



TableTop User Guide

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8/25/09

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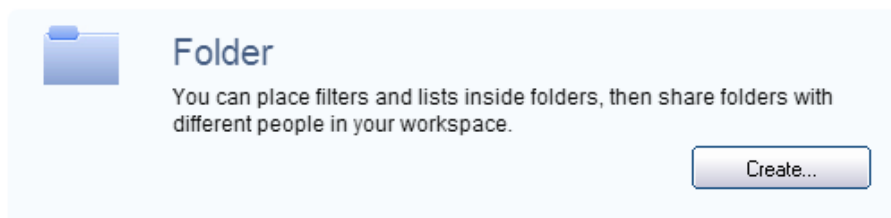
Introduction

This document sets out to provide detailed product information regarding the features and functionality of the TableTop application.

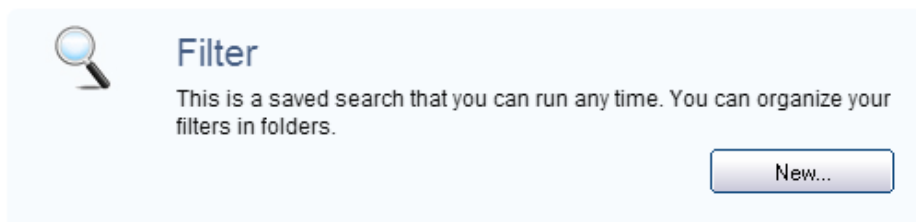
TableTop is a powerful database front-end that allows users to quickly create fully interactive views of data and visualize as drill down lists, charts, tables, org views, pipeline views, trend views, business form views, and a host of other rich views. Since it has full write-back capability, it goes well beyond reporting and dashboards and enables the rapid creation of departmental Cockpits on cloud databases. TableTop is infinitely customizable by business users, empowering full control of screen presentation of your key business information. TableTop runs natively on all of the dominant cloud computing platforms including Salesforce Force.com, Intuit QuickBooks, Amazon Web Services, Cisco Connect, and Microsoft Azure.

A key part of using TableTop is obtaining a clear understanding of the main concepts and components. TableTop consists of six primary components to assist users with managing and reporting on their data. These six components include:

Folder – Similar to a desktop metaphor, folders are created to organize all of your data views- filters, lists, web pages, snapshots and more. All Folders can be accessed on the left hand navigation panel. Users can easily share folders with other users in the same Org/Workspace and also dictate access rights to folders.



Filter –TableTop enables users to create views of records based on filtering criteria and save these views in a folder. Users can easily create cascading filters to create very specific business views. A filter returns the most up to date set of records each time it is run.



List – Lists behave like a filter but they are confined to a defined set of records. Lists can be created by adding records to the list to track or by starting with a filter and then saving as a defined list. Like filters, lists are “live” and always looking at the most recent state of the data. A Snapshot is a static list and takes a snapshot of the list data in time for archival and trend analysis.




List

This is a list of records like key Accounts. You can manually add or remove list items anytime.

New...

Web Page – Users can create quick access links to web pages that they use frequently and store them in folders.




Web Page

This lets you put any web page inside a folder.

New...

Database –TableTop allows users to add and modify custom objects, custom fields, standard entities and standard fields based on their permissions.




Database

Your data is stored as objects which contain fields. This lets you edit the objects and fields.

Edit...

Records – Users can easily import records in to a database via a csv file.



Records

Import new records into your workspace.

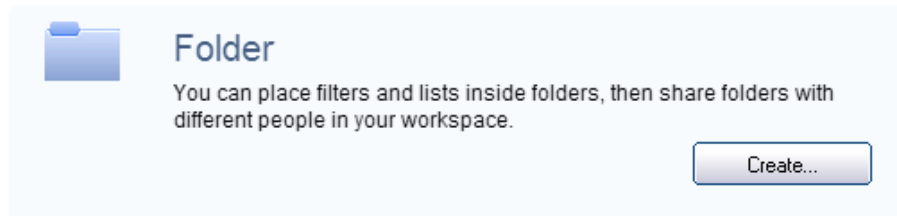
Import...

Folder

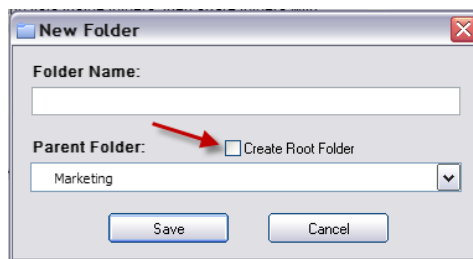
Similar to a desktop metaphor, folders are created to organize all of your data views- filters, lists, web pages, snapshots and more. All Folders can be accessed on the left hand navigation panel. Users can easily share folders with other users in the same Org/Workspace and also dictate access rights to folders. A folder can be created as a root folder or as a sub folder. There is no limit as to number of folders that can be created. Initially, when a folder is created, it is visible only to the user that created it. However, users have the ability to easily change the visibility/permissions settings for each folder. Folders can be moved and re-parented via drag and drop.

Creating a Folder

To create a Folder simply, click on the “Create” button on the Home Page.

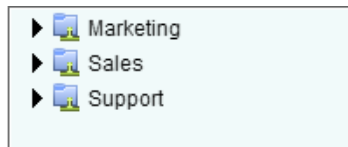


Once clicked, the New Folder dialog box will appear. Here the user can give the folder a name, choose whether the folder will be a Root Folder (Parent folder containing multiple sub folders) or a sub folder. To create the Root Folder simply check the box next to Create Root Folder; otherwise, select the Parent Folder from the drop down menu that you want to the folder to roll up to and then click the Next button.

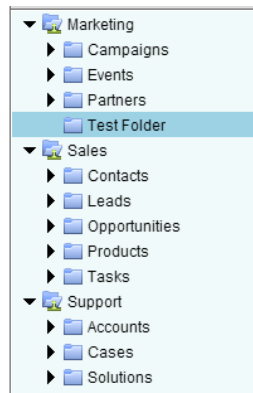


When a user first access TableTop, they will notice that there are three Root folders displayed on the left hand navigation bar. These three Root folders include:

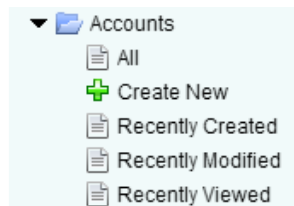
Marketing
Sales
Support



Each of the Root folders contains a sub folders created for each entity with the Org. All custom folders are displayed here as well.



Within each Sub folder, there are five options that a user can select from including:

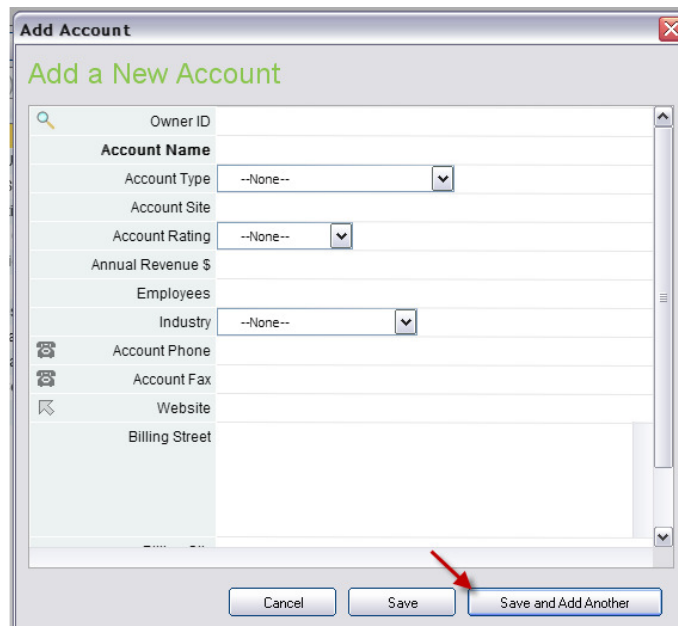


All – By selecting this option, the user can display a list of all of the records of that specific entity that are contained in the Org/Workspace. At the bottom of the list there are two one click command buttons enabling users to easily create and delete records. In addition, the user can easily save the list of records by clicking on the Save List or Save As button. The user can also utilize any of the reporting options in the Visualize drop down menu.

Account List (All) Page: 1

Account Name	Account Type	Account Rating	Billing State/Province	Account Phone	Owner ID
<input type="checkbox"/> GenePoint	Customer - Channel	Cold	CA	(650) 867-3450	Adam Buxbaum
<input type="checkbox"/> United Oil & Gas, UK	Customer - Direct		UK	+44 191 4956203	Adam Buxbaum
<input type="checkbox"/> United Oil & Gas, Singapore	Customer - Direct		Singapore	(650) 450-8810	Adam Buxbaum
<input type="checkbox"/> Edge Communications	Customer - Direct	Hot	TX	(512) 757-6000	Adam Buxbaum
<input type="checkbox"/> Burlington Textiles Corp of America	Customer - Direct	Warm	NC	(336) 222-7000	Adam Buxbaum
<input type="checkbox"/> Pyramid Construction Inc.	Customer - Channel			(014) 427-4427	Adam Buxbaum
<input type="checkbox"/> Dickenson plc	Customer - Channel		KS	(785) 241-6200	Adam Buxbaum
<input type="checkbox"/> Grand Hotels & Resorts Ltd	Customer - Direct	Warm	IL	(312) 596-1000	Adam Buxbaum
<input type="checkbox"/> Express Logistics and Transport	Customer - Channel	Cold	OR	(503) 421-7800	Adam Buxbaum
<input type="checkbox"/> University of Arizona	Customer - Direct	Warm	AZ	(520) 773-9050	Adam Buxbaum
<input type="checkbox"/> United Oil & Gas Corp.	Customer - Direct	Hot	NY	(212) 842-5500	Adam Buxbaum
<input type="checkbox"/> sForce			CA	(415) 901-7000	Adam Buxbaum

Create New – By clicking on the green plus sign icon, a user can easily create a new record for the selected entity. Once selected, the Add entity dialog will appear providing the user with a number of fields that they can populate. Users have the ability to easily create an additional record by simply clicking on the “Save and Add Another” button on the bottom.



Add Account

Add a New Account

Owner ID

Account Name

Account Type: --None--

Account Site

Account Rating: --None--

Annual Revenue \$

Employees

Industry: --None--

Account Phone

Account Fax

Website

Billing Street

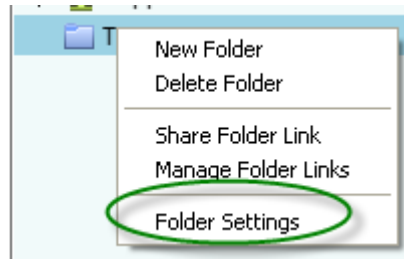
Recently Created – Selecting this option will display a list of records that have been recently created.

Recently Modified – Selecting this option will display a list of records that have been recently modified.

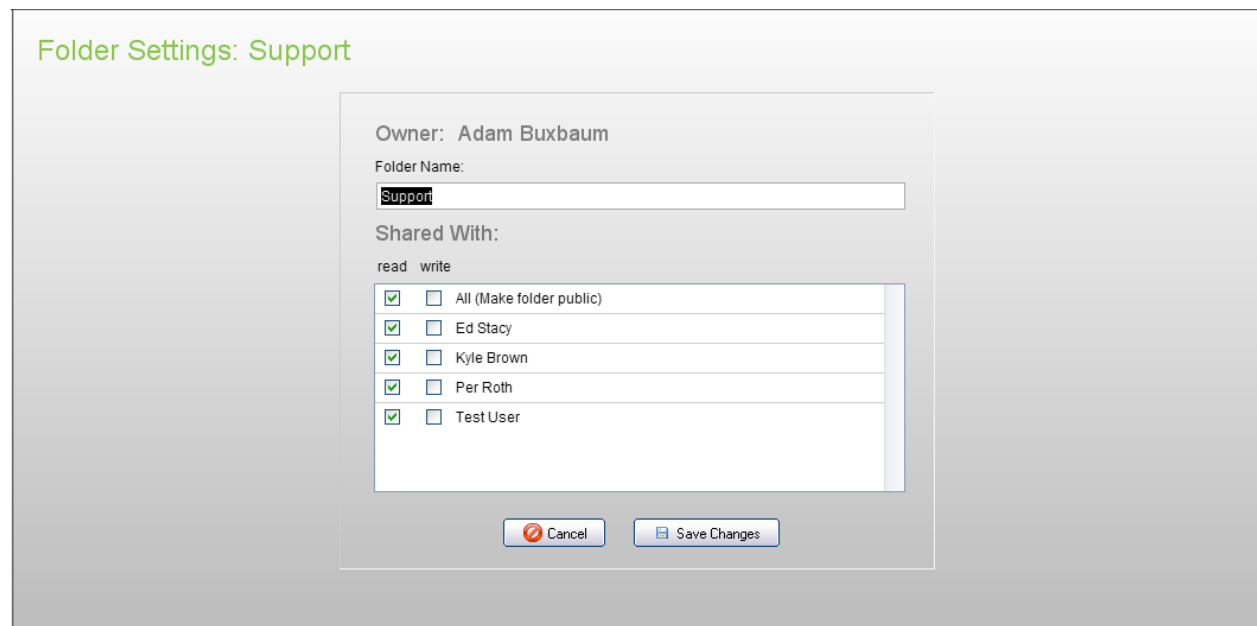
Recently Viewed – Selecting this option will display a list of records that have recently been viewed.

Setting Folder Permissions

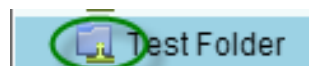
TableTop enables users to easily dictate user access permissions to folders. To set Folder Permissions, simply right click on the folder and select the Folder Settings command from the menu provided.



Once selected, the Folder Settings dialog will appear where user can easily assign read/write access. Users can also check the boxes next to All to make the folder public.

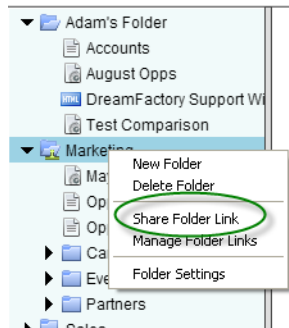


On the left hand navigation panel, a green icon located at the bottom of the Folder indicates that the document has been shared with other users.

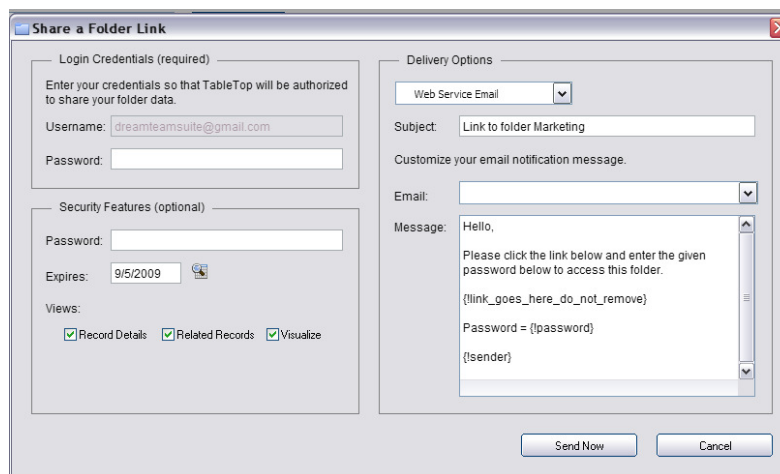


Sharing a Folder

Through the Active Links feature, Folders and all of their contents can easily be shared with anyone. To share a Folder simply right click on the folder and select the Share Folder Link command.



Once selected the Share a Folder Link dialog box will appear. Here the user must complete the following components:



The dialog box is titled "Share a Folder Link" and contains the following sections:

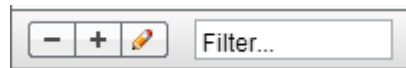
- Login Credentials (required):** Includes fields for Username (pre-filled with "dreamteamsuite@gmail.com") and Password.
- Security Features (optional):** Includes a Password field, an Expires date field (pre-filled with "9/5/2009"), and three checked checkboxes: "Record Details", "Related Records", and "Visualize".
- Delivery Options:** Includes a dropdown menu set to "Web Service Email", a Subject field (pre-filled with "Link to folder Marketing"), and a section to "Customize your email notification message" with an Email field and a Message text area. The message text area contains: "Hello, Please click the link below and enter the given password below to access this folder. {link_goes_here_do_not_remove} Password = {password} {sender}"


Buttons for "Send Now" and "Cancel" are located at the bottom right.


1. Enter their password in the box in the top left box. **(Note: If using TableTop on SFDC platform, user must enter their Security Token directly after password)**
2. In the Security Features box, the user can add a password so that the end user must enter it to have access to the link. In addition, the user can add an expiration date to the link, as well as dictate what views they want the end user to have.
3. Next the user must select their Delivery Option. There are three options available including Web Service Email, Microsoft Outlook and Copy to Clipboard.
4. Next type the email address or multiple addresses in the assigned box.
5. Lastly, click the send button.


Editing a Folder


Editing a folder in TableTop is easy. On the bottom of the left hand navigation panel there are three icons that assist users in editing folders.



