

Sage ACT! | White Paper

Sage ACT! Connect – *Now works with iPhone®!*

Work at the Speed of Light



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Run Your Business Faster Than Ever

We are living in an age in which rapidly advancing technology has brought even the most foundational scientific theories into question.

Certainly, Albert Einstein would be shocked to learn that some subatomic particles may move faster than the speed of light¹. But he would also be amazed to watch a professor in astrophysics connect his Apple® iPad® to a SMART Board® and present a lecture. Imagine Einstein's surprise when the same man goes on to use his iPad tablet and Skype® software to videoconference with a distant colleague, sell a few shares of stock, and finally open a calendar reminder of a wedding anniversary that prompts him to visit OpenTable® for a dinner reservation.

After following an iPad or smartphone user for a day, Einstein might conclude that everything is moving faster than the speed of light in this new world of work. Today's office has no walls. Business can take place anywhere, at anytime.

The past few years have been a proving ground for organizations of all sizes and complexity—and for small and midsized businesses (SMBs) in particular. Without the deep coffers of larger companies, the SMBs that have survived and now thrive in our new economy have succeeded in part on their ability to be nimble and flexible.

Small and midsized businesses rely heavily on mobility. The typical SMB employer has 25% of staff working outside the office at any given moment. These businesses reported that mobile workers lost an average of 5-6 hours per worker, per week due to mobile applications being less effective than office applications.

—Webtorials/Fonality State-of-the-Market 2011 Report:
Mobility Trends in SMBs, as reported by **NetworkWorld**
and **SMBTechReport**

There are many great survival stories emerging from the global recession, and successful businesses share some common factors, including a passion for delivering a superior customer experience. Living and breathing that value erases the lines between work and personal life. To maximize productivity, we have to live by one, 24-hour clock, and balance immediate priorities against less pressing ones, whether they are professional or personal. That means having access to key customer and work-related data from home and likewise being able to access personal information from work.

¹ Physicists at the CERN particle accelerator have observed subatomic particles, called neutrinos, moving faster than the speed of light. If confirmed, these findings would have an impact on Einstein's special theory of relativity.

Mobile devices such as smartphones and tablet computers have been a great enabler of this new way to work. The portability, flexibility, and power of these devices makes them essential productivity tools for successful business owners, salespeople, and independent professionals. To support Sage ACT! users who rely on mobile devices to perform at their best, Sage developed Sage ACT! Connect, a subscription-based service that delivers your contacts and calendar to iPad, iPhone®, BlackBerry®, Windows Mobile®, and Android™ devices².

Sales Trip to Chicago: A Day in the Life With Sage ACT! Connect

6:00 a.m.: Linda wakes up and her checks email and Sage ACT! calendar from her laptop before her busy day begins.

8:15 a.m.: Linda grabs her suitcase and heads for the airport. Once she's passed security, she uses her iPhone to make some customer calls, notes a change in a meeting for next week in her calendar, and receives some new customer information on the account she's headed to meet in Chicago.

Noon: From her rental car, Linda pulls up the updated address of her customer by accessing Sage ACT! Connect from her iPad and maps the address directly in her navigation app.

12:40 p.m.: Waiting in the lobby, Linda reviews the latest historical interactions between her company and the customer via notes and history, so she can speak intelligently about past interactions and future needs.

4:10 p.m.: Linda is back at the airport where, using her tablet, she quickly and easily updates the customer's contact record with a new note about their meeting and sends the customer a follow-up email.

4:25 p.m.: Meanwhile, in the office, Linda's assistant is placing a new service agreement for this customer on Linda's desk. Because her company setup the workgroup sync feature of Sage ACT! Connect, the assistant was able to use the information Linda updated in the customer's contact record to prepare the agreement before Linda returns to the office.

² Review Sage ACT! Connect system requirements at www.act.com/connectsystreq to confirm supported mobile phones, tablets, and web browsers.

Who Benefits From Sage ACT! Connect?

Sage ACT! Connect is designed to support varied roles in diverse industries based upon their need for mobile access to Sage ACT! data.



