



Let's use it conveniently



basic guidebook

vol. 04

Lookup

Here, we'll use the "Order reception application" to explain the lookup field, which retrieves data from other applications!

Solve
common
problems!

It's a lot of work having to enter
client names and companies so
many times...

Can't I copy client and product
information and enter them more
efficiently?





Before implementing lookup





Order Management App

- Product names and unit prices were all entered manually
- Entering product information takes time
- People enter product names differently







Reception Date: 2016-03-30 Receptionist:  

 Yuta Sibutani 

Client: Department: Person:

E-mail: Telephone:

Product information was individually entered per order

Product code	Product name	Unit price	Quantity	Subtotal
<input type="text" value="K0001"/>	<input type="text" value="kintone lite corse"/>	<input type="text" value="780"/> YEN	<input type="text" value="100"/>	<input type="text" value="78000"/> YEN  
<input type="text" value="O0001"/>	<input type="text" value="office standard"/>	<input type="text" value="500"/> YEN	<input type="text"/>	<input type="text" value="#N/A!"/> YEN  

Total amount: YEN

After implementing lookup



Order Management App

- Copy from the product management application using **lookup**
- Faster entry!
- Eliminate entry errors and consolidate names!
- Related information, such as unit prices can be collectively copied!



Client: Bozu corporation
Department: Accounting
Person in charge:
E-mail: tanaka@bozu.co.jp
Telephone: 03-8765-4321

Lookup product codes from the product management application

Product code	Product name	Unit price	Quantity	Subtotal
K0001	kintone lite corse	780 YEN	100	78000 YEN
O0001	Office standard			N/A! YEN

Data lookup succeeded.

You can collectively copy other information, too!

Total amount



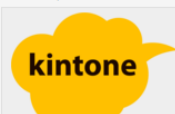
Product Management App

Product management

Product management > (All fields) > 1

Product code: K0001

Product name: kintone lite corse Unit price: 780

Related picture: 

How to set up lookup

When you set up “lookup,” you can copy necessary data from other applications.

For example, when you set lookup so that “order reception application” will reference the “product management application,” you can lookup product information and copy necessary data to the product reception application. You can reduce the effort necessary to enter data twice, and also prevent mistakes.

