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.

Inbox & Omnichannel	Zip	Sky	Ray	Enterprise Admin
Omnichannei	Zolan International 🗸	Zolan International 🗸	Zolan International 🗸	Add Users
Zolan International 👻				Add Unit
	CRM	Accounting & ERP	Timesheet	Inbox Settings
Manage Inbox	Opportunities	Add Invoice	Time Log	Zip Service Ops
Email	Activities	Add Bill	Projects	Settings
	Organizations	Revenue	Time Approvals	Zip CRM Settings
SMS	Contacts	Costs	Time Reports	Sky Accounting & ERP Settings
Calls	Schedule	Journal	HRMS	Sky Expense Settings
Make & Receive calls	Campaigns	Banking	Payroll	Ray HRMS Settings
Auto, Power &	Contracts	Inventory	Attendance	, ,
Predictive Dialer	Service Ops	Fixed Assets	Leaves	Ray Timesheet Settings
Voice Broadcast	Add Record	Projects	Geo Track	Contracts Settings
Call Settings	Dashboard	Reports	HR Approvals	Enterprise Admin
	Records	Expenses	HR Reports	Settings
	Sites	Add Expense		Billing & Payments
	Automations	Mileage		

Zolan Gridlex App Suite

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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 ~ Si	xy Accounting & ERP ~	Sky Expenses ~ Ra	y HRMS ~ Obje	cts Settings ~ M	1у Ассон	unt v	Zolan Zolan Interna v
Q Search	Organizations A	dd Organizations A	dd Organizations Fron	n Master Data Map	Organizations to	Units			
Inbox	Saved Views			∽ Save View	Clear Filters	Export to Excel			
🖂 Emails	Occurring ID .				All T-1100			All Emgils	All Phone Num
📖 SMS	Organization ID	Organization	Affiliated Cont	All Addresses	All Towns	: All States	:	All Emails :	All Phone Num :
📞 Calls	119337905042569	DE	DAVID MICHAEL DEN BRABER, Ruby					OrvilleChnadonnet@	
Auto Dialer	119337905042569	StopGrey 🗹	R. Little, Orville Chnadonnet					OrvilleChnddonnet@	
Zip CRM	1193379049813323	Atlas Realty 🗹 🗲	Aubrey Labelle					AubreyLabelle@telev	
Opportunities >		First Choice	Musette						
Z Activities	119337904884024	Garden Maintenance 🗹	Compagnon					MusetteCompagnon	
Organizations >	119337904759453	Prestigabiz 📝	Travers Leroy					TraversLeroy@jourra	
Contacts >	119337904634463	Oranges Records	Royale					RoyaleArchambault@	
🕔 Schedule	119337904034403	& Tapes 🗹	Archambault					RoyaleArchambaulte	
┥ Campaigns	119337904540091	Sounds of Soul Records & Tapes	Janet J. Lee					JanetJLee@jourrapic	
Contracts >	110007004040001		Suner S. Lee					Junetatee@joundpic	
Zip Service Ops	119337904478435	MaryEShank@telewo	Mary E. Shank						
Dashboard		Wherehouse Music							
🔖 Records	119337904382805	ß	Cornelia R. Villalta					CorneliaRVillalta@dc	
🔭 Sites	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.'

GRIDLEX	Inbox v Zip Service Ops v Zip CRM v Sky Accounting & ERP v Sky Expenses v Ray HRMS v Objects Settings v My Account v Zolan Interr	
Q Search	ATLAS REALTY Organization Name: Atlas Realty Organization ID: 1193379049813323777	
Inbox	Feed Opportunities - Activities - Profiles - Organization Affiliations Contacts Schedule - Emails Records	
😁 Emails		
💴 SMS	Organization Attributes Form Plot Details General Details	
📞 Calls		
💿 Auto Dialer	Basic Information \longrightarrow Edit Add Name	
Zip CRM		
♀ Opportunities >	Organization Name * Organization Name Type	
Activities	Atlas Realty Display Name 🗸	
Organizations >		
Contacts >	Notes	
🕔 Schedule		
┥ Campaigns	Poppins-Medium \cdot 15 \cdot A \cdot B <i>I</i> U S X ² X , B \equiv \equiv \equiv \equiv $=$ \equiv $=$ $=$	
Contracts >		
Zip Service Ops		
Dashboard		
🔶 Records		
Sites		

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.'

