

Welcome to our tutorial on creating and updating profiles in Gridlex Zip CRM.

Step 1: Log in to your Gridlex App Suite account and click the "Zip CRM Settings" option under the Enterprise Admin tab.

How to Map Profiles to Organizations?

Step 2: Scroll down and click 'Map Profiles to Organizations' under the Profiles Section.

Step 3: Click on the profile name you want to map to organizations.

You'll see a list of all Organizations here.

Step 4: Once you have located the organizations you want to map to the profile, check the corresponding box and click 'Submit.'

Step 5: Return to the profile list page and click 'Profiles Mapped to Organizations.'

On this page, you can map multiple profiles to organizations.

Step 6: Click on the checkbox under the 'Edit' column to see which profiles are mapped to the corresponding organizations. Click on the blank space under the 'Select Profile' column to map a profile to the corresponding organization.

Step 7: Select the profile you wish to map to the organization.

You can map profiles to multiple organizations here as well (See below)

Step 8: Once done, scroll to the bottom and click 'Submit.'

How to Map Profiles to Contacts?

Step 9: Log in to your Gridlex App Suite account and click the "Zip CRM Settings" option under the Enterprise Admin tab.

Step 10: Scroll down and click 'Map Profiles to Contacts' under the Profiles Section.

Step 11: Click on the profile you want to map to contacts.

Step 12: Check the boxes corresponding to the contacts you want to map to the profile.

Step 13: Once you select the contacts, scroll to the bottom and click 'Submit.'

Step 14: Once you're on the profile list page, click 'Profiles Mapped to Contacts.'

Step 15: Similar to how we map organizations, you can click on the checkbox under the 'Edit' column to see which profiles are mapped to the corresponding contacts. Click on the blank space under the 'Select Profile' column to map a profile to the corresponding contact.

You can map profiles to multiple contacts here as well (See below)

Step 16: Once done, scroll to the bottom and click 'Submit.'

Congratulations! You have now learned to map profiles to organizations and contacts 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.