



# 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	2,000,000	2,000,000	0	3,000,000
Emma	0	0	0	0	0	0	9,000,000

6:22 PM Jane Smith

### Notifications

All Unread Read

- 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.

### 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

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									
<div> <div>My Leads</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> <div>Records 1 - 20 of 24</div>									
	Lead Title	Status	Organization Name	Contact Name	Next Action Date	Next Action	Estimate Purchase	Estimate Total Sales	
	January First Lead	Customer	Sample A	Kyle	May 05, 2021		Jan 25, 2021	1,553,090	S
	Gym Entrance Renewal	New	Corporation Sample	Andrew	Apr 29, 2021	Send quotes...	Apr 25, 2021	8,389.99	S
	Website Renewal	Qualified	Company Example	John	Apr 26, 2021		Apr 26, 2021	13,587	S
	Academic License	Quote	Sample D	Kathleen	Apr 25, 2021		May 11, 2021	298,700	S
	NPO License	Negotiate	Corporation Sample	Andrew	Apr 25, 2021		May 11, 2021	98,700	S
	Website Renewal	New	Company Example	John	Apr 26, 2021		May 19, 2021	8,213,587	S
	New System Survey	New	Sample E	David	May 07, 2021		Jun 17, 2021	1,288,900	S
	Data Transfer	New	Sample B	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

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

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

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 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

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.)

7





**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](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 *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									
<div> <div>My Leads</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> <div>Records 1 - 20 of 24</div>									
	Lead Title	Status	Organization Name	Contact Name	Next Action Date	Next Action	Estimate Purchas	Estimate Total Sales	S
	January First Lead	Customer	Sample A	Kyle	May 05, 2021		Jan 25, 2021	1,553,090	S
2	Gym Entrance Renewal	New	Corporation Sample	Andrew	Apr 29, 2021	Send quotes...	Apr 25, 2021	8,389.99	S
	Website Renewal	Qualified	Company Example	John	Apr 26, 2021		Apr 26, 2021	13,587	S
	Academic License	Quote	Sample D	Kathleen	Apr 25, 2021		May 11, 2021	298,700	S
	NPO License	Negotiate	Corporation Sample	Andrew	Apr 25, 2021		May 11, 2021	98,700	S
	Website Renewal	New	Company Example	John	Apr 26, 2021		May 19, 2021	8,213,587	S
	New System Survey	New	Sample E	David	May 07, 2021		Jun 17, 2021	1,288,900	S
	Data Transfer	New	Sample B	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

Price

Quantity

Estimate Total Sales

Attachment

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.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

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.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

