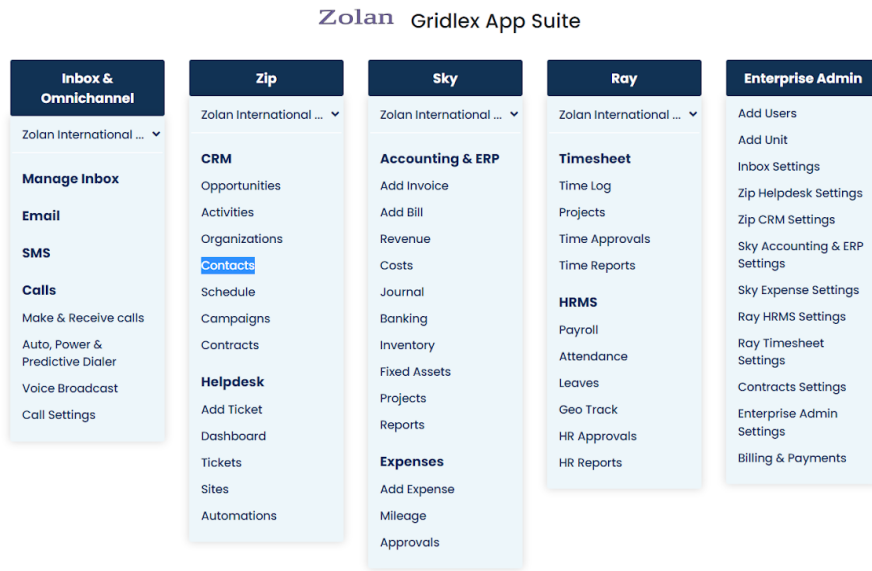


This guide will walk you through the process of importing contacts and creating a saved view in Gridlex Zip.

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



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.

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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...
117603806906186...	G Tejaswini						+91-8919777052
117603806856275...	D Nagendra						+91-9916896766
116333743986001...	+13052248890						+1-3052248890
1158986938750119...	Emmy Watson		Madrid		Madrid		+1-202-555-0194
100000000000036...	Dan Camp	Thesis Corporation	2004 Williams Road, Suite 86	Boston	Massachusetts	danielhcamp@gmail.com	+1-6177759109
100000000000036...	Bob Wilson	Thesis Corporation	1164 County Line Road	Tampa	Florida	Bobwilson@gmail.com	+1-7278106416
100000000000036...	YURI A SAITO LOFTUS	Thesis Corporation	200 1ST ST SW, 200 1ST ST SW	ROCHESTER	MN	yurisiotus@gmail.com	+1-5072842511
100000000000036...	Himanshu's Personal						+1-2678154512
100000000000036...	Craig Law	Thesis Corporation	1922 Ingram Road	Greensboro	North Carolina	Craiglaw@gmail.com	+1-3366212130
100000000000036...	Nancy Baker	Thesis Corporation	55 Rocco Grande Blvd	Los Angeles	California	nbaker23@gmail.com	+1-2015990117
100000000000036...	Chris Young	Thesis Corporation					
100000000000036...	David Wilson	Thesis Corporation	15685 North 33 Ave	Nashville	Tennessee	dwilsontr@gmail.com	+1-4048431295

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.

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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 view.

	A	B	C	D	E	F	G	H	I
1	Contact name	Contact Email	Contact Number	City	Country				
2	Shawn	Mendes	+1 4233577941	Wyoming	US				
3	Dua	Murphy	389633779	Wyoming	US				
4									
5									
6									
7									
8									
9									
10									
11									

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 the 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.

The screenshot shows the Gridlex CRM interface. At the top, there is a navigation bar with various menu items like 'Inbox', 'Zip Helpdesk', 'Zip CRM', etc. The main content area is titled 'Contacts' and includes a search bar and several action buttons: 'Add Contacts', 'Add Contact From Gridlex Databases', 'Add Contacts From Master Data', and 'Map Contacts to Units'. Below this, there is a section for 'Import New Organizations and Contacts' with a progress indicator showing three steps: 1: Upload (completed), 2: Mapping (current step), and 3: Finish. The mapping table below shows the following columns and their corresponding system fields:

Imported file columns	Template columns
Contact name	Contact Name
Contact Email	Contact Work Email 1
Contact Number	Contact Mobile Phone Number 1
City	Contact Home City or Town 1
Country	Contact Country

At the bottom of the mapping section, there is a blue 'Map' button.

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.

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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**

1: Upload 2: Mapping 3: Finish

"We are processing your file. We will send you an email once this is completed and will also update this Import Logs page with the relevant details."

You can also go the "Add Contact" that you originally came from

Date	File Name	Created	Updated	Failed	Skipped	
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
May 10, 2023, 3:40 a.m.	Contacts_Sample.xlsx	1	0	0	0	Details
May 10, 2023, 3:39 a.m.	Contacts_Sample.xlsx	1	0	0	0	Details
May 9, 2023, 8:18 a.m.	Organization_and_Contact_Sample.csv	10	0	0	0	Details

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

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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](#)

