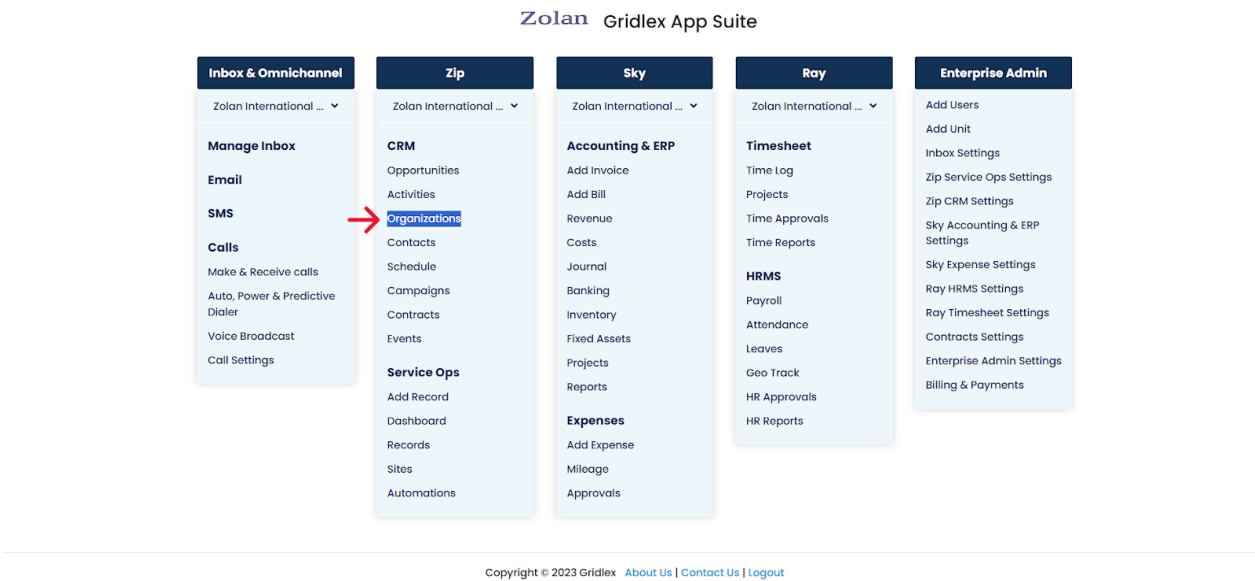


Welcome to our comprehensive guide on adding activity from an organization page.

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.

<div> <div>GRIDLEX</div> <div> <div>Inbox</div> <div>Zip Service Ops</div> <div>Zip CRM</div> <div>Sky Accounting & ERP</div> <div>Sky Expenses</div> <div>Ray HRMS</div> <div>Objects</div> <div>Settings</div> <div>My Account</div> </div> <div>Zolan</div> <div>Zolan Interna...</div> </div>									
<div> <div>Q Search</div> <div> <div>Inbox</div> <div>Emails</div> <div>SMS</div> <div>Calls</div> <div>Auto Dialer</div> <div>Zip CRM</div> <div>Opportunities</div> <div>Activities</div> <div>Organizations</div> <div>Contacts</div> <div>Schedule</div> <div>Campaigns</div> <div>Contracts</div> <div>Events</div> <div>Zip Service Ops</div> <div>Dashboard</div> <div>Records</div> </div> </div>									
<div> <div>Organizations</div> <div>Add Organizations</div> <div>Add Organizations From Master Data</div> <div>Map Organizations to Units</div> </div>									
<div> <div>Saved Views</div> <div>Save View</div> <div>Clear Filters</div> <div>Export to Excel</div> </div>									
Organization ID	Organization	Affiliated Contacts	All Addresses	All Towns	All States	All Emails	All Phone Num...	All Website Lin...	
118729793859938...	gridlexmail					marketingandsales@			
118729793384724...	google					forwarding-noreply@google.com			
118728463906958...	Test		H.no 4-256/2		US				
118688205549426...	Vader Life Sciences	Orville Chnadonnet	12 Jedi Way	Mos Espa	Louisiana	reach@vader.com	+1-2015556464	vaderhealth.cor	
116580988986883...	MORRISTOWN MEDICAL CENTER	David Shaw, Emma North	100 MADISON AVE	MORRISTOWN	New Jersey		+1-(973) 971-5000 +1-(973) 290-7010		
115067554920384...	True Health	BARBARA JANE COVEN, Vanessa Jones, Brandon Brown, Ruth Parker, (more)	463,Organization Main St 215,Cedarhurst Dr	Canton	Georgia(GA)		+1-6105930520 +1-7707047078 +1-5622270562 +1-7202689915		
115067554838168...	Zember Partners	Tom Sharp	6367 N.800th W 401,Wiley St	Canton	Georgia(GA)		+1-6622472429 +1-8128736867 +1-4108965976 +1-4047317137		
1150675547454771...	General Systems	David Shaw	18410.Center St 529,Weldon Ln	Edgemont	Arkansas(AR)		+1-5107330984 +1-8709482488		

