Welcome to our comprehensive guide on editing or updating 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 editing or updating 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.

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

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**Step 2:** Click on the Organization Name you want to edit or update activities.

| GRIDLEX         | Inbox - Zip Service (          | Ops ~ Zip CRM ~ S        | ky Accounting & ERP ~ Sk              | y Expenses 🗸 🛛 Ray HR          | MS ~ Objects Setti  | ngs 🗸 My Account 🗸 | ,                  |  | Zolan<br>Zolan Interna v |
|-----------------|--------------------------------|--------------------------|---------------------------------------|--------------------------------|---------------------|--------------------|--------------------|--|--------------------------|
| Q Search        | Organizations A                | dd Organizations         | Add Organizations From Ma             | ster Data Map Org              | anizations to Units |                    |                    |  |                          |
| Inbox           | Saved Views View Clear Filters |                          |                                       |                                |                     |                    |                    |  |                          |
| 🗠 Emails        | Organization ID                | Organization             | Affiliated Contacts                   | All Addresses                  | All Towns :         | All States         | All Emails         | All Phone Num  | All Website Lin          |
| 💴 SMS           | 118729793859938                | gridlexmail 🗹            |                                       |                                |                     |                    | marketingandsales@ |  |                          |
| 📞 Calls         | 118729793384724                | google 🗹                 |                                       |                                |                     |                    | forwarding-        |  |                          |
| O Auto Dialer   | 110/23/33304/24                | googie 🖪                 |                                       |                                |                     |                    | noreply@google.con |  |                          |
| Zip CRM         | 118728463906958                | Test 🗹                   |                                       | H.no 4-256/2                   |                     | US                 |                    |  |                          |
| Opportunities > | 118688205549426                | Vader Life<br>Sciences 🗹 | Orville Chnadonnet                    | 12 Jedi Way                    | Mos Espa            | Louisiana          | reach@vader.com    | <b>L</b> +1-2015556464   | vaderhealth.cor          |
| Z Activities    |                                |                          |                                       |                                |                     |                    |                    | ➡+1-(973) 971-   |                          |
| Organizations > | 116580988986883                |                          | David Shaw, Emma<br>North             | 100 MADISON AVE                | MORRISTOWN          | New Jersey         |                    | 5000<br>Second Second Sec |                          |
| Contacts >      |                                | ß                        | North                                 |                                |                     |                    |                    | 7010   |                          |
| 🕔 Schedule      |                                | L                        | BARBARA JANE COVEN,                   | 463,Organization               |                     |                    |                    | State 1 − 6105930520   |                          |
| ┥ Campaigns     | 115067554920384                | True Health 🗹            | Vanessa Jones,<br>Brandon Brown, Ruth | Main St  <br>215.Cedarhurst Dr | Canton              | Georgia(GA)        |                    | +1-7707047078 +1-5622270562  |                          |
| Contracts >     |                                |                          | Parker, (more)                        | 2.0,00000000000000000          |                     |                    |                    | <b>S</b> +1-7202689915   |                          |
| Z Events        | 115067554838168                | Zember Partners          | Tom Charn                             | 6367 N,800th W                 | Canton              | Georgia(GA)        |                    | +1-6622472429 +1-8128736867  |                          |
| Zip Service Ops | 110007004838108                | C                        | Tom Sharp                             | 401, Wiley St                  | Cunton              | Georgia(GA)        |                    | +1-4108965976 +1-4047317137  |                          |
| Dashboard       | 1150675547454771               | General Systems          | David Shaw                            | 18410,Center St                | Education           | A-1                |                    | <b>S</b> +1-5107330984   |                          |
| Records         | 1150075547454771               | ß                        | Davia Shaw                            | 529,Weldon Ln                  | Edgemont            | Arkansas(AR)       |                    | +1-8709482488  |                          |

