

Professional

**\$16** \$24  
USD/user/month

- Start from 5 users
- Includes all basic features

Custom

**\$20** \$28  
USD/user/month

- Start from 5 users
- Includes all basic features
- Advanced customization options

Offer available exclusively for first-time subscribers.

## Get a personalized demo

Meet our specialist to discuss your challenges and learn how Kintone can help.



Contact Us



# Kintone Handbook

Build Custom Solutions for Your Work

Trusted by over  
40,000+ Customers



50+ Free  
App Templates



Streamline  
Your Sales  
Operations



Reliable  
Customer Support



## What is Kintone?



**Kintone is a sales management system. It centralizes customer data and activity history, all without needing IT staff.**

## Customer's Voice

Users of Kintone have shared positive feedback regarding the platform's flexibility and user-friendly interface



**Increased leads by 15 times**



**Complete 90 minutes of work in 5 minutes**



**Improved collaboration**

"Transitioning from chaotic spreadsheets to Kintone allowed us to centralize and visualize our sales data, empowering us to drive business growth."

"With Kintone, we were able to eliminate errors and repetitive data entry by streamlining our processes, cutting down sales prep time from 90 minutes to just 5 minutes."

"Kintone's centralized platform enables real-time data management, allowing us to easily and quickly share information across multiple departments, ensuring everyone is on the same page."

**Trusted by over 40,000+ leading companies around the world**

SEIKO

gojek

MINISTOP

House 好侍

PERSOL KELLY

TOTO

TEIJIN

Aeon Fantasy

Roland

### Industry-wide recognition



Recognized as a leader based on high ratings for customer satisfaction and market presence.



Recognized for providing the best customer support especially among mid-sized businesses.



Recognized for providing the most user-friendly and intuitive product based on customer reviews.



Recognized for providing the best-in-class customer support based on user reviews.

# Common Sales Problems Kintone Can Solve



### Struggling with Excel Overload and WhatsApp Chaos?

Are you tired of slow, confusing Excel files and scattered customer conversations across personal WhatsApp accounts?

See p.3



### CRM & Sales Lead Management

Are duplicated tasks, inconsistent project tracking, and person-dependent processes preventing your team from seeing the full picture of each deal?

See p.5



### Approval Workflows

Do you have to be in the office to approve requests? Are you juggling requests coming in from multiple sources?

See p.7



### Order Management and Invoicing

Is inefficient communication slowing you down?

See p.9

### 1 Excel Files That Are Slow to Load or Hard to Manage Due to Difficulty in Identifying the Latest Version

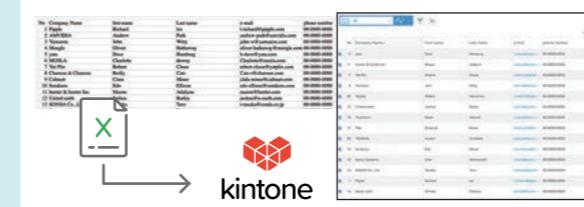


- Too slow to load
- Too many versions
- Key-person dependency

As Excel files grow bigger with more data, so do the delays they cause due to slow loading or difficulties in identifying the latest version. Excel files managed by a few key team members prevent efficient information sharing.

### Build a Kintone App Your Team Can Edit, Share, and Manage Together

Upload your Excel files to turn them into apps



Simply upload your Excel files to build Kintone apps tailored to your needs.

Share the latest data in real-time



Centrally managed data in the Cloud gives your team quick access to the latest data and visibility into what needs to be done.

### 2 Time-Consuming Data Aggregation



- Various formats
- Time-consuming data aggregation

Sales reps often waste time compiling reports instead of focusing on customers and closing deals.

### Streamline Data Aggregation with Standardized Formats

Capture and manage data in a standardized format



Whether you are on your PC or smartphone, standardized formats ensure a consistent level of data granularity across devices.

Visualized reports bring clarity to the overall progress



Real-time data aggregation

You can set filter conditions and turn your stored data into graphs. Graphs automatically reflect the latest data, eliminating the need to redo reports or analyses for every data update.

