

Ragic Database Design 101

START!

Ragic!



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Click on title to jump to a chapter

Introduction



Introduction 1

A complete database can contain all kinds of business applications.

The screenshot displays the Ragic! web application dashboard. At the top, there is a search bar and navigation links for 'Rex Home', 'Learn Ragic', and 'Need Help?'. Below this is a horizontal menu with categories: Start, Administration, Marketing, Project Budget ..., Project Manage..., Sales, Support, and Event Coordina... On the left side, there is a sidebar with 'Most Visited' links (Home, Account Setup, Install Templates, Learn Ragic, Company Setting, User) and 'Recent Items' (jeff.kuo@gmail.com, amy@ragic.com, angie@ragic.com). The main content area is divided into several sections:

- Administration** (represented by a building icon):
 - Phone Book
 - Bulletin board
 - Expense Report
 - Asset Management
 - Equipment
 - Equipment Checkout
 - Maintenance Request
 - Maintenance Assignment
 - Office Supplies - Stock
 - Office Supplies - Request Form
 - Office Supplies - Purchase Order
- Marketing** (represented by a speaker icon):
 - Lead Management
- Project Budget and Expense** (represented by a pencil icon):
 - Projects
- Sales Order Management** (represented by a bar chart icon):
 - Sales Order
 - Delivery Note
 - Accounts
 - Products (SO)
 - Product Price List
- Inventory Management** (represented by a pencil icon):
 - Locations
 - Inventory
 - Location Balance
 - Outgoing Stock
 - Incoming Stock
 - Inventory Transfer
 - Bill of Materials (BOM)
- Purchasing** (represented by a building icon):
 - Vendors

On the right side, there are three widget boxes:

- Tasks**: Shows 'You have no tasks in progress.'
- Events**: Shows '3/5 Mon' and details for 'Purchase Requisition Expected Arrival Date: PR-20180205-001' and 'Purchase Order PR Expected Date: PO-20180205-001', with a 'Show calendar' link.
- Getting Started**: Contains links for 'Install Templates', 'Learn Ragic', 'Introducing Ragic to your team', 'Account Setup', and 'Ragic Blog'.

At the bottom right, there is a red 'Support Chat' button with 'Powered by Ragic Bot' and 'Beta' text.

Introduction 2

The screenshot shows the Ragic! web application interface. At the top left is the Ragic! logo. Below it is a navigation bar with three tabs: Start, Administration, and Marketing. The Administration tab is highlighted with a red box and labeled '1 Tab' with a red arrow. Below the navigation bar is a sidebar on the left with sections for 'Most Visited' and 'Recent Items'. The 'Most Visited' section includes links for Home, Account Setup, Install Templates, Learn Ragic, Company Setting, and User. The 'Recent Items' section lists three email addresses: jeff.kuo@gmail.com, amy@ragic.com, and angie@ragic.com. The main content area displays the Administration menu, which is also highlighted with a red box and labeled '2 Sheets' with a red arrow. The Administration menu includes a list of items: Phone Book, Bulletin board, Expense Report, Asset Management, Equipment, Equipment Checkout, Maintenance Request, Maintenance Assignment, Office Supplies - Stock, Office Supplies - Request Form, and Office Supplies - Purchase Order.

Ragic!

Start Administration Marketing

Most Visited

- Home
- Account Setup
- Install Templates
- Learn Ragic
- Company Setting
- User

Recent Items

- jeff.kuo@gmail.com
- amy@ragic.com
- angie@ragic.com

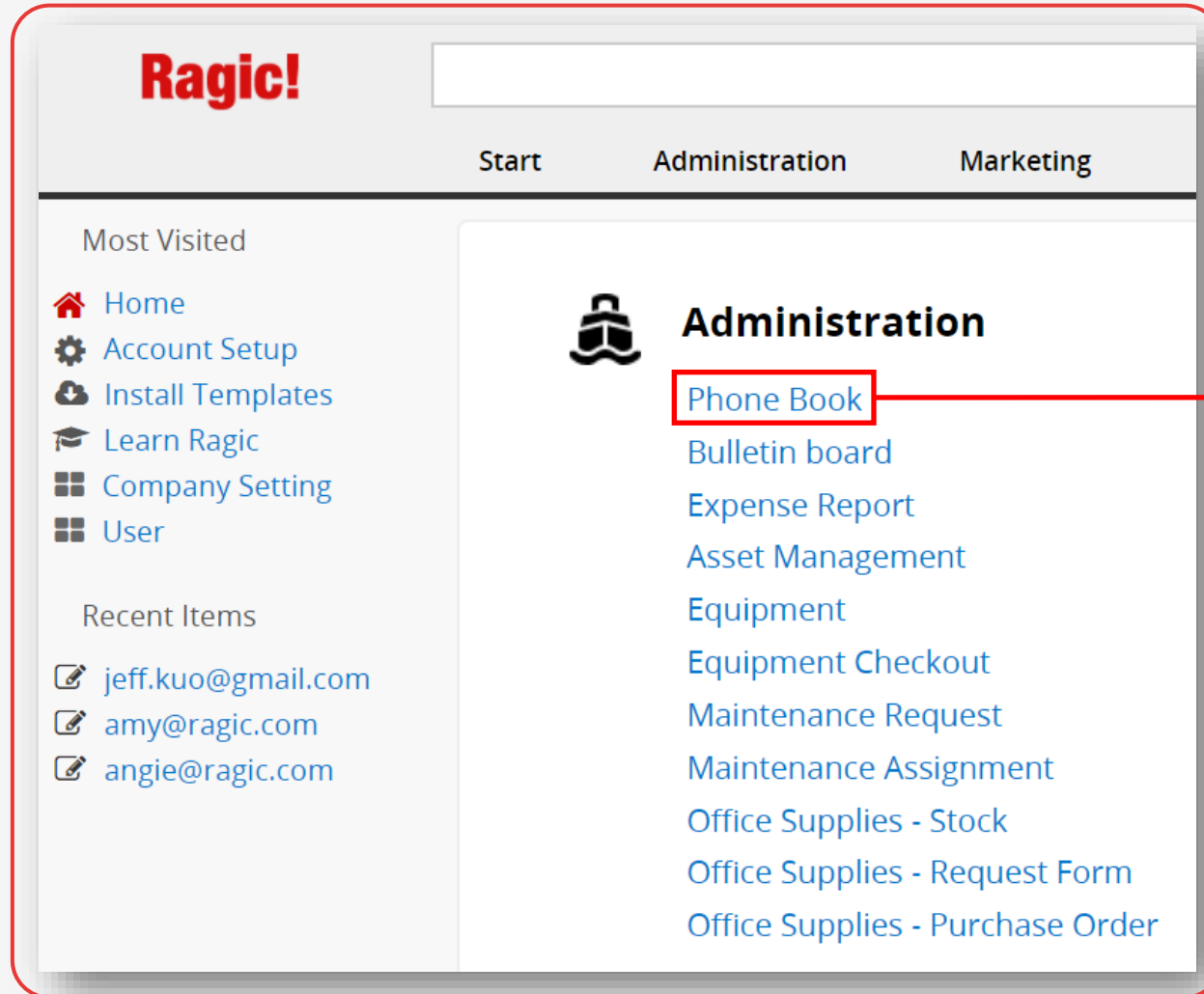
Administration

- Phone Book
- Bulletin board
- Expense Report
- Asset Management
- Equipment
- Equipment Checkout
- Maintenance Request
- Maintenance Assignment
- Office Supplies - Stock
- Office Supplies - Request Form
- Office Supplies - Purchase Order

1 Tab

2 Sheets

Introduction 3




1


Click on a sheet to access records

Introduction 4

The "Listing Page" is a table that contains the summary of many entries.

Phone Book 

*Full Name	Department	Office Phone	Extension	Email
+ Rex Haller	Marketing	+18-886-668037	18	rex@ragic.com
Jeff Kuo	Executive	+18-886-668037	10	jeff@ragic.com
Sophia Hampton	Sales	+18-886-668037	11	sophia@ragic.com
Willie Chien	Finance	+18-886-668037	38	willie@ragic.com

 Calculate total for all currently filtered records

1


Click to see the details of this entry

Introduction 5

The "Form Page" is the full detail of a single entry as a page.

Phone Book

Basic Info

*Full Name	Rex Haller			
Employee ID	R0130	User Account	Rex	

Contact Info

Department	Marketing	Job Status	Confirmed
Mobile		E-mail	rex@ragic.com
Office Phone	+18-886-668037	Extension	18

1

Field



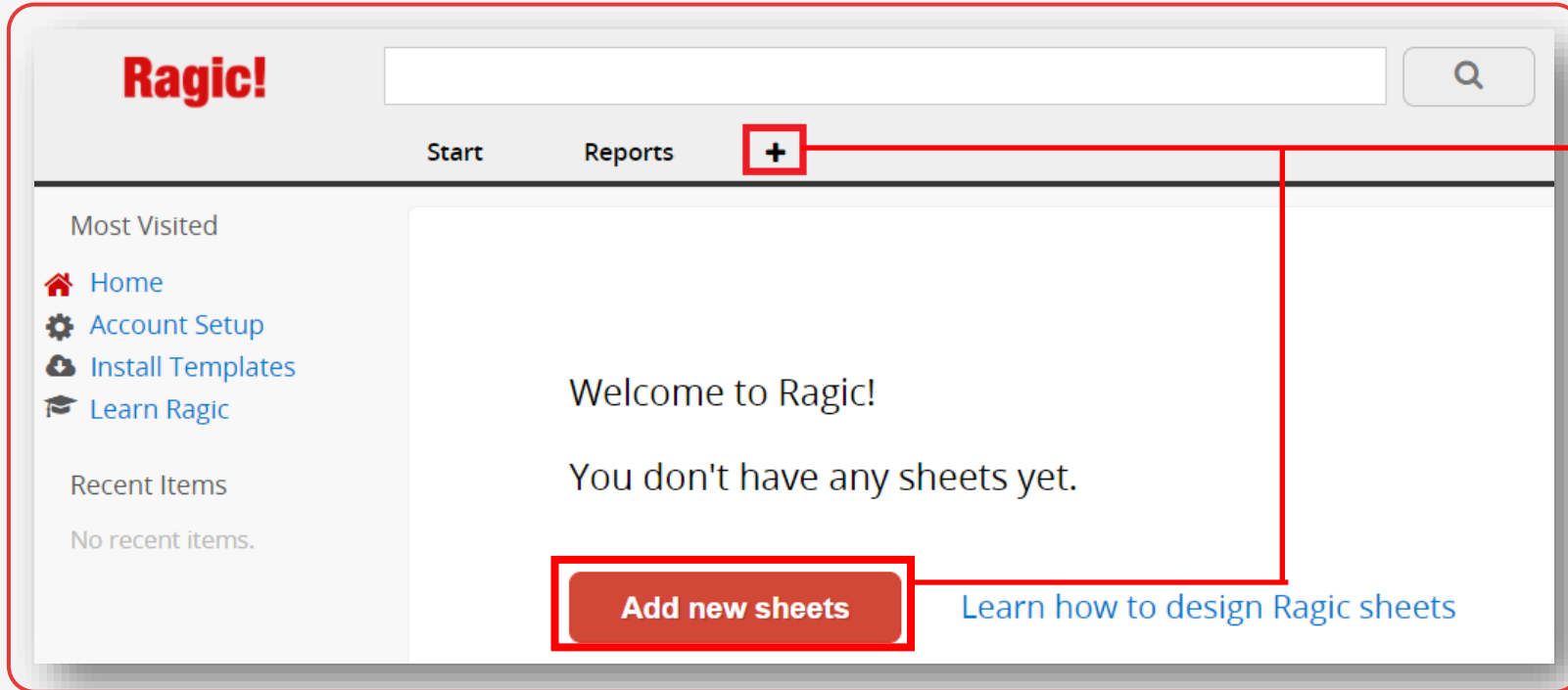
Designing your Ragic application



Get the hang of Ragic

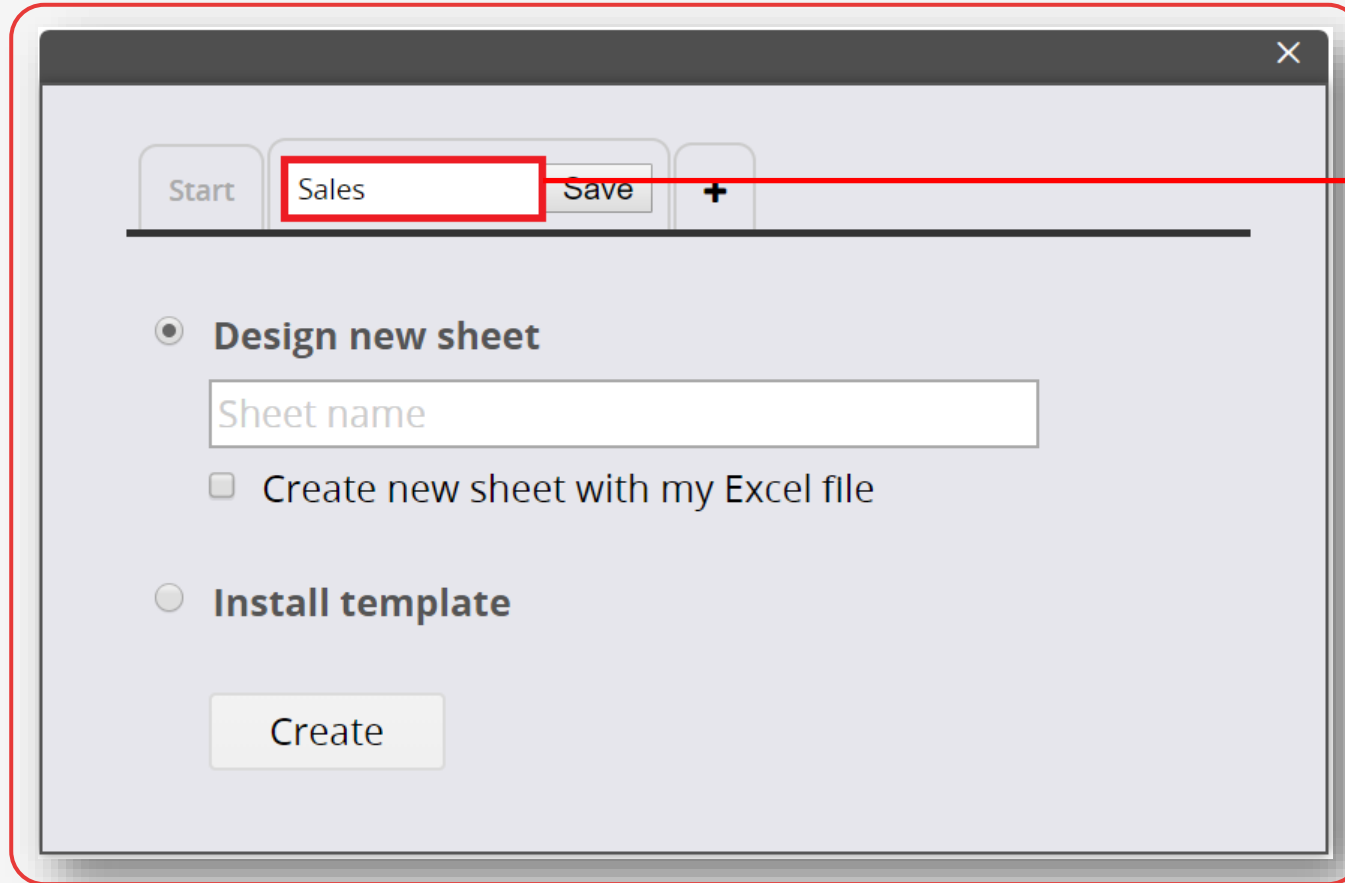
Design application 1 – Create sheet

Design your own sheet



1 Create new tab and sheet

Design application 2 – Create sheet



1 Name your tab

Design application 3 – Create sheet

Start Sales +

Design new sheet

Sales Order

Create new sheet with my Excel file

Install template

Create

1 Name your sheet

Design application 4 – Create fields

The screenshot shows the Ragic! application interface. At the top, there is a search bar and navigation tabs for 'Start', 'Sales', and 'Reports'. Below this, there are tabs for 'Add Components', 'Field Settings', and 'Form Settings'. The main workspace is titled 'Sales Order' and contains a grid with columns A, B, C, and D, and rows 1 through 8. A red box highlights the first cell of the grid (row 1, column A). A red arrow points from the right side of the image to this cell.

1 Type the field name that you would like to create

Design application 5 – Create fields

Field Settings

Field Name (?)
Order Number

Field Type (?)
Auto Generate

Example
00032

Formatting(?)
{0,number,00000}

	A	B
1	Order Number	Auto Generate
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		

1 Field Type

2 Field Name

3 Field Value

Design application 6 – Create fields

1 Field Description

2 Fields

The screenshot shows a form design application interface. On the left, there are tabs for 'Add Components', 'Field Settings', and 'Form Settings'. Below these are sections for 'Static Text' and 'Fields'. The 'Static Text' section has three 'Description' buttons. The 'Fields' section has buttons for 'Free Text', 'Selection', 'Multiple Select', 'Select from other Sheet', 'File Upload', 'Image Upload', 'Select User', and 'Select Group'. The main area shows a 'Sales Order' form with a table of fields. The table has columns A, B, C, D, and E. The table is titled 'Order Information' and contains the following data:

Order Information				
Customer ID	Free Text	Sales Order No.	Auto Generate	
Customer Name	Free Text	Sales Order Date	2018/03/05	
Phone	Phone	Shipping Date	yyyy/MM/dd	📅
Mobile	Phone	Ship Via	Selection	▼
E-mail	E-mail	Tracking No.	Free Text	
Billing Address	Address			
Shipping Address	Address			

Design application 7 – Create fields

Default Value

The screenshot shows the configuration interface for a field named "Sales Order Date". The "Field Type" is set to "Date". The "Default Value" is set to "\$DATE". A dropdown menu is open, showing various date and time formatting options. The first option, "Create date (2018/03/05)", is highlighted.