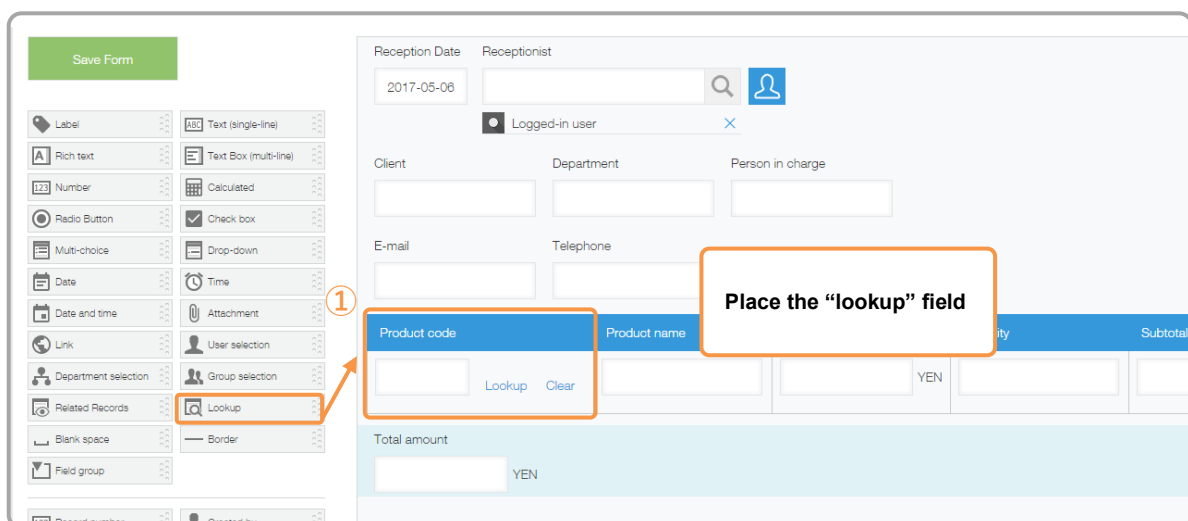
【Completed image】



1. Place the lookup field

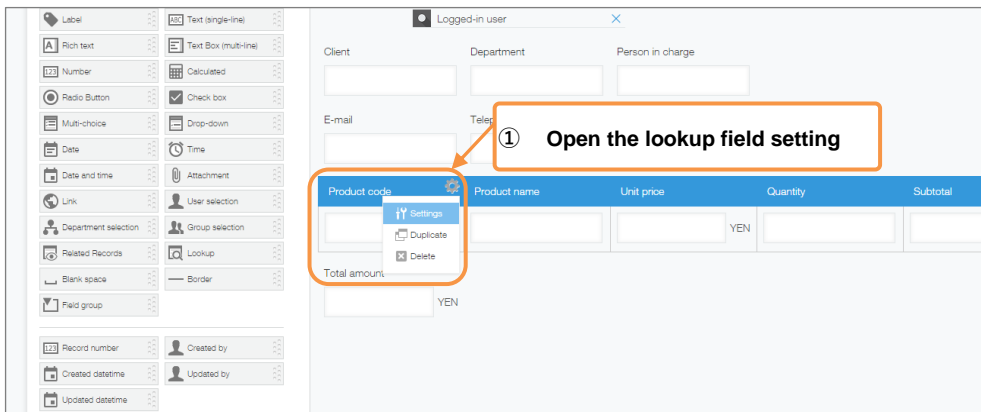
① Place the “lookup” field

Select [lookup] from the parts list on the left side of the screen, and drag it to the right. In this example, we will place lookup in the items where we will enter “**Product codes**”.



2. Set up the lookup field

① Open the “lookup field” settings screen



② Set up the field name

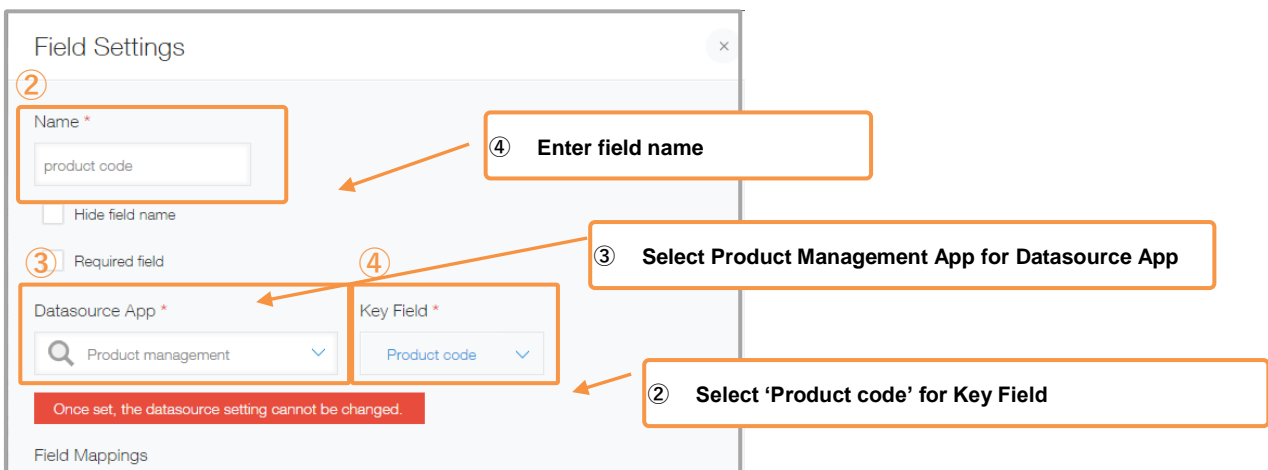
Change the field name to “product code.”

③ Select a “Datasource App”

Select the source app from where the data will be retrieved. In this example, we will select the [Product Management App].

④ Select a “Key Field”

Here, we will select the fields that will be used as related keys. In this example, we will select the [Product code] field.

