



Let's use it conveniently

basic guidebook

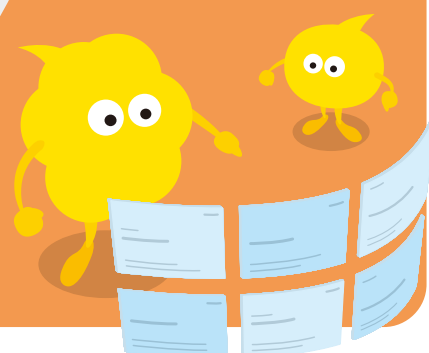
vol. 05

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	Receptionist
Jan 12, 2017	Yudai Shibutani
Client	
Cybozu Co. Ltd.	
E-mail	Telephone
sato@cybozu.co.jp	03-1234-5678
Product code	Product name
K001	kintone Light
O001	Office Standard

Reception date	Receptionist
Feb 02, 2017	Yudai Shibutani
Client	
Cybozu Co. Ltd.	
E-mail	Telephone
sato@cybozu.co.jp	03-1234-5678
Product code	Product name
K001	kintone Light
O001	Office Standard

Reception date	Receptionist
Mar 29, 2017	Yudai Shibutani
Client	
Cybozu Co. Ltd.	
E-mail	Telephone
sato@cybozu.co.jp	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]

The screenshot shows a form for the Order Management App. At the top, there are fields for Client (Bozu Trading Company), Department, and Person in charge. Below these are fields for E-mail and Telephone. A callout box labeled '① Enter "Client"' points to the Client field. Below the form fields is a table with columns: Product code, Product name, Unit price, Quantity, and Subtotal. Below the table is a 'Total amount' field. At the bottom, there is a 'Order history list' table with columns: Reception date, Department, Person in charge, and Total amount. A callout box labeled '② The order list with the same client in the "Order Management App" is automatically displayed' points to the 'Order history list' table.

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.

The screenshot shows the form editor interface. On the left is a 'Parts list' with various field types. The 'Related Records' field is highlighted with a callout box labeled '① Place the "Related Records" field'. On the right is the form being edited, which includes fields for Reception Date, Receptionist, Client, Department, Person in charge, E-mail, and Telephone. Below these fields is a 'Product code' field. At the bottom of the form, there is a 'Related Records (Settings required.)' field, which is also highlighted with a callout box labeled '①'.

2. Set up the “Related Records” field

① Open the “Related Records” field settings screen

Displays the “Related Records” field settings screen

The screenshot shows the 'Form' tab of a software interface. On the left is a 'Save Form' button and a list of field types: Label, Rich text, Number, Radio Button, Multi-choice, Date, Date and time, Link, Department selectio, Related Records, Blank space, Field group, Text (single-line), Text Box (multi-line), Calculated, Check box, Drop-down, Time, Attachment, User selection, Group selection, Lookup, and Border. The main area displays a form with fields for Reception date (2017-05-26), Receptionist (Logged-in user), Client, Department, Person in charge, E-mail, and Telephone. Below these is a table with columns: Product code, Product name, Unit price, and Quantity. The 'Related Records' field is highlighted with a red box and a red circle containing the number 1. A red arrow points from the text '① Open the “Related Records” field settings screen’ to the highlighted field.