Field Name (?)	Sales Order Date
Field Type (?)	Date
Default Value: (?)	\$DATE
Populate empty values	<ul style="list-style-type: none">Create date (2018/03/05)Create time (15:32:57)Create date time (2018/03/05 15:32:57)Create year (2018)Create month (3)Last modified date (2018/03/05)Last modified time (15:32:57)Last modified date time (2018/03/05 15:32:57)Last modified year (2018)Last modified month (3)

The screenshot shows a table titled "Order Information" with the following data:

Order Information			
Customer ID	Free Text	Sales Order No.	Auto Generate
Customer Name	Free Text	Sales Order Date	2018/03/05
Phone	Phone	Shipping Date	yyyy/MM/dd
Mobile	Phone	Ship Via	Selection
E-mail	E-mail	Tracking No.	Free Text
Billing Address	Address		
Shipping Address	Address		

1 Set up Default Value

2 Format

3 Fill out this field

Design application 8 – Subtable

Handling one-to-many relationships

	A	B	C	D	E
1	Order Information				
2	Customer ID	Free Text	Sales Order No.	Auto Generate	
3	Customer Name	Free Text	Sales Order Date	2018/03/05	
4	Phone	Phone	Shipping Date	yyyy/MM/dd	📅
5	Mobile	Phone	Ship Via	Selection	▼
6	E-mail	E-mail	Tracking No.	Free Text	
7	Billing Address	Address			
8	Shipping Address	Address			
9					
10					
11	Sales Information				
12	Product ID	Product Name	Unit Price	Qty	Subtotal <small>fx0</small>
13	Free Text	Free Text	#,###.#####	#,###	#,###.#####
14	Free Text	Free Text	#,###.#####	#,###	#,###.#####
15	Free Text	Free Text	#,###.#####	#,###	#,###.#####

1 Subtable

Design application 9 – Formula

Applying a formula

The screenshot shows a software interface with a 'Formula' dialog box on the left and a table on the right. The dialog box has tabs for 'Validation', 'Other', 'Basic', 'Formula', and 'Styles'. The 'Formula' tab is active, and the 'Formula(?)' field contains the text 'C12*D12'. Below this field, it says 'No need to start with "="'. There are two buttons: 'Apply this formula to all saved records' and 'Apply all formulas on this sheet to all saved records'. The table on the right has columns A through E. Row 11 is a header row for 'Sales Information'. Row 12 has headers: 'Product ID' (A), 'Product Name' (B), 'Unit Price' (C), 'Qty' (D), and 'Subtotal' (E). The 'Subtotal' cell in row 12 has a small 'fx()' icon. Rows 13-15 contain 'Free Text' in columns A and B, and currency values in columns C, D, and E. Rows 16-19 contain 'Total', 'Tax Rate', 'Tax', and 'Amount Due' in column D, with corresponding values in columns E. The 'fx()' icon is also present in the 'Total', 'Tax', and 'Amount Due' cells.

1 Set up Formula

2 Assign to Field Header

Design application 10 – Approval

Setting up approval flow

Sales Order

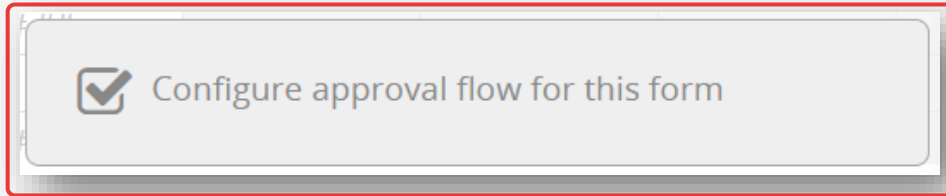
Optional description of your form

A	B	C	D	E	F
Order Information					
Customer ID	Free Text	Sales Order No.	Auto Generate		
Customer Name	Free Text	Sales Order Date	2018/03/05		
Phone	Phone	Shipping Date	yyyy/MM/dd		
Mobile	Phone	Ship Via	Selection	▼	
E-mail	E-mail	Tracking No.	Free Text		
Billing Address	Address				
Shipping Address	Address				
Sales Information					
Product ID	Product Name	Unit Price	Qty	Subtotal	
Free Text	Free Text	#,###.#####	#,###	\$#,###.#####	
Free Text	Free Text	#,###.#####	#,###	\$#,###.#####	
Free Text	Free Text	#,###.#####	#,###	\$#,###.#####	



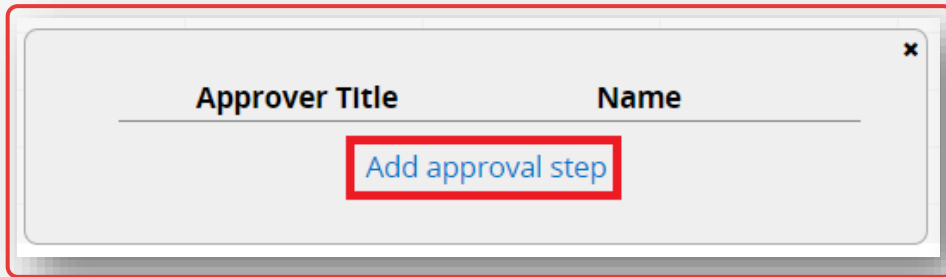
1 → Configure approval flow

Design application 11 – Approval



Configure approval flow for this form

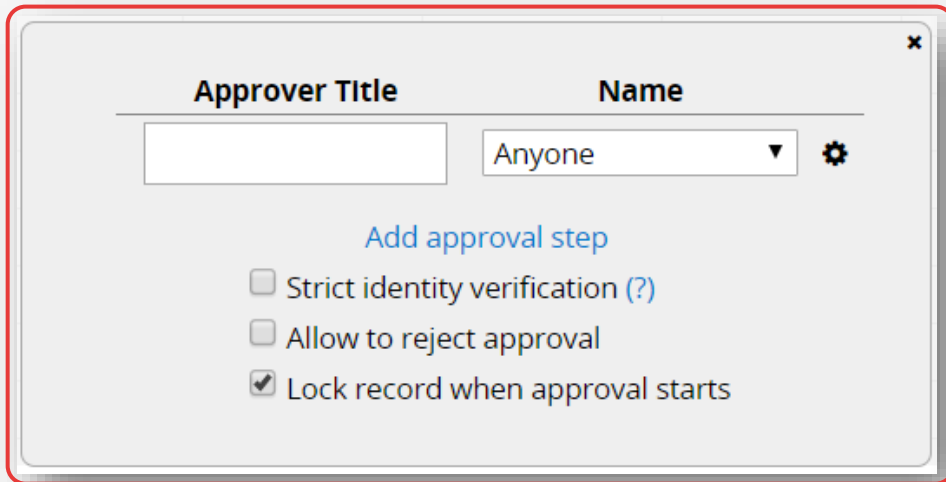
1 Click to configure




Approver Title Name

[Add approval step](#)

2 Add approval step



Approver Title Name

[Add approval step](#)

- Strict identity verification (?)
- Allow to reject approval
- Lock record when approval starts

3 Set the approver

Design application 12 – Approval

The image shows a software interface for designing an approval process. A red-bordered window contains a grid area and a configuration panel. The configuration panel includes an "Approver Title" field, a dropdown menu for selecting an approver, and several checkboxes for approval settings. Two red arrows with numbers point to specific elements: arrow 1 points to the "Approver Title" field, and arrow 2 points to the dropdown menu.

1 Approver Title

2 Select Approver

Approver Title

Group

- Anyone
- EVERYONE
- User
- X-User
- Management
- HR
- Accounting
- Sales
- IT
- SYSAdmin

users

- cloud
- rex@ragic.com

Company Organize Tree

- Direct Supervisor
- Supervisor of Supervisor

Anyone

Add approval step

- Strict identity verification (?)
- Allow to reject approval
- Lock record when approval starts

Design application 13 – Approval

Done!

The screenshot shows a configuration window for approval steps. It features a table with two columns: 'Approver Title' and 'Name'. The first row lists 'Supervisor' and 'Direct Supervisor', while the second row lists 'Sales Manager' and 'Management'. Each row includes a gear icon for settings. Below the table, there is a link to 'Add approval step' and three checkboxes: 'Strict identity verification (?)', 'Allow to reject approval', and 'Lock record when approval starts' (which is checked).

Approver Title	Name
Supervisor	Direct Supervisor
Sales Manager	Management

[Add approval step](#)

- Strict identity verification (?)
- Allow to reject approval
- Lock record when approval starts

Design application 14

1

Remember to save before leaving "Design Mode"

Save Exit Form Tools Editing Descriptions

Sales Order

Optional description of your form

A	B	C	D	E
Order Information				
Customer ID	Free Text	Sales Order No.	Auto Generate	
Customer Name	Free Text	Sales Order Date	2018/03/05	
Phone	Phone	Shipping Date	yyyy/MM/dd	
Mobile	Phone	Ship Via	Selection	
E-mail	E-mail	Tracking No.	Free Text	

Design application 15 – Adding an entry

Save Cancel

New Sales Order

Order Information			
Customer ID	<input type="text"/>	Sales Order No.	SO-20180305-001
Customer Name		Sales Order Date	2018/03/05
Phone		Shipping Date	
Mobile		Ship Via	
E-mail		Tracking No.	
Billing Address			
Shipping Address			

Sales Information						
Product ID		Product Name		Unit Price	Qty	Subtotal

1 Input Data

2 Default Value

Design application 16 – Adding an entry

Form page

1 Back to listing page

Sales Order

Order Information			
Customer ID	C-00001	Sales Order No.	SO-20180305-001
Customer Name	Rex Haller	Sales Order Date	2018/03/05
Phone	+1-888-666-8037	Shipping Date	2018/03/07
Mobile		Ship Via	Express Shipping
E-mail	rex@ragic.com	Tracking No.	3038129541440097
Billing Address	601 Sherwood Ave. San Bernardino, CA 92404		
Shipping Address	601 Sherwood Ave. San Bernardino, CA 92404		

Sales Information					
Product ID	Product Name	Unit Price	Qty	Subtotal	
P-00001	Apple Pie	\$12	3	\$36	
P-00002	Cup Cake	\$3	5	\$15	
P-00003	Brownie	\$5	1	\$5	
				Total	\$56
				Tax Rate	5.00%

Approval

Approver Title	Name
Supervisor	▼
Sales Manager	▼

Start approval

2 Approval

Design application 17 – Adding an entry

Listing page

Sales Order

Customer ID	<input type="checkbox"/> Sales Order No.	<input type="checkbox"/> Customer Name	<input type="checkbox"/> Sales Order Date	<input type="checkbox"/> Phone	<input type="checkbox"/> Shipping Date
+ C-00003	SO-20180306-002	Charles Wang	2018/03/16	+1-888-666-8037	2018/03/22
C-00002	SO-20180306-001	Sophia Hampton	2018/03/06	+1-888-666-8037	2018/03/07
C-00001	SO-20180305-001	Rex Haller	2018/03/05	+1-888-666-8037	2018/03/07

 Calculate total for all records

Design application 18 – Listing page

Fields Displayed on the Listing Page

- 1 Click on “Change Design” on listing page

The screenshot shows a web application interface for a Sales Order listing. The header includes a '+New' button, a 'Tools' dropdown, and a refresh icon. On the right side of the header, there is a '1 - 3 of 3' indicator, a 'Reports' button, and a 'Change Design' button which is highlighted with a red border and a red arrow pointing to it from the instruction above. Below the header, the title 'Sales Order' is displayed. A table follows with columns for Customer ID, Sales Order No., Customer Name, Sales Order Date, Phone, and Shipping Date. Two rows of data are shown:

Customer ID	Sales Order No.	Customer Name	Sales Order Date	Phone	Shipping Date
C-00003	SO-20180306-002	Charles Wang	2018/03/16	+1-888-666-8037	2018/03/22
C-00002	SO-20180306-001	Sophia Hampton	2018/03/06	+1-888-666-8037	2018/03/07

Design application 19 – Listing page

Sales Order

Optional description of your form

	A	B	C	D	E	F
1	Customer ID	Sales Order No.	Customer Name	Sales Order Date	Phone	Shipping Date
2	Free Text	Auto Generate	Free Text	2018/03/06	Phone	www/MM/dd
3	Free Text	Auto Generate	Free Text	2018/03/06	Phone	MM/dd
4	Free Text	Auto Generate	Free Text	2018/03/06	Phone	MM/dd
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						

Listing Page Field Picker

Available Fields

- Ship Via
- Tracking No.
- Billing Address
- Shipping Address
- Tax Rate
- Tax
- Note
- Approval
- Next Signer

Selected Fields

- Customer ID
- Sales Order No.
- Customer Name
- Sales Order Date
- Phone
- Shipping Date
- Mobile
- E-mail
- Total
- Amount Due

1 Choose the fields that will be displayed in the listing page



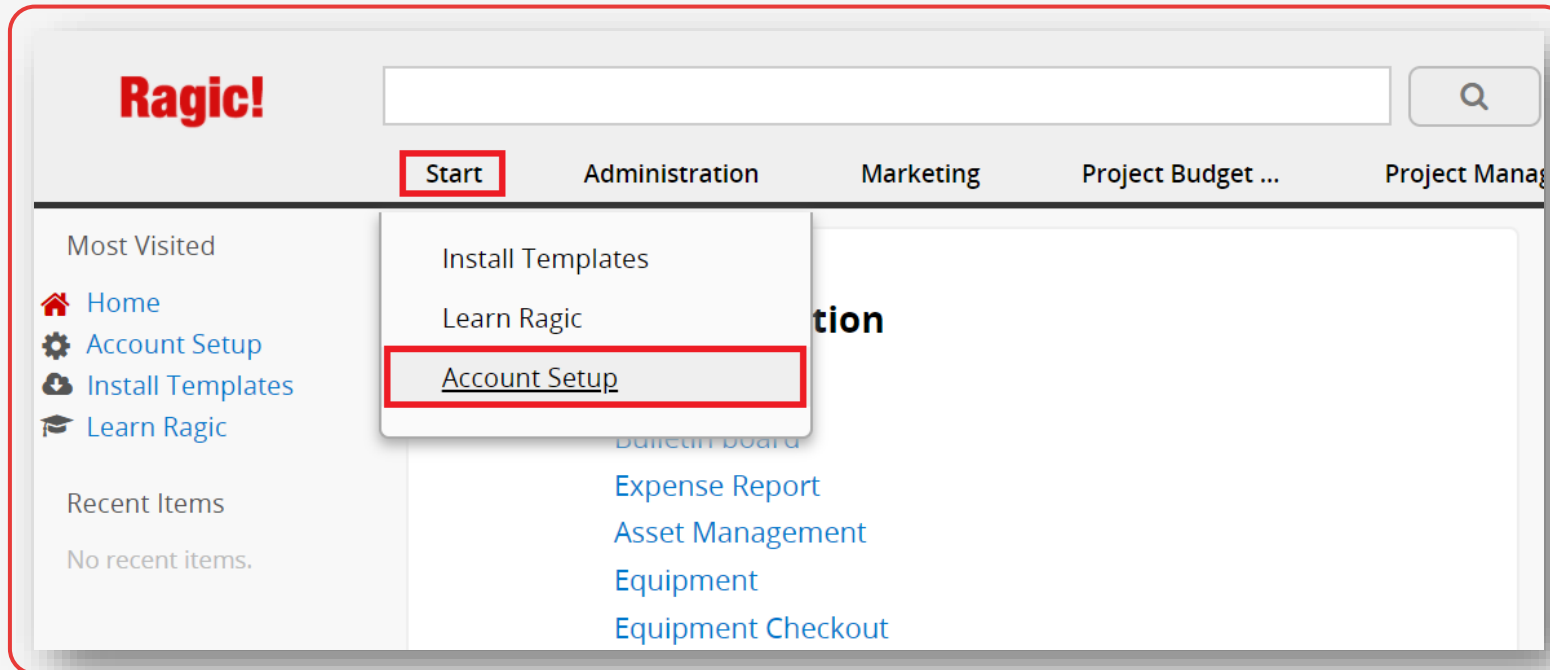
Managing users



Get the hang of Ragic

Managing users 1

Adding new users



1 Define user groups

2 Configure access rights

3 Add new users and assign them to appropriate groups

Managing users 2

Need more groups?

Account Setup

- Users
- External Users
- Groups**
- Access Rights
- Account Billing
- Backup & Restore
- Recent Changes
- Job Schedules
- DB Maintenance
- Company Setting
- Feature Settings
- Global Constants
- Notifications
- UI Translations
- Recycle Bin
- Account Home

Views

+New Tools ↕ ↻

Groups

Listing all the groups in your account. Please do not remove or rename system default groups.
Please do not rename the system default groups

+ Group Name	Group Description
EVERYONE	System default group for everyone including users not logged in yet.
IT	IT department
Sales	Sales department
Accounting	Accounting department
HR	Human resource department
Management	Company management
X-User	System default group for external users such as clients, vendors, partners and freelancers. External users are free!
User	System default group for internal employees.
SYSAdmin	System group with full privilege to account and form designer.