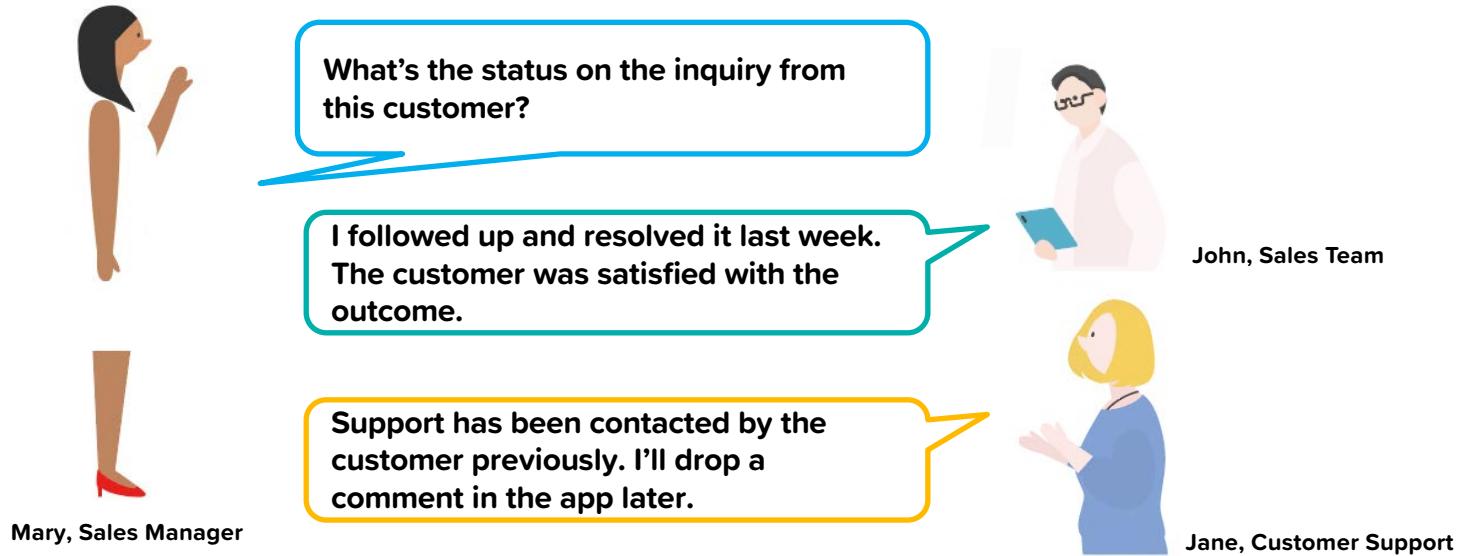
Restore Previous Version

Click "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.**

Sales Leads Management

App: Sales Leads Management

View: My Leads

Record: Website Renewal

Qualified Lead

End Pursuit


Change Assignee


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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

Mention



@Jane Smith

Hi, how is your progress?


Cancel



Post


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.


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 **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




Email

Telephone #



Write your comment here.

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


 1: [Mary](#) 1:45 AM  
[@Jane Smith](#)  
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









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
	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.






 Jane Smith






Search in App





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.

25




Jane Smith





Search in App



### 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










Search in App






Sales Leads Management








App: Sales Leads Management

My Leads

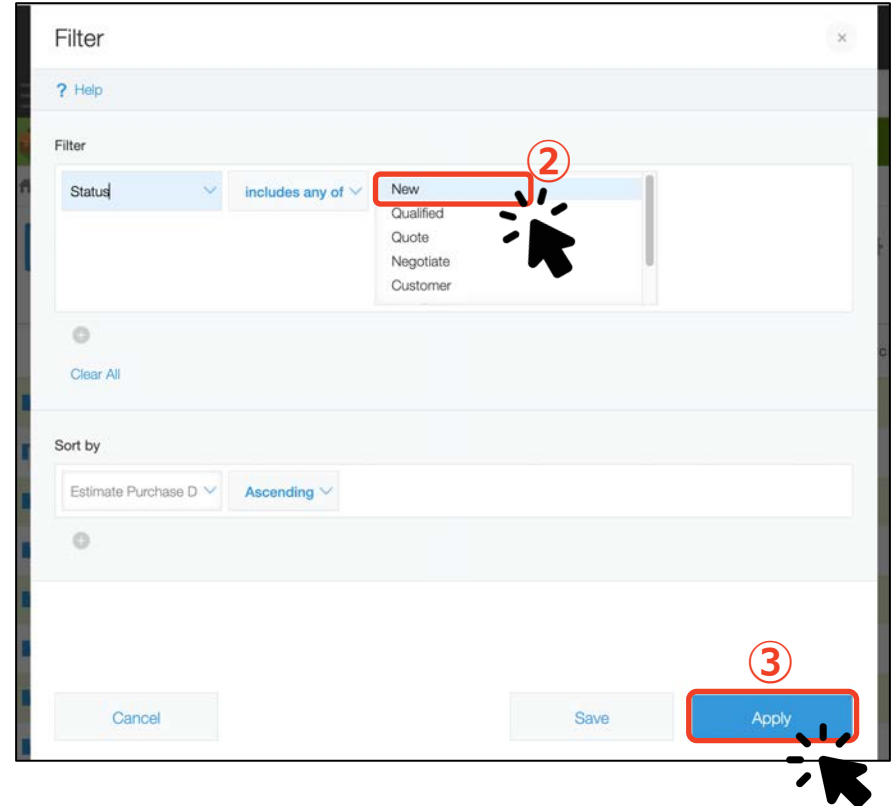
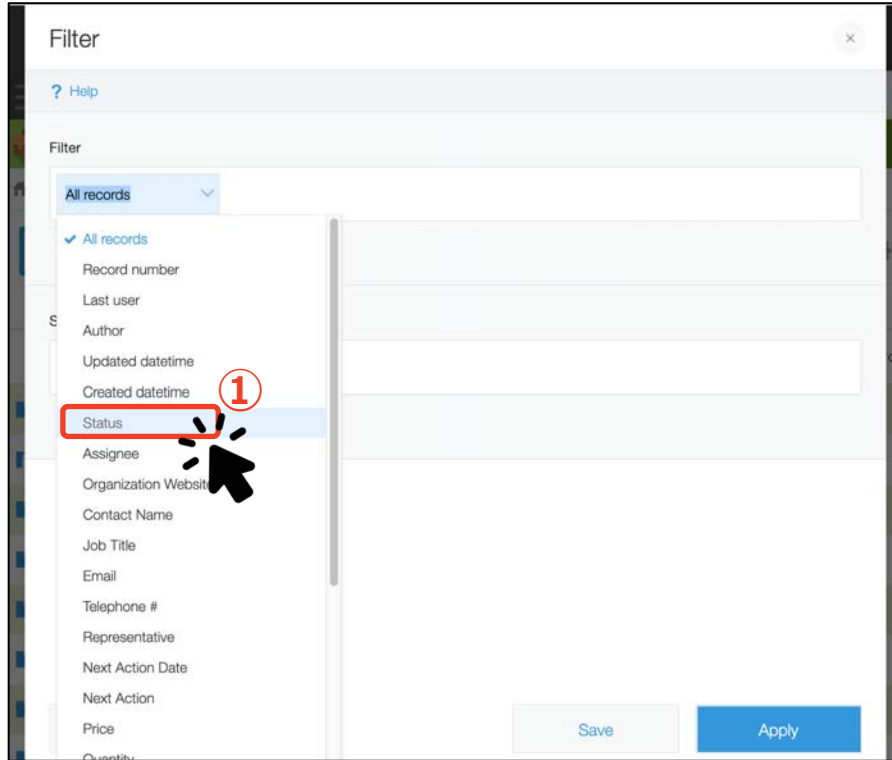




