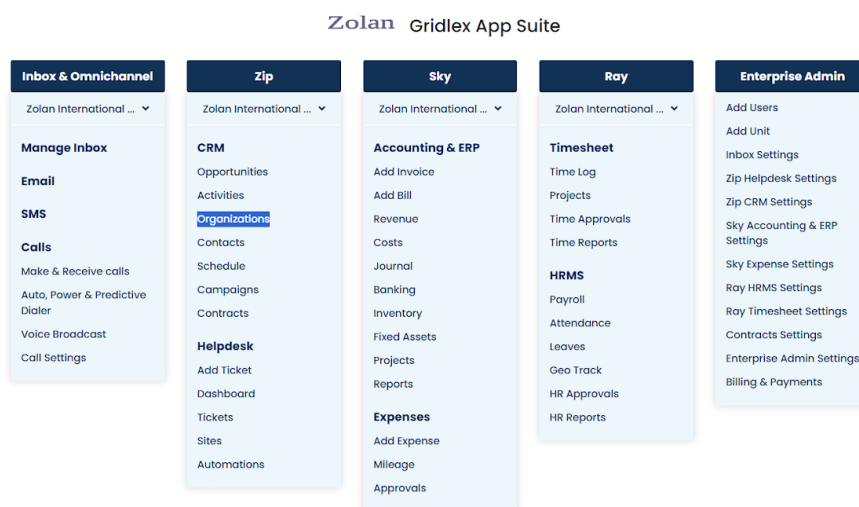


Importance: Incorporating organizations into a CRM (Customer Relationship Management) system is essential for streamlining business operations and fostering stronger customer relationships. It allows companies to maintain a structured database of all their corporate clients or partners, enabling a holistic 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.

**GRIDLEX** | Inboxes | Zip Helpdesk | Zip CRM | Sky Accounting & ERP | Sky Expenses | Ray HRMS | Objects | Settings | My Account | Zolan

Search

**Organizations** | Add Organizations | Add Organizations From Master Data | Map Organizations to Units

Saved Views | Save View | Clear Filters | Export to Excel

Organization ID	Organization Name	Affiliated Contacts	All Addresses	All Towns	All States	All Emails	All Phone Numbers	All Website Links
1150675549203849217	True Health	Ruth Parker	463,Organization Main St   215,Cedarhurst Dr	Canton	Georgia(GA)		+1-6105930520 +1-7707047078 +1-5622270562 +1-7202668915	
115067554831687809	Zember Partners	Tom Sharp	6367 N,800th W   401,Wiley St	Canton	Georgia(GA)		+1-6822472429 +1-8128736867 +1-4108965976 +1-4047317137	
1150675547454771201	General Systems	David Shaw	18410,Center St   529,Weldon Ln	Edgemont	Arkansas(AR)		+1-5107330984 +1-8709482488	
11506755465529507...	United Resources	Meg Banks	9395,Cherry Tree Dr   7570,176th St	Mc Alpin	Florida(FL)		+1-389633779 +1-8653421838 +1-2035014278	
1150675545714114561	Acme Inc	Sally Smith	223,Caldwell Rd   1163,Hyacinth St	Saint Augustine	Florida(FL)		+1-4233577941 +1-9049407703	
20000000000003941	John Doe Organization	John Doe, John Shore						
20000000000003927	Softland							
20000000000003926	Park Tree							
20000000000003925	Sea View							
20000000000003924	Blue Lake		1289 Woodland Avenue	Metairie	Louisiana	support@seaview.org	+1-9857465039	https://twitter.com/...

Page 1 of 1 | 1 - 22 of 22 Items

**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.

**GRIDLEX** | Inboxes | Zip Helpdesk | Zip CRM | Sky Accounting & ERP | Sky Expenses | Ray HRMS | Objects | Settings | My Account | Zolan

