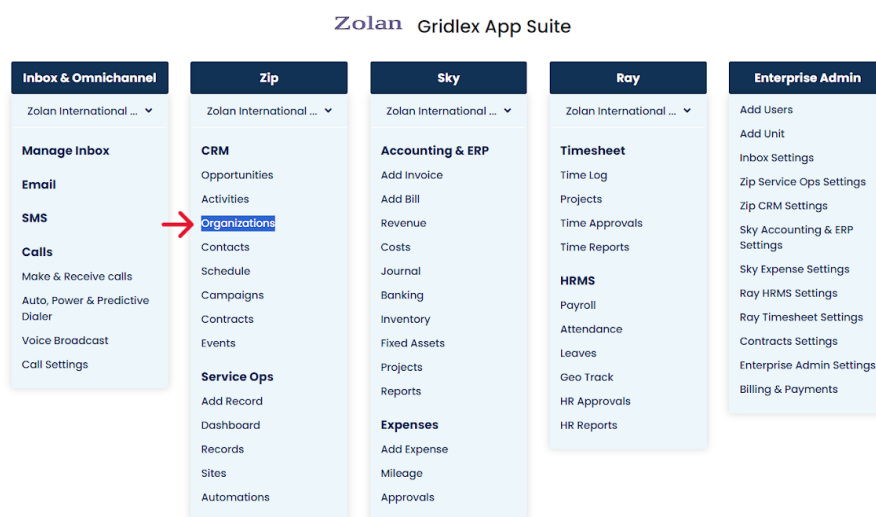


Welcome to our comprehensive guide on adding affiliate contacts to organizations in Gridlex Zip.

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.

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Organization ID	Organization	Affiliated Contacts	All Addresses	All Towns	All States	All Emails	All Phone Num...	All Website Lin...
119337905042569...	StopGrey	Vanessa Jones				OrvilleChnadonnet@		
1193379049813323...	Atlas Realty	Aubrey Labelle				AubreyLabelle@telev		
119337904884024...	First Choice Garden Maintenance	Musette Compagnon				MusetteCompagnon		
119337904759453...	Prestigabiz	Travers Leroy				TraversLeroy@jourra		
1193379046334463...	Oranges Records & Tapes	Royale Archambault				RoyaleArchambault@		
119337904540091...	Sounds of Soul Records & Tapes	Janet J. Lee				JanetJLee@jourrapic		
119337904478435...	MaryEShank@telewa	Mary E. Shank						
119337904382805...	Wherehouse Music	Cornelia R. Villalta				CorneliaRVillalta@dc		
1193379043177934...	Asian Answers	Lori J. Pearson				LoriJPearson@dayre		
119337904233907...	Stratapro	Charles I. Harman				CharlesIHarman@jo		
11919827168419717...	gridlex					navya@gridlex.com		
1191283357389246...	zolan					support@zolan.com		

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

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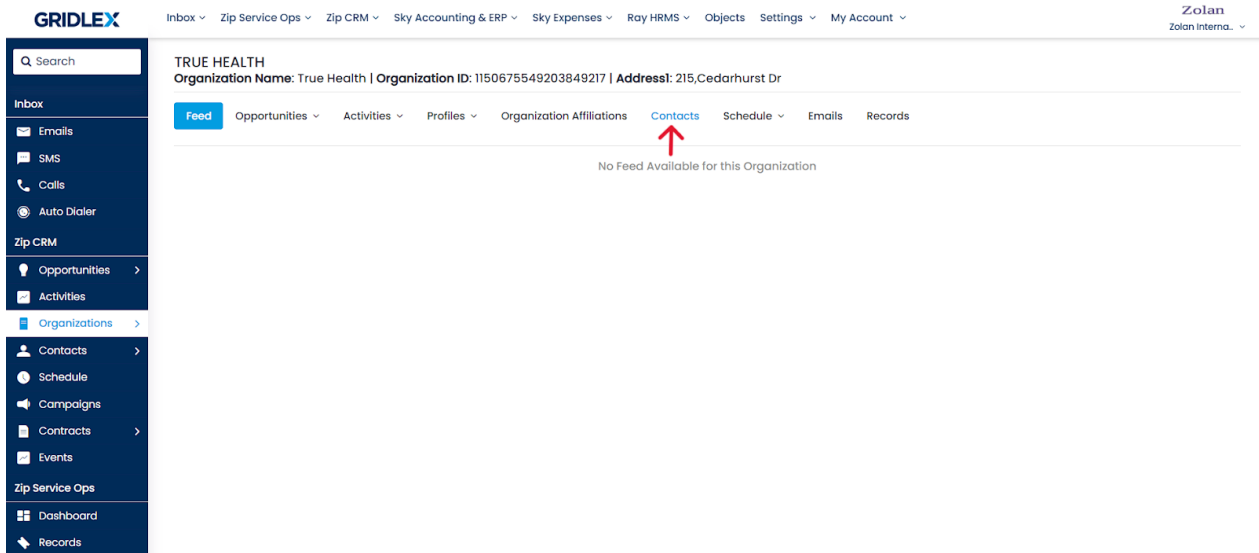
Save View