Small Business Owners

As a small business owner, you wear many hats, and you take them all with you, wherever you go. You may spend very little time in your office, instead traveling from meetings with prospects to client visits and consultations with suppliers. To maintain the profitability of your small business, you need ready access to current information about customers, prospects, and vendors. You don't have time to run back to your office for reports between appointments or to wait until the end of the day to receive urgent news about a key account. Using Sage ACT! Connect through your smartphone or tablet can keep you prepared to jump on new opportunities and ready to handle any business issue, armed with accurate and current information.



Sales Representatives

The world of sales has changed drastically as the Internet has placed so much information in the hands of your customers. New prospects arise from channels you may not have been working, and when that happens, time is of the essence. You may have only hours to schedule and prepare for a meeting and no physical office to use as home base. If you have a list of things you'd never want to lose, your smartphone or tablet is probably right at the top.

Sage ACT! Connect gives you virtually anywhere access to all of the data you rely on Sage ACT! to manage and maintain. You can't afford to lose a minute when you're out in the field, and Sage ACT! Connect ensures that you won't lack access to client and prospect data or visibility to activities on your calendar.



Independent Professionals

Finance, real estate, and insurance professionals choose Sage ACT! as the ideal Contact and Customer Management solution to support their business efforts. If you're in a contact-driven business, you understand that being aware of the latest changes in information is critical to maintaining valuable relationships that sustain your book or portfolio.

Sage ACT! Connect provides live updates to all your vital contact information and gives you mobile access to all the data you need to drive your business.

Industry Trends in Mobile Devices

Small and Midsized Companies Have Gone Mobile in a Big Way

Small and midsized businesses have been early adopters of mobile devices and tablets, relying on technology to create new efficiencies and support a superior customer experience. A recent study examining current and projected technology investment by SMBs found the highest adoption rates in Cloud computing and mobile technologies³. In fact, a recent Sage survey discovered that over 70% of Sage ACT! customers use a smartphone for business⁴.

Tablets Are Replacing Desktop and Laptop Computers

Industry analysts have noted a strong trend toward the adoption of tablets and mobile devices with tablet sales projected to reach \$69 million in 2011 and smartphone users expected to exceed \$460 million⁵. Tablet computers such as the iPad are not just another fun gadget to their users. Their portability and ease of use make them the preferred device of many users. According to a tablet user survey, 77% report using desktops and laptops less after buying a tablet and a significant 28% of users have replaced a PC or laptop with a tablet⁶.

Mobile Devices Are Used Extensively for Contact and Calendar Management

Of Sage ACT! users with a mobile device, 93% report using it to lookup contact information, 79% to view their calendars, and 72% to view contact details such as notes and history.

A recent study examining current and projected technology investment by SMBs found the highest adoption rates in Cloud computing and mobile technologies³.



Figure 1: Sage ACT! Connect delivers your contacts and calendar to your smartphone or tablet; plus, you can access the Sage ACT! Connect website from your computer anytime you're online⁷.

³ <http://www.destinationcrm.com/Articles/Columns-Departments/Insight/SMBs-to-Become-More-Mobile-and-Competitive%09-77662.aspx>

⁴ Sage ACT! in product survey, January 2011

⁵ Gartner, April 2011

⁶ Admob, March 2011

⁷ Review Sage ACT! Connect system requirements at www.act.com/connectsystreq to confirm supported mobile phones, tablets, and web browsers.

Put the Cloud to Work for You

What is the Cloud?

Cloud computing is the delivery of services via the Internet instead of storage devices that require a physical location to maintain. In a Cloud-based service delivery, users access the solution through a web browser and both the software and the data are accessed from a high security data center. Many businesses now prefer Cloud solutions because of the efficiencies this mode of access creates in day-to-day business operations.

Companies relying on Cloud-based data security were found to increase data availability by nine percent on average and to recover four times faster from IT downtime than those relying on on-site hosted data.

—Aberdeen, May 2010

Many businesses now prefer Cloud solutions because of the efficiencies this mode of access creates in day-to-day business operations.

Key Benefits to Cloud-Based Solutions

Faster Onboarding

One of the primary benefits to a Cloud-based solution is that it is easy to get started. Depending on the nature of the application and the type of data to be managed, Cloud-based solutions may even be available immediately upon execution of an agreement.

Easy Access

Cloud-based solutions can be accessed from virtually anywhere. Mobility is particularly important to SMBs. Being able to access a productivity solution and its associated data through a web browser, regardless of the users location, provides a high level of flexibility and maximizes performance.

