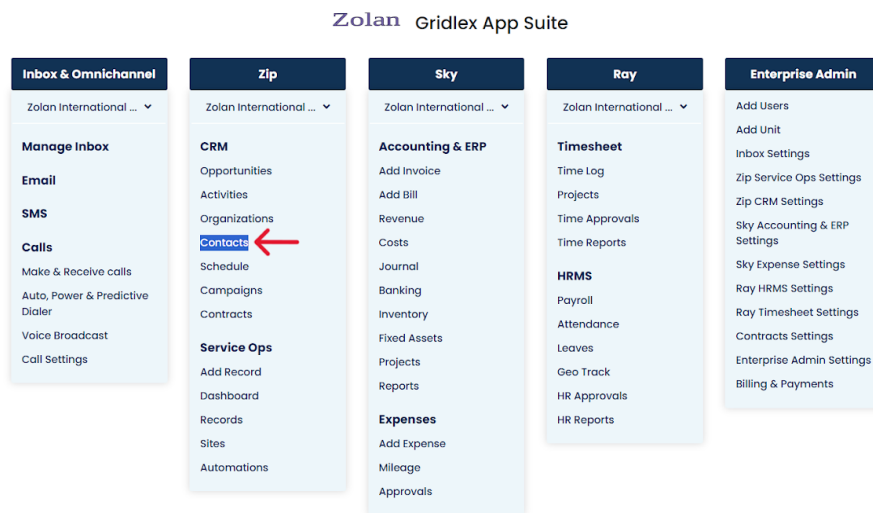


In Gridlex Zip CRM, affiliating organizations to contacts helps track business relationships and streamline communication. This tutorial will guide you through this efficient process, enhancing your networking and data management.

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



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**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

Zolan

Zolan Interna...

Q Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Zip Service Ops

Dashboard

Records

Sites

Contacts

Add Contacts

Add Contact From Gridlex Databases

Add Contacts From Master Data

Map Contacts to Units

Saved Views

Save View

Clear Filters

Export to Excel

Power Dial

Predictive Dial

Contact ID	Contact Name	Affiliated Orga...	All Addresses	All Towns	All States	All Emails	All Phone Num...	All Website Lin...
120431006255074...	Dua						3896337795	
120431006216906...	Shawn						+1-4233577941	
120429345641626...	BARBARA JANE COVEN	True Health	210 WESTCHESTER AVE, 210 WESTCHESTER AVE	WHITE PLAINS	NY		9146820731	
120428898700359...	Vanessa Jones	True Health	463,Organization Main St					
1204281994327158...	JOHN F MOORE		740 EAST STATE ST, 740 EAST STATE ST	SHARON	PA		7249833911	
1204273187010203...	Brandon Brown	Vader Life Sciences						
120426672564713...	Brandon Brown	True Health						
1194131562053320...	Nihal Mohammed					nihal@gridlex.com		
1194130557710458...	Zolan Support					support@zolan.gridk		
1193760174230548...	DAVID MICHAEL DEN BRABER		750 E BELTLINE AVE NE, 750 E BELTLINE AVE NE	GRAND RAPIDS	MI		6169492600	
1193732793197481...	Ruby R. Little					RubyRLittle@jourapl	+1-267-291-8471-	

**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...

Q Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Zip Service Ops

Dashboard

Records

Sites

VANESSA JONES

Organization : True Health

Vanessa Jones

Feed

Opportunities

Activities

Profile

Organizations

Schedule

Emails

Records

Contact Attributes Form

Plot Details

General Details

Contact Profile

Basic Information

Edit

Add Name

Contact Name

Vanessa Jones

Contact Name Type

Display Name

First Name

Vanessa

Middle Name

Last Name

Jones

Title

Ms

Notes

Edit

Poppins-Medium

15

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B

I

U

S

X


X

**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 Ops ▾ Zip CRM ▾ Sky Accounting & ERP ▾ Sky Expenses ▾ Ray HRMS ▾ Objects ▾ Settings ▾ My Account ▾ Zolan  
Zolan Interna... ▾

**VANESSA JONES**  
Organization : [True Health](#)  
Vanessa Jones

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**Affiliated Organizations** Add New Organization to this Contact [Affiliate Organizations to this Contact](#) 

Saved Views ▾ Save View Clear Filters Export to Excel

Organization ID	Organization ...	Affiliated Cont...	All Addresses	All Towns	All States	All Emails	All Phone Num...	All Website Lin...
115067554920384...	<a href="#">True Health</a> 	<a href="#">BARBARA JANE COVEN, Vanessa Jones, Brandon Brown, Ruth Parker, (more)</a>	483,Organization Main St   215,Cedarhurst Dr	Canton	Georgia(GA)		+1-6105930520 +1-7707047078 +1-5622270562 +1-7202689915	

1 - 1 of 1 items












**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 Ops ▾ Zip CRM ▾ Sky Accounting & ERP ▾ Sky Expenses ▾ Ray HRMS ▾ Objects ▾ Settings ▾ My Account ▾ Zolan  
Zolan Interna... ▾

Feed Opportunities ▾ Activities ▾ Profile ▾ **Organizations** Schedule ▾ Emails Records

