

# TABLE|IT

Create and manage additional tables in Act!

- Create additional tables
- Additional data display options
- Vast search options
- Report function with integrated Report Designer



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## Create and manage additional tables in Act!

### TABLE|IT - Expand Act! by additional, individual tables

Every company has its own requirements for a CRM-system. In addition to the standard fields in a CRM-system usually there exists individual information or protocols that need to be attached to a customer data set in order to ensure sustainable productivity. This data often takes the shape of a simple table in Word or Excel but without any relation to your contact in Act! There is also no possibility to evaluate the data across multiple contacts. TABLE|IT offers exactly these functions for Act!:

- Create additional tables in Act!
- Calculable fields
- Layout configuration of table display
- Determine viewability for users and teams
- Search and analysis options
- Integrated report designer for reporting

The tables can be linked to contacts, companies, groups and opportunities, multiple relations are also possible. Companies and freelancers can create a relation system that are tailored to their requirements.

### TABLE|IT - with many functions, calculable fields as well as analyses and reports

You can set relations between tables or make calculations e.g. for service charges. The TABLE|IT software is a comfortable solution to compare and evaluate data with an intelligent search filter. In addition viewability and security settings for users and teams are quickly and explicitly definable. Further options include integration of graphic material and designing individual layouts to make reports clearer and easier to interpret. The integrated report designers serve their purpose of clear and meaningful design of evaluations and reports - making TABLE|IT a vital tool for presenting business reports and statistics.

### Individual or automatized creation of tables

Creating tables is done with TABLE|IT optionally automatized or individually. All it takes is a few clicks and information to design a new table. After opening the tab „new table“ you simply type in the name and choose for which superior data such as contacts, companies, groups or opportunities the table is to be displayed in Act!. Multiple options are possible. When you have defined the required columns simply click on "create" and save the result. Should you have column definitions for table creation available in CSV-format you can automatically create a table from those. With these tables you also have the option to add or deduct columns later on.

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We offer extensive Act! and add-on information and tips at [www.crmaddon-factory.com](http://www.crmaddon-factory.com)