### 3 Communication Mishaps

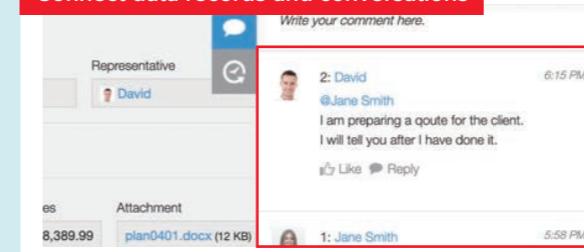


- Missed communications
- Miscommunications
- Key-person dependency

Too many messages cause missed replies, and sharing Excel files through separate tools like email or chat scatters information and increases miscommunication.

### Boost Your Productivity by Keeping All Relevant Information and Communication on Kintone's All-in-One Workplace Platform

Connect data records and conversations



Write your comments alongside the data you're discussing, keeping relevant information in one place.

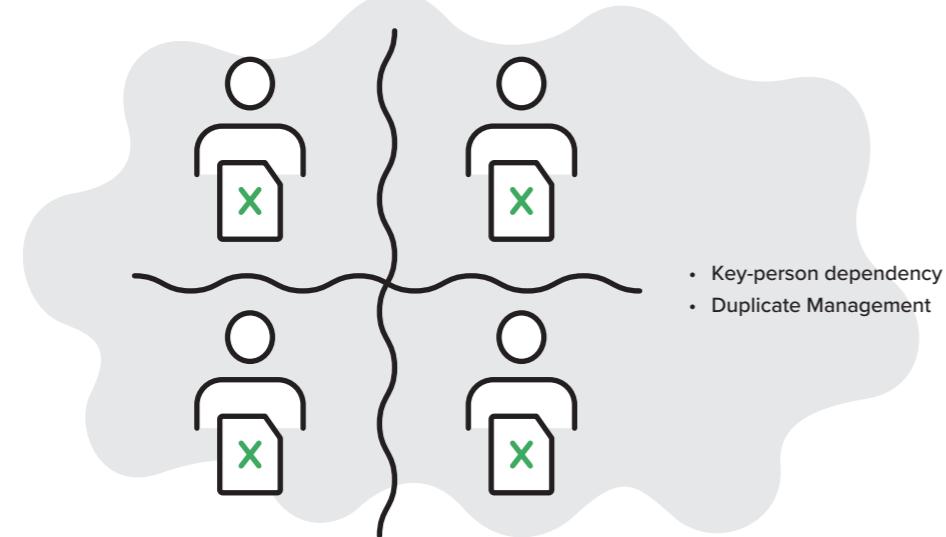
Connect data records, assigned members, and task statuses



Person in charge: Clinton      Person in charge: Manager      Person in charge: MAX

Link tasks with assigned members and statuses to track your specific workflows. This helps visualize your workflows, ensuring that no tasks are forgotten.

## 1 Key-Person Dependency & Duplicate Management



- Key-person dependency
- Duplicate Management

Managing customer data, leads, and activity logs in Excel files or personal planners hinders real-time information sharing - even with team members nearby - and delays business operations. When customer communication depends on personal WhatsApp accounts, important updates get lost when the person is unavailable.

## Manage Both Data and Relevant Discussions in One Central Workspace, Eliminating Key-Person Dependency and Duplicate Management

Search for everything from data records to the contents of attachments using full-text search

Connect conversations to data records

Write your comment here.

Representative: David

Attachment: plan0401.docx (12 KB)