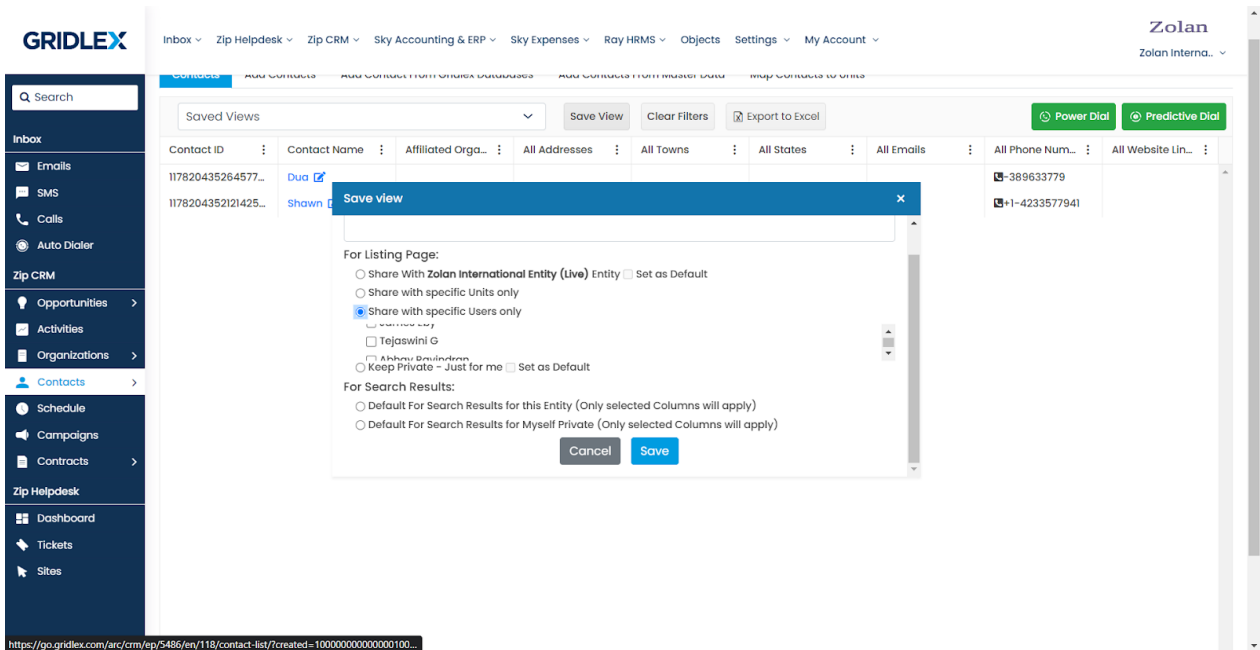
File Import Details

2 Contact(s) created [View Data](#)

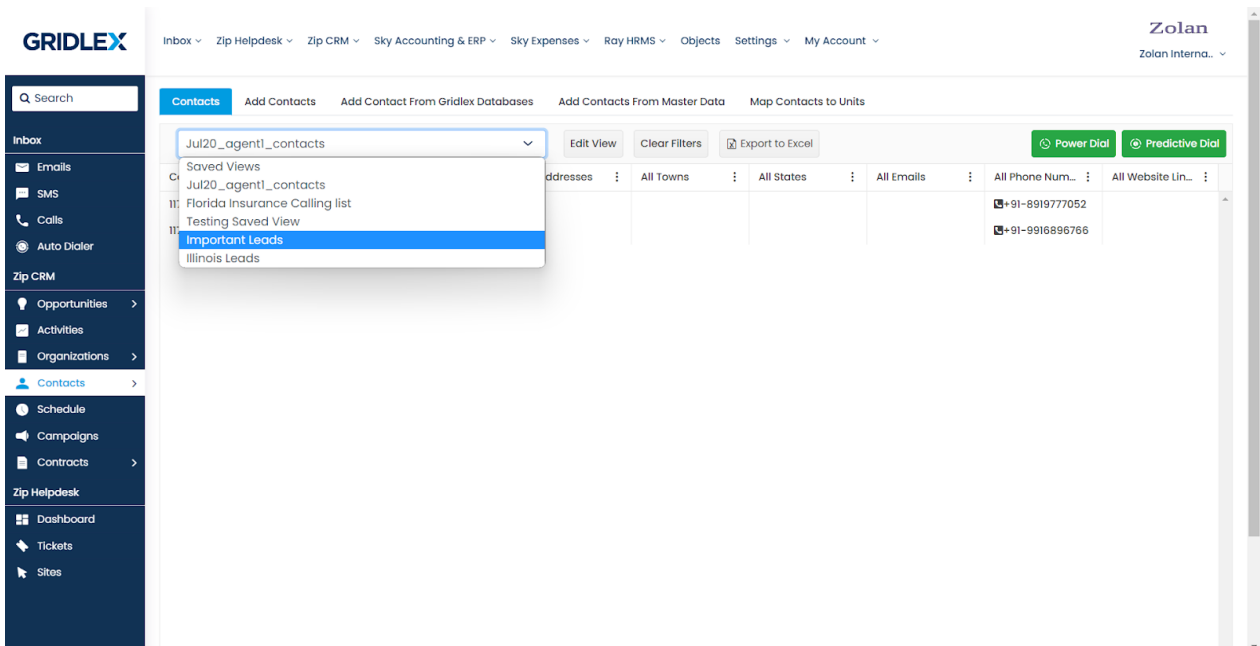
<https://go.gridlex.com/arc/crm/ep/5486/en/118/contact-list/?created=100000000000001008>

Step 8: To create a saved view, click on "Save View" located on the page. Check the box "Share with specific users only" to restrict access to selected users. Select the user(s) you wish to share the saved view with. Click on the "Save" button to create the saved view.

Note: If you want to share the list with specific units, you can click on "Share with specific units only."



Step 9: To access your saved view, navigate to the "Saved Views" section. Locate and select the name of the saved view from the list.



Congratulations! You have successfully imported contacts and created a saved view in Gridlex Zip. Now you can manage and share your contacts effectively.

If you encounter any issues or have further queries, feel free to reach out to Gridlex at apps@gridlex.com.