

# Stonefield Query Reporting for ACT!



Stonefield Query for ACT!® is a user-friendly database report writing, query, and data mining tool designed specifically for ACT! You no longer need to call an IT specialist every time you need a report. Now your sales people, administrative staff, and management can create their own reports in minutes.

**Stonefield Query for ACT! can handle virtually all of your reporting needs.**

## Stonefield Query Reporting Features

- **Simple "Wizard" Interface:** After selecting a report from the list of available reports, you can select the sort order, enter filter conditions, and specify where the output goes (printer, text file, spreadsheet, screen preview, email, etc.).
- **User-Friendly Names:** Full English descriptions for all fields and tables rather than cryptic names and symbols. English operators such as "equals" and "greater than" instead of "=" and ">."
- **"Real" Table/Field Names:** Alternatively you can display "real" table and field names so it's easier to locate the table or field you want if you're familiar with these names.
- **Knows Your Data:** You don't have to know how your data is stored or how tables are joined (you don't even have to know what a "join" is). Stonefield Query handles complex join conditions between tables automatically.
- **Many Report Types:** Quick Reports (row and column layout), Cross-Tabulation Reports (like pivot tables, for analysis), Charts/Graphs (pie, bar, etc.), Labels (mailing, barcode, etc) and External Reports (Foxpro or Crystal Reports).
- **Label Wizard:** Easily create labels, including mailing labels, product labels, or barcode labels, without worrying about field positioning or label dimensions. All the common Avery label sizes are built-in.
- **Field Customization:** Control font, color, alignment, heading, and column width for each field with a mouse click. You can even let Stonefield Query automatically adjust a field's column width to match the widest amount of data in the column.
- **Data Grouping and Sorting:** Group and sort on any field with a mouse click.
- **Report Preview:** See what the report will look like at each step of the report building process. There's no need to save and exit before viewing.
- **Output Options:** Stonefield Query supports output to comma-delimited (.csv), Image Formats (.bmp, .gif, .jpeg, .png, .tiff), Microsoft Excel® (.xls), Microsoft Word® (.doc), Open Office

(Calc & Writer), PDF, Rich Text Format (.rtf), Table Format (.dbf), Text (.txt), Web Page (.htm), XML, and XPS (.xps).

- **Email Reports:** Use a SMTP or MAPI email client to quickly email reports through Stonefield Query (in any file format listed above).
- **Formula Editor:** You can define your own custom calculations to use in any report.
- **Live Links:** This allows you to create reports that drill down to other reports (for example, clicking on a customer name to show the sales for that customer) or automatically bring up someone's email address in your email program or Web site in your browser.
- **Report Templates:** Give your reports a common appearance, such as following corporate style guidelines. Choose from one of the supplied templates or use the Template Editor to build your own.
- **Report Scheduler:** Automate reports that need to go out on a regular basis.
- **Role-based Security:** Control access to a single report, group of reports, and/or specific modules by assigning users to groups. This allows you to restrict access to sensitive data.
- **Share Reports:** Import reports so you can use report layouts designed by other users or consultants. Export reports so you can share report layouts with other users.
- **Advanced Report Designer:** Customize the report layout beyond the report wizard settings using the Advanced Report Designer for complete report control.
- **Exclusion Filters:** this allows you to query on the absence of data, such as "give me a list of customers I didn't contact last year" or "give me a list of everyone who did not buy product X". Behind the scenes, Stonefield Query generates a NOT IN subquery, but from the end-user's perspective, it's just as easy as creating a normal filter.
- **Customize SQL Select:** Stonefield Query automatically generates an SQL Select statement for the report once fields have been selected. Advanced users can customize the statement if desired.
- **Detailed Help File:** Read through detailed online help or 410+ page PDF reference manual. Topics include Tutorials, Using Stonefield Query, Menu Functions, How To, and Frequently Asked Questions.
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## ACT! Specific Features

- Stonefield Query works with the following ACT! versions: 3.0, 4.0, 2000 (5.0), 2004 (6.0), 2005 (7.0), 2006 (8.0), 2007 (9.0), 2008 (10.0), 2009 (11.0, 11.1), and 2010 (12.0, 12.1).
- Automatically detects custom fields and custom sub-entities, and allows reporting on these items just like the stock ACT! tables and fields.
- More than 160 pre-defined reports are available. These reports alone are worth the price of Stonefield Query!
- Use Stonefield Query to create new and update existing ACT! Groups using any filter criteria.
- Multi-Database Support: A single report can be run against each of your ACT! databases without making changes to the report.
- Data can be extracted from anywhere in ACT!, including Activities, Sales/Opportunities and Notes/History.
- Stonefield Query for ACT! can report on information in QuoteWerks, a quoting system that integrates seamlessly with ACT!.
- Stonefield Query can report on data stored in ACT! by Swiftpage. Stonefield Query comes with over 10 pre-defined sample reports for use with Swiftpage data.