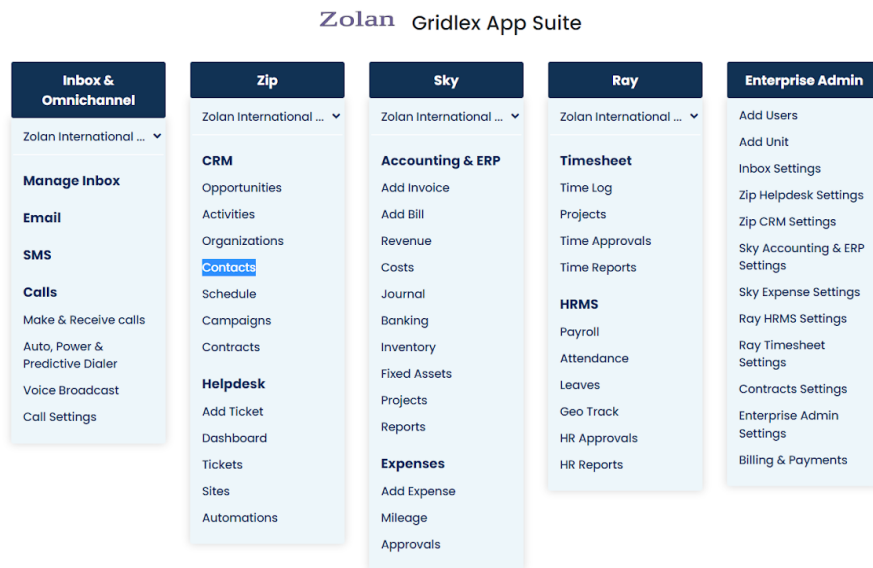
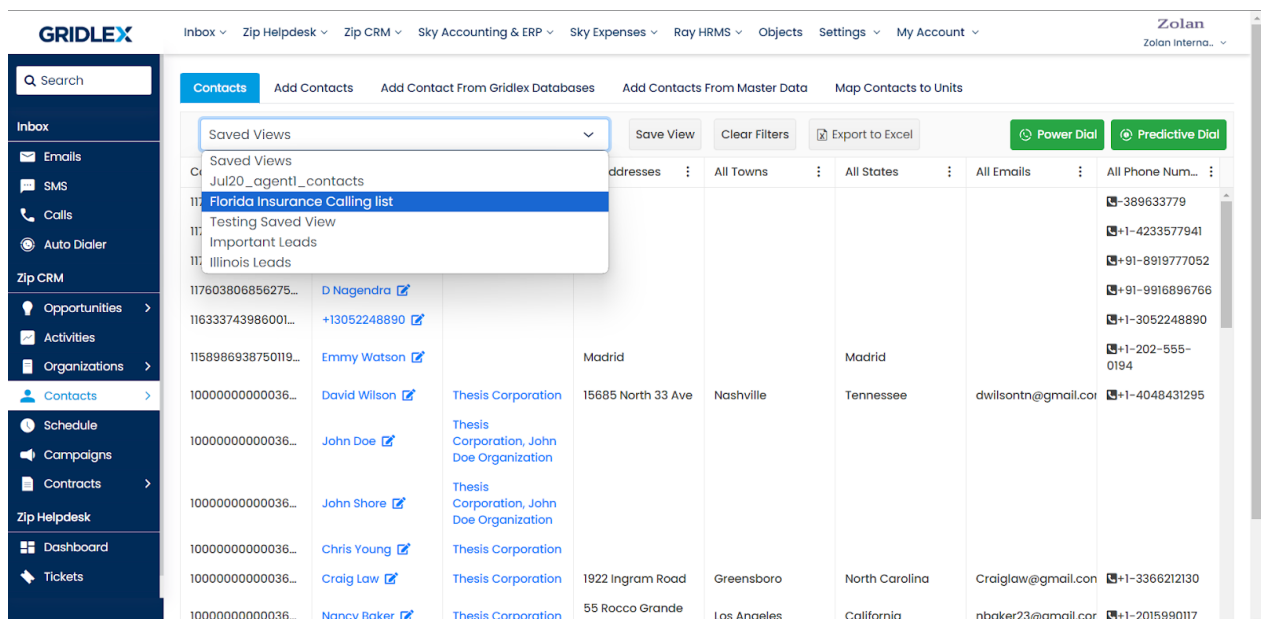


Follow these steps to edit your saved views:

