

Key Features

Easily create screens to reflect and manage your own ways of working. Build your own tab to be added to a single file or all Contact files, Events, Campaigns or Bookings.

- Add any number of fields to fully customise the way data is labelled and stored.
- Field options include Dates, Times, Text, Check boxes, Numbers, Amounts & Totals, Tasks, Financial Movements, Unique numbers and drop lists.
- Communications can be included to provide a secure area to store sensitive information.
- Link fields together in either Groups or Panels.
- Only those with appropriate security access can view the tab.
- Move the order of each field as required within the template.
- Fields added to the template are available within the Query function to produce reports.
- Entry list can be set up if there is expected to be multiple entries.

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