

Quick Start Guide To:

The Swiftpage for ACT! Snapshot Tool: The Call List Window

To access your Call Lists in ACT!, first click on the Snapshot tab in the Contacts view in ACT!. Then, click on the Call List tab and the Call List features will be shown:

Options	D Scor 10	е: О но	от
lan D			
877-2	oescher 228-8377		
Sends: 1 Op	pens: 1	Clicks:	3
Actions:			Edit

- The dropdown list at the top will allow you to switch between any Call List you have created.
- The arrows (showing 1 of 1 in the example above) allow you switch between different contacts in the selected Call List. When you switch between contacts, the contact detail information in ACT! changes correspondingly.
- The score and ranking (Hot, Warm or Mild) will be shown, along with the contact's name, phone number and how they interacted with the email (i.e. number of sends, opens and clicks).
- The Actions bar allows you to change the Action for that contact. Click on Edit to pull up the Action dialogue box, and then either choose an Action from the list or type in your own. Select the checkboxes if you wish to Save the Action in History or Schedule Activity (these relate to ACT! functions). Then click OK.

S Edit Action	
Select an action from the drop do or enter your own.	own list
Called	~
Save Action in History	
Schedule Activity	
OK Cano	el

- The four buttons at the bottom allow you to do the following functions:
 - Help: receive Help on the Call List window in Snapshot
 - Lookup: create an ACT! lookup based on how your contacts are ranked in the Call List:

S Create Look Up or Group 🛛 🛛 🔀
Use these filters to create a Lookup or Group of the contacts in your Full Call List
Rank:
and
Action: 💿 Both Action and No Action
Only Contacts that DO NOT have an Action
Only Contacts that have an Action
Include Contacts that were sent Swiftpage Email from another database.
Include contacts even if I am not the record manager.
Lookup Group Lookup Off Cancel

- o Update: update the Call List using the online Call List Dashboard
- o Online Call List: launch the online Call List dashboard to create, edit or update Call Lists