



Right on the Money with Stonefield Query for ACT!

Company Name

Active Money Management

Established

1985

City

Phoenix, Arizona USA

Website

www.gammi.com

Contact

Coelle Baskel

Title

IT Coordinator

Industry

Financial Services

Query Version

Stonefield Query for ACT!

Dealer

Power Time Corporation

City

Houston, TX USA

Website

www.powertime.com

Contact

Susan Eckles

Notable Quotes

"If you need more than just a basic report writer for your database or contact management software, Stonefield Query is the only solution."

Susan Eckles

Active Money Management in the Spotlight

Active Money Management is an insurance and financial services specialist located in Phoenix, Arizona. For over 22 years, they have offered a wide variety of investment, insurance, financial planning and accounting services.

Coelle Baskel joined the company in 2005 as the IT Coordinator. Around this time Active Money Management was in the process of switching from Tele-Magic to ACT!.

The Active Money Management Problem

Active Money Management required a very different implementation of ACT! compared to most sales oriented firms. When the conversion to ACT! was completed, it was Coelle's responsibility to design all of the client status and project management reports.

"I had a look at the reporting tools in ACT!, and they were terribly confusing. I found that it did not have adequate instructions on how to use the reporting features," said Baskel. "There were a lot of sample reports in ACT!, but none of the reports worked for us on the financial end. It seemed that the standard reports were geared more towards sales."

Coelle needed an easy-to-use report writer with the ability to create reports based on individual clients, for specific periods of time, and specific projects. The ACT! report writer was not flexible enough for their sorting, sequencing, and filtering requirements. Because of the inflexibility of these features in ACT!, Active Money Management had no way of tracking the status or progress of projects that they were working on for clients.

The Stonefield Solution

Susan Eckles is an ACT! certified consultant with the Power Time Corporation. She worked with Active Money Management to set up and customize their ACT! system. The Power Time Corporation first discovered Stonefield Query in 2002 at an ACT! conference. Since then Stonefield Query has become a standard part of their toolkit.

After discussions with Coelle about her needs, Susan recommended Stonefield Query for ACT! as the reporting solution. "If you need more than just a basic report writer for your database or contact management software, Stonefield Query is the only solution," said Eckles. "It is so flexible that it can literally expand the capability of whatever program you are using it with."

The Result

Coelle found that Stonefield Query for ACT! is a very intuitive product that made her job a lot easier. She now has the ability to create reports by business unit, product, priority, and many other breakdowns required by management. She can easily modify reports, sort data, and present information in an easy-to-read and professional report.

Active Money Management has used Stonefield Query for ACT! since October 2005, and have recently upgraded to the latest version of the software.

"Although I have some basic programming skills given my IT background, I believe that anyone with rudimentary computer skills could easily create reports themselves using Stonefield Query," said Baskel. "Stonefield Query is a superior reporting product that is very easy to use and very user friendly."



Canada and USA
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