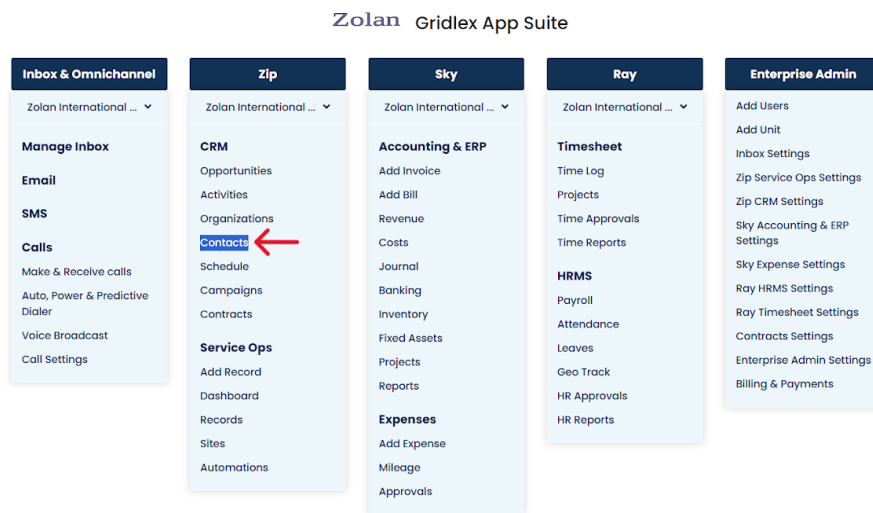


In Gridlex Zip CRM, affiliating organizations to contacts helps track business relationships and streamline communication. This tutorial will guide you through this efficient process, enhancing your networking and data management.

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.

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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 BELTUNE AVE NE, 750 E BELTUNE AVE NE	GRAND RAPIDS	MI		6169492600	
1193732793197481...	Ruby R. Little					RubyRLittle@jourapl	+1-267-291-8471-	

Step 3: Click ‘Organizations’ on the contact page.

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Contact Profile

Basic Information

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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

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A

B

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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.’


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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...	True Health 	BARBARA JANE COVEN, Vanessa Jones, Brandon Brown, Ruth Parker, (more)	483,Organization Main St 215,Cedarhurst Dr	Canton	Georgia(GA)		+1-6105930520 +1-7707047078 +1-5622270562 +1-7202689915	

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




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.

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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...	Assign/Transfer
119337905042569...	StopGrey 					OrvilleChnadonnet@			 Assign
1193379049813323...	Atlas Realty 	Aubrey Labelle				AubreyLabelle@tele			Assign Transfer
119337904884024...	First Choice Garden Maintenance 	Musette Compagnon				MusetteCompagnon			Assign Transfer
119337904759453...	Prestigabiz 	Travers Leroy				TraversLeroy@joura			Assign Transfer
119337904634463...	Oranges Records & Tapes 	Royale Archambault				RoyaleArchambault			Assign Transfer
119337904540091...	Sounds of Soul Records & Tapes 	Janet J. Lee				JanetJLee@jourapic			Assign Transfer
119337904478435...	MaryEShank@telewa 	Mary E. Shank							Assign Transfer
119337904382805...	Wherehouse Music 	Cornelia R. Villalta				CorneliaRVillalta@dc			Assign Transfer
1193379043177834...	Asian Answers 	Lori J. Pearson				LoriJPearson@dayre			Assign Transfer
119337904233907...	Stratapro 	Charles I. Harman				CharlesHarman@joi			Assign Transfer

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The 'Transfer' button lets you remove all the current contact affiliations from that organization and only affiliate the selected contact.

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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...	Assign/Transfer
118688205549426...	Vader Life Sciences	Brandon Brown	12 Jedi Way	Mos Espa	Louisiana	reach@vader.com	+1-2015556464	vaderhealth.com	Assign Transfer
116580988986883...	MORRISTOWN MEDICAL CENTER	David Shaw, Emma North	100 MADISON AVE	MORRISTOWN	New Jersey		+1-(973) 971-5000 +1-(973) 290-7010		Assign Transfer
115067554838168...	Zember Partners	Tom Sharp	6367 N.800th W 401,Wiley St	Canton	Georgia(GA)		+1-6622472429 +1-8128738867 +1-4108965976 +1-4047317137		Assign Transfer
115067554745477...	General Systems	David Shaw	18410,Center St 529,Weldon Ln	Edgemont	Arkansas(AR)		+1-5107330984 +1-8709482488		Assign Transfer
115067554655295...	United Resources	Meg Banks	9396,Cherry Tree Dr 7570,176th St	Mc Alpin	Florida(FL)		+1-389633779 +1-8653421838 +1-2035014278		Assign Transfer
1150675545714114...	Acme Inc	Sally Smith	223,Caldwell Rd 1163,Hyacinth St	Saint Augustine	Florida(FL)		+1-4233577941 +1-9049407703		Assign Transfer
20000000000039...	John Doe Organization	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...	StopGrey	Vanessa Jones				OrvilleChnadonnet@r			remove
1186882055494262...	Vader Life Sciences		12 Jedi Way	Mos Espa	Louisiana	reach@vader.com	+1-2015556464	vaderhealth.com	remove
1150675549203849...	True Health	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

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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 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.