Records 1 - 20 of 25

	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
	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										
<div> <div>My Leads</div> <div></div> <div></div> <div></div> <div></div> </div> <div> <div></div> <div></div> <div></div> </div>										
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



























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

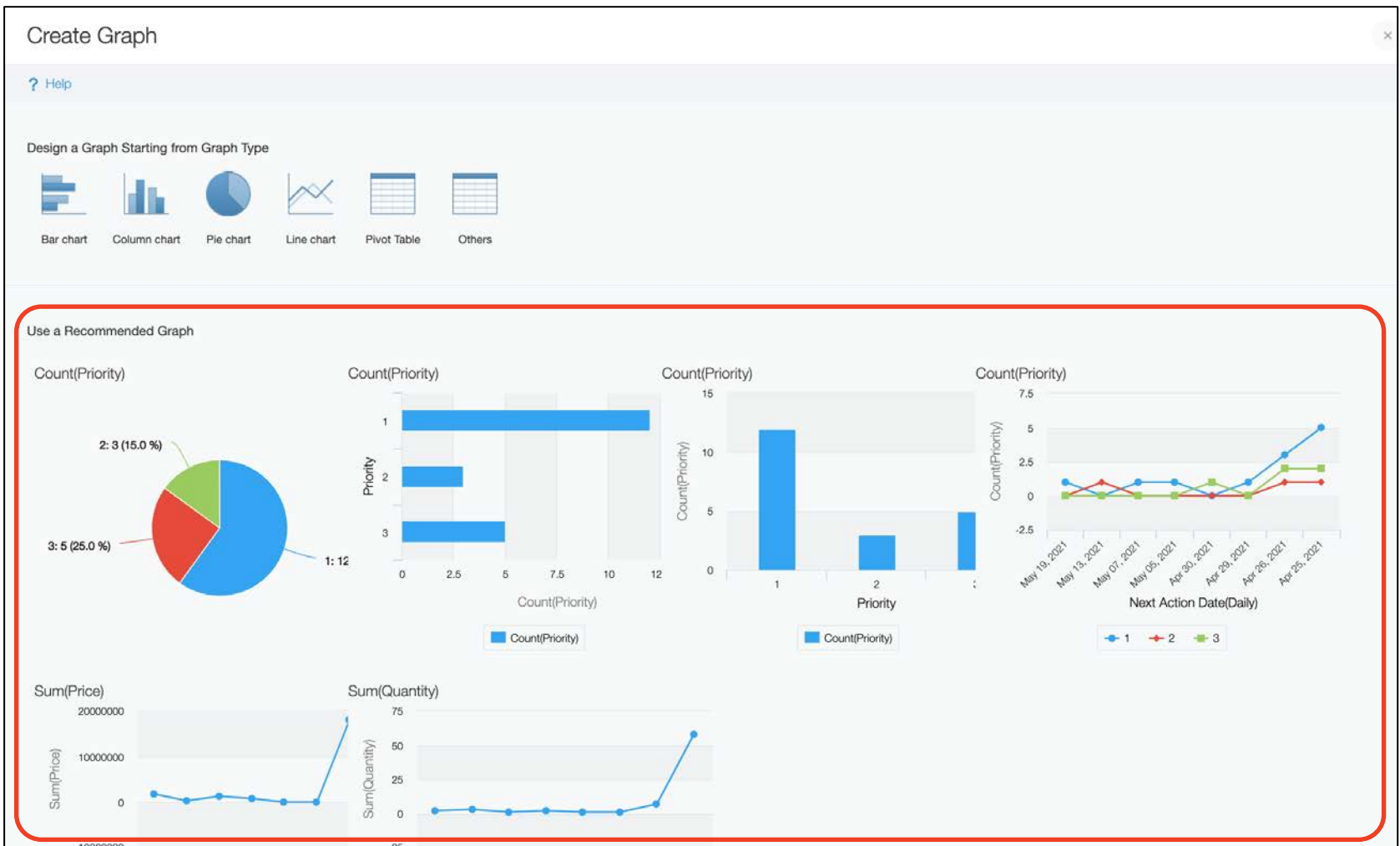
**When creating a graph, Kintone will automatically suggest recommended graphs based on the data in the app. With just a few clicks, you can also quickly fine-tune the conditions to be used to generate your graph.**

