

Welcome to our comprehensive guide on utilizing the listing view in Gridlex.

Organizing, visualizing, and analyzing data is paramount in today's fast-paced professional world. With the listing view in Gridlex, you have an intuitive interface coupled with powerful features to meet these needs.

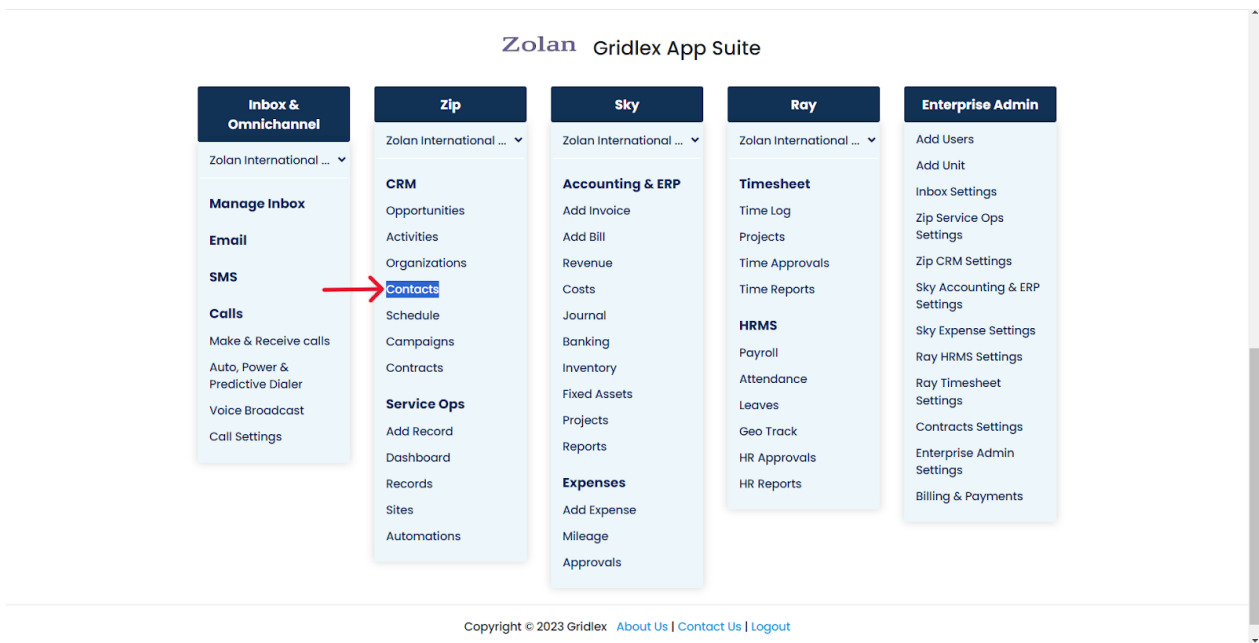
This tutorial will walk you through the following:

- The "Columns" feature
- The "Filter" feature
- The "Set Column Position" feature
- The “Export to Excel” feature
- Additional features

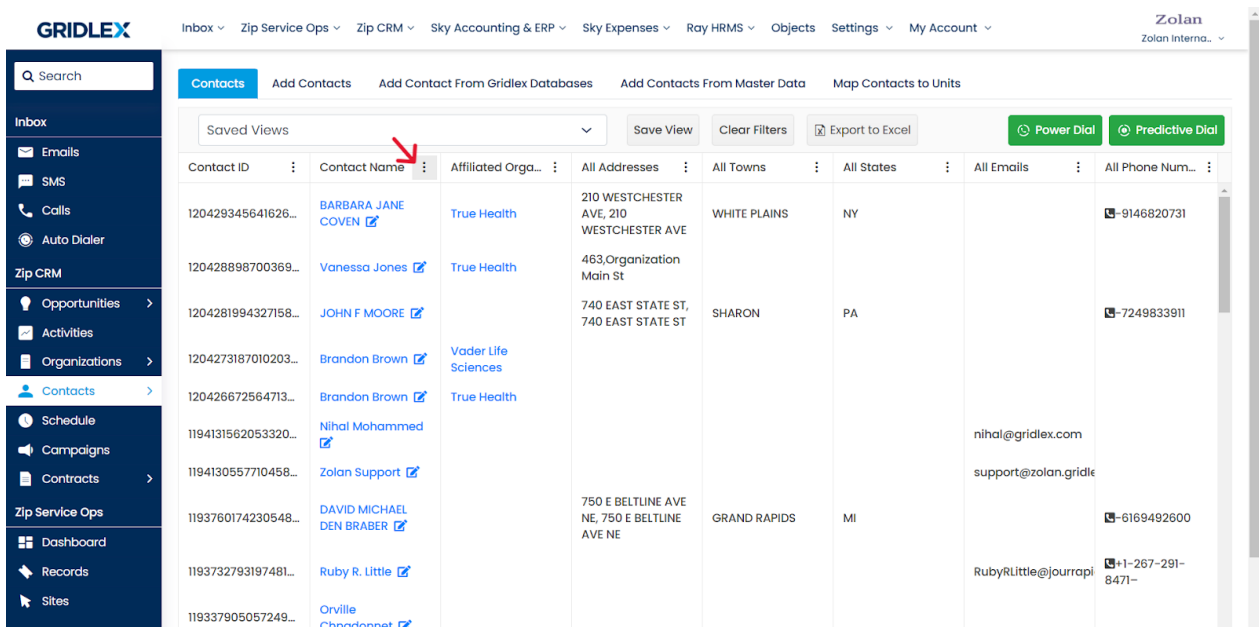
**Note: We are using the Contacts module as an example to explain the listing view functions. The same features apply to all the modules, such as opportunities, activities, organizations etc.**

