TableTop User Guide

By Adam Buxbaum
7/9/10

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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 the first "webtop for cloud data" that allows users to quickly create powerful, interactive reports to track performance and easily analyze other key business data. Featuring full write-back capability, TableTop goes beyond standard reporting and dashboarding tool and enables the rapid creation of powerful reports, detailed dashboards and fully interactive performance trackers. 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.

The goal of TableTop is to help users by focusing on the following functionality:

1. Advanced reports and dashboards
2. Collaborative performance tracking
3. Data Analysis
4. Advanced visualization

The addition of advanced reporting tools has separated TableTop into the following two editions.

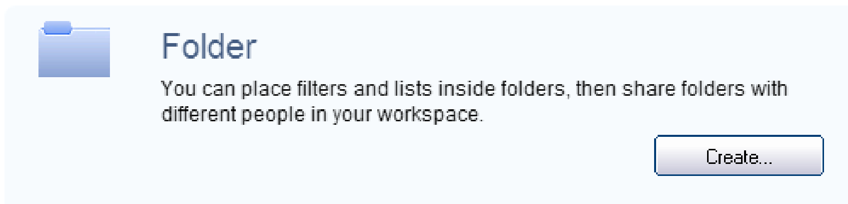
TableTop Free - The Free version of TableTop enables features collaborative data input and enables you to easily create lists and filters that can be saved and used to track key performance metrics.
The Free version of TableTop allows users to create Bar charts, Pie charts, Line charts and Area charts through the Actions Menu.

TableTop Professional – The Professional version of TableTop incorporates all of the features of the free version, but then adds the ability to create more advanced reports and dashboards including: Matrix Table, Tree Table, Org Chart, 3-D Pipeline, Trending, Exception Report, Merge Data Views and create Cell Calculations.

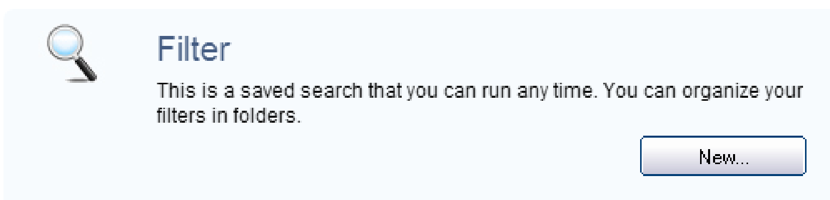
Components

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.

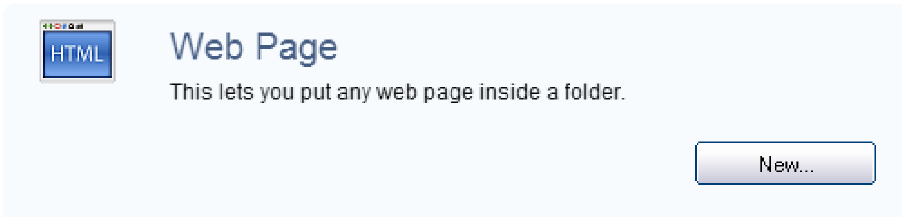


Filter –TableTop enables users to create views of records based on filtering criteria and save these views in a folder. Users can easily create cascading filters to create very specific business views. A filter returns the most up to date set of records each time it is run.

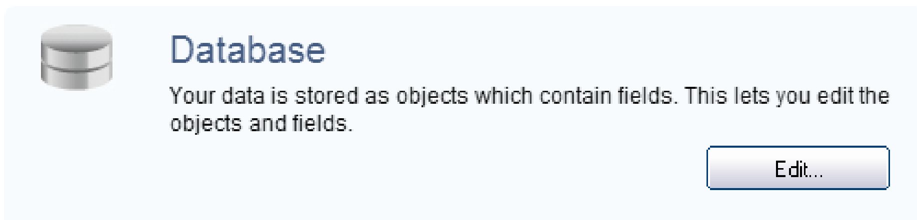


List – Lists behave like a filter but they are confined to a defined set of records. Lists can be created by adding records to the list to track or by starting with a filter and then saving as a defined list. Like filters, lists are “live” and always looking at the most recent state of the data. A Snapshot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

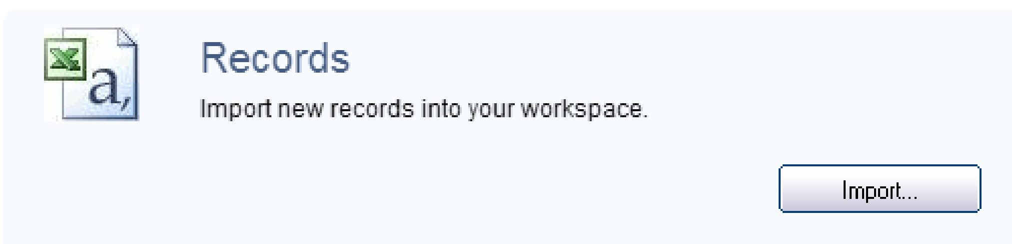
Web Page – Users can create quick access links to web pages that they use frequently and store them in folders.



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



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

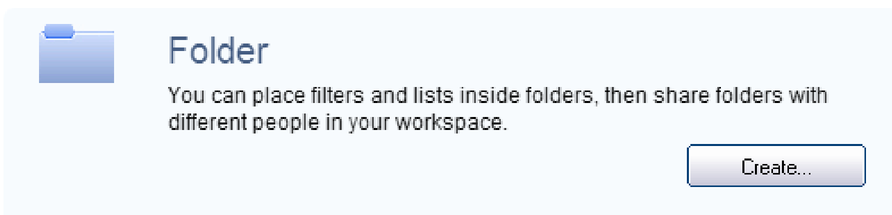


Folder

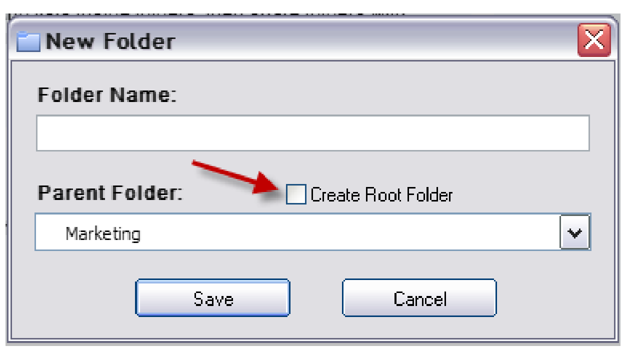
Similar to a desktop metaphor, folders are created to organize all of your data views - filters, lists, web pages, snapshots and more. All Folders can be accessed on the left hand navigation panel. Users can easily share folders with other users in the same Org/Workspace and also dictate access rights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

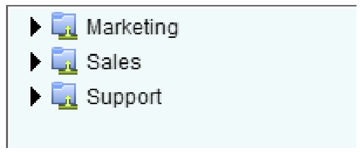


Once clicked, the New Folder dialog box will appear. Here the user can give the folder a name, choose whether the folder will be a Root Folder (Parent folder containing multiple sub folders) or a sub folder. To create the Root Folder simply check the box next to Create Root Folder; otherwise, select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

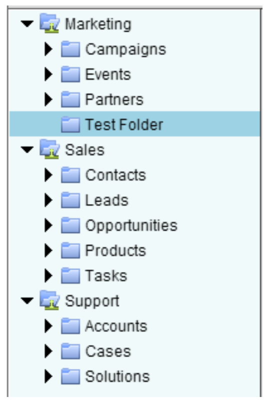


When a user first access TableTop, they will notice that there are three root folders displayed on the left hand navigation bar. These three root folders include:

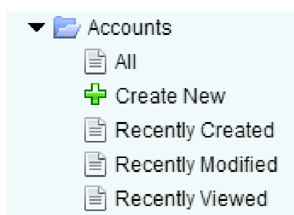
Marketing
Sales
Support



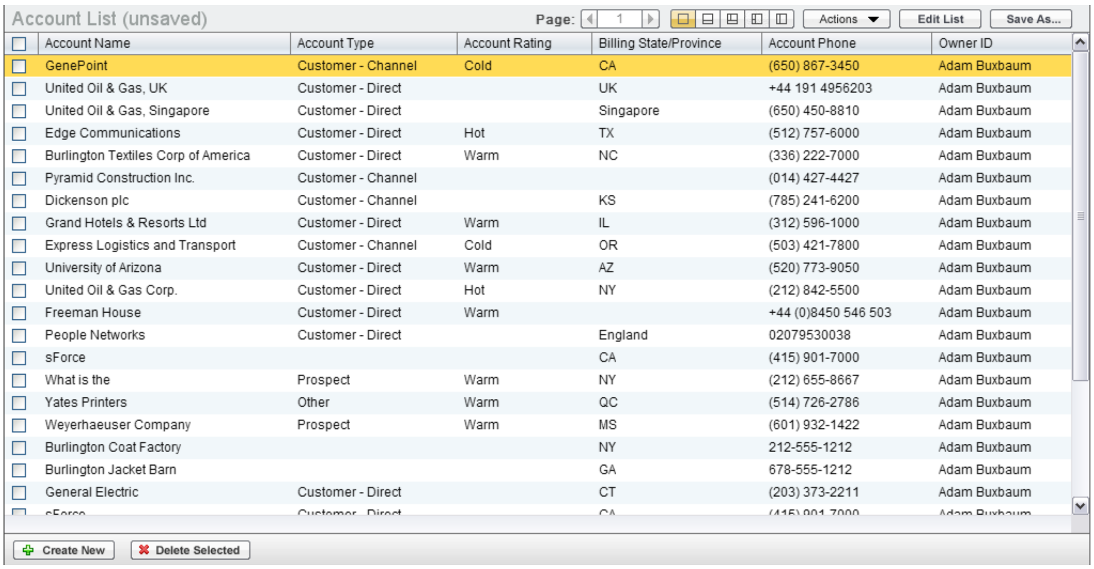
Each of the root folders contains a sub folders created for each entity with the Org. All custom folders are displayed here as well.



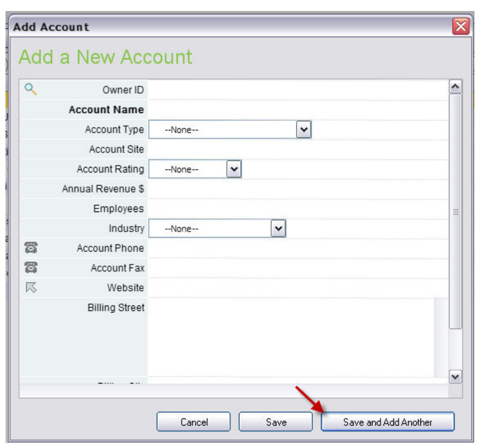
Within each Sub folder, there are five options that a user can select from including:



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. Users 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 Actions drop down menu.



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.



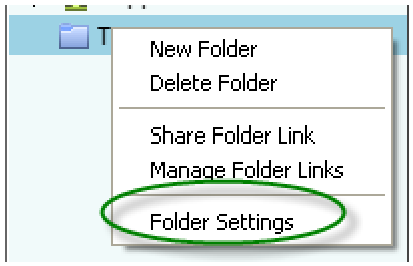
Recently Created – Selecting this option will display a list of records that have been recently created.

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

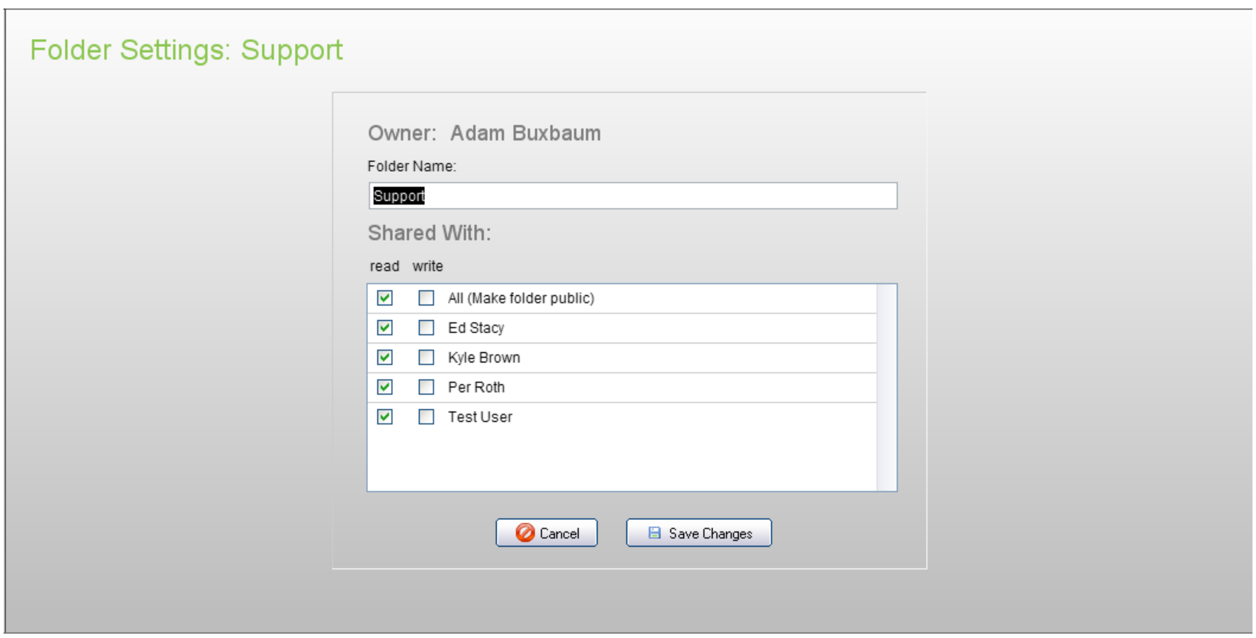
Recently Viewed –Selecting this option will display a list of records that have recently been viewed.

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.



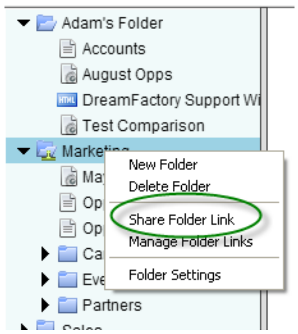
Once selected, the Folder Settings dialog will appear where user can easily assign read/write access. Users can also check the boxes next to All to make the folder public.



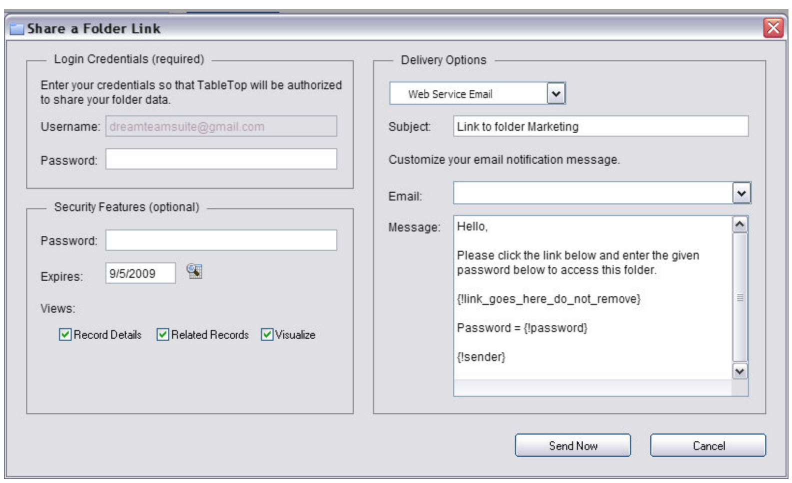
On the left hand navigation panel, a green icon located at the bottom of the Folder indicates that the document has been shared with other users.

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:



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.

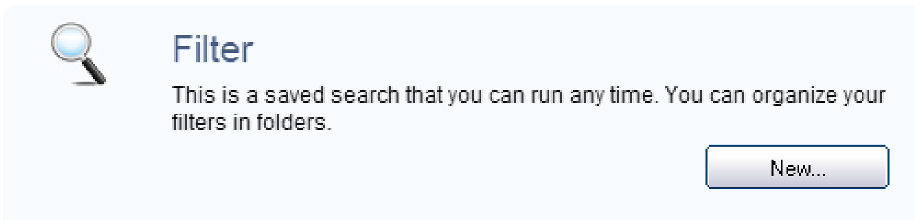
Users can filter for specific folders by simply typing the folder name in the Filter box.

Filters

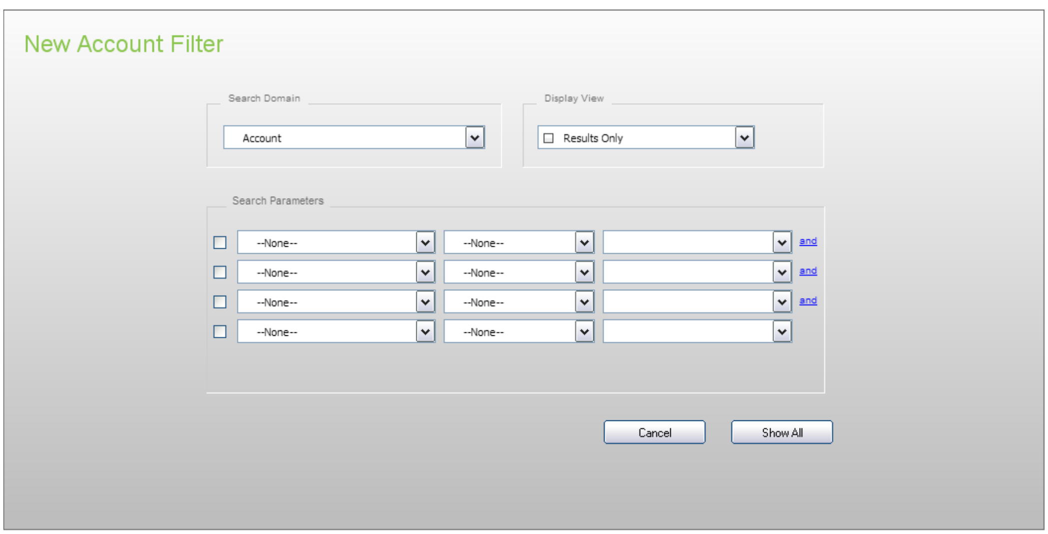
TableTop enables users to create views of records based on filtering criteria and save these views in a folder. Users can easily create cascading filters to create very specific business views. A filter returns the most up to date set of records each time it is run.

Creating a Filter

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

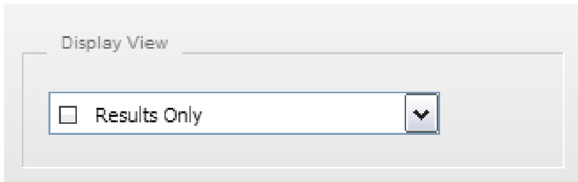


The New Entity Filter dialog will appear. Here users can select the desired entity that they want to display the records for from the first drop down menu.



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.

