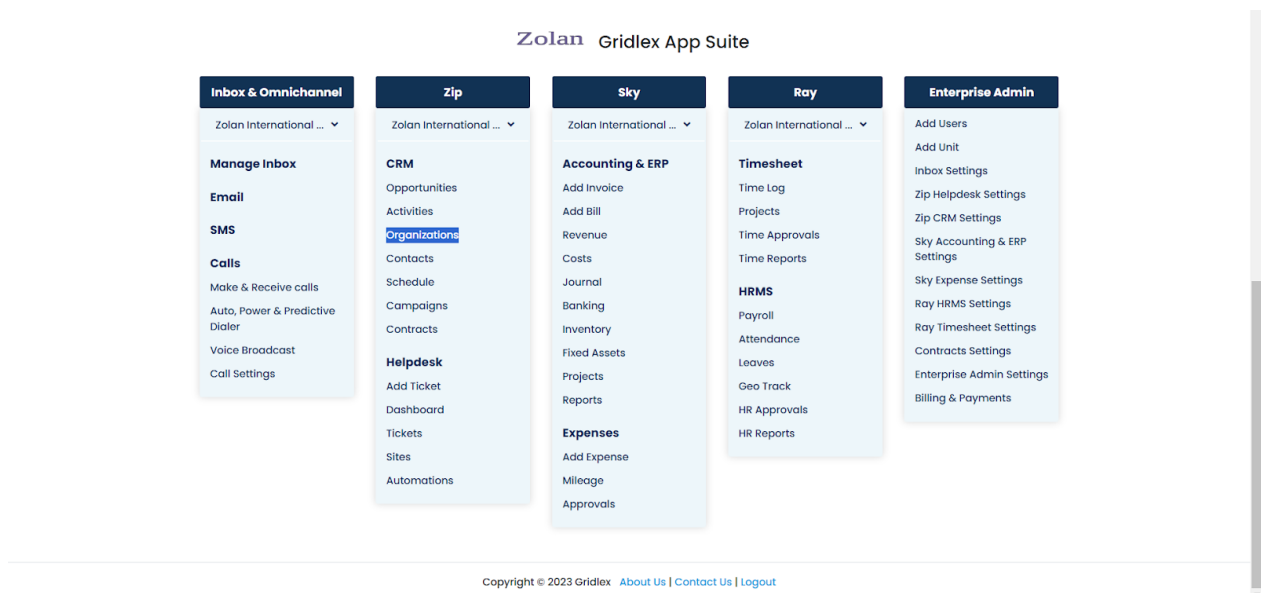


Importance: Incorporating organizations into a CRM (Customer Relationship Management) system is essential for streamlining business operations and fostering stronger customer relationships. It allows companies to maintain a structured database of all their corporate clients or partners, enabling a holistic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

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Save View

Clear Filters

Export to Excel

Organization ID	Organization Na...	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)		<div>+1-6105930520</div> <div>+1-7707047078</div> <div>+1-5622270562</div> <div>+1-7202689915</div>	
1150675548381687809	Zember Partners	Tom Sharp	6367 N,800th W 401,Wiley St	Canton	Georgia(GA)		<div>+1-6822472429</div> <div>+1-8128736867</div> <div>+1-4108965976</div> <div>+1-4047317137</div>	
1150675547454771201	General Systems	David Shaw	18410,Center St 529,Weldon Ln	Edgemont	Arkansas(AR)		<div>+1-5107330984</div> <div>+1-8709482488</div>	
11506755465529507...	United Resources	Meg Banks	9396,Cherry Tree Dr 7570,178th St	Mc Alpin	Florida(FL)		<div>+1-389633779</div> <div>+1-8653421838</div> <div>+1-2035014278</div>	
1150675545714114561	Acme Inc	Sally Smith	223,Caldwell Rd 1163,Hyacinth St	Saint Augustine	Florida(FL)		<div>+1-4233577941</div> <div>+1-9049407703</div>	
200000000000003941	John Doe Organization	John Doe, John Shore						
200000000000003927	Softland							
200000000000003926	Park Tree							
200000000000003925	Sea View							
200000000000003924	Blue Lake							
			1289 Woodland Avenue	Metairie	Louisiana	support@seaview.org	+1-9857465039	https://twitter.com/...

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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.