Search

**Organizations** | Add Organizations | Add Organizations From Master Data | Map Organizations to Units

Add New Organization | Import | Previous File Imports | Import Logs

**Basic Information**

Organization Name \*  
SKY HIGH PHARMACEUTICALS

Visible to \*  
 Visible to all units  Visible to selected units

Organization Affiliation  
True Health

Affiliation Type  
Subsidiary

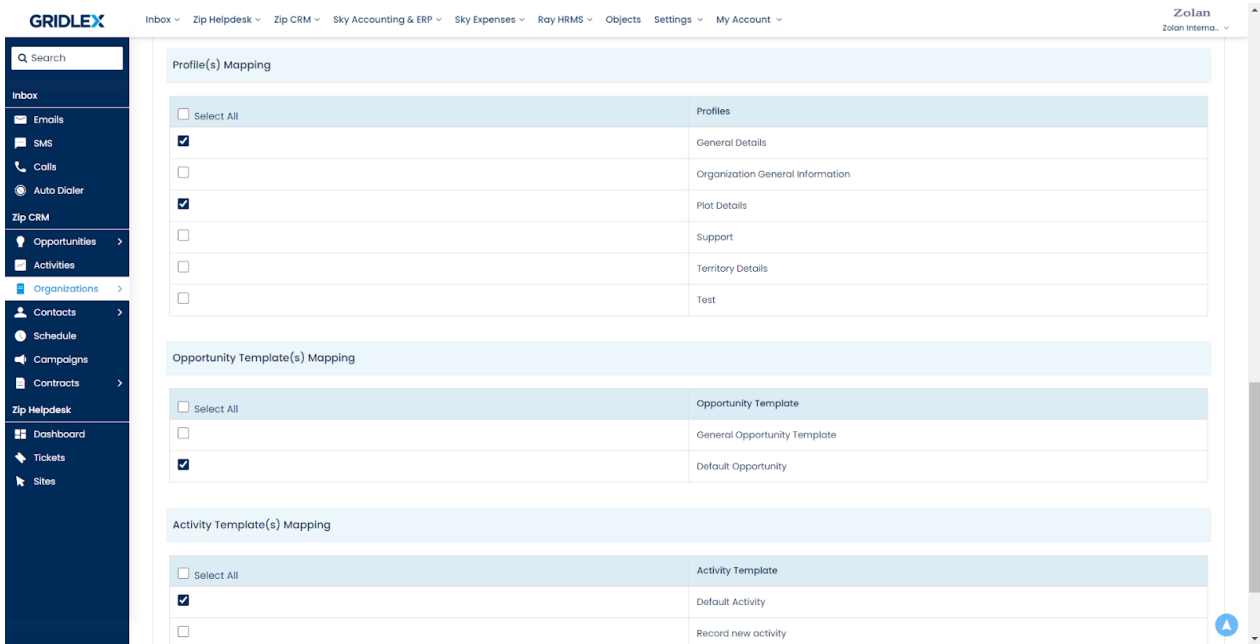
Notes  
Poppins - Medium | 15 | Bold | Italic | Underline | Strikethrough | Link | Unlink

**Phone, Email & Social Media Details**

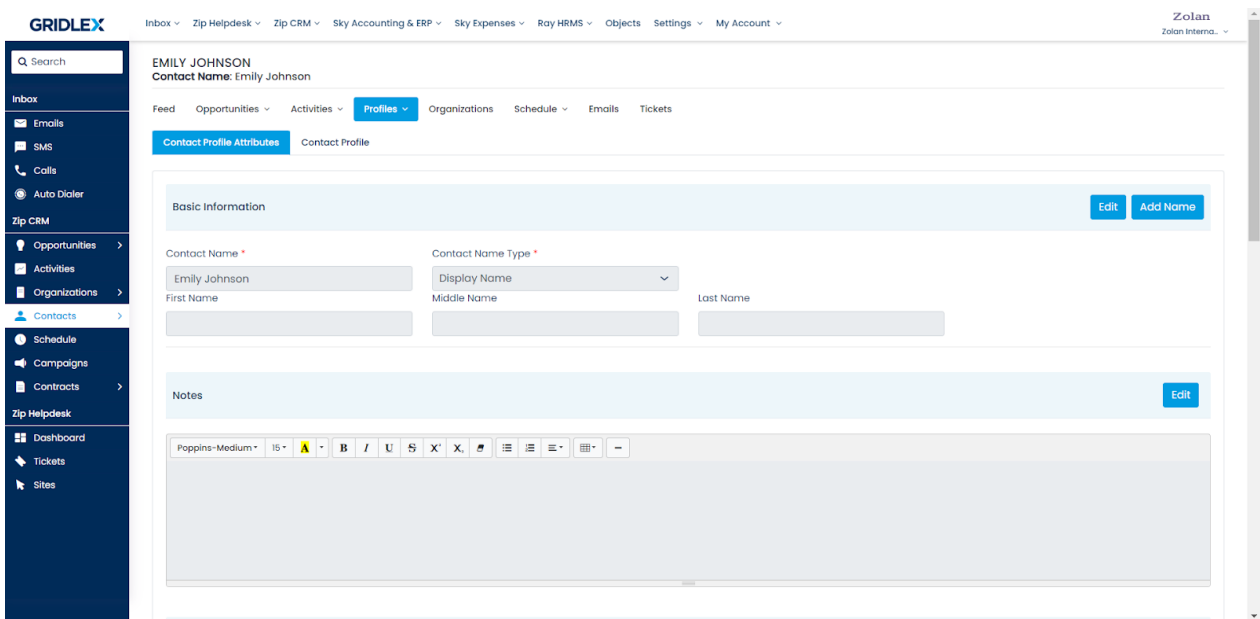
Organization Phone Number  
(201) 555-0123

Organization Phone Number Type  
+ Phone

**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](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.