

## Sage ACT! | Customer Success



### Challenge:

Access activities and key contact data while in the field— including notes, history, and property details— and make updates to contact details immediately— without having to lug around a laptop.

### Solution:

Sage ACT! Connect\* provides mobile access to Sage ACT!, with the ability to update contact details, review notes, history, and activities using the convenience and portability of a mobile device, like their iPad®¹.

### Result:

Patrick Henry Properties² now stays connected and is fully prepared for client meetings from anywhere, updating contact details on-the-fly that are quickly synced back to the Sage ACT! database.

### Customer:

Patrick Henry Properties

### Industry:

Commercial Real Estate

### Location:

Houston, TX

### System:

Sage ACT!

Sage ACT! Connect\*

## Patrick Henry Properties Takes the Office On The Road With Sage ACT! Connect\*

Patrick Henry Properties is a commercial real estate firm operating out of Houston, TX for over 10 years. Primarily specializing in investment properties, industrial properties, and land, they maintain a competitive advantage by providing their clients with detailed analysis to support informed buying and selling decisions. While maintaining focus on the objectives of the client, the firm does extensive research and gleans the right information to offer the critical analysis that is crucial to making sound real estate investments.

Patrick Wolford, Principal of the firm, has been using Sage ACT! for over 20 years. “I keep virtually all contacts in Sage ACT! including clients, prospects, vendors, and other brokers, all with detailed notes. One of the beauties of Sage ACT! is that you can segment different types of contacts, so it’s all in one database.”

Wolford had never used any other Contact and Customer Manager, and felt that using a product like Microsoft® Outlook® was “no comparison” with Sage ACT!. However, spending over 60% of his time in the field visiting clients, Wolford needed a mobile solution. Having grown to rely on his iPad¹ more and more, Sage ACT! Connect\* came along just in time.

### Convenient and Portable Solution Increases Productivity in the Field

Wolford enjoys the quick access to view and update information with Sage ACT! Connect\*. He says, “I connect from my iPad¹ and I love the speed. I like accessing Sage ACT! contact details from anywhere, and I can make changes on-the-fly. Yesterday I needed to update a phone number; I just did it right then and there. The beauty is when I get back to the office, everything is updated.”

He adds, “I love the information I can have at my fingertips. Notes and history is all right there for me to access. I am out in the field most of the day. I bring my iPad¹ and leave my laptop in the office. I don’t have to lug it around any longer and have quick access to information using Sage ACT! Connect\*.”

## Organized and Accessible Contact Details Support Targeted Communications and Help Build Rapport

Sage ACT! is vital to the success of Patrick Henry Properties, making client communications more effective. Wolford says, "Sage ACT! stays open all the time; I am constantly using it." With all contacts kept in Sage ACT! and segmented by type, Wolford sends targeted communications and likes seeing the communication history on his mobile device. He also set up a specific sync group, so only the most critical contacts are synced to Sage ACT! Connect\*.

With all notes and history kept in Sage ACT!, and easily retrievable from the iPad<sup>1</sup>, Wolford is able to build better relationships. He says, "Knowing what has been discussed in the past is key. I keep information on assistants, the type of company, what they do, all details that I can reference from my iPad<sup>1</sup> during a conversation— this helps build rapport."

"I connect from my iPad<sup>1</sup> and I love the speed. I like accessing Sage ACT! contact details from anywhere, and I can make changes on-the-fly."

— Patrick Wolford, Principal  
Patrick Henry Properties

## Calendar Access On-the-Move Equals Razor-Sharp Focus

Another feature of Sage ACT! that Wolford has come to rely on is managing his follow-ups with activities and reminders. Now with Sage ACT! Connect\*, Wolford can keep track of his schedule no matter where he is, all from his mobile device.

Wolford says, "I can schedule meetings with a contact in Sage ACT! and then view my calendar right from my iPad<sup>1</sup>. I can see all my appointments from anywhere and reschedule them on-the-fly."

Sage ACT! and Sage ACT! Connect\* have enabled Patrick Henry Properties to access and update key contact details and manage schedules from anywhere, providing a true mobile experience. Wolford says it best: "I look at myself as a mobile office; I don't want to be tied to a computer to have all of my information."

---

### About Sage ACT!

Sage ACT! makes it easy for you to have meaningful conversations with customers by giving you an organized view of the people you do business with. Like the millions of individuals in small businesses and sales teams who use Sage ACT!, you'll always be prepared with recent emails, meeting notes, task reminders, and social media profiles, because all of these details live in one place. You can even use Sage ACT! like a sales and marketing assistant to get the right leads, send striking marketing campaigns, and track your overall performance. The bottom line, Sage ACT! takes care of the administrative stuff so you can focus on building long-lasting, profitable business relationships.

### About Sage North America

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. Sage North America employs 4,000 people and supports 3.1 million small and mid-sized business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 13,100 people and supports 6.2 million customers worldwide.

### Important Notes:

For Sage ACT! Connect: 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. For Sage ACT!: Review Sage ACT! system requirements at [www.act.com/systreq](http://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](http://www.ActSolutions.com) or contact your add-on product provider to determine compatibility for your add-on products.

\*Requires additional subscription

<sup>1</sup> Review Sage ACT! Connect system requirements at [www.act.com/connectsystreq](http://www.act.com/connectsystreq) to confirm supported mobile phones, tablets, and web browsers.

<sup>2</sup> Customer is a participant in the Sage ACT! 2012 Beta Program and may be eligible for participation-based incentives.