

Welcome to our comprehensive guide on adding affiliate contacts to organizations in Gridlex Zip.

Contacts are an essential part of any organization. With Gridlex, keeping track of connections becomes streamlined and efficient. Adding affiliate contacts to an organization ensures effective communication, optimal networking, and a clear view of your business ecosystem.

This tutorial will walk you through adding affiliate contacts to organizations in Gridlex Zip.

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

On the Organizations listing page, you can see which contacts are affiliated with organizations under the "Affiliated Contacts" column.

Step 2: Click on the Organization to which you want to add Affiliate Contacts.

Step 3: Click "Contacts" from the menu bar.

You can see all the contacts affiliated with the organization on this page. If you wish to remove the affiliation, click the "Remove" button under the "Remove Affiliation" column.

Step 4: Click "Affiliate Contacts to this Organization" on the menu bar.

How to Assign a Contact to the Organization?

Step 5: Click the “Assign” button under the “Assign/Transfer” column to affiliate the contact to the organization. This action does not remove the contact’s existing organization affiliations.

On the other hand, transferring affiliation releases all the current organization affiliations from that contact (See next step)

How to Transfer a Contact to the Organization?

Step 6: Click “Transfer” under the “Assign/Transfer” column. This action releases all the current organization affiliations from that contact.

Congratulations! You have learned how to add Affiliate Contacts to Organizations 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.