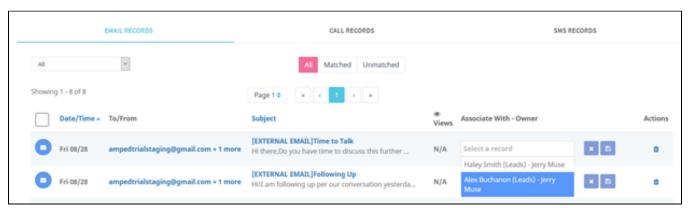
Associating a Record to an Activity

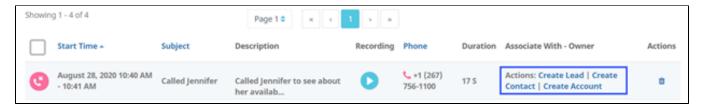
When an email or phone number (calls and SMS) is an exact match to one record in AMPED, the activity will automatically associate to the record. Note that you cannot associate multiple records to inbound calls or SMS messages.



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.



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.



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.



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.