 Selecting the minus icon enables users to delete unwanted folders.

 Selecting the plus icon will bring the user back to the main screen so that they can create a new folder.

 Selecting the pencil icon will open the Folder Settings where the user can edit the Folder.

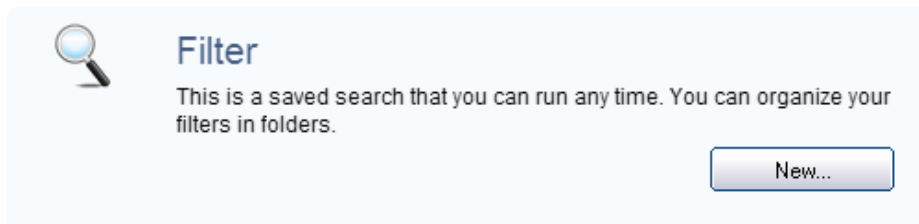
 Users can filter for specific folders by simply typing the folder name in the Filter box.

Filter

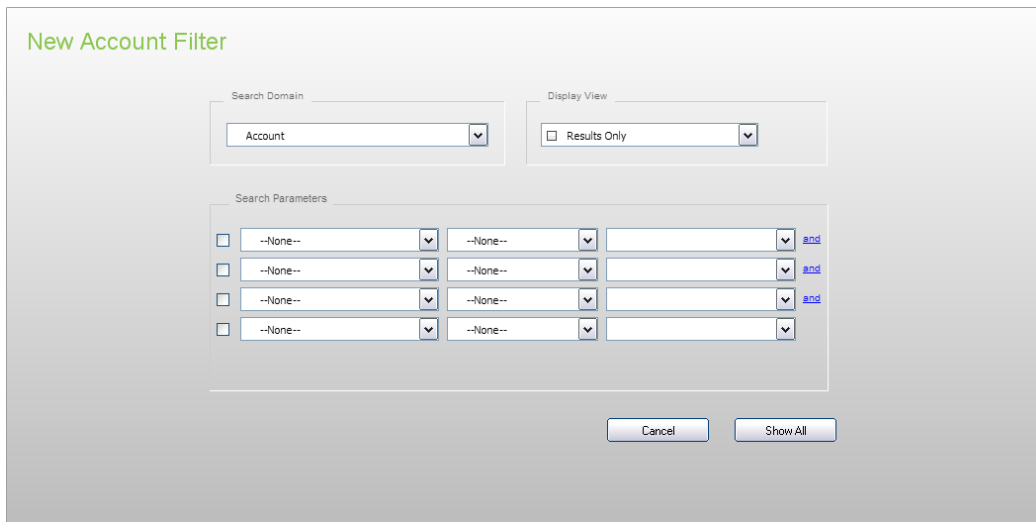
TableTop enables users to create views of records based on filtering criteria and save these views in a folder. Users can easily create cascading filters to create very specific business views. A filter returns the most up to date set of records each time it is run.

Creating a Filter

To create a Filter, simply click on the “New” button on the Home Page



The New Entity Filter dialog will appear. Here users can select the desired entity that they want to display the records for from the first drop down menu.



The screenshot shows a dialog box titled "New Account Filter" in green text. The dialog has a light gray background and contains the following elements:

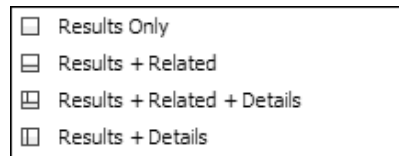
- Search Domain:** A dropdown menu with "Account" selected.
- Display View:** A dropdown menu with "Results Only" selected.
- Search Parameters:** A section containing four rows of search criteria. Each row starts with a checkbox, followed by two dropdown menus (both showing "--None--"), a text input field, and a blue "and" link.
- Buttons:** "Cancel" and "Show All" buttons at the bottom right.

Filtered Record View

Users can then choose how they want to display the Filter results from one of four different Display Views. These four Display Views can be accessed from the Display View drop down menu.




These four Display Views include:



Results Only

The first Display View is the “Results Only” view. Selecting this option will display a list of all of the records returned by the Filter.

Account Filter (unsaved)							Page: 1	Visualize	Edit Filter	Save As...
<input type="checkbox"/>	Account Name	Account Type	Account Rating	Billing State/Province	Account Phone	Owner ID				
<input type="checkbox"/>	Boy Scouts of America	Customer - Direct				Adam Buxbaum				
<input type="checkbox"/>	Freeman House	Customer - Direct	Warm		+44 (0)8450 546 503	Adam Buxbaum				
<input checked="" type="checkbox"/>	University of Arizona	Customer - Direct	Warm	AZ	(520) 773-9050	Adam Buxbaum				
<input type="checkbox"/>	Pyramid Construction Inc.	Customer - Channel			(014) 427-4427	Adam Buxbaum				
<input type="checkbox"/>	Dickenson plc	Customer - Channel		KS	(785) 241-6200	Adam Buxbaum				
<input type="checkbox"/>	Grand Hotels & Resorts Ltd	Customer - Direct	Warm	IL	(312) 596-1000	Adam Buxbaum				
<input type="checkbox"/>	Express Logistics and Transport	Customer - Channel	Cold	OR	(503) 421-7800	Adam Buxbaum				
<input type="checkbox"/>	GenePoint	Customer - Channel	Cold	CA	(650) 867-3450	Adam Buxbaum				
<input type="checkbox"/>	United Oil & Gas, UK	Customer - Direct		UK	+44 191 4956203	Adam Buxbaum				
<input type="checkbox"/>	United Oil & Gas, Singapore	Customer - Direct		Singapore	(650) 450-8810	Adam Buxbaum				
<input type="checkbox"/>	Edge Communications	Customer - Direct	Hot	TX	(512) 757-6000	Adam Buxbaum				
<input type="checkbox"/>	Burlington Textiles Corp of America	Customer - Direct	Warm	NC	(336) 222-7000	Adam Buxbaum				
<input type="checkbox"/>	United Oil & Gas Corp.	Customer - Direct	Hot	NY	(212) 842-5500	Adam Buxbaum				
<input type="checkbox"/>	Weyerhaeuser Company	Prospect	Warm	MS	(601) 932-1422	Adam Buxbaum				
<input type="checkbox"/>	People Networks	Customer - Direct		England	02079530038	Adam Buxbaum				
<input type="checkbox"/>	sForce			CA	(415) 901-7000	Adam Buxbaum				
<input type="checkbox"/>	What is the	Prospect	Warm	NY	(212) 655-8667	Adam Buxbaum				
<input type="checkbox"/>	Yates Printers	Other	Warm	QC	(514) 726-2786	Adam Buxbaum				
<input type="checkbox"/>	Burlington Coat Factory			NY	212-555-1212	Adam Buxbaum				
<input type="checkbox"/>	Burlington Jacket Barn			GA	678-555-1212	Adam Buxbaum				
<input type="checkbox"/>	General Electric	Customer - Direct		CT	(203) 272-2211	Adam Buxbaum				


 Results + Related

The second Display View is the “Results + Related” view. Selecting this option will display a list of records of the selected entity, plus displays records from a related entity that can be selected from a drop down menu at the bottom of the screen. (Ex: If the user wants to display All Accounts and related Opportunities, they must simply select Accounts as the primary entity and then select Opportunities related by Account ID from the related drop down menu.)

Account Filter (unsaved)							Page: 1	Visualize	Edit Filter	Save As...
<input type="checkbox"/>	Account Name	Account Type	Account Rating	Billing State/Province	Account Phone	Owner ID				
<input type="checkbox"/>	Boy Scouts of America	Customer - Direct				Adam Buxbaum				
<input type="checkbox"/>	Freeman House	Customer - Direct	Warm		+44 (0)8450 546 503	Adam Buxbaum				
<input checked="" type="checkbox"/>	University of Arizona	Customer - Direct	Warm	AZ	(520) 773-9050	Adam Buxbaum				
<input type="checkbox"/>	Pyramid Construction Inc.	Customer - Channel			(014) 427-4427	Adam Buxbaum				
<input type="checkbox"/>	Dickenson plc	Customer - Channel		KS	(785) 241-6200	Adam Buxbaum				
<input type="checkbox"/>	Grand Hotels & Resorts Ltd	Customer - Direct	Warm	IL	(312) 596-1000	Adam Buxbaum				
<input type="checkbox"/>	Express Logistics and Transport	Customer - Channel	Cold	OR	(503) 421-7800	Adam Buxbaum				
<input type="checkbox"/>	GenePoint	Customer - Channel	Cold	CA	(650) 867-3450	Adam Buxbaum				
<input type="checkbox"/>	United Oil & Gas, UK	Customer - Direct		UK	+44 191 4956203	Adam Buxbaum				
<input type="checkbox"/>	United Oil & Gas, Singapore	Customer - Direct		Singapore	(650) 450-8810	Adam Buxbaum				
<input type="checkbox"/>	Edge Communications	Customer - Direct	Hot	TX	(512) 757-6000	Adam Buxbaum				
<input type="checkbox"/>	Burlington Textiles Corp of America	Customer - Direct	Warm	NC	(336) 222-7000	Adam Buxbaum				
<input type="checkbox"/>	United Oil & Gas Corp	Customer - Direct	Hot	NV	(702) 242-5500	Adam Buxbaum				

Related:

<input type="checkbox"/>	Name	Amount	Close Date	Stage	Owner ID
<input type="checkbox"/>	University of AZ Installations	\$100,000.00	3/6/2006	Proposal/Price Quote	Adam Buxbaum
<input type="checkbox"/>	University of AZ Portable Generators	\$50,000.00	3/6/2006	Closed Won	Adam Buxbaum
<input type="checkbox"/>	University of AZ SLA	\$90,000.00	3/6/2006	Closed Won	Adam Buxbaum

 Results + Related + Details

The third Display View is the “Results + Related + Details” view. Selecting this option will display a list of the records of the selected entity, plus displays records from a related entity. In addition, a third dialog box is opened where the user can make edits to the primary list of selected records.

Account Filter (unsaved)				Page: 1	Visualize	Edit Filter	Save As...
<input type="checkbox"/>	Account Name	Account Type	Account Rating				
<input type="checkbox"/>	Boy Scouts of America	Customer - Direct					
<input type="checkbox"/>	Freeman House	Customer - Direct	Warm				
<input checked="" type="checkbox"/>	University of Arizona	Customer - Direct	Warm				
<input type="checkbox"/>	Pyramid Construction Inc.	Customer - Channel					
<input type="checkbox"/>	Dickenson plc	Customer - Channel					
<input type="checkbox"/>	Grand Hotels & Resorts Ltd	Customer - Direct	Warm				
<input type="checkbox"/>	Express Logistics and Transport	Customer - Channel	Cold				
<input type="checkbox"/>	GenePoint	Customer - Channel	Cold				
<input type="checkbox"/>	United Oil & Gas, UK	Customer - Direct					
<input type="checkbox"/>	United Oil & Gas, Singapore	Customer - Direct					
<input type="checkbox"/>	Edge Communications	Customer - Direct	Hot				
<input type="checkbox"/>	Burlington Textiles Corp of America	Customer - Direct	Warm				
<input type="checkbox"/>	United Oil & Gas Corp	Customer - Direct	Hot				

Owner ID: Adam Buxbaum

Account Name: University of Arizona

Account Type:

Account Site:

Account Rating:

Annual Revenue \$:

Employees: 39000

Industry:

Account Phone: (520) 773-9050

Account Fax: (520) 773-9060

Website: www.universityofarizona.com

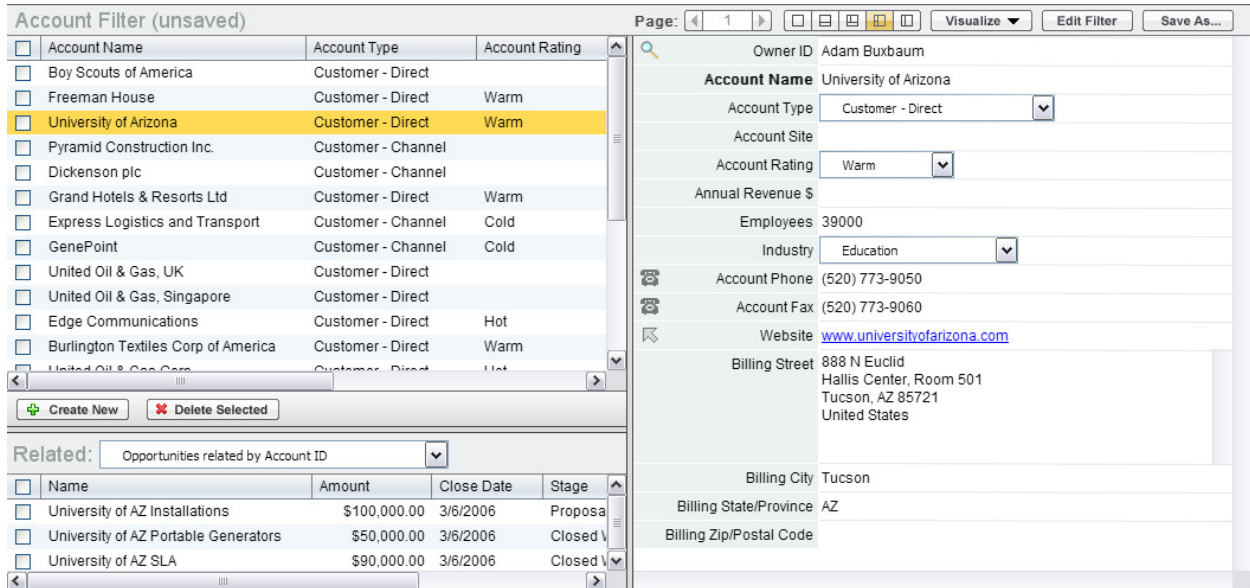
Billing Street: 888 N Euclid

Related:

<input type="checkbox"/>	Name	Amount	Close Date	Stage	Owner ID
<input type="checkbox"/>	University of AZ Installations	\$100,000.00	3/6/2006	Proposal/Price Quote	Adam Buxbaum
<input type="checkbox"/>	University of AZ Portable Generators	\$50,000.00	3/6/2006	Closed Won	Adam Buxbaum
<input type="checkbox"/>	University of AZ SLA	\$90,000.00	3/6/2006	Closed Won	Adam Buxbaum

Results + Details

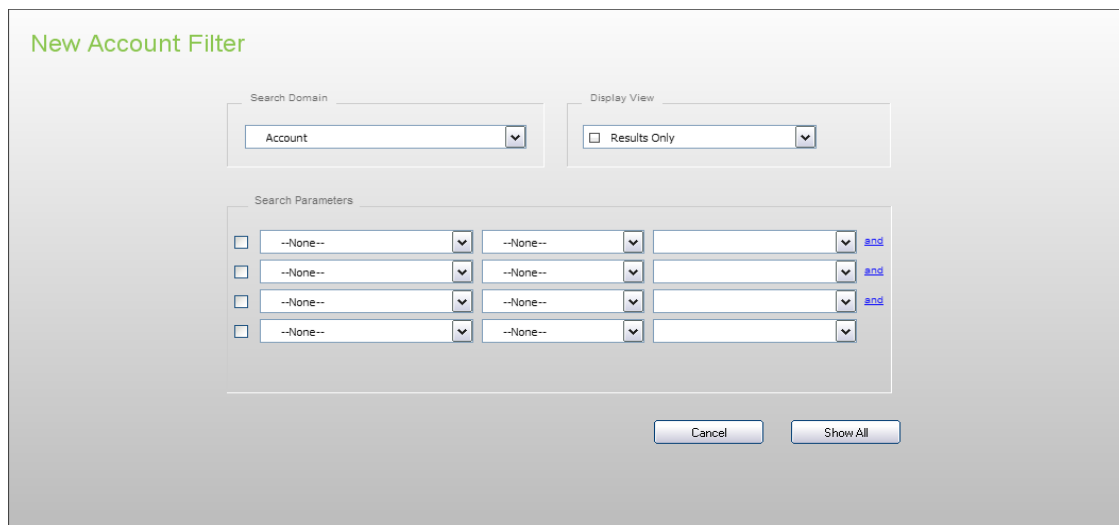
The fourth Display View is the “Results + Details” view. Selecting this option will display a list of the records of the selected entity, plus displays records from a related entity. In addition, a third dialog box is opened where the user can make edits to either the primary or secondary list of selected records.



The screenshot shows the 'Account Filter (unsaved)' dialog box. On the left, there is a list of accounts with columns for Account Name, Account Type, and Account Rating. The 'University of Arizona' account is selected and highlighted in yellow. Below the list are 'Create New' and 'Delete Selected' buttons. On the right, the 'Details' view for the 'University of Arizona' account is displayed, showing fields for Owner ID, Account Name, Account Type, Account Site, Account Rating, Annual Revenue, Employees, Industry, Account Phone, Account Fax, Website, Billing Street, Billing City, Billing State/Province, and Billing Zip/Postal Code.

