

Welcome to our comprehensive guide on adding activity from an organization page.

Every business interaction counts. Using the Activity feature in Gridlex Zip, you can seamlessly document, manage, and reference all pivotal touchpoints. From meetings to follow-ups, ensure everything runs smoothly.

This tutorial will walk you through adding activity from an organization page in Gridlex Zip.

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

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

Step 3: Hover over the "Activities" option on the menu bar and click "Add - Default Activity" from the dropdown.

Note: The options in the dropdown will depend on how many Activity Templates you have. You can select the template of your choice. We are using the "Default Activity" Template to demonstrate.

Step 4: Fill in the fields per your requirement.

Step 5: Once you are done, click "Add Activity."

Congratulations! You learned how to add activity from an organization page 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.