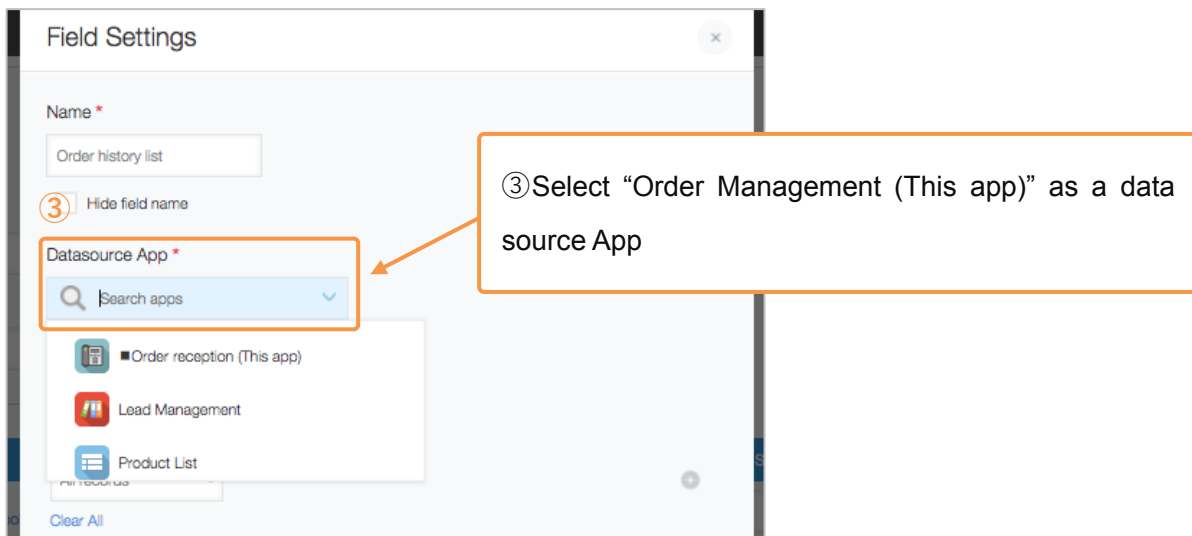
② Change the field name

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

The screenshot shows the 'Field Settings' dialog box. The 'Name' field is highlighted with a red box and a red circle containing the number 2. The text 'Order history list' is entered in the 'Name' field. A red arrow points from the text '② Change the field name to “Order history list.”’ to the highlighted field. Other fields in the dialog include 'Datasource App' (Search apps), 'Fetch Criteria' (Field in this app = (equal to) Field in datasource app), 'Filter' (All records), and 'Datasource App Fields to Display'.

③ Select a data source app

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

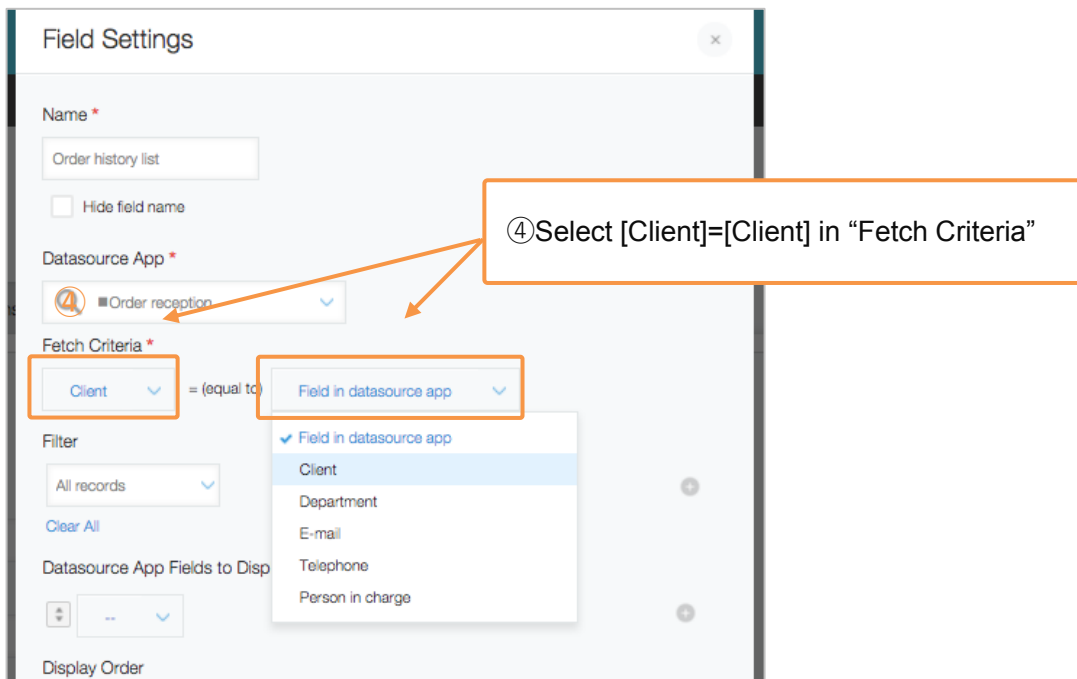


④ Select the conditions for "Fetch Criteria"

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.

