Quick Start Guide To:

The Swiftpage for ACT! Snapshot Tool: The Contact Summary and Notes Window

The Contact Summary and Notes window in Snapshot syncs several ACT! features for a particular contact into one screen. To access the Contact Summary and Notes window in ACT!, first click on the Snapshot tab in the Contacts view in ACT!. Then, click on the Summary tab, and the Contact Summary and Notes features will be shown:

- The Next Activity shows you the most recent ACT! Activity for the contact, and allows you to edit that Activity or add a new one.
- The Last History field shows you the most recent ACT! History note for the contact and allows you to add a new History note.
- The Last Note field shows you the most recent Note for the contact, and allows you to edit that Note or add a new one.
- The Opportunity field shows you the most recent ACT! Opportunity for the contact and allows you to create a new one.
- The Stage field shows you the ACT! Stage that the contact is in and allows you to edit the stage.

To create new Activities, History notes, Notes or Opportunities, or to edit Activities, Notes or Stages, simply click on the Blue “New” or “Edit” button next to the corresponding field. (You can also make changes through the corresponding ACT! tabs, which will then be reflected on the Contact Summary and Notes window.)