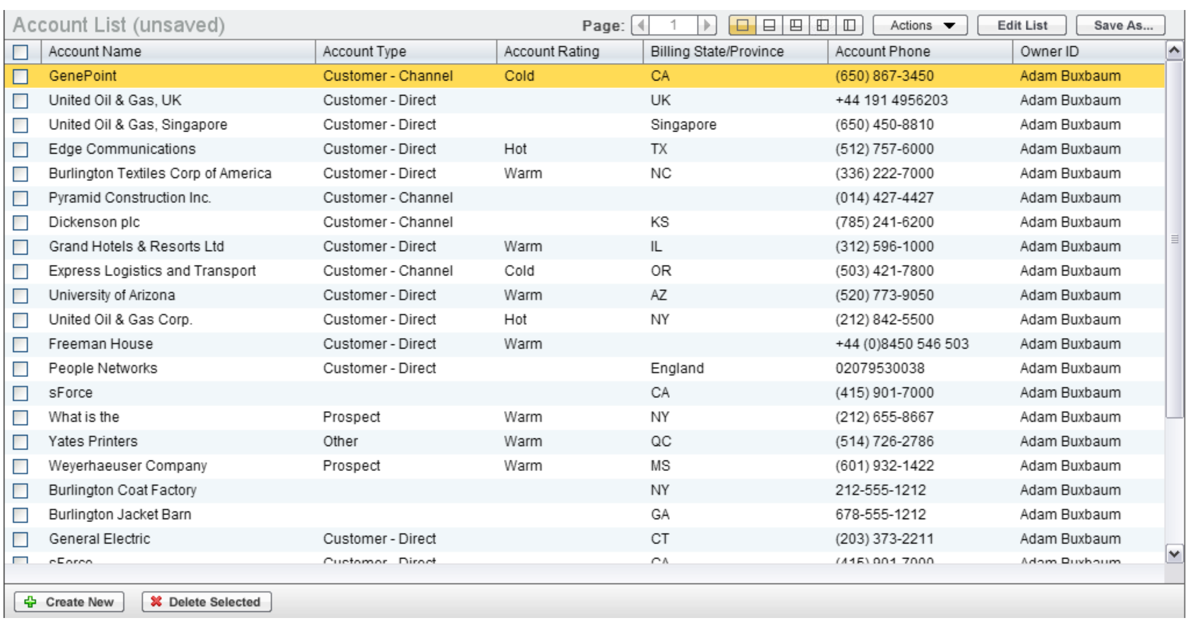


These four Display Views include:

- Results Only
- Results + Related
- Results + Related + Details
- Results + Details

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.



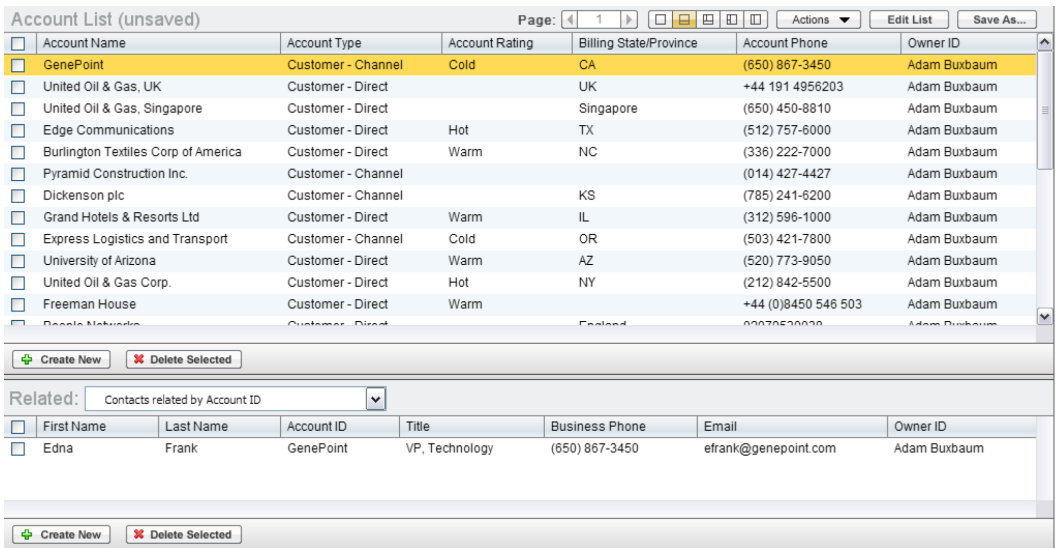
Account List (unsaved) Page: 1 Actions Edit List Save As...

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

Create New Delete Selected

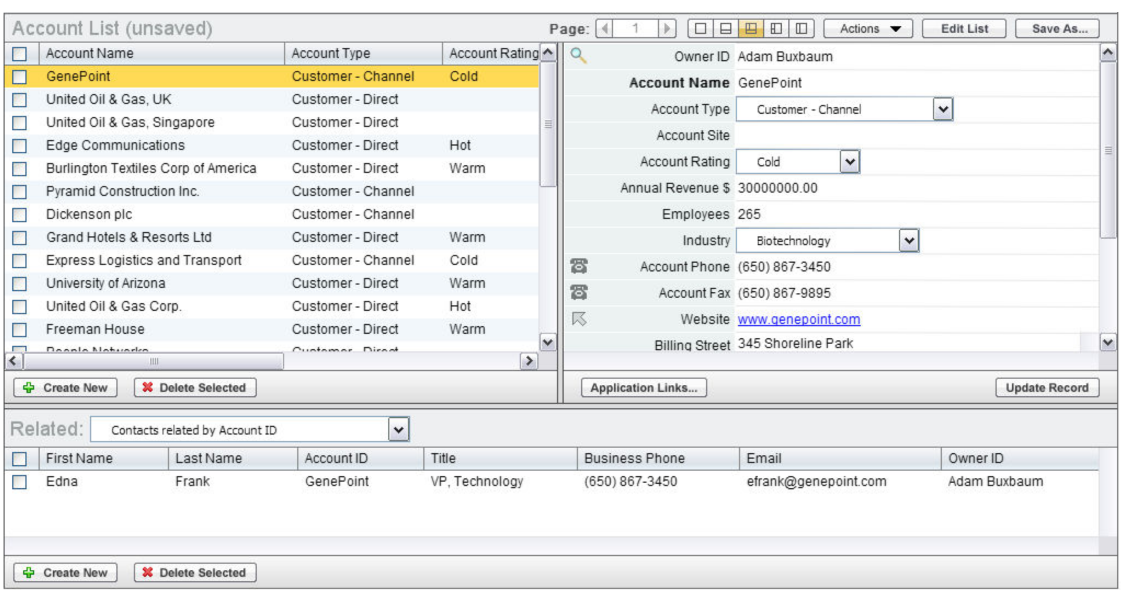
Results + Related

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.)



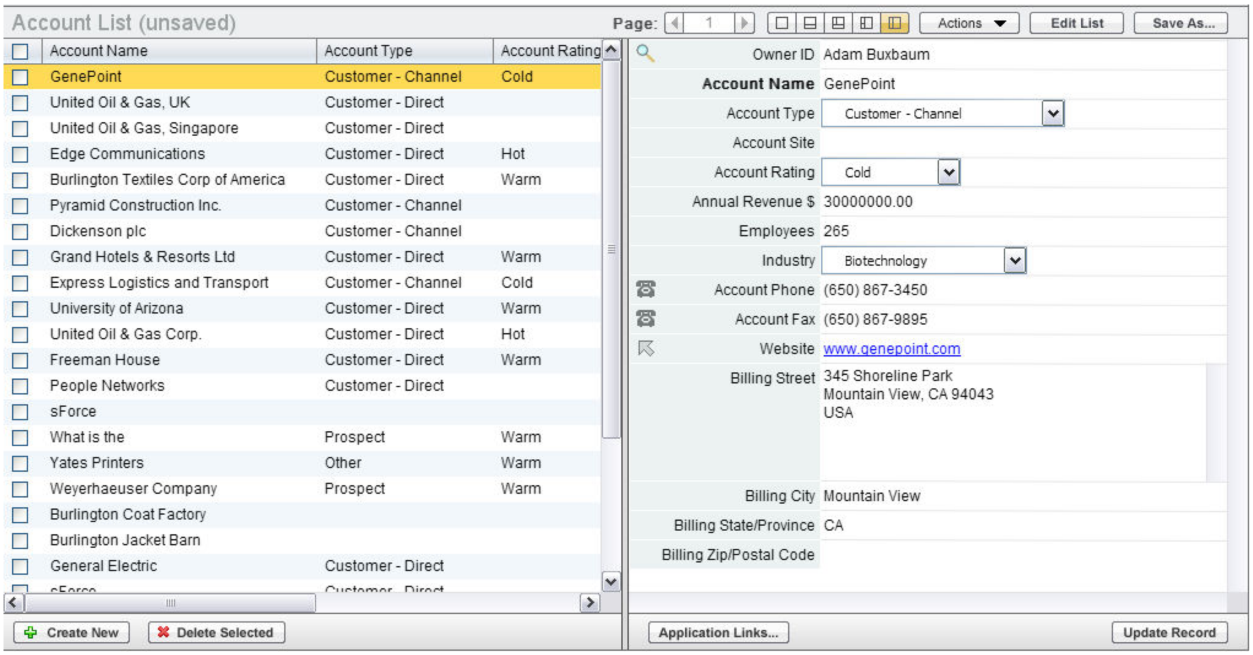
Results + Related + Details

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.



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.



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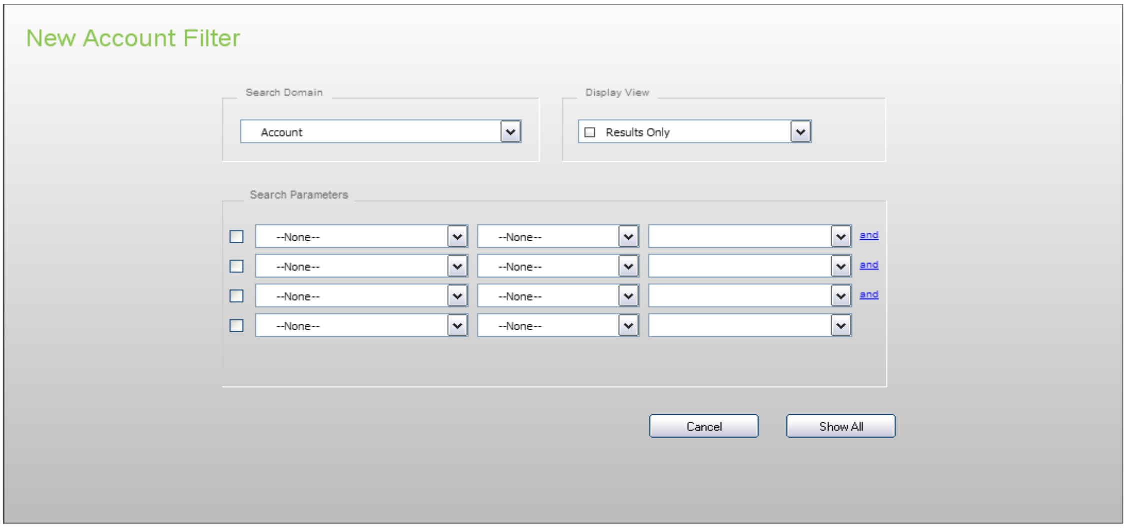
Additional Filtering Functionality

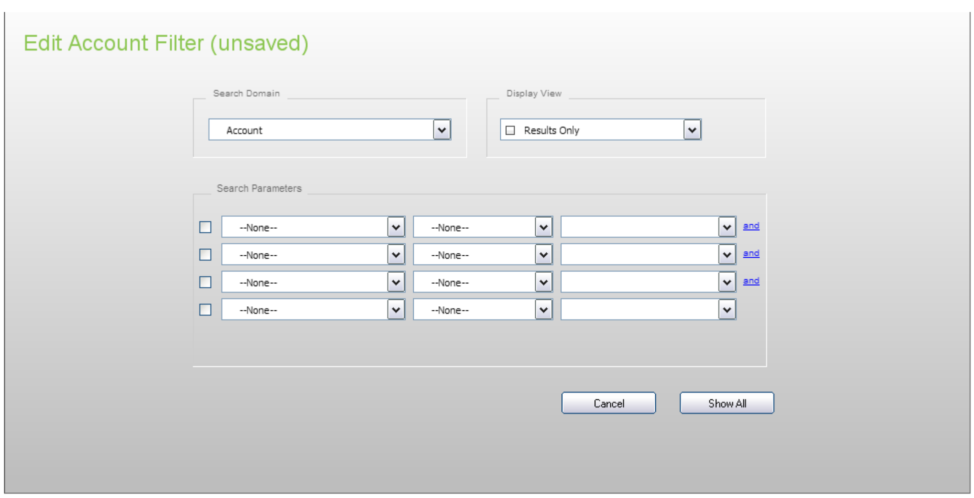
Users have the ability to narrow down their search criteria by allowing the creation of cascading filters in an effort to obtain the desired results. Users can easily create both and /or filters.



Editing Filters

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

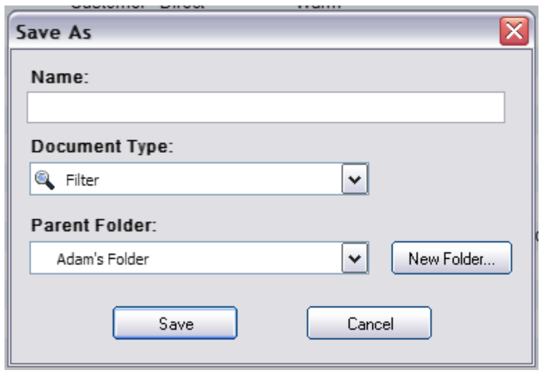
Once selected, the Edit Entity Filter (unsaved) dialog will appear. Here the user can edit the filter.



Saving Filters

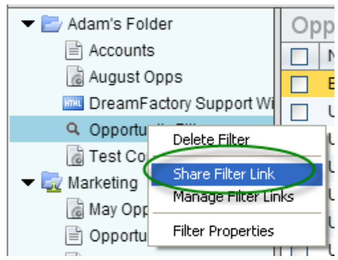
Filters can be easily saved by simply clicking the “Save As” button located at the top of the results box.

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.

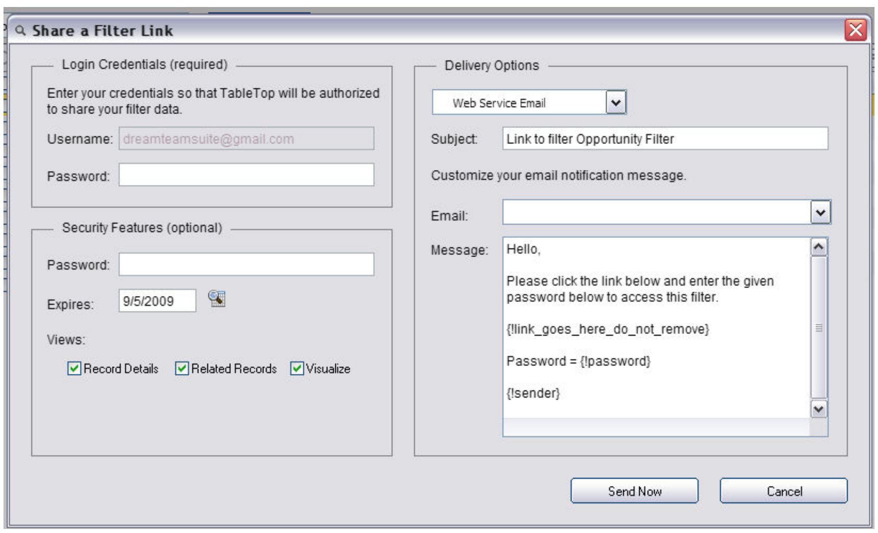


Sharing a Filter

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 you 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 or add the following IP address to the Network Access section under Security Controls in Salesforce Setup 128.121.244.80*)

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

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Creating a List

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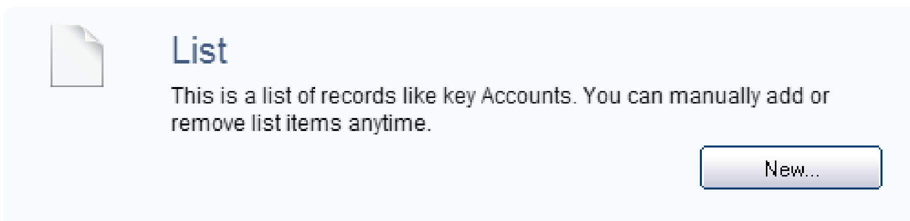
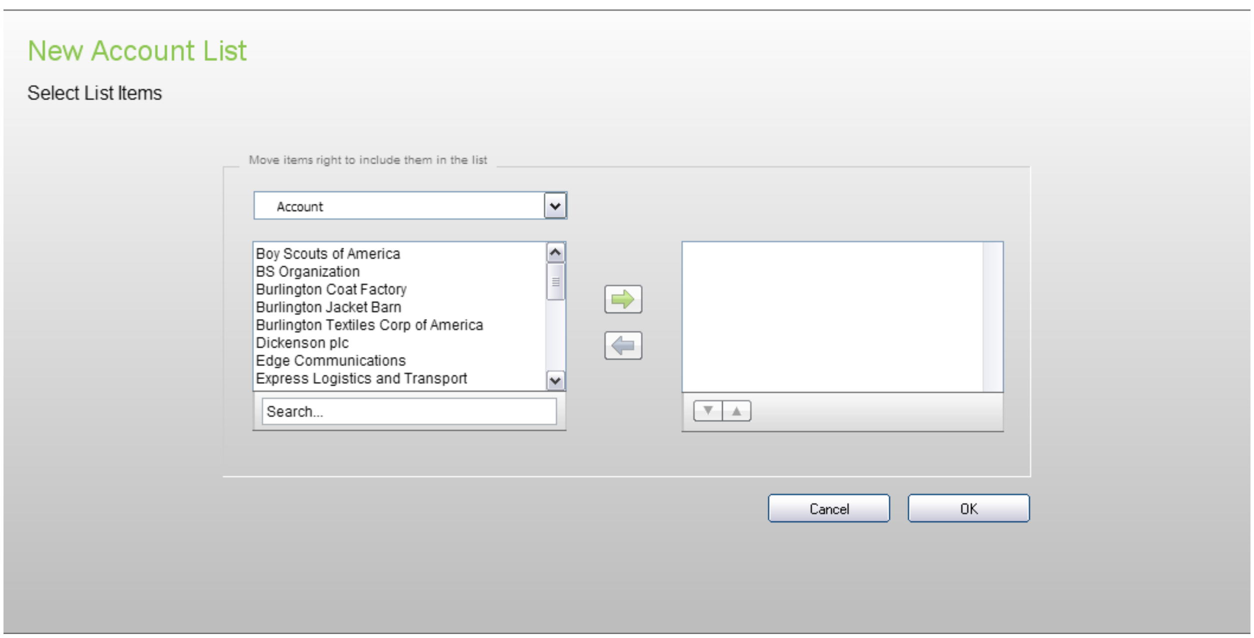


Once selected, the New Entity List dialog box will appear, where the can select the entity they want to create a list of records of. Then the user can choose the desired records, click the green over to move them to the selected box and then click the OK button.