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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

Parent

Child

Sibling

Member

Associated

Collaborator

Joint Venture

Subsidiary

Partial Owner

Merged With

Notes

Poppins-Medium

15

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B

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X

X

Phone, Email & Social Media Details

Organization Phone Number

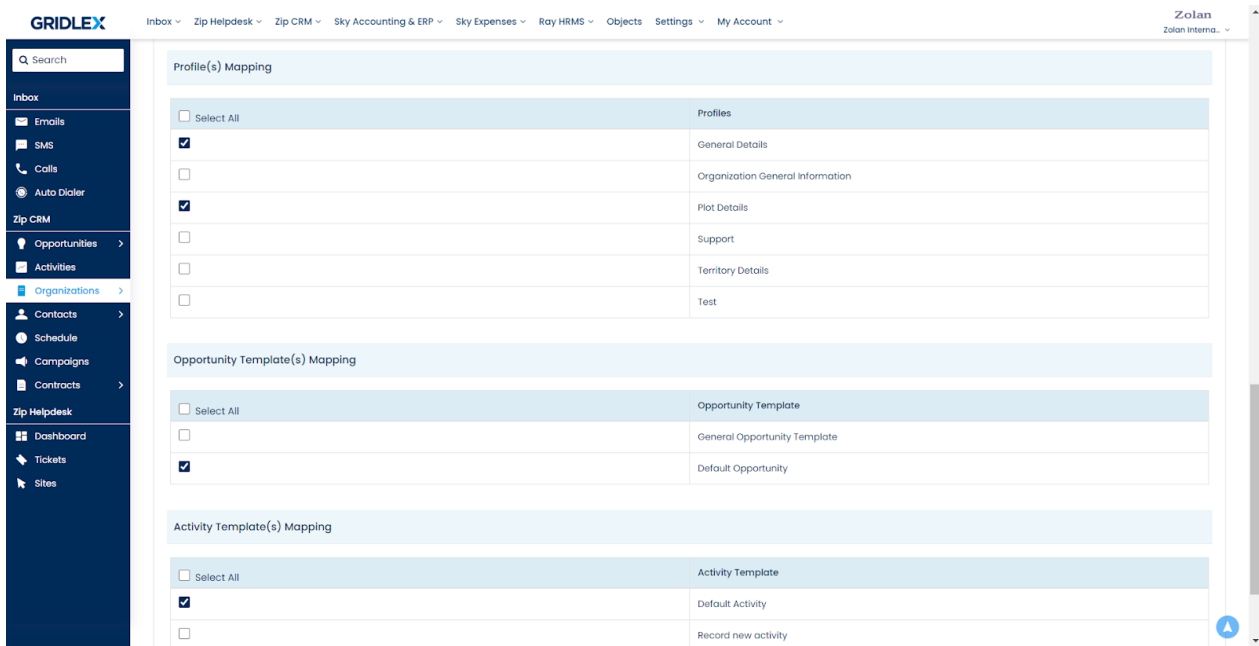
+1

(201) 555-0123

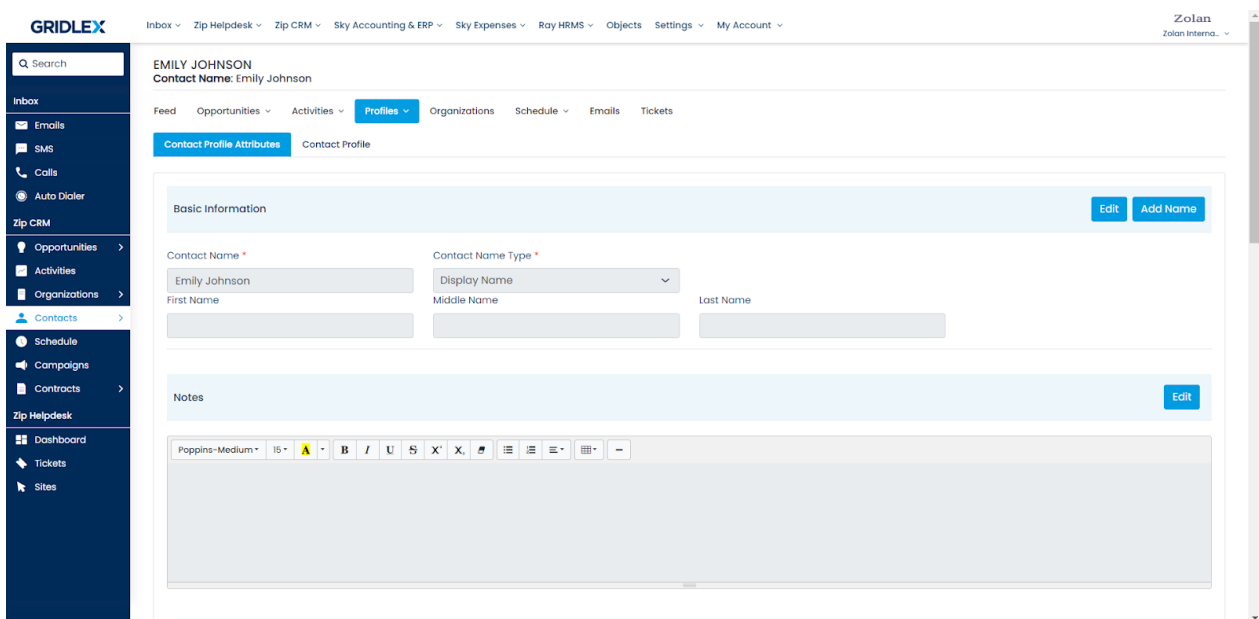
Organization Phone Number Type

+ 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 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.