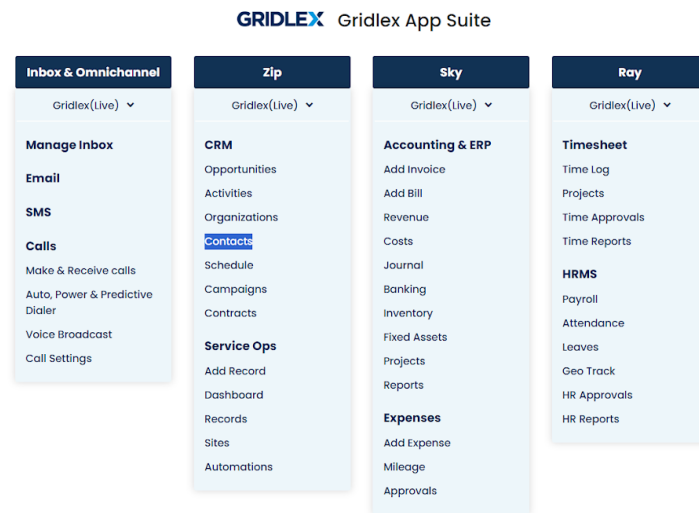


In Gridlex Zip, there are multiple ways to add contacts: manually, by importing, or through the organization page. This guide will specifically explain the process of adding multiple contacts by importing contacts in the system.

Step 1: Log in to the Gridlex App Suite and click on 'Contacts' located under the Zip section.



Step 2: After clicking on "Contacts," you will be redirected to the contacts page. Look for the "Add Contacts" option on the top navigation bar and click on it.

Note: The availability of this feature depends on your assigned permissions. If you don't have the permission to view or add contacts, you'll be unable to do so. To obtain access, please reach out to your enterprise admin.

GRIDLEX

Inbox

Zip Service Ops

Zip CRM

Sky Accounting & ERP

Sky Expenses

Ray HRMS

Objects

Settings

My Account

Zolan

Zolan Interna...

Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Zip Service Ops

Dashboard

Records

Sites

Contacts

Add Contacts

Add Contact From Gridlex Databases

Add Contacts From Master Data

Map Contacts to Units

Saved Views

Save View

Clear Filters

Export to Excel

Power Dial

Predictive Dial

Contact ID	Contact Name	Affiliated Orga...	All Addresses	All Towns	All States	All Emails	All Phone Num...	All Website Lin...
120429345641626...	BARBARA JANE COVEN	True Health	210 WESTCHESTER AVE, 210 WESTCHESTER AVE	WHITE PLAINS	NY		9146820731	
120428898700369...	Vanessa Jones	True Health	463,Organization Main St					
1204281994327158...	JOHN F MOORE		740 EAST STATE ST, 740 EAST STATE ST	SHARON	PA		7249833911	
1204273187010203...	Brandon Brown	Vader Life Sciences						
120426672564713...	Brandon Brown	True Health						
1194131562053320...	Nihal Mohammed					nihal@gridlex.com		
1194130557710458...	Zolan Support					support@zolan.gridl		
1193760174230548...	DAVID MICHAEL DEN BRABER		750 E BELTLINE AVE NE, 750 E BELTLINE AVE NE	GRAND RAPIDS	MI		6169492600	
1193732793197481...	Ruby R. Little					RubyRLittle@jourrap	+1-267-291-8471	
119337905057249...	Orville Chnadonnet							

Step 3: On the "Add Contacts" page, you will see an option to "Import" contacts. Click on the "Import" button to initiate the import process. Before proceeding, you can download the sample file to understand the format that is supported by the system.

GRIDLEX

Inbox

Zip Service Ops

Zip CRM

Sky Accounting & ERP

Sky Expenses

Ray HRMS

Objects

Settings

My Account

Zolan

Zolan Interna...

Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Zip Service Ops

Dashboard

Records

Sites

Contacts

Add Contacts

Add Contact From Gridlex Databases

Add Contacts From Master Data

Map Contacts to Units

Add New Contact

Import

Previous File Imports

Import Logs

Import New Organizations and Contacts

1: Upload

2: Mapping

3: Finish

Upload File

Download sample file

Choose file

No file chosen

Upload

Note: Maximum file size: 2 MB for CSV, XLS, XLSX

Step 4: Once you have downloaded the sample file, review its format to ensure your data aligns with the system's requirements. For example, here you can view the data:

	A	B	C	D	E	F
1	Contact Name	Contact Email	Contact Number	City	Country	
2	Shawn	Mendes	4233577941	Wyoming	US	
3	Dua	Murphy	3896337795	Wyoming	US	
4						
5						
6						
7						
8						

Step 5: Choose the file with your contacts and upload it to the system. The time taken for the upload will depend on the number of contacts being imported. Map the fields in your spreadsheet to corresponding fields in the system. For example, map the "City" field to "Contact Home City or Town 1" in the system. Click on the "Map" button after mapping is complete.