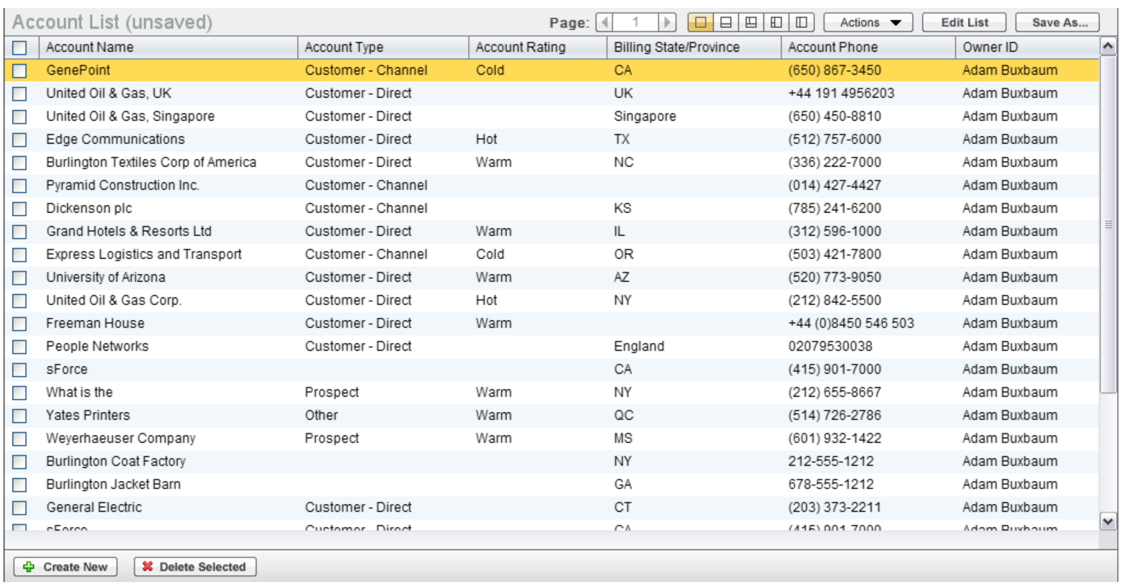


List Record View

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 Name	Account Type	Account Rating	Billing State/Province	Account Phone	Owner ID
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Edge Communications	Customer - Direct	Hot	TX	(512) 757-6000	Adam Buxbaum
Burlington Textiles Corp of America	Customer - Direct	Warm	NC	(336) 222-7000	Adam Buxbaum
Pyramid Construction Inc.	Customer - Channel			(014) 427-4427	Adam Buxbaum
Dickenson plc	Customer - Channel		KS	(785) 241-6200	Adam Buxbaum
Grand Hotels & Resorts Ltd	Customer - Direct	Warm	IL	(312) 596-1000	Adam Buxbaum
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United Oil & Gas Corp.	Customer - Direct	Hot	NY	(212) 842-5500	Adam Buxbaum
Freeman House	Customer - Direct	Warm		+44 (0)8450 546 503	Adam Buxbaum
People Networks	Customer - Direct		England	02079530038	Adam Buxbaum
sForce			CA	(415) 901-7000	Adam Buxbaum
What is the	Prospect	Warm	NY	(212) 655-8667	Adam Buxbaum
Yates Printers	Other	Warm	QC	(514) 726-2786	Adam Buxbaum
Weyerhaeuser Company	Prospect	Warm	MS	(601) 932-1422	Adam Buxbaum
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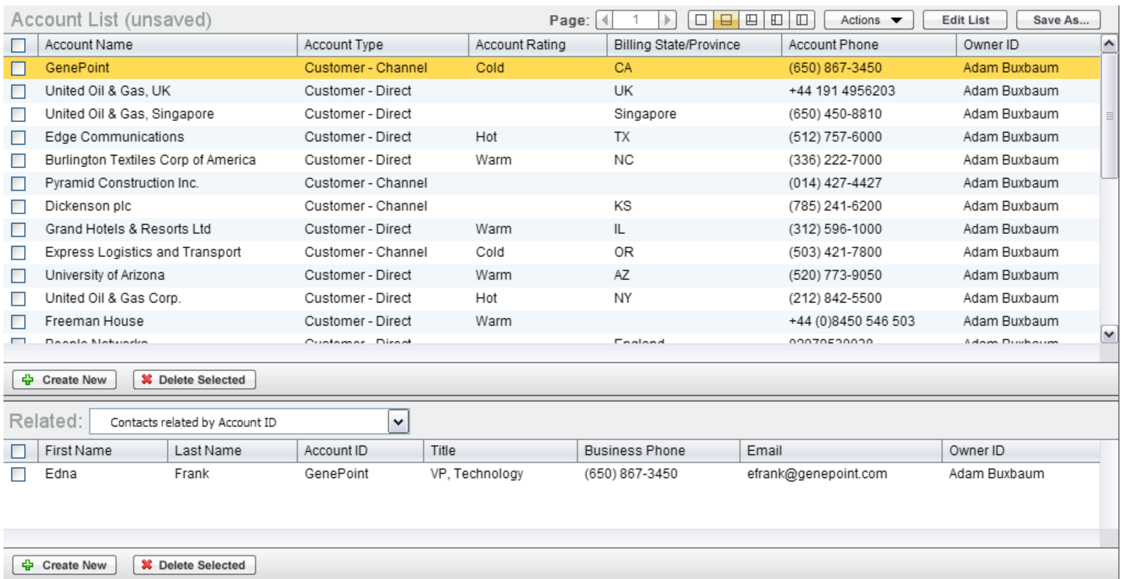
General Electric	Customer - Direct		CT	(203) 373-2211	Adam Buxbaum
sForce	Customer - Direct		CA	(415) 901-7000	Adam Buxbaum

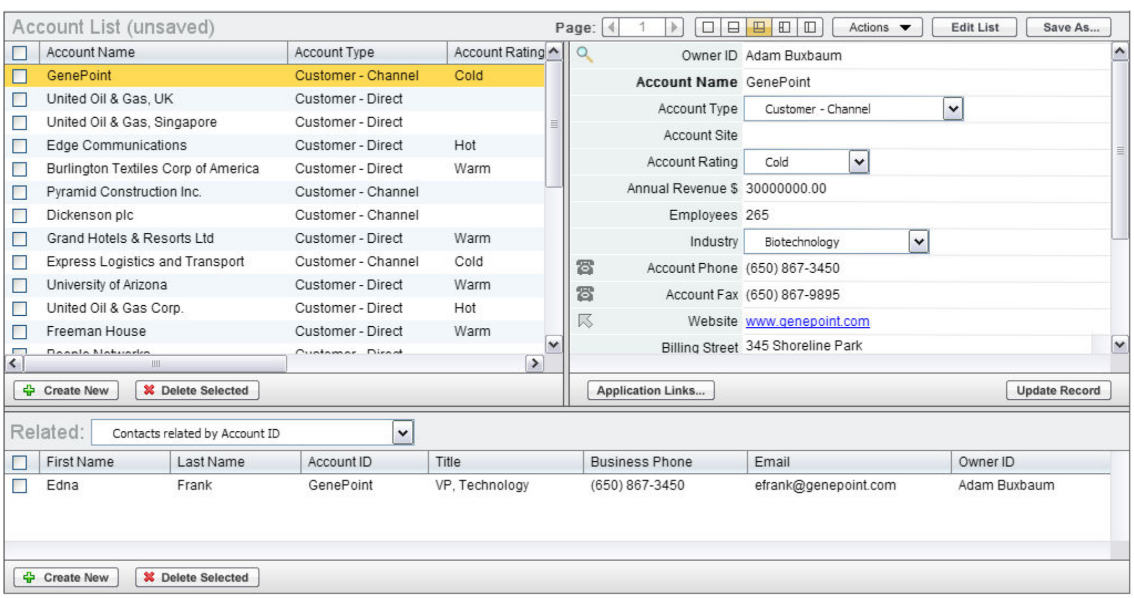
Results + Related

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.



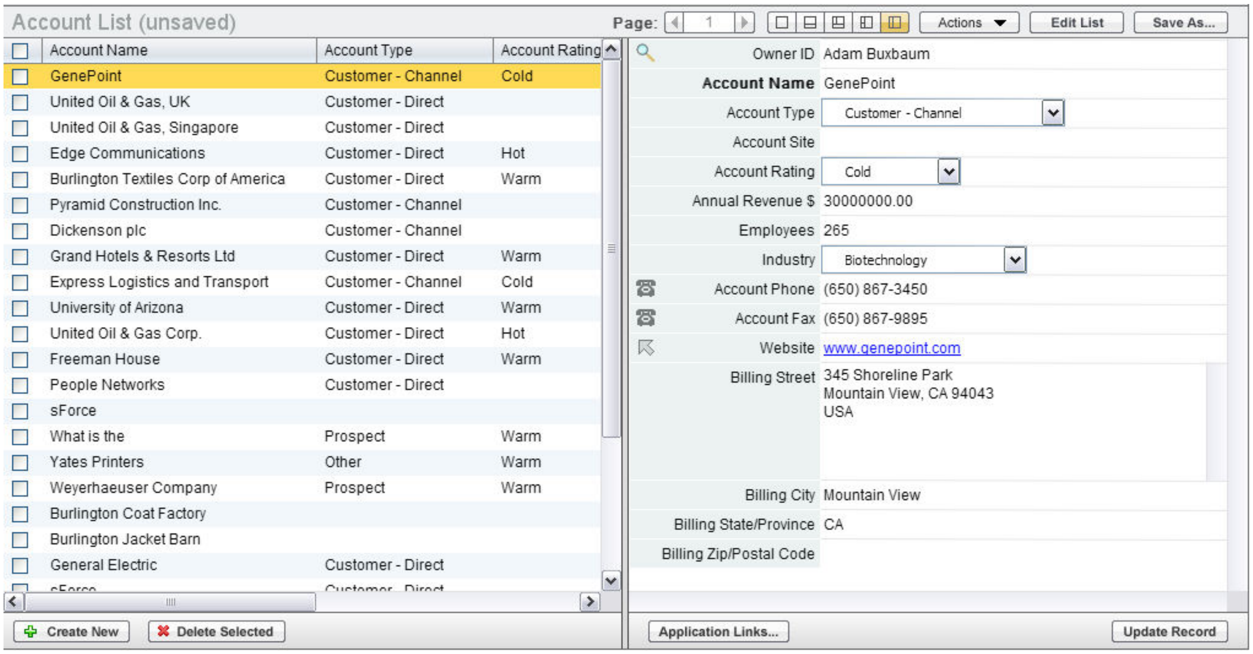
Results + Related + Details

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.



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.

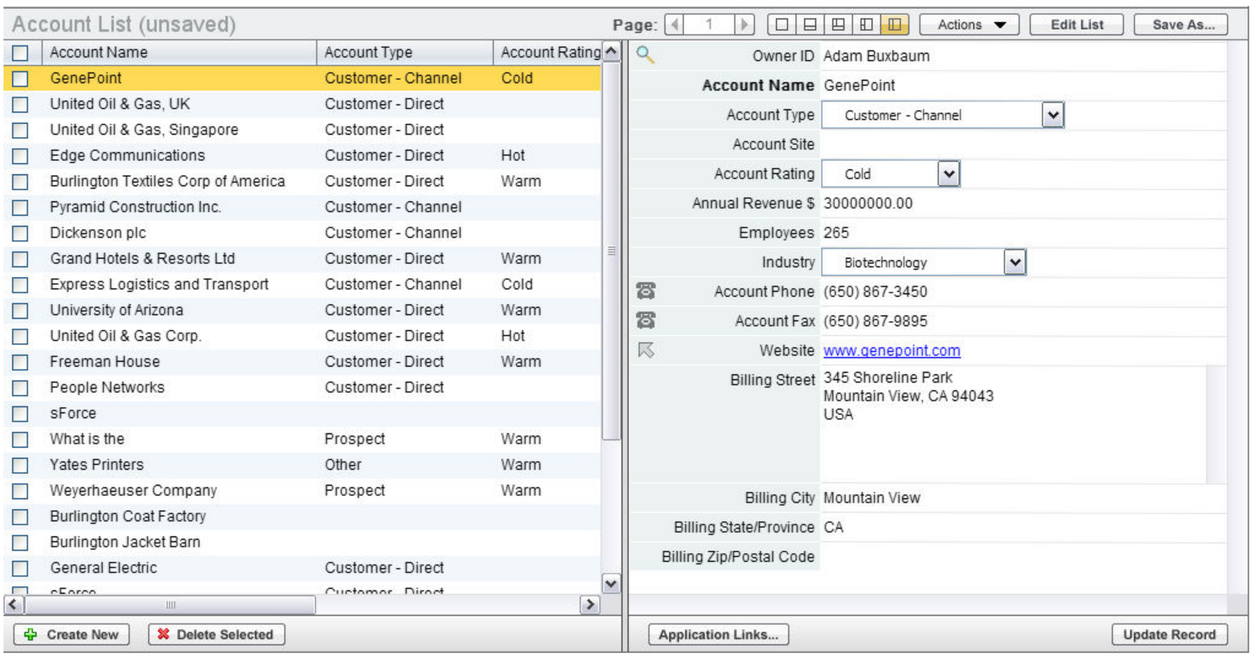


Editing a List

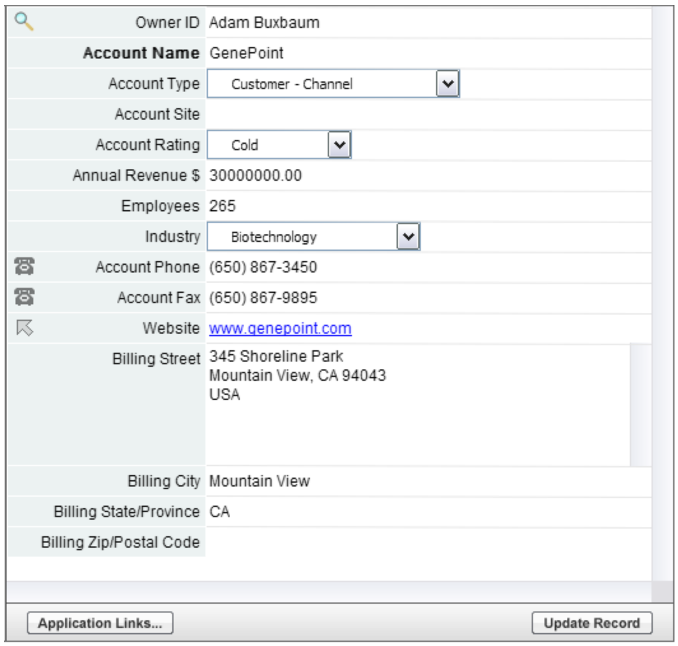
To edit a List of records, the user must simply select the record they want to edit and then select one of the following three Display views:

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

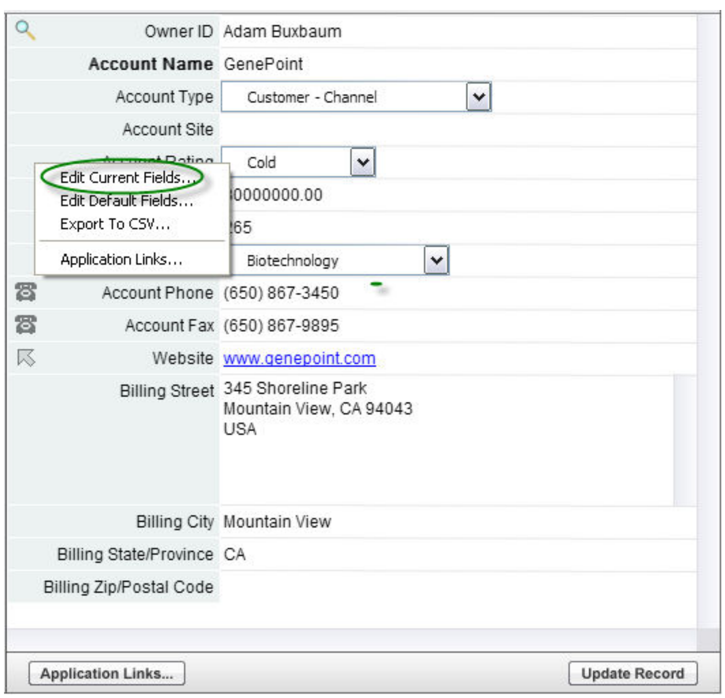
Once selected, the screen will display the records on the left and the details screen on the right.



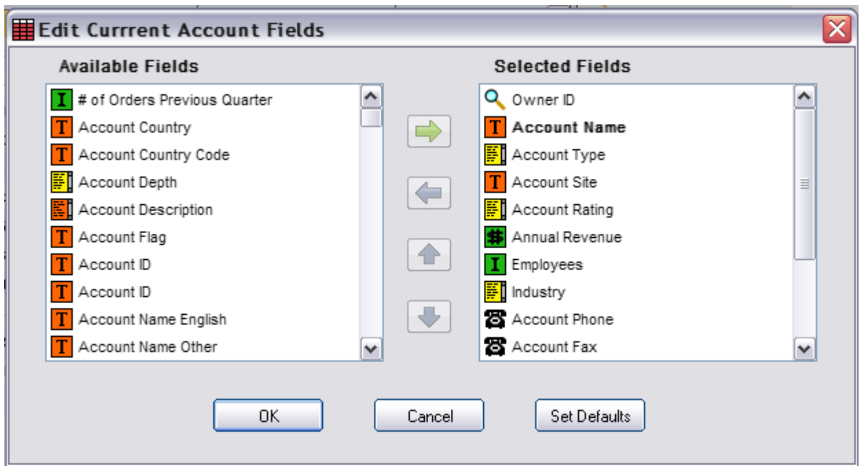
Here users can edit any of the existing directly in the details box. Once all edits have been completed, simply click on the Update Record button in the bottom right and the records will automatically be updated. **Note:** *TableTop is a native application to the SFDC platform. Therefore, if you are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



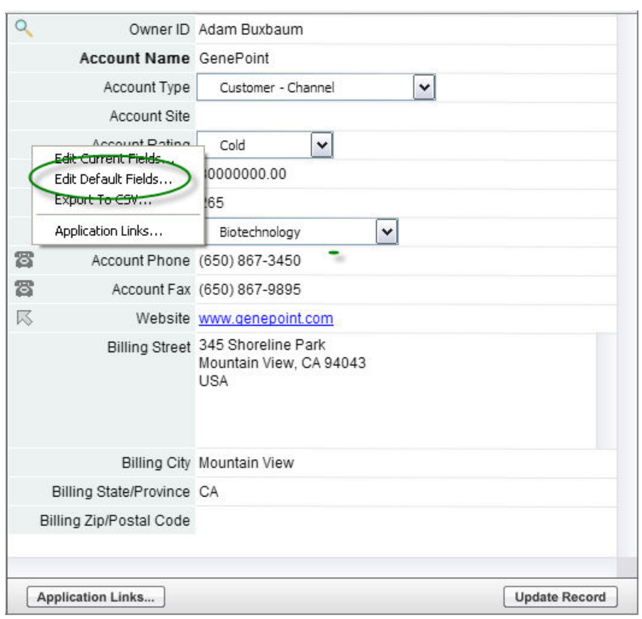
In addition, users can edit existing fields by right clicking on field name and selecting Edit Current Fields.



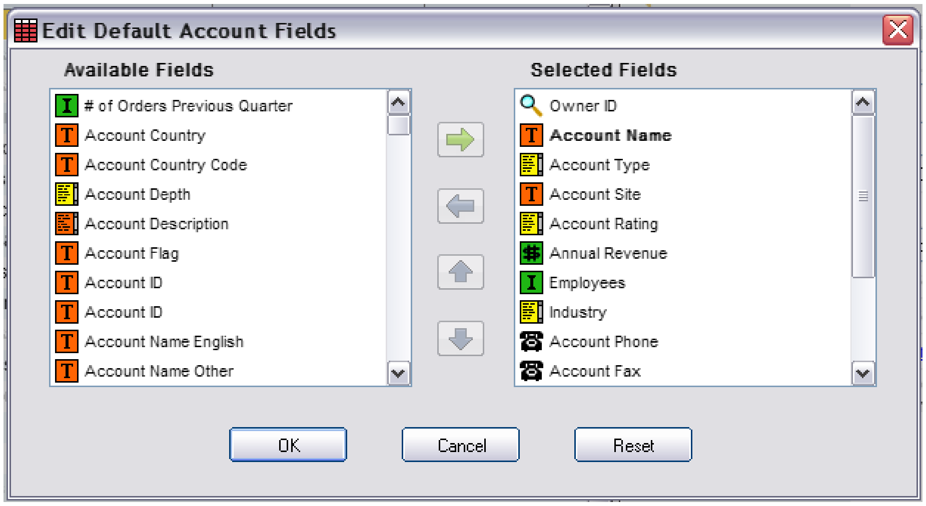
Once selected, the Edit Current Entity Fields dialog will appear, where the user can easily add fields by selecting the field from the Available Fields box and clicking the green arrow and moving it over to the Selected Fields box. Fields can easily be reordered by clicking on the blue up and down arrows.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



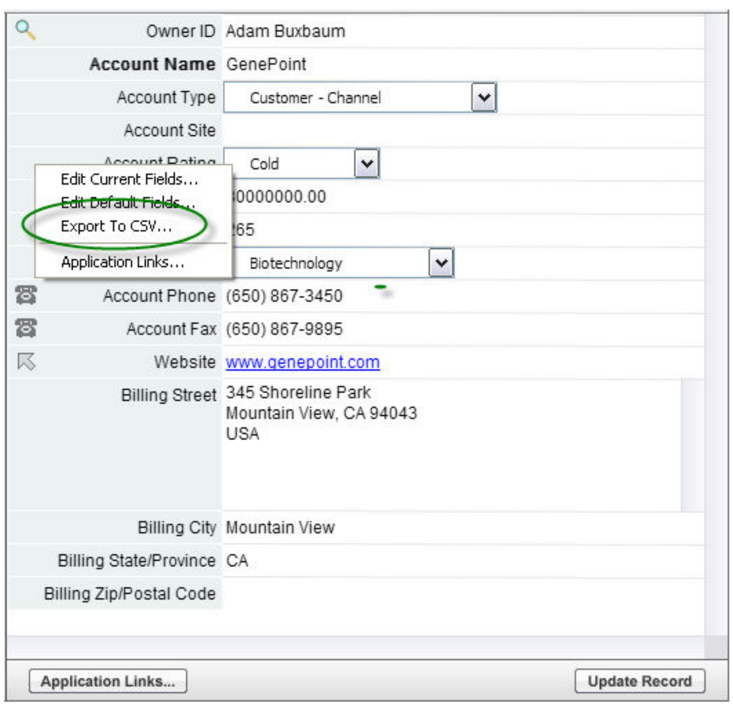
Users can also edit the default entity fields by simply right clicking on the field name and selecting the Edit Default Fields command.



