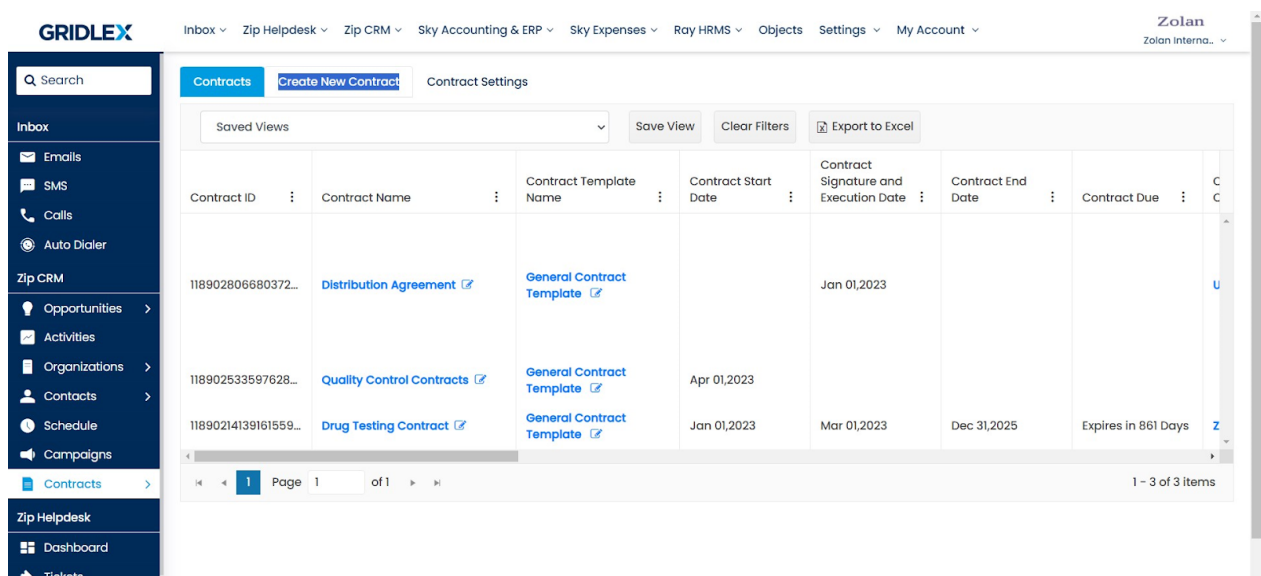


Follow these steps to create a contract in Gridlex Zip.

Step 1: Log in to your Gridlex App Suite account and click on the "Contracts" option under the Zip tab.



Step 2: From the navigation bar, click on “Create New Contract.”



GRIDLEX

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Contracts / Create New Contract

Contracts

Create New Contract

Contract Settings

Choose Contract Template

General Contract Template

Create New Contract Template

Contract Details

Contract Name*

Distribution Agreement

Sub-Contract Name

Purchase

Contract Start Date

dd-mm-yyyy

Contract Signature and Execution Date

01-01-2023

Contract End Date

dd-mm-yyyy

Contract Due

Contract Upload Files

Choose Files

No file chosen

Contract Items

One Plus

Create New Item

Contract Description

Poppins - Medium

15

B

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X

It provides a clear and comprehensive description of the items being purchased, the price, payment terms, delivery details, warranties, and other important terms related to the sale

Note: A contract counterparty refers to the organization you are entering into the contract with.

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Associated Counterparties (Contract Counterparties)

Associated Counterparties

Action	Name	Phone	Address	Town	State	Zipcode	Unit Name	Other Details
	United							

Search and Associate Counterparties

United

Associate

United Resources

7570,176th St

Mc Alpin

Select Option

- Select Option
- Native Fields
- Organization ID
- Organization Name
- All Addresses
- Organization General Information | Organization Additional Information
- Network Id
- Organization Type

QSearch

Associated Organizations

Associated Organizations

Action	Name	Phone	Address	Town	State	Zipcode	Unit Name	Other Details

Search and Associate Organizations

Search

Select Option

QSearch

Step 5: Similarly, you can associate any other organizations that are relevant to the contract by searching the organization ID, name, address, or any other details and clicking on “Associate.”

