

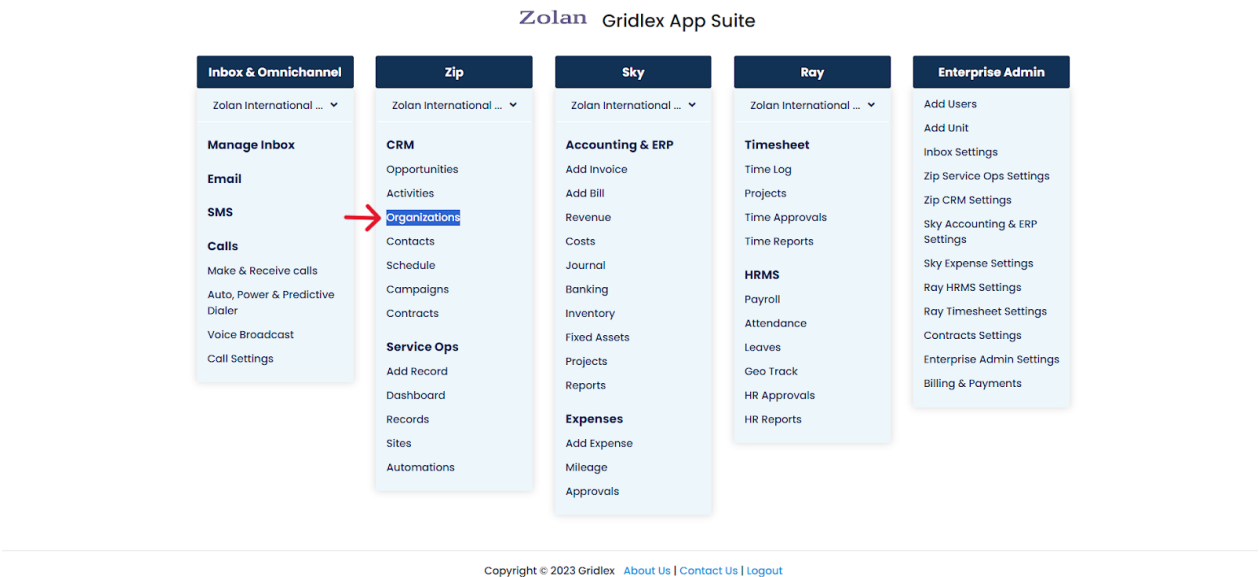
Adding a contact from the Organizations Page in a CRM system streamlines the process of contact management for businesses. This functionality ensures that the contact's details are directly associated with the correct organization, promoting accuracy and preventing potential mix-ups. Moreover, by linking contacts to their respective organizations, users can swiftly navigate relationships, track communication histories, and identify potential opportunities or pain points.

In Gridlex System, users have various methods to add contacts. This includes:

- 1. [Manually adding contacts.](#)
- 2. [Importing multiple contacts.](#)
- 3. Adding contacts directly from the organization page.

For this guide, we'll focus on adding contacts from the organization page. Follow the steps below:

Step 1: Log in to Gridlex App Suite and click on "Organizations" located under the Zip section in the navigation menu.



Step 2: Identify the organization where you'd like to add a contact and click on the edit icon adjacent to it.

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Map Organizations to Units

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Export to Excel

Organization ID	Organization	Affiliated Cont.	All Addresses	All Towns	All States	All Emails	All Phone Num.	All Website Lin.
116580988986883...	MEDICAL CENTER	Emma North	100 MADISON AVE	MORRISTOWN	New Jersey		+1-(973) 290-7010	
115067554920384...	True Health	Brandon Brown, Ruth Parker	463,Organization Main St 215,Cedarhurst Dr	Canton	Georgia(GA)		+1-6105930520 +1-7707047078 +1-5622270562 +1-7202689915	
115067554838168...	Zember Partners	Tom Sharp	6367 N,800th W 401,Wiley St	Canton	Georgia(GA)		+1-6622472429 +1-8128736867 +1-4108965976 +1-4047317137	
115067554745477...	General Systems	David Shaw	18410,Center St 529,Weldon Ln	Edgemont	Arkansas(AR)		+1-5107330984 +1-8709482488	
115067554655295...	United Resources	Meg Banks	9396,Cherry Tree Dr 7570,176th St	Mc Alpin	Florida(FL)		+1-389633779 +1-8653421838 +1-2035014278	
115067554571414...	Acme Inc	Sally Smith	223,Caldwell Rd 1163,Hyacinth St	Saint Augustine	Florida(FL)		+1-4233577941 +1-9049407703	
200000000000039...	John Doe Organization	John Doe, John Shore						
200000000000039...	Softland							
200000000000039...	Park Tree							

Step 3: After being redirected to the organization details page, find and click on the “Contacts” tab.