GRIDLEX	Inbox ~ Zip Service Ops ~ Zip CRM ~ S	ky Accounting & ERP ~	Sky Expenses ~ Ray HRM	S ~ Objects Setting	is 👻 My Account 🗸	Zolan Zolan Interna v
Q Search	Phone, Email & Social Media Detai	ls			\rightarrow	Edit Add Details
Inbox	Organization Phone Number	Organization Phone	Number Type			
🗠 Emails	■ • (201) 555-0123	Work	~			
💴 SMS	Organization Email	Organization Email	Туре			
📞 Calls	AubreyLabelle@teleworm.us	Home	~			
O Auto Dialer	Organization URL	Organization URL Ty	rpe			
Zip CRM		LinkedIn	~			
Opportunities >						
🔀 Activities	Address Details				<u> </u>	Edit Add Address
Organizations >						
Contacts >	Organization Address Type					
🕓 Schedule	Billing	~				
┥ Campaigns	Address 1	Addre	ess 2		Address 3	
Contracts						
Zip Service Ops	City or Town 1	City c	or Town 2		City or Town 3	
Dashboard						
🔷 Records	Region 1	Regic	in 2		Region 3	
Sites	IN					<u> </u>

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

GRIDLEX	Inbox × Zip Service Ops × Zip CRM × Sky Accounting & ERP × Sky Expenses × Ray HRMS × Objects Settings × My Account × Zola Zolan Inter
Q Search	
Inbox	Form(s) Mapping
🗠 Emails	
SMS	Select All
📞 Calls	General Details
Auto Dialer	Organization General Information
Zip CRM	Plot Details
Opportunities >	
Z Activities	Support
Organizations >	Territory Details
Contacts >	Test
🕔 Schedule	
┥ Campaigns	
Contracts >	Opportunity Template(s) Mapping
Zip Service Ops	
Dashboard	Select All Opportunity Template
Records	General Opportunity Template
Sites	

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.

GRIDLEX	Inbox V Zip Service Ops V Zip CRM V Sky Accounting &	🕯 ERP 🗸 Sky Expenses 🗸 Ray	y HRMS ~ Objects Sett	ings ~ My Account ~	Zolan Zolan Interna ~
Q Search					
Inbox	Activity Template(s) Mapping				
🖂 Emails					
SMS	Select All		Activity Template		
📞 Calls			Default Activity		
O Auto Dialer			Record new activity		
Zip CRM					
Opportunities >	Visibility				> Edit
Z Activities					
Organizations >					
Contacts >	Visible to * Visible to All Units Visible to Selected Units				
🕔 Schedule					
┥ Campaigns	🗌 Zip Helpdesk Demo	Super Admin		Marketing Unit	
Contracts >	Support	🗌 Dua Unit - Ray		App Marketing - Ray	
Zip Service Ops		\ 			
- Dashboard		Submit	Cancel		
🔶 Records					•
Sites					

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

GRIDLEX	Inbox v Zip Service Ops v Zip CRM v Sky Accounting &	ERP 🗸 Sky Expenses 🗸 Ray HRMS 🗸 Objects Setti	ngs 🗸 My Account 🗸	Zolan Zolan Interna v
Q Search	ATLAS REALTY Organization Name: Atlas Realty Organization ID: 11	93379049813323777		
Inbox	Feed Opportunities < Activities < Profiles <	Organization Affiliations Contacts Schedule ~	Emails Records	
🗠 Emails	Total opportunities a Advised a			
💴 SMS	Organization Attributes Form Plot Details General	I Details		
📞 Calls				
🕓 Auto Dialer	Table of Contents			
Zip CRM	Territory Details			
Opportunities >				History 🕼 Edit
🖂 Activities				
Organizations >	Tamitany Dataila			
Contacts >	Territory Details			
🕔 Schedule	Territory	District	Region	
┥ Campaigns	Arizona	Maricopa	Scottsdale	
Contracts >				
Zip Service Ops				
Dashboard				
Records				

Step 8: Once done, click 'Submit.'

GRIDLEX	Inbox ~ Zip Service Ops ~ Zip CRM ~ Sky Accounting & ER	IP × Sky Expenses × Ray HRMS × Objects Settings × My Account ×	Zolan Zolan Interna ~
Q Search	ATLAS REALTY Organization Name: Atlas Realty Organization ID: 1193	379049813323777	
Inbox	Feed Opportunities < Activities < Profiles < O	rganization Affiliations Contacts Schedule -> Emails Records	
🖂 Emails			
💴 SMS	Organization Attributes Form Plot Details General D	etails 🧲	
📞 Calls			
O Auto Dialer	Table of Contents		
Zip CRM	Organization Additional Information		
Opportunities >			History
Z Activities			Thistory
Organizations >	Organization Additional Information		
▲ Contacts >	Organization Additional Information		
🕔 Schedule	Network Id	Organization Type	
┥ Campaigns	N67890	Other ~	
Contracts			
Zip Service Ops			
Dashboard			
🔷 Records		Submit	
Sites		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 <u>apps@gridlex.com</u> 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.