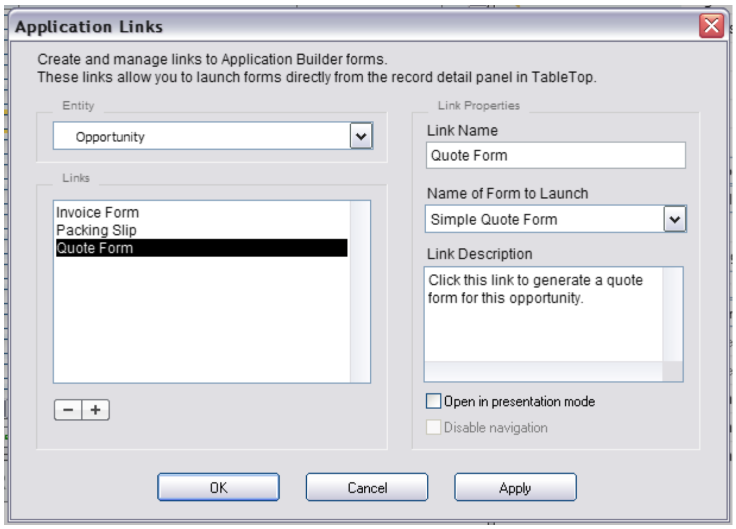
Once selected, the Edit Default Entity Fields dialog will appear where the user can easily add, subtract or reorder fields in the appropriate box.



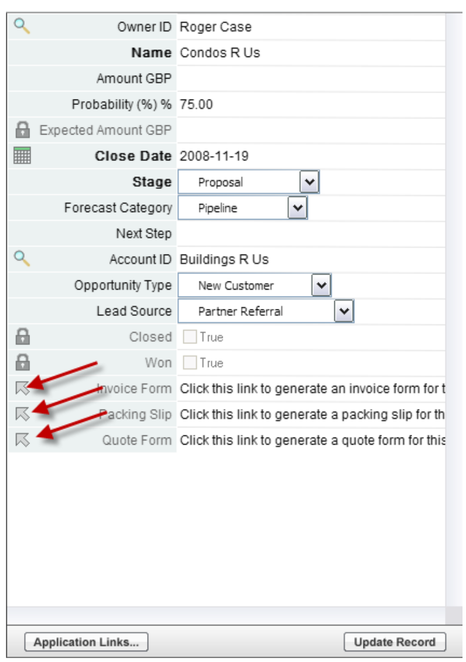
A List of records can easily be exported to a csv file by selecting the Export to CSV command from the right click Menu and saving the file to their desired location.



TableTop also 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.

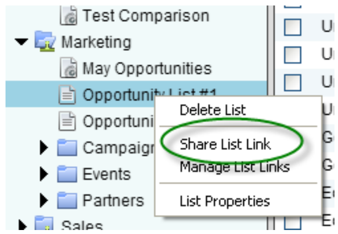


To launch a link, the user must simply click on the arrow next to the link at the bottom of the bottom of the details box. When the link is launched the selected record in the detail view will automatically populate the linked form.

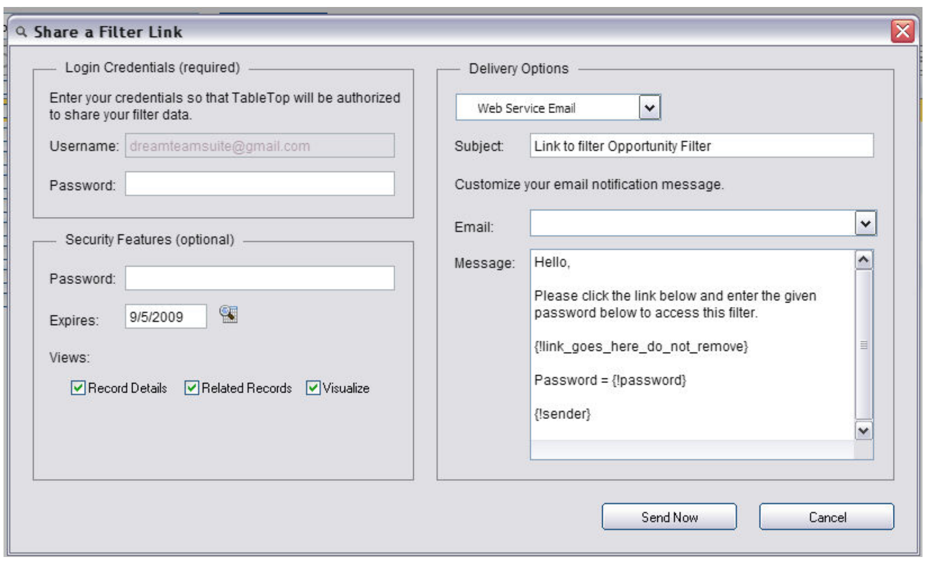


Sharing a List

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 or by adding the following IP address to the Network Access section under Security Controls in Salesforce Setup 128.121.244.80*)

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.

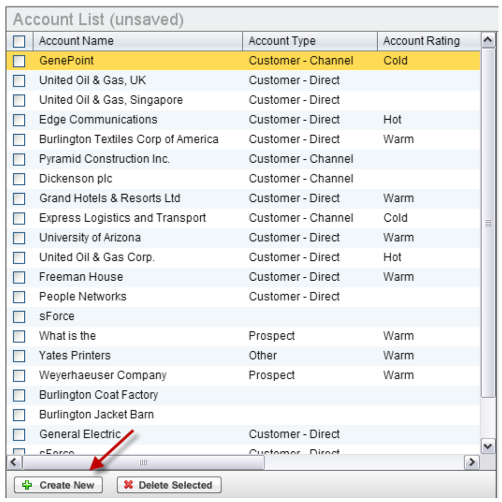
4. Next type the email address or multiple addresses in the assigned box.

5. Lastly, click the send button.

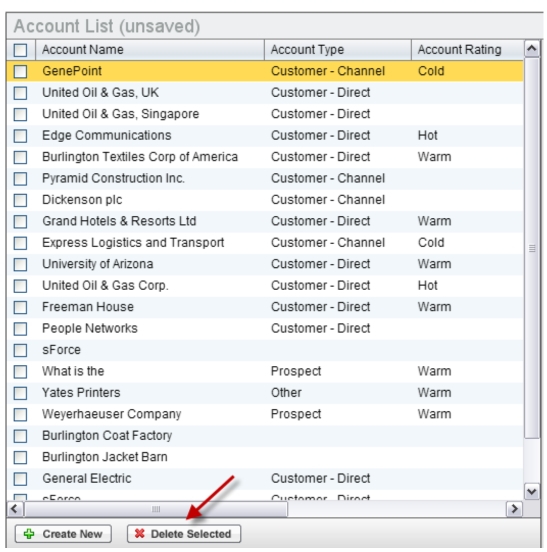
List Short Cuts

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.

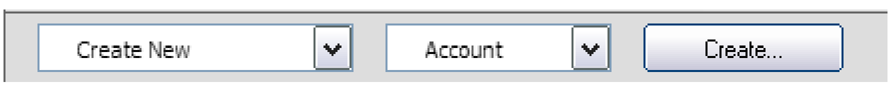


In the top left corner of the screen there is two drop down menus with four shortcut options including:

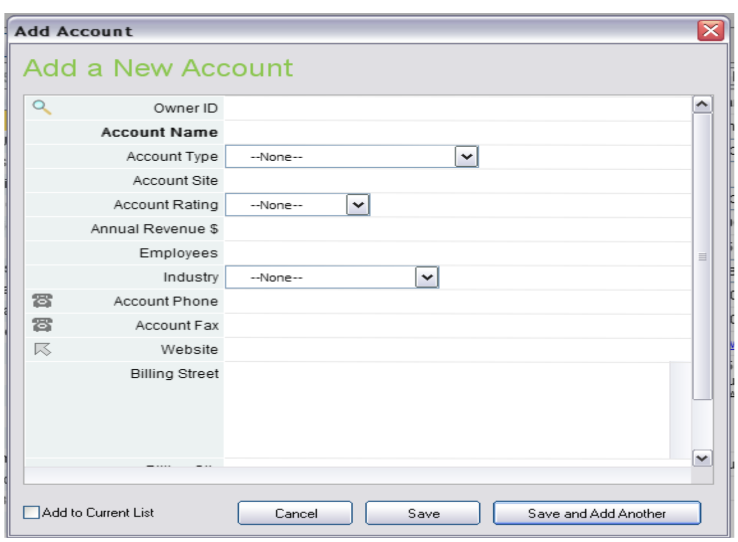
The first short cut enables users to display a list of all records for the desired entity. All the user must do is select Show All from the first drop down menu, and select the Entity from the second drop down menu and then finally click the Show All Now button and the list of records will be created.

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.

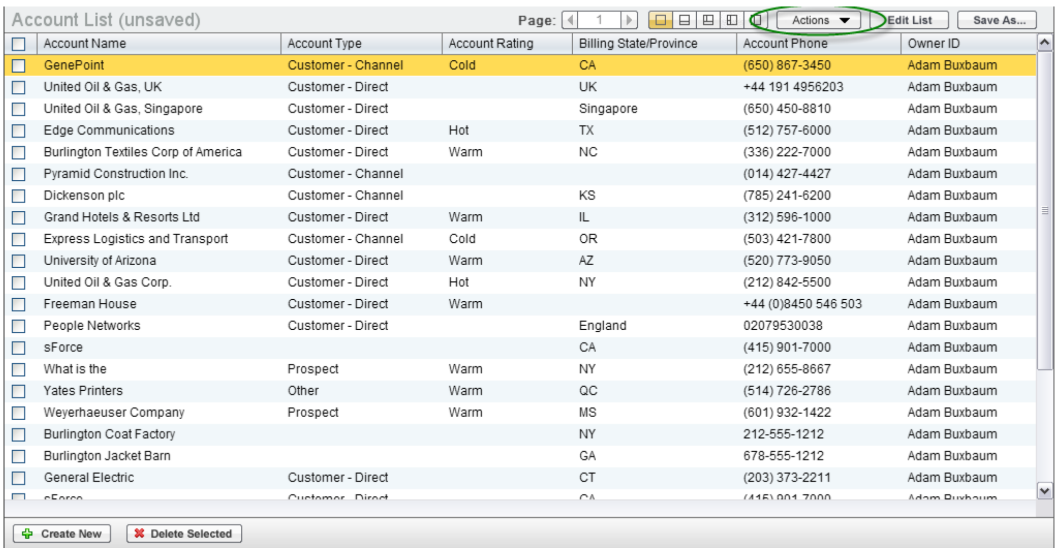


Reporting

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.

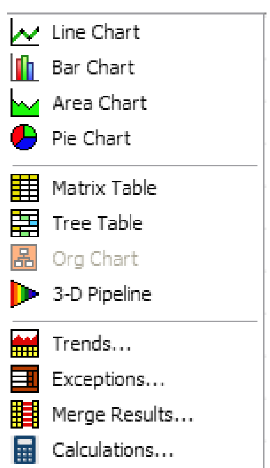
Creating a Report or Dashboard

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 Actions Menu on the right side of the screen and select the desired report or dashboard option.



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

The Actions Menu provides the following reporting and dashboard options:

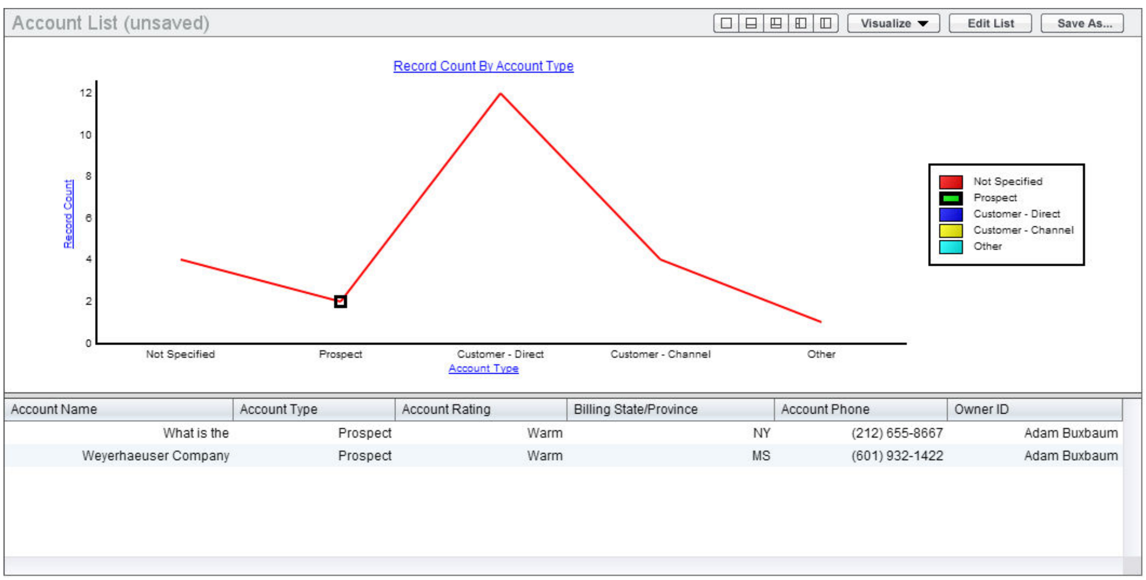


Report and Dashboard Options

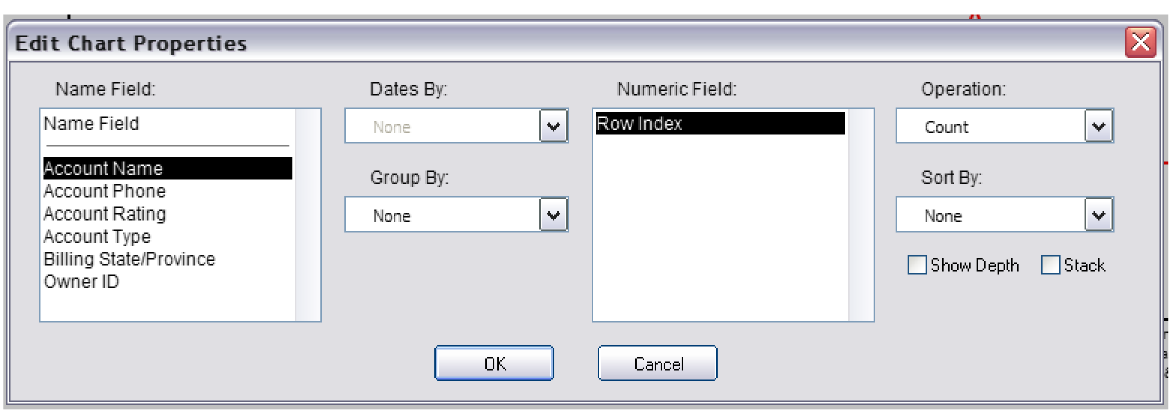
This section highlights the multiple reports and dashboards that can be created using TableTop. Each report and dashboard is discussed in detail below.

Line Chart

The Line Chart enables users to 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. The Line Chart is part of the Free version of TableTop.

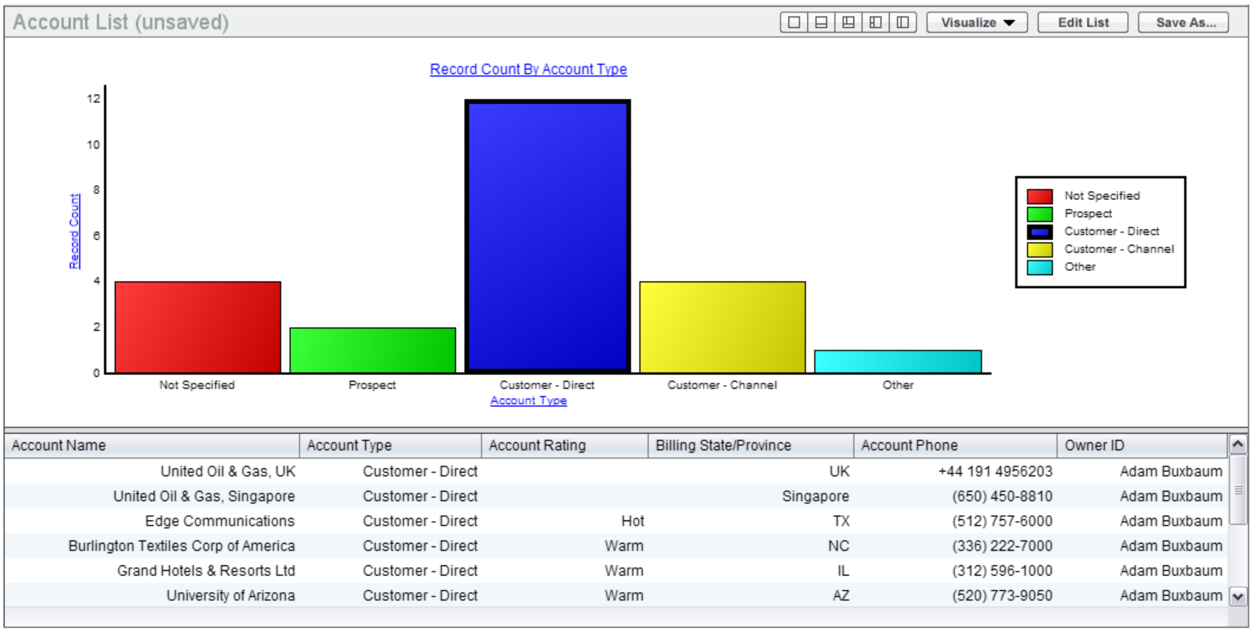


Users can easily edit the properties of the X and Y axis or both by simply clicking on the appropriate hyper link and selecting the desired criteria. The dialog below displays the options available for display.

