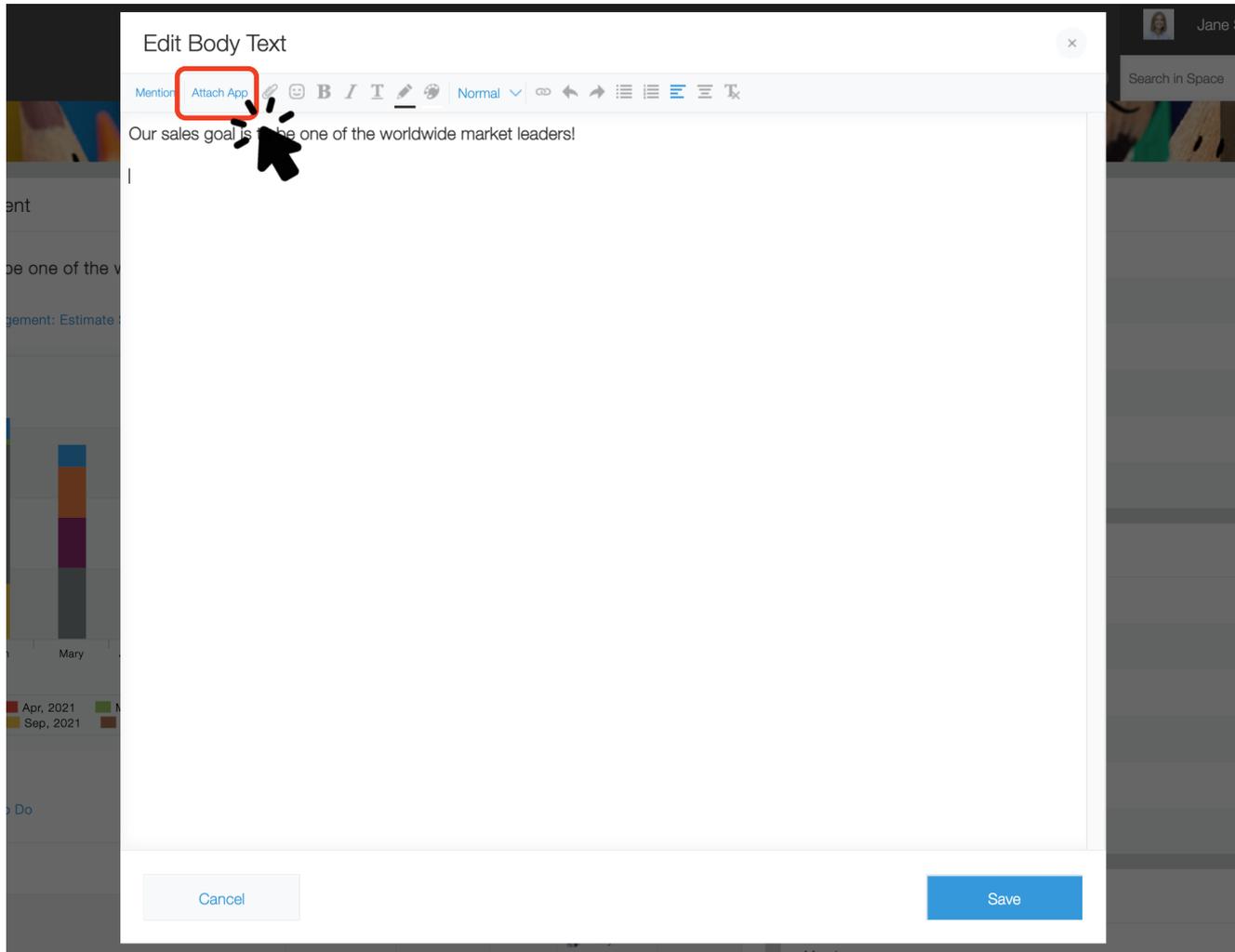
### Apps

- Product Database
- Prospects & Customers
- Sales & Leads
- Product Database
- Prospects & Customers
- Sales & Leads

### People

Members

**Place a list view of an app in the Sales Space.**  
**Click the icon (circled in red) to edit the Space.**



**On this dialog box, you can write text freely.  
To place a graph or list view, click [Attach App](#) .**

Edit Body Text

### Attach App

All Apps Favorites

Search Apps...

View: All Leads Graph: Select...

Sales Leads Management

Sales Leads Management: All Leads

Records 1 - 5 of 25 # per Page 5

Lead Title	Organization Name	Department	Representative	Estimate Purch
Academi...	Sample D	Marketing	David	Jul 27, 2021
Data Tra...	Sample B	Inside Sales	Emma	Oct 28, 2021
Growth ...	Sample C	HR	Mary	Aug 24, 2021
January ...	Sample A	Sales	Mary Kevin	Jan 25, 2021
Website ...	Company Example	Customer ...	Jane Smith	Apr 26, 2021

Cancel OK

**Select the target app and choose the graph or list view you want to place. When you have made your selection, click .**



Sales Public Space Add to Favorites

Announcement

Our sales goal is to be one of the worldwide market leaders!

Sales Leads Management: All Leads Records 1 - 5 of 25 >

	Lead Title	Organization Name	Department	Representative	Estimate Purchase Date	Estim
	Acade...	<a href="#">Sample D</a>	Marketing	David	Jul 27, 2021	
	Data Tr...	<a href="#">Sample B</a>	Inside Sales	Emma	Oct 28, 2021	
	Growth ...	<a href="#">Sample C</a>	HR	Mary	Aug 24, 2021	
	January...	<a href="#">Sample A</a>	Sales	Mary Kevin	Jan 25, 2021	
	Website...	<a href="#">Company Example</a>	Customer...	Jane Smith Mary	Apr 26, 2021	

Threads

- Welcome to our team! Feb 27 4:45 PM
- Expense Report Jun 4, 2021 7:57 PM
- FAQ Apr 26, 2021 12:36 AM
- Our Goal 2021 Apr 26, 2021 12:36 AM
- Budget Apr 26, 2021 12:35 AM
- Sales Apr 26, 2021 12:34 AM

Apps

- Product Database
- Prospects & Customers
- Sales & Leads
- Product Database

**We have successfully placed a list view in the Sales Space. Compiling all of the data you and the team need to check on one screen allows you to find the information you need more efficiently.**