

In Gridlex Zip CRM, affiliating organizations to contacts helps track business relationships and streamline communication. This tutorial will guide you through this efficient process, enhancing your networking and data management.

Step 1: Log in to the Gridlex App Suite and click on 'Contacts' located under the Zip section.

Step 2: Browse through the contact list to find the contact you wish to edit. Click on the pencil or 'edit' icon located next to the contact's name.

Note: The availability of this feature depends on your assigned permissions. If you don't have the permission to view or add contacts, you'll be unable to do so. To obtain access, please reach out to your enterprise admin.

Step 3: Click 'Organizations' on the contact page.

Step 4: On this page, you can see the organizations already affiliated with the contact. Click 'Affiliate Organizations to this Contact.'

Step 5: Browse through the organizations list to find the organization you wish to affiliate to the contact. Click 'Assign' to affiliate an organization to the contact.

The 'Transfer' button lets you remove all the current contact affiliations from that organization and only affiliate the selected contact.

You can view all the Organizations affiliated with the contact on the 'Affiliated Organizations' tab.

You have now successfully affiliated organizations to a contact in Gridlex Zip.

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.