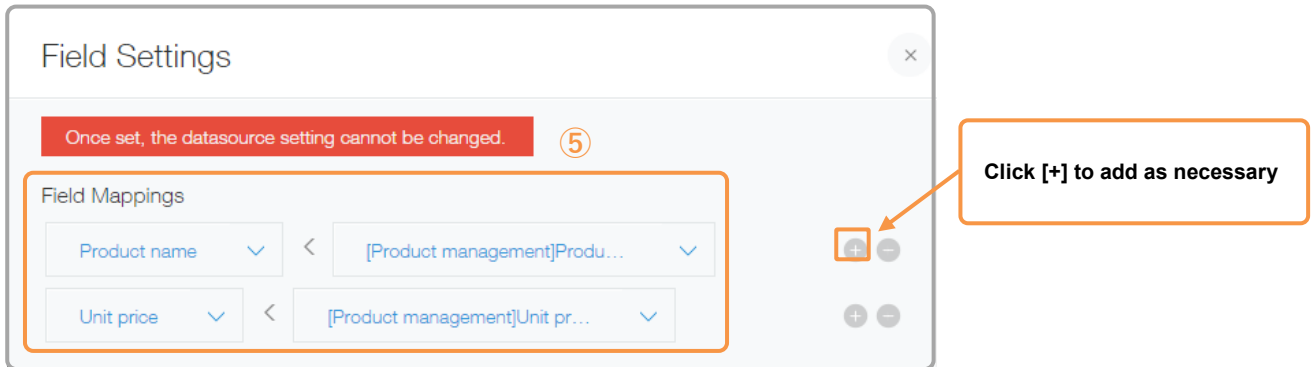


⑤ Select “Field Mappings”

You can collectively retrieve data in other fields from the lookup source record.

In this example, we will select **[Product name]<[[Product management] Product name]**, **[Unit price]<[[Product management] Unit price]**.

※Fields inside tables cannot be selected.



⑥ Select “Fields Shown in Lookup Picker”

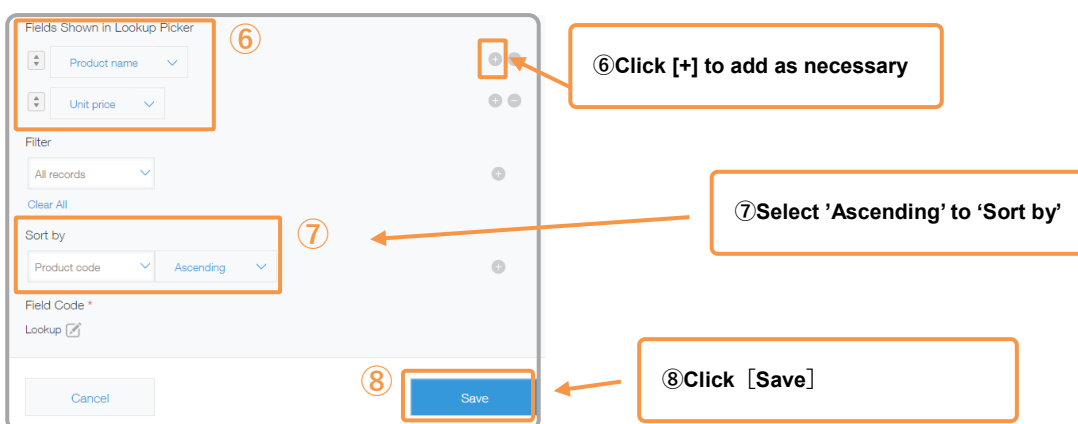
Select the field from the displayed fields in the selection screen from which you wish to retrieve. In this example, we will select **[Product name]** and **[Unit price]**.

⑦ Select sorting initial settings

Set the order of records from which you wish to retrieve. Select **[Product code]** and **[Ascending]**.

⑧ Save

Click **[Save]**.



Lookup is complete!

The screenshot shows a software interface with a left-hand menu of various field types and a main form area. The menu includes options like Label, Rich text, Number, Radio Button, Multi-choice, Date, Date and time, Link, Department selection, Related Records, Blank space, Text (single-line), Text Box (multi-line), Calculated, Check box, Drop-down, Time, Attachment, User selection, Group selection, Lookup, and Border. The main form area contains fields for Client, Department, Person in charge, E-mail, and Telephone. Below these is a table with columns: Product code, Product name, Unit price, Quantity, and Subtotal. The 'Product code' column has a text input field with 'Lookup' and 'Clear' buttons next to it. An orange box highlights the 'Lookup' button, and an arrow points from a text box saying 'Now we see 'Lookup' button' to it. The 'Unit price' column has a 'YEN' dropdown, and the 'Subtotal' column has a 'YEN' dropdown. A 'Total amount' field is at the bottom.