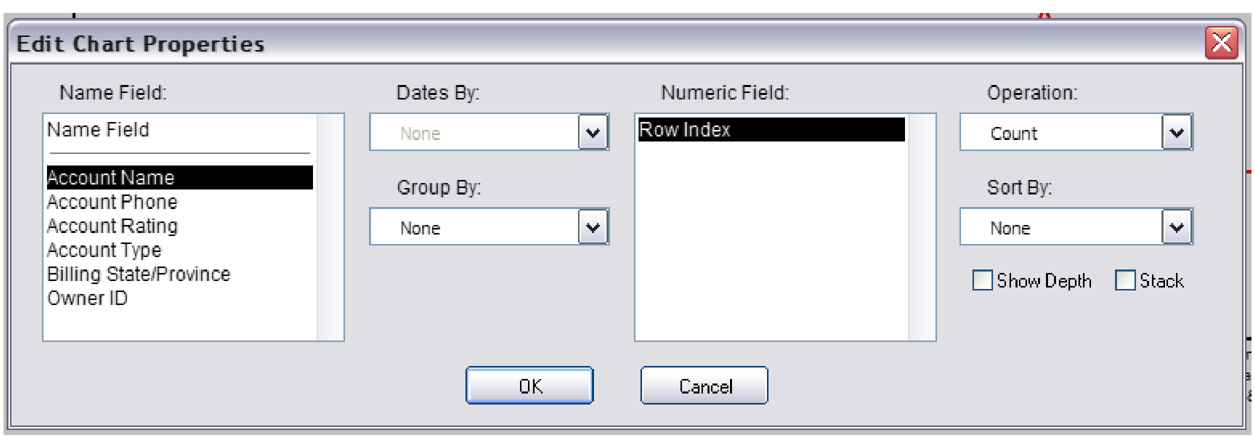


Bar Chart

The Bar Chart enables users to 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. The Line Chart is part of the Free version of TableTop.

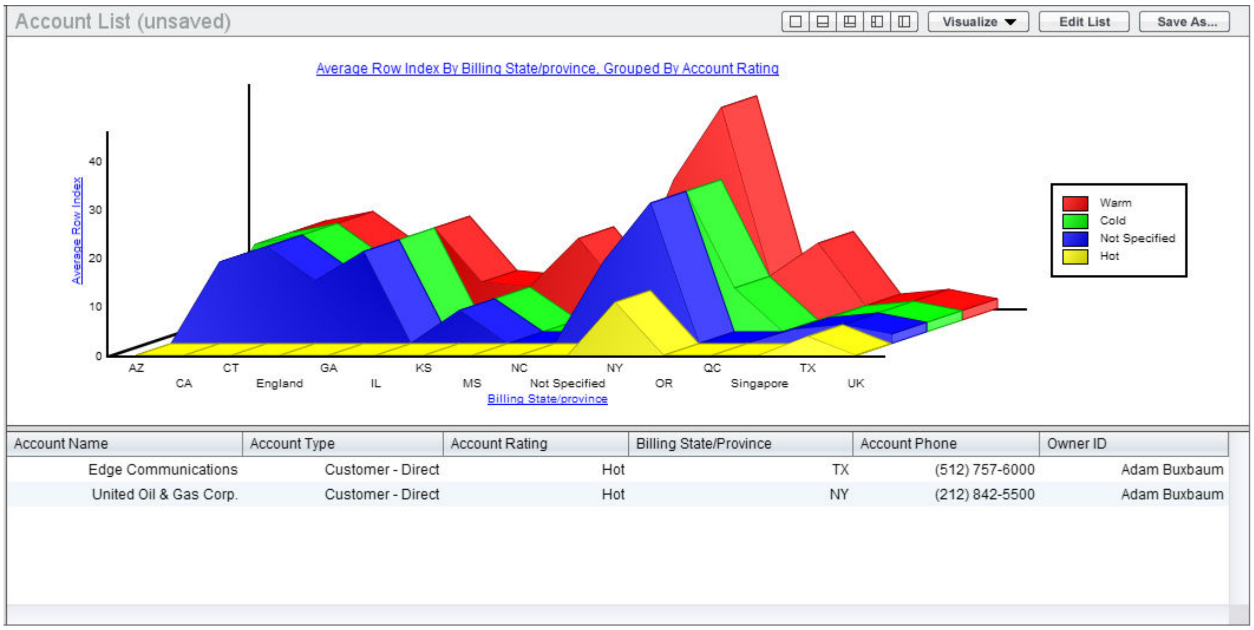


Similar to a Line Chart, users can easily edit the properties of the X and Y axis or both by simply clicking on the appropriate hyper link and selecting the desired criteria. The dialog below displays the options available for display.

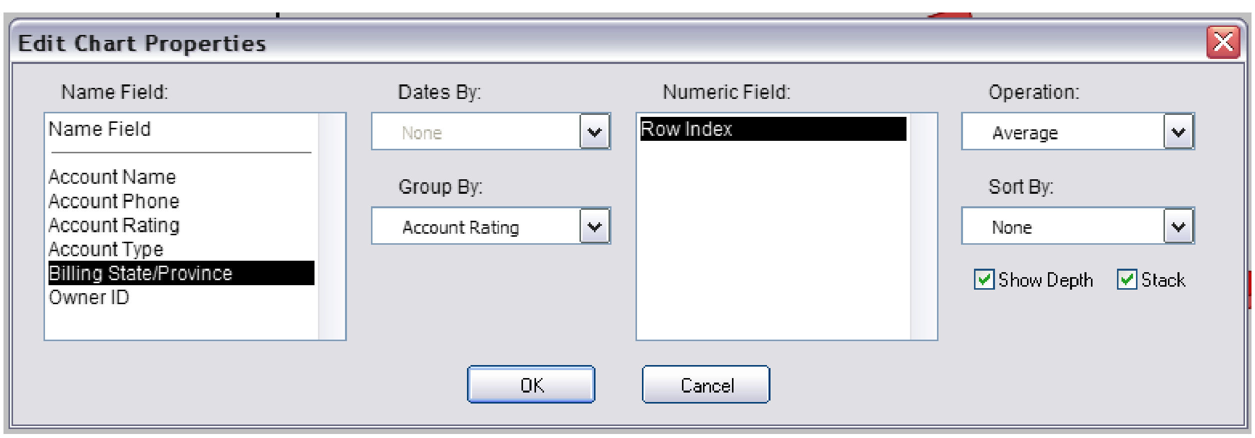


Area Chart

The Area Chart enables users to 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. The Line Chart is part of the Free version of TableTop.

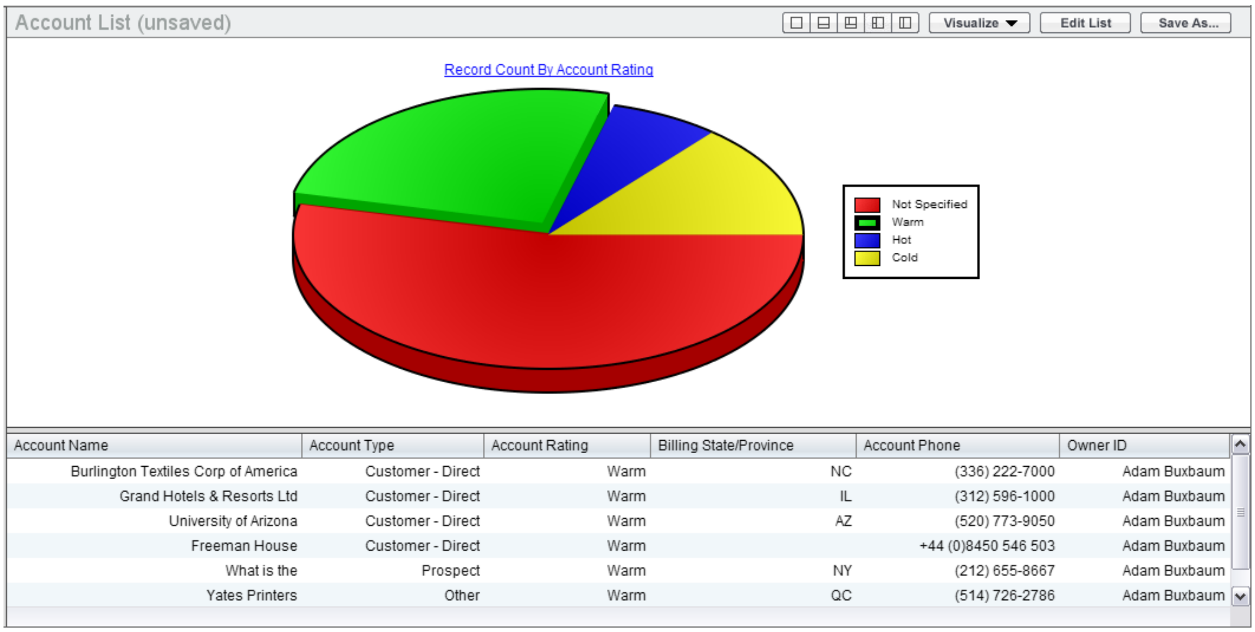


Similar to a Line Chart and the Bar Chart, users can easily edit the properties of the X and Y axis or both by simply clicking on the appropriate hyper link and selecting the desired criteria. The dialog below displays the options available for display.

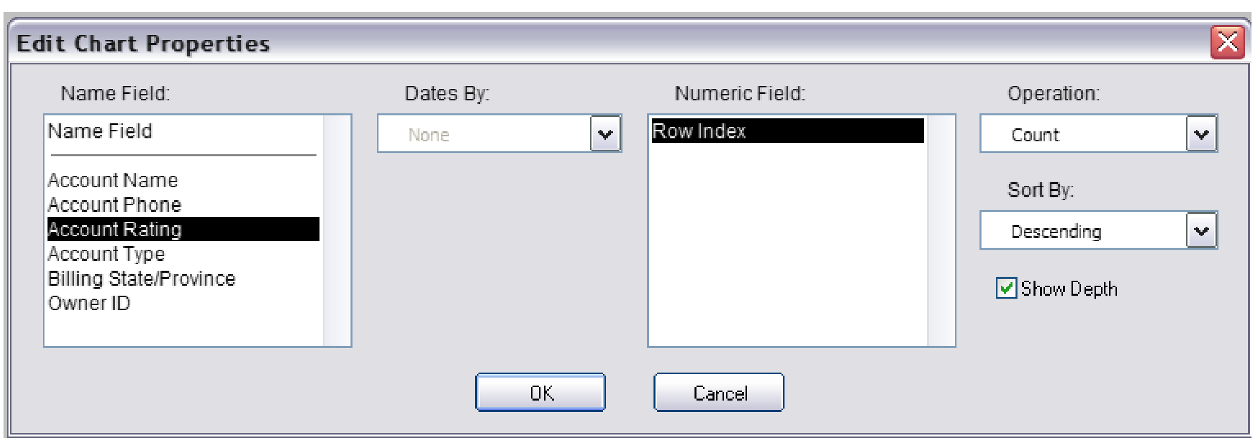


Pie Chart

The Pie Chart enables users to 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*. The Line Chart is part of the Free version of TableTop.

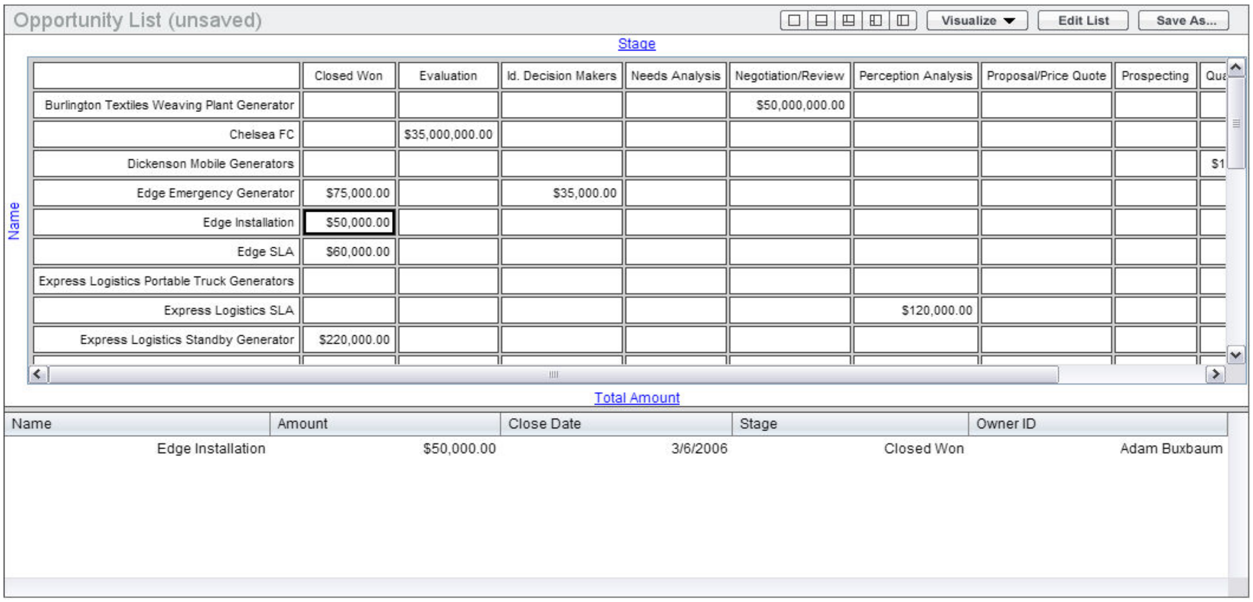


Users can easily edit the properties of the Pie Chart by simply clicking on the appropriate hyper link and selecting the desired criteria. The dialog below displays the options available for display.

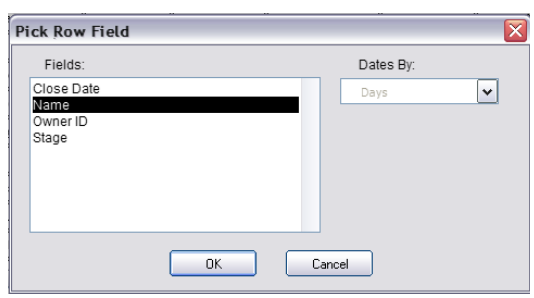


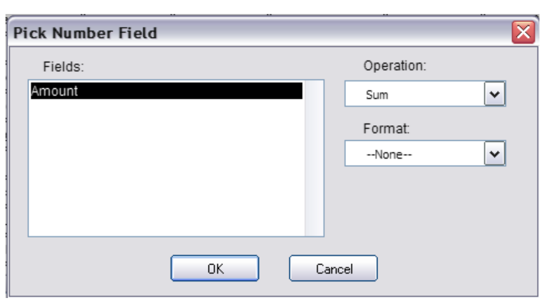
Matrix Table

The Matrix Table enables users to 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. The Line Chart is part of the Professional version of TableTop.



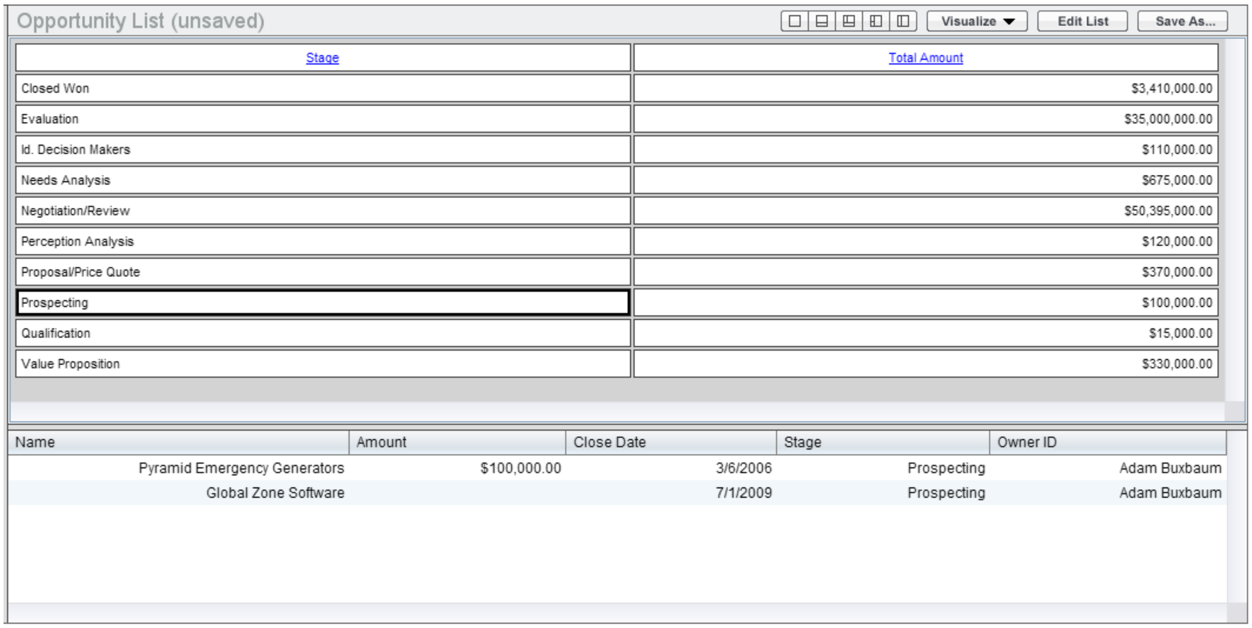
Users can easily edit the properties of the Matrix Table by simply clicking on the hyperlink at the top of the screen to select the Column Fields, the hyperlink on the left to select the Row fields and the hyperlink on the bottom to select the Number fields.



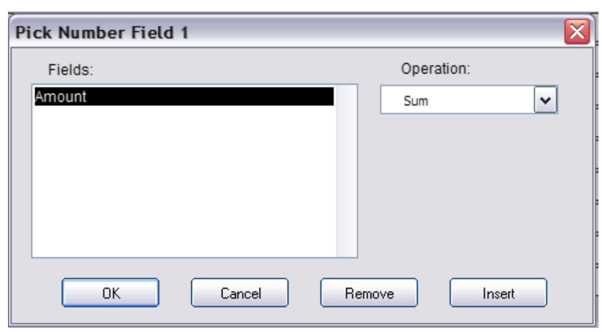


Tree Table

The Tree Table enables users to 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.

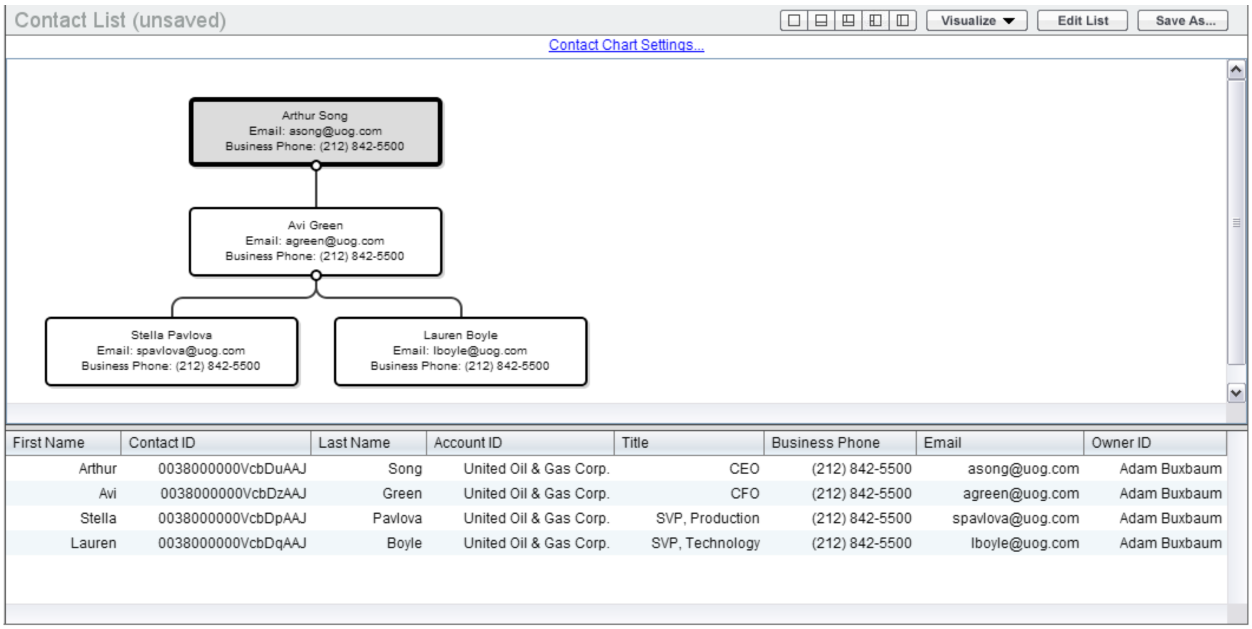


Users can easily edit the properties of the Tree Table by simply clicking on the first hyperlink at the top of the screen to select the Name Field and then on the second hyperlink at the top of the screen to select the Number field.