**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											
<div> <div>My Leads</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>											
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.





**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

Add

Function

Count

Filter

All records

Sort by

Total

Descending

Cancel

Back

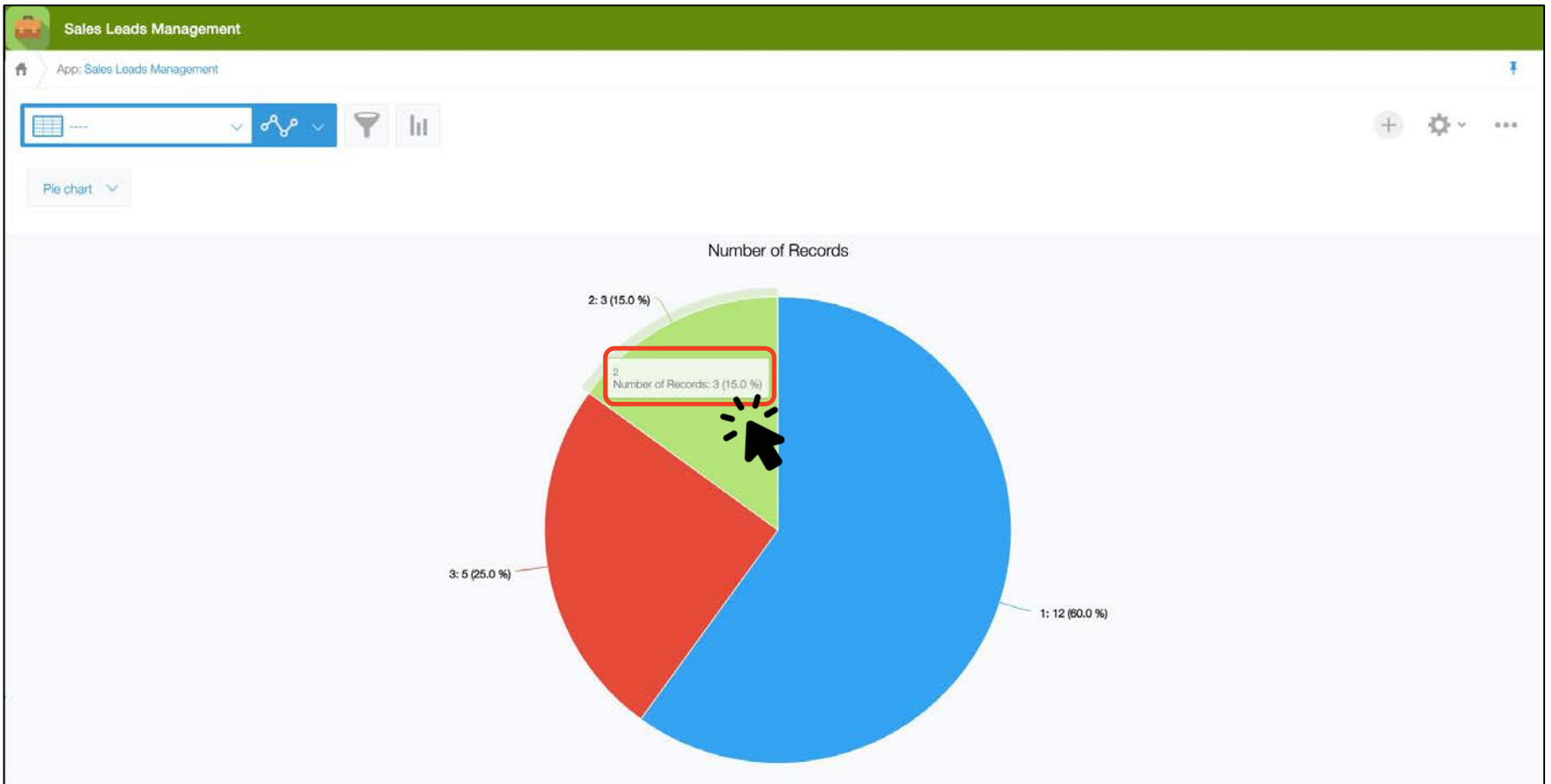
Save as New Graph

Apply







#### Preview

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

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



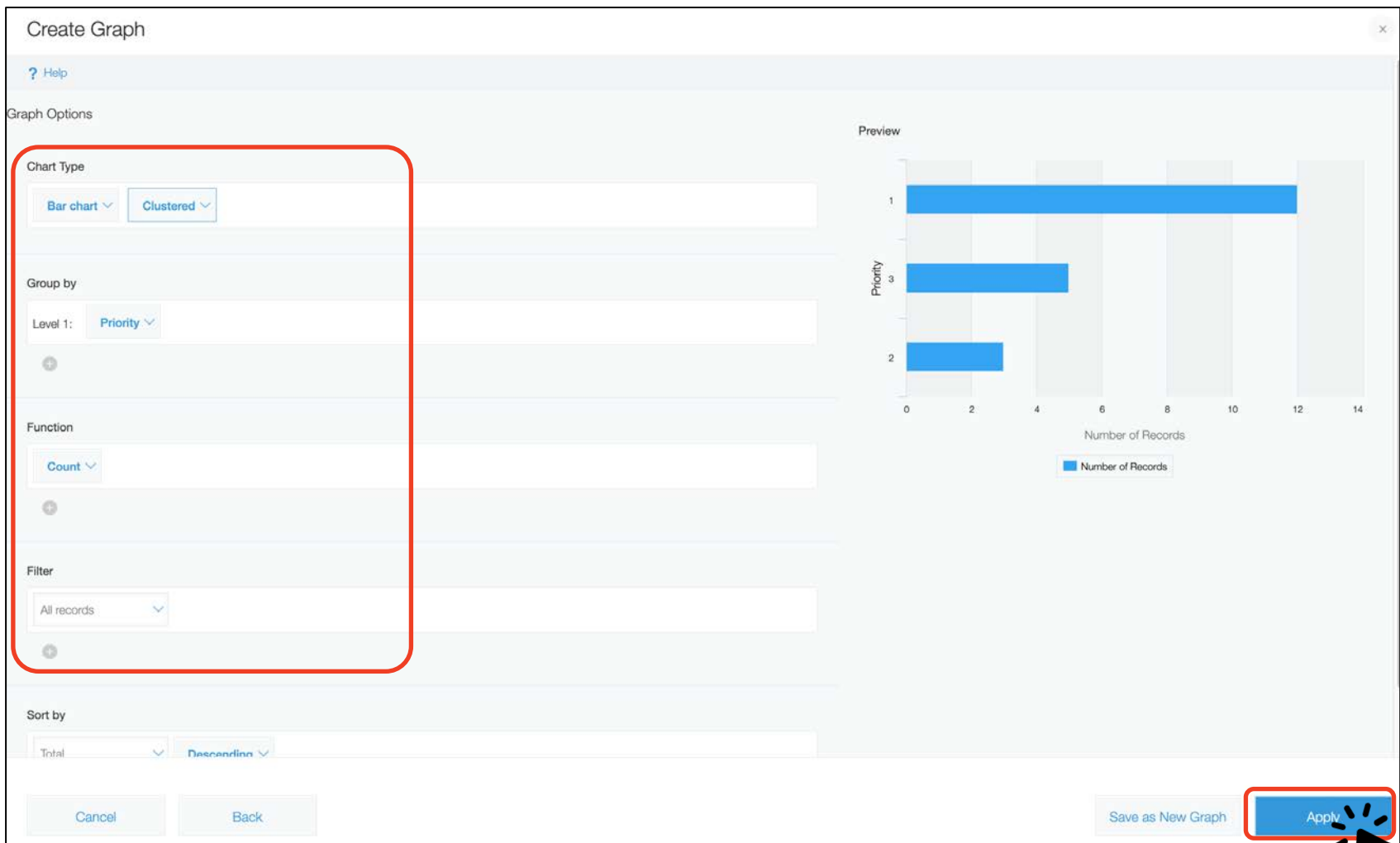
**Clicking a piece of the pie opens a list view page of all data entries corresponding to that graph section.**

