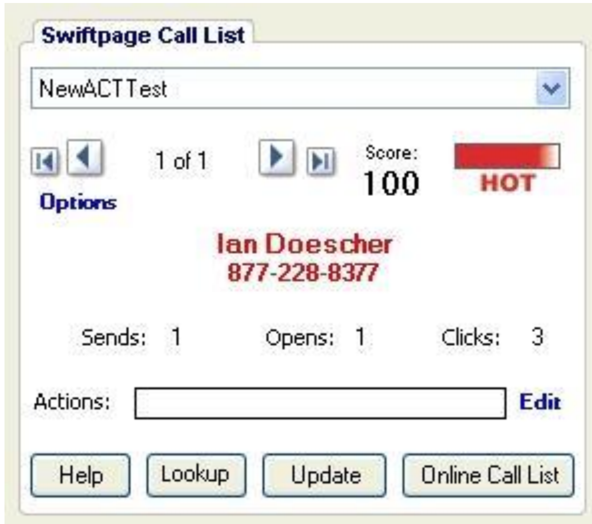
Swiftpage E

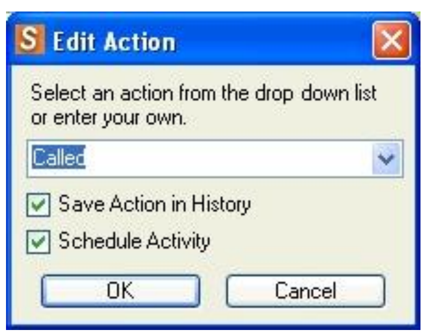
Quick Start Guide To:

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

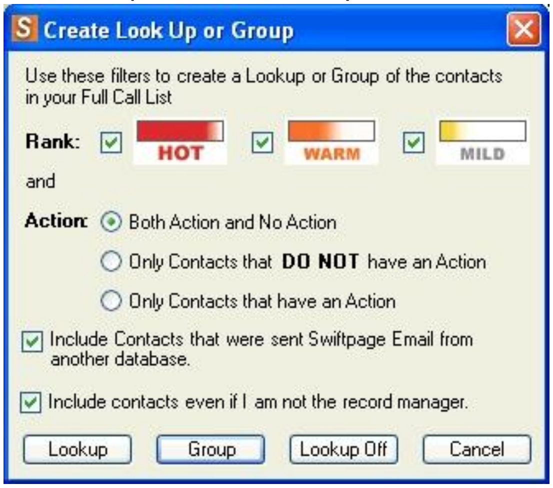
To access your Call Lists in ACT!, first click on the Snapshot tab in the Contacts view in ACT!. Then, click on the Call List tab and the Call List features will be shown:



- 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.



- 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:



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