Calculate total for all records

1 → Just add the new user groups that you need

Managing users 3

Configure access rights on all of sheets for each user group

Account Setup

Save

Check out [how access right setting works.](#)

	EVERYONE	User	X-User	Management	HR	Accounting
				Administration		
Phone Book		Bulletin User ▼		Admin ▼	Admin ▼	Viewer ▼
Bulletin board		Bulletin User ▼		Admin ▼	Viewer ▼	Viewer ▼
Expense Report		Bulletin User ▼		Admin ▼	Survey User ▼	Admin ▼
Asset Management		Bulletin User ▼		Admin ▼		Admin ▼
Equipment		Bulletin User ▼		Admin ▼		

1

Option 1: Global Access Rights Panel

Managing users 4

Start Administration Marketing Project Budget ...

Add Components Field Settings **Form Settings** Save Exit Form To

Actions Reminder

Form Settings **Access Rights**

EVERYONE:
Visitors not signed in yet. No Rights

User:
Internal user default group. Bulletin User No Edit No Create

X-User:
External user default group. No Rights

Management:
No Rights

HR:
No Rights

Accounting:
No Rights

Sales:
No Rights

Phone Book

Optional description of your form

	A	B
1		Basic
2	*Full Name	Free Text
3	Employee ID	Free Text
4		
5		Contact
6	Department	Selection
7	Mobile	XXX-XXX-XXXX
8	Office Phone	XXX-XXX-XXXX
9		
10		

1 Option 2: Setting up Access Rights for Individual Sheets

2 Additional Access Rights Settings

Managing users 5

1 → Add new users

The screenshot shows the Ragic! user management interface. The navigation menu on the left includes 'Users', 'External Users', 'Groups', 'Access Rights', 'Account Billing', 'Backup & Restore', 'Recent Changes', and 'Job Schedules'. The main content area has a '+New' button highlighted. Below it, a table lists users with columns for E-mail, User Name, Status, and Groups. A red box highlights the table header and the first row.

E-mail	User Name	Status	Groups
rex@ragic.com	Rex	NORMAL	SYSAdmin, User

2 → List all users in this database

Managing users 6

Save Cancel Draft saved at: 16:07 PM

New User

Ragic will send an e-mail to the new users and guide them through new user setup.

Internal User Setting	
*E-mail (?)	<input type="text"/>
*Full Name (?)	<input type="text"/>
Ragic Groups (?)	User

Employee information	
Employee Number	<input type="text"/>
Title	<input type="text"/>
Company	<input type="text"/>
Department	<input type="text"/>
Division	<input type="text"/>

System Information	
*Status (?)	NORMAL
System Log (?)	<input type="text"/>
Internal/External	<input type="text"/>

1

Ragic will send an e-mail to the new users and guide them through the setup process

Managing users 7

Save Cancel Draft saved at: 16:14 PM

New User

Ragic will send an e-mail to the new users and guide them through new user setup.

Internal User Setting

*E-mail (?)	amy@ragic.com	Picture
*Full Name (?)	Amy Hampton	
Ragic Groups (?)	User	

Employee information

Employee Number	
Title	
Company	
Department	
Division	
Direct Supervisor	
Deputy	

System Information

*Status (?)	NORMAL
System Log (?)	
Internal/External	

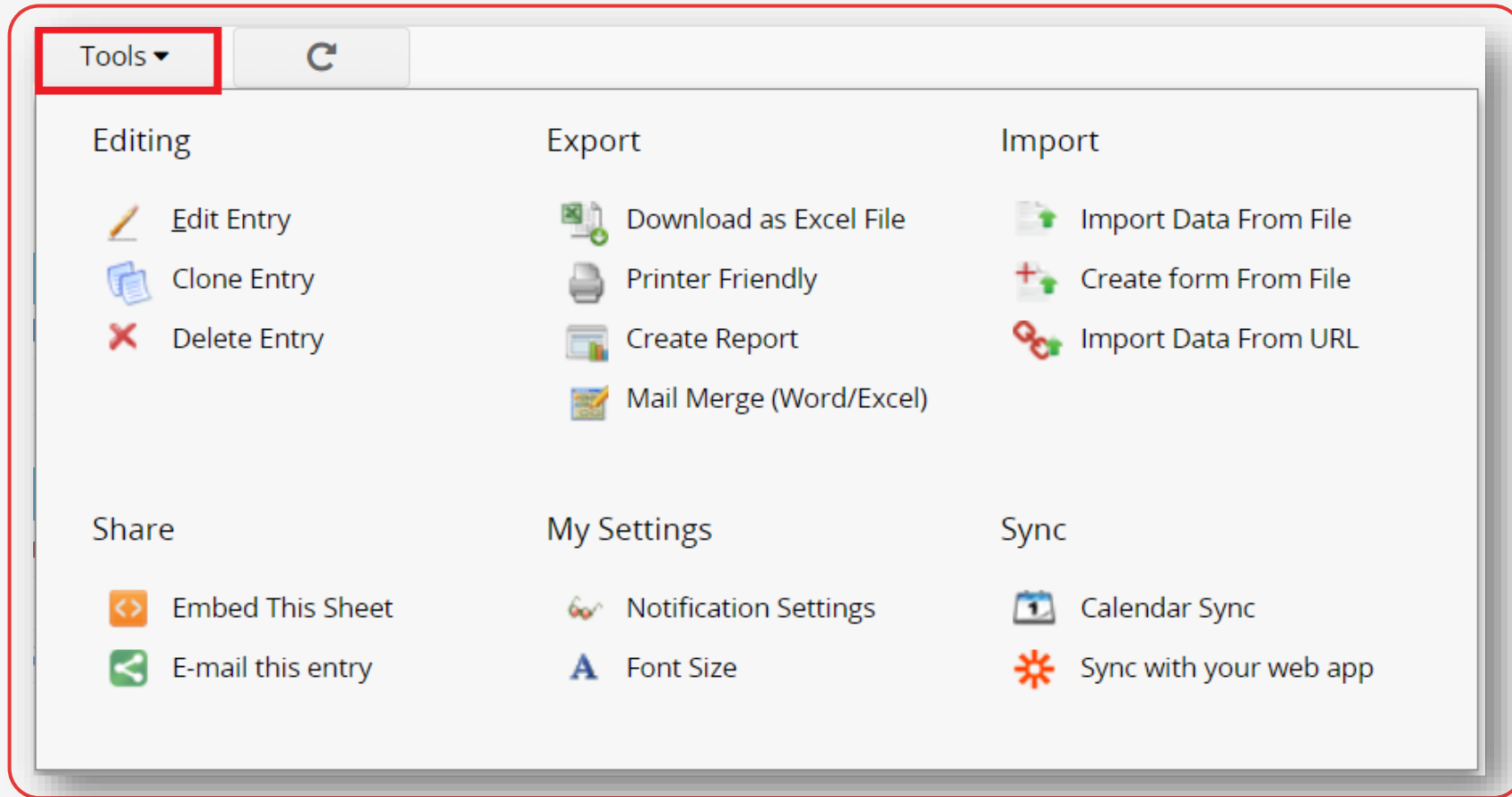
Ragic Groups (dropdown menu):

- Accounting
- EVERYONE
- HR
- IT
- Management
- SYSAdmin
- Sales
- User
- X-User

1 You can assign users to more than one group

Managing users 8

Decide who can access these features



Managing users 9

Decide who can access these features

Account Setup

- Users
- External Users
- Groups
- Access Rights
- Account Billing
- Backup & Restore
- Recent Changes
- Job Schedules
- DB Maintenance
- Company Setting
- Feature Settings**
- Global Constants
- Notifications
- UI Translations

← +New Tools ↻

Feature Access Settings

For each feature, pick the groups that should be able to use this feature.

Config Name	Default
Import/Export	
Import Data From File	SYSAdmin
Download Listing Page	EVERYONE
Download Form Page	EVERYONE
Reporting	
View Report	EVERYONE
Generate Website Plugins	SYSAdmin
Mass Actions	
Mass E-mail	EVERYONE
Mass SMS	EVERYONE
Mass Delete	SYSAdmin
Basic Actions	
Delete Record	SYSAdmin
Clone Record	EVERYONE
Email Record	EVERYONE

1

Configure feature access rights for user groups



Searching and filtering



Get the hang of Ragic

Searching 1

Full Text Search

The screenshot shows the Ragic! application interface. At the top, there is a search bar containing the text "Marketing". Below the search bar, there are navigation tabs: "Start", "Administration", "Marketing", "Project Budget ...", and "Project Manag". On the left side, there is a sidebar with "Most Visited" and "Recent Items" sections. The main content area displays the search results for "Marketing". The results are titled "Ragic Full Text Search" and include a "Back to Application" link. There are 5 records. The first record is for Rex Haller, with the following details: "Entry ID", "Full Name Rex Haller", "Department Marketing" (highlighted with a red box), "Title", "Office Phone +18-886-668037", "Extension 18", "Email rex@ragic.com", and "Job Status Confirmed". Below this record, there is a link to "Rex Haller" and the text "Phone Book / Administration". The second record is also for Rex Haller, with the following details: "Full Name Rex Haller", "Department Marketing" (highlighted with a red box), "Office Phone +18-886-668037", and "Extension 18".

1

If you search on the "Home page", the full text search results will apply to the entire database

2

If you search on a specific sheet, the full text search results will only apply to that sheet

Searching 2

Filter Specific Field

Sales Orders

Sales Order #	Customer ID	Customer Name	Date	Shipping Date	Total
SO-00462	Cust-01244	Gayle Rudolph	2017/09/30	2017/10/04	\$1,920
SO-00461	Cust-01245	Willie Engelhardt	2017/09/29	2017/09/20	\$6.58
SO-00460	Cust-01245	Willie Engelhardt	2017/09/01	2017/09/19	\$0
SO-00458	Cust-01242	Matt Colvin	2017/03/29	2017/03/15	\$245
SO-00457	Cust-01242	Matt Colvin	2017/03/15	2017/03/15	\$765
SO-00456	Cust-01248	Kyle Partridge	2016/08/24	2016/08/15	\$360
SO-00448	Cust-01244	Gayle Rudolph	2016/06/24	2015/08/03	\$1,425
SO-00447	Cust-01239	Eric Molina	2016/06/01	2016/06/08	\$10,890.8
SO-00446	Cust-01235	Martin Corson	2015/07/30	2015/08/03	\$1,350
SO-00444	Cust-01238	Rosalie Lopez	2015/05/28	2015/05/30	\$120

Searching 3

Filter Specific Field

Sales Orders

Sales Order #	Customer ID	Customer Name	Date	Shipping Date	Total
SO-00462	Cust-01244	Filter by Text	2017/09/30	2017/10/04	\$1,920
SO-00461	Cust-01245	Clear Filter	2017/09/29	2017/09/20	\$6.58
SO-00460	Cust-01245	Sort Ascending	2017/09/01	2017/09/19	\$0
SO-00458	Cust-01242	Sort Descending	2017/03/29	2017/03/15	\$245
SO-00457	Cust-01242	Clear Sorting	2017/03/15	2017/03/15	\$765
SO-00456	Cust-01248	Total & Summary	2016/08/24	2016/08/15	\$360
SO-00448	Cust-01244	Kyle Partridge	2016/06/24	2015/08/03	\$1,425
SO-00447	Cust-01239	Gayle Rudolph	2016/06/01	2016/06/08	\$10,890.8
		Eric Molina			

Searching 4

Filter Specific Field

Sales Orders

Sales Order #	Customer ID				
SO-00462	Cust-01244				
SO-00461	Cust-01245				
SO-00460	Cust-01245				
SO-00458	Cust-01242	Matt Colvin	2017/03/29	2017/03/15	\$245
SO-00457	Cust-01242	Matt Colvin	2017/03/15	2017/03/15	\$765
SO-00456	Cust-01248	Kyle Partridge	2016/08/24	2016/08/15	\$360
SO-00448	Cust-01244	Gayle Rudolph	2016/06/24	2015/08/03	\$1,425

Enter the text that you would like to search for

Exact match

1 → Input your query

Searching 5

Filter Specific Field

The screenshot shows a web application interface for viewing sales orders. At the top, there are several buttons: '+New', 'Tools', a refresh icon, and 'Clear Filter'. The 'Clear Filter' button is highlighted with a red box. Below the buttons, the title 'Sales Orders' is displayed with a dropdown arrow. A table of sales orders is shown with columns: Sales Order #, Customer ID, Customer Name, Date, Shipping Date, and Total. The 'Customer Name' column is highlighted with a red box, indicating a filter is applied. The table contains 14 rows of data, all with 'Rosalie Lopez' as the customer name. At the bottom left, there is a button with a grid icon and the text 'Calculate total for all currently filtered records'.

Sales Order #	Customer ID	Customer Name	Date	Shipping Date	Total
SO-00444	Cust-01238	Rosalie Lopez	2015/05/28	2015/05/30	\$120
SO-00434	Cust-01238	Rosalie Lopez	2015/03/06	2015/03/07	\$625
SO-00433	Cust-01238	Rosalie Lopez	2015/03/05	2015/03/06	\$457
SO-00424	Cust-01238	Rosalie Lopez	2015/02/24	2015/02/25	\$1,560
SO-00423	Cust-01238	Rosalie Lopez	2015/02/23	2015/02/24	\$1,366
SO-00414	Cust-01238	Rosalie Lopez	2015/02/14	2015/02/15	\$1,395
SO-00413	Cust-01238	Rosalie Lopez	2015/02/13	2015/02/14	\$1,268
SO-00404	Cust-01238	Rosalie Lopez	2015/02/04	2015/02/05	\$1,930
SO-00403	Cust-01238	Rosalie Lopez	2015/02/03	2015/02/04	\$1,300
SO-00394	Cust-01238	Rosalie Lopez	2015/01/25	2015/01/26	\$905
SO-00393	Cust-01238	Rosalie Lopez	2015/01/24	2015/01/25	\$1,551
SO-00384	Cust-01238	Rosalie Lopez	2014/04/02	2014/04/03	\$256
SO-00383	Cust-01238	Rosalie Lopez	2014/02/24	2014/02/25	\$350

1 → Clear Filter

2 → Result

Searching 6

Filter more than one field

The screenshot shows a CRM interface with a search sidebar on the left and a data table on the right. The sidebar is highlighted with a red box and contains the following elements:

- Search button
- Save as View link
- Settings gear icon
- Filter list:
 - Next Signer
 - Approval
 - Created by
 - Create Date
 - Customer ID
 - Sales Order #
 - Order Fulfillment
 - Customer Name (expanded)
 - Date (expanded)
 - Order Confirmation
 - Cellphone

The main area shows a table titled "Sales Orders" with the following columns and data:

Sales Order #	Customer ID	Customer Name	Date
+ SO-00434	Cust-01238	Rosalie Lopez	2015/03/06
SO-00433	Cust-01238	Rosalie Lopez	2015/03/05
SO-00424	Cust-01238	Rosalie Lopez	2015/02/24
SO-00423	Cust-01238	Rosalie Lopez	2015/02/23
SO-00414	Cust-01238	Rosalie Lopez	2015/02/14
SO-00413	Cust-01238	Rosalie Lopez	2015/02/13
SO-00404	Cust-01238	Rosalie Lopez	2015/02/04
SO-00403	Cust-01238	Rosalie Lopez	2015/02/03
SO-00394	Cust-01238	Rosalie Lopez	2015/01/25
SO-00393	Cust-01238	Rosalie Lopez	2015/01/24

Searching 7

Saving frequent searches as views

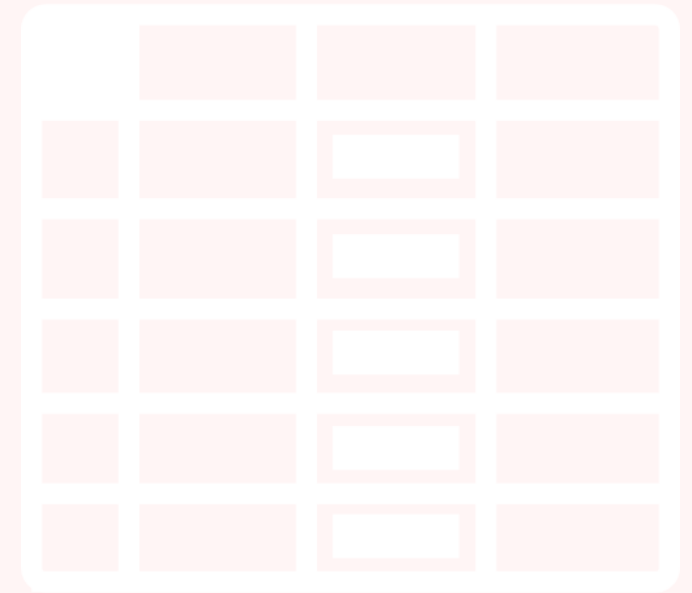
1 Click

The screenshot shows a search interface with a left sidebar containing filters like 'Next Signer', 'Approval', and 'Customer Name'. A search bar at the top left contains the text 'Lopez'. A 'Save as View' button is highlighted with a red box. A modal dialog box titled 'Create a New:' is open, showing options for 'Personal View', 'Shared View', and 'Fixed Filter'. A red box highlights the input field for naming the view. Below the dialog, a table of search results is visible.