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Associated Counterparties (Contract Counterparties)

Associated Counterparties

Action	Name	Phone	Address	Town	State	Zipcode	Unit Name	Other Details
Disassociate	United Resources		7570,176th St	Mc Alpin	Florida(FL)	32062		Organization Name: United Resources Organization ID: 1150675546552950785 Address: 7570,176th St

Search and Associate Counterparties

United

Select Option

QSearch

Associated Organizations

Associated Organizations

Action	Name	Phone	Address	Town	State	Zipcode	Unit Name	Other Details

Search and Associate Organizations

google

Associate

google

Select Option

- Select Option
- Native Fields
- Organization ID
- Organization Name
- All Addresses
- Organization General Information | Organization Additional Information
- Network Id
- Organization Type

QSearch

Associated Contacts

Associated Contacts

Action	Name	Phone	Address	Town	State	Zipcode	Unit Name	Other Details

Step 6: You can also associate/add important counterparty contacts to the contract. To do so, search for the contact name, phone number, email, ID, or any other details and click on “Associate.”

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Action	Name	Phone	Address	Town	State	Zipcode	Unit Name	Other Details
Associated Organizations								
Associated Organizations								
Disassociate	google							Organization Name: google

Search and Associate Organizations

Search Select Option

Action	Name	Phone	Address	Town	State	Zipcode	Unit Name	Other Details
Associated Contacts								
Associated Contacts								
Disassociate	Tom Sharp							name: Tom

Search and Associate Contacts

G tejas Select Option

Select Option

- Native Fields
- All Phone Numbers
- All Emails
- All Website Links
- Contact ID

Action	Name	Phone	Address	Town	State	Zipcode	Unit Name	Other Details
Associated Users								
Associated Users								
Associate	G Tejaswini							Contact Name: G Tejaswini

Step 7: In the same way, if you want to associate specific users with the contract, you can quickly search for their email IDs and add them.

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Search Select Option

Associated Users

navya@gridlex.com

navya

Associated Contracts

Search and Associate Contracts

Search and Associate

Associated Units

Search and Associate Units

Search and Associate

Associated Tickets

Search and Associate Tickets

Search and Associate

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Note: A user refers to an individual from the enterprise that is drafting the contract. You can associate as many users as you need to a contract. In case a contract template has associated users, they will be automatically added in this section when you create a contract with that template. However, you will still be able to remove them if you want. Refer to the screenshots below.

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Search

Zip CRM

Opportunities > Activities > Organizations > Contacts > Schedule > Campaigns > **Contracts** >

Zip Helpdesk

Dashboard Tickets Sites

Contract Template Name Make as Default Template

Pharmaceutical Contract Template

Native Field Name	Show in Contract	Field Required ?	Display Name
Contract Name			Contract Name
Sub-Contract Name	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Sub-Contract Name
Contract Counterparties	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Contract Counterparties
Contract Start Date	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Contract Start Date
Contract Signature and Execution Date	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Contract Signature and Execution Date
Contract End Date	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Contract End Date
Contract Due	<input checked="" type="radio"/> Yes <input type="radio"/> No		Contract Due
Contract Description	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	Contract Description
Contract Items	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Contract Items
Associate Organizations	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Associate Organizations
Associate Contacts	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Associate Contacts
Associate Users	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Associate Users

Search and Automatically Associate following Users to the Contract:

☒ Automatically Associate the User adding the Contract

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Search

Zip CRM

Opportunities > Activities > Organizations > Contacts > Schedule > Campaigns > **Contracts** >

Zip Helpdesk

Dashboard Tickets

Associated Contacts


Action	Name	Phone	Address	Town	State	Zipcode	Unit Nar
No Contacts are associated to this Contract. Please search Contacts in below panel to associate with this Contract.							