**Step 1:** Log in to Gridlex App Suite. Navigate to the “Contacts” module found under the “Zip” section.

**Note: While this guide uses "Contacts" as an example, the steps apply to other modules like opportunities, activities, and organizations.**



**Step 2:** Click on the three-dot menu to access column settings. Clicking on it will provide a dropdown of various settings options.



**Step 3:** From the dropdown, users have the choice to sort contacts in ascending or descending order based on the selected column. This is handy when you have numerous entries, and you want to quickly locate specific ones.

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Add Contact From Gridlex Databases

Add Contacts From Master Data

Map Contacts to Units

Saved Views

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Power Dial

Predictive Dial

Contact ID	Contact Name	Affiliated Orga...	All Addresses	All Towns	All States	All Emails	All Phone Num...
120429345641626...	BARBARA JANE COVEN						820731
120428898700369...	Vanessa Jones						
1204281994327158...	JOHN F MOORE		740 EAST STATE ST, 740 EAST STATE ST	SHARON	PA		7249833911
1204273187010203...	Brandon Brown	Vader Life Sciences					
120426672564713...	Brandon Brown	True Health					
1194131562053320...	Nihal Mohammed					niha1@gridlex.com	
1194130557710458...	Zolan Support					support@zolan.gridlex.com	
1193760174230548...	DAVID MICHAEL DEN BRABER		750 E BELTLINE AVE NE, 750 E BELTLINE AVE NE	GRAND RAPIDS	MI		6169492600
1193732793197481...	Ruby R. Little					RubyRLittle@jourrap...	+1-267-291-8471-
119337905057249...	Orville Chnadonnet						

# Advanced Features Overview:

## 1. Managing Columns

In the 'Columns' dropdown, you'll notice checkboxes. Checking these boxes determines which columns are displayed on the page. Once you've made your selection, click the 'Apply' button to update the listing view. The view will reflect your choices.

**Note:** If you want to revert to the original settings, there's a 'Reset' button. Click it, and all customizations will be reverted. Remember, if you've already applied changes and want to undo a few, you'll need to manually deselect columns.

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**Contacts**   Add Contacts   Add Contact From Gridlex Databases   Add Contacts From Master Data   Map Contacts to Units

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Contact ID	Contact Name	Affiliated Orga...	All Addresses	All Towns	All States	All Emails	All Phone Num...
120429345641626...	BARBARA JANE COVEN						820731
120428898700369...	Vanessa Jones						
1204281994327158...	JOHN F MOORE						833911
1204273187010203...	Brandon Brown						
120426672564713...	Brandon Brown						
1194131562053320...	Nihal Mohammed						
1194130557710458...	Zolan Support						
1193760174230548...	DAVID MICHAEL DEN BRABER		750 E BELTLINE AVE NE, 750 E BELTLINE AVE NE	GRAND RAPIDS	MI		6169492600
1193732793197481...	Ruby R. Little					RubyRLittle@jourrapi	+1-267-291-8471-
119337905057249...	Orville Chnadonnet						