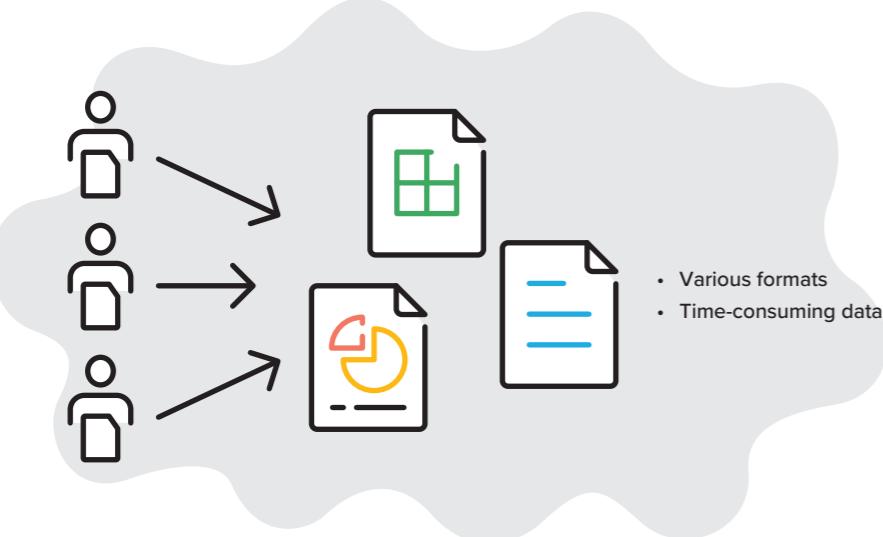
Data record

2: David @Jane Smith I am preparing a quote for the client. I will tell you after I have done it. Like Reply 6:15 PM

1: Jane Smith @David How is your progress? Like Reply 5:58 PM

Communication

## 2 Poor Visibility Into the Big Picture



- Various formats
- Time-consuming data aggregation

Various formats, slow-loading Excel files, and confusion over the latest version delay the data aggregation process and overall project progress, which can potentially cost you business opportunities. Without a centralized view, sales managers lose track of customer engagement, and scattered data makes searching inefficient.

## Get a Big Picture View with Standardized Formats

Track progress with quick reporting

Create graphs using real-time data

Customer Database

Create graphs instantly

All Customers View

My Customers

Potential Customers

Alphabetical

By Product

(All fields)

Set condition filters to display the record details your team needs

Number of records

Number of customers

Marketing

Department

Contact Name

Address

Andrew

2-7-1 South

Kyle

23461 East

Tom

92481 Main

Sasha

2-9-12 West

Kathleen

311 North St

David

23461 River

Set filter conditions and turn your data into graphs. Graphs automatically reflect the latest data, eliminating the need to redo reports or analyses for every data update.

You can specify detailed filter conditions to display data records you need in the list. Filter conditions can be saved for quick access the next time you need to view the same records.

### 1 Work Requests Coming in from Different Sources Risk Being Overlooked or Processed More than Once



- Double handling
- Overlooked requests

Work requests coming in from different channels such as Excel, email, WhatsApp, and phone are prone to being overlooked or processed more than once.

### Centralize All of Your Work Requests in One Place and Track Statuses and Assigned Members

Nothing gets overlooked with status updates				
Date and time	Status	Inquiry Type	Organization Name	Contact Name
Apr 15, 2021 12:23 PM	Not handled yet	Partnership	Example	Joseph
Apr 14, 2021 6:38 PM	Complete	Sales Inquiry	Corporation Sample	Andrew
Apr 13, 2021 1:08 PM	Not handled yet	Support	Sample B	Tom
Apr 13, 2021 9:30 AM	Complete	Sales Inquiry	Example	Joseph

**One-click approvals**

No more hunting through Excel sheets, emails, and WhatsApp messages. Centralize all work requests on Kintone and easily monitor progress and accountability, ensuring nothing is overlooked.

Discuss and approve the request on the same page at the click of a button.

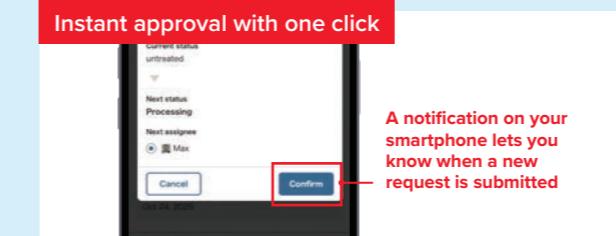
### 2 Managers Cannot Grant Approvals or Search for Past Requests Outside the Office



- Mountain of paper documents
- Not accessible from outside the office
- The approval process stops when the manager is away from the office

Approval workflows involving paper and physical signatures can't move forward when the manager is out of the office. Searching for past requests is time-consuming.

### One-Click Approvals, Anytime Quick Search for Previous Requests



Real-time smartphone notifications ensure that urgent requests are addressed. Approve requests with a single click, leaving no request unprocessed, even when you're away on a business trip.