Client = (equal to) Client

Filter: All records

Clear All

Datasource App Fields to Display *

- Reception date
- Department
- Person in charge
- Total amount

Display Order: Reception date, Descending

Max Records to Display at a Time: 5

Field Code *: Related_Records_0

⑤ Leave “All records”

⑥ Click [+] to add as necessary

⑥ Select a field you want to display

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.”

Person in charge

Total amount

Display Order: Reception date, Descending

Max Records to Display at a Time: 5

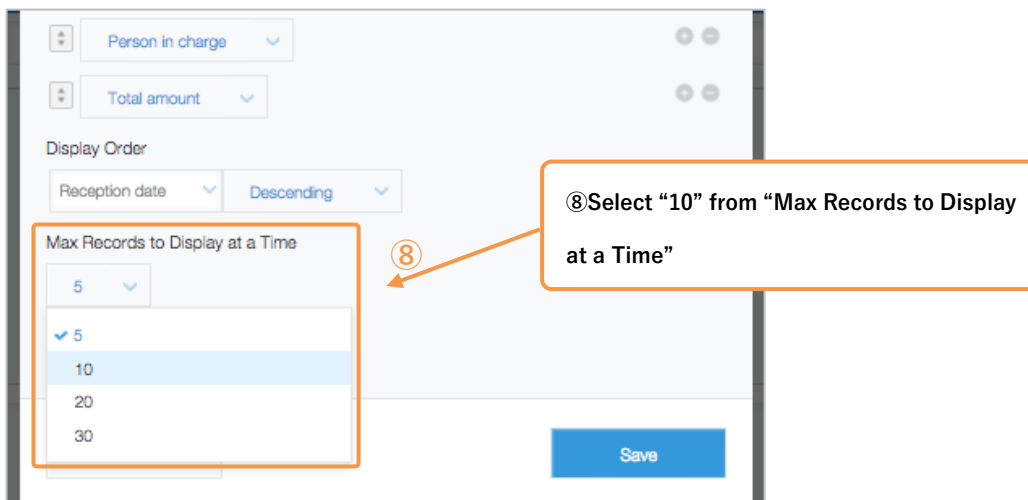
Field Code *: Related_Records_0

Cancel Save

⑦ Select “Reception date” and “Descending” from “Display Order”

⑧ Select the max records to displayed at a time

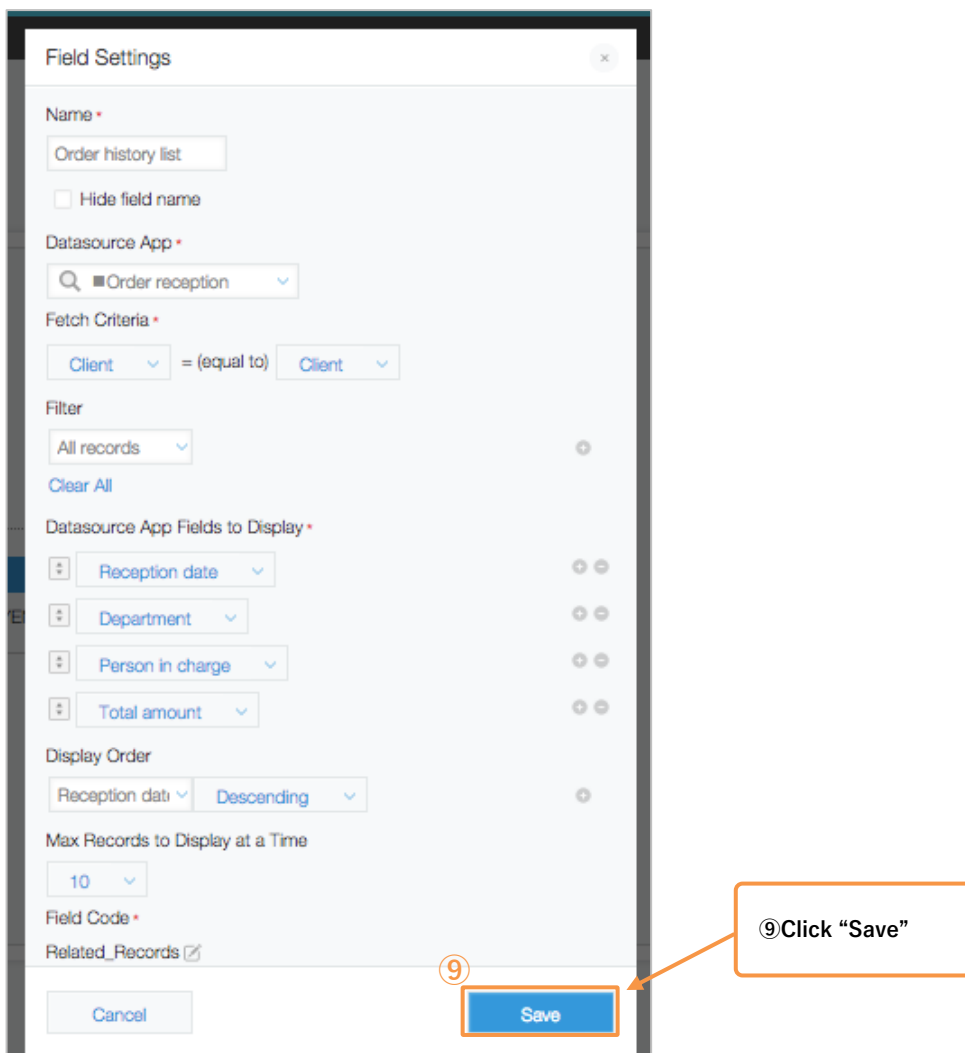
Here, we will designate the number of records displayed that meet the conditions. In this example, we will select “10.”



