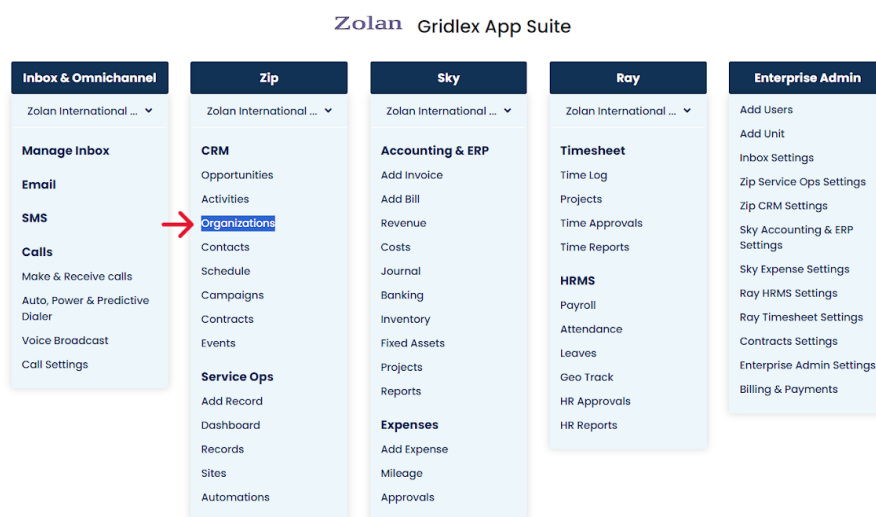


Welcome to our comprehensive guide on adding affiliate contacts to organizations in Gridlex Zip.

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.

GRIDLEX

Inbox

Zip Service Ops

Zip CRM

Sky Accounting & ERP

Sky Expenses

Ray HRMS

Objects

Settings

My Account

Zolan

Zolan Interna...

Q Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Events

Zip Service Ops

Dashboard

Records

Sites

Organizations

Add Organizations

Add Organizations From Master Data

Map Organizations to Units

Saved Views

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... |
|----------------------|---------------------------------|----------------------|---------------|-----------|------------|----------------------|------------------|--------------------|
| 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.

GRIDLEX

Inbox

Zip Service Ops

Zip CRM

Sky Accounting & ERP

Sky Expenses

Ray HRMS

Objects

Settings

My Account

Zolan

Zolan Interna...

