

Welcome to our comprehensive guide on searching for an organization or contact in Gridlex Zip.

This guide is dedicated to efficiently locating Organizations and Contacts within our system. By the end of this tutorial, you'll be adept at navigating and retrieving the specific data you need, optimizing your CRM experience.

How to Search for an Organization in Gridlex Zip?

Step 1: Log in to Gridlex App Suite and click " Organizations " under the Zip section in the navigation menu.

You'll now be taken to the Organizations Listing Page. You can search for an organization using the "Filter" feature here. See the following steps:

Step 2: Click on the three dots menu on the column where you want to search for an organization.

Note: To demonstrate, we will search for the organization's name. You can search for any detail of the organization you want to find; just choose the desired column.

Step 3: Click "Filter."

Step 4: Click on the dropdown.

Step 5: Select a search criteria.

Step 6: Enter your keyword in the search field.

Step 7: Click "Filter."

You'll see that the organization with the keyword has appeared on the screen.

How to Search for a Contact in Gridlex Zip?

Step 8: Log in to Gridlex App Suite and click " Contacts " under the Zip section in the navigation menu.

You'll now be taken to the Contacts Listing Page. You can search for a contact using the "Filter" feature. See the following steps:

Step 9: Click on the three dots menu on the column where you want to search for a contact.

Note: To demonstrate, we will search for the contact name. You can search for any detail of the contact you want to find; just choose the desired column.

Step 10: Click "Filter."

Step 11: Click on the dropdown.

Step 12: Select a search criteria.

Step 13: Enter your keyword in the search field.

Step 14: Click “Filter.”

You’ll see that the contact with the keyword has appeared on the screen.

Congratulations! You have learned to search for an organization or contact 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.