Additional Filtering Functionality

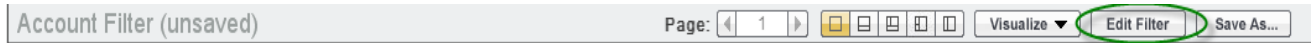
Users have the ability to narrow down their search criteria by allowing the creation of cascading filters in an effort to obtain the desired results. Users can easily create both and /or filters.



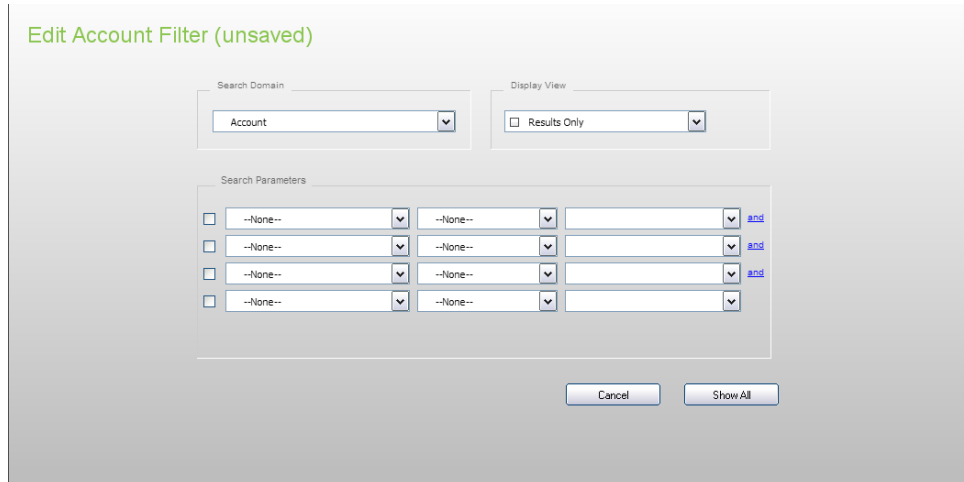
The screenshot shows the 'New Account Filter' dialog box. It has a title bar 'New Account Filter' in green. Below the title bar, there are two sections: 'Search Domain' and 'Display View'. The 'Search Domain' section has a dropdown menu with 'Account' selected. The 'Display View' section has a dropdown menu with 'Results Only' selected. Below these sections is the 'Search Parameters' section, which contains four rows of search criteria. Each row has a checkbox, a dropdown menu with '--None--' selected, another dropdown menu with '--None--' selected, a text input field, and an 'and' button. At the bottom of the dialog box, there are 'Cancel' and 'Show All' buttons.

Editing Filters

To Edit a Filter, simply click on the Edit Filter button located at the top of the results box.

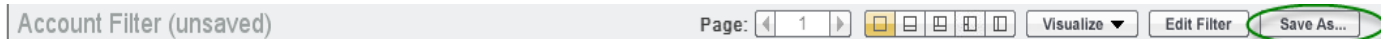


Once selected, the Edit Entity Filter (unsaved) dialog will appear. Here the user can edit the filter.

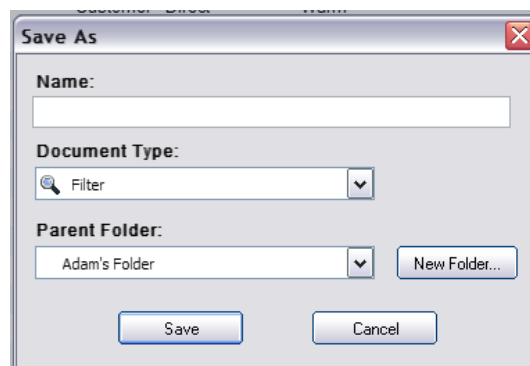


Saving Filters

Filters can be easily saved by simply clicking the "Save As" button located at the top of the results box.

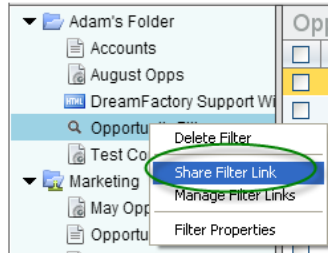


Once selected, the Save As dialog box will appear, where users can provide the filter with a Name, select the type of document they want to save the results as from the Document Type drop down menu. Users can also choose which Parent Folder or create a new folder to store the document in.

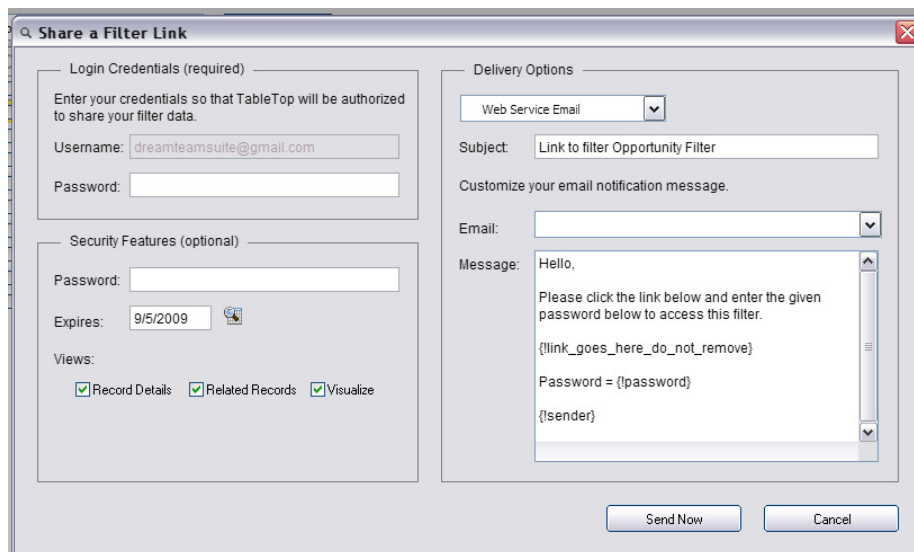


Sharing a Filter

Through the Active Links feature, Filters can easily be shared with anyone. To share a Filter simply right click on the Filter and select the Share Filter Link command.



Once selected the Share a Filter Link dialog box will appear, where the user must complete the following components:



The dialog box is titled "Share a Filter Link" and is divided into three main sections:

- Login Credentials (required):** Includes a text box for "Username" (pre-filled with "dreamteamsuite@gmail.com") and a text box for "Password".
- Security Features (optional):** Includes a text box for "Password", an "Expires" date field (pre-filled with "9/5/2009"), and three checked checkboxes: "Record Details", "Related Records", and "Visualize".
- Delivery Options:** Includes a dropdown menu for "Web Service Email", a "Subject" text box (pre-filled with "Link to filter Opportunity Filter"), and a "Message" text area. The message content is: "Hello, Please click the link below and enter the given password below to access this filter. {link_goes_here_do_not_remove} Password = {password} {!sender}"

At the bottom right, there are "Send Now" and "Cancel" buttons.

1. Enter their password in the box in the top left box. (**Note: If using TableTop on SFDC platform, user must enter their Security Token directly after password**)

2. In the Security Features box, the user can add a password so that the end user must enter it to have access to the link. In addition, the user can add an expiration date to the link, as well as dictate what views they want the end user to have.

3. Next the user must select their Delivery Option. There are three options available including Web Service Email, Microsoft Outlook and Copy to Clipboard.

4. Next type the email address or multiple addresses in the assigned box.

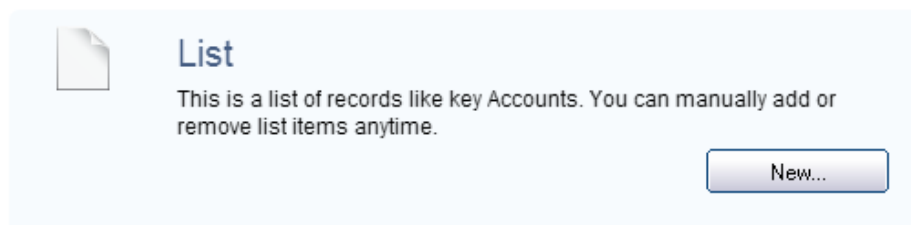
5. Lastly, click the send button.

List

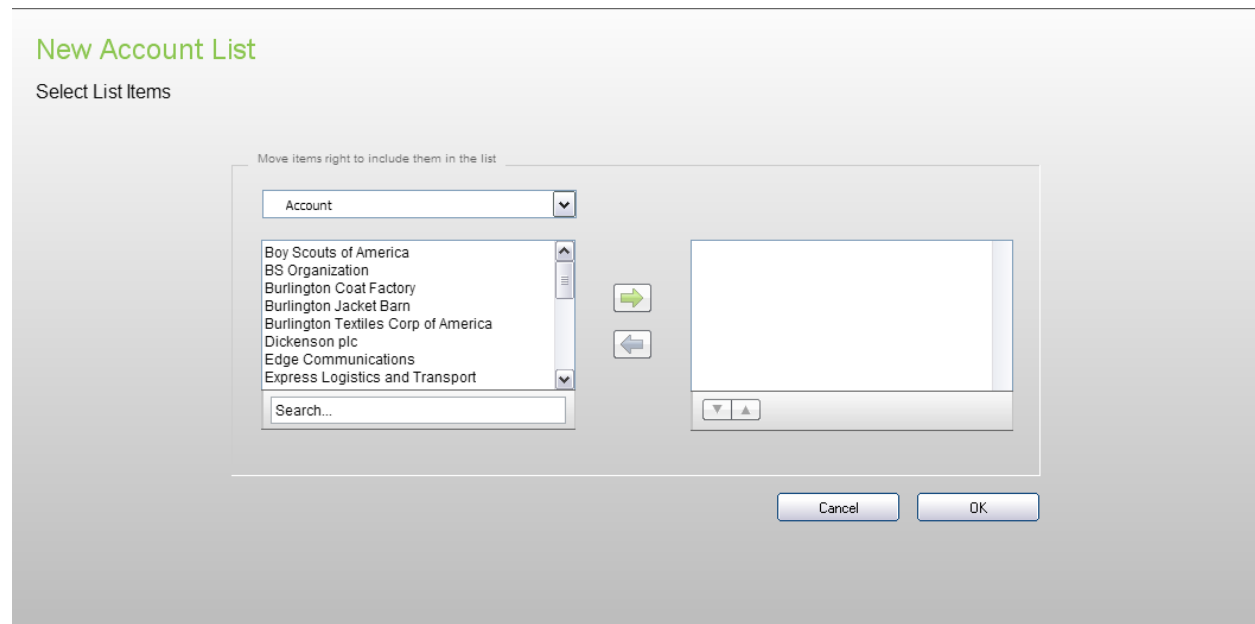
Lists behave like a filter but they are confined to a defined set of records. Lists can be created by adding records to the list to track or by starting with a filter and then saving as a defined list. Like filters, lists are “live” and always looking at the most recent state of the data. A Snapshot is a static list and takes a snapshot of the list data in time for archival and trend analysis.

Creating a List

To create a List, simply click on the “New” button on the Home Page.

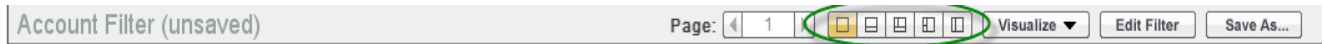


Once selected, the New Entity List dialog box will appear, where the user can select the entity they want to create a list of records of. Then the user can choose the desired records, click the green arrow to move them to the selected box and then click the OK button.



List Record View

After the list is created, a List of the records will appear. Here users can select from one of five views to interact with the results. These views are the same Display Views mentioned above with one additional view enabling users to make changes to existing records. The five views are accessible by clicking on the icons on the top of the dialog box. These views include:



Results Only

The first Display View is the “Results Only” view. Selecting this option will display provide a list of all of the records of the selected entity.

Account List (unsaved)

Account Name	Account Type	Account Rating	Billing State/Province	Account Phone	Owner ID
<input checked="" type="checkbox"/> GenePoint	Customer - Channel	Cold	CA	(650) 867-3450	Adam Buxbaum
<input type="checkbox"/> United Oil & Gas, UK	Customer - Direct		UK	+44 191 4956203	Adam Buxbaum
<input type="checkbox"/> United Oil & Gas, Singapore	Customer - Direct		Singapore	(650) 450-8810	Adam Buxbaum
<input type="checkbox"/> Edge Communications	Customer - Direct	Hot	TX	(512) 757-6000	Adam Buxbaum
<input type="checkbox"/> Burlington Textiles Corp of America	Customer - Direct	Warm	NC	(336) 222-7000	Adam Buxbaum
<input type="checkbox"/> Pyramid Construction Inc.	Customer - Channel			(014) 427-4427	Adam Buxbaum
<input type="checkbox"/> Dickenson plc	Customer - Channel		KS	(785) 241-6200	Adam Buxbaum
<input type="checkbox"/> Grand Hotels & Resorts Ltd	Customer - Direct	Warm	IL	(312) 596-1000	Adam Buxbaum
<input type="checkbox"/> Express Logistics and Transport	Customer - Channel	Cold	OR	(503) 421-7800	Adam Buxbaum
<input type="checkbox"/> University of Arizona	Customer - Direct	Warm	AZ	(520) 773-9050	Adam Buxbaum
<input type="checkbox"/> United Oil & Gas Corp.	Customer - Direct	Hot	NY	(212) 842-5500	Adam Buxbaum
<input type="checkbox"/> Freeman House	Customer - Direct	Warm		+44 (0)8450 546 503	Adam Buxbaum
<input type="checkbox"/> People Networks	Customer - Direct		England	02079530038	Adam Buxbaum
<input type="checkbox"/> sForce			CA	(415) 901-7000	Adam Buxbaum
<input type="checkbox"/> What is the	Prospect	Warm	NY	(212) 655-8667	Adam Buxbaum
<input type="checkbox"/> Yates Printers	Other	Warm	QC	(514) 726-2786	Adam Buxbaum
<input type="checkbox"/> Weyerhaeuser Company	Prospect	Warm	MS	(601) 932-1422	Adam Buxbaum
<input type="checkbox"/> Burlington Coat Factory			NY	212-555-1212	Adam Buxbaum
<input type="checkbox"/> Burlington Jacket Barn			GA	678-555-1212	Adam Buxbaum
<input type="checkbox"/> General Electric	Customer - Direct		CT	(203) 373-2211	Adam Buxbaum
<input type="checkbox"/> sForce	Customer - Direct		CA	(415) 901-7000	Adam Buxbaum

Results + Related

The second Display View is the “Results + Related” view. Selecting this option will display a list of records of the selected entity, plus displays records from a related entity that can be selected from a drop down menu at the bottom of the screen.

Account List (unsaved)

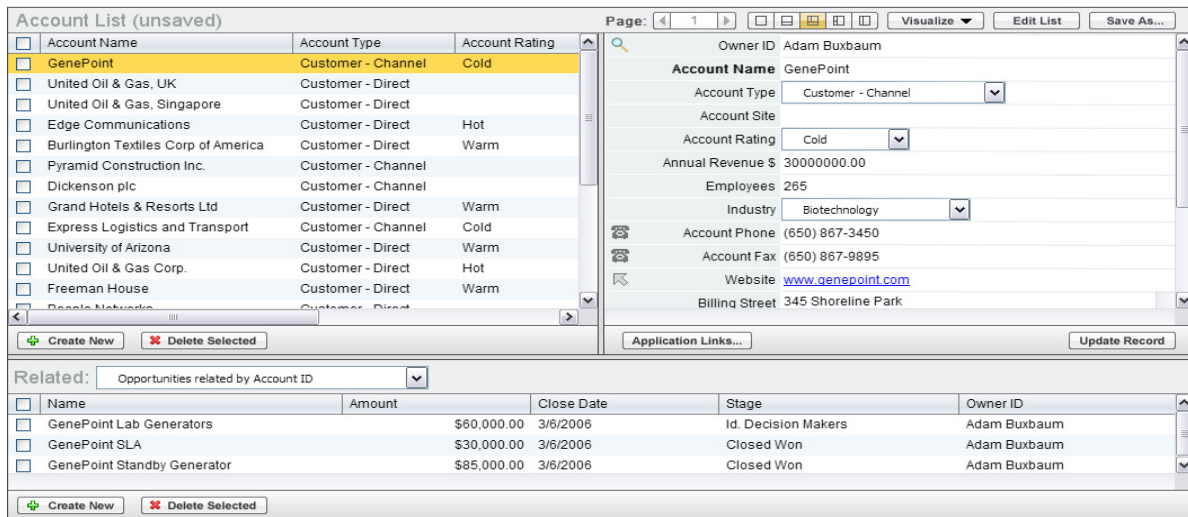
Account Name	Account Type	Account Rating	Billing State/Province	Account Phone	Owner ID
<input checked="" type="checkbox"/> GenePoint	Customer - Channel	Cold	CA	(650) 867-3450	Adam Buxbaum
<input type="checkbox"/> United Oil & Gas, UK	Customer - Direct		UK	+44 191 4956203	Adam Buxbaum
<input type="checkbox"/> United Oil & Gas, Singapore	Customer - Direct		Singapore	(650) 450-8810	Adam Buxbaum
<input type="checkbox"/> Edge Communications	Customer - Direct	Hot	TX	(512) 757-6000	Adam Buxbaum
<input type="checkbox"/> Burlington Textiles Corp of America	Customer - Direct	Warm	NC	(336) 222-7000	Adam Buxbaum
<input type="checkbox"/> Pyramid Construction Inc.	Customer - Channel			(014) 427-4427	Adam Buxbaum
<input type="checkbox"/> Dickenson plc	Customer - Channel		KS	(785) 241-6200	Adam Buxbaum
<input type="checkbox"/> Grand Hotels & Resorts Ltd	Customer - Direct	Warm	IL	(312) 596-1000	Adam Buxbaum
<input type="checkbox"/> Express Logistics and Transport	Customer - Channel	Cold	OR	(503) 421-7800	Adam Buxbaum
<input type="checkbox"/> University of Arizona	Customer - Direct	Warm	AZ	(520) 773-9050	Adam Buxbaum
<input type="checkbox"/> United Oil & Gas Corp.	Customer - Direct	Hot	NY	(212) 842-5500	Adam Buxbaum
<input type="checkbox"/> Freeman House	Customer - Direct	Warm		+44 (0)8450 546 503	Adam Buxbaum
<input type="checkbox"/> People Networks	Customer - Direct		England	02079530038	Adam Buxbaum

Related: Opportunities related by Account ID

Name	Amount	Close Date	Stage	Owner ID
<input type="checkbox"/> GenePoint Lab Generators	\$60,000.00	3/6/2006	Id. Decision Makers	Adam Buxbaum
<input type="checkbox"/> GenePoint SLA	\$30,000.00	3/6/2006	Closed Won	Adam Buxbaum
<input type="checkbox"/> GenePoint Standby Generator	\$85,000.00	3/6/2006	Closed Won	Adam Buxbaum

☐ Results + Related + Details

The third Display View is the “Results + Related + Details” view. Selecting this option will display a list of the records of the selected entity, plus displays records from a related entity. In addition, a third dialog box is opened where the user can make edits to the primary list of selected records.