Clear Filters

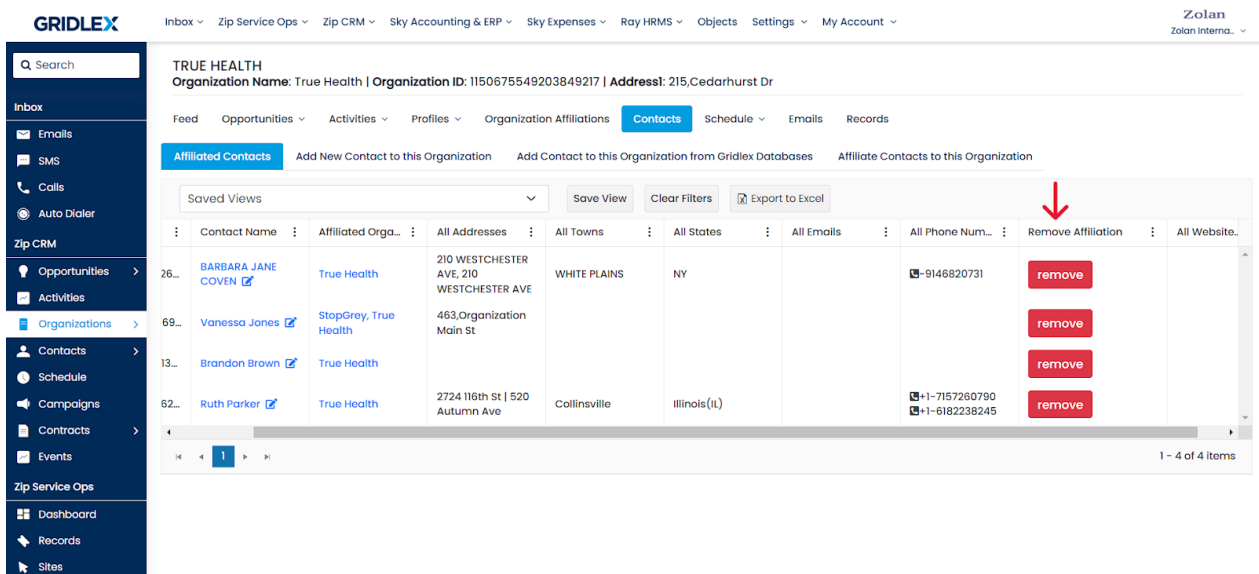
Export to Excel

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: 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.

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TRUE HEALTH

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

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Add Contact to this Organization from Gridlex Databases

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Contact Name	Affiliated Orga...	All Addresses	All Towns	All States	All Emails	All Phone Num...	Remove Affiliation	All Website...
26... BARBARA JANE COVEN	True Health	210 WESTCHESTER AVE, 210 WESTCHESTER AVE	WHITE PLAINS	NY		9146820731	remove	
69... Vanessa Jones	StopGrey, True Health	463,Organization Main St					remove	
13... Brandon Brown	True Health						remove	
62... Ruth Parker	True Health	2724 116th St 520 Autumn Ave	Collinsville	Illinois(IL)		+1-7157260790 +1-6182238245	remove	

1 - 4 of 4 items

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)

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TRUE HEALTH

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

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Add Contact to this Organization from Gridlex Databases

Affiliate Contacts to this Organization

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Contact ID	Contact Name	Affiliated Orga...	All Addresses	All Towns	Assign/Transfer	All States	All Emails	All Phon...
119337905057249...	Orville Chnadonnet	Vader Life Sciences			Assign Transfer			
119337904996012...	Aubrey Labelle	Atlas Realty			Assign Transfer			
1193379049175789...	Musette Compagnon	First Choice Garden Maintenance			Assign Transfer			
119337904784619...	Travers Leroy	Prestigabiz			Assign Transfer			
119337904655434...	Royale Archambault	Oranges Records & Tapes			Assign Transfer			
119337904560643...	Janet J. Lee	Sounds of Soul Records & Tapes			Assign Transfer			
119337904492276...	Mary E. Shank	MaryEShank@tel...			Assign Transfer			
119337904398743...	Cornelia R. Villalta	Wherehouse Music			Assign Transfer			

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.

The screenshot shows the Gridlex CRM interface. The top navigation bar includes 'Inbox', 'Zip Service Ops', 'Zip CRM', 'Sky Accounting & ERP', 'Sky Expenses', 'Ray HRMS', 'Objects', 'Settings', and 'My Account'. The user 'Zolan' is logged in. The left sidebar contains a search bar and a menu with 'Inbox', 'Emails', 'SMS', 'Calls', 'Auto Dialer', 'Zip CRM', 'Opportunities', 'Activities', 'Organizations', 'Contacts', 'Schedule', 'Campaigns', 'Contracts', 'Events', 'Zip Service Ops', 'Dashboard', and 'Records'. The main content area is titled 'TRUE HEALTH' with organization details. Below this, there are tabs for 'Feed', 'Opportunities', 'Activities', 'Profiles', 'Organization Affiliations', 'Contacts' (selected), 'Schedule', 'Emails', and 'Records'. A button 'Affiliate Contacts to this Organization' is visible. The 'Contacts' table has columns: Contact ID, Contact Name, Affiliated Orga..., All Addresses, All Towns, Assign/Transfer, All States, All Emails, and All Phon. The 'Assign/Transfer' column contains 'Assign' and 'Transfer' buttons for each contact. A red arrow points to the 'Transfer' button for the contact 'Aubrey Labelle'.

Contact ID	Contact Name	Affiliated Orga...	All Addresses	All Towns	Assign/Transfer	All States	All Emails	All Phon
119337904996012...	Aubrey Labelle	Atlas Realty			Assign Transfer			
1193379049175789...	Musette Compagnon	First Choice Garden Maintenance			Assign Transfer			
119337904784619...	Travers Leroy	Prestigabiz			Assign Transfer			
119337904655434...	Royale Archambault	Oranges Records & Tapes			Assign Transfer			
119337904560643...	Janet J. Lee	Sounds of Soul Records & Tapes			Assign Transfer			
119337904492276...	Mary E. Shank	MaryEShank@tel...			Assign Transfer			
119337904398743...	Cornelia R. Villalta	Wherehouse Music			Assign Transfer			

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.