

To edit or update a contact form in Gridlex Zip, follow the instructions outlined below:

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



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Step 2: Browse through the contact list to find the contact you wish to edit. Click on the pencil or 'edit' icon located next to the contact's name.

Note: The availability of this feature depends on your assigned permissions. If you don't have the permission to edit or update 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.. ▾

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...
1191283345930383...	support@zolan.com					support@zolan.com		
118955996403815...	Google					no-reply@accounts.goo		
118904033470614...	Emily Johnson							
118868568294483...	Brandon Brown					brandonxbrown1989@	+91-1234567891	
118868568245413...	B Navya						+91-8886547421	
118868421304263...	+911234567891						+91-9400260928	
1187298894321901...	Gridlex					notifications@gridlex		
1187297942781124...	Gridlex Team					forwarding-noreply@google.com		
1187297929011224...	brandonxbrown1989@					brandonxbrown1989@		
1187297930521165...	marketingandsales@					marketingandsales@		
118729792728736...	gmail.combrandonx					gmail.combrandonx		
118729201556687...	Md Nihal						+91-7012092837	

Step 3: You will be taken to the contact editing page. Identify the section of the Contact Form you wish to make changes for, and click on the corresponding "Edit" button.

Note: What you're seeing here are termed 'Contact Attributes Form'. These are standardized fields which contain the general information gathered from a contact and are predefined in the system. If your intentions are to edit custom fields or objects that have been added separately, jump to step 5.

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

EMILY JOHNSON
Emily Johnson

Feed Opportunities ▾ Activities ▾ Profile ▾ Organizations Schedule ▾ Emails Records

Contact Attributes Form Plot Details General Details Contact Profile

Basic Information → Edit Add Name

Contact Name Contact Name Type *

Emily Johnson Display Name ▾

First Name Middle Name Last Name

Title

Notes → Edit

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Step 4: After you've made the desired adjustments to the contact's details, finalize the process by clicking on the “Submit” button. This action will save the modifications.

The screenshot shows the Gridlex CRM interface for a contact named Emily Johnson. The top navigation bar includes 'Inbox', 'Zip Service Ops', 'Zip CRM', 'Sky Accounting & ERP', 'Sky Expenses', 'Ray HRMS', 'Objects', 'Settings', and 'My Account'. The user is logged in as 'Zolan Zolan Intern...'. The left sidebar contains various menu items like 'Inbox', 'Emails', 'SMS', 'Calls', 'Auto Dialer', 'Zip CRM', 'Opportunities', 'Activities', 'Organizations', 'Contacts', 'Schedule', 'Campaigns', 'Contracts', 'Zip Service Ops', 'Dashboard', 'Records', and 'Sites'. The main content area is titled 'EMILY JOHNSON' and 'Emily Johnson'. Below the name are tabs for 'Feed', 'Opportunities', 'Activities', 'Profile', 'Organizations', 'Schedule', 'Emails', and 'Records'. The 'Profile' tab is active, and within it, the 'Contact Attributes Form' is selected. The form has several sections: 'Basic Information' with fields for 'Contact Name' (Emily Johnson), 'Contact Name Type' (Display Name), 'First Name' (Emily), 'Middle Name', 'Last Name' (Johnson), and 'Title' (Ms). At the bottom of the form, there are 'Submit' and 'Cancel' buttons, with a red arrow pointing to the 'Submit' button. Below the form is a 'Notes' section with an 'Edit' button and a rich text editor.

Step 5: Click on “Contact Profile”. Next, find and click the “Edit” option located on the screen's right side. Once you've made your changes, ensure you click on “Submit” to save.

The screenshot shows the Gridlex CRM interface for the same contact, Emily Johnson. The navigation and sidebar are the same as in the previous screenshot. The 'Profile' tab is still active, but now the 'Contact Profile' sub-tab is selected. The 'Table of Contents' section shows 'Category' as the active item. Below this, there is a 'Category' section with fields for 'Territory' (North), 'Contract Type' (Service Contracts), 'Contract Pricing Files' (Choose file, No file chosen), and 'Type of Land'. At the bottom of the form, there is a 'Submit' button, with a red arrow pointing to it. A 'History' button is also visible in the top right corner of the form area.

You have successfully edited a contact form in Gridlex Zip.

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.