The screenshot shows a form with several dropdown menus. The 'Max Records to Display at a Time' dropdown is open, showing options 5, 10, 20, and 30. The option '10' is selected. An orange callout box with the number 8 in a circle points to the dropdown menu. The callout text reads: "⑧Select “10” from “Max Records to Display at a Time”".

⑨Save

Confirm the setting contents and click “Save”.



The screenshot shows the 'Field Settings' dialog box. The 'Name' field is 'Order history list'. The 'Datasource App' is 'Order reception'. The 'Fetch Criteria' is 'Client = (equal to) Client'. The 'Filter' is 'All records'. The 'Datasource App Fields to Display' are 'Reception date', 'Department', 'Person in charge', and 'Total amount'. The 'Display Order' is 'Reception date' and 'Descending'. The 'Max Records to Display at a Time' is '10'. The 'Field Code' is 'Related_Records' and is checked. The 'Save' button is highlighted with an orange box. An orange callout box with the number 9 in a circle points to the 'Save' button. The callout text reads: "⑨Click “Save”".

The “Related Records” field is complete!

Form Views Graphs App Settings

Save Form

Reception date: 2017-05-06 Receptionist: [User Icon]

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] YEN	[Text Box] YEN

Total amount: [Text Box] 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.

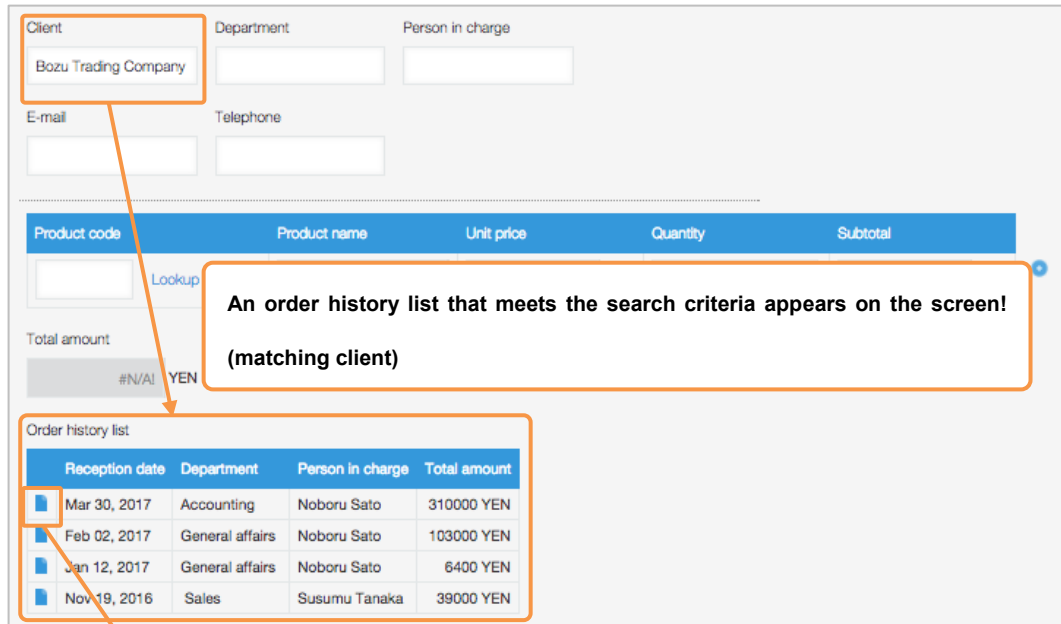
(Width will automatically be adjusted to match the number of characters.)