SO-00414	Cust-01238	Rosalie Lopez	2015/02/14	2015/02/15
SO-00413	Cust-01238	Rosalie Lopez	2015/02/13	2015/02/14
SO-00404	Cust-01238	Rosalie Lopez	2015/02/04	2015/02/05
SO-00403	Cust-01238	Rosalie Lopez	2015/02/03	2015/02/04

2 Name this view

Integrating with Excel



Get the hang of Ragic

Integrating with Excel - 1

Prepare Import Files

1 The headers of the fields

	A	B	C	D	E	F
1	Employee ID	First Name	Last Name	Department	Date of Birth	Email
2	E-00024	Rex	Haller	Marketing	02/21/1989	rex@ragic.com
3	E-00025	Amy	Hampton	Sales	01/21/1991	amy@ragic.com
4	E-00026	Charles	Wang	Customer Service	06/21/1983	charles@ragic.com
5	E-00027	Payton	Ajayi	Financial	12/25/1980	payton@ragic.com

2 Key field

Integrating with Excel - 2

Import File

The screenshot shows a software interface with a 'Tools' dropdown menu open. The menu is divided into several sections: Editing, Export, Import, Share, My Settings, and Sync. The 'Import' section is highlighted with a red box, and a red arrow points to it from the text '1 Click'. The 'Import' section contains the following options: 'Import Data From File', 'Create form From File', 'Mass file upload', and 'Import Data From URL'. The 'Export' section contains: 'Download as Excel File', 'Download as Text File', 'Printer Friendly', 'Create Report', 'Mail Merge (Word/Excel)', 'Publish to The Web', and 'Schedule Report'. The 'Editing' section contains: 'Edit Multiple Entries', 'Mass Update', and 'Delete All Filtered'. The 'Share' section contains: 'Embed This Sheet', 'Send mass e-mail', and 'Send mass SMS'. The 'My Settings' section contains: 'Notification Settings' and 'Font Size'. The 'Sync' section contains: 'Calendar Sync' and 'Sync with your web app'. The interface also shows a '+New' button, a 'Tools' dropdown, a refresh icon, a 'Clear Filter' button, and a '1 - 4 of 4' indicator.

1 Click

Integrating with Excel - 3

Import File

1 Choose File

2 Upload

Upload your file (Supported file types: .xls .xlsx .csv)

Select your file:

Choose File No file chosen

Upload

We recommend you [save your file as CSV](#) for best performance.

< Back

Next >

3 Next

Integrating with Excel - 4

Import File

Choose your worksheet and determine header

Choose your worksheet: Sheet 1 ▾

Please check if the first row of your data is the header and if you need to reverse import sequence?

The first row is the header Reverse the order on your file (Ragic displays latest entries first)

Employee ID	First Name	Last Name	Department	Date of Birth	Email
E-00024	Rex	Haller	Marketing	02/21/1989	rex@ragic.com
E-00025	Amy	Hampton	Sales	01/21/1991	amy@ragic.com
E-00026	Charles	Wang	Customer Service	06/21/1983	charles@ragic.com
E-00027	Payton	Ajayi	Financial	12/25/1980	payton@ragic.com

! Importing a file with duplicated values in the first column may cause...

< Back

Next >

Reset

Cancel

1

Next

Integrating with Excel - 5

Import File

Map data to Ragic fields

Please carefully select the target fields in Ragic that you would like each of your data field to import to.

Employee ID	First Name	Last Name	Department	Date of Birth	Email
Employee ID ▾	ignore ▾	ignore ▾	Department ▾	ignore ▾	E-mail ▾
E-00024	Rex	Haller	Marketing	02/21/1989	rex@ragic.com
E-00025	Amy	Hampton	Sales	01/21/1991	amy@ragic.com
E-00026	Charles	Wang	Customer Service	06/21/1983	charles@ragic.com
E-00027	Payton	Ajayi	Financial	12/25/1980	payton@ragic.com

1 Map Fields

< Back

Next >

2 Next

Integrating with Excel - 6

Import File

Import policy

Please choose a policy to handle duplicated key during import. The key field is the first same key field value.

- Create new record:** Always create a new record on Ragic for each source record.
- Renew data:** Update existing record on Ragic with the same key value, create one

Advanced

You can import your data with the following optional actions:

- Fill in default field values**
- Execute link and load**
- Recalculate all formulas**
- Execute workflow**
- Execute not empty check**
- Create detail history**
- Execute validation check**

Please note that these actions will reduce the speed of data import.

Ready to import

Are you ready to import your data into Ragic database?

Import your data!

2 Import

Import complete

Here is the link to your database that you just imported to. You can

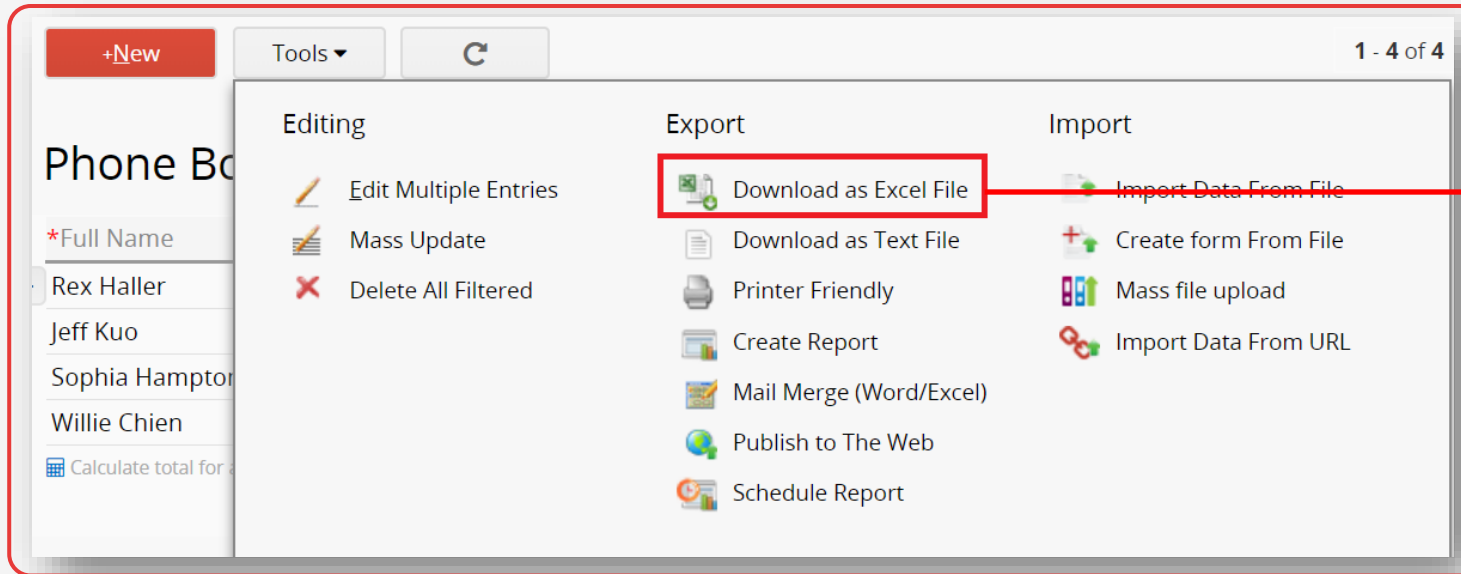
<http://www.ragic.com/LearningRagic/ragicadministration/10012>

1 Advanced Settings

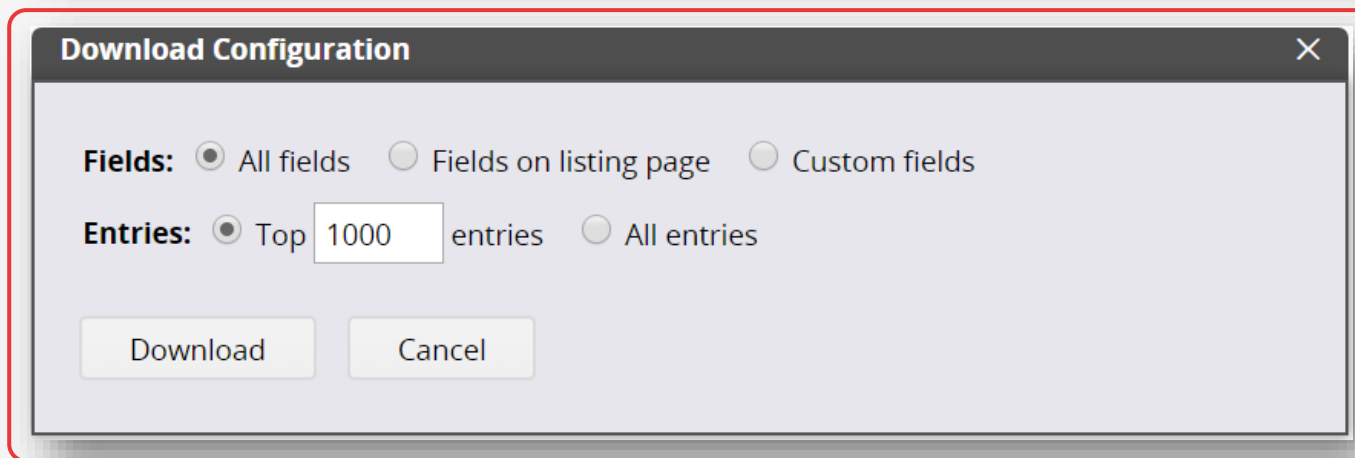
3 Back to database

Integrating with Excel - 7

Export File



1 Click to download



2 Download Configuration



Building data relationships



The Road to Mastery

Data relationship

Linking sheets together

The screenshot shows a software interface with a 'Form Tools' dropdown menu. The 'Sheet Linking' section is highlighted with a red box and contains the following options:

- Link & load (?)**: Links to 3 sheets: Accounts, Product Price List, Products (CRM)
- Multiple versions (?)**: No other versions of this sheet.
- New sheet from subtable (?)**: No linked sheets generated.
- Show references from existing sheets (?)**: No reference subtables.

Other options in the 'Form Tools' menu include:

- Custom Buttons**:
 - Convert records**: 1 convert record button: Create Delivery Note
 - Update values**: 1 Update values button: SO Complete
 - Update value on another sheet**: No button configured.
 - Send custom e-mail**: No button configured.

1 Four different linking tools

Data relationship 1-1

Case 1: When entering sales orders, we want to populate the related customer information which is saved in another form.

Customers

Customer ID	*Customer Name	Cell
Cust-01248	Kyle Partridge	(570)
Cust-01247	Daniel Grant	(508)
Cust-01246	Ted Fisherman	(413)
Cust-01245	Willie Engelhardt	(201)
Cust-01244	Gayle Rudolph	(228)

Sales Orders

Sales Order #	Customer ID	Customer Name	Date	Shipping Date
SO-00462	Cust-01244	Gayle Rudolph	2017/09/30	2017/10/04
SO-00461	Cust-01245	Willie Engelhardt	2017/09/29	2017/09/20
SO-00460	Cust-01245	Willie Engelhardt	2017/09/01	2017/09/19
SO-00458	Cust-01242	Matt Colvin	2017/03/29	2017/03/15
SO-00457	Cust-01242	Matt Colvin	2017/03/15	2017/03/15
SO-00456	Cust-01248	Kyle Partridge	2016/08/24	2016/08/15
SO-00448	Cust-01244	Gayle Rudolph	2016/06/24	2015/08/03

Data relationship 1-2

1 Click here

2 Select from "Customers" sheet

New Sales Orders

Order Information

Customer ID	<input type="text"/>
Customer Name	
Cellphone	
E-mail	
Shipping City	
Shipping Address	
Full Billing Address	

Customers

Customer ID	*Customer Name	Cell	E-mail
Cust-01248	Kyle Partridge	(570) 945-6521	kylep@mail.com
Cust-01247	Daniel Grant	(508) 507-1567	danielgrant@mail.com
Cust-01246	Ted Fisherman	(413) 486-1716	TedFisher@mail.com
Cust-01245	Willie Engelhardt	(201) 726-4292	WillieEngelhardt@mail.com
Cust-01244	Gayle Rudolph	(228) 460-6867	GayleRudolph@mail.com
Cust-01243	Terry Tutt	(978) 649-5754	TerryTutt@mail.com

Data relationship 1-3

Order Information			
Customer ID	Cust-01248	Sales Order Number	SO-00463
Customer Name	Kyle Partridge	Date	2018/03/08
Cellphone	(570) 945-6521	Shipping Date	2018/03/15
E-mail	kylep@mail.com	Ship Via	
		Tracking No.	
Shipping City	Sugar Notch		
Shipping Address (?)	Mr. Kyle Partridge 456 Conference Center Way Sugar Notch Penns United States 18706		
Full Billing Address	456 Conference Center Way Sugar Notch Pennsylvania United Sta		

1 Select customer ID

2 Populate corresponding information

Data relationship 1-4

Link & Load

The screenshot shows the 'Form Tools' menu with the following items:

- Save**
- Exit**
- Form Tools** (highlighted with a red box)
- Editing Descriptions**

The 'Form Tools' menu is divided into two columns:

- Sheet Linking**
 - Link & load (?)** (highlighted with a red box): Links to 2 sheets: Customers ⚙️, Products ⚙️
 - Multiple versions (?)**: 4 other versions of this sheet: Sales Orders ⚙️, Outgoing Orders ⚙️, Customer Orders ⚙️, Sales Orders - Foreign ⚙️
 - New sheet from subtable (?)**: 4 linked sheets generated from subtables on this sheet: Product Order Rate ⚙️, Sales Information ⚙️, Sales Information copy ⚙️, Sales Information ⚙️
- Custom Buttons**
 - Convert records**: 1 convert record button: Generate Shipping Label
 - Update values**: 1 Update values button: Add Tracking
 - Update value on another sheet**: 1 Update value on another sheet button: Post to Inventory
 - Send custom e-mail**: 1 Send custom e-mail button: Send : Order Details

1 Click

Data relationship 1-5

Link & Load

1 Set up the Linked Field

The screenshot shows a data relationship setup interface with two tables. A blue line connects the 'Customer' field in the 'Order Information' table to the 'Customer ID' field in the 'Customer Personal Information' table.

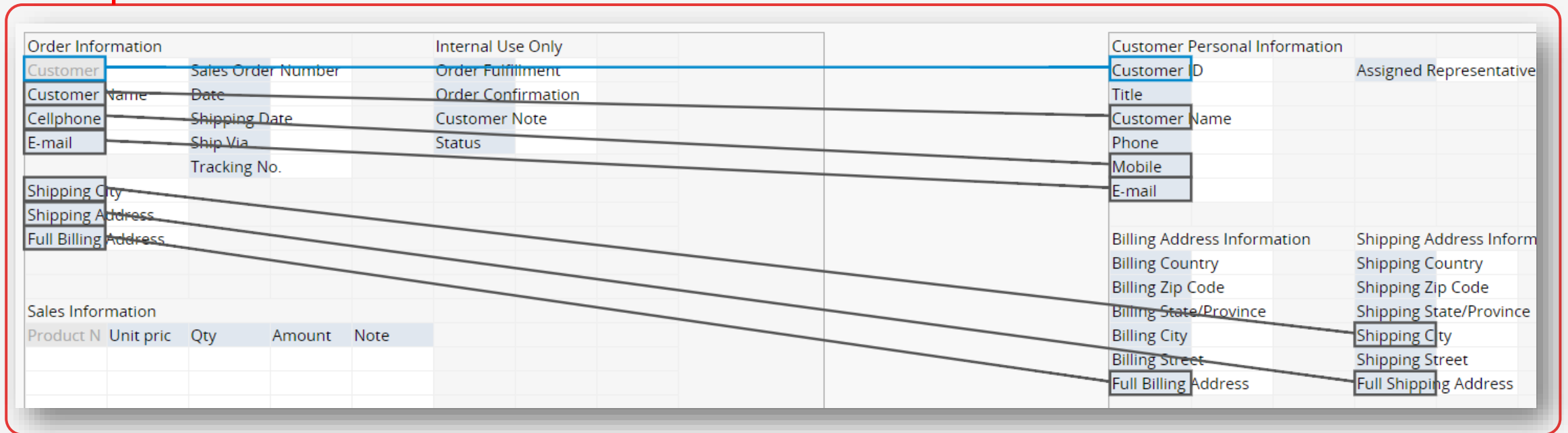
Order Information					Internal Use Only				
Customer	Sales Order Number				Order Fulfillment				
Customer Name	Date				Order Confirmation				
Cellphone	Shipping Date				Customer Note				
E-mail	Ship Via				Status				
	Tracking No.								
Shipping City									
Shipping Address									
Full Billing Address									
Sales Information									
Product N	Unit pric	Qty	Amount	Note					

Customer Personal Information				
Customer ID				
Title				
Customer Name				
Phone				
Mobile				
E-mail				
Billing Address Information				
Billing Country				
Billing Zip Code				
Billing State/Province				
Billing City				
Billing Street				
Full Billing Address				

Data relationship 1-6

Link & Load

1 Link the Loaded Fields to the corresponding cells



Data relationship 2-1

Case 2: Sometimes you will want to create different versions of the same form so that different groups of users can see different versions.

