Swiftpage E

Quick Start Guide To:

The Swiftpage for ACT! Snapshot Tool: The Contact Rank and Fields Window

The Contact Rank and Fields window in Snapshot syncs several ACT! features for a particular contact into one view, and also allows you to adjust contacts' rank on the fly, depending on what interactions you have with them. To access the Contact Rank and Fields window in ACT!, first click on the Snapshot tab in the Contacts view in ACT!. Then, click on the Rank & Fields tab, and the Contact Rank and Fields features will be shown:

- The Contact Rank arrow can be adjusted manually (by clicking and dragging) to adjust a contact's rank. For instance, if a contact scores low on a Call List, you might rank them as a C (low), but if after speaking with them it turns out they are actually very interested so you could slide them up as appropriate. When you are finished, you can click on Lookup to create an ACT! Lookup of contacts by their grade (A, B or C).
- The fields shown below the Rank give you a quick look at some of your contacts' information. Click on the Change Fields button to select which fields are shown—essentially any ACT! contact field can be shown in this window. Click the Lookup button to perform a lookup on that field or click Edit to change fields.