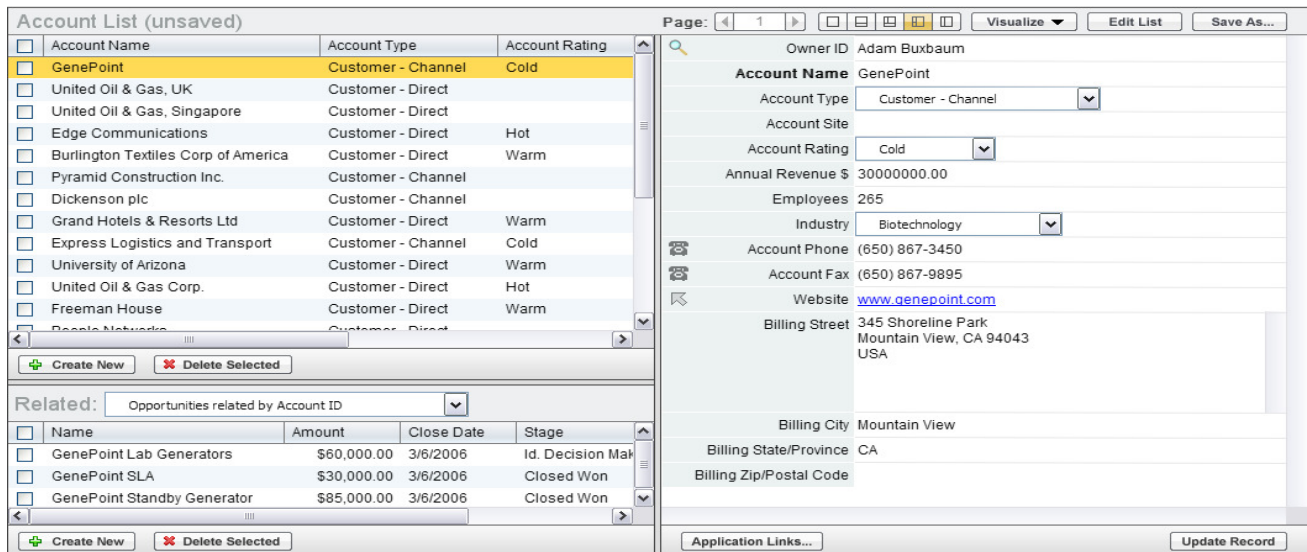


The screenshot shows the 'Account List (unsaved)' interface. The primary list on the left includes accounts like GenePoint, United Oil & Gas, UK, and others. The right pane shows details for GenePoint, including Owner ID (Adam Buxbaum), Account Type (Customer - Channel), Account Rating (Cold), Annual Revenue (\$3000000.00), Employees (265), and Industry (Biotechnology). Below the details is a 'Related:' section showing opportunities related to the account ID, with columns for Name, Amount, Close Date, Stage, and Owner ID.

Name	Amount	Close Date	Stage	Owner ID
GenePoint Lab Generators	\$60,000.00	3/6/2006	Id. Decision Makers	Adam Buxbaum
GenePoint SLA	\$30,000.00	3/6/2006	Closed Won	Adam Buxbaum
GenePoint Standby Generator	\$85,000.00	3/6/2006	Closed Won	Adam Buxbaum

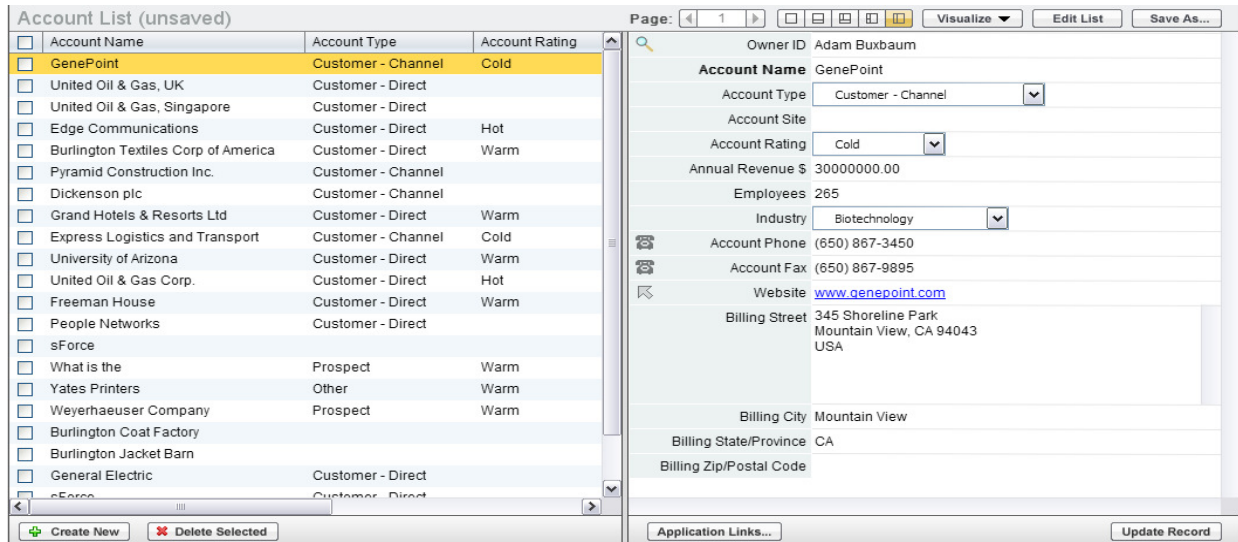
☐ Results + Details

The fourth Display View is the “Results + Details” view. Selecting this option will display a list of the records of the selected entity, plus displays records from a related entity. In addition, a third dialog box is opened where the user can make edits to either the primary or secondary list of selected records.



This screenshot is similar to the previous one but shows a different view of the details pane. The 'Billing Street' field is expanded to show the full address: 345 Shoreline Park, Mountain View, CA 94043, USA. The 'Billing City' is Mountain View, and the 'Billing State/Province' is CA.

The fifth view displays List results and record details enabling users to easily make edits to any record.



The screenshot shows the 'Account List (unsaved)' interface. On the left is a table of accounts, and on the right is a detailed view for the selected 'GenePoint' account.

Account Name	Account Type	Account Rating
<input checked="" type="checkbox"/> GenePoint	Customer - Channel	Cold
<input type="checkbox"/> United Oil & Gas, UK	Customer - Direct	
<input type="checkbox"/> United Oil & Gas, Singapore	Customer - Direct	
<input type="checkbox"/> Edge Communications	Customer - Direct	Hot
<input type="checkbox"/> Burlington Textiles Corp of America	Customer - Direct	Warm
<input type="checkbox"/> Pyramid Construction Inc.	Customer - Channel	
<input type="checkbox"/> Dickenson plc	Customer - Channel	
<input type="checkbox"/> Grand Hotels & Resorts Ltd	Customer - Direct	Warm
<input type="checkbox"/> Express Logistics and Transport	Customer - Channel	Cold
<input type="checkbox"/> University of Arizona	Customer - Direct	Warm
<input type="checkbox"/> United Oil & Gas Corp.	Customer - Direct	Hot
<input type="checkbox"/> Freeman House	Customer - Direct	Warm
<input type="checkbox"/> People Networks	Customer - Direct	
<input type="checkbox"/> sForce		
<input type="checkbox"/> What is the	Prospect	Warm
<input type="checkbox"/> Yates Printers	Other	Warm
<input type="checkbox"/> Weyerhaeuser Company	Prospect	Warm
<input type="checkbox"/> Burlington Coat Factory		
<input type="checkbox"/> Burlington Jacket Barn		
<input type="checkbox"/> General Electric	Customer - Direct	
<input type="checkbox"/> sForce	Customer - Direct	

Account Details for GenePoint:

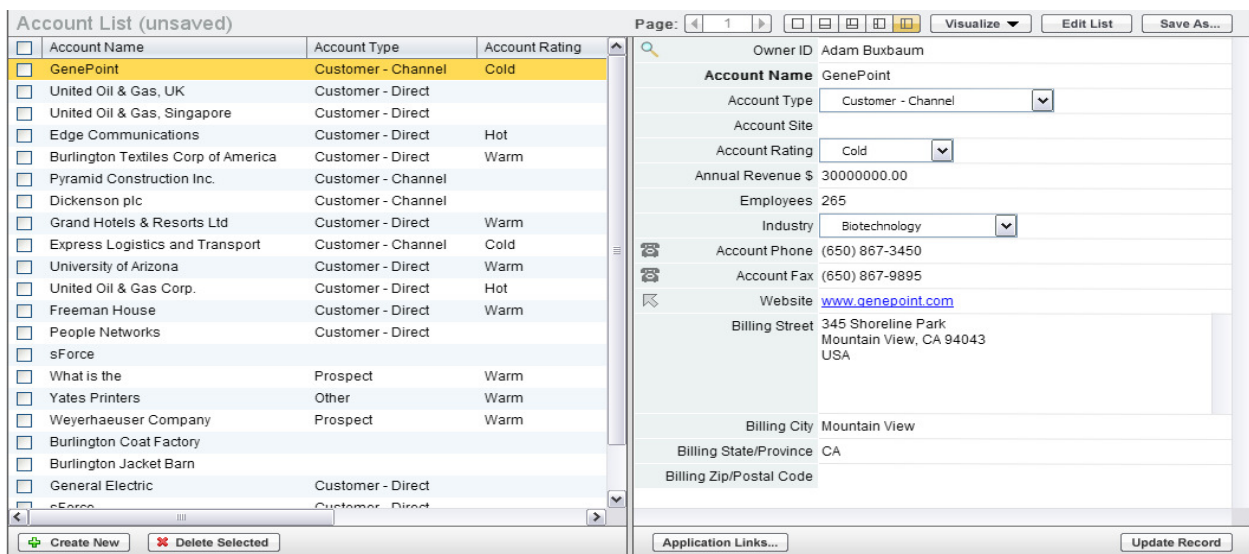
- Owner ID: Adam Buxbaum
- Account Name: GenePoint
- Account Type: Customer - Channel
- Account Site: [Empty]
- Account Rating: Cold
- Annual Revenue \$: 30000000.00
- Employees: 265
- Industry: Biotechnology
- Account Phone: (650) 867-3450
- Account Fax: (650) 867-9895
- Website: www.genepoint.com
- Billing Street: 345 Shoreline Park, Mountain View, CA 94043, USA
- Billing City: Mountain View
- Billing State/Province: CA
- Billing Zip/Postal Code: [Empty]

Editing a List

To edit a List of records, the user must simply select the record they want to edit and then select one of the following three Display views:

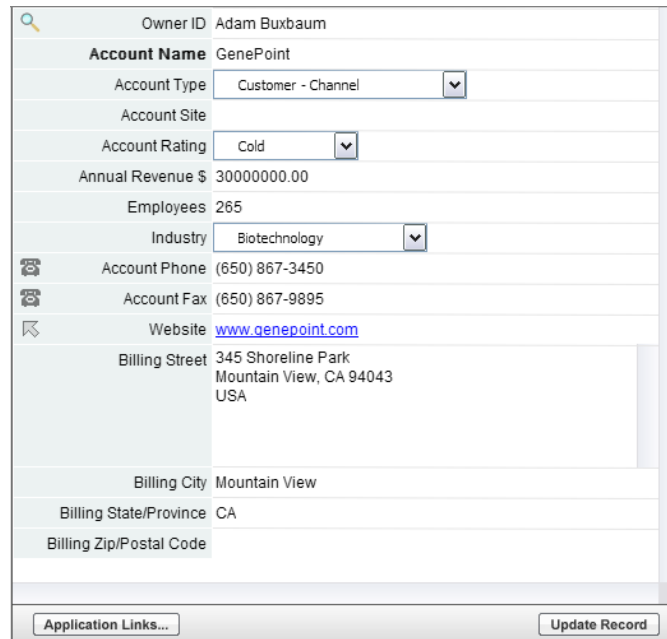
- Results + Related + Details
- Results + Details
- Results + Record Details

Once selected, the screen will display the records on the left and the details screen on the right.



This screenshot is identical to the one above, showing the 'Account List (unsaved)' interface with the 'GenePoint' account selected and its details displayed on the right.

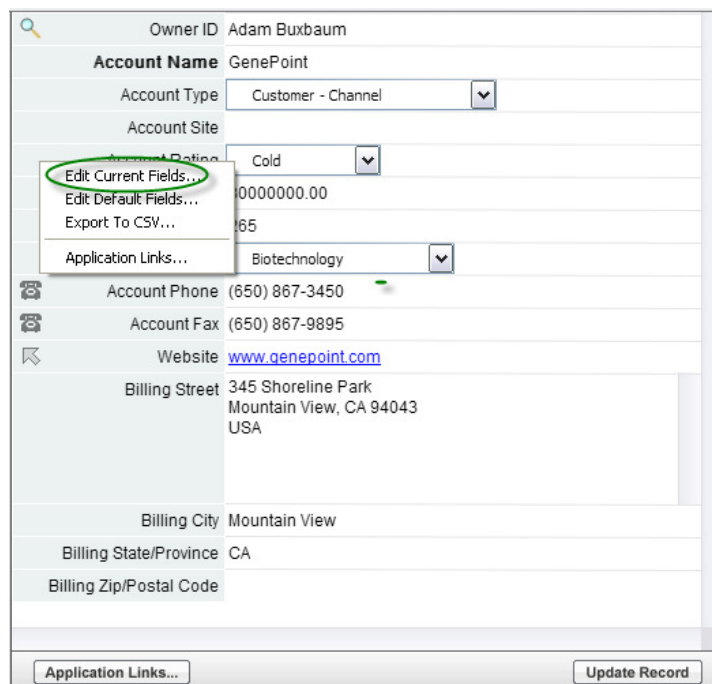
Here users can edit any of the existing directly in the details box. Once all edits have been completed, simply click on the Update Record button in the bottom right and the records will automatically be updated. **Note:** *TableTop is a native application to the SFDC platform. Therefore, if you are using TableTop on the SFDC platform, all records displayed are SFDC records so once the user clicks the Update Record button, the records in SFDC will be automatically updated as well.*



Owner ID	Adam Buxbaum
Account Name	GenePoint
Account Type	Customer - Channel
Account Site	
Account Rating	Cold
Annual Revenue \$	30000000.00
Employees	265
Industry	Biotechnology
Account Phone	(650) 867-3450
Account Fax	(650) 867-9895
Website	www.genepoint.com
Billing Street	345 Shoreline Park Mountain View, CA 94043 USA
Billing City	Mountain View
Billing State/Province	CA
Billing Zip/Postal Code	

Application Links... Update Record

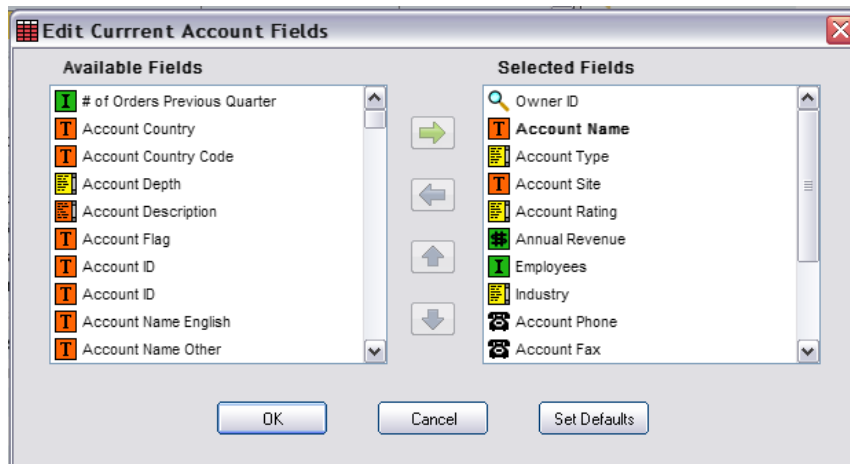
In addition, users can edit existing fields by right clicking on field name and selecting Edit Current Fields.



