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.

Inbox & Omnichannel	Zip	Sky	Ray	Enterprise Admin
Zolan International 💙	Zolan International 👻	Zolan International 💙	Zolan International 👻	Add Users Add Unit
Manage Inbox Email SMS Calls Make & Receive calls Auto, Power & Predictive Joler Voice Broadcast Call Settings	CRM Opportunities Activities Organizations Contracts Campaigns Contracts Service Ops Add Record Dashboard Records Sites Automations	Accounting & ERP Add Invoice Add Bill Revenue Costs Journal Banking Inventory Fixed Assets Projects Reports Expenses Add Expense Mileage Approvals	Timesheet Time Log Projects Time Approvals Time Reports HRMS Payroll Attendance Leaves Geo Track HR Approvals HR Reports	Inbox Settings Zip Service Ops Settings Zip CRM Settings Sky Accounting & ERP Settings Sky Expense Settings Ray HRMS Settings Contracts Settings Enterprise Admin Setting Billing & Payments

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.

GRIDLEX	Inbox 🗸 Zip Service Ops 🗸 Zip CRM 🗸 Sky Accounting & ERP 🗸 Sky Expenses 🗸 Ray HRMS 🗸 Objects Settings 🗸 My Account 🗸												
Q Search	Contacts Add Co	Contacts Add Contacts From Gridlex Databases Add Contacts From Master Data Map Contacts to Units											
Inbox	Saved Views		✓ Save View	Clear Filters	Export to Excel		al () Predictive Dial						
🔄 Emails	Ourtrat ID 1	0	Affiliated Game		All Terries	1 All Charters	All Caralla		All Mahaita Lia				
💴 SMS	Contact ID :	Contact Name :	Affiliated Orga :	All Addresses :	All Towns	: All States	All Emails :	All Phone Num :	All Website Lin :				
📞 Calls	120431006255074	Dua 🗹						U -3896337795	1				
Auto Dialer	120431006216906	Shawn 🗹						L+1-4233577941					
Zip CRM	120429345641626	BARBARA JANE COVEN 📝	True Health	210 WESTCHESTER AVE, 210	WHITE PLAINS	NY		U -9146820731					
Opportunities		-		WESTCHESTER AVE									
- Activities	120428898700369	Vanessa Jones 🗹	True Health	463,Organization Main St					_				
Organizations >	1204281994327158	JOHN F MOORE 📝		740 EAST STATE ST, 740 EAST STATE ST	SHARON	PA		⊠ -7249833911					
Schedule	1204273187010203	Brandon Brown 📝	Vader Life Sciences										
┥ Campaigns	120426672564713	Brandon Brown 🗹	True Health										
Contracts	10 41315 000 53300	Nihal Mohammed					nih el O svidlev e est						
Zip Service Ops	1154131302033320	C					ninal@gnalex.com						
Dashboard	1194130557710458	Zolan Support 📝					support@zolan.gridl	e					
Records	1193760174230548	DAVID MICHAEL DEN BRABER		750 E BELTLINE AVE NE, 750 E BELTLINE	GRAND RAPIDS	МІ		E -6169492600					
🕞 Sites				AVE NE									
	1193732793197481	Ruby R. Little 📝					RubyRLittle@jourrap	8471-					

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

GRIDLEX	Inbox × Zip Service Ops × Zip CRM × Sky Accounting & ERP × Sky Expenses × Ray HRMS × Objects Settings × My Account ×	Zolan Zolan Interna V
Q Search	VANESSA JONES Organization : True Health	
Inbox	Vanessa Jones	
🖂 Emails	Feed Opportunities v Activities v Profile v Organizations Schedule v Emails Records	
SMS		
📞 Calls	Contact Attributes Form Plot Details General Details Contact Profile	
O Auto Dialer		
Zip CRM	Basic Information	Edit Add Name
Opportunities >		
Z Activities	Contact Name Contact Name Type *	
Organizations >	Vanessa Jones Display Name 🗸	
L Contacts	First Name Last Name	
🕔 Schedule	Vanessa Jones	
┥ Campaigns	Title	
Contracts >	Ms	
Zip Service Ops		
- Dashboard		
Necords	Notes	Edit
▶ Sites		
	Poppins-Medium • 15• A • B I U S X' X, B II II III III III IIII IIII IIIII IIIII IIIIIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	

