

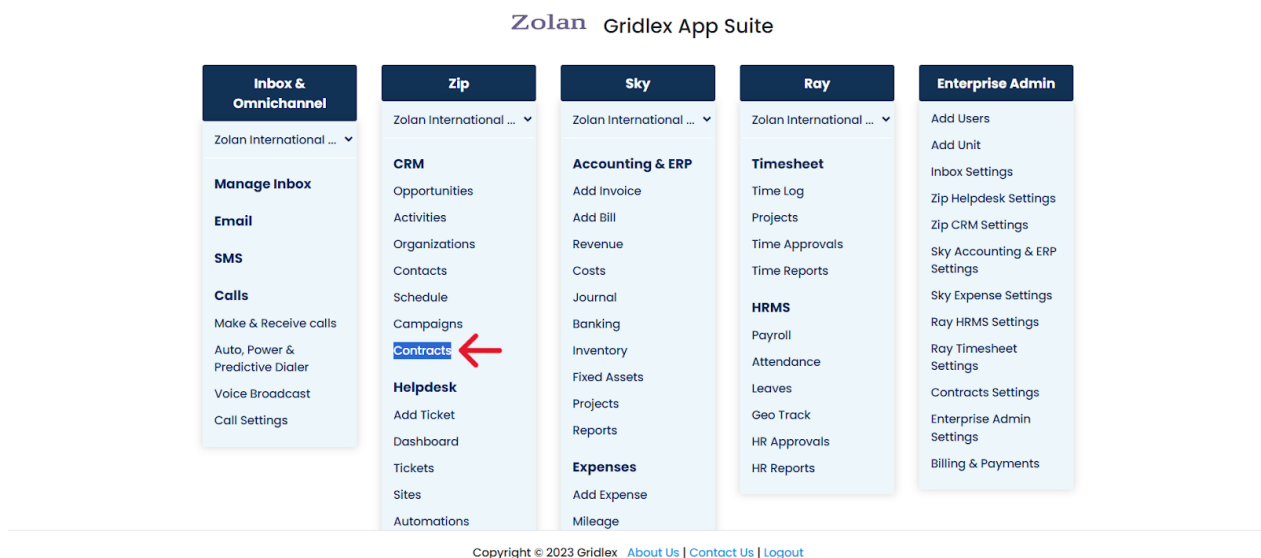
Welcome to our comprehensive guide on utilizing the listing view in Gridlex.

The contract listing view is designed to streamline these tasks, offering an intuitive interface and powerful features that adapt to your unique 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

Step 1: Log in to the Gridlex App Suite and click ‘Contracts’ under the Zip section.



Step 2: Click on the three-dot menu to reveal the column settings.

GRIDLEX

Inbox

Zip Helpdesk

Zip CRM

Sky Accounting & ERP

Sky Expenses

Ray HRMS

Objects

Settings

My Account

Zolan

Zolan Interna..

Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Zip Helpdesk

Dashboard

Contracts

Create New Contract

Contract Settings

Saved Views

Save View

Clear Filters

Export to Excel

Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	
118902806680372...	Distribution Agreement	General Contract Template		Jan 01,2023			U
118902533597628...	Quality Control Contracts	General Contract Template	Apr 01,2023				
11890214139161559...	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 861 Days	Z

Page 1 of 1

1 - 3 of 3 items

Step 3: You can see multiple options here, starting with sorting the contracts in ascending or descending order; this will sort the listing view based on the column of your choice.

GRIDLEX

Inbox

Zip Helpdesk

Zip CRM

Sky Accounting & ERP

Sky Expenses

Ray HRMS

Objects

Settings

My Account

Zolan

Zolan Interna..

Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Zip Helpdesk

Dashboard

Contracts

Create New Contract

Contract Settings

Saved Views

Save View

Clear Filters

Export to Excel

Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	
118902806680372...							U
11890214139161559...	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 861 Days	Z
118902533597628...	Quality Control Contracts	General Contract Template	Apr 01,2023				

Page 1 of 1

1 - 3 of 3 items

Features:

How to use the 'Columns' option?