**Easy to search for previous requests**

You can quickly search for past requests stored in your Kintone app, including the content of attached files.

### 3 The Current System Does Not Adapt to the Team's Workflows and Is Not User Friendly



- Not user friendly
- Not customizable

Requests are processed by a non-customizable system that does not adapt to company-specific details and approval workflows. Outsourcing system modifications takes time.

### Drag-and-Drop Your Way to Custom Workflows and Stay On Top of Any Work Requests

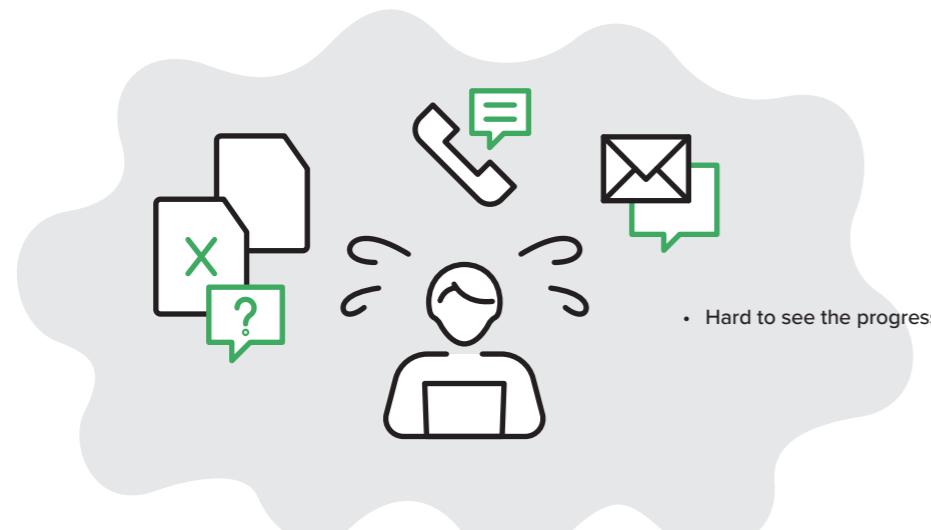


Kintone's drag-and-drop interface lets you design an app as intuitively as drawing on paper. You can quickly update an app to reflect the team's feedback, ensuring a stress-free data entry experience for your team.

**50+ ready-to-use sample apps**

50+ ready-to-use sample apps. Kintone offers solutions for all kinds of approval workflows.

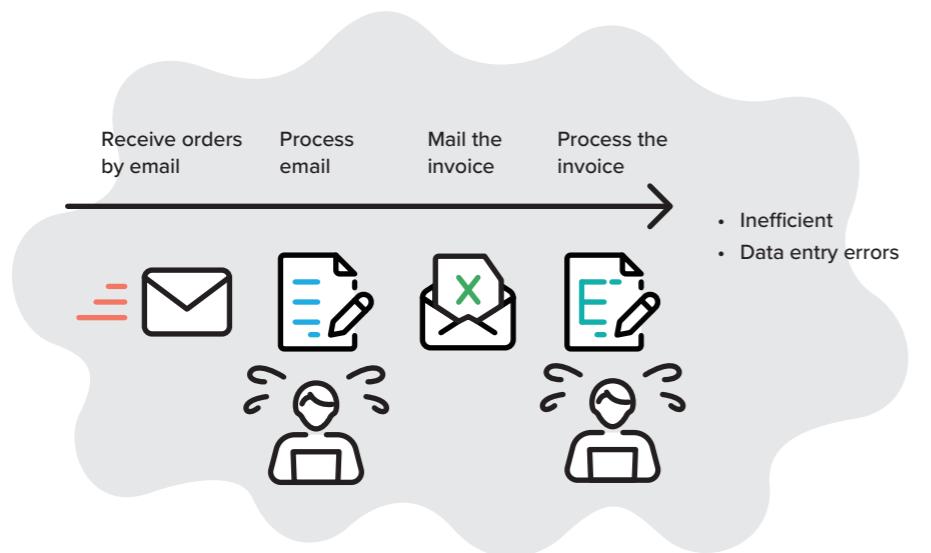
## 1 Scattered Information Obscures the Overall Progress



Limited visibility into who is working on what may cause unexpected issues.

