

Importance: Incorporating organizations into a CRM (Customer Relationship Management) system is essential for streamlining business operations and fostering stronger customer relationships. It allows companies to maintain a structured database of all their corporate clients or partners, enabling a holistic view of interactions, contracts, and opportunities. This not only enhances efficiency by avoiding data redundancy but also aids in identifying potential cross-selling or up-selling possibilities, ensuring customized communication, and making informed decisions based on collective data. By effectively tracking and managing organization-level information, businesses can more readily anticipate client needs and boost overall customer satisfaction.

Organizations can be added to Gridlex Zip manually, through importing, or from the contacts page. This guide focuses on manual addition.

Step 1: Log in to the Gridlex App Suite and click on “Organizations” located under the Zip section.

Step 2: On the Organizations page, locate and click “Add Organizations”.

Note: The availability of this feature depends on your assigned permissions. If you don't have the permission to view or add organizations, you'll be unable to do so. To obtain access, please reach out to your enterprise admin.

Step 3: A form will pop up for the organization's information. Fill in details like the organization's name, affiliation, type, and contact information.

Step 4: Below the main form, you'll see options to map the organization. Assign the right profiles, opportunity template, and activity template. Finalize the entry by clicking “Submit”.

Step 5: Your organization has been successfully added to Gridlex Zip. Should you need to make any changes in the future, remember you have the flexibility to edit this organization's information anytime you want.

Now, you're adept at manually adding organizations within the Gridlex Zip platform. For other organization management methods, refer to related guides such as "How to Import 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 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.