Secure Data

Data security is another big benefit of a Cloud-based solution. Cloud solution vendors can leverage the one-to-many approach and invest considerably more in the physical security of the data center than most small or midsize companies can afford. Multiple redundant systems and backups that would not be cost effective on an individual level, for many organizations are included as part of the service offering.

Reduced Costs

Cloud-based solutions are affordable choices for small and midsize businesses. In addition to offering greater security at a lower cost, Cloud solutions do not require substantial hardware or human resource investments. These solutions are priced by the number of users so the upfront costs to get started are low. Because of these budget-friendly benefits, Cloud-based solutions level the playing field for smaller businesses, helping them to compete better against larger corporations.

Sage ACT! Connect in the Cloud

Wherever you are, Sage ACT! Connect provides access to Sage ACT! from your favorite mobile devices⁸. As a subscription-based service that delivers your contacts and calendar to your iPhone, iPad, and more; Sage ACT! Connect puts all your contact details, notes, history, and activities in the Cloud⁹.



Figure 2: Watch the video tour to learn more about how Sage ACT! Connect can help you stay in touch with your business.

Access Sage ACT! From Virtually Anywhere

How It Works

Sage ACT! Connect works with a PC client on which Sage ACT! is installed. This can be a connection via a server or an individual PC. The PC syncs the data stored in Sage ACT! with Sage ACT! Connect servers. When a new contact or activity is added in Sage ACT! it is automatically replicated on the Sage ACT! Connect servers in the Cloud. Then a Sage ACT! Connect subscriber connects to the web via a mobile device, a tablet, or a remote PC and logs onto the Sage ACT! Connect service, where the new data has been added to the system¹⁰.

Sage ACT! Connect also works in reverse for users who install the mobile device client which syncs with the built-in address book and calendar on a mobile device¹¹. If a change is made to the calendar, if a new contact is added, or if a change is made to an existing item, those changes will sync to the Sage ACT! Connect servers in the Cloud, which in turn syncs back to the PC client on which Sage ACT! is installed. No matter where data is accessed or changed, it will be replicated.

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Flexibility and Ease of Use

Mobile Access

BlackBerry, Windows Mobile® and Android™ users can sync their device address book and calendar to Sage ACT! Connect¹². By accessing Sage ACT! Connect through an already familiar device interface, no training is needed, and users can begin benefiting from the solution immediately. Users are also able to take full advantage of mobile device tools such as caller ID, appointment reminder alarms, and navigational systems.

Remote Access for Users on the Move

Through web connectivity from a PC, laptop, or a tablet such as an iPad or iPhone, Sage ACT! Connect users can access the Sage ACT! Connect Cloud to view, add, and edit contact details, notes, history, and activities¹³. The Sage ACT! Connect Cloud can be accessed via Internet Explorer®, Firefox®, Google Chrome™, and Safari®¹⁴.

Simple Account Setup and Customization of Sync Options

Setting up a Sage ACT! Connect account is easy. Simply visit the Sage ACT! Connect website and register using an activation code. Once you've registered, you can use the PC client to set up sync preferences. Sync preferences are easy to customize and users have options to set the desired sync frequency and the types of data that will sync. Sync with certain mobile devices can also be customized, and users can choose to sync data both to and from a mobile device or to limit the sync to only one direction.

True Collaboration With Workgroup Sync

Workgroup Sync via Sage ACT! Connect gives your entire workgroup access to the latest Sage ACT! details. You can designate an individual PC or a server to sync on behalf of the entire workgroup. This places the most up-to-date information in the hands of your sales representatives without requiring them to sync individually from their computer. Users in the field will receive live updates to data, which improves productivity and facilitates a better customer service experience.



Figure 3: Your entire team will have access to the latest Sage ACT! details, because Sage ACT! Connect enables workgroups to stay in sync.

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¹³ Review Sage ACT! Connect system requirements at www.act.com/connectsystreq to confirm supported mobile phones, tablets, and web browsers.

¹⁴ Review Sage ACT! Connect system requirements at www.act.com/connectsystreq to confirm supported mobile phones, tablets, and web browsers.

