

Associating a Record to an Activity

When an email or phone number (calls and SMS) is an exact match to one record in AMPED, the activity will automatically associate to the record. Note that you cannot associate multiple records to inbound calls or SMS messages.

Showing 1 - 4 of 4		Page 1							
<input type="checkbox"/>	Start Time	Subject	Description	Recording	Phone	Duration	Associate With - Owner	Actions	
	August 28, 2020 10:40 AM - 10:41 AM	Called Jennifer	Called Jennifer to see about her availab...		+1 (267) 756-1100	17 S	Actions: Create Lead Create Contact Create Account		
	August 28, 2020 10:33 AM - 10:34 AM	CALL-OUT@ 10:33:52 AM	Called Alex. Need to follow up with her ...		12158069467	16 S	J		
	August 28, 2020 10:27 AM - 10:31 AM	CALL-IN@ 10:27:06 AM	Received a call from Jeff. He got back t...		+1 (215) 806-9467	5 S	J		
	August 28, 2020 10:26 AM - 10:31 AM	CALL-OUT@ 10:26:37 AM	Called Jeff. We discussed pricing. He ne...		(215) 806-9467	9 S	J		

If the email or phone number has more than one match, you will be prompted to select the record you wish to associate the activity to. Select the desired record and click the save icon to the right.

Email Records

Call Records

SMS Records

All

All

Matched

Unmatched

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Date/Time

To/From

Subject

Views

Associate With - Owner

Actions

Fri 08/28

ampedtrialstaging@gmail.com + 1 more

[EXTERNAL EMAIL]Time to Talk
Hi there,Do you have time to discuss this further ...

N/A

Select a record

Haley Smith (Leads) - Jerry Muse

Fri 08/28

ampedtrialstaging@gmail.com + 1 more

[EXTERNAL EMAIL]Following Up
Hi! I am following up per our conversation yesterda...

N/A

Alex Buchanon (Leads) - Jerry Muse

If the email or phone number does not match any record in AMPED, you can create a new Lead, Contact, or Account using the links shown below (or name the links – consistent with above see comments). The activity will automatically associate to this new record.

Showing 1 - 4 of 4		Page 1							
<input type="checkbox"/>	Start Time	Subject	Description	Recording	Phone	Duration	Associate With - Owner	Actions	
	August 28, 2020 10:40 AM - 10:41 AM	Called Jennifer	Called Jennifer to see about her availab...		+1 (267) 756-1100	17 S	Actions: Create Lead Create Contact Create Account		

If you need to associate more than one record to a record, click the "Plus" icon next to the associated records. This will allow you to add more records to be associated to the call, SMS, or email activity.

	Wed 08-26 03:32 PM	Alex Buchanon + 1 more	[EXTERNAL EMAIL]The files you asked for (3) Hi! I have attached the requested files for your vi...	N/A		
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If you have received multiple communications from the same customer, associating the customer to one of these communications will automatically associate the record to all communications.