Q Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Events

Zip Service Ops

Dashboard

Records

Organizations

Add Organizations

Add Organizations From Master Data

Map Organizations to Units

Saved Views

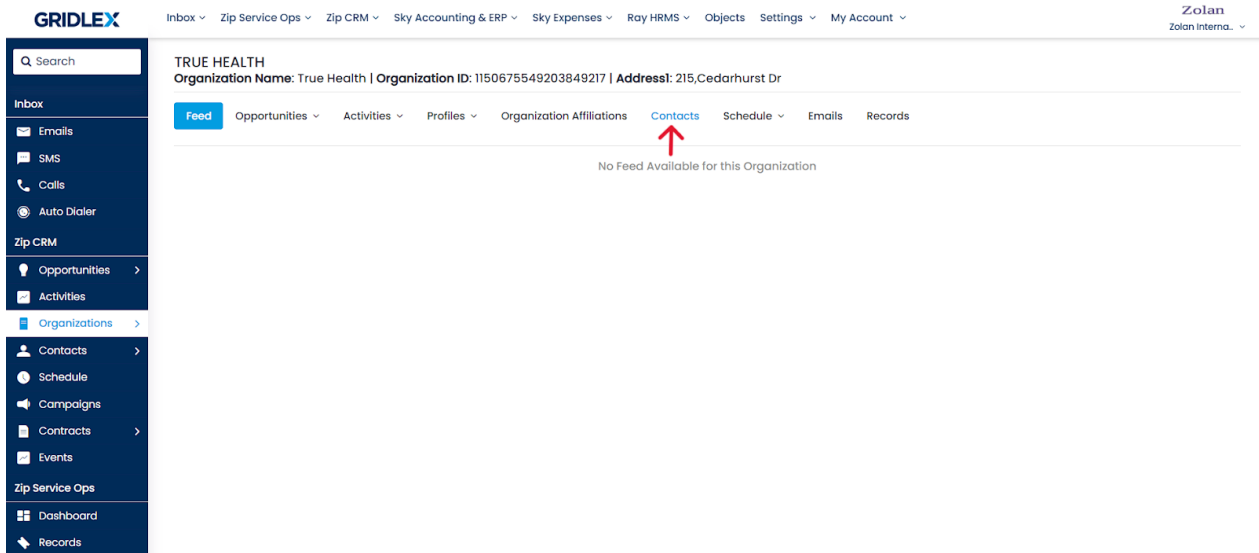
Save View

Clear Filters

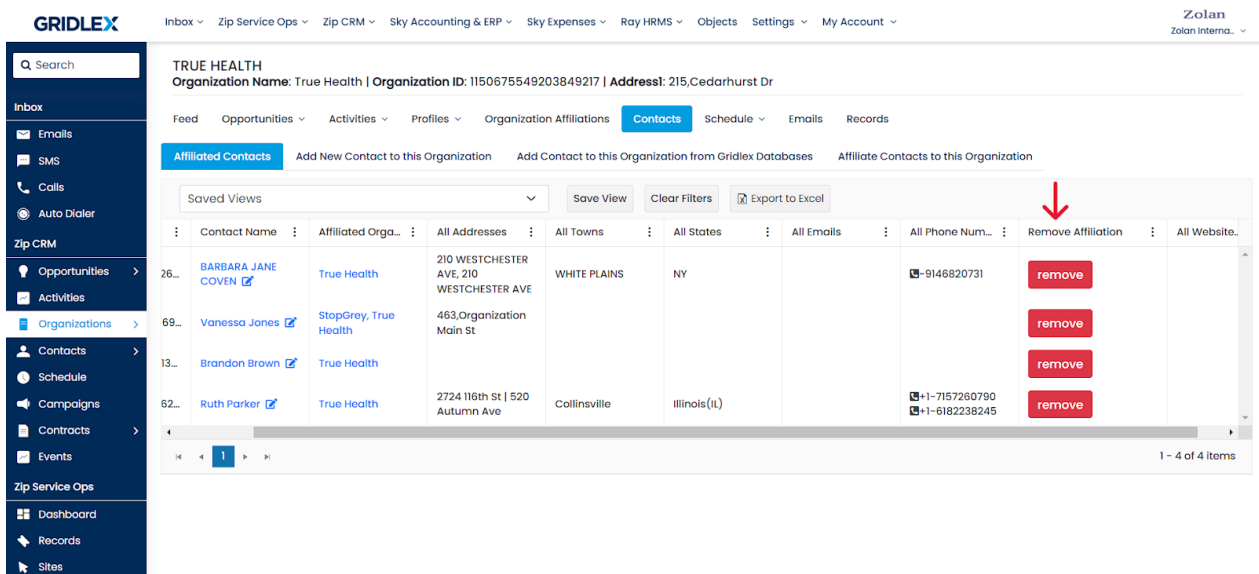
Export to Excel

| 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<br>+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<br>+1-7707047078<br>+1-5622270562<br>+1-7202689915 |                    |
| 115067554838168...  | Zember Partners           | Tom Sharp   | 6367 N,800th W   401,Wiley St                | Canton     | Georgia(GA)  |                               | +1-6622472429<br>+1-8128736867<br>+1-4108965976<br>+1-4047317137 |                    |
| 1150675547454771... | General Systems           | David Shaw  | 18410,Center St   529,Weldon Ln              | Edgemont   | Arkansas(AR) |                               | +1-5107330984<br>+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.

GRIDLEX

Inbox
Zip Service Ops
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Sky Expenses
Ray HRMS
Objects
Settings
My Account

Zolan  
Zolan Interna...

Q Search

Inbox

Emails
SMS
Calls
Auto Dialer

Zip CRM

Opportunities
Activities
Organizations

Contacts
Schedule
Campaigns
Contracts
Events

Zip Service Ops

Dashboard
Records

TRUE HEALTH

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

Feed
Opportunities
Activities
Profiles
Organization Affiliations

Contacts

Schedule
Emails
Records

Affiliated Contacts

Add New Contact to this Organization
Add Contact to this Organization from Gridlex Databases
Affiliate Contacts to this Organization

Saved Views

Save View

Clear Filters

Export to Excel

| 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<br>+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)

GRIDLEX

Inbox
Zip Service Ops
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Sky Expenses
Ray HRMS
Objects
Settings
My Account

Zolan  
Zolan Interna...

Q Search

Inbox

Emails
SMS
Calls
Auto Dialer

Zip CRM

Opportunities
Activities
Organizations

Contacts
Schedule
Campaigns
Contracts
Events

Zip Service Ops

Dashboard
Records

TRUE HEALTH

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

Feed
Opportunities
Activities
Profiles
Organization Affiliations

Contacts

Schedule
Emails
Records

Affiliated Contacts

Add New Contact to this Organization
Add Contact to this Organization from Gridlex Databases
Affiliate Contacts to this Organization

Saved Views

Save View

Clear Filters

Export to Excel

| 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 Zolan Interna.' 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', 'Schedule', 'Emails', and 'Records'. The 'Contacts' tab is active, showing a list of contacts. The table has columns for 'Contact ID', 'Contact Name', 'Affiliated Orga...', 'All Addresses', 'All Towns', 'Assign/Transfer', 'All States', 'All Emails', and 'All Phon'. The first contact, 'Aubrey Labelle', is highlighted, and a red arrow points to the 'Transfer' button in the 'Assign/Transfer' column.

| 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](mailto: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.