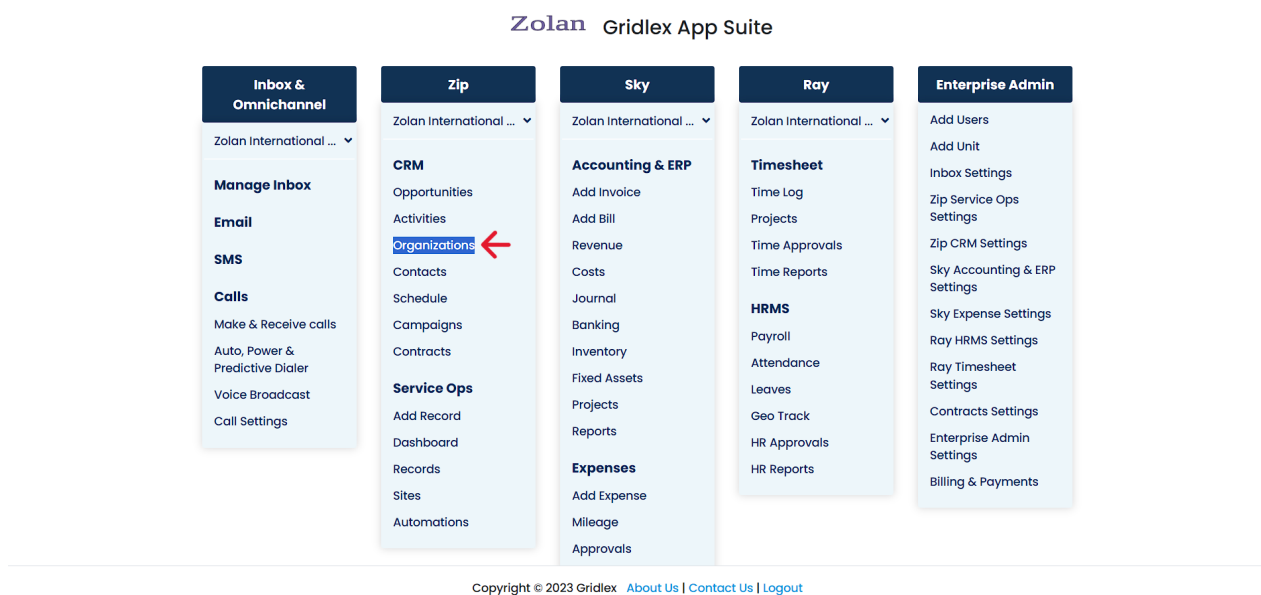


**Importance:** Incorporating organizations into a CRM (Customer Relationship Management) system is essential for streamlining business operations and fostering stronger customer relationships. It allows companies to maintain a structured database of all their corporate clients or partners, enabling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

**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 the organization you want to update and click on the edit button next to it.

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

Saved Views   Save View   Clear Filters   Export to Excel

Organization ID	Organization ...	Affiliated Cont...	All Addresses	All Towns	All States	All Emails	All Phone Num...
119337905042569...	StopGrey	DAVID MICHAEL DEN BRABER, Ruby R. Little, Orville Chnadonnet				OrvilleChnadonnet@	
1193379049813323...	Atlas Realty	Aubrey Labelle				AubreyLabelle@telev	
119337904884024...	First Choice Garden Maintenance	Musette Compagnon				MusetteCompagnon	
119337904759453...	Prestigabiz	Travers Leroy				TraversLeroy@jourra	
119337904634463...	Oranges Records & Tapes	Royale Archambault				RoyaleArchambault@	
119337904540091...	Sounds of Soul Records & Tapes	Janet J. Lee				Janet.Lee@jourrapic	
119337904478435...	MaryEShank@telewo	Mary E. Shank					
119337904382805...	Wherehouse Music	Cornelia R. Villalta				CorneliaRVillalta@dc	
1193379043177934...	Asian Answers	Lori J. Pearson				LoriJPearson@dayre	

**Step 3:** To make changes to native fields like the 'Basic Information' and 'Notes' sections, click 'Edit' next to the relevant section. Once you have made your changes, click 'Submit.'

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**ATLAS REALTY**  
Organization Name: Atlas Realty | Organization ID: 1193379049813323777

Feed   Opportunities ▾   Activities ▾   Profiles ▾   Organization Affiliations   Contacts   Schedule ▾   Emails   Records

**Organization Attributes Form**   Plot Details   General Details

Basic Information → Edit   Add Name

Organization Name \*   Organization Name Type

Atlas Realty   Display Name ▾

Notes → Edit

Poppins-Medium ▾ 15 ▾   ⚠   B   I   U   S   X'   X,   [List Icon]   [List Icon]   [List Icon]   [List Icon]

**Step 4:** In the 'Phone, Email & Social Media Details' and 'Address Details' sections, you will see two options: 'Edit' and 'Add Details.' If you want to edit the existing details, click on 'Edit,' and if you want to add new details, click on the 'Add Details' button. Once done, click 'Submit.'