※Even if lookup reference data is edited, retrieved data will be unaffected.

→Click [Lookup] again to overwrite to the latest data.

→You can also import data through CSV file to update existing records.

※Below field type can be selected as a key field.

“Text(single line)” “Number” “Calculation” “Lookup” “Link” “Record number”

※Fields inside tables cannot be selected.



Let's try using lookup!

Enter product information from the “Product management” application.

- **Display the list of records from which you wish to lookup information**

When you click [lookup], a list screen of records from the “Product management” application will appear.

The initial form has four columns: Product code, Product name, Unit price, and Quantity. The 'Product code' field is empty, and the 'Lookup' button is highlighted with an orange box. A callout box points to the 'Lookup' button with the text: "Click Lookup without entering anything". Below the form is a 'Total amount' field.



The 'Product management' screen shows a table with the following data:

	Product code	Product name	Unit price	Quantity
Set	G0001	Garoon 300u		845
Set	G0002	Garoon 301u-1000u		800
Set	K0001	kintone lite corse		780
Set	K0002	kintone standard course		1500
Set	M0001	Mailwise standard		500

A callout box points to the 'Set' button for 'K0001' with the text: "From the “Product management” list, click “Select” on the records from which you wish to lookup." A 'Cancel' button is at the bottom left.



The final form shows the 'Product code' field populated with 'K0001'. A green message box says "Data lookup succeeded." The 'Product name' field is populated with 'kintone lite corse', the 'Unit price' field with '780', and the 'Quantity' field with 'YEN'. A callout box points to the 'Product code' field with the text: "Product code will be registered". Another callout box points to the 'Product name' and 'Unit price' fields with the text: "Other information will collectively be copied".

- **Enter keywords and click “Lookup”**

You can search for records by entering keywords.

If there is even one record that matches, the record information will be retrieved. If there are multiple records that match, a list of matching records will be displayed.

Product code	Product name	Unit price	Quantity
K0001	kintone lite corse	780 YEN	
Data lookup succeeded.			
O0001		YEN	

Enter the product code and click “Lookup”

Product code	Product name	Unit price	Quantity
K0001		YEN	
Data lookup succeeded.			
O0001	Office standard	500 YEN	
Data lookup succeeded.			

Matching record information will be entered!

Other information will be collectively copied

- **A link will be created, linking to the record which information was retrieved from**

Order reception

Order reception > Order list > 1

Reception Date: Mar 30, 2016
Receptionist: Yuta Sibutani

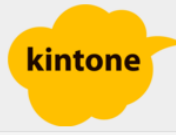
Person in charge: Susumu Tanaka
Email: tanaka@bozu.co.jp
Phone: 03-8765-4321

Product code	Product name	Unit price
K0001	kintone lite corse	
O0001	Office standard	

Total amount: 178000 YEN

Click “Product code”

The product management record, from which information was retrieved, is displayed

Product code	K0001
Product name	kintone lite corse
Unit price	780
Related picture	

| Example uses of lookup

- Inquiry management

Using lookup, you can lookup client information from other applications, and register inquiry information, preventing duplicate entries.

The screenshot shows a web application titled "Inquiry management". At the top, there are "Cancel" and "Save" buttons. Below these are input fields for "Date" (2017-05-07) and "Assignee" (Yuta Sibutani). The "Company name" field contains "Saibozu Co, Lt" and is highlighted with an orange border. Next to it is a "Lookup" button, also highlighted. Other fields include "Name" (Yuta Sato), "Area" (Minamikanto), "Address" (Tokyo Chuoku Nihonbash), and "TEL" (03-4306-0808). At the bottom, there is a section for "Inquiry detail" with radio buttons for "Opinion" (selected) and "Claim".

By using lookup, you can connect applications, making it an extremely convenient function!

Not only can you increase entry efficiency, you can also prevent mistakes.

Information retrieved with lookup will automatically be linked. If you click it, you can directly access the source information.