### Supercharge your efficiency with Extensions

## 2 Complicated Workflows and Communication Channels Reduce Efficiency and Cause Data Entry Errors



Productivity suffers due to a complex and inefficient order management process that uses emails for receiving orders and Excel sheets for generating order forms. Some data may be missed or overlooked in the data entry process.

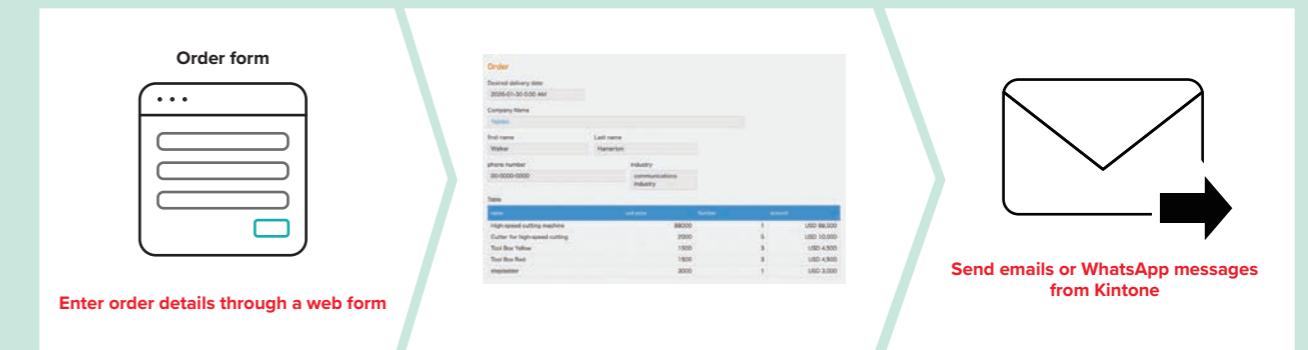
## Capture Data in Standardized Formats and Track Overall Progress and Who Needs to Take Action

Nothing gets overlooked with status updates				
Date and time	Status	Inquiry Type	Organization Name	Contact Name
Apr 15, 2021 12:23 PM	Not handled yet	Partnership	Example	Joseph
Apr 14, 2021 6:38 PM	Complete	Sales Inquiry	Corporation Sample	Andrew
Apr 13, 2021 1:06 PM	Not handled yet	Support	Sample B	Tom
Apr 13, 2021 9:30 AM	Complete	Sales Inquiry	Example	Joseph
Apr 12, 2021 10:00 AM	In progress	Sales Inquiry	Corporation Sample	Andrew
Apr 06, 2021 11:30 AM	In progress	Sales Inquiry	Corporation Sample	Andrew

No more hunting through Excel sheets, emails, and fax messages. Centralize all work requests on Kintone and easily monitor progress and accountability, ensuring nothing is overlooked.

Discuss the details about an order or invoice on the same screen. You can grant approvals with one click.

## Streamline your operation into one platform



With Kintone, you can integrate with web form services to receive orders and centralize your data and operations in one place.

This eliminates manual data entry errors and significantly boosts your team's efficiency by reducing administrative workload.

\*Web forms are available through third-party services and require integration with Kintone.

## Transform your data into professional documents with just one click

Instantly generate documents such as quotes, invoices, contracts, and more — eliminating hours of manual preparation.

\*Document merging functionality is included with the Kintone Custom plan or can be added via extension. For details on the Kintone Custom plan, see page 13.

# What Kintone Can do For You

- Customize to include only the features you need

Kintone allows you to select plans and options based on your required features and budget, ensuring there are no redundant or overly complex functions.



- Affordable, fast to launch, with support tailored on site

Kintone delivers simple, budget-friendly deployment, backed by local experts who fine-tune the solution on site to fit your unique workflows and challenges.



- Start with CRM, expand possibilities

Kintone enables a practical first step with CRM and can be extended to broader use cases in the future, ensuring growth that matches your organization's pace



## How Kintone works

Kintone brings your data, workflows, and communication together in one place to streamline and optimize your team's operations.