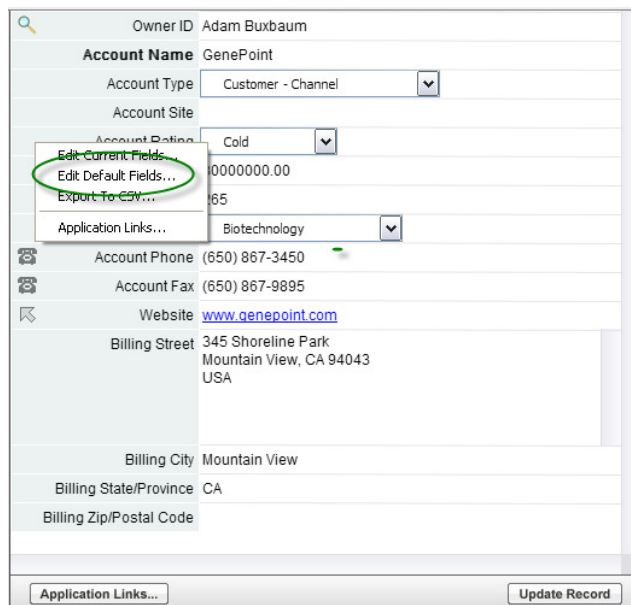
Owner ID	Adam Buxbaum
Account Name	GenePoint
Account Type	Customer - Channel
Account Site	
Account Rating	Cold
Annual Revenue \$	30000000.00
Employees	265
Industry	Biotechnology
Account Phone	(650) 867-3450
Account Fax	(650) 867-9895
Website	www.genepoint.com
Billing Street	345 Shoreline Park Mountain View, CA 94043 USA
Billing City	Mountain View
Billing State/Province	CA
Billing Zip/Postal Code	

Application Links... Update Record

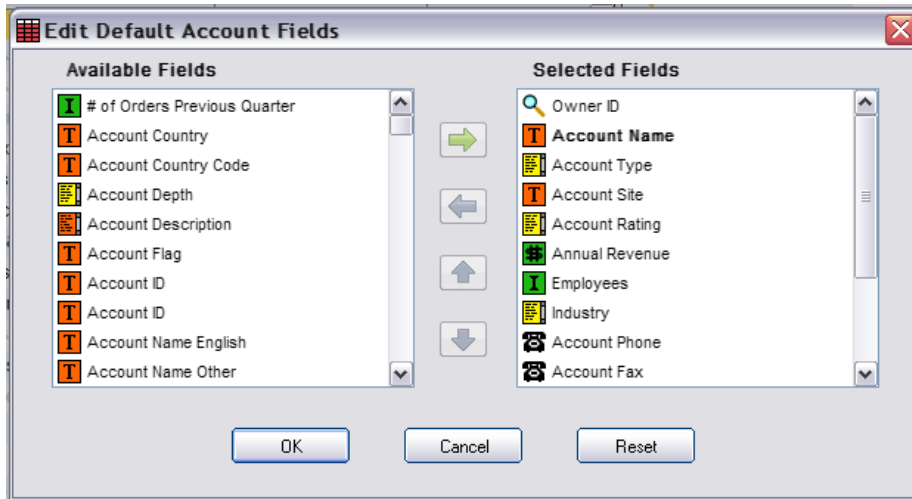
Once selected, the Edit Current Entity Fields dialog will appear, where the user can easily add fields by selecting the field from the Available Fields box and clicking the green arrow and moving it over to the Selected Fields box. Fields can easily be reordered by clicking on the blue up and down arrows. To remove fields simply select the field from the Selected Fields box and click the blue arrow and move it over to the Available Fields box.



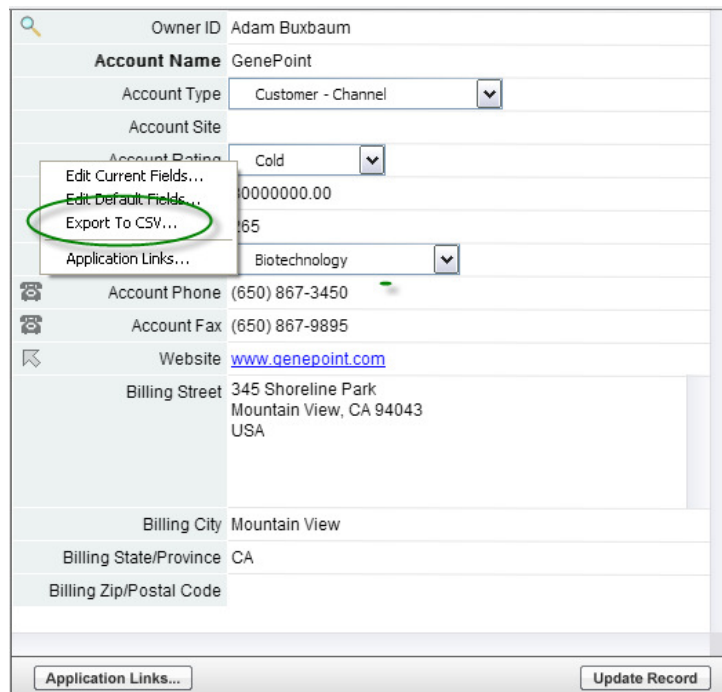
Users can also edit the default entity fields by simply right clicking on the field name and selecting the Edit Default Fields command.



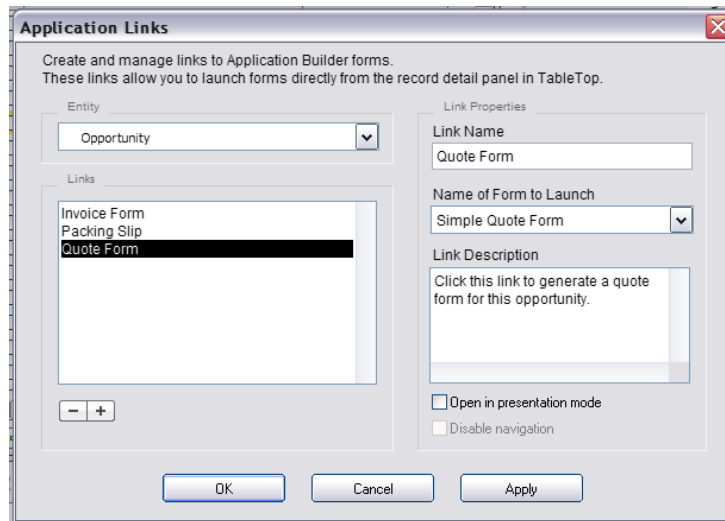
Once selected, the Edit Default Entity Fields dialog will appear, where the user can easily add, subtract or reorder fields in the appropriate box.



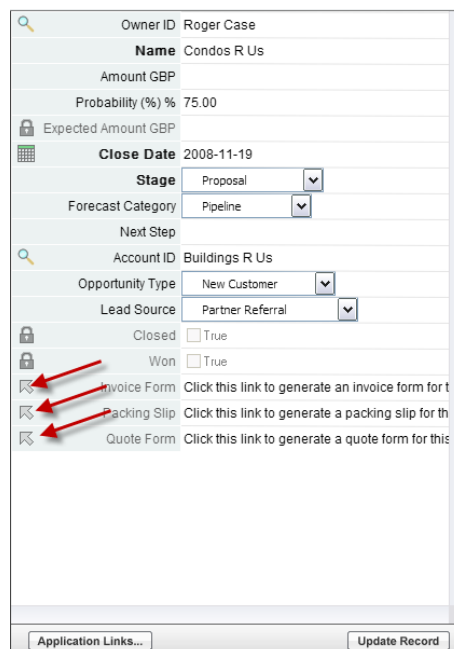
A List of records can easily be exported to a csv file by selecting the Export to CSV command from the right click Menu and saving the file to their desired location.



TableTop now provides users with the ability to create a link to an existing form created in FormFactory, and then launch the form from the record detail. To create a link to an existing form, the user must click on the Application Links button on the bottom of the details records box. The Application Links dialogue box will appear where users can select their desired entity from the drop down list in the top left. A list of currently linked live forms will appear in the Links box on the left side of the dialogue. This list automatically defaults to the business entity of the entity detail view. The user then selects their desired link and clicks the Apply button.

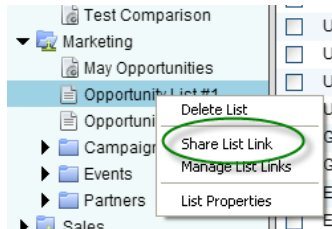


To launch a link, the user must simply click on the arrow next to the link at the bottom of the bottom of the details box. When the link is launched the selected record in the detail view will automatically populate the linked form.

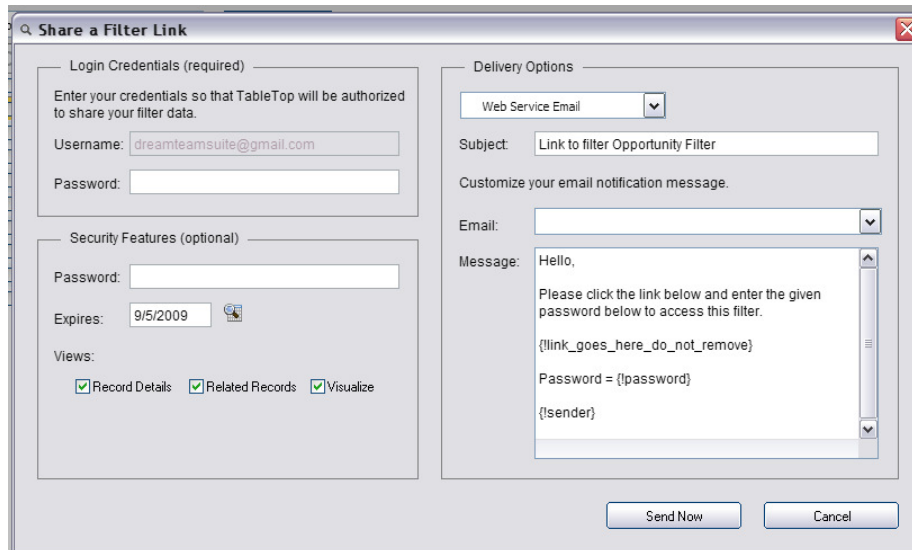


Sharing a List

Through the Active Links feature, Lists can easily be shared with anyone inside or outside your company. To share a List, simply right click on the folder and select the Share List Link command.



Once selected the Share a List Link dialog box will appear. Here the user must complete the following components:



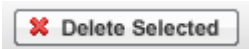
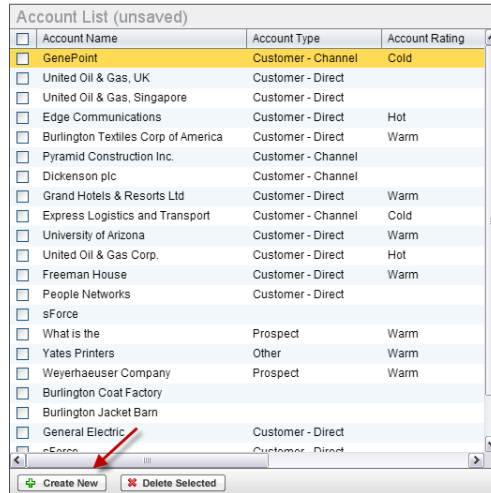
1. Enter their password in the box in the top left box. (**Note: If using TableTop on SFDC platform user must enter their Security Token directly after password**)
2. In the Security Features box, the user can add a password so that the end user must enter it to have access to the link. In addition, the user can add an expiration date to the link, as well as dictate what views they want the end user to have.
3. Next the user must select their Delivery Option. There are three options available including Web Service Email, Microsoft Outlook and Copy to Clipboard.
4. Next type the email address or multiple addresses in the assigned box.
5. Lastly, click the send button.

List Short Cuts

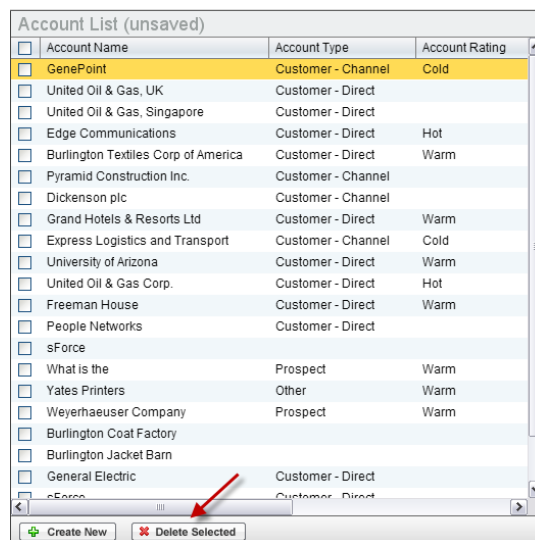
A number of short cuts have been added to assist users in managing their List of records including:



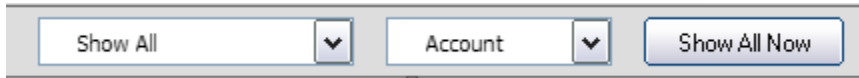
Users can create new records by clicking on the Create New button on the bottom of the dialog box.



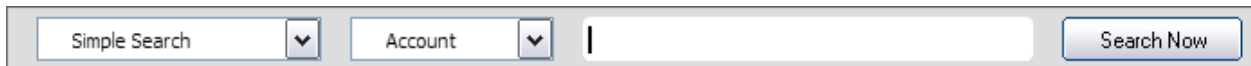
Users can delete records by selecting the record they want to delete and then clicking on the Delete Selected button on the bottom of the dialog box.



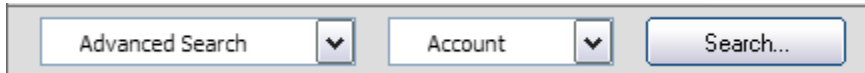
In the top left corner of the screen there is two drop down menus with four shortcut options including:



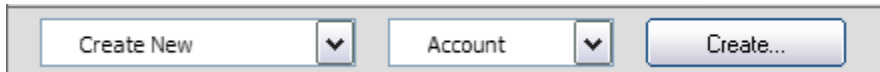
The first short cut enables users to display a list of all records for the desired entity. All the user must do is select Show All from the first drop down menu, and select the Entity from the second drop down menu and then finally click the Show All Now button and the list of records will be created.



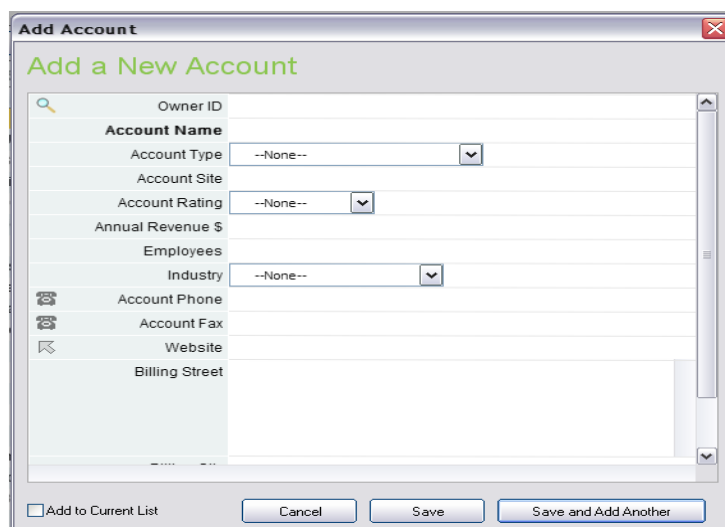
The second short cut enables users to create a simple search to search for a particular record. All the user must do is select Simple Search from the first drop down menu, and select the Entity and then type the name of the record they are searching for and click search now.



The third short cut enables users to initiate an Advanced Search for a particular record. All the user must do is select Advanced Search from the first drop down menu, and select the Entity and then type the name of the record they are searching for and click Search.



The fourth short cut enables users to create a new record. To create a new record, the User must select the Create new command from the first drop down menu, and select the Entity from the second drop down menu and then click the Create button. The Add Entity dialog will appear displaying the required fields. The user then has the option to save or save and create another record.