Sales Leads Management											
App: Sales Leads Management											
<div> <div>My Leads</div> <div></div> <div></div> <div></div> <div></div> </div> <div> <div></div> <div></div> <div></div> </div>											
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.

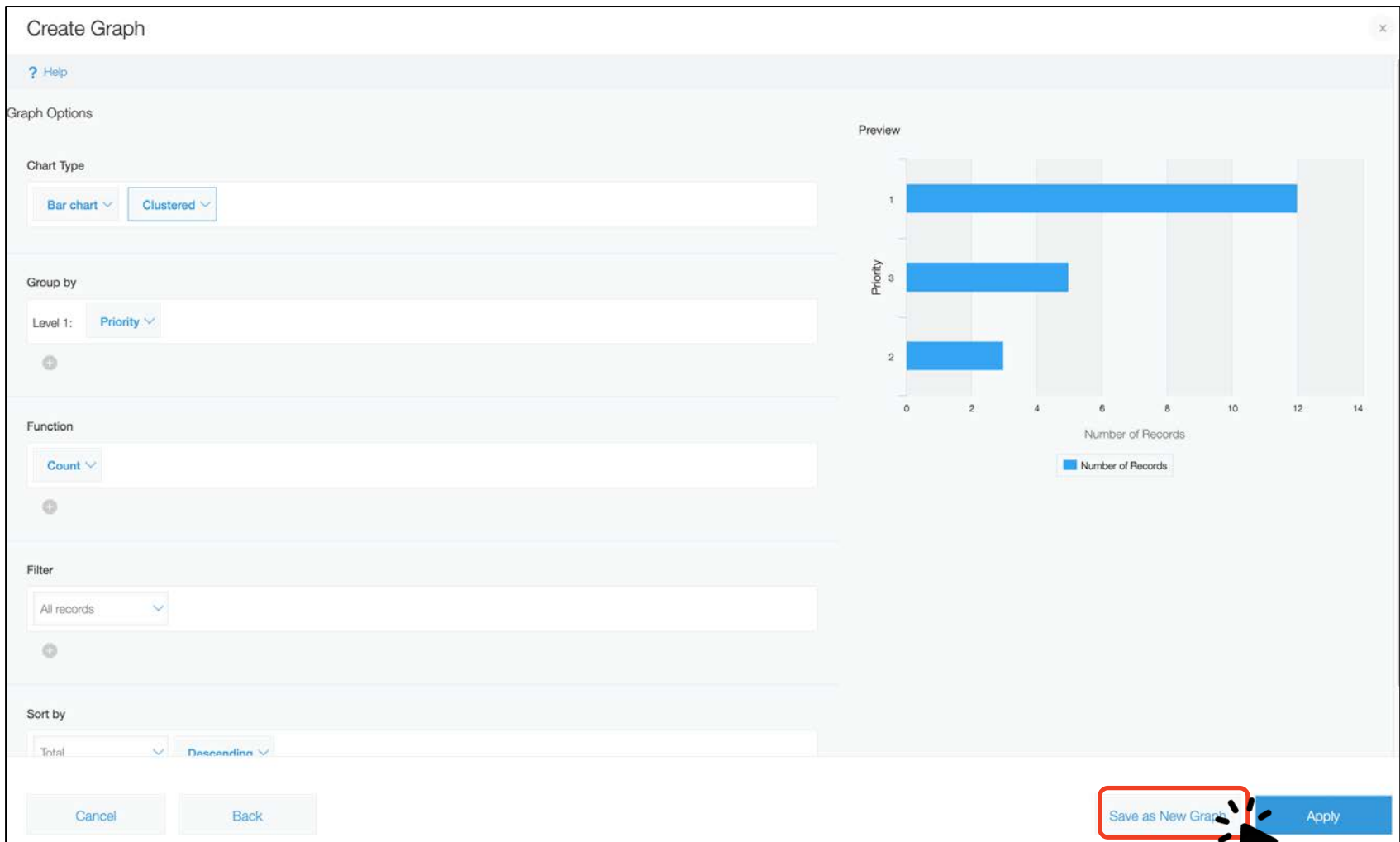
×

Others



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.







