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 imporoting contacts in the system.

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

Inbox & Omnichannel	Zip	Sky	Ray
Gridlex(Live) 🗸	Gridlex(Live) 🗸	Gridlex(Live) 🗸	Gridlex(Live) 🗸
Manage Inbox	CRM	Accounting & ERP	Timesheet
Email	Opportunities	Add Invoice	Time Log
	Activities	Add Bill	Projects
SMS	Organizations	Revenue	Time Approvals
Calls	Contacts	Costs	Time Reports
Make & Receive calls	Schedule	Journal	HRMS
Auto, Power & Predictive	Campaigns	Banking	Payroll
Dialer	Contracts	Inventory	Attendance
Voice Broadcast	Service Ops	Fixed Assets Projects	Attendance Leaves Geo Track
Call Settings			
	Dashboard	Reports	HR Approvals
	Records	Expenses	HR Reports
	Sites	Add Expense	in noporto
	Automations	Mileage	
	Automations	Approvals	
		Approvais	

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 ∽ S	sky Accounting & ERP ~	Sky Expenses ~ Ra	y HRMS ~ Obje	cts Settings ~	Му Ассо	unt ~		Zolan Zolan Interna.
Q Search	Contacts Add C	contacts Add Conto	act From Gridlex Datab	ases Add Contacts	From Master Date	a Map Contac	s to Units			
Inbox	Saved Views			∽ Save View	Clear Filters	Export to Exce	4		© Power Di	al 🔘 Predictive Dial
ビ Emails	Contact ID :	Contact Name	Affiliated Orga	All Addresses :	All Towns	: All States	:	All Emails	All Phone Num	All Website Lin
Calls	120429345641626	BARBARA JANE COVEN 🗹	True Health	210 WESTCHESTER AVE, 210 WESTCHESTER AVE	WHITE PLAINS	NY			⊡- 9146820731	
Zip CRM	120428898700369	Vanessa Jones 📝	True Health	463,Organization Main St						
Opportunities > Activities	1204281994327158	JOHN F MOORE 📝		740 EAST STATE ST, 740 EAST STATE ST	SHARON	РА			U -7249833911	
Organizations >	1204273187010203	Brandon Brown 🗹	Vader Life Sciences							
Contacts >	120426672564713	Brandon Brown 📝	True Health							
🕔 Schedule	1194131562053320	Nihal Mohammed						nihal@gridlex.com		
Contracts	1194130557710458	Zolan Support 🗹						support@zolan.gridl	e .	
Zip Service Ops	1193760174230548	DAVID MICHAEL DEN BRABER		750 E BELTLINE AVE NE, 750 E BELTLINE	GRAND RAPIDS	м			L -6169492600	
Dashboard		Serrolander E		AVE NE						
Records	1193732793197481	Ruby R. Little 📝						RubyRLittle@jourrap	■+1-267-291- 8471-	
🔭 Sites	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 V
Q Search	Contacts Add Contacts From Gridlex Databases Add Contacts From Master Data Map Contacts to Units	
Inbox	Add New Contact Import Previous File Imports Import Logs	
🖂 Emails	Import New Organizations and Contacts	
SMS	import wew organizations and contacts	
📞 Calls		
Auto Dialer	(2) (3) 1: Upload 2: Mapping 3: Finish	
Zip CRM	1: Upload 2: Mapping 3: Finish	
Opportunities >	\checkmark	
Activities	Upload File (Download sample file)	
Organizations >	Choose file chosen Upload	
Contacts >	Note: Maximum file size: 2 MB for CSV, XLS, XLSX	
🕔 Schedule		
Campaigns		
Contracts >		
Zip Service Ops		
- Dashboard		
Records		
🖹 Sites		

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	В	С	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.

GRIDLEX	Inbox ~ Zip Service Ops ~ Zip CRM ~ Sky Accounting & ERP ~ Sky Expense	es v Ray HRMS v Objects Settings v My Account v	Zolan Zolan Interna. V
Q Search	Contacts Add Contacts Add Contact From Gridlex Databases Add	Contacts From Master Data Map Contacts to Units	
Inbox	Add New Contact Import Previous File Imports Import Logs		
😐 SMS	Import New Organizations and Contacts (File Name : Sample Data - C	Contacts.xlsx)	
📞 Calls			
Auto Dialer	I: Upload	2 2: Mapping	3) 3: Finish
Zip CRM	i: Opioda	2: mapping	3: FINISH
♀ Opportunities >			
Activities	Imported file columns	Template columns	<u>^</u>
Organizations >	Contact Name	Contact Name	
Contacts >	Condername	Contact Name	
 Schedule Campaigns 	Contact Email	Contact Work Email 1	•
Contracts	Contact Number	Contact Mobile Phone Number 1	•
Zip Service Ops	City	Contact Home City or Town 1	
Dashboard			
🔷 Records	Country	Contact Country	• •
🔭 Sites			÷
		Мар	

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 🗸						
Q Search	Contacts Add Contacts A	dd Contact From Gridlex Databases Add Contacts From Master Data Map Contacts to Units					
Inbox Emails	Add New Contact Import	Previous File Import Logs					
SMS	Date	File Name	Created	Updated	Failed	Skipped	\mathbf{J}
Calls	Oct. 4, 2023, 8:21 a.m.	Sample Data - Contacts.xlsx	2	0	0	0	Details
Auto Dialer Zip CRM	Sept. 4, 2023, 4:21 a.m.	Organizations Demo Data.xlsx	20	0	0	0	Details
Opportunities >	Aug. 22, 2023, 5:37 a.m.	Navya_contacts.xlsx	2	0	0	0	Details
Activities	Aug. 18, 2023, 9:19 a.m.	Navya_contacts.xlsx		0	0	0	Details
<pre>Organizations > Contacts ></pre>	Aug. 18, 2023, 9:18 a.m.	Navya_contacts.xlsx		0	0	0	Details
Schedule	Aug. 18, 2023, 9:17 a.m.	Navya_contacts.xlsx		0	0	0	Details
┥ Campaigns	Aug. 18, 2023, 7:55 a.m.	Tejaswini_contacts.xlsx		0	0	0	Details
Contracts >	July 24, 2023, 7:44 a.m.	Unit-Contact Mapping.xlsx	0	2	0	0	Details
Zip Service Ops	July 24, 2023, 7:10 a.m.	Sample Data - Contacts.xlsx	2	0	0	0	Details
 Records 	July 18, 2023, 8:19 a.m.	Contacts_Sheet_Enterprise_Zolan_Entity_Zolan International Entity_July_18_2023.xlsx	0	14	0	0	Details
🕞 Sites	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 Accounti	ing & ERP × Sky Expenses × Ray HRMS × Objects Settings × My Accour	it v	Zolan Zolan interna v
Q Search	Contacts Add Contacts Add Contact From Gri	idlex Databases Add Contacts From Master Data Map Contacts to Units		
Inbox	Add New Contact Import Previous File Imports	Import Logs		
🖂 Emails			_	
SMS	File Name : Sample Data - Contacts.xlsx			File Import Logs
📞 Calls				
S Auto Dialer		File Import Details	1	
Zip CRM	0	2 Contact(s) created	View Data	
Opportunities >	0			
Z Activities				
Organizations >				
Contacts >				
Schedule				
┥ Campaigns				
Contracts >				
Zip Service Ops				
Dashboard				
Records				
Sites				

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 <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.