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TRUE HEALTH

Organization Name: True Health | Organization ID: 1150675549203849217 | Address: 215,Cedarhurst Dr

Feed

Opportunities

Activities

Profiles

Organization Affiliations

Contacts

Schedule

Emails

Records

No Feed Available for this Organization

Step 4: Within the "Contacts" tab, you can see all the contacts already linked to this organization. To add a new contact, simply click on the “Add New Contact to this Organization” button.

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TRUE HEALTH
Organization Name: True Health | Organization ID: 1150675549203849217 | Address: 215,Cedarhurst Dr

Feed Opportunities ▾ Activities ▾ Profiles ▾ Organization Affiliations **Contacts** Schedule ▾ Emails Records

Affiliated Contacts Add New Contact to this Organization Add Contact to this Organization from Gridlex Databases Affiliate Contacts to this Organization

Saved Views ▾ Save View Clear Filters Export to Excel

Contact ID	Contact Name	Affiliated Orga...	All Addresses	All Towns	All States	All Emails	All Phone Num...	All Website Lin...
120426672564713...	Brandon Brown	True Health						
115067554958962...	Ruth Parker	True Health	2724 116th St 520 Autumn Ave	Collinsville	Illinois(IL)		+1-7157260790 +1-6182238245	

1 - 2 of 2 items

Step 5: You'll be taken to a new tab where you can input the contact's details. Fill in essential information such as the contact's name, phone number, address, and any other required fields.

Once you've entered all the necessary details, finalize the process by clicking the “Submit” button.

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TRUE HEALTH
Organization Name: True Health | Organization ID: 1150675549203849217 | Address: 215,Cedarhurst Dr

Feed Opportunities ▾ Activities ▾ Profiles ▾ Organization Affiliations **Contacts** Schedule ▾ Emails Records

Affiliated Contacts **Add New Contact to this Organization** Add Contact to this Organization from Gridlex Databases Affiliate Contacts to this Organization

Add & Affiliate Contact to True Health

Basic Information

Contact Name First Name Middle Name Last Name
 Vanessa Jones Vanessa Jones
 Title Ms
 Visible to *
☒ Visible to all units ☐ Visible to selected units

Notes

Poppins - Medium 15 **B** *I* U ~~S~~ ^X _X

True Health Sales Rep

Submit

Your contact is now successfully added and associated with the chosen organization. This method saves time as it directly links the contact to a

specified organization, eliminating the need for manually associating contacts with organizations later on.

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TRUE HEALTH
Organization Name: True Health | Organization ID: 1150675549203849217 | Address: 215,Cedarhurst Dr

Feed Opportunities ▾ Activities ▾ Profiles ▾ Organization Affiliations **Contacts** Schedule ▾ Emails Records

Affiliated Contacts Add New Contact to this Organization Add Contact to this Organization from Gridlex Databases Affiliate Contacts to this Organization

Saved Views ▾ Save View Clear Filters Export to Excel

Contact ID	Contact Name	Affiliated Orga...	All Addresses	All Towns	All States	All Emails	Remove Affilia...	All Phone Num...
120428898700369...	Vanessa Jones	True Health	463,Organization Main St				remove	
120426672564713...	Brandon Brown	True Health					remove	
115067554958962...	Ruth Parker	True Health	2724 116th St 520 Autumn Ave	Collinsville	Illinois(IL)		remove	+1-7157260790 +1-6182238245

1 - 3 of 3 items

If you need any help with any feature, data migration of your old data, or anything at all, just email apps@gridlex.com and our team will be here to help you. Remember, that one of **Gridlex's** core values is Customer Success. We want you to be successful.