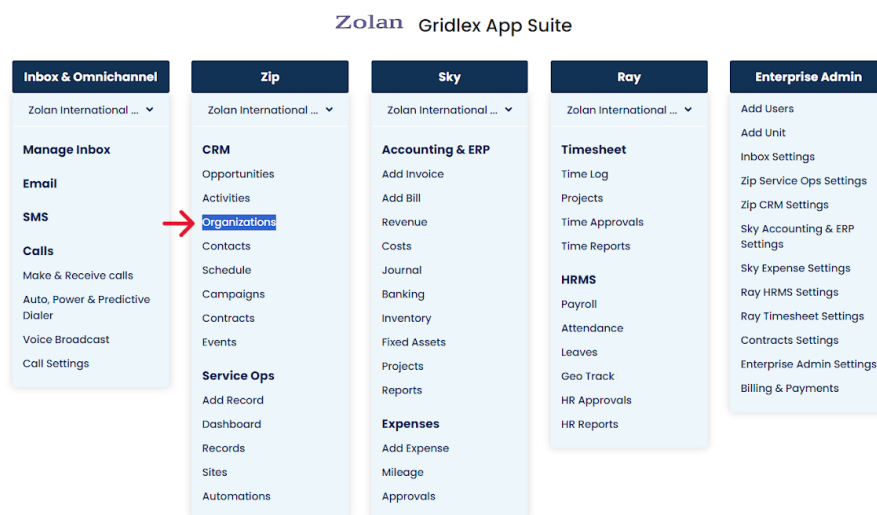


Welcome to our comprehensive guide on editing or updating activity from an organization page.

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.



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

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Save View

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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
11658098986883...	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: Hover over the “Activities” option on the menu bar and click “Activities List” from the dropdown.

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TRUE HEALTH

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

Feed

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Organization Affiliations

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Activities List

Activities Analytics

Add - Default Activity

Add - Record new activity

No Feed Available for this Organization

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

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

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Saved Views ▾ Save View Clear Filters Export to Excel

Activity ID	Contacts	Activity Date	Created By	Created at	Updated at	Notes	Activity Type	Priority
12072108191177277...	Emily Johnson	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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TRUE HEALTH
Organization Name: True Health | **Organization ID:** 1150675549203849217 | **Address:** 215,Cedarhurst Dr

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Details **Edit**

Activity ID	Activity Date	Item	Upload File	Activity Type
1207210819117727745	2023-10-12	Aspirin,	-	Phone Call

Call Status
Answered

Associated Opportunity **Edit**

Opportunity Name -

Associated Contact * **Edit**

Contact Name	Phone Number	Email	City/Town	State
Emily Johnson	-	-	-	-

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

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TRUE HEALTH

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

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Details

Activity ID:

Activity Date:

Items:

Upload File:

Activity Type:

1207210819117727745

12-10-2023

Aspirin

Choose file | No file chosen

Phone Call

Call Status:

Answered

Save

Cancel

Associated Opportunity

Opportunity Name

Associated Contact

Contact Name

Phone Number

Email

City/Town

State

Emily Johnson

-

-

-

-

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 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.