The diagram shows three main components integrated into Kintone:

- Database:** Represented by a yellow cylinder icon. It shows a screenshot of a Kintone database table with columns for 'Expected Close Date', 'Deal Name', 'Rep', 'Sales Stage', 'Forecast Value', and 'Signed Contract Value'. A green callout bubble labeled 'Workflow Approval' points to a screenshot of a workflow approval interface.
- Workflow Approval:** Represented by a green rounded rectangle icon. It shows a screenshot of a workflow approval screen with a 'Next Status' dropdown set to 'In progress', a 'Cancel' button, and a 'Confirm' button. A green callout bubble labeled 'Database' points to the database table.
- Communication:** Represented by a red rounded rectangle icon. It shows a screenshot of a Kintone messaging interface with a list of messages between users 'Maxwell' and 'Gauss'. A red callout bubble labeled 'Database' points to the database table.

# Going Beyond Sales: Customize Kintone for Any Purpose

## Solutions for All Employees

### Internal Communication

- Notices & instructions
- Company portals
- Employee surveys

### Work Requests and Approvals

- Seal imprint requests
- Expense reports
- Attendance reports
- Internal proposals
- Business trip requests

### File Management

- Manuals
- Contracts

### Internal FAQ Management

- Knowledge base
- Employee help desk

### Third-Party Collaboration

- Project management
- Communication
- File sharing

## Solutions for Teams

### Sales & Customer Support

- Customer data management
- Lead management
- Quotation management
- Activity logs
- Customer inquiry
- Outbound call list

### HR & Admin

- Contract management
- Employee directory
- Recruitment management
- Onboarding & offboarding management
- Employee training content management

### Marketing

- Task management
- Event management
- Creative production management
- Outsourcing management

### IT Support

- Inquiry management
- Device management
- IT asset management
- Help desk

### Sales Admin

- Order management
- Invoicing management
- Shipment management

### Accounting & Finance

- Product management
- Inbound and outbound logistics management
- Inventory management
- Cost accounting

### Manufacturing & Production Planning

- Project management
- Production planning management
- Work records and results registration
- Resource tracking
- Evaluation management

## Do more with Kintone Custom to streamlines your work

Gain insights into daily performance using budget vs actual data



- Support accurate data entry
- Match and aggregate data from multiple apps
- Tabulate data automatically at the specified time

Real-time inventory tracking



- Automatically increase or decrease inventory across relevant apps

Get a quick overview of a project schedule and details



- Gantt chart view
- Side-by-side display of the record view and details

### Business Form Generation



Generate template-based PDFs containing registered data. Generated PDFs can be exported and edited in Excel.

### Account Statements



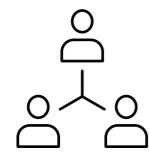
Export a set of documents with different layouts such as an invoice on one page and account statement on another.

### Sales Calculation



Calculate sales by product and purchases by supplier.

### Record Locking



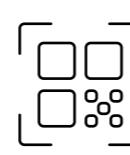
Lock your record to prevent other team members from editing it simultaneously.

### Maps



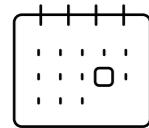
Add Google Maps and more to your Kintone apps.

### QR Code Scanner



Scan a QR code using your smartphone camera on Kintone's screen.

### Due Date Calculation



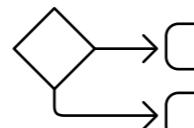
Easily calculate specific dates such as the end of next month or the end of this fiscal year.

### Byte Limits



Opt for byte limits over character limits to ensure seamless integrations with other solutions.

### Conditionally Required Fields



Define requirements based on conditions, such as making a field mandatory for a request form or requiring option selection for a specific plan.

## Plug-ins and Integration Services

### Further Expand What You Can Do with Kintone

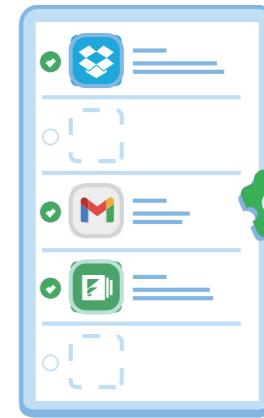
Upgrade your Kintone experience with one of many third-party integration services, including a wide selection of APIs and plugins.