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**Phone, Email & Social Media Details** → [Edit](#) [Add Details](#)

Organization Phone Number: (201) 555-0123    Organization Phone Number Type: Work ▾

Organization Email: AubreyLabelle@teleworm.us    Organization Email Type: Home ▾

Organization URL:    Organization URL Type: LinkedIn ▾

---

**Address Details** → [Edit](#) [Add Address](#)

Organization Address Type: Billing ▾

Address 1	Address 2	Address 3
City or Town 1	City or Town 2	City or Town 3
Region 1	Region 2	Region 3

IN

**Step 5:** Similarly, to map forms, opportunity templates, and activity templates, click on the 'Edit' button on the right.

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**Form(s) Mapping** → [Edit](#)

Select All	Forms
<input checked="" type="checkbox"/>	General Details
<input type="checkbox"/>	Organization General Information
<input checked="" type="checkbox"/>	Plot Details
<input type="checkbox"/>	Support
<input type="checkbox"/>	Territory Details
<input type="checkbox"/>	Test

---

**Opportunity Template(s) Mapping**

Select All	Opportunity Template
<input type="checkbox"/>	General Opportunity Template

**Step 6:** To edit the visibility section, click on 'Edit' located on the right. Update the visibility as per your preference and then click 'Submit.'

**Note: Enabling visibility here does not grant access to all users. Only those with the necessary permissions will be able to view the organization.**

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**Zip CRM**

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- Activities
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- Schedule
- Campaigns
- Contracts >

**Zip Service Ops**

- Dashboard
- Records
- Sites

---

**Activity Template(s) Mapping**

Select All	Activity Template
<input type="checkbox"/>	Default Activity
<input type="checkbox"/>	Record new activity

**Visibility** → Edit

Visible to \*

Visible to All Units     Visible to Selected Units

Zip Helpdesk Demo     Super Admin     Marketing Unit  
 Support     Dua Unit - Ray     App Marketing - Ray

→ Submit Cancel

**Step 7:** Next, to update the custom forms, in this example, 'Plot Details' and 'General Details,' go to their respective tabs and click 'Edit.'

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- Emails
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**Zip CRM**

- Opportunities >
- Activities
- Organizations >
- Contacts >
- Schedule
- Campaigns
- Contracts >

**Zip Service Ops**

- Dashboard
- Records

---

**ATLAS REALTY**  
Organization Name: Atlas Realty | Organization ID: 1193379049813323777

Feed Opportunities ▾ Activities ▾ **Profiles ▾** Organization Affiliations Contacts Schedule ▾ Emails Records

Organization Attributes Form Plot Details General Details

**Table of Contents** History Edit

**Territory Details**

Territory	District	Region
Arizona	Maricopa	Scottsdale

**Step 8:** Once done, click 'Submit.'

The screenshot displays the Gridlex Zip CRM interface. At the top, the Gridlex logo is on the left, and navigation links for 'Inbox', 'Zip Service Ops', 'Zip CRM', 'Sky Accounting & ERP', 'Sky Expenses', 'Ray HRMS', 'Objects', 'Settings', and 'My Account' are in the center. The user's name 'Zolan' and 'Zolan interna...' are on the right. A search bar is located below the logo. The left sidebar contains a menu with categories: 'Inbox' (Emails, SMS, Calls, Auto Dialer), 'Zip CRM' (Opportunities, Activities), 'Organizations' (Contacts, Schedule, Campaigns, Contracts), 'Zip Service Ops' (Dashboard, Records, Sites), and 'Sites'. The main content area shows the 'ATLAS REALTY' organization profile with 'Organization Name: Atlas Realty' and 'Organization ID: 1193379049813323777'. Below this are tabs for 'Feed', 'Opportunities', 'Activities', 'Profiles', 'Organization Affiliations', 'Contacts', 'Schedule', 'Emails', and 'Records'. Under the 'Profiles' tab, there are sub-tabs for 'Organization Attributes Form', 'Plot Details', and 'General Details', with a red arrow pointing to 'General Details'. The 'General Details' form includes a 'Table of Contents' section with a link to 'Organization Additional Information' and a 'History' button. The 'Organization Additional Information' section contains two fields: 'Network Id' with the value 'N67890' and 'Organization Type' with a dropdown menu set to 'Other'. A red arrow points down to a blue 'Submit' button at the bottom of the form.

Congratulations, you have successfully edited/updated an existing organization form 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.