Billing Statement

Billing Information			
No.	C-00001	Budget ID	B-00001
Receipt Date			
Payment Date	2017/12/31	Payment Terms	Check
Request Date	2017/12/27	Charge-off Date	2017/12/31
Type of Request	Purchased		
Applicant	Rex	Receiver	Facebook
Purpose	Facebook ad	Days after Date	30
Drawee Bank	Citibank	Account Number	98757432
Price	\$1,500	Quantity	1
		Amount	\$1,500

Reimbursements				
Reimbursement Item	Receipt Date	Note	Receipt Image	

Billing Statement (Accountant Only)

Billing Information			
No.	C-00001	Budget ID	B-00001
Receipt Date			
Payment Date	2017/12/31	Payment Terms	Check
Request Date	2017/12/27	Charge-off Date	2017/12/31
Type of Request	Purchased		
Applicant	Rex	Receiver	Facebook
Purpose	Facebook ad	Days after Date	30
Drawee Bank	Citibank	Account Number	98757432
Price	\$1,500	Quantity	1
		Amount	\$1,500

Reimbursements				
Reimbursement Item	Receipt Date	Note	Receipt Image	Amount

Accountant Only	
Status	Paid
Receipt Status	
Charge-off Date	2018/03/14
Voucher Date	
Voucher Number	
Cumulative Total	\$1,500
Reimbursement Total	\$0
Shortage of Reimbursement	\$1,500
Photo	Note

Data relationship 2-2

Multiple Versions

1 Click here

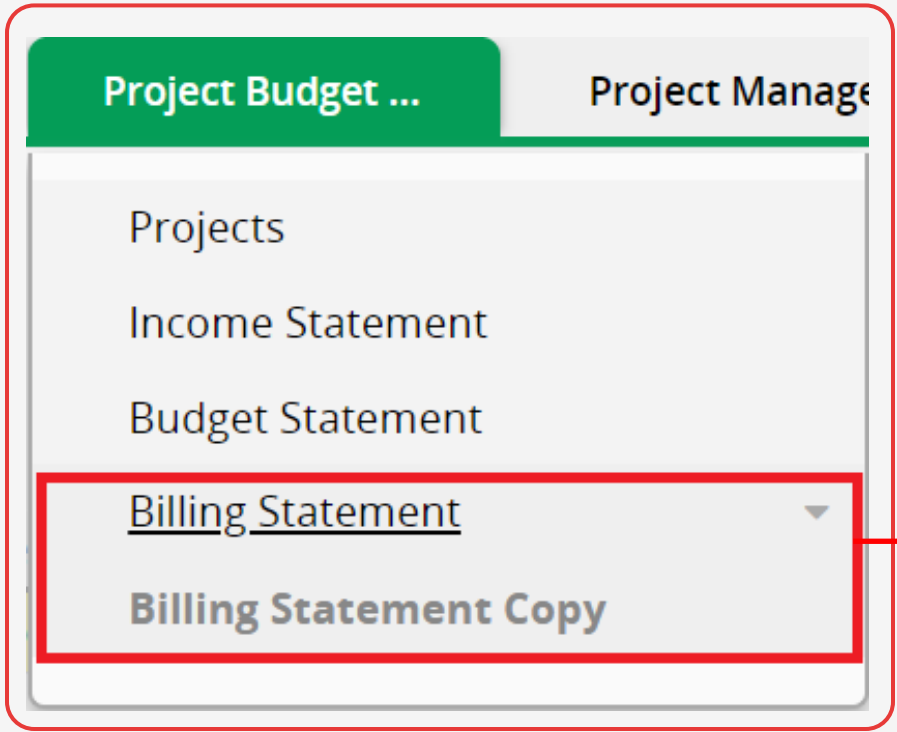
2 Duplicate Sheet

The screenshot shows a software interface with a table titled "Billing Statement" and a "Form Tools" menu. The table has columns for "No.", "Receipt Date", "Payment Date", "Request Date", "Type of Request", "Applicant", "Purpose", "Drawee Bank", and "Price". The "Form Tools" menu includes options like "Link & load", "Multiple versions", "New sheet from subtable", and "Show references from existing sheets". A dialog box titled "Duplicate Sheet" is open, with a checkbox for "Use same data source on new sheet" and a "Duplicate Sheet" button. A red box highlights the "Multiple versions (?)" option in the menu, and another red box highlights the "Duplicate Sheet" button in the dialog box. Red arrows point from the text "1 Click here" and "2 Duplicate Sheet" to these elements.

No.	Receipt Date	Payment Date	Request Date	Type of Request	Applicant	Purpose	Drawee Bank	Price
1								
2								
3								
4								
5			2018/03					
6								
7								
8								
9								
10								
11								

Data relationship 2-3

Multiple Versions



1

All edits and deletion of entry values will be reflected on both sheets

Data relationship 2-4

Multiple Versions

1 Fields, access right and layout can be different from another sheet

The screenshot displays the Microsoft Excel interface for creating a form. On the left, the 'Validation' task pane is open, showing the 'Basic' tab. The 'Field Name' is 'No.' with a 'Field Id' of 2000416. The 'Field Type' is set to 'Auto Generate' with the 'Not Empty' checkbox checked. The 'Formatting' section shows a list of options, with 'C-{0,number,00000}' selected. The 'Sequence Status' is currently empty.

The main area shows a spreadsheet titled 'Billing Statement Copy' with columns A through G. The spreadsheet is divided into sections: 'Billing Information' (rows 2-12), 'Reimbursements' (rows 14-16), and 'Accountant Only' (rows 2-12, columns F-G). The 'No.' field in row 2, column A is highlighted with a black box. The 'Reimbursements' section includes fields for 'Reimbursement Item', 'Receipt Date', 'Note', 'Receipt Image', and 'Amount'. The 'Accountant Only' section includes fields for 'Status', 'Receipt Status', 'Charge-off Date', 'Voucher Date', 'Voucher Number', 'Cumulative Total', 'Reimbursement Total', and 'Shortage of Reimbursement'.

	A	B	C	D	E	F	G
1	Billing Information						Accountant Only
2	No.	Auto Generate	Budget ID	Select from other Sheet		Status	Selection
3	Receipt Date	yyyy/MM/dd				Receipt Status	Selection
4	Payment Date	yyyy/MM/dd	Payment Terms	Selection		Charge-off Date	yyyy/MM/dd
5	Request Date	2018/03/08	Charge-off Date	yyyy/MM/dd		Voucher Date	yyyy/MM/dd
6	Type of Request	Selection				Voucher Number	Free Text
7	Applicant	Select User	Receiver	Free Text			
8	Purpose	Free Text	Days after Date	Selection		Cumulative Total	fx0 \$#,####
9	Drawee Bank	Free Text	Account Number	Free Text		Reimbursement Total	fx0 \$#,####
10	Price	\$#,####.#####	Quantity	#,####.#####		Shortage of Reimbursement	fx0 \$#,####
11			Amount	fx0 \$#,####.#####			
12						Photo	Note
13	Reimbursements						
14	Reimbursement Item	Receipt Date	Note	Receipt Image	Amount	Upload Image	Free Text
15	Free Text	yyyy/MM/dd	Free Text	Upload Image	\$#,####.#####	Upload Image	Free Text
16	Free Text	yyyy/MM/dd	Free Text	Upload Image	\$#,####.#####	Upload Image	Free Text

Data relationship 3-1

Case 3: To make the data in the subtables more accessible, you can create a new sheet from a subtable.

Sales Order #	*Product #	Product Name	Specification
SO-20180308-001	P-00003-2	A4 Recycled Notebook	A4
SO-20180308-001	P-00002-1	Gel Ink Pen 0.5 Black	0.5 Black
SO-20180308-001	P-00001-2	Gel Ink Pen 0.5 Blue	0.5 Blue
SO-20180205-001	P-00002-1	Gel Ink Pen 0.5 Black	0.5 Black
SO-20180205-001	P-00003-2	A4 Recycled Notebook	A4

1
Contains all of the subtable entries

Data relationship 3-2

New Sheet from Subtable

1 Click

2 Create new sheet

The screenshot shows a software interface with a 'Form Tools' dropdown menu open. The 'Form Tools' menu includes options like 'Sheet Linking', 'Link & load', 'Multiple versions', 'New sheet from subtable', 'Show references from existing sheets', 'Update value on another sheet', and 'Send custom e-mail'. The 'New sheet from subtable' option is highlighted with a red box. A dialog box titled 'Create New Form From Subtable' is also shown, with a 'Create new sheet' button highlighted by a red box. The dialog box contains a dropdown menu for 'Sales Order #' and a table with columns: '#', 'Product #', 'Product Name', 'Specification', and 'Unit Price'.

Save Exit **Form Tools** Editing Desc

Create New Form From Subtable

Sheet Linking

Link & load (?)
Links to 3 sheets:
Accounts, Product P
Products (CRM)

Multiple versions (?)
No other versions of th

New sheet from subtable (?)
1 linked sheet generated from
subtables on this sheet:
Sales Information

**Show references from existing
sheets (?)**
No reference subtables.

Update value on another sheet
No button configured.

Send custom e-mail
No button configured.

Create new sheet from this subtable:
The new sheet will link back to this form by selecting a: Sales Order #

#	Product #	Product Name	Specification	Unit Price

Data relationship 3-3

New Sheet from Subtable

- 1 The newly created form will contain an additional field that will link back to your original form

Sales Information			
Sales Order #	*Product #	Product Name	Specification
SO-20180308-001	P-00003-2	A4 Recycled Notebook	A4
SO-20180308-001	P-00002-1	Gel Ink Pen 0.5 Black	0.5 Black
SO-20180308-001	P-00001-2	Gel Ink Pen 0.5 Blue	0.5 Blue
SO-20180205-001	P-00002-1	Gel Ink Pen 0.5 Black	0.5 Black
SO-20180205-001	P-00003-2	A4 Recycled Notebook	A4

Data relationship 4-1

Case 4: To see all sales orders a customer has placed, we can add a reference subtable on the Accounts sheet.

Accounts

Account Information					
*Account Name	Ragic, Inc.	Short Name	Ragic	Account ID	C-00001
EIN / VAT Number		*Account Owner		Payment Method	T/T
Employees	35	Website	www.ragic.com	Payment Term	Net 30
Industry	Technology	Contact Person	Jeff Kuo	Accounts Payable Date	
Phone	886-668-037	Contact Mobile		Incoterms	
Fax		Contact E-mail	amy@ragic.com.tw	Ship Via	Airmail
Description				Remarks	
Full Billing Address	14228 SE Allen Road Bellevue Washington USA 98006		Full Shipping Address	14228 SE Allen Road Bellevue Washington USA 94110	

Order Records					
Sales Order No.	Date	Order Category	Status	Customer Name	Amount Due
SO-20180205-001	2018/02/05		Complete	Ragic, Inc.	\$78.78
SO-20180308-001	2018/03/08		Complete	Ragic, Inc.	\$30.13
SO-20180308-002	2018/03/08		Complete	Ragic, Inc.	\$86.74
Auto Generate					

Data relationship 4-2

Show References from Existing Sheets

1 Click

2 Choose the sheet you want to reference to

The screenshot displays a software interface for configuring data relationships. On the left, a form titled "Accounts" is visible, with fields such as "Account Name", "EIN / VAT Number", "Employees", "Industry", "Phone", "Fax", "Description", "Full Billing Address", and "Sales Order No.". The "Form Tools" menu is highlighted with a red box, and the "Link to Sheet" dialog box is also highlighted with a red box. The dialog box shows "Sales Order" selected in the "Link to Sheet:" dropdown and "Linked Subtable (Customer ID)" in the "Drag and drop this box to create linked subtable:" field. The background shows a form titled "Accounts" with various fields like "Account Name", "EIN / VAT Number", "Employees", "Industry", "Phone", "Fax", "Description", "Full Billing Address", and "Sales Order No."

Data relationship 4-3

Show References from Existing Sheets

1 Insert reference table

The screenshot displays a software interface with two main sections. The top section is a form titled "Accounts" with a search bar and a description field. Below this is a table with columns A through F. The bottom section is a table titled "Order Records" with columns for Sales Order No., Date, Order Category, Status, Customer Name, and Amount Due. A red box highlights the "Order Records" table, and a red arrow points to it from the text "1 Insert reference table".

Account Information					
*Account Name	Free Text	Short Name	Free Text	Account ID	Auto Generate
EIN / VAT Number	Free Text	*Account Owner	Select User	Payment Method	Selection
Employees	#,###	Website	URL	Payment Term	Selection
Industry	Selection	Contact Person	Free Text	Accounts Payable Date	Selection
Phone	XXX-XXX-XXXX	Contact Mobile	XXX-XXX-XXXX	Incoterms	Selection
Fax	Free Text	Contact E-mail	E-mail	Ship Via	Selection
Description	Free Text			Remarks	Free Text
Full Billing Address	Address		Full Shipping Address	Address	

Order Records					
Sales Order No.	Date	Order Category	Status	Customer Name	Amount Due
Auto Generate	2018/03/09	Selection	Draft	Free Text	\$\$,###.##
Auto Generate	2018/03/09	Selection	Draft	Free Text	\$\$,###.##
Auto Generate	2018/03/09	Selection	Draft	Free Text	\$\$,###.##

Data relationship 4-4

Show References from Existing Sheets

The screenshot displays a software interface with the following sections:

- Accounts**
 - Account Information**

*Account Name	Ragic, Inc.	Short Name	Ragic	Account ID	C-00001
---------------	-------------	------------	-------	------------	---------
- Sales Order**

Sales Order No.	Date	Order Category	Status	*Customer ID	Customer Name	Amount Due	Ship Via
SO-20180308-002	2018/03/08		Complete	C-00001	Ragic, Inc.	\$86.74	Airmail
SO-20180308-001	2018/03/08		Complete	C-00001	Ragic, Inc.	\$30.13	Airmail
SO-20180205-001	2018/02/05		Complete	C-00001	Ragic, Inc.	\$78.78	Airmail

Full Billing Address: 14228 SE Allen Road Bellevue Washington USA 98006
Full Shipping Address: 14228 SE Allen Road Bellevue Washington USA 94110
- Order Records**

Sales Order No.	Date	Order Category	Status	Customer Name	Amount Due
SO-20180205-001	2018/02/05		Complete	Ragic, Inc.	\$78.78
SO-20180308-001	2018/03/08		Complete	Ragic, Inc.	\$30.13
SO-20180308-002	2018/03/08		Complete	Ragic, Inc.	\$86.74
Auto Generate					

1
All of the order records of that account



Improving efficiency with one click



The Road to Mastery

Improving efficiency

Have work done with one click!

Save Exit **Form Tools** Editing Fields

Leads
Optional description of your fo

	A	
1		
2	First Name	Free Text
3	Last Name	Free Text
4	*Full Name	Free Text
5	Title	Free Text
6	E-mail	E-mail
7	Phone	XXX-XXX-X
8	Mobile	XXX-XXX-X
9	Fax	Free Text
10		
11		
12	Country	Free Text

Sheet Linking

- Link & load (?)**
No link & load set on this sheet.
- Multiple versions (?)**
1 other version of this sheet:
Lead Management
- New sheet from subtable (?)**
No linked sheets generated.
- Show references from existing sheets (?)**
No reference subtables.

Custom Buttons

- Convert records**
2 convert record buttons:
Create Account, Create Contact
- Update values**
1 Update values button:
Lead Status: Qualified
- Update value on another sheet**
No button configured.
- Send custom e-mail**
No button configured.

1

Four different custom buttons

Improving efficiency 1-1

Case 1: Creating a button to post some values in this entry to be saved in another sheet.

Leads

Lead Information			
First Name	Amy	*Company	Ragic M
Last Name	Tsai	Industry	Educate
*Full Name	Amy Tsai	Number of Employees	35
Title	Consultant	Department	Sales
E-mail	amy@example.com	Reports To	
Phone		Lead Source	Advert
Mobile	091-276-5567		
Fax			

Actions

- Create Account

ⓘ ⚡ 💬

Address

Improving efficiency 1-2

Create a copy of your data to be saved in another sheet.

Accounts

Account Information			
*Account Name	Ragic Mandarin Institute	Short Name	
Type	▼	Phone	
Website		Fax	
Industry	Education ▼	Contact Person	
EIN / VAT Number		Employees	35
Description			

Billing Address Information		Shipping Address Information	
Billing Country	USA	Shipping Country	
Billing Zip Code	94110	Shipping Zip Code	
Billing State/Province	California	Shipping State/Province	
Billing City	San Francisco	Shipping City	
Billing Street	300 Boylston Aveune	Shipping Street	
Full Billing Address	300 Boylston Aveune San Francisco California USA 94110	Full Shipping Address	

Improving efficiency 1-3

Convert Records

The screenshot shows the 'Form Tools' menu with the following options:

- Sheet Linking**
 - Link & load (?)**: No link & load set on this sheet.
 - Multiple versions (?)**: 1 other version of this sheet: **Lead Management**
 - New sheet from subtable (?)**: No linked sheets generated.
 - Show references from existing sheets (?)**: No reference subtables.
- Custom Buttons**
 - Convert records**: 1 convert record button: **Create Account**
 - Update values**: No button configured.
 - Update value on another sheet**: No button configured.
 - Send custom e-mail**: No button configured.