**Step 3:** Hover over the "Activities" option on the menu bar and click "Activities List" from the dropdown.

| GRIDLEX         | nbox 🗸 Zip Service Ops 🗸 Zip CRM 🗸 Sky Accounting & ERP 🗸 Sky Expenses 🗸 Ray HRMS 🗸 Objects Settings 🗸 My Account 🗸 | Zolan<br>Zolan Interna V |
|-----------------|---|--------------------------|
|                 | TRUE HEALTH<br>Organization Name: True Health   Organization ID: 1150675549203849217   Address1: 215,Cedarhurst Dr  |                          |
| nbox            | Feed Opportunities Activities Profiles Organization Affiliations Contacts Schedule Emails Records                   |                          |
| 🗠 Emails        | opportainues · Activities · Promes · Organization Animations Contacts Schedule · Entrais Records                    |                          |
| SMS             | Activities List Kno Feed Available for this Organization  |                          |
| 📞 Calls         | Activities Analytics  |                          |
| Auto Dialer     | Add - Default Activity  |                          |
| ip CRM          | Add - Record new activity   |                          |
| Opportunities > |   |                          |
| ~ Activities    |   |                          |
| Organizations > |   |                          |
| Contacts        |   |                          |
| Schedule        |   |                          |
| Campaigns       |   |                          |
| Contracts >     |   |                          |
| - Events        |   |                          |
| lip Service Ops |   |                          |
| Dashboard       |   |                          |
| Records         |   |                          |

**Step 4:** Click on the Activity ID you want to edit or update.

| GRIDLEX       | Inbox ~ Zip Servic             | e Ops ~ Zip CRM ~             | Sky Accounting & ERP | <ul> <li>Sky Expension</li> </ul> | es ~ Ro   | ay HRMS ~ Obje           | cts   | Settings 🗸 M                          | y Acco | unt ~      |   |               |     |         | Zolan<br>Ian interna |    |
|---------------|--------------------------------|-------------------------------|----------------------|-----------------------------------|-----------|--------------------------|-------|---------------------------------------|--------|------------|---|---------------|-----|---------|----------------------|----|
| Q Search      | TRUE HEALTH<br>Organization Na | <b>ime</b> : True Health   Or | ganization ID: 11506 | 75549203849:                      | 217   Add | <b>iressi</b> : 215,Ceda | rhurs | st Dr                                 |        |            |   |               |     |         |                      |    |
| Inbox         | Feed Opportur                  | nities v Activities v         | Profiles ~ Org       | anization Affilia                 | tions     | Contacts Sch             | edule | e v Emails                            | Rec    | ords       |   |               |     |         |                      |    |
| 🔁 Emails      |                                |                               |                      |                                   |           |                          |       |                                       |        |            |   |               |     |         |                      |    |
| SMS           | Saved Views                    |                               |                      | ~ Sa                              | ave View  | Clear Filters            |       | Export to Excel                       |        |            |   |               |     |         |                      |    |
| Calls         | Activity ID :                  |                               | Activity Date        |                                   |           |                          |       | i i i i i i i i i i i i i i i i i i i |        |            | : |               | : P |         | :                    |    |
| Auto Dialer   |                                |                               | ,                    |                                   |           | Created at               | •     | Updated at                            | :      | Notes      | : | Activity Type | : P | riority | :                    | -  |
| p CRM         | 12072108191177277              | Emily Johnson                 | Oct 12, 2023         | nihal@gridl                       | ex.com    | Oct 12, 2023             |       | Oct 12, 2023                          |        | Discussion |   | Phone Call    |     |         |                      |    |
| Opportunities |                                |                               |                      |                                   |           |                          |       |                                       |        |            |   |               |     |         |                      | •  |
| Activities    | H 4 1 Page                     | e 1 of1 ⊧                     | F                    |                                   |           |                          |       |                                       |        |            |   |               |     | 1 -     | 1 of 1 item          | ns |
| Organizations | >                              |                               |                      |                                   |           |                          |       |                                       |        |            |   |               |     |         |                      |    |
| Contacts      | >                              |                               |                      |                                   |           |                          |       |                                       |        |            |   |               |     |         |                      |    |
| Schedule      |                                |                               |                      |                                   |           |                          |       |                                       |        |            |   |               |     |         |                      |    |
| Campaigns     |                                |                               |                      |                                   |           |                          |       |                                       |        |            |   |               |     |         |                      |    |
| Contracts     | >                              |                               |                      |                                   |           |                          |       |                                       |        |            |   |               |     |         |                      |    |
| Events        |                                |                               |                      |                                   |           |                          |       |                                       |        |            |   |               |     |         |                      |    |
| p Service Ops |                                |                               |                      |                                   |           |                          |       |                                       |        |            |   |               |     |         |                      |    |
| Dashboard     |                                |                               |                      |                                   |           |                          |       |                                       |        |            |   |               |     |         |                      |    |
| Records       |                                |                               |                      |                                   |           |                          |       |                                       |        |            |   |               |     |         |                      |    |
| Sites         |                                |                               |                      |                                   |           |                          |       |                                       |        |            |   |               |     |         |                      |    |