**Columns**

Search for Columns   Clear Search

CONTACT NATIVE FIELDS

- ☒ Contact ID
- ☒ Contact Name
- ☐ First Name
- ☒ Middle Name
- ☐ Last Name

Reset   **Apply**

**Filter**

☐ Set Column Position

**Note: Want a specific column at the beginning or the end? Simply drag and drop the column to its new position.**

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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	All Addresses	All Towns	All States	All Emails	All Phone Num...
120429345641626...	BARBARA JANE COVEN	True Health	WHITE PLAINS	NY		9146820731
120428898700369...	Vanessa Jones	True Health				
1204281994327158...	JOHN F MOORE		SHARON	PA		7249833911
1204273187010203...	Brandon Brown	Vader Life Sciences				
120426672564713...	Brandon Brown	True Health				
1194131562053320...	Nihal Mohammed				niha@gridlex.com	
1194130557710458...	Zolan Support				support@zolan.gridlex	
1193760174230548...	DAVID MICHAEL DEN BRABER		GRAND RAPIDS	MI		6169492600
1193732793197481...	Ruby R. Little				RubyRLittle@jourrapi	+1-267-291-8471-
119337905057249...	Orville Chnadonnet					

## 2. Using the Filter Feature

The filter is a powerful tool to streamline your displayed data. Whether you have a keyword, date, or specific criterion, the filter will help you narrow down the list. For example, let's say you're interested in a contact named

“Ruby.” Enter this keyword in the Contact Name filter section. Next, specify whether the keyword should match all criteria (AND) or any of the criteria (OR). After setting your conditions, click on the 'Filter' button.

The screenshot shows the GRIDLEX interface with the 'Contacts' tab selected. A filter is applied to the 'Contact Name' column, set to 'Contains' with the keyword 'ruby'. The 'Filter' button is highlighted with a red arrow. The table displays contact information including ID, Name, Affiliated Org., All Addresses, All Towns, All States, All Emails, and All Phone Numbers.

Contact ID	Contact Name	Affiliated Org.	All Addresses	All Towns	All States	All Emails	All Phone Numbers
1204293456416264193	BARBARA JANE COVEN	True Health	210 WESTCHESTER AVE, 210 WESTCHESTER AVE	WHITE PLAINS	NY		+1-914-682-0731
1204288987003695105	Vanessa Jones	True Health	463, Organization Main St				
1204281994327158785	JOHN F MOORE		740 EAST STATE ST, 740 EAST STATE ST	SHARON	PA		+1-724-983-3911
1204273187010203649	Brandon Brown	Vader Life Sciences					
1204266725647134721	Brandon Brown	True Health					
1194131562053320705	Nihal Mohammed					nihal@gridlex.com	
1194130557710458881	Zolan Support					support@zolan.gridlex	
1193760174230548481	DAVID MICHAEL DEN BRABER		750 E BELTLINE AVE NE, 750 E BELTLINE AVE NE	GRAND RAPIDS	MI		+1-616-949-2600
1193732793197481985	Ruby R. Little					RubyRLittle@jourrap	+1-267-291-8471
1193379050572492801	Orville Chnadonnet						

**Note: For a fresh start, you can wipe all the set filters with the 'Clear Filters' option.**

The screenshot shows the GRIDLEX interface with the 'Contacts' tab selected. The 'Clear Filters' button is highlighted with a red arrow. The table displays contact information including ID, Name, Affiliated Org., All Addresses, All Towns, All States, All Emails, and All Phone Numbers.

Contact ID	Contact Name	Affiliated Org.	All Addresses	All Towns	All States	All Emails	All Phone Numbers
120429345641626...	BARBARA JANE COVEN	True Health	210 WESTCHESTER AVE, 210 WESTCHESTER AVE	WHITE PLAINS	NY		+1-914-682-0731
120428898700369...	Vanessa Jones	True Health	463, Organization Main St				
1204281994327158...	JOHN F MOORE		740 EAST STATE ST, 740 EAST STATE ST	SHARON	PA		+1-724-983-3911
1204273187010203...	Brandon Brown	Vader Life Sciences					
120426672564713...	Brandon Brown	True Health					
1194131562053320...	Nihal Mohammed					nihal@gridlex.com	
1194130557710458...	Zolan Support					support@zolan.gridlex	
1193760174230548...	DAVID MICHAEL DEN BRABER		750 E BELTLINE AVE NE, 750 E BELTLINE AVE NE	GRAND RAPIDS	MI		+1-616-949-2600
1193732793197481...	Ruby R. Little					RubyRLittle@jourrap	+1-267-291-8471
119337905057249...	Orville Chnadonnet						

### 3. Column Positioning

Some columns are crucial and need to be constantly visible. To achieve this, use the 'Stick Column' function. For instance, if you want 'Contact Name' and 'Contact ID' to be perpetually visible, even while scrolling, stick these columns. Feel like changing which columns are stuck? Use the 'Unstick Column' option to revert them back to their scrollable state.