Reporting

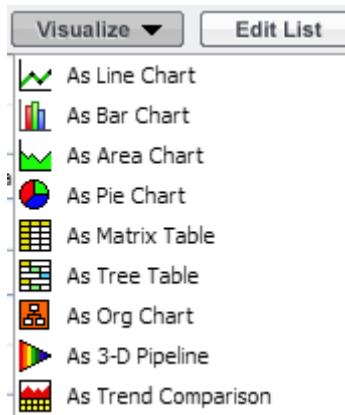
TableTop allows users to quickly visualize fully interactive views of data as drill down lists, charts, tables, org views, pipeline views, trend views, business form views, and a host of other rich views. Since it has full write-back capability, it goes well beyond reporting and dashboards and enables the rapid creation of departmental Cockpits on cloud databases.


Creating a Report or Dashboard

To create a report or a dashboard, the user must first create a list of records. Once the list of records has been created, then the user can click on the Visualize Menu on the right side of the screen and select the desired report or dashboard option.

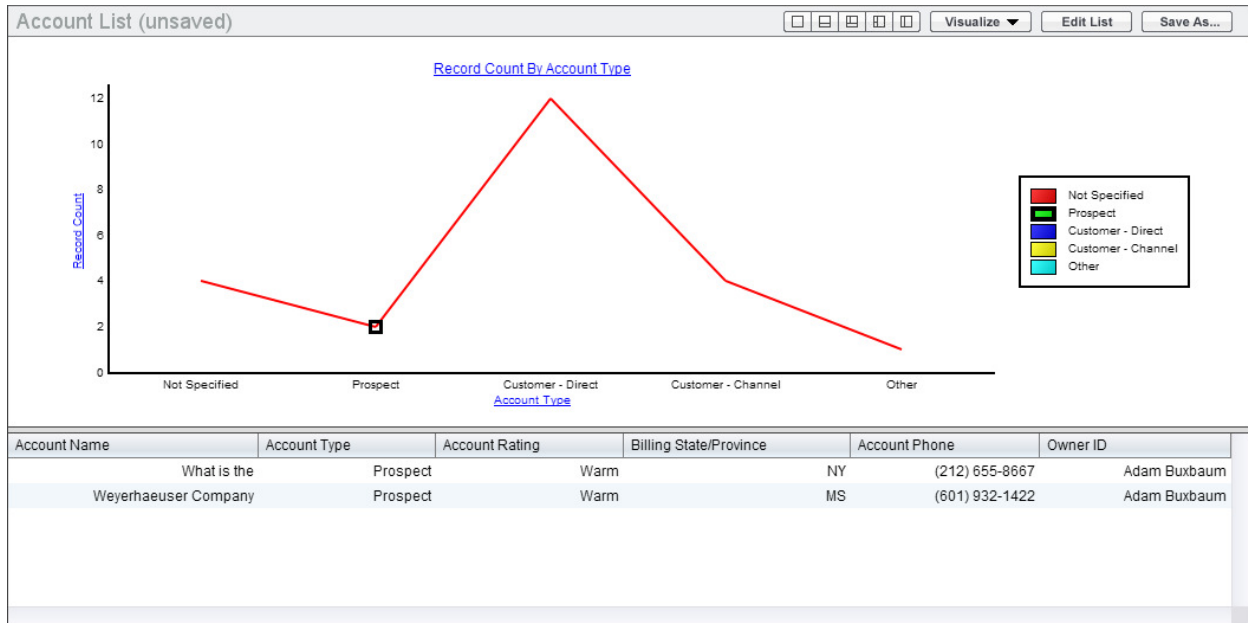
Account List (unsaved)						
Page: 1						
<input type="checkbox"/>	Account Name	Account Type	Account Rating	Billing State/Province	Account Phone	Owner ID
<input type="checkbox"/>	GenePoint	Customer - Channel	Cold	CA	(650) 867-3450	Adam Buxbaum
<input type="checkbox"/>	United Oil & Gas, UK	Customer - Direct		UK	+44 191 4956203	Adam Buxbaum
<input type="checkbox"/>	United Oil & Gas, Singapore	Customer - Direct		Singapore	(650) 450-8810	Adam Buxbaum
<input type="checkbox"/>	Edge Communications	Customer - Direct	Hot	TX	(512) 757-6000	Adam Buxbaum
<input type="checkbox"/>	Burlington Textiles Corp of America	Customer - Direct	Warm	NC	(336) 222-7000	Adam Buxbaum
<input type="checkbox"/>	Pyramid Construction Inc.	Customer - Channel			(014) 427-4427	Adam Buxbaum
<input type="checkbox"/>	Dickenson plc	Customer - Channel		KS	(785) 241-6200	Adam Buxbaum
<input type="checkbox"/>	Grand Hotels & Resorts Ltd	Customer - Direct	Warm	IL	(312) 596-1000	Adam Buxbaum
<input type="checkbox"/>	Express Logistics and Transport	Customer - Channel	Cold	OR	(503) 421-7800	Adam Buxbaum
<input type="checkbox"/>	University of Arizona	Customer - Direct	Warm	AZ	(520) 773-9050	Adam Buxbaum
<input type="checkbox"/>	United Oil & Gas Corp.	Customer - Direct	Hot	NY	(212) 842-5500	Adam Buxbaum
<input type="checkbox"/>	Freeman House	Customer - Direct	Warm		+44 (0)8450 546 503	Adam Buxbaum
<input type="checkbox"/>	People Networks	Customer - Direct		England	02079530038	Adam Buxbaum
<input type="checkbox"/>	sForce			CA	(415) 901-7000	Adam Buxbaum
<input type="checkbox"/>	What is the	Prospect	Warm	NY	(212) 655-8667	Adam Buxbaum
<input type="checkbox"/>	Yates Printers	Other	Warm	QC	(514) 726-2786	Adam Buxbaum
<input type="checkbox"/>	Weyerhaeuser Company	Prospect	Warm	MS	(601) 932-1422	Adam Buxbaum
<input type="checkbox"/>	Burlington Coat Factory			NY	212-555-1212	Adam Buxbaum
<input type="checkbox"/>	Burlington Jacket Barn			GA	678-555-1212	Adam Buxbaum
<input type="checkbox"/>	General Electric	Customer - Direct		CT	(203) 373-2211	Adam Buxbaum
<input type="checkbox"/>	sForce	Customer - Direct		CA	(415) 901 7000	Adam Buxbaum

The Visualize Menu provides the following reporting and dashboard options:

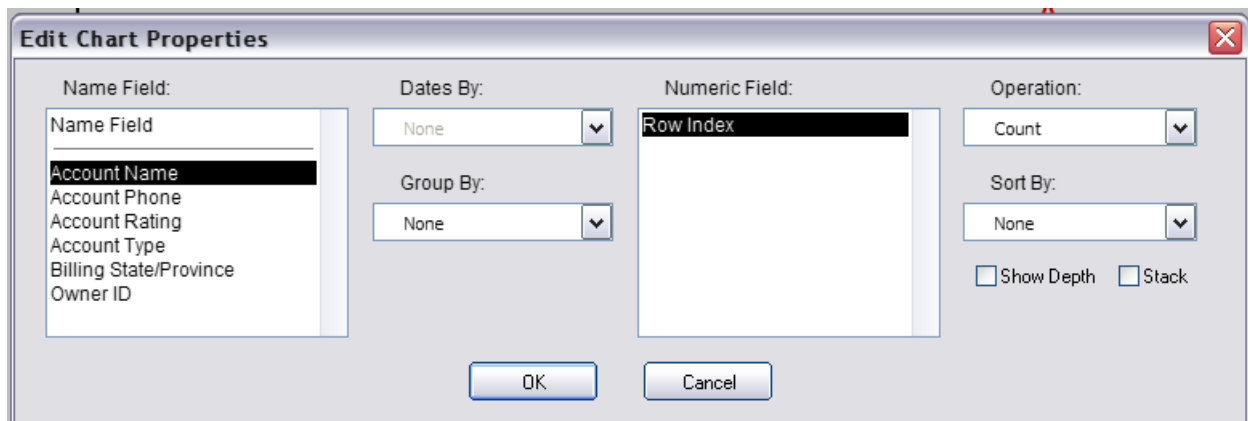


 As Line Chart

Line Chart – The first visualize option is a Line Chart. Users can easily create a Line Chart that displays data points displayed against X and Y axis and all of the points are connected with a single line. A Legend describing the categories is color coded and displayed in box on the right side of the screen. If the user clicks on one of the categories, a list of records tied with that category will appear in the dialog box at the bottom of the screen.




Users can easily edit the properties of the X and Y axis or both by simply clicking on the appropriate hyper link and selecting the desired criteria. The dialog below displays the options available for display.



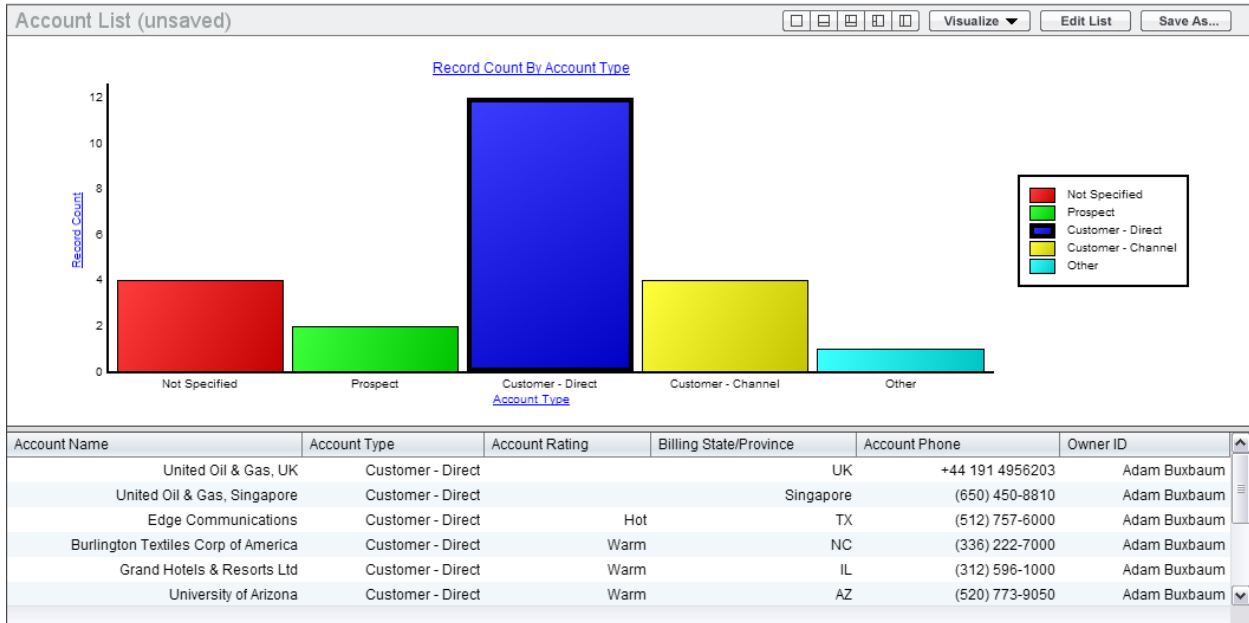
The screenshot shows a dialog box titled "Edit Chart Properties". It has several sections for configuring the chart:

- Name Field:** A list box containing "Name Field", "Account Name", "Account Phone", "Account Rating", "Account Type", "Billing State/Province", and "Owner ID". "Account Name" is selected.
- Dates By:** A dropdown menu with "None" selected.
- Group By:** A dropdown menu with "None" selected.
- Numeric Field:** A list box containing "Row Index".
- Operation:** A dropdown menu with "Count" selected.
- Sort By:** A dropdown menu with "None" selected.
- Checkboxes for "Show Depth" and "Stack" are present and unchecked.

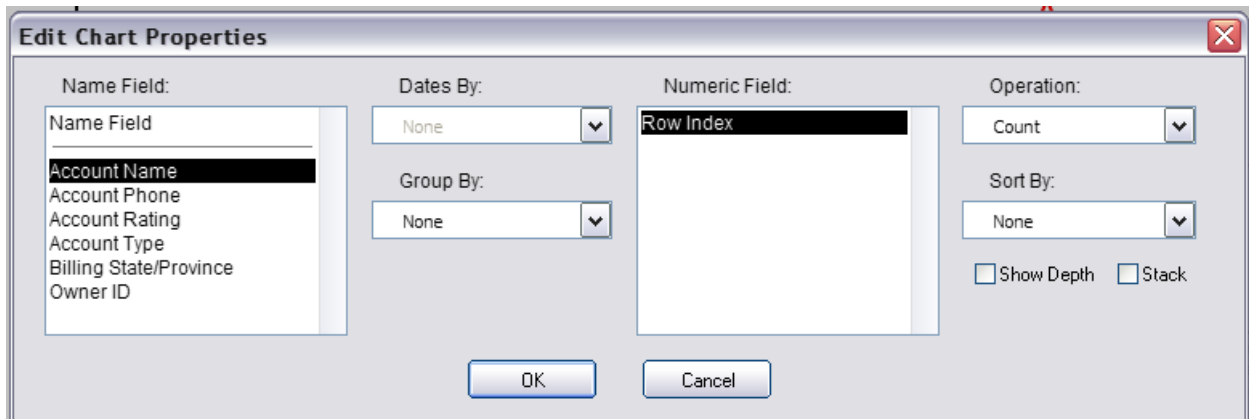
At the bottom of the dialog are "OK" and "Cancel" buttons.

 As Bar Chart

Bar Chart – The second visualize option is a Bar Chart. Users can easily create a Bar Chart that displays rectangular bars of lengths usually proportional to the values they represent. A Legend describing the categories is color coded and displayed in box on the right side of the screen. If the user clicks on one of the categories, a list of records tied with that category will appear in the dialog box at the bottom of the screen.




Similar to a Line Chart, users can easily edit the properties of the X and Y axis or both by simply clicking on the appropriate hyper link and selecting the desired criteria. The dialog below displays the options available for display.



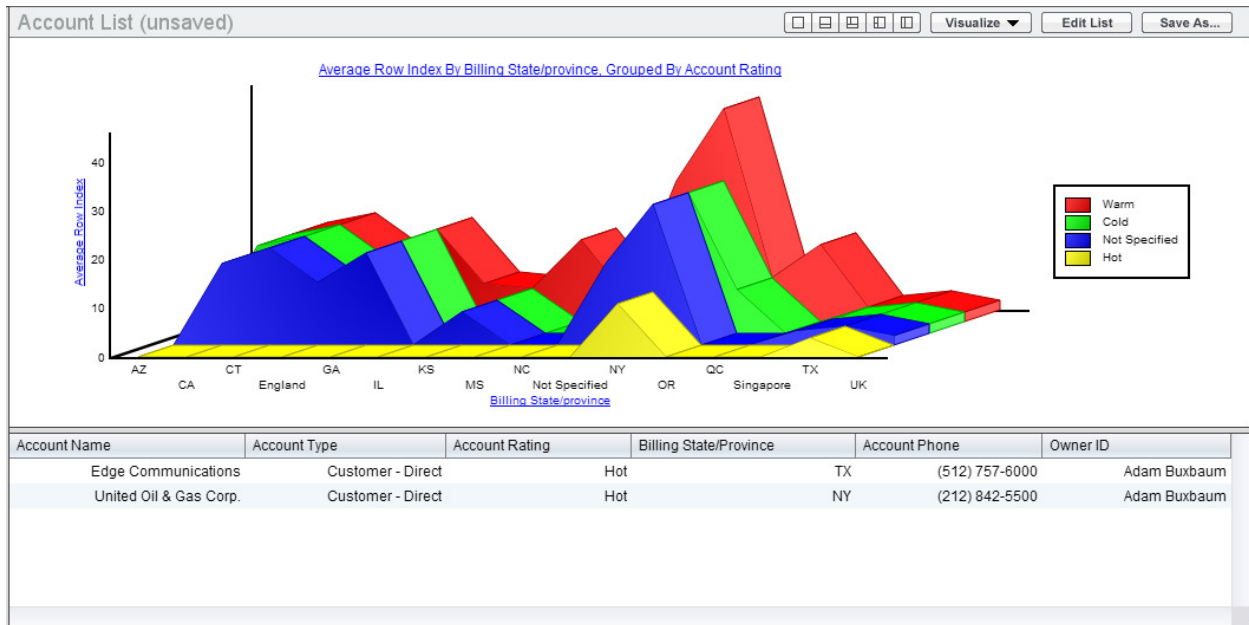
The "Edit Chart Properties" dialog box has the following fields and options:

- Name Field:** A list box containing "Name Field", "Account Name", "Account Phone", "Account Rating", "Account Type", "Billing State/Province", and "Owner ID". "Account Name" is selected.
- Dates By:** A dropdown menu with "None" selected.
- Group By:** A dropdown menu with "None" selected.
- Numeric Field:** A list box containing "Row Index". "Row Index" is selected.
- Operation:** A dropdown menu with "Count" selected.
- Sort By:** A dropdown menu with "None" selected.
- Show Depth:** (unchecked)
- Stack:** (unchecked)

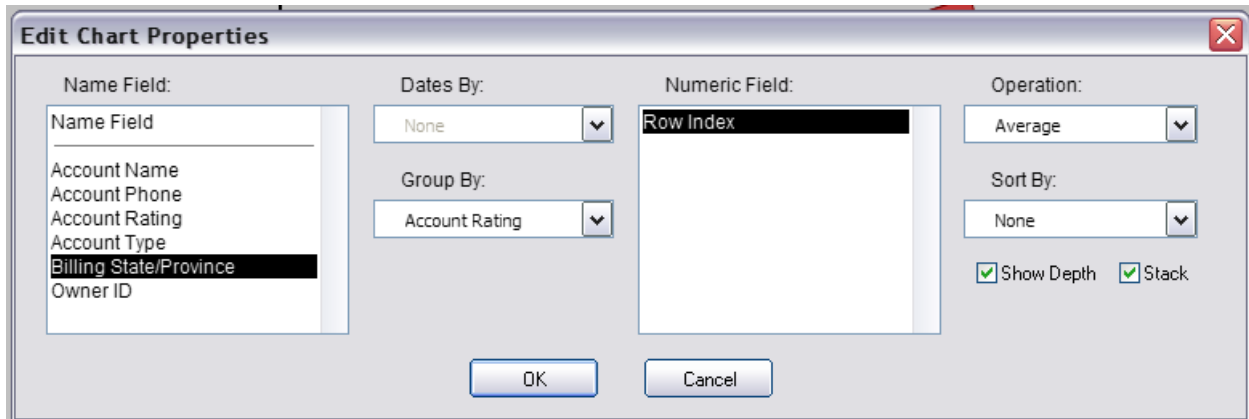
Buttons for "OK" and "Cancel" are at the bottom.