You can also retain the graph settings by clicking



Save as New Graph



(circled in red).



**Sales Leads Management**


 App: Sales Leads Management















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

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

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



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## 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	4,000,000	1,000,000	1,000,000	1,000,000	1,000,000	10,000,000	1,000,000	1,000,000	1,000,000
Mary	5,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Jane Smith	1,000,000	1,000,000	8,000,000	1,000,000	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	1,000,000	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	1,000,000	1,000,000	1,000,000

### 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 Graphs and Views into the Space.**

**Create message boards for specific topics.**

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.

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	1,000,000	0	0	3,000,000	3,000,000	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	0	8,000,000

Mar 2 6:22 PM Jane Smith

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

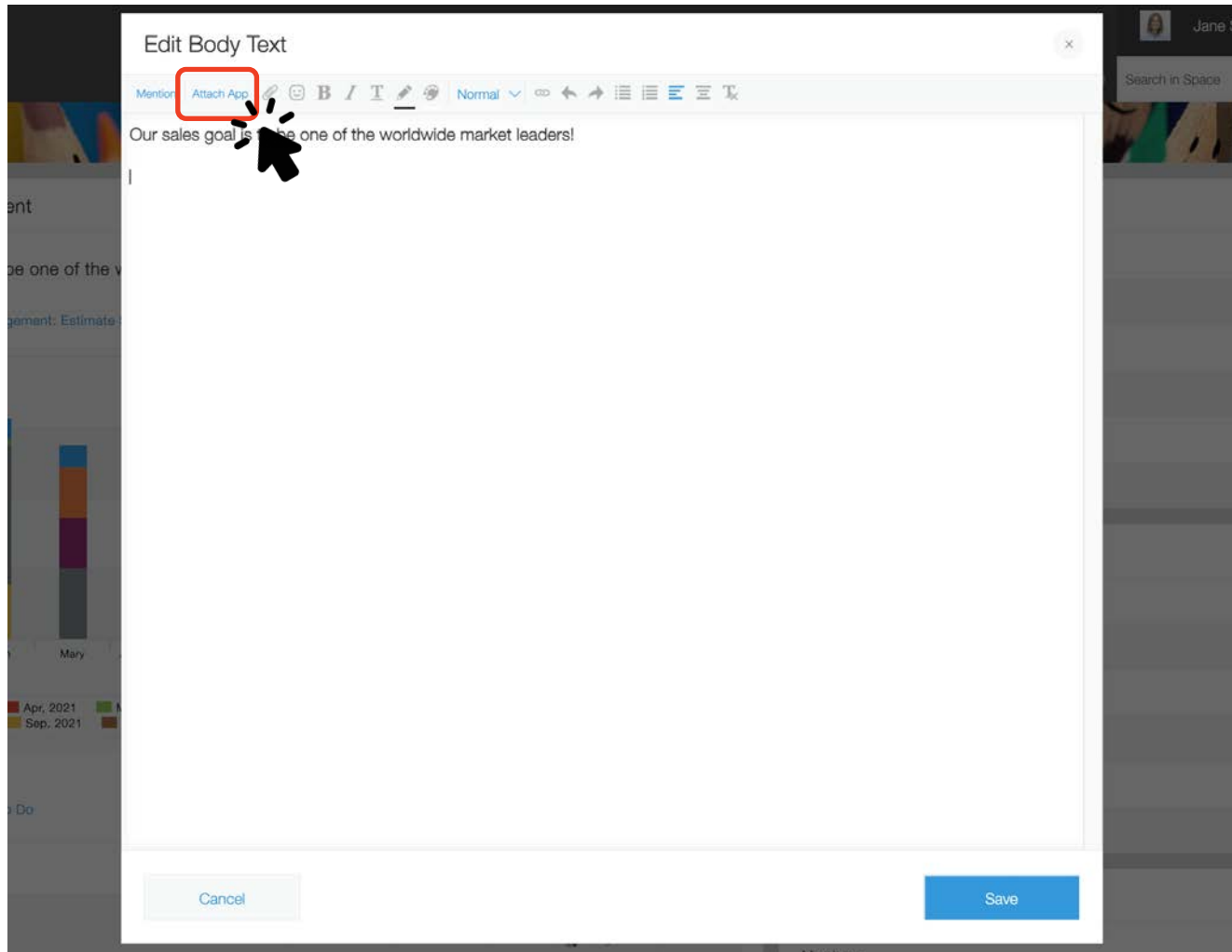
Product Database

Notifications

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

44





**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

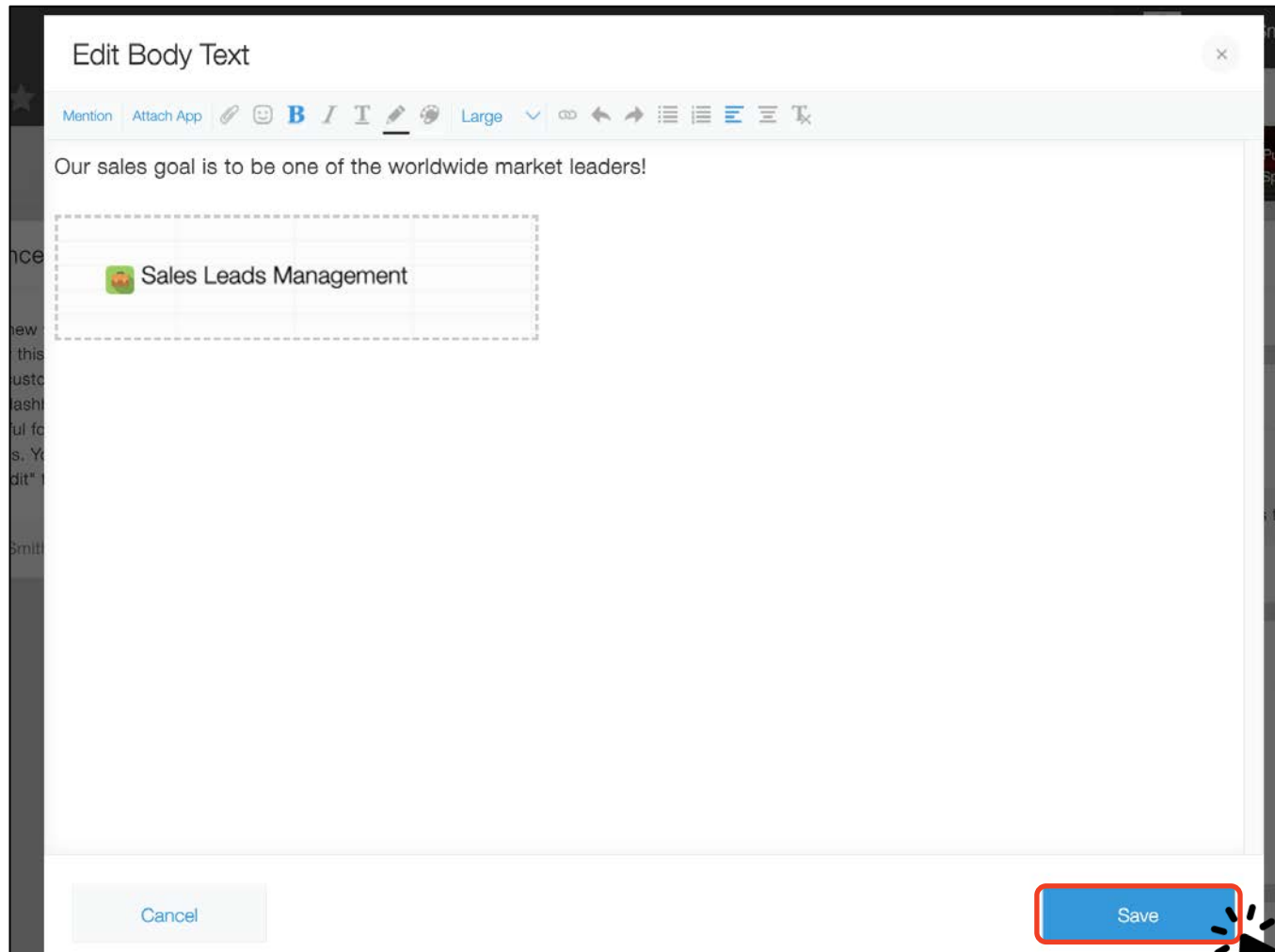
Sales Leads Management: All Leads

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 OK.**



Click  to save what you have placed.



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...	Sample D	Marketing	David	Jul 27, 2021	
	Data Tr...	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 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.**