Welcome to our comprehensive guide on updating a record in Gridlex Zip.

Gridlex Zip incorporates a record editing and updating feature to facilitate the systematic management of customer interactions. This feature is crucial for maintaining accuracy due to the continuous influx of customer requests and information updates.

This tutorial will walk users through the process of updating records.

Step 1: Log in to the Gridlex App Suite and click 'Records' under the Zip section.

Step 2: Select the record that you want to edit or update.

How to Manage Record Associations?

You can scroll down on the record information page to edit Record Associations, such as Associated Counterparties, Associated Organizations, and Associated Contacts (See below)

Associating or Disassociating Counterparties:

Step 3: Enter the organization details you want to search.

Step 4: Click the 'Search' button

Step 5: Click the 'Associate' button under the action column to associate the record with the corresponding organization.

Step 6: You'll see that the organization is currently associated with the record. Click the 'Disassociate' button under the Action column to disassociate it.

You can also modify your search criteria in the dropdown menu on the left side of the 'Search' button. Doing this allows you to search for native fields such as Organization ID, Organization Name, All Addresses, and Organization Information such as Network ID and Organization Type and associate it to the record.

To demonstrate, we'll be using the 'All Addresses' criteria. (See below steps)

Step 7: Click the dropdown menu on the left side of the 'Search' button, and select 'All Addresses'

Step 8: Enter the keyword and click 'Search'

Step 9: You'll see that the address that has the keyword you entered will be shown in the search results. Click the 'Associate' button to associate that organization with the record.

To see the list of all addresses saved in Gridlex Zip, leave the search bar empty and click 'Search.'

The result will now show all the addresses saved in Gridlex Zip. (See below)

The same steps apply to manually associating organizations and contacts to the record.

Organizations:

You can search for the organization and click the 'Associate' button.

To disassociate, click the 'Disassociate' button.

Contacts:

You can search for the contact and click the 'Associate' button.

To disassociate, click the 'Disassociate' button.

How to Edit Record Standard Information?

Step 10: Scroll to the top of the screen and click 'Edit' on the right side of the screen.

Step 11: Edit all the fields as required, scroll to the bottom, and click 'Update.'

Note: To understand the various fields on this page, please refer to this guide: [How to Add a Record and Access Record Communications in Gridlex Zip?](#)

Congratulations! You have now learned how to edit or update a record 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.