1 Click

Improving efficiency 1-4

Convert Records

The screenshot shows a 'Convert Records' dialog box. At the top, there is a dropdown menu labeled 'Convert to this sheet:' with 'Accounts' selected. Below this are two columns of dropdown menus: 'Use value from this field' and 'Fill in this field'. The 'Use value from this field' column contains: Company, Industry, Number of Employees, Country, Zip Code, State/ Province, City, Street, and Full Address. The 'Fill in this field' column contains: Account Name, Industry, Employees, Billing Country, Billing Zip Code, Billing State/Province, Billing City, Billing Street, and Full Billing Address. Each dropdown menu has a small 'x' icon to its right. At the bottom left, there is a blue '+' icon. At the bottom, there are two buttons: 'Create convert record button' and 'Remove this button'. Red boxes and arrows highlight these elements: a box around the 'Accounts' dropdown with an arrow pointing to '1 Convert to this sheet'; a box around the two columns of dropdown menus with an arrow pointing to '2 Convert these fields'; and a box around the 'Create convert record button' with an arrow pointing to '3 Create button'.

1 Convert to this sheet

2 Convert these fields

3 Create button

Improving efficiency 2-1

Case 2: You might want to update field values on a record without manually inputting.

Leads

Lead Information			
First Name	Amy	*Company	Ragic Mandarin Institute
Last Name	Tsai	Industry	Education
*Full Name	Amy Tsai	Number of Employees	35
Title	Consultant	Department	Sales
E-mail	amy@example.com	Reports To	
Phone		Lead Source	Advertisement
Mobile	091-276-5567	Origin Campaign	Facebook Campaign
Fax			

Address Information	
Country	USA
State/ Province	California
Street	300 Boylston Aveune
Zip Code	94110
City	San Francis

Actions
Create Account
Lead Status: Qualified

1 Click to update value

Improving efficiency 2-2

Update to "Qualified"

Leads

Lead Information			
First Name	Amy	*Company	Ragic Mandarin Institute
Last Name	Tsai	Industry	Education
*Full Name	Amy Tsai	Number of Employees	35
Title	Consultant	Department	Sales
E-mail	amy@example.com	Reports To	
Phone		Lead Source	Advertisement
Mobile	091-276-5567	Origin Campaign	Facebook Campaign
Fax			

Lead No.	L-00001
Lead Owner	Rex
Last Contact Date	
*Lead Status	Qualified

Address Information			
Country	USA	Zip Code	94110
State/ Province	California	City	San Francis
Street	300 Boylston Aveune		

Actions

Create Account Lead Status: Qualified

Improving efficiency 2-3

Update value on this sheet

The screenshot shows a software interface with a 'Leads' table on the left and a 'Form Tools' menu on the right. The 'Form Tools' menu is open, and the 'Update values' option is highlighted with a red box. A red arrow points from the 'Update values' option to the text '1 Click'.

Leads	
Optional description of your form	
A	
1	
2	First Name Free Text
3	Last Name Free Text
4	*Full Name Free Text
5	Title Free Text
6	E-mail E-mail
7	Phone XXX-XXX-X
8	Mobile XXX-XXX-X
9	Fax Free Text
10	
11	
12	Country Free Text
13	State/ Province Free Text

Form Tools ▾

Editing Descriptions ▾

Sheet Linking

- Link & load (?)**
No link & load set on this sheet.
- Multiple versions (?)**
1 other version of this sheet:
Lead Management ⚙️
- New sheet from subtable (?)**
No linked sheets generated.
- Show references from existing sheets (?)**
No reference subtables.

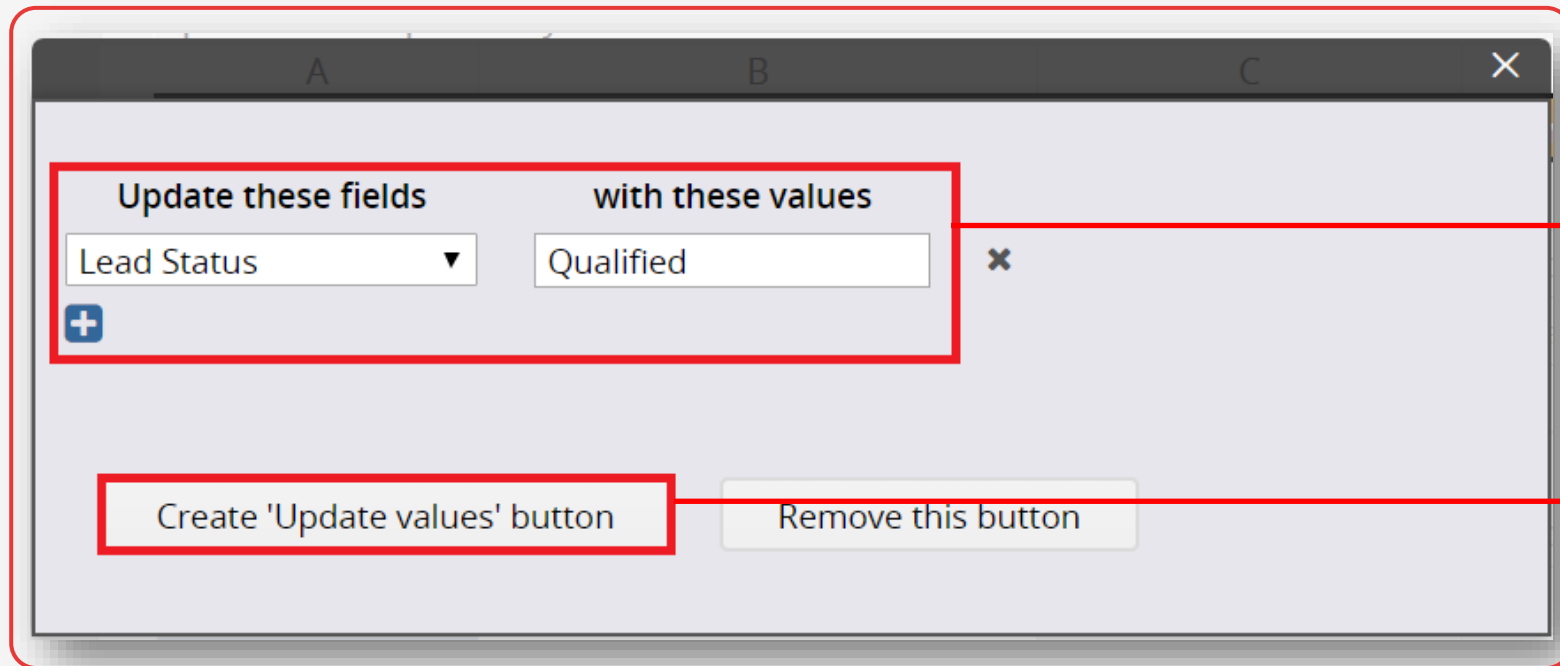
Custom Buttons

- Convert records**
1 convert record button:
Create Account
- Update values**
1 Update values button:
Lead Status: Qualified
- Update value on another sheet**
No button configured.
- Send custom e-mail**
No button configured.

1 Click

Improving efficiency 2-4

Update value on this sheet



1 Update field(s)

2 Create button

Improving efficiency 3-1

Case 3: You might want to update field values in sheet A's records according to the values in a record from sheet B.

Outgoing Stock

Outgoing Stock Information

Outgoing Stock #	OUT-20180205-001	Related Delivery Note #	D-20180205-001
Created By	Rex	Date	2018/02/05
Remarks			

Outgoing Stock Items

Product No.	Product Name	Specification	*Location Code	Location Name	*Inventory No.	*Qty
P-00003	A4 Recycled Notebook	A4	PHX3	Arizona-PHX3	PHX3-P-00003	20

Actions

1

Issuing goods from a Outgoing Stock to change the inventory of the products

Improving efficiency 3-2

Update value on another
"Inventory Sheet"

The diagram illustrates a workflow for updating inventory data. It shows two sequential views of an 'Inventory' sheet for a product named 'A4 Recycled Notebook'. In the first view, the 'Total Qty' is 21. A red box highlights this value. A red arrow points down to the second view, where the 'Total Qty' has been updated to 1, also highlighted by a red box. The rest of the product information, including 'Product No. P-00003', 'Category Sales products', 'Type', 'Specification A4', and 'Description A4 Recycled Notebook', remains consistent between both views.

Product Information	
Product No.	P-00003
Product Name	A4 Recycled Notebook
Total Qty	21
Description	A4 Recycled Notebook

Product Information	
Product No.	P-00003
Product Name	A4 Recycled Notebook
Total Qty	1
Description	A4 Recycled Notebook

Improving efficiency 3-3

Update value on another sheet

The screenshot shows a software interface with a 'Form Tools' menu open. The menu is titled 'Editing Descriptions' and contains several options. The 'Update value on another sheet' option is highlighted with a red box. An arrow points from this option to the text 'Click'.

Save Exit Form Tools Editing Descriptions

Outgoing Stock
Optional description of your form

	A	
1		
2	Outgoing Stock #	Auto Gen
3	Created By	Select Use
4	Remarks	Free Text
5		
6		
7	Product No.	Product N
8	Select from other	Free Text
9	Select from other	Free Text
10	Select from other	Free Text
11		
12		

Sheet Linking

- Link & load (?)**
Links to 4 sheets:
Delivery Note, Inventory, Locations, Location Balance
- Multiple versions (?)**
No other versions of this sheet.
- New sheet from subtable (?)**
No linked sheets generated.
- Show references from existing sheets (?)**
No reference subtables.

Custom Buttons

- Convert records**
No button configured.
- Update values**
No button configured.
- Update value on another sheet**
1 Update value on another sheet button:
Send Outgoing Stock
- Send custom e-mail**
No button configured.

1 Click

Improving efficiency 3-4

Update value on another sheet

What is 'Update value on another sheet'? What can I do with it?

This sheet:

The sheet to be updated:

Use value from this field on sheet Outgoing Stock: update to: this field on sheet Location Balance:

When this field value on sheet Outgoing Stock matches to:

this field value on sheet Location Balance:

Advanced

1

Select sheet to be updated

2

Update to field(s)

3

Conditions

Improving efficiency 4-1

Case 4: Creating a button to send a custom e-mail that contain your entry values.

Interview Invitation

Basic Information	
Applicant No.	CV2018-001
Applicant Name	Lou Solverson
Applicant E-Mail	gozodeer0416+lou@gmail.com
Company Name	A&Q
Position Title	Public Relations Manager
Interview Date	02-05-2018 09:00
Interview Location	Room 101, Street 1

Actions
Send an interview invitation

If you would like to send an interview invitation, click on the "Send an interview invitation" button.

Improving efficiency 4-2

Send custom e-mail

The screenshot shows the 'Form Tools' menu with the following options:

- Sheet Linking**
 - Link & load (?)**: No link & load set on this sheet.
 - Multiple versions (?)**: No other versions of this sheet.
 - New sheet from subtable (?)**: No linked sheets generated.
 - Show references from existing sheets (?)**: No reference subtables.
- Custom Buttons**
 - Convert records**: No button configured.
 - Update values**: No button configured.
 - Update value on another sheet**: No button configured.
 - Send custom e-mail**: 1 Send custom e-mail button: **Send an interview invitation**

1 Click

Improving efficiency 4-3

Design template

The screenshot shows an email composition window with the following fields and content:

- Recipient:** gozodeer0416+lou@gmail.com
- Subject:** Invitation to Interview from A&Q
- Content:**

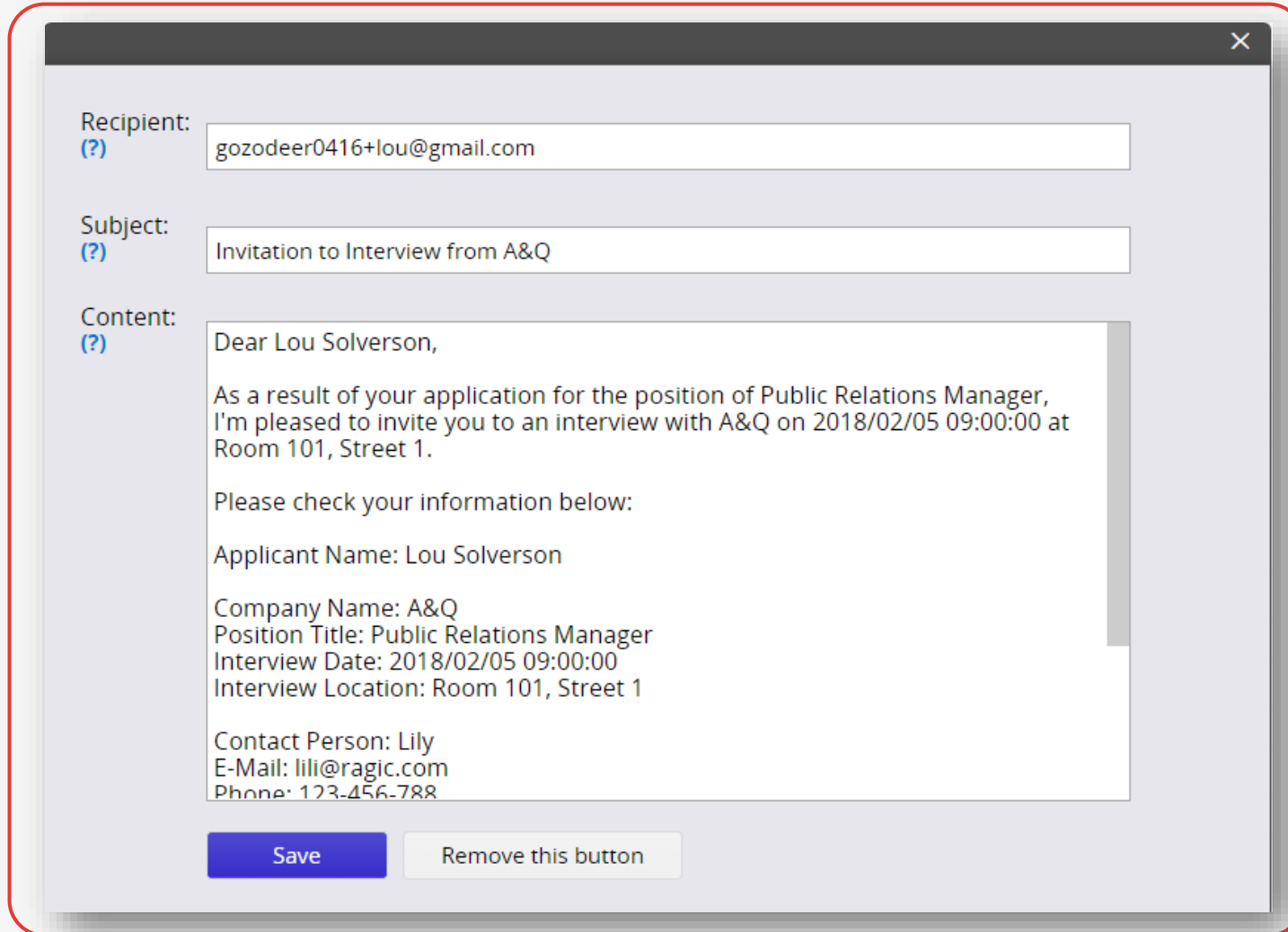
```
Dear {{2001394}},<br/>
<br/>
As a result of your application for the position of {{2001398}},<br/>
I'm pleased to invite you to an interview with {{2001397}} on {{2001399}} at
{{2001400}}.<br/>
<br/>
Please check your information below:<br/>
<br/>
Applicant Name: {{2001394}}<br/>
<br/>
Company Name: {{2001397}}<br/>
Position Title: {{2001398}}<br/>
Interview Date: {{2001399}}<br/>
Interview Location: {{2001400}}<br/>
<br/>
Contact Person: {{2001401}}<br/>
```

At the bottom, there are two buttons: "Save" and "Remove this button".

1 Automatically filled with the values in this entry

Improving efficiency 4-4

Preview template



The image shows a screenshot of a web-based form for previewing an email template. The form is contained within a window with a close button in the top right corner. It features three main sections: 'Recipient', 'Subject', and 'Content'. Each section has a label with a blue question mark icon to its left. The 'Recipient' field contains the email address 'gozodeer0416+lou@gmail.com'. The 'Subject' field contains the text 'Invitation to Interview from A&Q'. The 'Content' field is a large text area containing a personalized email message. At the bottom of the form, there are two buttons: a blue 'Save' button and a grey 'Remove this button' button.

Recipient: (?) gozodeer0416+lou@gmail.com

Subject: (?) Invitation to Interview from A&Q

Content: (?) Dear Lou Solverson,
As a result of your application for the position of Public Relations Manager, I'm pleased to invite you to an interview with A&Q on 2018/02/05 09:00:00 at Room 101, Street 1.
Please check your information below:
Applicant Name: Lou Solverson
Company Name: A&Q
Position Title: Public Relations Manager
Interview Date: 2018/02/05 09:00:00
Interview Location: Room 101, Street 1
Contact Person: Lily
E-Mail: lili@ragic.com
Phone: 123-456-788

Save Remove this button

Reports



The Road to Mastery

Reports 1

You can generate reports from the data you have in your Ragic sheets.