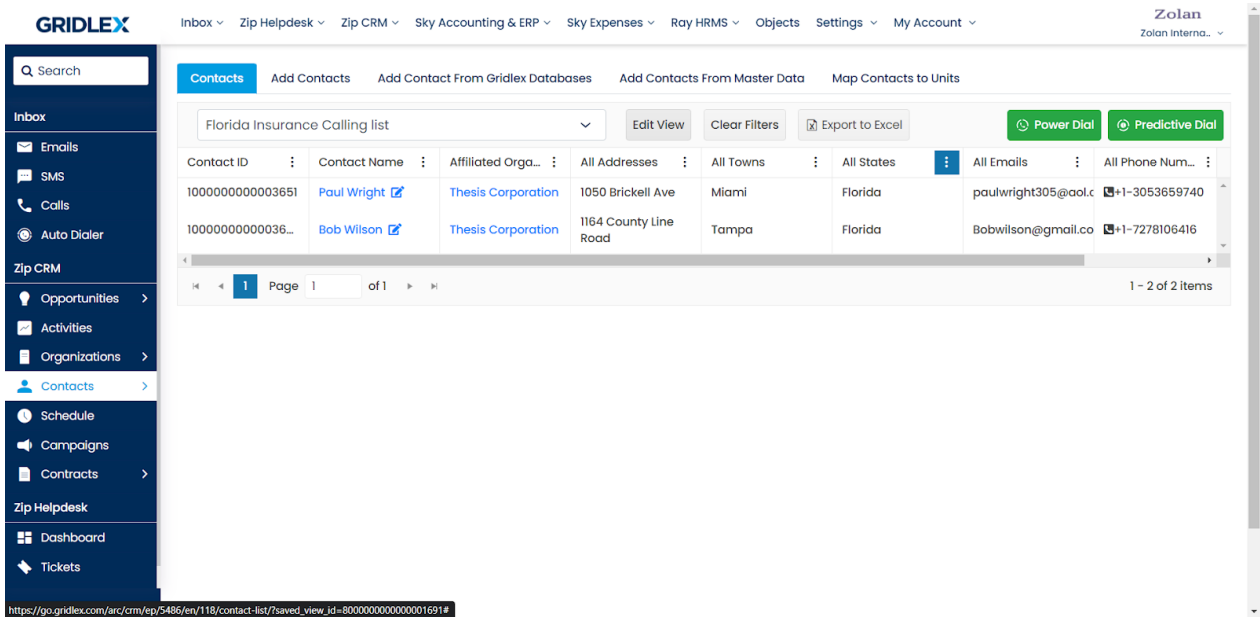
Step 1: Log in to the Gridlex App Suite and click on 'Contacts,' which is located under the Zip section in the navigation menu. Alternatively, if you want to edit a saved view, you can navigate to the specific page where the view is stored.



Step 2: Locate the dropdown menu near "Saved View." Click on the dropdown and select the specific view you want to modify.



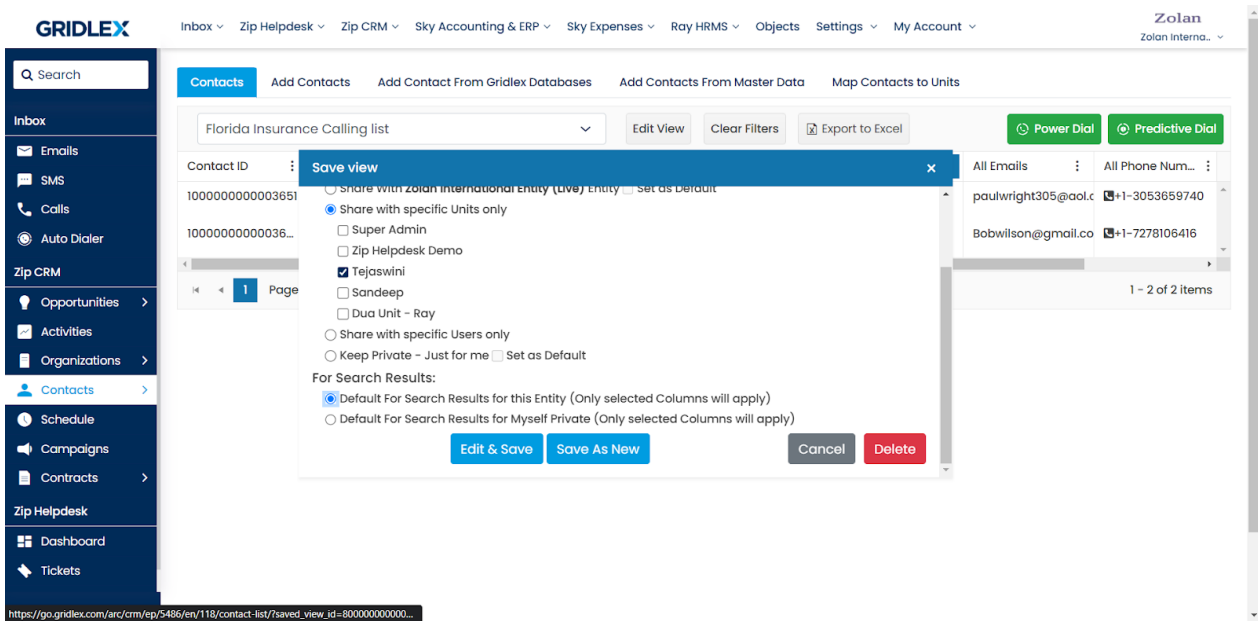
Step 3: After selecting the view you want to display, find the “Edit View” button. Click on it to initiate the editing process.



Step 4: This is the stage where you can make required changes to the saved view, such as altering the name, sharing it with specific units, and more. After making the necessary adjustments, click on “Edit and Save.”

If you want to delete the existing view, you can do so by selecting the delete option.

Note: If you want to create a new saved view from an existing one, you can click on the “Save as New” button.



You have successfully edited a saved view in Gridlex Zip CRM. The process is now complete, and you can utilize the modified view as needed.

Important Points to Consider

- Users cannot “edit and save” the Saved Views on the Tickets List Page.
- Saved views can be edited and saved on the Call Inbox Page, Contacts Page, & Organizations Page.
- Be mindful of the permissions and units with whom you are sharing the view to ensure it aligns with your organization's policies and procedures.

By following this guide, you can easily manage saved views to suit your specific requirements, enhancing efficiency and collaboration within your team.