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

GRIDLEX	Inbox - Zip Service (Inbox × Zip Service Ops × Zip CRM × Sky Accounting & ERP × Sky Expenses × Ray HRMS × Objects Settings × My Account ×												ma ~
Q Search	VANESSA JONE Organization : True	VANESSA JONES Organization : True Health												
Inbox	Vanessa Jones	Vanessa Jones												
🖂 Emails	Feed Opportunit	Feed Opportunities - Activities - Profile - Organizations Schedule - Emails Records												
SMS														
📞 Calls	Affiliated Organizations Add New Organization to this Contact Affiliate Organizations to this Contact													
O Auto Dialer	Saved Views			~	Save View	Clear Filters		Export to Excel						
Zip CRM	Organization ID	Organization	Affiliated Cont	All A	ddresses :	All Towns	:	All States		All Emails		All Phone Num	All Website Lin	
Opportunities >			BARBARA JANE									M +1-6105930520		^
Z Activities	115067554920384	True Health 📝	COVEN, Vanessa Jones, Brandon	COVEN, Vanessa Jones, Brandon Brown, Ruth Parker, (more)		Organization h St Canton G Cedarhurst Dr		Georgia(GA) □+1-7707047078				C+1-7707047078		1
Organizations >			Brown, Ruth Parker, (more)									+1-7202689915		1
Contacts >	4		(+
🕔 Schedule	ia a 1 > >i												1 - 1 of 1 it	ems
┥ Campaigns														
Contracts >														
Zip Service Ops														
Records														
🐂 Sites														

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.

GRIDLEX	Inbox - Zip Service	Inbox × Zip Service Ops × Zip CRM × Sky Accounting & ERP × Sky Expenses × Ray HRMS × Objects Settings × My Account ×											
Q Search	Feed Opportunit	Feed Opportunities - Activities - Profile - Organizations Schedule - Emails Records											
Inbox	Affiliated Organizations Add New Organization to this Contact Affiliate Organizations to this Contact												
🖂 Emails	Saved Views			Save \	View Clear Filters	Export to Excel							
📃 SMS	Organization ID	Organization	Affiliated Cont	All Addresses	: All Towns	: All States	1	All Emails :	All Phone Num	All Website Lin	Assign/Transfer		
Auto Dialer	119337905042569	StopGrey 🗹						OrvilleChnadonnet@		\rightarrow	Assign		
ZIP CRM	1193379049813323	Atlas Realty 🗭	Aubrey Labelle					AubreyLabelle@telev			Assign Transfer		
Opportunities > Activities	110227004994024	First Choice	Musette					MusetteCompagnon					
Organizations >	110007004004024	Maintenance 🗷	Compagnon		musettecompugnon			Assign					
Contacts >	119337904759453_	Prestigabiz 🗹	Travers Leroy					TraversLeroy@jourra			Assign Transfer		
Schedule Compaigns	119337904634463	Oranges Records & Tapes 📝	Royale Archambault					RoyaleArchambault			Assign Transfer		
Contracts	119337904540091	Sounds of Soul Records & Tapes	Janet J. Lee					JanetJLee@jourrapid			Assign Transfer		
Dashboard	119337904478435	MaryEShank@telewo	Mary E. Shank								Assign Transfer		
 Records Sites 	119337904382805	Wherehouse Music	Cornelia R. Villalta					CorneliaRVillalta@do			Assign Transfer		
	1193379043177934	Asian Answers 😰	Lori J. Pearson					LoriJPearson@dayre			Assign Transfer		
	119337904233907	Stratapro 🗭	Charles I. Harman					Charles/Harman@jo			Assign Transfer		
	<	1 of1 ≻ H									1 - 31 of 31 items		