The screenshot displays the GRIDLEX application interface. On the left is a dark blue sidebar with navigation links: Inbox, Emails, SMS, Calls, Auto Dialer, Zip CRM, Opportunities, Activities, Organizations, Contacts (selected), Schedule, Campaigns, Contracts, Zip Service Ops, Dashboard, Records, and Sites. The main header area includes the GRIDLEX logo, a search bar, and various dropdown menus for navigation. The 'Contacts' tab is active, showing a table of contact records. A context menu is open over the 'Contact Name' column, with the 'Stick Column' option highlighted by a red arrow. The table columns include Contact ID, Contact Name, Affiliated Orga..., All Addresses, All Towns, All States, All Emails, and All Phone Num... The table contains several rows of contact data, including Barbara Jane Coven, Vanessa Jones, John F. Moore, Brandon Brown, Nihal Mohammed, Zolan Support, David Michael Den Braber, Ruby R. Little, and Orville Chnadonnet.

## 4. Exporting to Excel

If you need your data offline or in a spreadsheet format for further analysis, the 'Export to Excel' feature is your friend. Click the 'Export to Excel' option. A spreadsheet will be automatically generated and downloaded, mirroring your current listing view, including filters, column choices, and positions.

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Contact ID	Contact Name	Affiliated Orga...	All Addresses	All Towns	All States	All Emails	All Phon
1204293456416264193	BARBARA JANE COVEN	True Health	210 WESTCHESTER AVE, 210 WESTCHESTER AVE	WHITE PLAINS	NY		91468
1204288987003695105	Vanessa Jones	True Health	463,Organization Main St				
1204281994327158785	JOHN F MOORE		740 EAST STATE ST, 740 EAST STATE ST	SHARON	PA		7249
1204273187010203649	Brandon Brown	Vader Life Sciences					
1204266725647134721	Brandon Brown	True Health					
1194131562053320705	Nihal Mohammed					nihal@gridlex.com	
1194130557710458881	Zolan Support					support@zolan.gridlex.com	
1193760174230548481	DAVID MICHAEL DEN BRABER		750 E BELTLINE AVE NE, 750 E BELTLINE AVE NE	GRAND RAPIDS	MI		61694
1193732793197481985	Ruby R. Little					RubyRLittle@jourrap	+1-267-8471-
1193379050572492801	Orville Chnadonnet						

# Additional Features in the listing view:

## 1. Column Resizing

Want to see more data within a column or less? You can manually adjust a column's width. Hover over a column's border until your cursor changes, then click and drag to your preferred size.

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Contact ID	Contact Name	Affiliated Orga...	All Addresses	All Towns	All States	All Emails	All Phone Num...
120431006255074...	Dua						3896337795
120431006216906...	Shawn						+1-4233577941
120429345641626...	BARBARA JANE COVEN	True Health	210 WESTCHESTER AVE, 210 WESTCHESTER AVE	WHITE PLAINS	NY		9146820731
120428898700369...	Vanessa Jones	True Health	463,Organization Main St				
1204281994327158...	JOHN F MOORE		740 EAST STATE ST, 740 EAST STATE ST	SHARON	PA		7249833911
1204273187010203...	Brandon Brown	Vader Life Sciences					
120426672564713...	Brandon Brown	True Health					
1194131562053320...	Nihal Mohammed					nihal@gridlex.com	
1194130557710458...	Zolan Support					support@zolan.gridlex.com	
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1193732793197481...	Ruby R. Little					RubyRLittle@jourrap	+1-267-291-8471-

## 2. Saving Personalized Views

If you've set up the listing view in a way that suits your workflow, you can save it. To ensure it remains private to you, select 'Keep Private' and then hit 'Save.'

**Note: To make a saved view accessible to team members or other users, select the appropriate visibility option from the checklist.**

Please refer to this guide for more information on saved views: [How to Create a Saved View in Contract Listing in Gridlex Zip?](#)

The screenshot displays the Gridlex application interface. A 'Save view' modal is open, allowing the user to configure a new saved view. The modal includes a 'Name' input field and two sections for configuring visibility: 'For Listing Page' and 'For Search Results'. In the 'For Listing Page' section, the 'Keep Private - Just for me' option is selected. In the 'For Search Results' section, the 'Default For Search Results for Myself Private' option is selected. The background shows a table of contact data with columns for Contact ID, Name, Address, and Phone. The table lists several contacts, including David Michael Den Braber, Ruby R. Little, and Orville Chnadonnet.

**Note: The 'Hide' function in the 'Action' column is a way to temporarily remove specific entries from your view, similar to a 'Delete' option. But fear not; any hidden data can be retrieved. Simply contact Gridlex's support team at [apps@gridlex.com](mailto:apps@gridlex.com).**

Congratulations! You have now learned how to utilize the listing view in Gridlex.

If you need any help with any feature, data migration of your old data, or anything at all, just email [apps@gridlex.com](mailto: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.