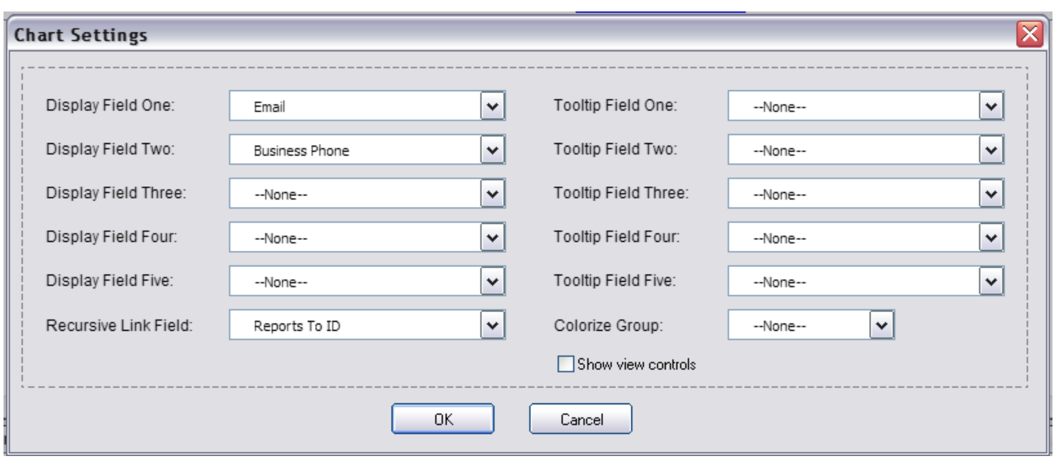


Org Chart

The Org Chart enables users to 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.



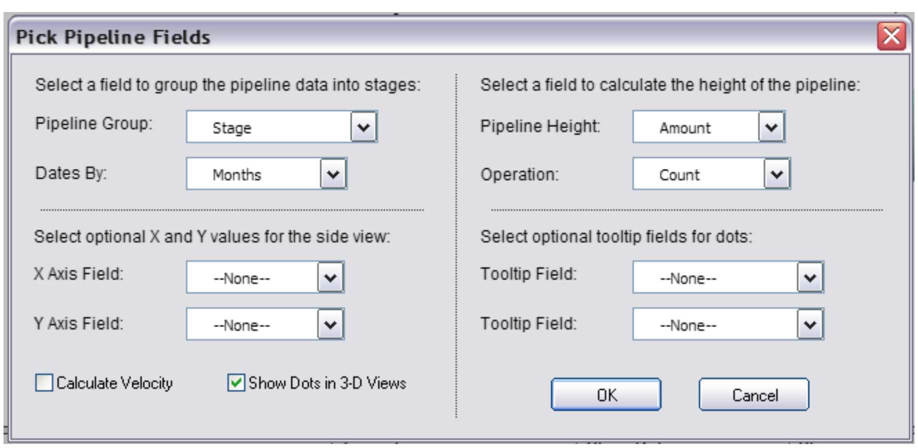
Users can easily edit the properties of the Org Chart by simply clicking on the Account/Contact Chart Settings hyperlink at the top of the screen. Here users can select information they want to display from a number of fields.



3-D Sales Pipeline

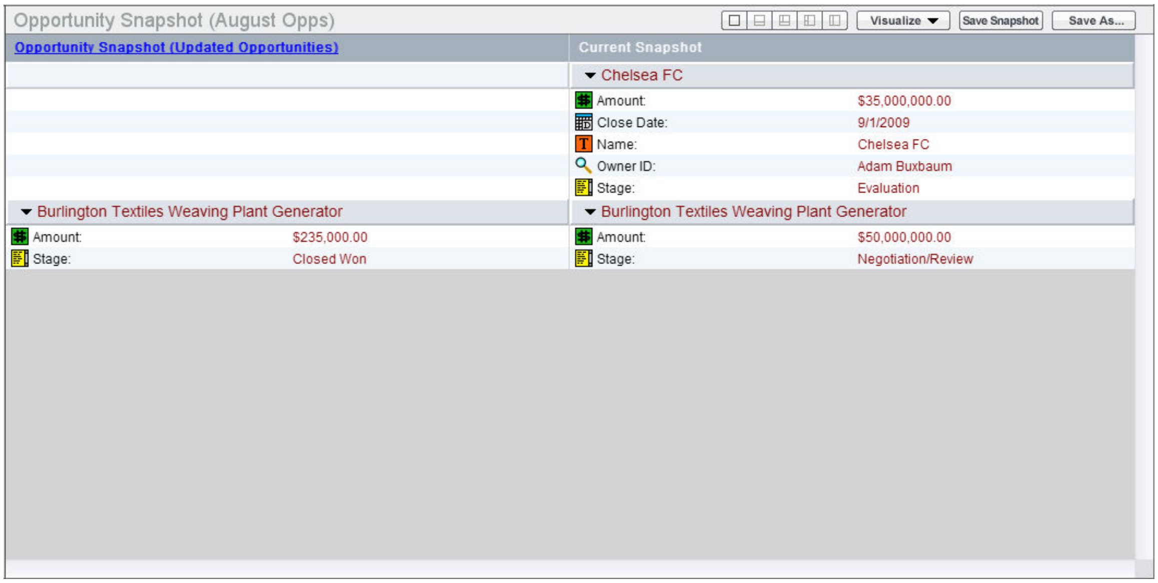
The 3-D Pipeline enables users to easily create a 3-D Pipeline report to visualize opportunities as a sales funnel showing both pipeline shape and velocity in highly interactive three dimensional views.   Rotate the pipeline in real-time and click on any of the opportunities in the view for drill down. 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.



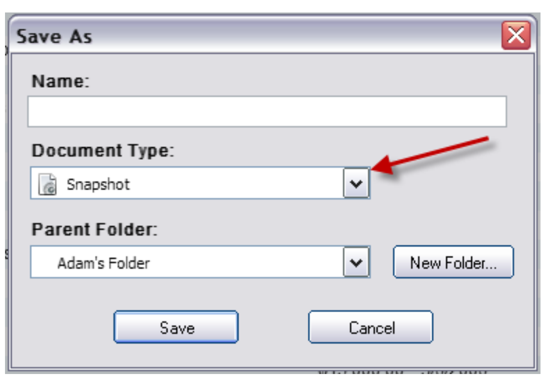
Trend Comparison

The Trend Comparison enables users to 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.



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.

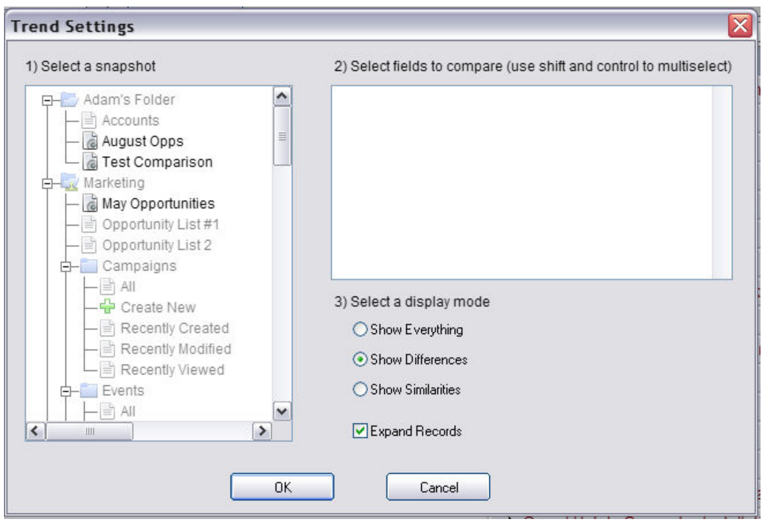


5. Display all Opportunities again
6. Click on the Visualize Menu and select Trend Comparison

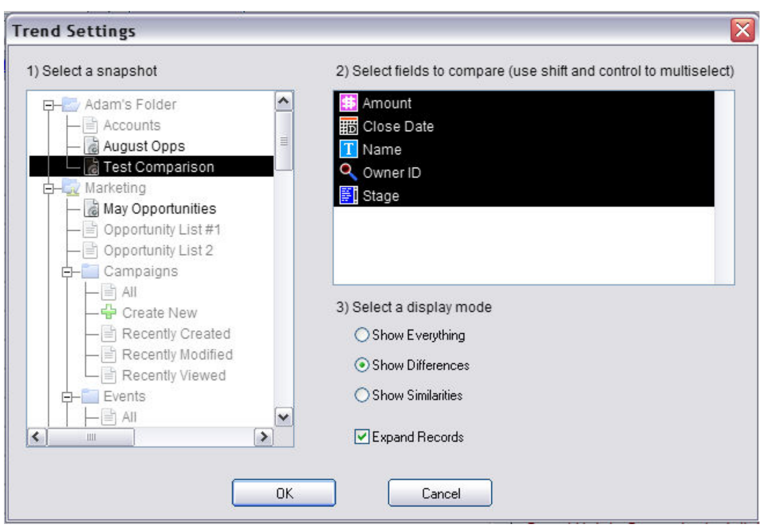
7. The Trend Settings dialog box will appear. Here users can select the Snapshot they want to compare and then select to display one of the follow three options:

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.

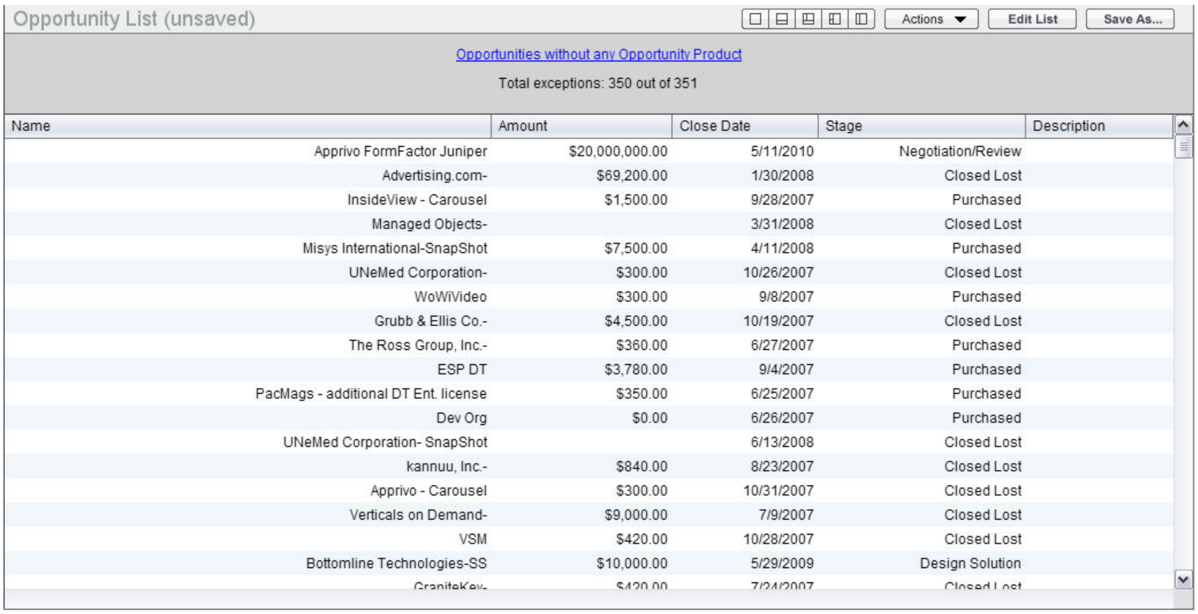


9. Once the user clicks the OK button, the comparison will appear displaying all differences in red.


Opportunity List (unsaved)
Visualize
Edit List
Save As...
Opportunity Snapshot (May Opportunities)
Current List
Test opportunity
Amount: $50,000.00
Close Date: 8/31/2009
Name: Test opportunity
Owner ID: Adam Buxbaum
Stage: Identified
Chelsea FC
Amount: $35,000,000.00
Close Date: 9/1/2009
Name: Chelsea FC
Owner ID: Adam Buxbaum
Stage: Evaluation
Burlington Textiles Weaving Plant Generator
Amount: $235,000.00
Stage: Closed Won
Burlington Textiles Weaving Plant Generator
Amount: $50,000,000.00
Stage: Negotiation/Review

Exception Report

The Exception Report allows users to find exceptions in current related records (ex: Accounts without Contacts) and then display the results in a table.


Opportunity List (unsaved)

Actions | Edit List | Save As...

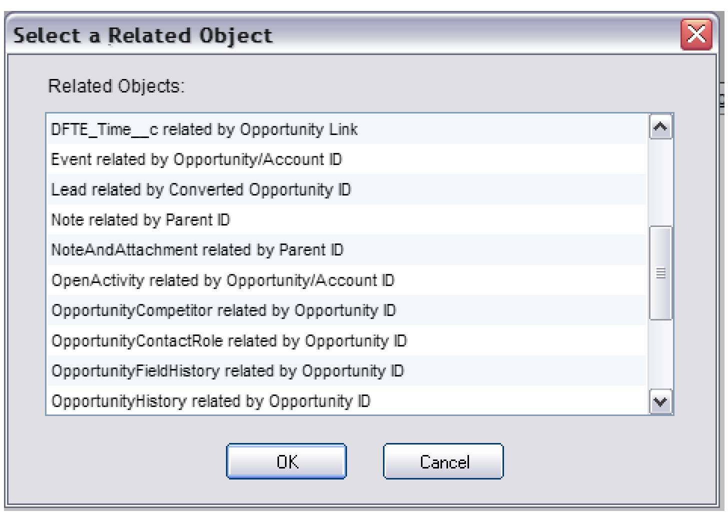
Opportunities without any Opportunity Product

Total exceptions: 350 out of 351

Name	Amount	Close Date	Stage	Description
Apprivo FormFactor Juniper	$20,000,000.00	5/11/2010	Negotiation/Review	
Advertising.com-	$69,200.00	1/30/2008	Closed Lost	
InsideView - Carousel	$1,500.00	9/28/2007	Purchased	
Managed Objects-		3/31/2008	Closed Lost	
Misys International-SnapShot	$7,500.00	4/11/2008	Purchased	
UNeMed Corporation-	$300.00	10/26/2007	Closed Lost	
WoWiVideo	$300.00	9/8/2007	Purchased	
Grubb & Ellis Co.-	$4,500.00	10/19/2007	Closed Lost	
The Ross Group, Inc.-	$360.00	6/27/2007	Purchased	
ESP DT	$3,780.00	9/4/2007	Purchased	
PacMags - additional DT Ent. license	$350.00	6/25/2007	Purchased	
Dev Org	$0.00	6/26/2007	Purchased	
UNeMed Corporation- SnapShot		6/13/2008	Closed Lost	
kannuu, Inc.-	$840.00	8/23/2007	Closed Lost	
Apprivo - Carousel	$300.00	10/31/2007	Closed Lost	
Verticals on Demand-	$9,000.00	7/9/2007	Closed Lost	
VSM	$420.00	10/28/2007	Closed Lost	
Bottomline Technologies-SS	$10,000.00	5/29/2009	Design Solution	
GraniteKey-	$420.00	7/24/2007	Closed Lost	

To run the Exception report the user must:

1. Create a List or a Snapshot of object records
2. Select Exceptions from the Actions Menu
3. Once selected, the user will be prompted to select a related object



4. Once the related object has been selected, TableTop will then process the information and generate the exceptions report

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

Opportunities without any Opportunity Product

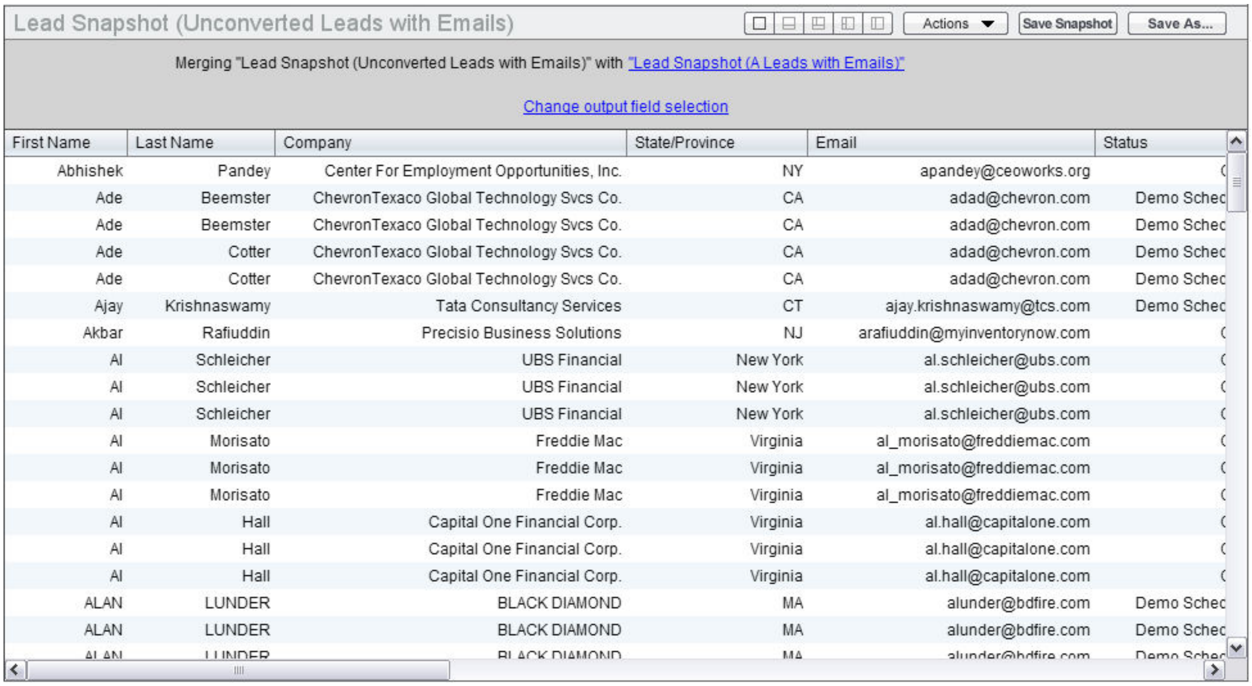
Total exceptions: 350 out of 351

Name	Amount	Close Date	Stage	Description
Apprivo FormFactor Juniper	$20,000,000.00	5/11/2010	Negotiation/Review	
Advertising.com-	$69,200.00	1/30/2008	Closed Lost	
InsideView - Carousel	$1,500.00	9/28/2007	Purchased	
Managed Objects-		3/31/2008	Closed Lost	
Misys International-SnapShot	$7,500.00	4/11/2008	Purchased	
UNeMed Corporation-	$300.00	10/26/2007	Closed Lost	
WoWiVideo	$300.00	9/8/2007	Purchased	
Grubb & Ellis Co.-	$4,500.00	10/19/2007	Closed Lost	
The Ross Group, Inc.-	$360.00	6/27/2007	Purchased	
ESP DT	$3,780.00	9/4/2007	Purchased	
PacMags - additional DT Ent. license	$350.00	6/25/2007	Purchased	
Dev Org	$0.00	6/26/2007	Purchased	
UNeMed Corporation- SnapShot		6/13/2008	Closed Lost	
kannuu, Inc.-	$840.00	8/23/2007	Closed Lost	
Apprivo - Carousel	$300.00	10/31/2007	Closed Lost	
Verticals on Demand-	$9,000.00	7/9/2007	Closed Lost	
VSM	$420.00	10/28/2007	Closed Lost	
Bottomline Technologies-SS	$10,000.00	5/29/2009	Design Solution	
GraniteKey-	$420.00	7/24/2007	Closed Lost	

5. To choose different related objects simply click on the blue hyperlink at the top of the table.

Merge Results

Merge Results allows users to merge 2 different sets of data together and then be able to view and export the results.