**Affiliated Organizations** Add New Organization to this Contact [Affiliate Organizations to this Contact](#)

Saved Views ▾ Save View Clear Filters Export to Excel

Organization ID	Organization ...	Affiliated Cont...	All Addresses	All Towns	All States	All Emails	All Phone Num...	All Website Lin...	Assign/Transfer
119337905042569...	<a href="#">StopGrey</a> 					<a href="#">OrvilleChnadonnet@</a>			 <a href="#">Assign</a>
1193379049813323...	<a href="#">Atlas Realty</a> 	<a href="#">Aubrey Labelle</a>				<a href="#">AubreyLabelle@tele</a>			<a href="#">Assign</a> <a href="#">Transfer</a>
119337904884024...	<a href="#">First Choice Garden Maintenance</a> 	<a href="#">Musette Compagnon</a>				<a href="#">MusetteCompagnon</a>			<a href="#">Assign</a> <a href="#">Transfer</a>
119337904759453...	<a href="#">Prestigabiz</a> 	<a href="#">Travers Leroy</a>				<a href="#">TraversLeroy@joura</a>			<a href="#">Assign</a> <a href="#">Transfer</a>
119337904634463...	<a href="#">Oranges Records &amp; Tapes</a> 	<a href="#">Royale Archambault</a>				<a href="#">RoyaleArchambault</a>			<a href="#">Assign</a> <a href="#">Transfer</a>
119337904540091...	<a href="#">Sounds of Soul Records &amp; Tapes</a> 	<a href="#">Janet J. Lee</a>				<a href="#">JanetJLee@jourapic</a>			<a href="#">Assign</a> <a href="#">Transfer</a>
119337904478435...	<a href="#">MaryEShank@telewa</a> 	<a href="#">Mary E. Shank</a>							<a href="#">Assign</a> <a href="#">Transfer</a>
119337904382805...	<a href="#">Wherehouse Music</a> 	<a href="#">Cornelia R. Villalta</a>				<a href="#">CorneliaRVillalta@dc</a>			<a href="#">Assign</a> <a href="#">Transfer</a>
119337904317934...	<a href="#">Asian Answers</a> 	<a href="#">Lori J. Pearson</a>				<a href="#">LoriJPearson@dayre</a>			<a href="#">Assign</a> <a href="#">Transfer</a>
119337904233907...	<a href="#">Stratapro</a> 	<a href="#">Charles I. Harman</a>				<a href="#">CharlesHarman@jo</a>			<a href="#">Assign</a> <a href="#">Transfer</a>

Page 1 of 1 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 Zolan Zolan Interna...

**VANESSA JONES**  
Organization: [True Health](#)  
Vanessa Jones

Feed Opportunities Activities Profile **Organizations** Schedule Emails Records

Affiliated Organizations Add New Organization to this Contact **Affiliate Organizations to this Contact**

Saved Views Save View Clear Filters Export to Excel

Organization ID	Organization	Affiliated Cont...	All Addresses	All Towns	All States	All Emails	All Phone Num...	All Website Lin...	Assign/Transfer
118688205549426...	<a href="#">Vader Life Sciences</a>	Brandon Brown	12 Jedi Way	Mos Espa	Louisiana	reach@vader.com	+1-2015556464	vaderhealth.com	Assign Transfer
116580988986883...	<a href="#">MORRISTOWN MEDICAL CENTER</a>	David Shaw, Emma North	100 MADISON AVE	MORRISTOWN	New Jersey		+1-(973) 971-5000 +1-(973) 290-7010		Assign Transfer
115067554838168...	<a href="#">Zember Partners</a>	Tom Sharp	6367 N.800th W   401,Wiley St	Canton	Georgia(GA)		+1-6622472429 +1-8128738867 +1-4108965976 +1-4047317137		Assign Transfer
115067554745477...	<a href="#">General Systems</a>	David Shaw	18410,Center St   529,Weldon Ln	Edgemont	Arkansas(AR)		+1-5107330984 +1-8709482488		Assign Transfer
115067554655295...	<a href="#">United Resources</a>	Meg Banks	9396,Cherry Tree Dr   7570,176th St	Mc Alpin	Florida(FL)		+1-389633779 +1-8653421838 +1-2035014278		Assign Transfer
115067554571414...	<a href="#">Acme Inc</a>	Sally Smith	223,Caldwell Rd   1163,Hyacinth St	Saint Augustine	Florida(FL)		+1-4233577941 +1-9049407703		Assign Transfer
20000000000039...	<a href="#">John Doe Organization</a>	John Doe, John Shore							Assign Transfer

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

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**VANESSA JONES**  
Organizations: [True Health](#) | [StopGrey](#) | [Vader Life Sciences](#)  
Vanessa Jones

Feed Opportunities Activities Profile **Organizations** Schedule Emails Records

**Affiliated Organizations** Add New Organization to this Contact Affiliate Organizations to this Contact

Saved Views Save View Clear Filters Export to Excel

Organization ID	Organization N...	Affiliated Conta...	All Addresses	All Towns	All States	All Emails	All Phone Num...	All Website Links	Remove Affiliat...
1193379050425692...	<a href="#">StopGrey</a>	Vanessa Jones				OrvilleChnadonnet@r			remove
1186882055494262...	<a href="#">Vader Life Sciences</a>		12 Jedi Way	Mos Espa	Louisiana	reach@vader.com	+1-2015556464	vaderhealth.com	remove
1150675549203849...	<a href="#">True Health</a>	BARBARA JANE COVEN, Vanessa Jones, Brandon Brown, Ruth Parker, (more)	463,Organization Main St   218,Cedarhurst Dr	Canton	Georgia(GA)		+1-6105930520 +1-7707047078 +1-5622270562 +1-7202689915		remove

1 - 3 of 3 items

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](mailto: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.