**Step 5:** Click the "Edit" button next to the information you want to edit or update.

| GRIDLEX         | Inbox - Zip Service Ops - Zip C             | RM ~ Sky Accounting & ERP ~ S   | ky Expenses ~ Ray HRMS ~ Object           | s Settings ~ My Account ~ |               | Zolan<br>Zolan Interna v |
|-----------------|---|---------------------------------|---|---------------------------|---------------|--------------------------|
| Q Search        | TRUE HEALTH<br>Organization Name: True Heal | th   Organization ID: 115067554 | 9203849217   <b>Address1</b> : 215,Cedarh | urst Dr                   |               |                          |
| Inbox           | Feed Opportunities - Ad                     | tivities - Profiles - Organi    | zation Affiliations Contacts Sch          | nedule ~ Emails Records   |               |                          |
| 🖂 Emails        |   |                                 |   |                           |               |                          |
| SMS             | Details Edit                                |                                 |   |                           |               |                          |
| 📞 Calls         |   |                                 |   |                           |               |                          |
| 💿 Auto Dialer   | Activity ID                                 | Activity Date                   | Item                                      | Upload File               | Activity Type |                          |
| Zip CRM         | 1207210819117727745                         | 2023-10-12                      | Aspirin,                                  | -                         | Phone Call    |                          |
| Opportunities > | Call Status                                 |                                 |   |                           |               |                          |
| 🧭 Activities    | Answered                                    |                                 |   |                           |               |                          |
| Organizations > |   |                                 |   |                           |               |                          |
| Contacts >      | Associated Opportunity                      | dit                             |   |                           |               |                          |
| 🕔 Schedule      |   |                                 |   |                           |               |                          |
| ┥ Campaigns     | Opportunity Name                            | -                               |   |                           |               |                          |
| Contracts       |   |                                 |   |                           |               |                          |
| Z Events        | Associated Contact * Edit                   |                                 |   |                           |               |                          |
| Zip Service Ops | Contact Name                                | Phone Number                    | Email                                     | City/Town                 | State         |                          |
| Dashboard       | Emily Johnson                               | -                               | -   | -                         | -             |                          |
| 🔖 Records       |   |                                 |   |                           |               |                          |

**Step 6:** Make the required changes and click "Save" once done.

| GRIDLEX         | Inbox ~ Zip Service Ops ~ Zip CRM ~               | Sky Accounting & ERP ~ Sky Expense | es ~ Ray HRMS ~ Objects Setting           | gs ~ My Account ~          | Zolan<br>Zolan Interna v |
|-----------------|---|------------------------------------|---|----------------------------|--------------------------|
| <b>Q</b> Search | TRUE HEALTH<br>Organization Name: True Health   C | Drganization ID: 11506755492038492 | 217   <b>Address1</b> : 215,Cedarhurst Dr |                            |                          |
| Inbox           | Feed Opportunities ~ Activitie                    | es v Profiles v Organization Affil | liations Contacts Schedule ~              | Emails Records             |                          |
| 🖂 Emails        | Activities ·                                      | Promos · Organization Ann          | indiona contacta schedule -               | LITUIS RECORD              |                          |
| 📁 SMS           | Details   |                                    |   |                            |                          |
| 📞 Calls         | Activity ID: *                                    | Activity Date:                     | Items:                                    | Upload File:               | Activity Type: *         |
| 📀 Auto Dialer   | 1207210819117727745                               | 12-10-2023                         | × Aspirin •                               | Choose file No file chosen | Phone Call               |
| Zip CRM         |   |                                    |   |                            |                          |
| Opportunities > | Call Status:                                      |                                    |   |                            |                          |
| Activities      | Answered ~  |                                    |   |                            |                          |
| Organizations > | Save Cancel                                       |                                    |   |                            |                          |
| Contacts >      |   |                                    |   |                            |                          |
| 🕔 Schedule      | Associated Opportunity Edit                       |                                    |   |                            |                          |
| ┥ Campaigns     | Opportunity Name                                  | -                                  |   |                            |                          |
| Contracts       |   |                                    |   |                            |                          |
| Z Events        | Associated Contact * Edit                         |                                    |   |                            |                          |
| Zip Service Ops | Contact Name                                      | Phone Number                       | Email                                     | City/Town                  | State                    |
| Dashboard       | Emily Johnson                                     | -                                  | ernali                                    | -                          | -                        |
| Necords         | crimy sormaon                                     |                                    |   |                            |                          |
| Sites           |   |                                    |   |                            |                          |

Congratulations! You have learned how to edit or update 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 <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.