Dashboard Report



Line Graph



Ranking Report



Calendar



Pivot Table



Gantt Chart



To do list



Grouping Report



Label Maker



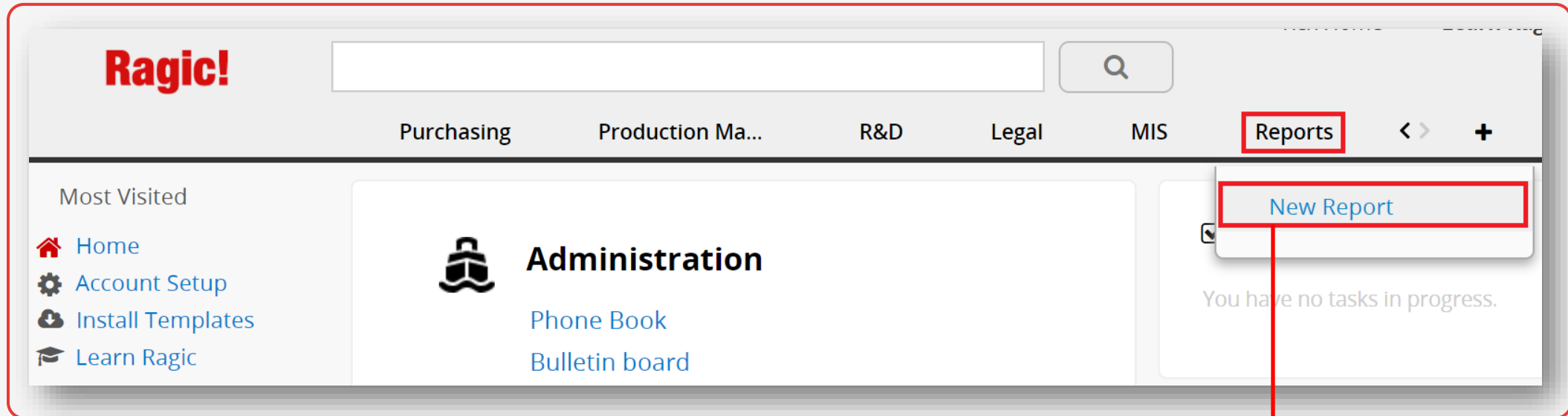
Kanban Board



Address mapping

Reports 2

You can generate reports from the data you have in your Ragic sheets.



- 1 Option 1: Create new report from "Reports Tab"

Reports 3

You can generate reports from the data you have in your Ragic sheets.

The screenshot shows the Ragic interface with a 'Sales Order' form. The form is divided into two sections: 'Order Information' and 'Customer Information'. The 'Order Information' section includes fields for 'Sales Order #' (SO-20180308-002) and 'Sales Order Date' (2018/03/08). The 'Customer Information' section includes fields for '*Customer ID', 'Customer Name' (Ragic, Inc.), 'Phone' (886-668-037), 'Mobile', and 'E-mail' (amy@ragic.com.tw). A 'Reports' dropdown menu is open, showing options: Dashboard Report, Ranking Report, Pivot Table, To do list, Label Maker, Address mapping, Line Graph, and Calendar. A red arrow points from the 'Calendar' option to the text below.

Order Information	
Sales Order #	SO-20180308-002
Sales Order Date	2018/03/08

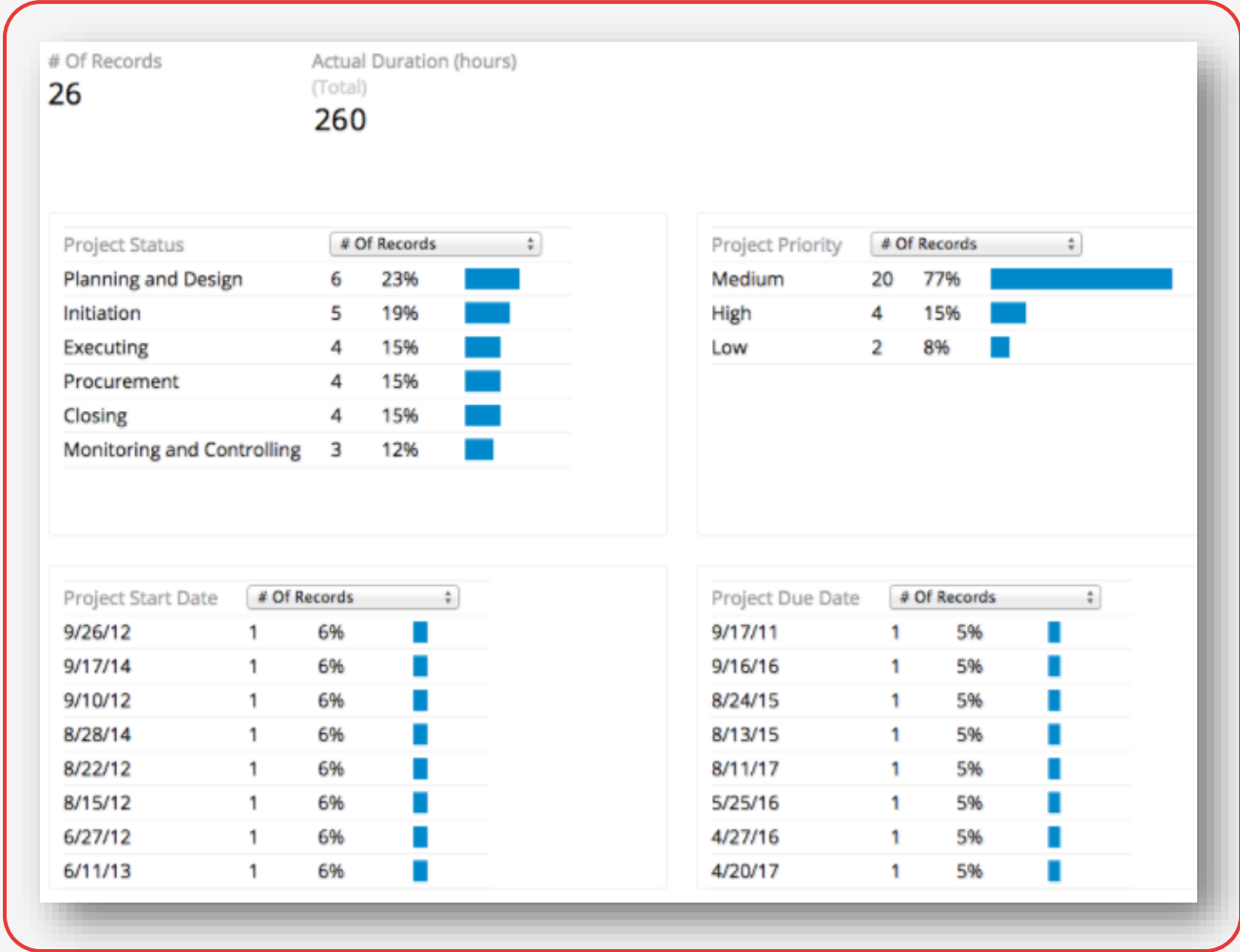
Customer Information	
*Customer ID	
Customer Name	Ragic, Inc.
Phone	886-668-037
Mobile	
E-mail	amy@ragic.com.tw

- Dashboard Report
- Ranking Report
- Pivot Table
- To do list
- Label Maker
- Address mapping
- Line Graph
- Calendar

1 Option 2: Create new report in your sheet

Reports 4

Dashboard Report



Reports 5

Ranking Report

Customer Name	Total		% Total
1. Willie Engelhardt	\$23,006.58		21.66%
2. Martin Corson	\$14,028		13.21%
3. Rosalie Lopez	\$12,827		12.08%
4. Eric Molina	\$10,890.8		10.25%
5. Daniel Grant	\$9,058		8.53%
6. Leona Lillard	\$7,840		7.38%

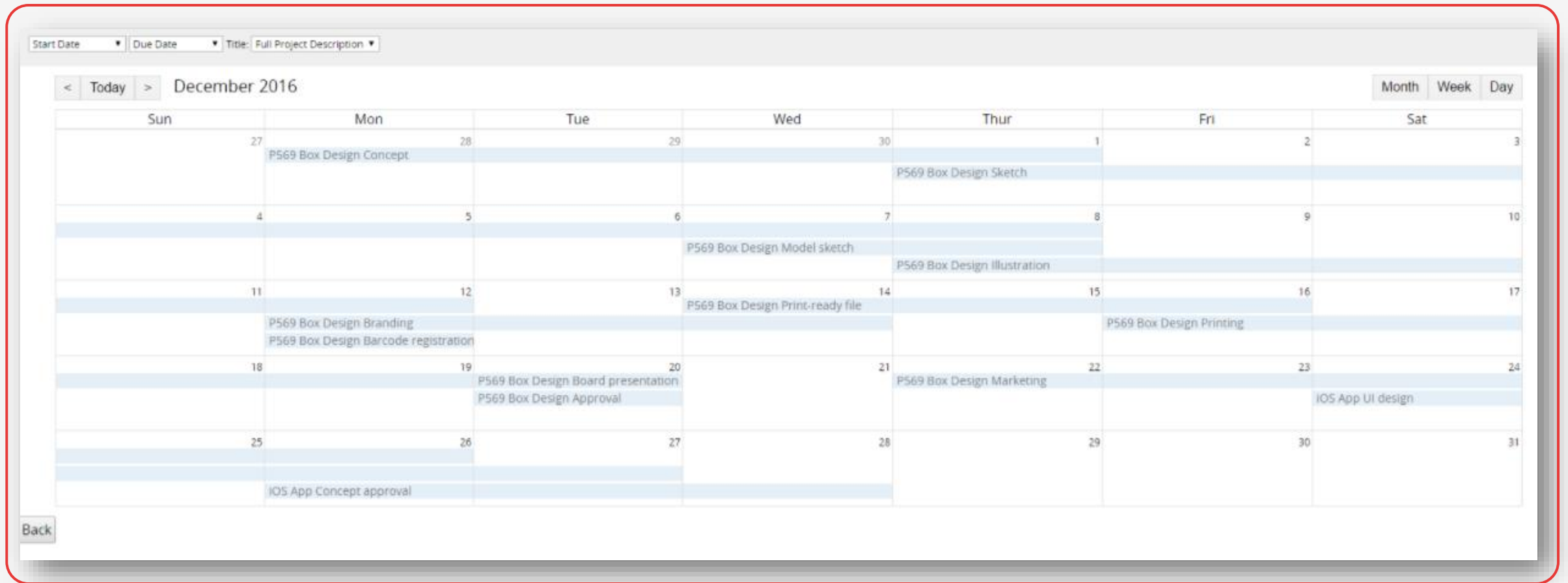
Reports 6

Pivot Table

Purchase Order Value ▾	Payment Status ▾		
Sales Order Source ▾	Paid	In Progress	Total
Yahoo Marketplace	£123,258	£0	£123,258
Amazon	£210,791	£12,818	£223,609
Facebook Campaign	£108,599	£772	£109,371
Twitter Campaign	£82,631	£4,153	£86,784
E-mail Campaign	£152,394	£10,514	£162,908
PR Events	£126,703	£10,631	£137,334
Sales Partners	£110,871	£4,824	£115,695
Physical Shop	£84,081	£8,310	£92,391
Workshops	£80,754	£6,693	£87,447
Total	£1,080,082	£58,715	£1,138,797

Reports 7

Calendar



Reports 8

To-do List

Shipping Date					
<input type="checkbox"/>	SO-00385	Cust-01247	Daniel Grant	2015/01/21	750
<input checked="" type="checkbox"/>	SO-00382	Cust-01235	Martin Corson	2015/01/21	3230
<input type="checkbox"/>	SO-00381	Cust-01223	Teresa Hopkins	2015/01/21	1000
<input checked="" type="checkbox"/>	SO-00379	Cust-01235	Martin Corson	2015/01/21	1100
<input type="checkbox"/>	SO-00377	Cust-01243	Terry Tutt	2015/01/21	550

5 Items





Back

Reports 9

Label Maker

● Label Field: Product Name Font Size: 2.8 mm Indent: 0 Align: center Width: 60 mm Height: 25 mm Update

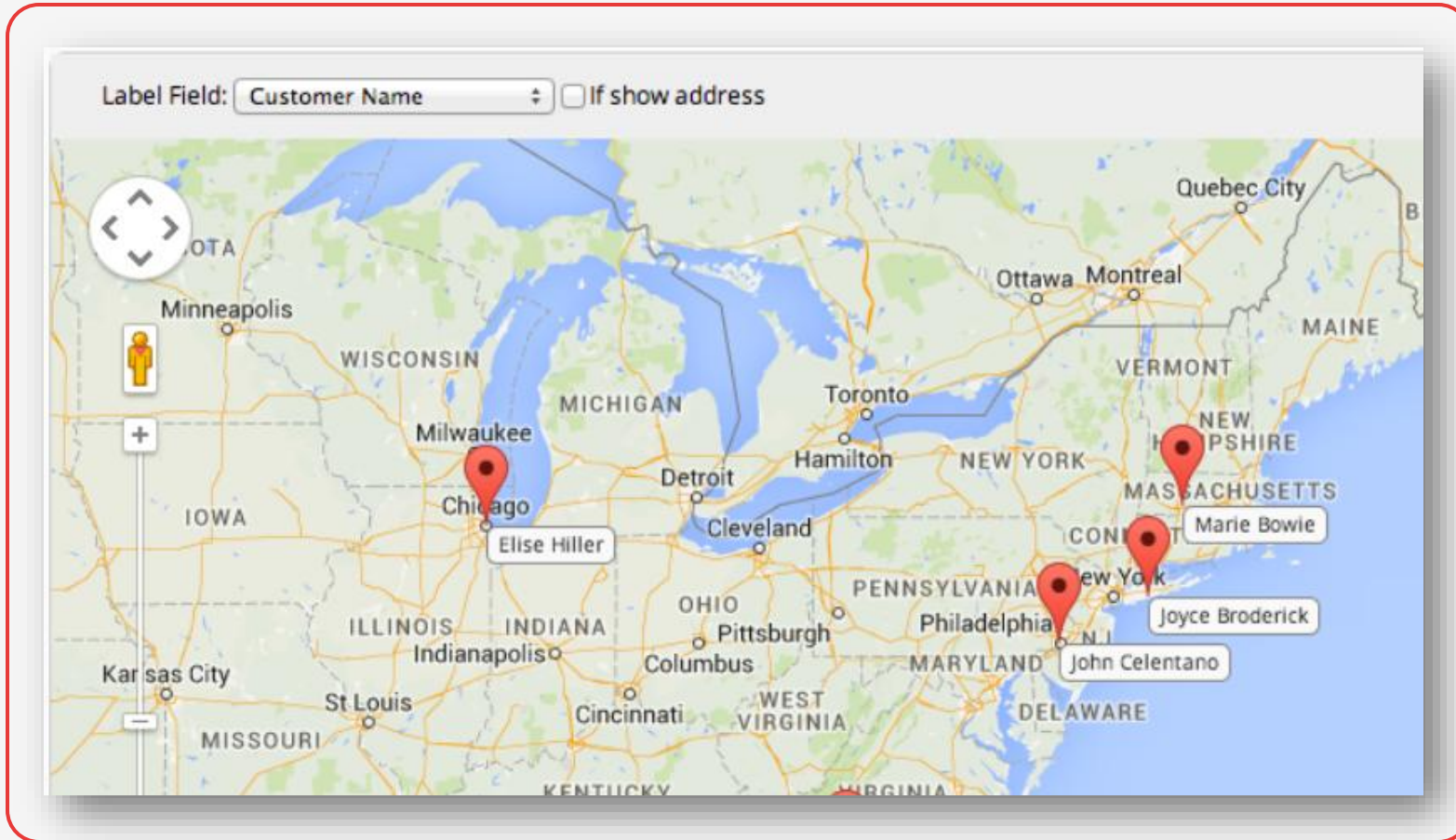
● Label Field: Barcode Font Size: 2.8 mm Indent: 0 Align: center Wrap: Yes

Cami Top	Canvas	Jacket	Jacket - Online Limited
 CC0X53023	 SC0439949	 PJ2303342	 PJ2303302