How Is Sage ACT! Connect Different From Web-Based Email and Calendar Applications?

Some business owners and sales representatives might be tempted to use no-cost, web-based email services such as Google® Gmail® and Yahoo!® Mail to keep track of contacts and activities when they're on the road. These solutions do not offer a true and complete Contact and Customer Management solution. While you can keep email and contacts in these tools, you will not achieve the same kind of productivity improvements possible with Sage ACT!—including automation of routine sales and marketing tasks using Smart Tasks, excellent grouping and searching functionality, and integrated Connected Services (or features as a service), that can provide you with sales leads and e-marketing campaigns.

With Sage ACT!, every contact has a complete history that includes emails you have sent and received, documents you created, a log of your telephone calls, and other notes. This comprehensive view of prospects and customers is not possible with less robust, no-cost tools. Sage ACT! also offers notes about each customer or prospect—functionality not offered by web-based email or calendar applications. Sage ACT! Connect will sync updated notes and history to your mobile devices. Sage ACT! Connect also provides social media integration features such as Facebook® photos that are not available in most web-based email services¹⁵.

Productivity tools that provide consistent information for mobile and on-site employees can save an organization up to \$10,000 per mobile employee, per year, in lost productivity costs.

—Fonality/Webtorials State-of-the-Market 2011 Report:
Mobility Trends in SMBs

If you're already using Sage ACT!, conducting business in the field with Google tools would mean that you needed to rekey data when you got back to your office. If you currently use Gmail and Google Calendar™ and Contacts, Sage ACT! 2012 integrates with these tools so that you can send an email from Gmail and have it recorded in your Sage ACT! history, or access your Sage ACT! activities on your Google calendar. It's the best of both worlds!

Some business owners and sales representatives might be tempted to use no-cost, web-based email services such as Google® Gmail® and Yahoo!® Mail to keep track of contacts and activities when they are on the road. These solutions do not offer a true and complete Contact and Customer Management solution.

¹⁵ Facebook pictures viewable from the Sage ACT! Connect website only.

Conclusion

Sage ACT! Connect helps you take your office wherever you go by storing your contact information and calendar in the Cloud. With access to Sage ACT! from virtually anywhere, this subscription-based service delivers updates to contacts and calendars through your smartphone or tablet¹⁶, including iPhone and iPad. The flexibility afforded by Sage ACT! Connect lets you work the way you need to work—taking advantage of the best technologies for your job. With Sage ACT! Connect, you may feel like you're working at the speed of light!

Customers rave about Sage ACT! Connect:

"[Sage ACT! Connect] saved me hours of work transferring data."

"WOW so easy. [Sage ACT! Connect] is so awesome!"

"I am so excited about this new [Sage ACT! Connect] feature that I would want to buy this software just for this feature alone."

—Sage ACT! 2012 Beta Participants*

*Customer is a participant in the Sage ACT! 2012 Beta Program and may be eligible for participation-based incentives.

¹⁶ Review Sage ACT! Connect system requirements at www.act.com/connectsystemreq to confirm supported mobile phones, tablets, and web browsers.

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About Sage ACT!

Sage ACT! is the #1 Contact and Customer Management choice of small businesses and sales teams designed to help you build the long-lasting, profitable relationships your business thrives on. With Sage ACT!, it's easy to manage anything and everything related to your contacts and calendar. Think of it like your business' command center that serves up relevant relationship details and also connects you to powerful, subscription-based sales and marketing services, desktop and web-based productivity tools, and social media. Unlike other solutions that claim to get results, you can actually accomplish more, faster, by simply choosing to use Sage ACT!.

Important Notes: The mobile component of Sage ACT! Connect requires Internet connectivity. You are responsible for all data-related charges to your device. To facilitate mobile setup, Sage ACT! Connect sends a text message to your mobile phone. Based on your wireless plan, you may receive an extra charge from your carrier for this text message. Review Sage ACT! system requirements at www.act.com/systreq. You must purchase one license of Sage ACT! per user. Scalability varies based on hardware, size, and usage of your database. Visit www.ActSolutions.com or contact your add-on product provider to determine compatibility for your add-on products.

*Sage ACT! Certified Consultants are third-party vendors. Sage and its affiliates are in no way liable or responsible for claims made related to the services provided by third-party vendors.

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