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

GRIDLEX	Inbox × Zip Service Ops × Zip CRM × Sky Accounting & ERP × Sky Expenses × Ray HRMS × Objects Settings × My Account ×													
Q Search	VANESSA JONE Organization : True Vanessa Jones	VANESSA JONES Organization : True Health Vanessa Jones												
🖂 Emails	Feed Opportunit	Feed Opportunities v Activities v Profile v Organizations Schedule v Emails Records												
💴 SMS														
📞 Calls	Affiliated Organizations Add New Organization to this Contact Affiliate Organizations to this Contact													
Auto Dialer	Saved Views			∽ Save View	Clear Filters	Export to Excel								
ZIP CRM	Organization ID	Organization	Affiliated Cont	All Addresses	All Towns	All States	All Emails	All Phone Num	All Website Lin	Assign/Transfer				
Opportunities >										<u> </u>				
Activities	118688205549426	Sciences 🖉	Brandon Brown	12 Jedi Way	Mos Espa	Louisiana	reach@vader.com	E +1-2015556464	vaderhealth.com	Assign Transfer				
 Organizations > Contacts > Schedule 	116580988986883	MORRISTOWN MEDICAL CENTER	David Shaw, Emma North	100 MADISON AVE	MORRISTOWN	New Jersey		■+1-(973) 971- 5000 ■+1-(973) 290- 7010		Assign Transfer				
Campaigns Contracts	115067554838168	Zember Partners	Tom Sharp	6367 N,800th W 401,Wiley St	Canton	Georgia(GA)		C+1-6622472429 C+1-8128736867 C+1-4108965976 C+1-4047317137		Assign Transfer				
Zip Service Ops	1150675547454771	General Systems	David Shaw	18410,Center St 529,Weldon Ln	Edgemont	Arkansas(AR)		■+1-5107330984 ■+1-8709482488		Assign Transfer				
 Records Sites 	115067554655295	United Resources	Meg Banks	9396,Cherry Tree Dr 7570,176th St	Mc Alpin	Florida(FL)		 ■+1-389633779 ■+1-8653421838 ■+1-2035014278 		Assign Transfer				
	1150675545714114_	Acme Inc 🖻	Sally Smith	223,Caldwell Rd 1163,Hyacinth St	Saint Augustine	Florida(FL)		■+1-4233577941 ■+1-9049407703		Assign Transfer				
	2000000000039	John Doe Organization 🖻	John Doe, John Shore							Assign Transfer				

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

GRIDLEX	Inbox - Zip Service C	Inbox × Zip Service Ops × Zip CRM × Sky Accounting & ERP × Sky Expenses × Ray HRMS × Objects Settings × My Account ×											ι α Υ
Q Search	VANESSA JONES Organizations : Tru Vanessa Jones	VANESSA JONES Organizations : True Health StopGrey Vader Life Sciences Vanessa Jones											
Emails EsMS Colls	Feed Opportunitie	Feed Opportunities Activities Profile Organizations Schedule Emails Records Affiliated Organizations Add New Organization to this Contact Affiliate Organizations to this Contact Affiliate Organizations Add New Organization to this Contact											
Auto Dialer	Saved Views		```	Save View	Clear Filters	Expo	t to Excel						
ZIP CRM	Organization ID	Organization N	Affiliated Conta	All Addresses	All Towns	1	All States	:	All Emails :	All Phone Num	All Website Links	Remove Affiliati	
Activities	1193379050425692	StopGrey 📝	Vanessa Jones						OrvilleChnadonnet@r			remove	^
Organizations >	1186882055494262	Vader Life Sciences		12 Jedi Way	Mos Espa		Louisiana		reach@vader.com	U +1-2015556464	vaderhealth.com	remove	
Contacts			BARBARA JANE	463 Organization						+1-6105930520			
Campaigns	1150675549203849	True Health 🗷	Jones, Brandon Brown, Ruth Parker,	Main St 215,Cedarhurst Dr	Canton		Georgia(GA)			+1-7707047078 +1-5622270562 +1-7202689915		remove	
Contracts > Zip Service Ops	ia i 1 ≻ H		(more)									1 - 3 of 3 item	ns
Dashboard													
Records													
hr Sites													

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 <u>apps@gridlex.com</u> 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.