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

Inbox
 Emails
 SMS
 Calls
 Auto Dialer
 Zip CRM
 Opportunities >
 Activities
 Organizations >
 Contacts >
 Schedule
 Campaigns
 Contracts >
 Zip Service Ops
 Dashboard
 Records
 Sites

Contacts

Add New Contact **Import** Previous File Imports Import Logs

Import New Organizations and Contacts (File Name : Sample Data - Contacts.xlsx)

```

graph LR
    A((1)) --> B((2)) --> C((3))
    style A stroke:#003366,color:#fff
    style B stroke:#003366,color:#fff
    style C stroke:#ccc,color:#ccc
          
```

Imported file columns	Template columns
Contact Name	<input type="text" value="Contact Name"/>
Contact Email	<input type="text" value="Contact Work Email 1"/>
Contact Number	<input type="text" value="Contact Mobile Phone Number 1"/>
City	<input type="text" value="Contact Home City or Town 1"/>
Country	<input type="text" value="Contact Country"/>

Map

Step 6: After a successful upload, you will receive a notification confirming the completion to your registered email address. Once the contacts are uploaded and mapped, you can view the data on the screen. Click on the "Details" link at the end of each column to view more information about the contacts.

GRIDLEX

Inbox

Zip Service Ops

Zip CRM

Sky Accounting & ERP

Sky Expenses

Ray HRMS

Objects

Settings

My Account

Zolan

Zolan Intern...

Q Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Zip Service Ops

Dashboard

Records

Sites

Contacts

Add Contacts

Add Contact From Gridlex Databases

Add Contacts From Master Data

Map Contacts to Units

Add New Contact

Import

Previous File Imports

Import Logs

Date	File Name	Created	Updated	Failed	Skipped	
Oct. 4, 2023, 8:21 a.m.	Sample Data - Contacts.xlsx	2	0	0	0	Details
Sept. 4, 2023, 4:21 a.m.	Organizations Demo Data.xlsx	20	0	0	0	Details
Aug. 22, 2023, 5:37 a.m.	Navya_contacts.xlsx	2	0	0	0	Details
Aug. 18, 2023, 9:19 a.m.	Navya_contacts.xlsx	3	0	0	0	Details
Aug. 18, 2023, 9:18 a.m.	Navya_contacts.xlsx	3	0	0	0	Details
Aug. 18, 2023, 9:17 a.m.	Navya_contacts.xlsx	3	0	0	0	Details
Aug. 18, 2023, 7:55 a.m.	Tejaswini_contacts.xlsx	2	0	0	0	Details
July 24, 2023, 7:44 a.m.	Unit-Contact Mapping.xlsx	0	2	0	0	Details
July 24, 2023, 7:10 a.m.	Sample Data - Contacts.xlsx	2	0	0	0	Details
July 18, 2023, 8:19 a.m.	Contacts_Sheet_Enterprise_Zolan_Entity_Zolan International Entity_July_18_2023.xlsx	0	14	0	0	Details
July 18, 2023, 8 a.m.	Tejaswini_contacts.xlsx	2	0	0	0	Details
May 17, 2023, 2:07 a.m.	Contacts sample_UPDATED.xlsx	1	0	0	0	Details

Step 7: Click on "View Data" to see the contacts that have been successfully uploaded into the system.

GRIDLEX

Inbox

Zip Service Ops

Zip CRM

Sky Accounting & ERP

Sky Expenses

Ray HRMS

Objects

Settings

My Account

Zolan

Zolan Intern...

Q Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Zip Service Ops

Dashboard

Records

Sites

Contacts

Add Contacts

Add Contact From Gridlex Databases

Add Contacts From Master Data

Map Contacts to Units

Add New Contact

Import

Previous File Imports

Import Logs

File Name : Sample Data - Contacts.xlsx

File Import Logs

File Import Details

2 Contact(s) created

[View Data](#)

By following the above steps, you'll have imported your contacts into Gridlex Zip efficiently.

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.