 As Area Chart

Area Chart – The third visualize option is an Area Chart. Users can easily create an Area Chart that displays graphically quantitative data. The area between axis and line are commonly emphasized with colors and textures. Commonly one compares with an area chart two or more quantities. A Legend describing the categories is color coded and displayed in box on the right side of the screen



Similar to a Line Chart and the Bar Chart, users can easily edit the properties of the X and Y axis or both by simply clicking on the appropriate hyper link and selecting the desired criteria. The dialog below displays the options available for display.



Edit Chart Properties

Name Field: [List: Name Field, Account Name, Account Phone, Account Rating, Account Type, **Billing State/Province**, Owner ID]

Dates By: [None]

Group By: [Account Rating]


Numeric Field: [Row Index]

Operation: [Average]

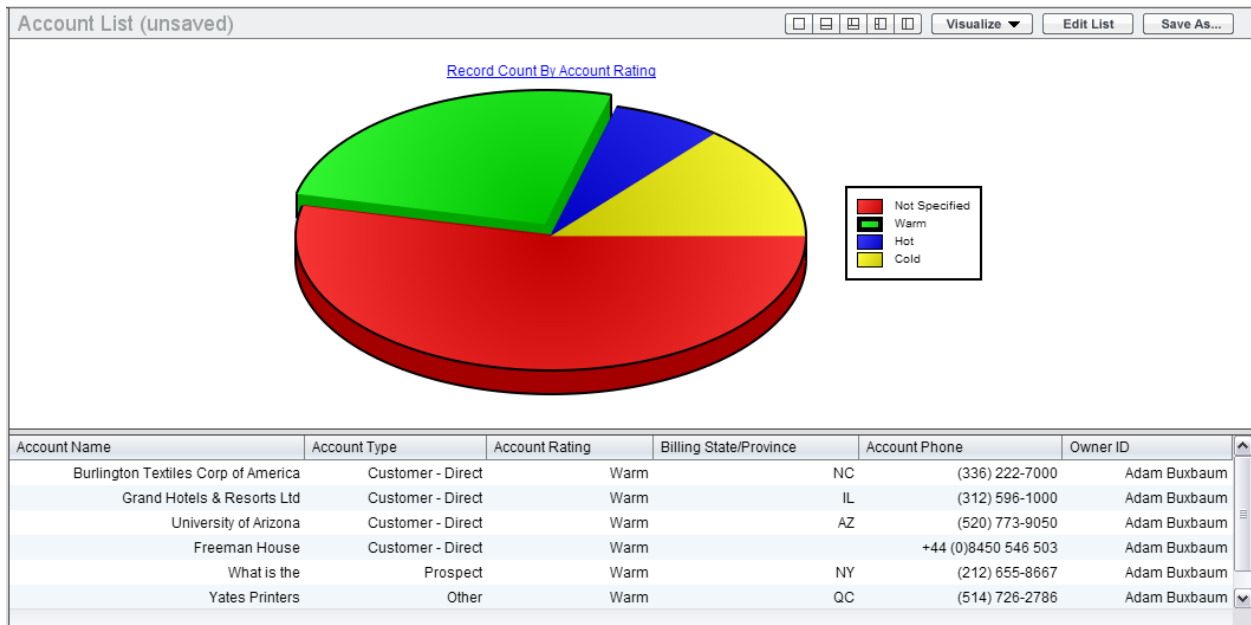
Sort By: [None]

Show Depth Stack

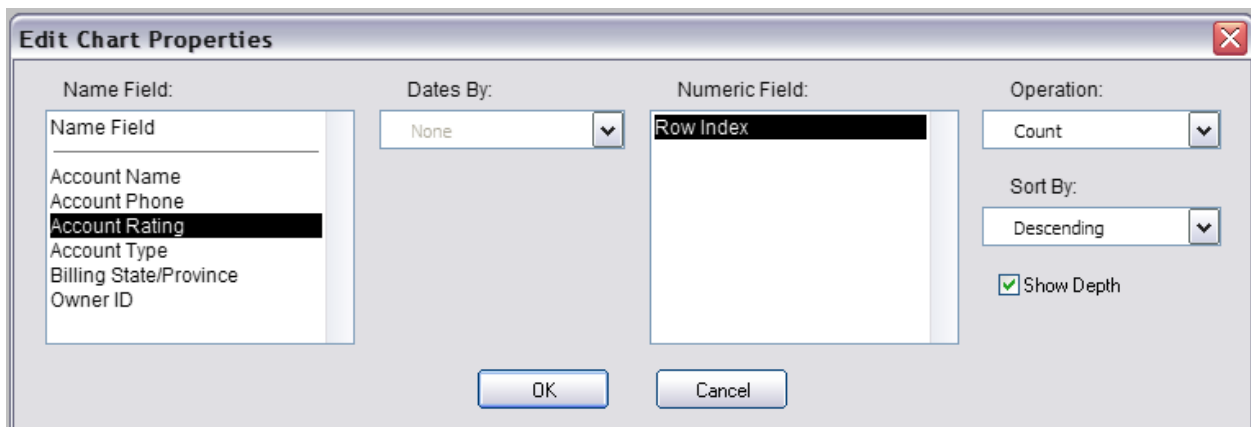
OK Cancel

 As Pie Chart

Pie Chart – The fourth visualize option is a Pie Chart. Users can easily create a Pie Chart that is a graphical display of data in which frequencies or percentages are represented as slices of a pie. A Pie Chart is often used to illustrate the relationship of parts to the whole. This makes a pie chart particularly useful for emphasizing one specific element of a whole. A Legend describing the categories is color coded and displayed in box on the right side of the screen. If the user clicks on one of the categories, a list of records tied with that category will appear in the dialog box at the bottom of the screen. **Note:** *The selected category is elevated in the pie chart.*



Users can easily edit the properties of the Pie Chart by simply clicking on the appropriate hyper link and selecting the desired criteria. The dialog below displays the options available for display.



Edit Chart Properties

Name Field: Account Rating

Dates By: None


Numeric Field: Row Index

Operation: Count

Sort By: Descending

Show Depth

OK Cancel

 As Matrix Table

Matrix Table – The fifth visualize option is a Matrix Table. Users can easily create a Matrix Table that displays two-dimensional data and summary statistics. A list of records will appear in box on the bottom once a specific category has been selected.

Opportunity List (unsaved) Visualize Edit List Save As...

[Stage](#)

	Closed Won	Evaluation	Id. Decision Makers	Needs Analysis	Negotiation/Review	Perception Analysis	Proposal/Price Quote	Prospecting	Quiz
Burlington Textiles Weaving Plant Generator					\$50,000,000.00				
Chelsea FC		\$35,000,000.00							
Dickenson Mobile Generators									\$1
Edge Emergency Generator	\$75,000.00		\$35,000.00						
Edge Installation	\$50,000.00								
Edge SLA	\$60,000.00								
Express Logistics Portable Truck Generators									
Express Logistics SLA						\$120,000.00			
Express Logistics Standby Generator	\$220,000.00								

[Total Amount](#)

Name	Amount	Close Date	Stage	Owner ID
Edge Installation	\$50,000.00	3/6/2006	Closed Won	Adam Buxbaum

Users can easily edit the properties of the Matrix Table by simply clicking on the hyperlink at the top of the screen to select the Column Fields, the hyperlink on the left to select the Row fields and the hyperlink on the bottom to select the Number fields.

Pick Column Field

Fields: Dates By:

Close Date
Name
Owner ID
Stage

OK Cancel

Pick Row Field

Fields: Dates By:

Close Date
Name
Owner ID
Stage

OK Cancel


Pick Number Field

Fields: Operation:

Amount

Format:

OK Cancel

 As Tree Table

Tree Table – The sixth visualize option is a Tree Table. Users can easily create a Tree Table that displays three dimensional data and summary statistics. A list of records will appear in box on the bottom once a specific category has been selected.

Opportunity List (unsaved)		Visualize ▼	Edit List	Save As...
Stage	Total Amount			
Closed Won	\$3,410,000.00			
Evaluation	\$35,000,000.00			
Id. Decision Makers	\$110,000.00			
Needs Analysis	\$675,000.00			
Negotiation/Review	\$50,395,000.00			
Perception Analysis	\$120,000.00			
Proposal/Price Quote	\$370,000.00			
Prospecting	\$100,000.00			
Qualification	\$15,000.00			
Value Proposition	\$330,000.00			

Name	Amount	Close Date	Stage	Owner ID
Pyramid Emergency Generators	\$100,000.00	3/6/2006	Prospecting	Adam Buxbaum
Global Zone Software		7/1/2009	Prospecting	Adam Buxbaum

Users can easily edit the properties of the Tree Table by simply clicking on the first hyperlink at the top of the screen to select the Name Field and then on the second hyperlink at the top of the screen to select the Number field.

Pick Name Field 1 ✖

Fields:

- Close Date
- Name
- Owner ID
- Stage**


Dates By: Days ▼

Pick Number Field 1 ✖

Fields:

- Amount**

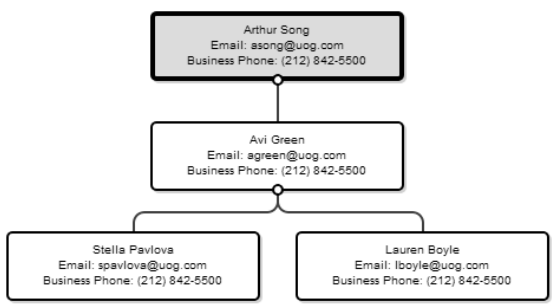
Operation: Sum ▼

 As Org Chart

Org Chart – The seventh visualize option is an Org Chart. Users can easily create an Org Chart for both Accounts and Contacts. This feature provides a graphical “org” view of account, contact or user hierarchies within their workspace or Org.

Contact List (unsaved) Visualize Edit List Save As...

[Contact Chart Settings...](#)



First Name	Contact ID	Last Name	Account ID	Title	Business Phone	Email	Owner ID
Arthur	0038000000VcbDuAAJ	Song	United Oil & Gas Corp.	CEO	(212) 842-5500	asong@uog.com	Adam Buxbaum
Avi	0038000000VcbDzAAJ	Green	United Oil & Gas Corp.	CFO	(212) 842-5500	agreen@uog.com	Adam Buxbaum
Stella	0038000000VcbDpAAJ	Pavlova	United Oil & Gas Corp.	SVP, Production	(212) 842-5500	spavlova@uog.com	Adam Buxbaum
Lauren	0038000000VcbDqAAJ	Boyle	United Oil & Gas Corp.	SVP, Technology	(212) 842-5500	lboyle@uog.com	Adam Buxbaum

Users can easily edit the properties of the Org Chart by simply clicking on the Account/Contact Chart Settings hyperlink at the top of the screen. Here users can select information they want to display from a number of fields.

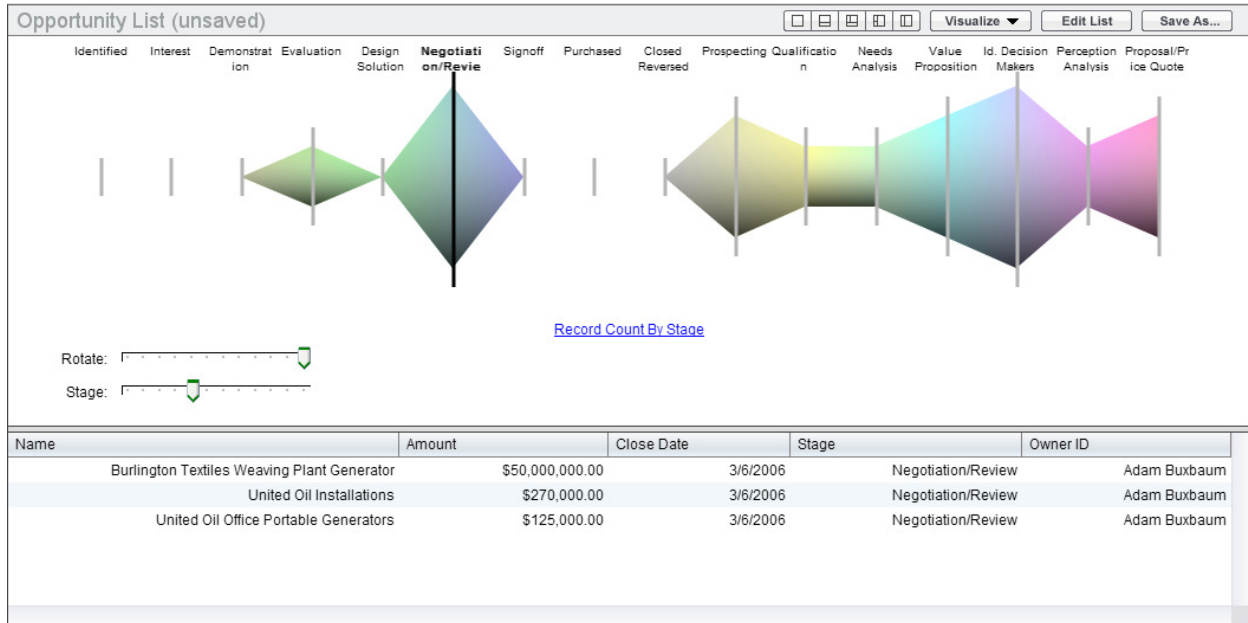
Chart Settings ✕

Display Field One: <input type="text" value="Email"/>	Tooltip Field One: <input type="text" value="--None--"/>
Display Field Two: <input type="text" value="Business Phone"/>	Tooltip Field Two: <input type="text" value="--None--"/>
Display Field Three: <input type="text" value="--None--"/>	Tooltip Field Three: <input type="text" value="--None--"/>
Display Field Four: <input type="text" value="--None--"/>	Tooltip Field Four: <input type="text" value="--None--"/>
Display Field Five: <input type="text" value="--None--"/>	Tooltip Field Five: <input type="text" value="--None--"/>
Recursive Link Field: <input type="text" value="Reports To ID"/>	Colorize Group: <input type="text" value="--None--"/>

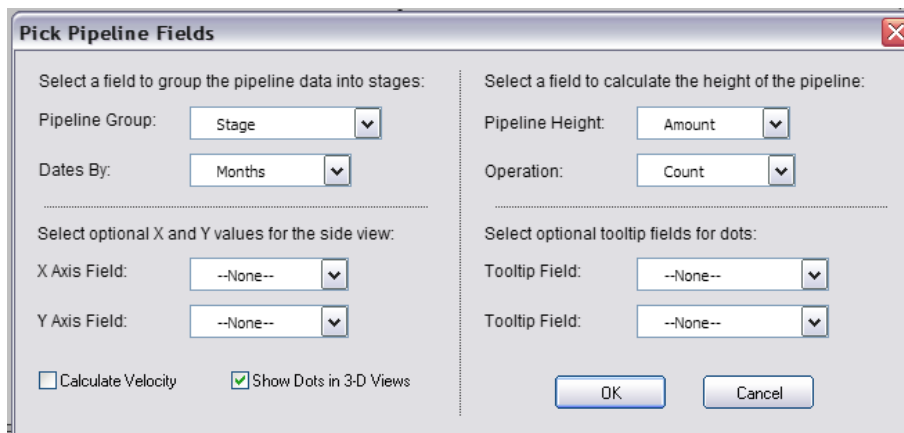
Show view controls

▶ As 3-D Pipeline

3-D Sales Pipeline – The eighth visualize option is a 3-D Pipeline. Users can easily create a 3-D Pipeline report to visualize opportunities as a sales funnel showing both pipeline shape and velocity in highly interactive three dimensional views. Rotate the pipeline in real-time and click on any of the opportunities in the view for drill down. A list of records will appear in box on the bottom once a specific category has been selected.



