

Sage ACT! | Customer Success



Challenge:

Recall customer information quickly— like contact names, phone numbers, email addresses, and locations— without having to take a laptop on field calls.

Solution:

Sage ACT! Connect* syncs information stored in Sage ACT!, such as contact details, notes, and history to a mobile device— like the iPad®¹— keeping customer information at their fingertips.

Result:

Now Tom Boris Associates² can pull up any contact record from the road, grab the address, make a quick call, or shoot off an email, all from the convenience of a mobile device¹.

Customer:

Tom Boris Associates

Industry:

Advertising

Location:

Orange County, CA

System:

Sage ACT!

Sage ACT! Connect*

Tom Boris Associates Goes Mobile— Keeping Contact Details Just a Touch Away

Tom Boris Associates is an advertising firm for technology companies who make specialized equipment in industries such as computing, aircraft, automotive, and energy. Providing their clients a unique opportunity to reach a high number of qualified readers, such as design engineers and manufacturing managers through an exclusive circulation, NASA Tech Briefs boasts the distinction of being an official publication of NASA.

Tom Boris, owner of the firm, has used Sage ACT! for over 20 years, and has relied on it to track prospects, contact details, and to segment and target clients for letters and promotions. Boris adds, “I use a lot of templates; I can just click on an order template, which is auto-filled, and I just have to print it, sign it and send it off. This cuts a lot of time.” But when traveling or going to trade shows, Boris wanted quicker access to information, without having to carry a laptop. Sage ACT! Connect* was the perfect solution.

Quick Access to Appointments and Contact Details Takes the Guess-Work Out of Field Calls

When traveling to visit a client, Boris uses Sage ACT! Connect* to keep him on schedule with the convenience and portability of his iPad¹. Boris says, “Now that I have the iPad¹, I make an appointment in Sage ACT!, and sync it with Sage ACT! Connect*. I don’t have to take a laptop with me anymore on field calls.” Sage ACT! Connect* also helps him get there: “If I’m driving somewhere and I need the address, I can quickly look this up in Sage ACT! Connect* and put it in my GPS. It’s so quick and easy.”

Boris uses Sage ACT! Connect* to retrieve phone numbers, contact names, and other details that help keep him at the top of his game. He describes, “At a trade show I might realize I need to see a particular customer; I can quickly find them in Sage ACT! Connect* and know who the contact person is before approaching them — all without having to bring a laptop.”

Updating Information and Sending Email On-the-Fly Enhances Productivity

Boris enjoys the ability to access his Sage ACT! contacts from anywhere, right on his iPad¹. “One of the best benefits is updating information on-the-fly,” says Boris. “I am on the road several days each month and I can make updates that are synced back to Sage ACT! the next time I’m in the office.”

He also frequently sends emails from his mobile device. “I can go to Sage ACT! Connect* anytime, find an email address quickly and send an email from my iPad¹. I have access to information I don’t have to go searching for; it’s right there.” With notes and history also within reach, Boris can keep in touch from anywhere.

Having a Remote Data Back-up Creates Peace of Mind

A unique feature of Sage ACT! Connect* that Boris really likes is that it keeps a remote back-up of all contact data. Boris describes, “When I’m gone for a long time I shut my computer down. If something were to happen to the computer, I can still access all the data on my iPad¹, or if my iPad¹ were to be stolen I can access it on the computer.” This redundancy helps Boris rest easier at night, knowing his data is safer.

Sage ACT! Connect* has provided Tom Boris Associates with the much needed convenience of quick access to information, without having to carry a laptop. Boris sums it up: “Now I have all the conveniences of quick information, and I never forget somebody’s name.”

“Now that I have the iPad¹, I make an appointment in Sage ACT!, and sync it with Sage ACT! Connect*. I don’t have to take a laptop with me anymore on field calls.”

— Tom Boris, Owner
Tom Boris Associates

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 midsized 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. 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.

*Requires additional subscription

¹ Review Sage ACT! Connect system requirements at www.act.com/connectsystreq to confirm supported mobile phones, tablets, and web browsers.

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