First Name	Last Name	Company	State/Province	Email	Status
Abhishek	Pandey	Center For Employment Opportunities, Inc.	NY	apandey@ceoworks.org	(
Ade	Beemster	ChevronTexaco Global Technology Svcs Co.	CA	adad@chevron.com	Demo Schec
Ade	Beemster	ChevronTexaco Global Technology Svcs Co.	CA	adad@chevron.com	Demo Schec
Ade	Cotter	ChevronTexaco Global Technology Svcs Co.	CA	adad@chevron.com	Demo Schec
Ade	Cotter	ChevronTexaco Global Technology Svcs Co.	CA	adad@chevron.com	Demo Schec
Ajay	Krishnaswamy	Tata Consultancy Services	CT	ajay.krishnaswamy@tcs.com	Demo Schec
Akbar	Rafiuddin	Precisio Business Solutions	NJ	arafiuddin@myinventorynow.com	(
Al	Schleicher	UBS Financial	New York	al.schleicher@ubs.com	(
Al	Schleicher	UBS Financial	New York	al.schleicher@ubs.com	(
Al	Schleicher	UBS Financial	New York	al.schleicher@ubs.com	(
Al	Morisato	Freddie Mac	Virginia	al_morisato@freddiemac.com	(
Al	Morisato	Freddie Mac	Virginia	al_morisato@freddiemac.com	(
Al	Morisato	Freddie Mac	Virginia	al_morisato@freddiemac.com	(
Al	Hall	Capital One Financial Corp.	Virginia	al.hall@capitalone.com	(
Al	Hall	Capital One Financial Corp.	Virginia	al.hall@capitalone.com	(
Al	Hall	Capital One Financial Corp.	Virginia	al.hall@capitalone.com	(
ALAN	LUNDER	BLACK DIAMOND	MA	alunder@bdfire.com	Demo Schec
ALAN	LUNDER	BLACK DIAMOND	MA	alunder@bdfire.com	Demo Schec
ALAN	LUNDER	BLACK DIAMOND	MA	alunder@bdfire.com	Demo Schec

To Merge Results the user must:

1. Create multiple Snapshots of different sets of data. (ex: Lead with Emails).

2. Click on the Snapshot and load the first data set

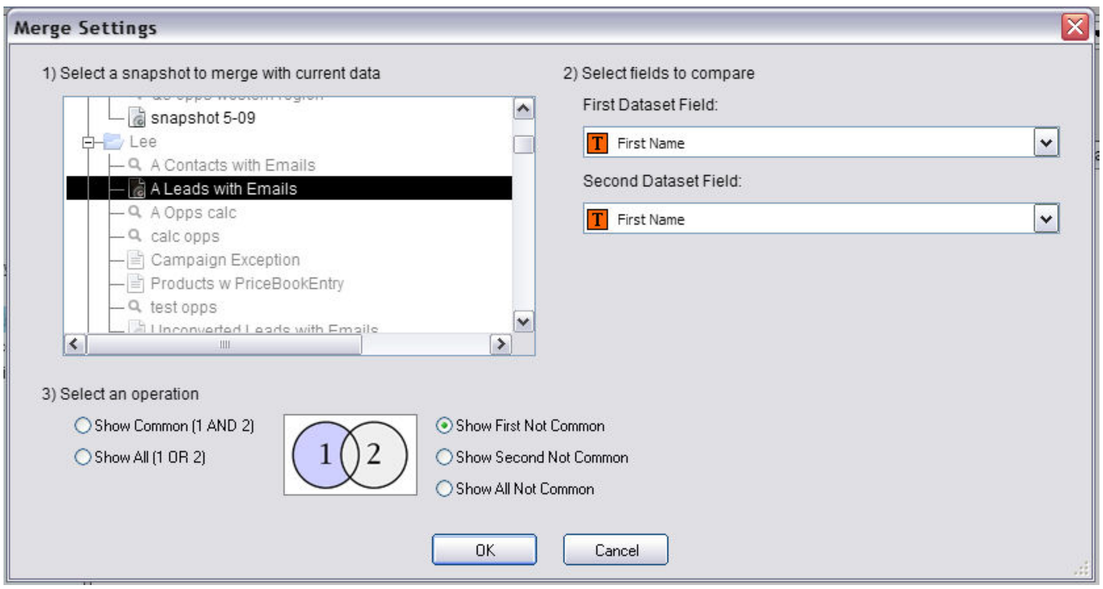
3. Once the data is displayed, click on the Actions Menu and select Merge Results

4. Once selected, the Merge Settings dialog box will appear. Here users must:

   A. Select a snapshot from the selection box on the left to merge with current data

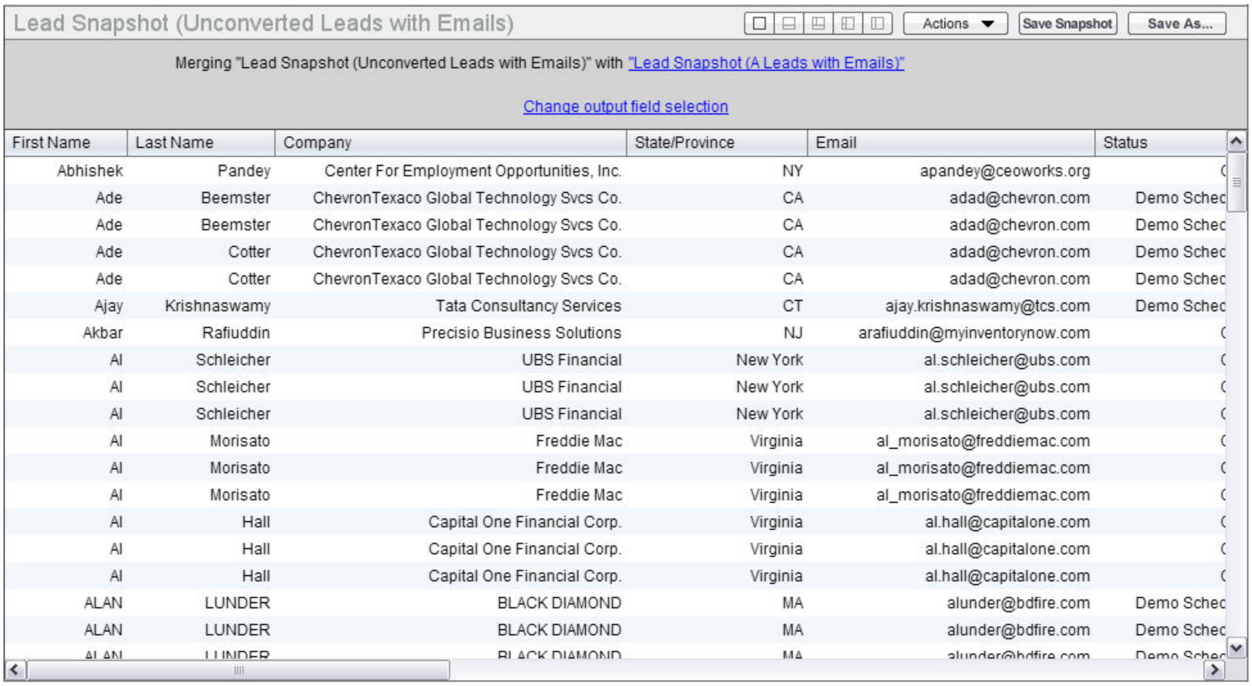
B. Next, select the dataset they want to merge from drop down menus on the right.
C. Next select an operation from the following options on the bottom left:
- Show Common (1 AND 2) – This will show fields that are common only.
- Show All (1 OR 2) – This will show all fields.

D. Then select one of the following options:
- Show First Not Common
- Show Second Not Common
- Show All Not Common



The Merge Results does not save the properties or the settings, thus the properties/settings must be manually set each time you merge datasets.

5. After all selections have been made, a list of results will be displayed in the dialog box.



Lead Snapshot (Unconverted Leads with Emails)

Actions | Save Snapshot | Save As...

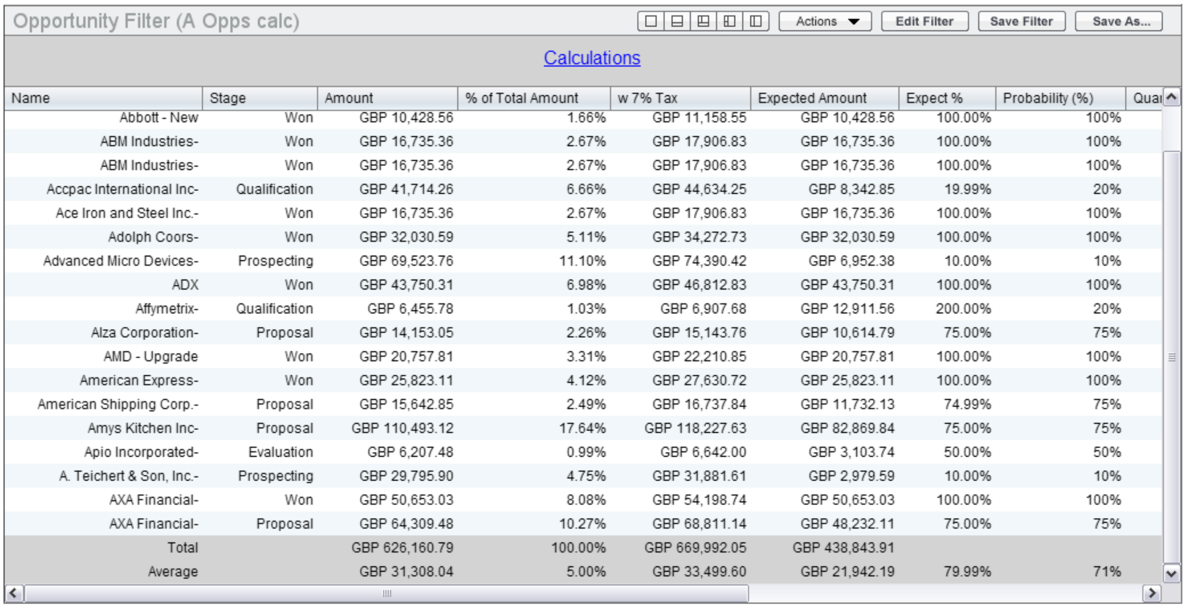
Merging "Lead Snapshot (Unconverted Leads with Emails)" with "Lead Snapshot (A Leads with Emails)"

Change output field selection

First Name	Last Name	Company	State/Province	Email	Status
Abhishek	Pandey	Center For Employment Opportunities, Inc.	NY	apandey@ceoworks.org	(
Ade	Beemster	ChevronTexaco Global Technology Svcs Co.	CA	adad@chevron.com	Demo Schec
Ade	Beemster	ChevronTexaco Global Technology Svcs Co.	CA	adad@chevron.com	Demo Schec
Ade	Cotter	ChevronTexaco Global Technology Svcs Co.	CA	adad@chevron.com	Demo Schec
Ade	Cotter	ChevronTexaco Global Technology Svcs Co.	CA	adad@chevron.com	Demo Schec
Ajay	Krishnaswamy	Tata Consultancy Services	CT	ajay.krishnaswamy@tcs.com	Demo Schec
Akbar	Rafiuddin	Precisio Business Solutions	NJ	arafiuddin@myinventorynow.com	(
Al	Schleicher	UBS Financial	New York	al.schleicher@ubs.com	(
Al	Schleicher	UBS Financial	New York	al.schleicher@ubs.com	(
Al	Schleicher	UBS Financial	New York	al.schleicher@ubs.com	(
Al	Morisato	Freddie Mac	Virginia	al_morisato@freddiemac.com	(
Al	Morisato	Freddie Mac	Virginia	al_morisato@freddiemac.com	(
Al	Morisato	Freddie Mac	Virginia	al_morisato@freddiemac.com	(
Al	Hall	Capital One Financial Corp.	Virginia	al.hall@capitalone.com	(
Al	Hall	Capital One Financial Corp.	Virginia	al.hall@capitalone.com	(
Al	Hall	Capital One Financial Corp.	Virginia	al.hall@capitalone.com	(
ALAN	LUNDER	BLACK DIAMOND	MA	alunder@bdfire.com	Demo Schec
ALAN	LUNDER	BLACK DIAMOND	MA	alunder@bdfire.com	Demo Schec
ALAN	LUNDER	BLACK DIAMOND	MA	alunder@bdfire.com	Demo Schec

Cell Calculations

The Cell Calculations report allows you to add calculated columns and display row summaries on your List results.



Opportunity Filter (A Opps calc)

Actions | Edit Filter | Save Filter | Save As...

Calculations

Name	Stage	Amount	% of Total Amount	w 7% Tax	Expected Amount	Expect %	Probability (%)	Qua
Abbott - New	Won	GBP 10,428.56	1.66%	GBP 11,158.55	GBP 10,428.56	100.00%	100%	
ABM Industries-	Won	GBP 16,735.36	2.67%	GBP 17,906.83	GBP 16,735.36	100.00%	100%	
ABM Industries-	Won	GBP 16,735.36	2.67%	GBP 17,906.83	GBP 16,735.36	100.00%	100%	
Accpac International Inc-	Qualification	GBP 41,714.26	6.66%	GBP 44,634.25	GBP 8,342.85	19.99%	20%	
Ace Iron and Steel Inc.-	Won	GBP 16,735.36	2.67%	GBP 17,906.83	GBP 16,735.36	100.00%	100%	
Adolph Coors-	Won	GBP 32,030.59	5.11%	GBP 34,272.73	GBP 32,030.59	100.00%	100%	
Advanced Micro Devices-	Prospecting	GBP 69,523.76	11.10%	GBP 74,390.42	GBP 6,952.38	10.00%	10%	
ADX	Won	GBP 43,750.31	6.98%	GBP 46,812.83	GBP 43,750.31	100.00%	100%	
Affymetrix-	Qualification	GBP 6,455.78	1.03%	GBP 6,907.68	GBP 12,911.56	200.00%	20%	
Alza Corporation-	Proposal	GBP 14,153.05	2.26%	GBP 15,143.76	GBP 10,614.79	75.00%	75%	
AMD - Upgrade	Won	GBP 20,757.81	3.31%	GBP 22,210.85	GBP 20,757.81	100.00%	100%	
American Express-	Won	GBP 25,823.11	4.12%	GBP 27,630.72	GBP 25,823.11	100.00%	100%	
American Shipping Corp.-	Proposal	GBP 15,642.85	2.49%	GBP 16,737.84	GBP 11,732.13	74.99%	75%	
Amys Kitchen Inc-	Proposal	GBP 110,493.12	17.64%	GBP 118,227.63	GBP 82,869.84	75.00%	75%	
Apio Incorporated-	Evaluation	GBP 6,207.48	0.99%	GBP 6,642.00	GBP 3,103.74	50.00%	50%	
A. Teichert & Son, Inc.-	Prospecting	GBP 29,795.90	4.75%	GBP 31,881.61	GBP 2,979.59	10.00%	10%	
AXA Financial-	Won	GBP 50,653.03	8.08%	GBP 54,198.74	GBP 50,653.03	100.00%	100%	
AXA Financial-	Proposal	GBP 64,309.48	10.27%	GBP 68,811.14	GBP 48,232.11	75.00%	75%	
Total		GBP 626,160.79	100.00%	GBP 669,992.05	GBP 438,843.91			
Average		GBP 31,308.04	5.00%	GBP 33,499.60	GBP 21,942.19	79.99%	71%	

Before you run the Calculations report you must first decide if they want to add a calculated column or a calculated row to their List of results.

To add a calculated column to their List of results, simply follow the directions below:

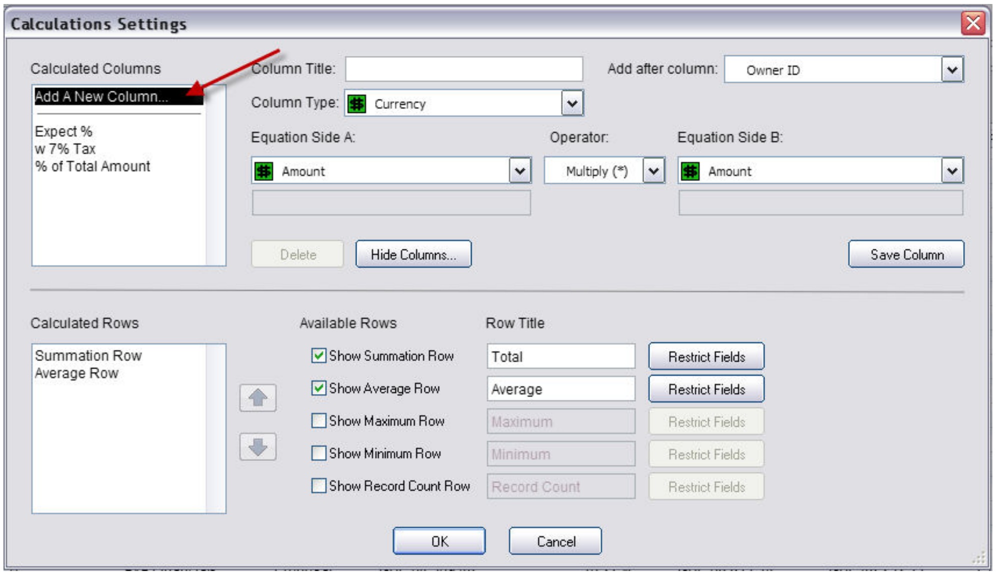
1. Create a Filter and create a List of results (Ex: All Opportunities that start with the letter A)

2. Click on the Actions Menu and select the Calculations command

3. Once selected, the Calculations dialog box will appear. Here is where you decide what type of column you want to add to the List. There are a number of options to choose from including the following:

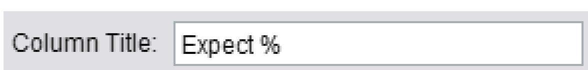
Currency
Percent
Integer
Double

4. To add the column, click on the Add A New Column button in the top left corner box under Calculated Columns.

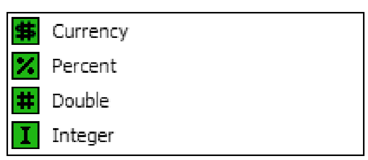


5. Once selected, now the user must add the following information:

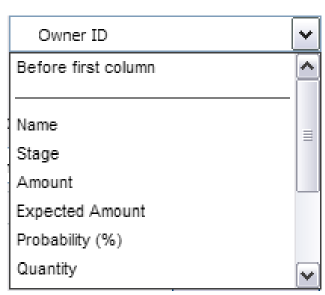
Column Title – here is where you give the new column a name. (Ex: Except %)



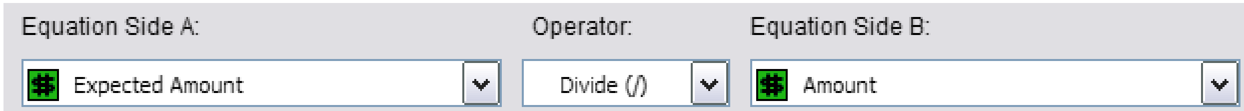
Column Type – Here you select what type of column you want to add. You can choose from the following options:



Add after column – Next, you can select what column you want to add this column after from the following options:

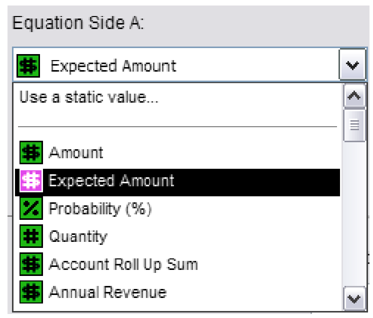


Equation – Next is where you build the equation and or formula field on the fly that you want to calculate.