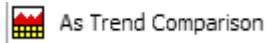
Users can easily edit the properties of the 3-D Sales Pipeline by simply clicking on the hyperlink at the bottom of the screen and selecting the appropriate options in the Pick Pipeline Fields dialog.



The 'Pick Pipeline Fields' dialog box contains the following configuration options:

- Select a field to group the pipeline data into stages:** Pipeline Group: Stage
- Dates By:** Months
- Select optional X and Y values for the side view:** X Axis Field: --None--; Y Axis Field: --None--
- Calculate Velocity
- Show Dots in 3-D Views
- Select a field to calculate the height of the pipeline:** Pipeline Height: Amount
- Operation:** Count
- Select optional tooltip fields for dots:** Tooltip Field: --None--; Tooltip Field: --None--

Buttons: OK, Cancel

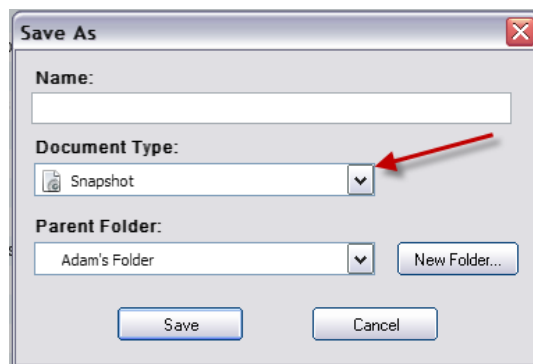


Trend Comparison – The ninth and final visualize option is the Trend Comparison. Users can easily create a Trend Comparison report to see changes between time-stamped snapshots and current activity. It’s a great tool for visualizing change in forecasts, or any set of data where you want to know what has been added, deleted, or modified.

Opportunity Snapshot (August Opps)		Current Snapshot	
Opportunity Snapshot (Updated Opportunities)		<ul style="list-style-type: none"> ▼ Chelsea FC <ul style="list-style-type: none"> Amount: \$35,000,000.00 Close Date: 9/1/2009 Name: Chelsea FC Owner ID: Adam Buxbaum Stage: Evaluation ▼ Burlington Textiles Weaving Plant Generator <ul style="list-style-type: none"> Amount: \$235,000.00 Stage: Closed Won 	
		<ul style="list-style-type: none"> ▼ Burlington Textiles Weaving Plant Generator <ul style="list-style-type: none"> Amount: \$50,000,000.00 Stage: Negotiation/Review 	

To enable the trend feature the user must:

1. Create an Opportunity List.
2. Add a new opportunity and save to the existing list
3. Click on the Save As button in the top right corner
4. In the Save As dialog, select Snapshot from the Document Type drop down menu and click save.

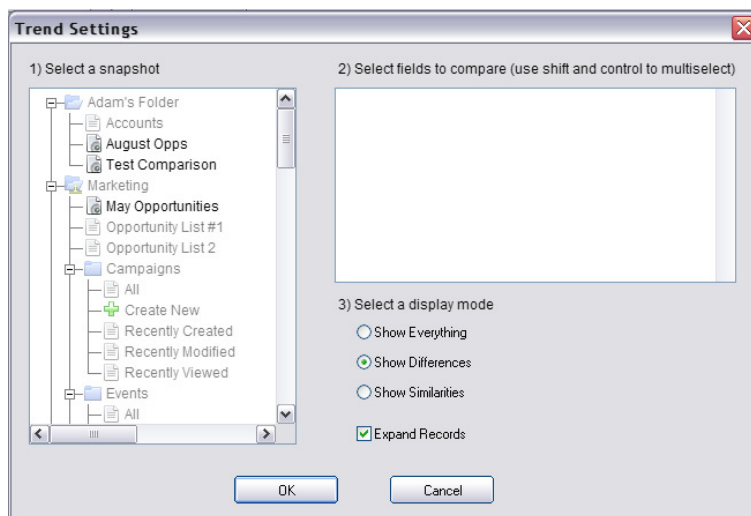


5. Display all Opportunities again
6. Click on the Visualize Menu and select Trend Comparison

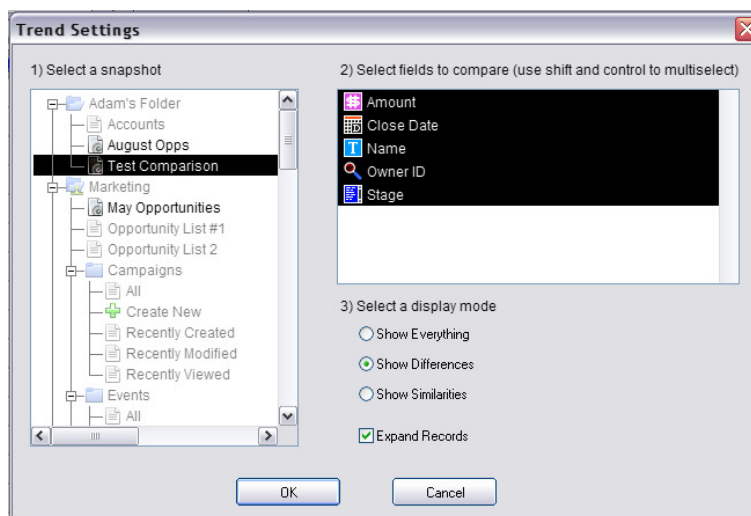
7. The Trend Settings dialog box will appear. Here users can select the Snapshot they want to compare and then select to display one of the follow three options:

- A. Show Everything
- B. Show Differences
- C. Show Similarities

Users also have the ability to expand records. Click Ok when done.



8. Once the user selects the Snapshot they want to compare, a list of fields will appear in the dialog box in the top right. Here users can select a specific field they want to compare.



Once the user clicks the OK button, the comparison will appear displaying all differences in red.

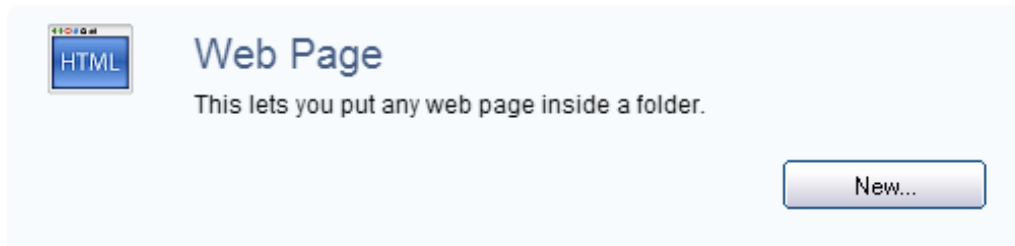
Opportunity List (unsaved)		Current List											
Opportunity Snapshot (May Opportunities)		<div style="text-align: right;"> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> Visualize ▼ Edit List Save As...											
		▼ Test opportunity <table border="1"> <tr><td>Amount:</td><td>\$50,000.00</td></tr> <tr><td>Close Date:</td><td>8/31/2009</td></tr> <tr><td>Name:</td><td>Test opportunity</td></tr> <tr><td>Owner ID:</td><td>Adam Buxbaum</td></tr> <tr><td>Stage:</td><td>Identified</td></tr> </table>		Amount:	\$50,000.00	Close Date:	8/31/2009	Name:	Test opportunity	Owner ID:	Adam Buxbaum	Stage:	Identified
Amount:	\$50,000.00												
Close Date:	8/31/2009												
Name:	Test opportunity												
Owner ID:	Adam Buxbaum												
Stage:	Identified												
		▼ Chelsea FC <table border="1"> <tr><td>Amount:</td><td>\$35,000,000.00</td></tr> <tr><td>Close Date:</td><td>9/1/2009</td></tr> <tr><td>Name:</td><td>Chelsea FC</td></tr> <tr><td>Owner ID:</td><td>Adam Buxbaum</td></tr> <tr><td>Stage:</td><td>Evaluation</td></tr> </table>		Amount:	\$35,000,000.00	Close Date:	9/1/2009	Name:	Chelsea FC	Owner ID:	Adam Buxbaum	Stage:	Evaluation
Amount:	\$35,000,000.00												
Close Date:	9/1/2009												
Name:	Chelsea FC												
Owner ID:	Adam Buxbaum												
Stage:	Evaluation												
▼ Burlington Textiles Weaving Plant Generator <table border="1"> <tr><td>Amount:</td><td>\$235,000.00</td></tr> <tr><td>Stage:</td><td>Closed Won</td></tr> </table>		Amount:	\$235,000.00	Stage:	Closed Won	▼ Burlington Textiles Weaving Plant Generator <table border="1"> <tr><td>Amount:</td><td>\$50,000,000.00</td></tr> <tr><td>Stage:</td><td>Negotiation/Review</td></tr> </table>		Amount:	\$50,000,000.00	Stage:	Negotiation/Review		
Amount:	\$235,000.00												
Stage:	Closed Won												
Amount:	\$50,000,000.00												
Stage:	Negotiation/Review												

Web Page

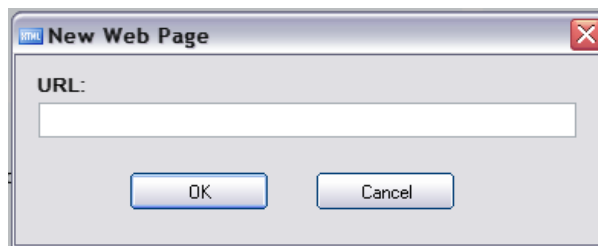
TableTop allows users to easily create quick links to web pages that they visit frequently.

Creating a Web Page

Creating a link to a Web Page is easy. To create a link to a Web Page, simply click on the “New” button on the Home Page.



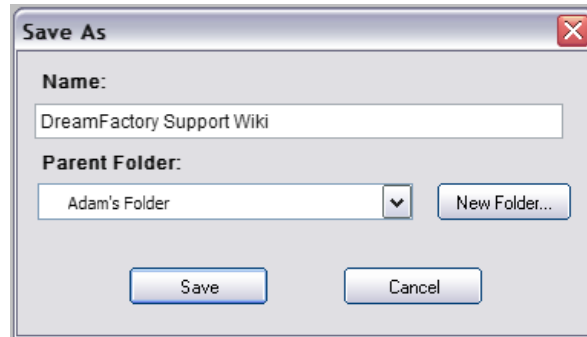
The New Web Page dialog will appear where the user can type the Web Page URL and then click OK.



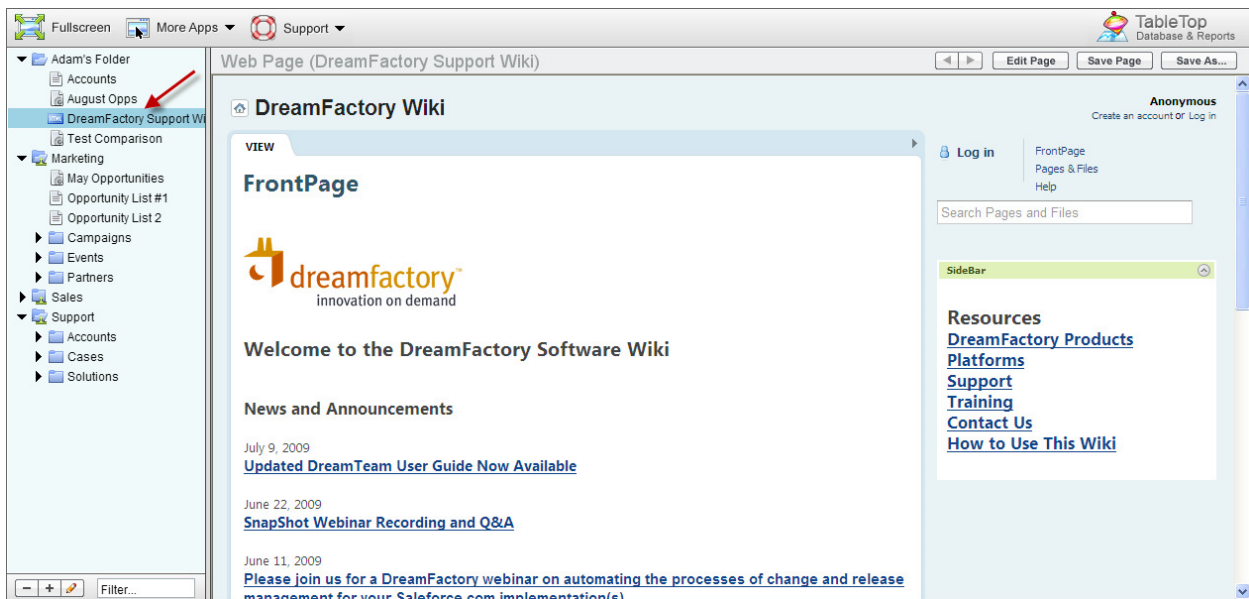
The Web Page will automatically load once created.



To save the Web Page click on the Save As button. Users are then prompted to give the Web Page a name and select the Folder they want to store it in.



Once the web page is saved, to access the web page, the user can open the folder and click on the link to launch the web page.

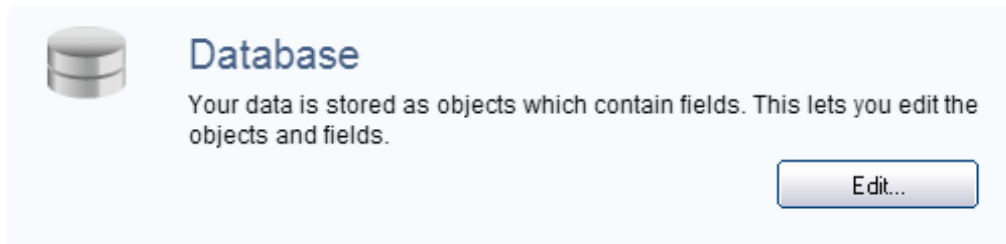


Database

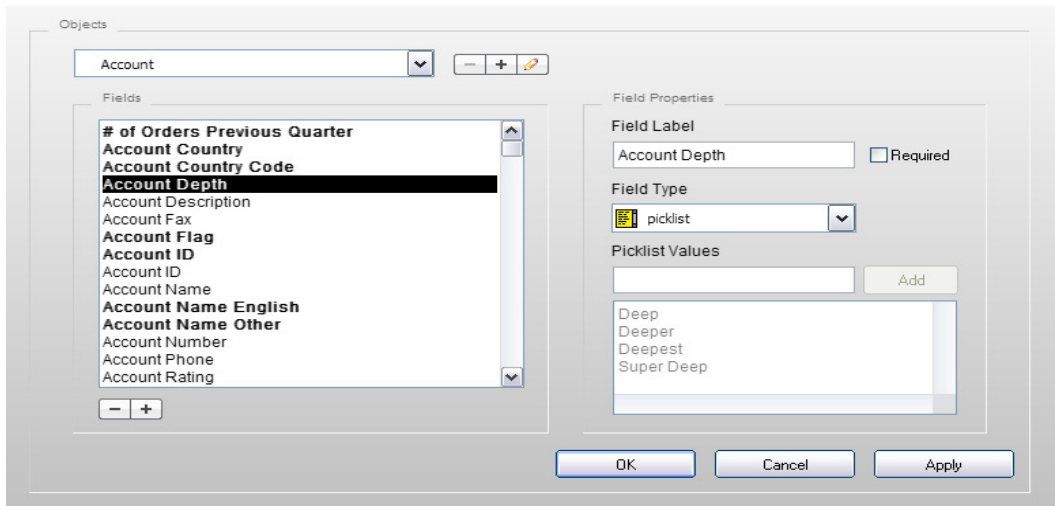
TableTop enables users to easily make manual edits to the database.

Editing Custom Fields

Editing custom fields is easy to do. To edit a custom field simply click on the Edit button from the Home Page



Once the user clicks on the Edit button, the Database dialog will appear. Here the user can select their desired Object and field that they want to edit. Only custom fields can be edited. Standard fields are not able to be edited.

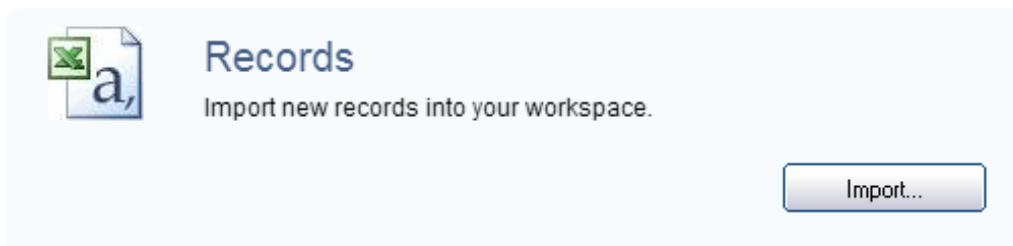


Records

The sixth component is to import records in from an alternate source. Here users can easily import records into TableTop via a csv file from an alternate database.

Importing Records into TableTop

Importing records into TableTop from an alternative database is easy. The file must be in a csv format in order to be imported into TableTop. To import a csv file into TableTop simply click on the Import button on the Home Page.



Once selected, the Import Records dialog will appear. To import a csv file in to TableTop, the user must click on the Choose File button and then select the csv file. Then the user must map the fields to the corresponding fields within TableTop directly in the Field Mapping dialog box. Once finished, click the Import button and the file will be imported into TableTop.