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】



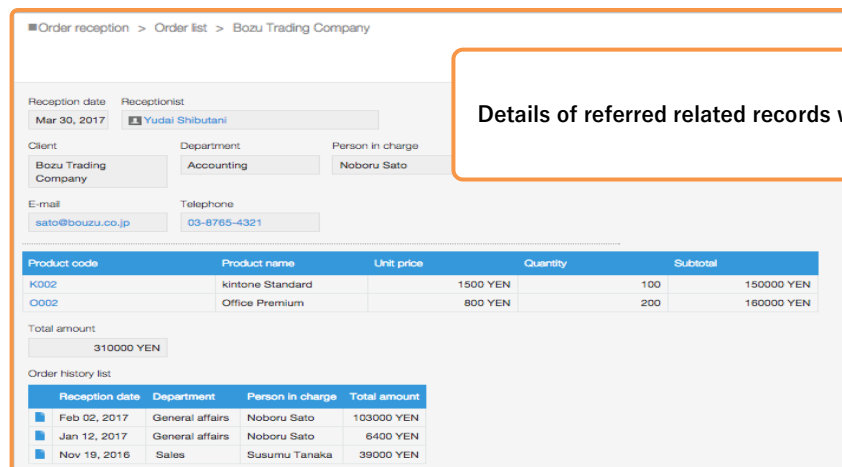
The record creation screen for Bozu Trading Company. It includes fields for Client, Department, Person in charge, E-mail, and Telephone. A table for product details is shown with columns for Product code, Product name, Unit price, Quantity, and Subtotal. A 'Total amount' field is also present. An orange box highlights the 'Client' field, and an arrow points from it to the 'Order history list' table below. A text box states: 'An order history list that meets the search criteria appears on the screen! (matching client)'.

Product code	Product name	Unit price	Quantity	Subtotal

Total amount: #N/A! YEN

Order history list

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



The details of referred related records for Bozu Trading Company. It shows the reception date, receptionist, client, department, and person in charge. A table for product details is shown with columns for Product code, Product name, Unit price, Quantity, and Subtotal. A 'Total amount' field is also present. An orange box highlights the 'Order history list' table below. A text box states: 'Details of referred related records will be shown'.

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: 03-8765-4321

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

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

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
** System Co.,Ltd.

Address
Nishino, Nishi-ku, Hokkaido, Japan

TEL
03-1234-5678

FAX
03-9876-5432

▼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
** System Co.,Ltd.

Address
Nishino, Nishi-ku, Hokkaido, Japan

TEL
03-1234-5678

FAX
03-9876-5432

Representative
Shinichi Sato

E-mail

Lead information

Person in charge
Yudai Shibutani

Frequency
B

Lead contents
Introduction of ▼▼ system options

Expected timing
Jun 27, 2017

Estimated amount
350,000 YEN

Order amount
320,000 YEN

Product	Model number
Product Sample H	H849
Product Sample D	D7782

Lead Management

Customer information

Client
** System Co.,Ltd.

Address
Nishino, Nishi-ku, Hokkaido, Japan

TEL
03-1234-5678

FAX
03-9876-5432

Representative
Shinichi Sato

E-mail

Lead information

Person in charge
Yudai Shibutani

Frequency
A

Lead contents
Introduction of ●● system

Expected timing
Jun 27, 2017

Estimated amount
1,300,000 YEN

Order amount
1,350,000 YEN

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

Customer number
A201

Client
Name

Inquiry section *
☒ Opinion ☐ Claim

Inquiry

Response · Answer

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 entering customer numbers when making a record, previous support history appears

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.