#### Types of Extensions



#### Plug-ins

Plug-ins are packaged customization files that offer an easy way to further customize your Kintone platform setup without writing or altering code.



#### Third-Party Integrations

Third-party integrations let you extend Kintone's capabilities by connecting your Kintone platform with other software services you might already use.

#### Box

By Kintone  
Use Box to manage files in your Kintone domain.



#### Dropbox

By Kintone  
Use Dropbox to manage files in your Kintone domain.



#### HubSpot + Kintone

By Hubspot  
Sync data between Kintone and HubSpot without manual data entry or messy, time-consuming imports using Hubspot's Operations Hub.



#### Form Bridge

By TOYOKUMO  
Creating online surveys, questionnaires, registrations, applications, and more. Simply create your public-facing web form and map the fields to your Kintone database.



#### Gmail + Kintone

By Zapier  
Looking for a way to supply Kintone with information from your emails? Set up this Zap and we can track everything that hits your inbox or only a specific label on Gmail. It then will trigger with every new email that arrives according to your options, adding the information as a new record on Kintone automatically and reliably.



#### Google Calendar + Kintone

By Zapier  
Use your Google Calendar events data within your custom Kintone application. Google Calendar event data can be attached to client, employee, project, and other records within the Kintone platform.



...And More!

...And More!

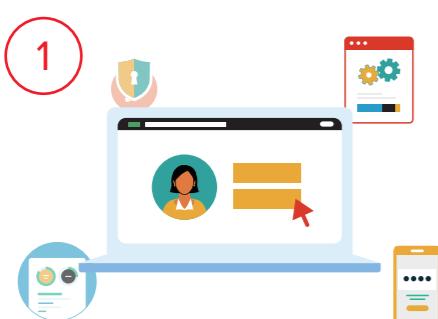
## — Security Matters

### Robust cloud infrastructure that provides safety and security for organizational information sharing.

Kintone is a customizable workplace platform that lets you manage your team's data, tasks, and communication in one central place.



#### • Security Features



#### Meticulous account management functionality

A variety of management functions are offered in order to keep user accounts secure.

- ✓ Account integration
- ✓ Features to prevent unauthorized access
- ✓ Activity log checking
- ✓ Access permission control



#### Highly reliable infrastructure operations

Kintone utilizes Amazon Web Services(AWS) hosting infrastructure.

Our services are geo-redundantly replicated across multiple availability zones for high availability and reliability

- ✓ Infrastructure
- ✓ Fault-tolerant measures
- ✓ Service Level Objective (SLO)
- ✓ Uptime percentages



#### Security protection initiatives

We have a team dedicated to protect customer security.

- ✓ Dedicated security incident response team
- ✓ Third-party security audits
- ✓ Security policy
- ✓ Cooperation with external parties

## — Support

### You Can Count On Our Customer Support Team Both Before and After Deploying Kintone.



#### Partners Available in Malaysia

Kintone's partner program helps teams speed up development and launch by handling the initial setup for you.



AsiaQuest Internet Malaysia Sdn.Bhd.



FUJIFILM Business Innovation Asia Pacific Pte Ltd (Malaysia Ops)

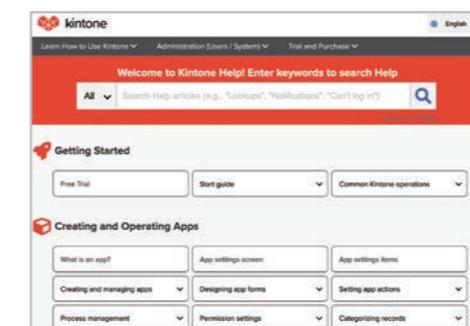


RM Applications Sdn Bhd (RMA)



Ricoh (Malaysia) Sdn.Bhd.

#### Rich Library of Learning Content



##### Help article

Help articles explain basic operations in a clear, written format. They are also searchable by keywords, making it easy for users to quickly find the information they need.



##### Tutorial video

Tutorial videos combine visuals and audio to help users easily understand even complex operations. They are also highly effective for driving adoption and usage within the organization.

Notes

Notes

