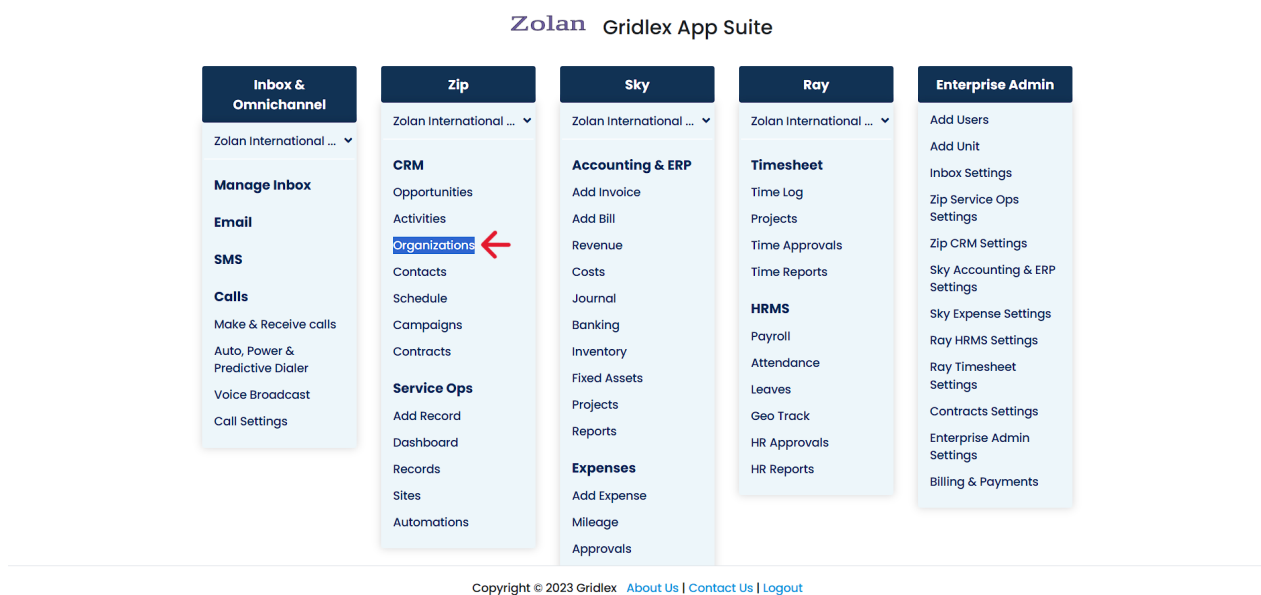


Importance: Incorporating organizations into a CRM (Customer Relationship Management) system is essential for streamlining business operations and fostering stronger customer relationships. It allows companies to maintain a structured database of all their corporate clients or partners, enabling a holistic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

GRIDLEX Inbox ▾ Zip Service Ops ▾ Zip CRM ▾ Sky Accounting & ERP ▾ Sky Expenses ▾ Ray HRMS ▾ Objects Settings ▾ My Account ▾ **Zolan**
Zolan Internat...

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 ... | 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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Search

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 A B I U S X' X [List Icons]

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.'

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 |

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

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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Search

Inbox

- Emails
- SMS
- Calls
- Auto Dialer

Zip CRM

- Opportunities >
- Activities
- Organizations >
- Contacts >
- 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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Search

Inbox

- Emails
- SMS
- Calls
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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

[Territory Details](#)

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 the 'General Details' tab. 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 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.