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.

<div> <div>GRIDLEX</div> <div> <div>Inbox</div> <div>Zip Service Ops</div> <div>Zip CRM</div> <div>Sky Accounting & ERP</div> <div>Sky Expenses</div> <div>Ray HRMS</div> <div>Objects</div> <div>Settings</div> <div>My Account</div> </div> <div>Zolan</div> <div>Zolan Interna...</div> </div>									
<div> <div>Q Search</div> <div> <div>Inbox</div> <div>Emails</div> <div>SMS</div> <div>Calls</div> <div>Auto Dialer</div> <div>Zip CRM</div> <div>Opportunities</div> <div>Activities</div> <div>Organizations</div> <div>Contacts</div> <div>Schedule</div> <div>Campaigns</div> <div>Contracts</div> <div>Events</div> <div>Zip Service Ops</div> <div>Dashboard</div> <div>Records</div> </div> </div>									
<div> <div>TRUE HEALTH</div> <div>Organization Name: True Health Organization ID: 1150675549203849217 Address1: 215,Cedarhurst Dr</div> <div> <div>Feed</div> <div>Opportunities</div> <div>Activities</div> <div>Profiles</div> <div>Organization Affiliations</div> <div>Contacts</div> <div>Schedule</div> <div>Emails</div> <div>Records</div> </div> </div>									
<div> <div> <div>Activities List</div> <div>Activities Analytics</div> <div>Add - Default Activity</div> <div>Add - Record new activity</div> </div> <div>No Feed Available for this Organization</div> </div>									

Step 4: Fill in the fields per your requirement.

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

Q Search

TRUE HEALTH
Organization Name: True Health | Organization ID: 1150675549203849217 | Address: 215,Cedarhurst Dr

Feed Opportunities ▾ **Activities ▾** Profiles ▾ Organization Affiliations Contacts Schedule ▾ Emails Records

Default Activity

Activity Date: 12-10-2023 Item: Aspirin Upload File: Choose file No file chosen Activity Type*: Phone Call ▾

Call Status: ▾

Associate Opportunity

Opportunity Name: Search for a Opportunity ▾

Associate Contact*

Contact Name: Emily Johnson Phone Number: (201) 555-0123 Email: Email City/Town: City/Town State: State

Notes: Add

Add Activity

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

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

Q Search

Associate Opportunity

Opportunity Name: Search for a Opportunity ▾

Associate Contact*

Contact Name: Emily Johnson Phone Number: (201) 555-0123 Email: Email City/Town: City/Town State: State

Notes: Add

There are no Forms Mapped to this Template. Please ask your admin to map Form to this Activity template

Geotrack is enabled (This Feature is only available on Gridlex Android/iOS App) → 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.