



## Investing in your Future with Stonefield Query for ACT!

### Company Name

FimAT

### Established

1986

### City

Montreal, PQ Canada

### Website

[www.fimat.com](http://www.fimat.com)

### Contact

Bruce Thompson

### Title

Sr. V.P. of Global Services

### Industry

Financial

### Query Version

Stonefield Query for ACT!

### Dealer

Basis Business Intelligence

### City

Toronto, ON Canada

### Website

[www.basisintelligence.com](http://www.basisintelligence.com)

### Contact

Jeff Satenstein

### Notable Quotes

"I like Stonefield Query because it is a powerful tool that is simple to use even if you only have basic computer skills."

**Jeff Satenstein**

### FimAT in the Spotlight

FimAT is an institutional brokerage firm located in Montreal, Quebec. They specialize in derivatives and have offered brokerage, investment, and global asset management services since 1986.

Bruce Thompson is the Senior Vice President in Charge of Global Services. In 2005, Bruce was one of decision makers responsible for overseeing the implementation of ACT! and Stonefield Query for ACT!.

### The FimAT Problem

FimAT trades stocks for large organizations and required a different configuration of ACT! compared to most sales oriented firms. There can be multiple buyers, sellers, and FimAT representatives involved in each trade. To ensure that no mistakes are made, they adopted a standard practice of documenting all forms of communication related to the execution of a trade.

After the conversion to ACT! was complete, they encountered a problem the first time they attempted to create a report. They were building a customized mail merge for existing and prospective customers and found the reporting tools in ACT! very difficult to work with. They could not create a document with all of the required information and ACT! had a problem merging data separated by a colon or a space.

FimAT knew immediately that if ACT!'s basic reporting tools were this complicated then the advanced reporting tools would not meet their needs. "If ACT! can not create a simple mail merge for invitations and mailing labels," said Bruce, "then how can anyone expect it to handle a detailed report on a complex trade?" They needed to find an easy-to-use data mining and reporting solution with the ability to handle multi-contact transactions.

### The Stonefield Solution

Jeff Satenstein is a certified ACT! consultant with Basis Business Intelligence. After discussing with Bruce the trouble he was having with the report writer in ACT!, Jeff recommended Stonefield Query for ACT! as the data mining and report-writing solution.

Before FimAT purchased Stonefield Query for ACT!, they attended a free online webinar and downloaded the free thirty-day trial version of the software. When they finished setting up Stonefield Query, Bruce sat down with Stonefield and learned the basics of the program. In a short period of time he was confident he could design reports for FimAT. "After I demoed Stonefield Query and saw what it was capable of, my first thought was how fast can I get it," said Bruce. "I was really impressed with how easy it is to learn."

"I know there are a lot of report writers that people struggle with. Bruce found the report writer in ACT! very painful to use," said Jeff. "I like Stonefield Query because it is a powerful tool that is simple to use even for someone with basic computer skills."

### The Result

Bruce loves Stonefield Query. He finds it straight forward and much easier to use than the reporting tools in ACT!. They created a variety of customized mail outs and do not worry about having to rework an incomplete document.

FimAT has used Stonefield Query for ACT! since July 2005. They have recently upgraded to the latest version of the software.

Stonefield Query for ACT! has given FimAT the ability to easily create everything from a simple mail merge to reports that document all the details of a trade. "Compared to the report writer in ACT! Stonefield Query comes loaded with features that are easier to use and a lot better than what you would find in ACT!," said Bruce.