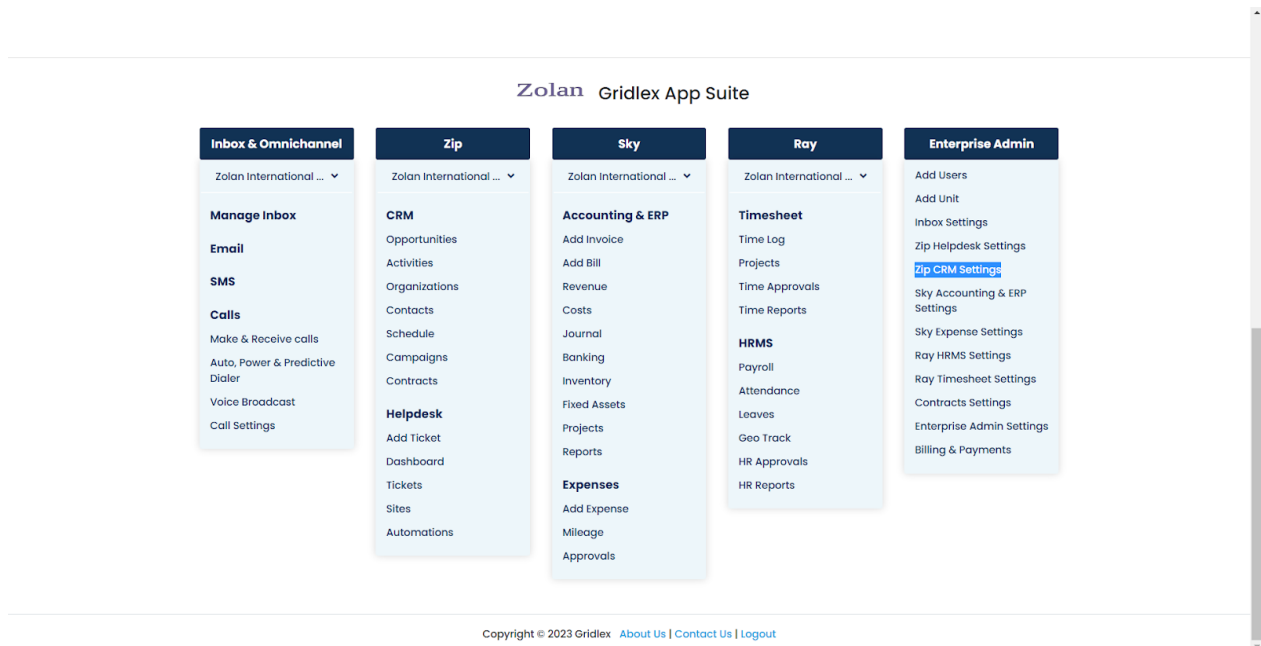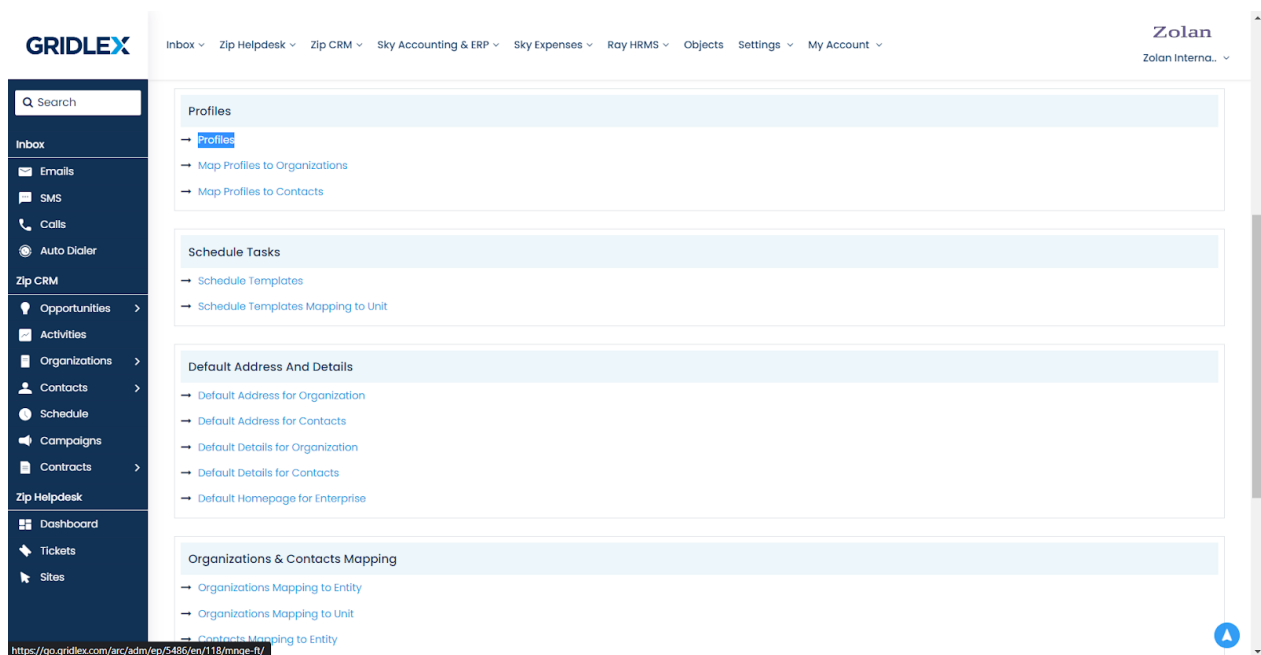This step-by-step guide will walk you through the process of creating custom profiles with existing custom fields in Gridlex App Suite.

Step 1: Log in to Gridlex App Suite and click on "Zip CRM Settings" located under the Enterprise Admin.

Step 2: Under the "Profiles" section, click on the "Profiles" option.

Step 3: After accessing the "Profiles" section, a new page will appear. On this page, look for the "Create Section" option in the top menu bar and click on it.

Step 4: In the newly created section, find and click on the "Add Custom Field" option. Fill in the required details for your custom field. Once you have configured the custom field to your liking, click on the "Submit" button to save it.

Step 5: After clicking "Submit," your custom field will be added to the list of fields within the section you created. You can review and manage all your custom fields from this page.

Step 6: To utilize the custom field, you need to map it to the appropriate profiles, such as Organizations or Contacts. Navigate to the "Create Profile" section. Select the relevant profile you want to map the custom field to. Allow the profile to access the custom field by selecting it from the available field options. Once you are satisfied with the profile settings, click on the "Submit" button to save the changes.

Note: If you want to use this profile for newly imported or created contacts, please choose "Auto Select this profile while adding new Organization or Contact". However, if you only want to add historical contacts that already exist in the system, please choose "Show and Map this profile to ALL Historical organizations or contacts". You can select both options according to your needs.

You have successfully created custom profiles with existing custom fields in Gridlex App Suite.