Back

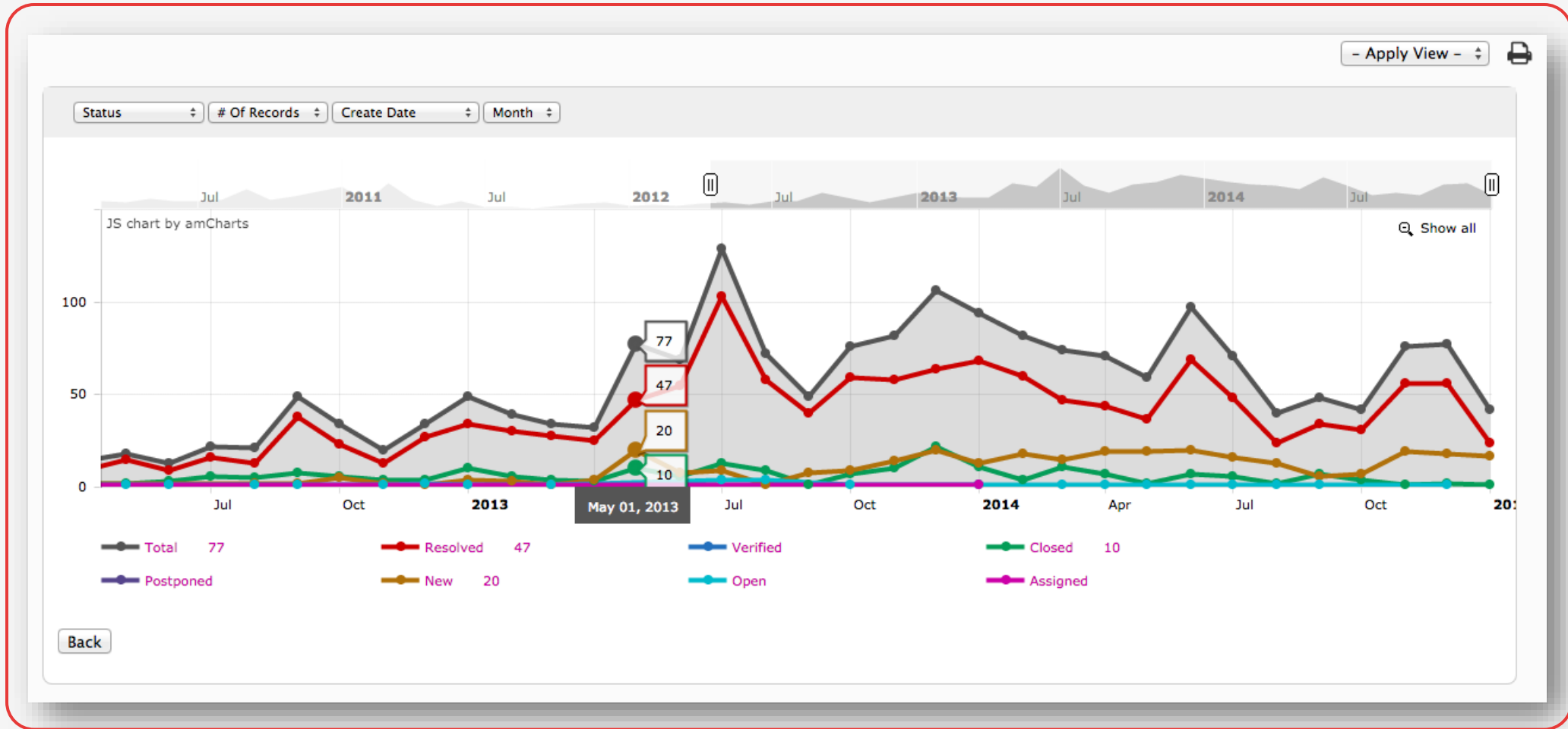
Reports 10

Address Mapping



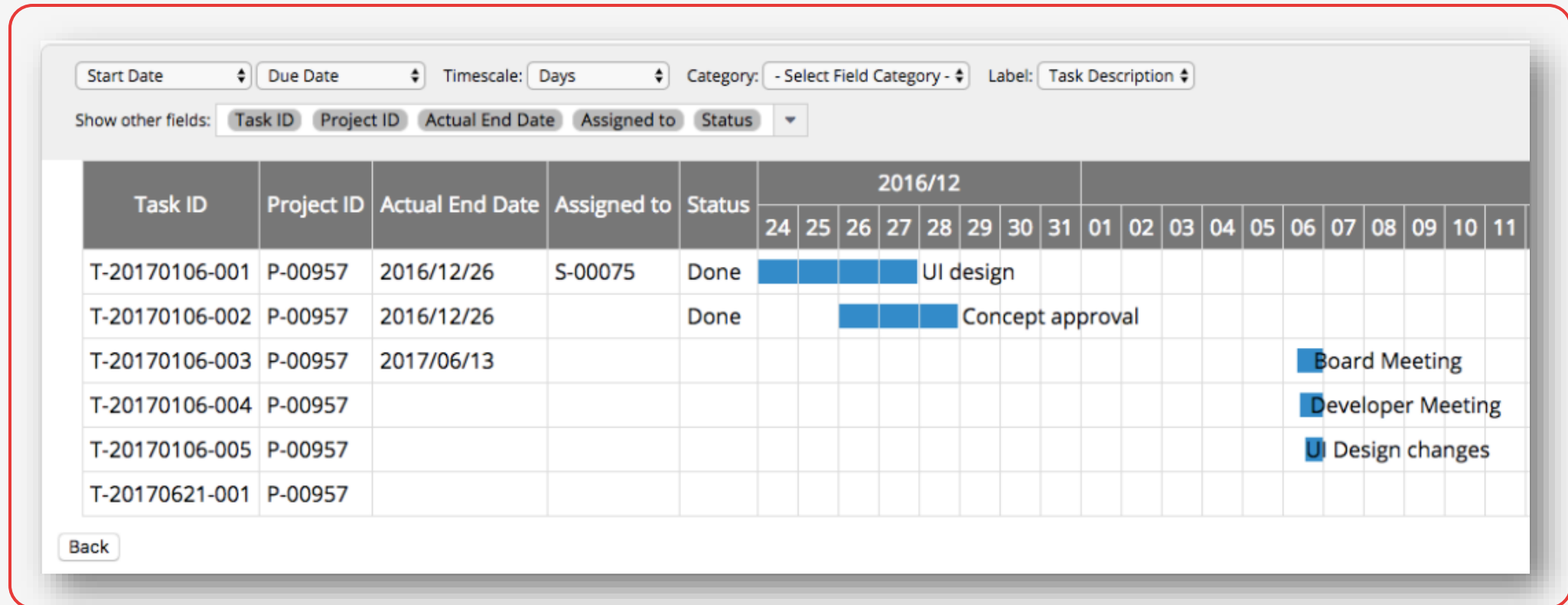
Reports 11

Line Graph






Reports 12

Gantt Chart



Reports 13

Grouping Report

Grouping Fields: Product Family    Create Report

Chewing Gum

Product Code	Product Name	Manufacturer	Product Family	Unit Price	Country of Origin
331329	Bright White Chewing Gum	Igley's	Chewing Gum	3	United States
331328	Pure White Chewing Gum	Igley's	Chewing Gum	3	United States
331327	Mint Chewing Gum	Igley's	Chewing Gum	3	United States
331326	Chocolate Flavoured	Igley's	Chewing Gum	2	United States
331325	Banana Flavoured Chewing Gum	Igley's	Chewing Gum	3	United States
331324	Double Mint Chewing Gum	Igley's	Chewing Gum	3	United States
-	-	-	-	17	-

Chocolate

Product Code	Product Name	Manufacturer	Product Family	Unit Price	Country of Origin
331347	Swiss Milk Chocolate	Igley's	Chocolate	3.29	Switzerland
331346	Assorted Chocolate Box	LaChocolaterie	Chocolate	23	Belgium
331345	White Chocolates	LaChocolaterie	Chocolate	9	Belgium
331344	Bitter Chocolate	LaChocolaterie	Chocolate	10	Belgium
331343	Bitter Chocolate %75	LaChocolaterie	Chocolate	17	Belgium
331342	Bitter Chocolate %90	LaChocolaterie	Chocolate	19	Belgium
331341	Milk Chocolate	LaChocolaterie	Chocolate	12	Belgium
-	-	-	-	90	-

Database settings



Database settings 1

Customizing Ragic for your Company

The image shows a two-step process for navigating to the Company Setting page in the Ragic! Administration interface. On the left, the 'Ragic!' logo is at the top left. Below it are two tabs: 'Start' and 'Administration'. Under 'Administration', there is a list of menu items: 'Install Templates', 'Learn Ragic', 'Account Setup', and 'Your organization profile on Ragic'. The 'Account Setup' item is highlighted with a red box. Below this list is another menu section with items like 'Users', 'External Users', 'Groups', 'Access Rights', 'Account Billing', 'Backup & Restore', 'Recent Changes', 'Job Schedules', 'DB Maintenance', 'Company Setting', 'Feature Settings', 'Global Constants', 'Notifications', and 'UI Translations'. The 'Company Setting' item is also highlighted with a red box. An orange arrow points from the 'Company Setting' item to the right-hand screenshot.

The right-hand screenshot shows the 'Company Setting' page. It has a title 'Company Setting' and a subtitle 'Your organization profile on Ragic.'. Below the subtitle are two main sections: 'Company Information' and 'Customization Settings'. The 'Company Information' section includes a field for 'Organization Name'. The 'Customization Settings' section includes a table of settings:

Customization Settings	
Logo	Document Link: Setting up a Custom Logo
Custom banner	Dark Banner? N
Company domain	Document Link: Setting up a Custom Company Dom
Allow auto login	Yes
Login banner	Document Link: Setting up a Custom Login Screen
Login logo	Document Link: Setting up a Custom Login Screen
Login page greeting 1	Document Link: Setting up a Custom Login Screen
Login page greeting 2	Document Link: Setting up a Custom Login Screen
Custom splash screen	Document Link: Setting up a Custom Splash Screen
Page after logout	

Database settings 2

Custom Logo

The screenshot displays the 'Company Setting' interface. It is divided into two main sections: 'Company Information' and 'Customization Settings'. The 'Customization Settings' section is highlighted with a red border and includes the following items:

Setting	Value	Document Link
Logo	[Input field]	Setting up a Custom Logo
Custom banner	[Input field]	Dark Banner? N
Company domain	[Input field]	Setting up a Custom Comp
Allow auto login	Yes	

Below the settings, a visual transformation is shown. A blue arrow points from the 'Ragic!' logo on the left to the 'INITECH' logo on the right. The 'INITECH' logo is a stylized green and black icon above the text 'INITECH'. The application header on the right also includes a 'Start' button, a 'Reports' link, and a '+' icon.

Database settings 3

Custom Banner

Company Setting

Your organization profile on Ragic.

Company Information	
Organization Name	

Customization Settings	
Logo	Document Link: Setting up a Custom Logo
Custom banner	Dark Banner? N Document Link: Setting up a Custom Banner
Company domain	Document Link: Setting up a Custom Company Domain
Allow auto login	Yes
Login banner	




Database settings 4

Custom Login Screen

Company Setting

Your organization profile on Ragic.

Organization Name	
Logo	
Custom banner	
Company domain	
Allow auto login	Yes
Login banner	
Login logo	
Login page greeting 1	
Login page greeting 2	
Custom splash screen	
Page after logout	




INITECH

E-mail:

Password:

[Log In](#) Remember me on this computer.

[Forget Password](#) | [Open id login](#)



INITECH

Initech Software Project Database

Please login to access your assigned software projects.

[Document Link: Setting up a Custom Login Screen](#)

[Document Link: Setting up a Custom Login Screen](#)

[Document Link: Setting up a Custom Splash Screen](#)

Database settings 5

The screenshot shows the Ragic! web interface. At the top left is the Ragic! logo. A search bar is located at the top right. Below the logo is a navigation menu with tabs: Start, Order & Billing, Purchasing & In..., HR, Sales, and Project Manage... The left sidebar contains a list of settings categories: Account Setup, Users, External Users, Groups, Access Rights, Account Billing (highlighted with a red box), Backup & Restore, Recent Changes, DB Maintenance, Company Setting, Feature Settings, Notifications, UI Translations, and Recycle Bin. The main content area is titled 'Account Update' and contains the following settings:

- Plan: Professional (dropdown menu with 'Compare plans' link)
- Billing cycle: Monthly (dropdown menu)
- Next billing date: 2017/4/15
- Number of Users: 20 (input field) with 'Active Users: 20' text below it
- Amount: \$380.00 (USD)
- Billing Contact E-mail: blumbergh@initech.com (input field)

On the right side of the 'Account Update' section, there are several links: Add SMS Credits, Add Storage Space, Cancel Subscription, Update Credit Card, and Billing History. At the bottom of the 'Account Update' section is a red button labeled 'Update my account >>'.

Database settings 6

Backup and Restore

The screenshot displays the Ragic! database management interface. The top navigation bar includes 'Start', 'Administration', 'Marketing', and 'Project Budget ...'. The left sidebar lists various settings, with 'Backup & Restore' highlighted in a red box. The main content area is titled 'Ragic Data Management' and features a 'Backup & Restore' section with a green folder icon containing a download arrow. Below this, there are links for 'Backups' and 'Restore'. A 'Storage Space' section provides usage statistics: 'Data Storage: 7.8MB Used Your quota : 1GB' and 'File Storage: 5.5MB Used Your quota : 2GB'. A link 'Get More Storage Space' is also present.

Ragic!

Start Administration Marketing Project Budget ... P

Account Setup

- Users
- External Users
- Groups
- Access Rights
- Account Billing
- Backup & Restore**
- Recent Changes
- Job Schedules
- DB Maintenance
- Company Setting
- Feature Settings
- Global Constants
- Notifications

Ragic Data Management

Backup & Restore

Backups
Restore

Storage Space

Data Storage: 7.8MB Used Your quota : 1GB
File Storage: 5.5MB Used Your quota : 2GB

[Get More Storage Space](#)

Backup

Download backup of the DB of your account:

Your DB may stop responding for a few seconds during the backup process.

Backup database definition only.

Exclude uploaded files.

Backup

Database settings 8

Restore

Restore

Upload and restore a backup of your account:

All the data in your account will be overwritten after you restore.

Choose File No file chosen

Upload

1 Choose backup file

2 Upload


Online support



Online resources


Rex Home ▾ **Learn Ragic** ▾ Need Help?

RESOURCES

- Learning Center
- Database Design Document**
- User Document** (For your end users)
- Introducing Ragic to your team (Slides)
- HTTP API Integration
- Glossary
- Blog** 
- What's New?

IMPORTANT CONCEPTS

- Listing & Form
- Subtables
- Formulas
- Link & Load
- Multiple Versions
- Mass Editing
- FAQ

☑ 

1 Documents

2 Blog and Social Media

Customer support 1

Ragic Bot

1 Lower right corner

2 Ask a question with keywords

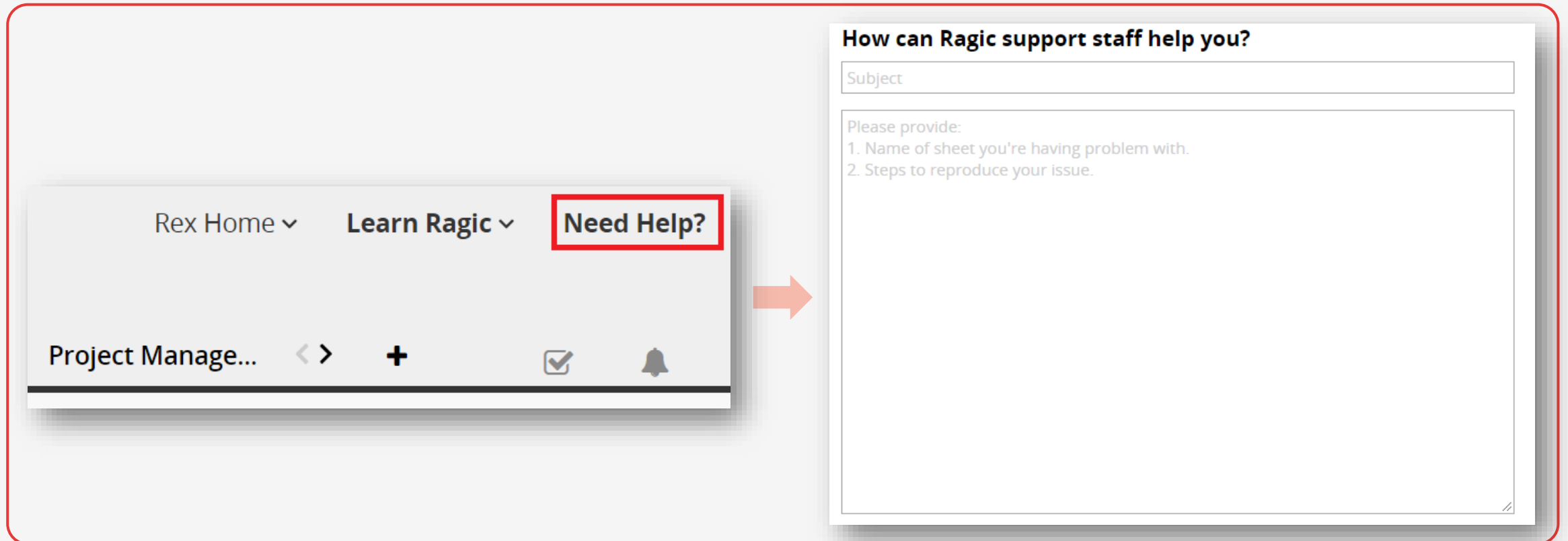
The diagram illustrates the process of accessing customer support. It starts with a website's lower right corner, where a red 'Support Chat' button is located. Clicking this button leads to a chat interface titled 'Ragic Bot'. The chat window shows a conversation where the bot asks, 'OK, go ahead. Remember to include keywords.' in response to a user's question. The user then asks, 'how to use link and load'. The bot responds with, 'Is your question about "Link & load"?' and provides buttons for 'Yes', 'No', and 'Leave a message'. A 'Yes' button is also visible at the bottom right of the chat window.

Customer support 2

Contact Support

1 Upper right corner

2 Provide URL and describe the problem you are facing



The image shows a screenshot of a web application interface. In the upper right corner, there is a navigation bar with three items: 'Rex Home' with a dropdown arrow, 'Learn Ragic' with a dropdown arrow, and 'Need Help?' which is highlighted with a red rectangular box. Below this navigation bar, there is a secondary bar with 'Project Manage...' followed by navigation icons: a left arrow, a right arrow, a plus sign, a checkmark, and a bell icon. An orange arrow points from the 'Need Help?' button to a support form on the right. The support form is titled 'How can Ragic support staff help you?' and contains a 'Subject' input field, followed by a text area with the prompt 'Please provide:' and two numbered instructions: '1. Name of sheet you're having problem with.' and '2. Steps to reproduce your issue.'

Ragjic!