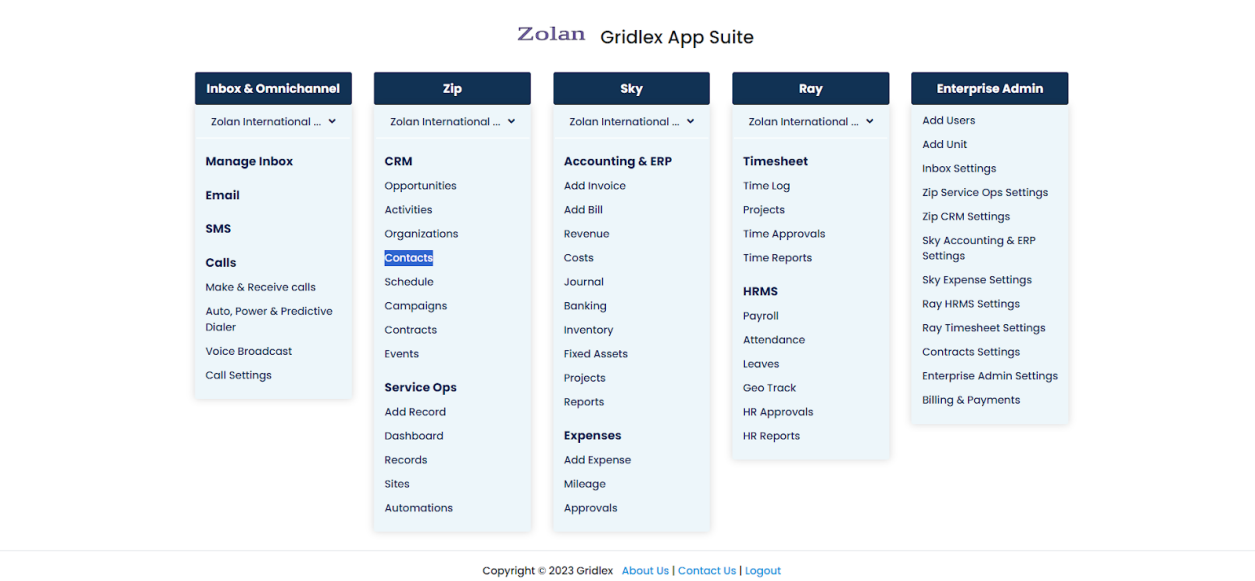


Welcome to our comprehensive guide on editing or updating activity from a contact page.

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 a contact page in Gridlex Zip.

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



Step 2: Click on the Contact to which you want to add edit or update activities.

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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	
120428898700369...	Vanessa Jones	StopGrey, True Health	463,Organization Main St					
1204281994327158...	JOHN F MOORE		740 EAST STATE ST, 740 EAST STATE ST	SHARON	PA		7249833911	
1204273187010203...	Brandon Brown							
120426672564713...	Brandon Brown	True Health						
1194131562053320...	Nihal Mohammed					niha1@gridlex.com		
1194130557710458...	Zolan Support					support@zolan.gridlex.com		
1193760174230548...	DAVID MICHAEL DEN BRABER		750 E BELTLINE AVE NE, 750 E BELTLINE AVE NE	GRAND RAPIDS	MI		6169492600	
1193732793197481...	Ruby R. Little					RubyR.Little@jourrapids.com	+1-267-291-8471	

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

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Activities List

Activities Analytics

Add - Default Activity

Add - Record new activity

No Feed Available for this Contact

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

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Activity ID	Organizations	Activity Date	Created By	Created at	Updated at	Notes	Activity Type	Priority
1207219122270982...	True Health	Oct 12, 2023	nihal@gridlex.com	Oct 12, 2023	Oct 12, 2023	Discussion.	Phone Call	

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

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Details [Edit](#)

Activity ID	Activity Date	Item	Upload File	Activity Type
1207219122270982145	2023-10-12	Aspirin,	-	Phone Call

Call Status
Answered

Associated Opportunity [Edit](#)

Opportunity Name
-

Associated Organization * [Edit](#)

Organization Name	Phone Number	Email	City/Town	State
True Health	7707047078	-	Canton	Georgia(GA)

Step 6: Make the required changes and click “Save” once done.

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Details

Activity ID:

Activity Date:

Items:

Upload File:

Activity Type:

1207219122270982145

12-10-2023

Aspirin

Choose file

No file chosen

Phone Call

Call Status:

Recorded

Save

Cancel

Associated Opportunity

Edit

Opportunity Name

-

Associated Organization

Edit

Organization Name	Phone Number	Email	City/Town	State
True Health	7707047078	-	Canton	Georgia(GA)

Congratulations! You have learned how to edit or update activity from a contact 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.