

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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Add Organizations From Master Data

Map Organizations to Units

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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				JanetJLee@jourrapic	
119337904478435...	MaryEShank@telewo	Mary E. Shank					
119337904382805...	Wherehouse Music	Cornelia R. Villalta				CorneliaRVillalta@dc	
119337904317793...	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

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Organization Attributes Form

Plot Details

General Details

Basic Information

Organization Name *

Atlas Realty

Organization Name Type

Display Name

Notes

Poppins-Medium

15

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X

X

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 Organization Phone Number Type

Organization Email Organization Email Type

Organization URL Organization URL Type

Address Details → Edit Add Address

Organization Address Type

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.

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Form(s) Mapping → Edit

<input type="checkbox"/> 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

<input type="checkbox"/> 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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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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ATLAS REALTY
Organization Name: Atlas Realty | Organization ID: 1193379049813323777

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Organization Attributes Form → Plot Details General Details

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[Territory Details](#)

History Edit

Territory Details

Territory	District	Region
Arizona	Maricopa	Scottsdale

Step 8: Once done, click 'Submit.'

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Organization Attributes Form Plot Details General Details

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Organization Additional Information

History

Organization Additional Information

Network Id

Organization Type

N67890

Other ▾

Submit

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.