Search and Associate Contacts

Search

Associated Users

Search and Associate Users



Associated Contracts

Search and Associate Contracts

Associated Units

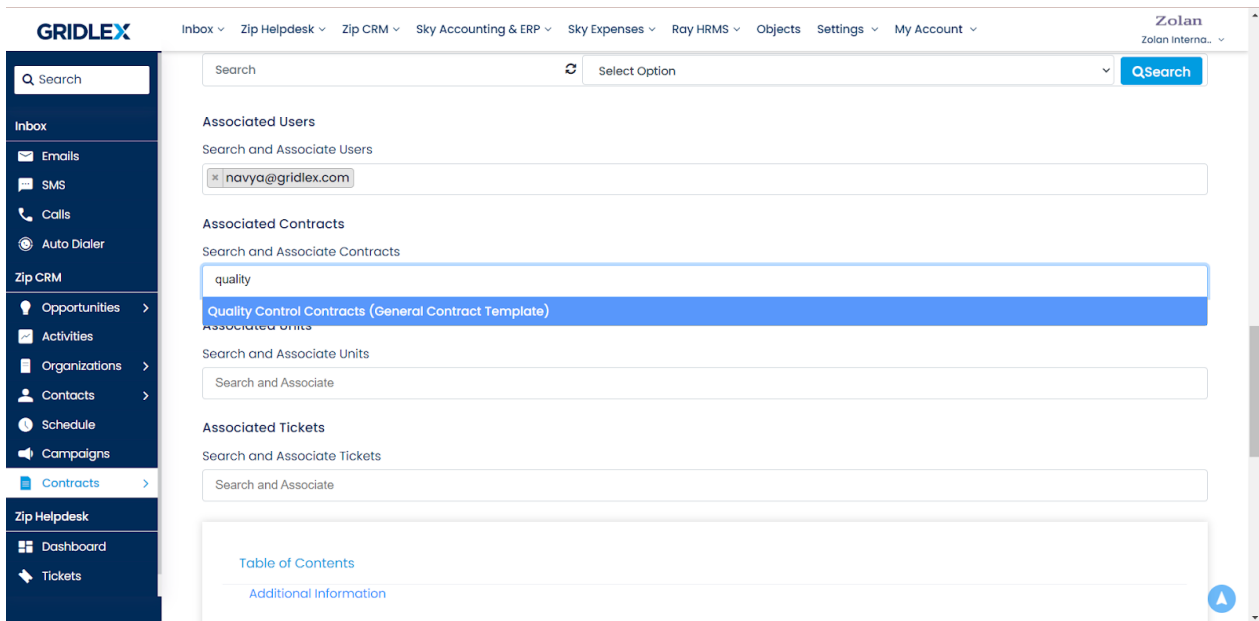
Search and Associate Units

Associated Tickets

Search and Associate Tickets

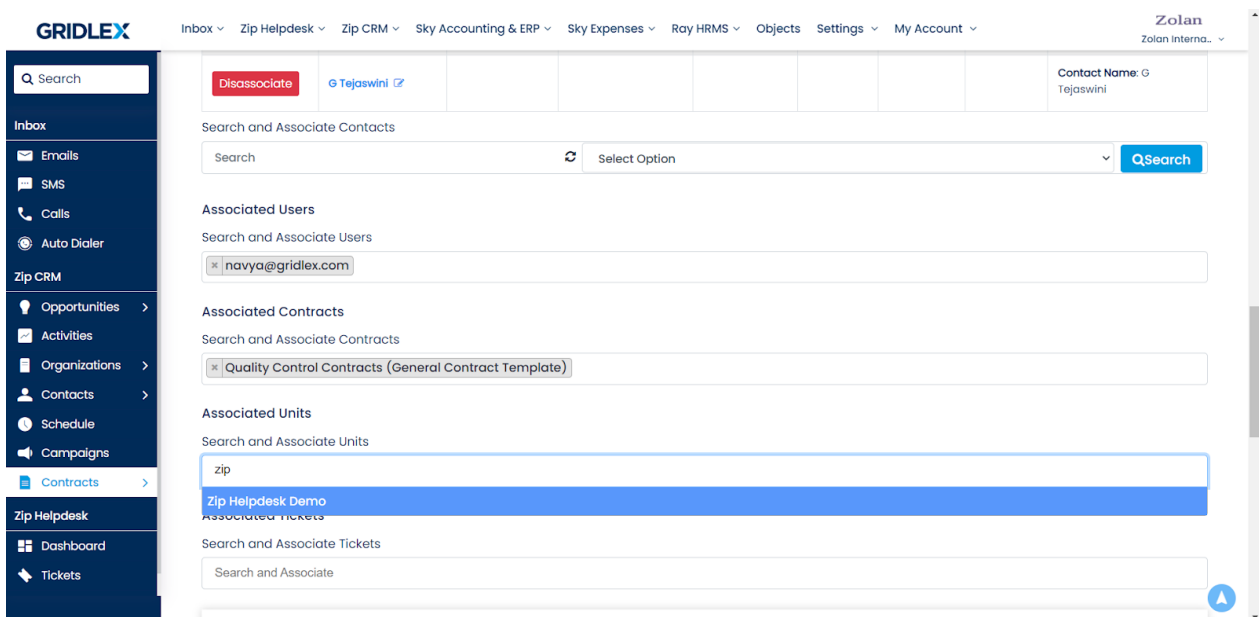
Step 8: If any other contract is related to the contract you are creating now, you can search for the contract name and select it to associate it with the current contract.

For instance, here, “Quality Control Contracts” is related to “Distribution Agreement,” so we have associated it in the contract.



Step 9: You can also associate specific units with the contract by searching for the unit name and selecting it.

Note: In case a contract template has associated units, they will be automatically added in this section when you create a contract with that template. However, you will still be able to remove them if you want.



Step 10: If you have any tickets that are related to the contract you are creating, you can associate them by searching the ticket subject and selecting them.

The screenshot displays the GRIDLEX application interface. On the left is a dark blue sidebar with navigation options: Search, Inbox, Emails, SMS, Calls, Auto Dialer, Zip CRM, Opportunities, Activities, Organizations, Contacts, Schedule, Campaigns, Contracts, Zip Helpdesk, Dashboard, and Tickets. The top navigation bar includes links for Inbox, Zip Helpdesk, Zip CRM, Sky Accounting & ERP, Sky Expenses, Ray HRMS, Objects, Settings, and My Account. The main content area is titled 'Associated Tickets' and contains a search bar with the text 'One plus'. Below the search bar, a list of results is shown, with 'One plus - Distribution' highlighted in blue. At the bottom of the main content area, there are two links: 'Table of Contents' and 'Additional Information'.

Step 11: After you're done with associations, scroll down to the "Additional Information" section and fill in all the necessary details. Please remember that section names and section information change based on the contract template you chose. Contracts can be created with or without any sections.

Note: If your contract template has default values, then the section field information is automatically added. However, if you want to modify the section, you can do so by editing each field separately or clearing the entire section by clicking the "Clear Section Fields."

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1. Section Name : Additional Information Clear Section Fields

Standard Fields

Department Country

Custom Fields

Discount % Contract Price Contract Type

Contract Pricing Files

No file chosen

Custom Objects

Price Group

Choose Instance

Step 12: Once you are done adding all the details, click on “Create Contract.”

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1. Section Name : Additional Information Clear Section Fields

Standard Fields

Department Country

Custom Fields

Discount % Contract Price Contract Type

Contract Pricing Files

No file chosen

Custom Objects

Price Group

Choose Instance

Discount %	Date	Contract Type	Contract Price
2%	2023-01-01	Real Estate Contracts	\$230.00

Create Contract Cancel

You have successfully created a contract in Gridlex Zip. Your contract is now ready for use, and you can update it whenever needed. If you encounter any difficulties or have questions, feel free to reach out to Gridlex support at apps@gridlex.com.