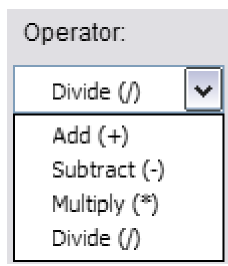


The Equation is separated into three drop down menus including the following:

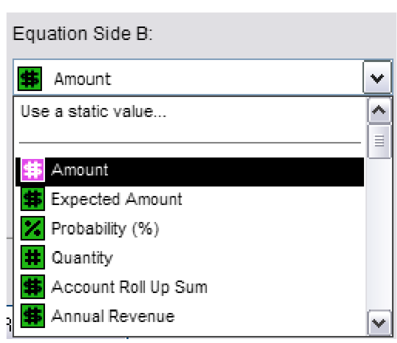
Equation Side A – Here is where select the field that you want to serve as the first part of the equation from the drop down menu.



Operator – Next, you select the operator for the equation from the following list:

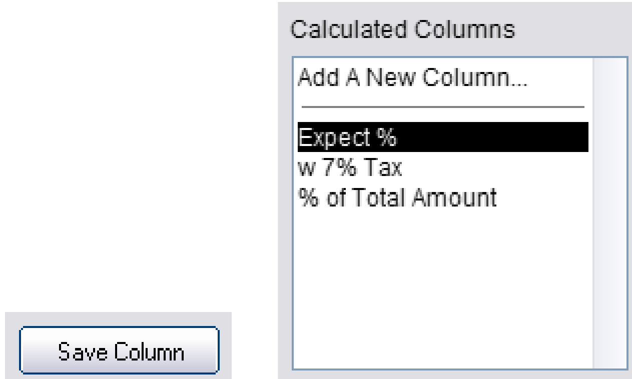


Equation Side B – Here is where select the field that you want to serve as the second part of the equation from the drop down menu.

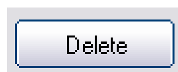


Once you have created your equation ad are ready to save it, simply click on the Save Column button and the new calculated column will populate

dreamfactory
innovation on demand

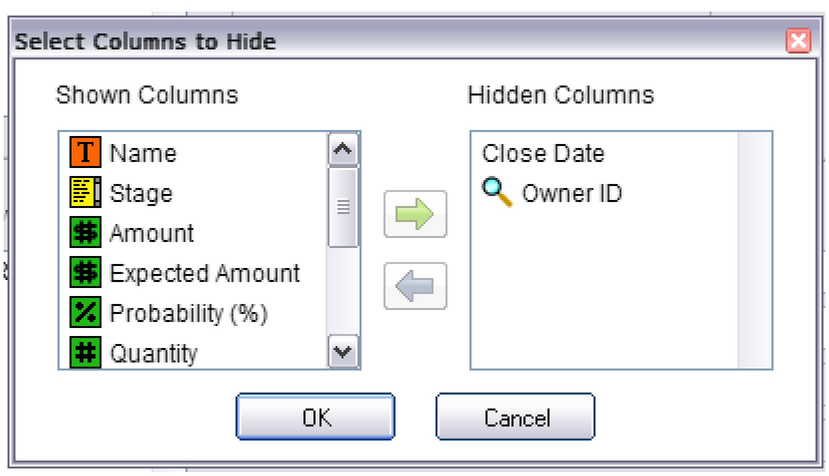


Users can also delete Calculated Columns by clicking the Delete button.



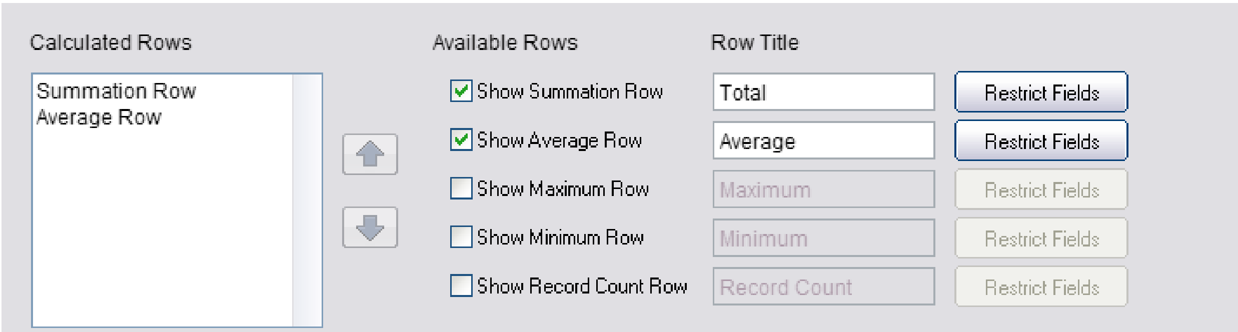
Users can also hide columns if they wish by clicking on the Hide Columns button.

Once clicked, the Select Columns to hide dialog box will appear. Here is where users can select which columns they want to display and which columns they want to hide in the List of results.

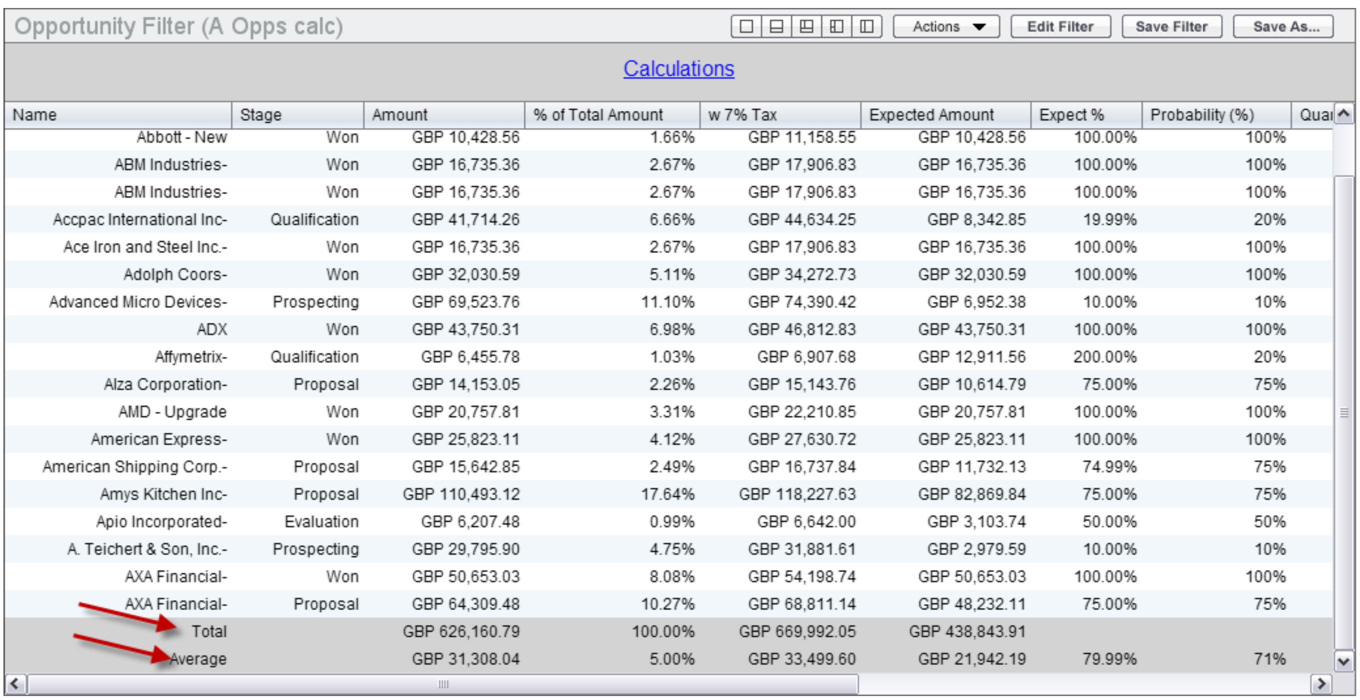


Users also have the ability to add Calculated Rows to their List. Here users can add summaries of existing information to the bottom of the List of Records. Simply check the box of Available Rows to add the row to the List. Users can customize the Row Title if desired in the text box underneath Row Title.

In addition, users can restrict fields that they do not want to be displayed by clicking the Restrict Fields button on the far right of the dialog box.



Once users have created the calculated columns and Rows and added them to the List of Records, it will look like this.



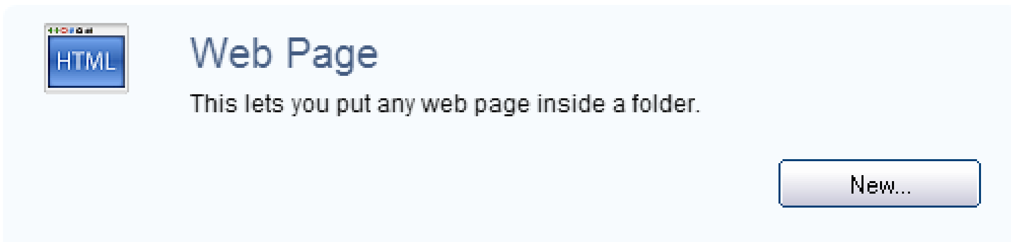
Name	Stage	Amount	% of Total Amount	w 7% Tax	Expected Amount	Expect %	Probability (%)	Qua
Abbott - New	Won	GBP 10,428.56	1.66%	GBP 11,158.55	GBP 10,428.56	100.00%	100%	
ABM Industries-	Won	GBP 16,735.36	2.67%	GBP 17,906.83	GBP 16,735.36	100.00%	100%	
ABM Industries-	Won	GBP 16,735.36	2.67%	GBP 17,906.83	GBP 16,735.36	100.00%	100%	
Accpac International Inc-	Qualification	GBP 41,714.26	6.66%	GBP 44,634.25	GBP 8,342.85	19.99%	20%	
Ace Iron and Steel Inc.-	Won	GBP 16,735.36	2.67%	GBP 17,906.83	GBP 16,735.36	100.00%	100%	
Adolph Coors-	Won	GBP 32,030.59	5.11%	GBP 34,272.73	GBP 32,030.59	100.00%	100%	
Advanced Micro Devices-	Prospecting	GBP 69,523.76	11.10%	GBP 74,390.42	GBP 6,952.38	10.00%	10%	
ADX	Won	GBP 43,750.31	6.98%	GBP 46,812.83	GBP 43,750.31	100.00%	100%	
Affymetrix-	Qualification	GBP 6,455.78	1.03%	GBP 6,907.68	GBP 12,911.56	200.00%	20%	
Alza Corporation-	Proposal	GBP 14,153.05	2.26%	GBP 15,143.76	GBP 10,614.79	75.00%	75%	
AMD - Upgrade	Won	GBP 20,757.81	3.31%	GBP 22,210.85	GBP 20,757.81	100.00%	100%	
American Express-	Won	GBP 25,823.11	4.12%	GBP 27,630.72	GBP 25,823.11	100.00%	100%	
American Shipping Corp.-	Proposal	GBP 15,642.85	2.49%	GBP 16,737.84	GBP 11,732.13	74.99%	75%	
Amys Kitchen Inc-	Proposal	GBP 110,493.12	17.64%	GBP 118,227.63	GBP 82,869.84	75.00%	75%	
Apio Incorporated-	Evaluation	GBP 6,207.48	0.99%	GBP 6,642.00	GBP 3,103.74	50.00%	50%	
A. Teichert & Son, Inc.-	Prospecting	GBP 29,795.90	4.75%	GBP 31,881.61	GBP 2,979.59	10.00%	10%	
AXA Financial-	Won	GBP 50,653.03	8.08%	GBP 54,198.74	GBP 50,653.03	100.00%	100%	
AXA Financial-	Proposal	GBP 64,309.48	10.27%	GBP 68,811.14	GBP 48,232.11	75.00%	75%	
Total		GBP 626,160.79	100.00%	GBP 669,992.05	GBP 438,843.91			
Average		GBP 31,308.04	5.00%	GBP 33,499.60	GBP 21,942.19	79.99%	71%	

Web Page

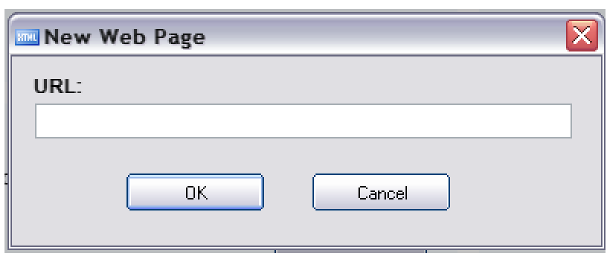
TableTop allows users to easily create quick links to web pages that they visit frequently.

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.

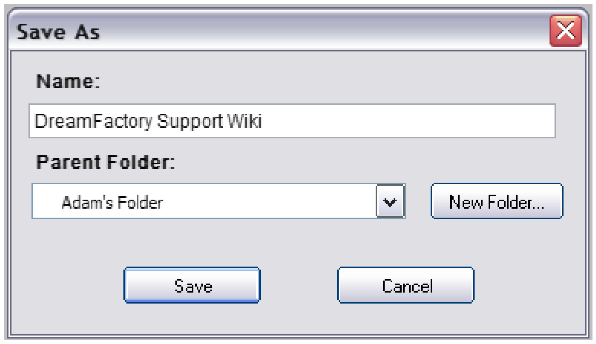


The New Web Page dialog will appear where the user can type the Web Page URL and then click OK.

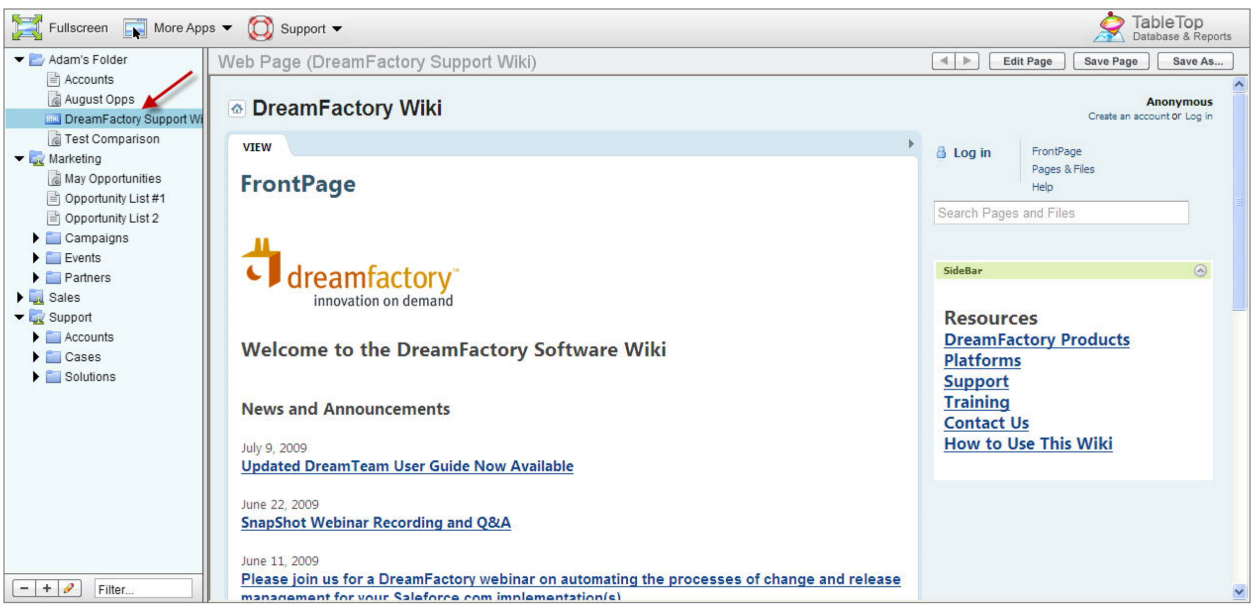


The Web Page will automatically load once created.

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.

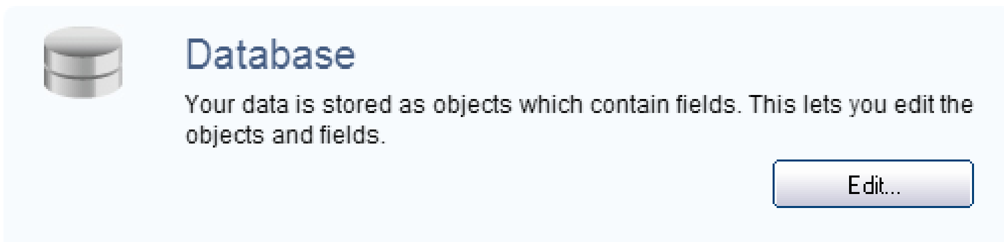


Database

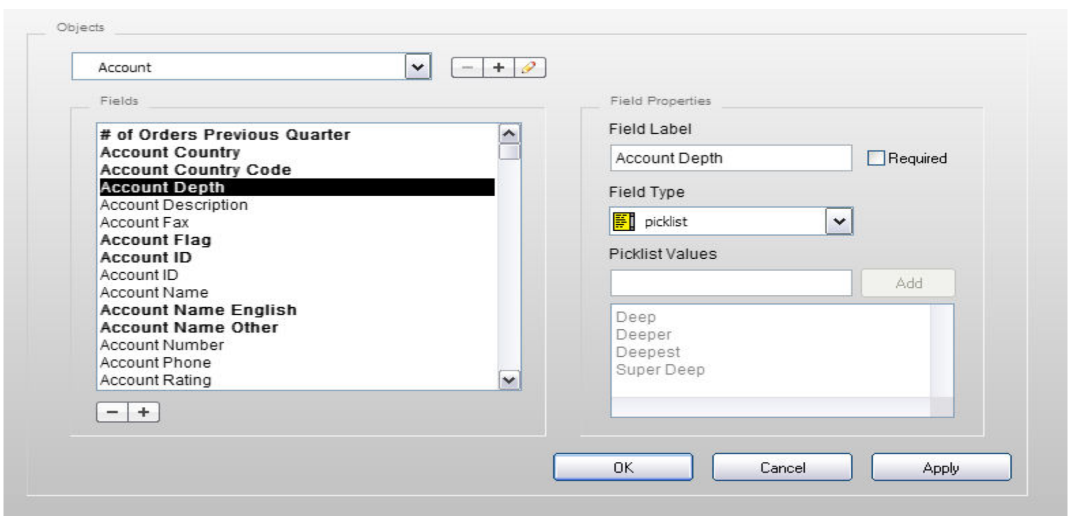
TableTop enables users to easily make manual edits to the database.

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.

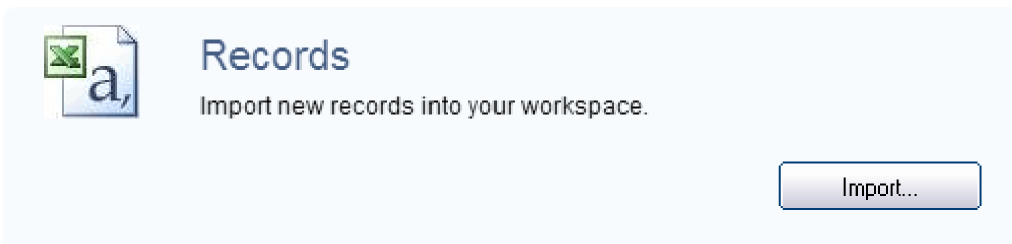


Records

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.