

Effective Solutions

TableMaker Pro for ACT! 2008

Key Features

Create and Maintain Custom Tables in ACT! using easy to use interface

The Custom Table shows up in ACT! as a tab with an Excel type look & feel

You can create multiple Custom Table tabs associated with Contacts, Companies and Groups.

Lookup functionality is built into your Custom Table tab

An Export button is built into each Custom Table tab for quick export of table data into a CSV or TXT file

Edit/Replace functionality is built into each Custom Table tab so you can make mass updates to data if changes need to occur.

Transfer Data from existing ACT! fields into your Custom Tables using our "Field to Table Copy" function built into TableMakerPRO

Import data from CSV files into your Custom Tables

NOTE: You will need to be on ACT! 2008 Version 10.0.2.191 or higher in order for this utility to work. From within ACT you can go to Help > About ACT! to verify the version level of your ACT! software.

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Developed by Effective Solutions

Build, Use, and Maintain Custom Tables in ACT! 2008 Using TableMakerPRO From Effective Solutions

ACT! 2008 version 10.02 (patch) gives ACT! users the ability to create tabs in ACT! that are in a table format. This is what ACT! calls Custom Tables. The current challenge is that you need to be a programmer to add custom tables to ACT!. That is where TableMakerPRO for ACT! 2008 comes in. Our TableMakerPRO utility gives you a clean, feature rich utility to build, maintain, and use your Custom Tables in ACT!.

Custom Tables in ACT! gives you the ability to create unique solutions for data that falls into the "1-to-many" scenario. Here are a few examples of industries that are a good fit for custom table solutions:

- **Insurance Industry:** Policies Tab with multiple policies for each contact
- **Mortgage Industry:** Loan Tab with multiple loans for each contact
- **Equipment providers:** Need to track multiple pieces of equipment for each account. This can be done at the Contact, Group or Company level.

Here is what a Custom Table tab looks like, along with the Edit window:

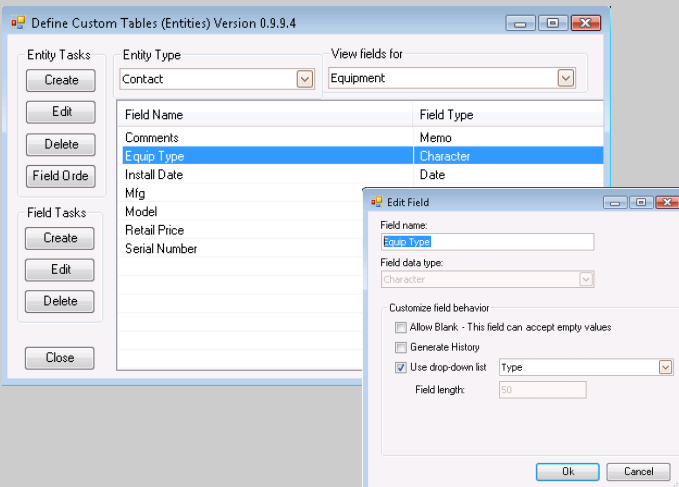
The screenshot displays the ACT! Custom Table interface. At the top, there are tabs for Notes, History, Activities, Opportunities, Groups/Companies, Secondary Contacts, Documents, and Contact Info. Below the tabs are buttons for Add, Edit, Delete, Lookup, Export, and Edit/Replace. The main table has columns for Install Date, Equip Type, Mfg, Model, Retail Price, and Serial Number. The table contains three rows of data, with the second row highlighted in blue. An 'Equipment' edit window is open, showing fields for Serial Number (112233), Model (Latitude D600), Equip Type (Laptop Computer), Install Date (3/10/2008), Retail Price (\$1,200.00), Comments, and Mfg (Dell). The window has OK and Cancel buttons.

Install Date	Equip Type	Mfg	Model	Retail Price	Serial Number
3/7/2008	Printer	Dell	3000cn	\$400.00	1234
3/10/2008	Laptop Computer	Dell	Latitude D600	\$1,200.00	112233
3/10/2008	Printer	HP	LS500	\$300.00	22222

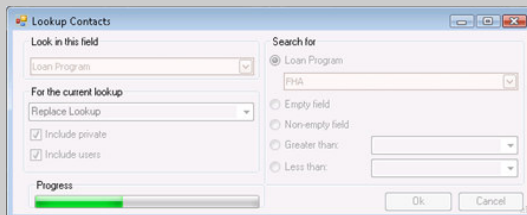
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TableMaker Pro for ACT! 2008

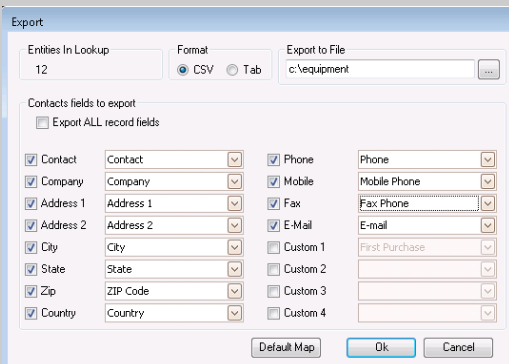
Easy to Use Configuration Tool



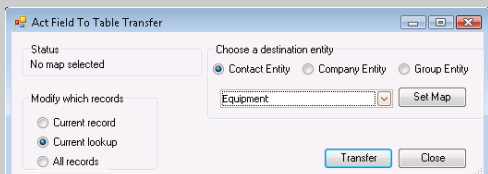
ACT!-like Lookup on each Tab



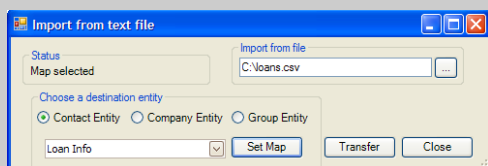
Export Table Data to a File



Copy Data from ACT fields into Tables



Import CSV files into Tables



PRODUCT FEATURES

Configuration is flexible and easy: Perform all of your Custom Table creation and customization changes on the main database, either from the server, or from a network connected workstation. Load the TableMakerPRO software on each client and the configuration changes will be distributed out to both network and sync users.

Set the Add/Edit Dialog Box field order: Using the TableMakerPRO utility, you can use the Field Order option to control the sequence and tab order of the fields on your Add/Edit dialog box.

"ACT!-like" Lookup Functionality on each Custom Table Tab: Each Custom Table tab you build will include a Lookup button that allows the ACT! user to perform lookups on the specific Custom Table they are currently using. The lookup will bring up all of the contacts that match the lookup criteria. For example: All contacts with a loan rate higher than 7%.

Export to File Option: Each Custom Table tab you build will include an Export button that allows the ACT! user to export the results of a lookup to a CSV or TXT file which opens quickly into Excel for further analysis and charting.

Reporting Options: The Custom Table data is part of the ACT! SQL database, so third-party tools such as Crystal Reports can be used to build reports using data in your Custom Tables.

EDIT/REPLACE Option: Each Custom Table tab you build will include an Edit/Replace button which can be used to perform mass updates to table data.

Copy Data from Existing ACT! Fields: If you have existing data in your ACT! database that would be better suited to exist in a Custom Table, you can use our Field to Table Copy function in TableMakerPRO to map ACT! field data into your Custom Table.

Import Data from CSV files: Import data from CSV files into your Customer Tables in ACT!.

PRODUCT PRICING:

1 to 4 Licenses = \$59 each

5 to 9 Licenses = \$55 each

10+ Licenses = \$50 each

Licenses are assigned to ACT! users.
Purchase a license for each ACT! user that you would like to use the Custom Table Tabs you build

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