Under the 'Columns' option, you can check the desired columns that you want to be displayed and click 'Apply.'

You can reset the displayed columns to default by clicking 'Reset.'

The screenshot shows the GRIDLEX interface with a sidebar on the left containing navigation links like 'Inbox', 'Emails', 'SMS', 'Calls', 'Auto Dialer', 'Zip CRM', 'Opportunities', 'Activities', 'Organizations', 'Contacts', 'Schedule', 'Campaigns', 'Contracts', 'Zip Helpdesk', and 'Dashboard'. The main area displays a table with columns: 'Contract ID', 'Contract Name', 'Contract Template Name', 'Contract Start Date', 'Contract Signature and Execution Date', 'Contract End Date', 'Contract Due', and 'Counterparty'. A dropdown menu is open over the table, showing options for 'Sort Ascending', 'Sort Descending', and 'Columns'. The 'Columns' section is expanded, showing a search bar and a list of columns with checkboxes: 'Contract ID' (checked), 'Contract Name' (checked), 'Contract Template Name' (checked), 'Sub-Contract Name' (unchecked), 'Contract Start Date' (checked), and 'Contract Signature and Execution Date' (checked). There are 'Reset' and 'Apply' buttons at the bottom of the dropdown. The table below shows three items with their respective details.

Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	Counterparty
118902141391615						Expires in 861 Days	Z
11890253359762							
1189028066803							U

Note: You can drag and drop a column to change its position.

The screenshot shows the GRIDLEX interface with the 'Contracts' table. The table has columns: 'Contract ID', 'Contract Name', 'Contract Template Name', 'Contract Start Date', 'Contract Signature and Execution Date', 'Contract End Date', 'Contract Due', and 'Counterparty'. The table contains three rows of data. The first row shows a contract with ID '1189025335976280065', named 'Quality Control Contracts', using a 'General Contract Template', starting on 'Apr 01, 2023', signed on 'Mar 01, 2023', ending on 'Dec 31, 2025', with a due date of 'Expires in 860 Days', and counterparty 'Zember P'. The second row shows a contract with ID '1189021413916155905', named 'Drug Testing Contract', using a 'General Contract Template', starting on 'Jan 01, 2023', signed on 'Mar 01, 2023', ending on 'Dec 31, 2025', with a due date of 'Expires in 860 Days', and counterparty 'Zember P'. The third row shows a contract with ID '1189028066803728385', named 'Distribution Agreement', using a 'General Contract Template', starting on 'Jan 01, 2023', signed on 'Jan 01, 2023', ending on 'Dec 31, 2025', with a due date of 'Expires in 860 Days', and counterparty 'United Re'. The table is paginated, showing 'Page 1 of 1' and '1 - 3 of 3 items'.

Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	Counterparty
1189025335976280065	Quality Control Contracts	General Contract Template	Apr 01, 2023	Mar 01, 2023	Dec 31, 2025	Expires in 860 Days	Zember P
1189021413916155905	Drug Testing Contract	General Contract Template	Jan 01, 2023	Mar 01, 2023	Dec 31, 2025	Expires in 860 Days	Zember P
1189028066803728385	Distribution Agreement	General Contract Template	Jan 01, 2023	Jan 01, 2023	Dec 31, 2025	Expires in 860 Days	United Re

How to use the 'Filter' option?

This option lets you filter your listing view based on keywords of your choice. Enter the keywords, select the desired criteria from the dropdown menu, and click 'Filter.'

You can clear any filter you have applied by clicking 'Clear.'

The screenshot displays the GRIDLEX CRM interface. On the left is a dark blue sidebar with navigation links: Inbox, Emails, SMS, Calls, Auto Dialer, Zip CRM, Opportunities, Activities, Organizations, Contacts, Schedule, Campaigns, and a 'Contracts' link. Below this is the 'Zip Helpdesk' section with links to Dashboard, Tickets, and Sites. The main content area shows a table with columns: Contract ID, Contract Name, Contract Template Name, Contract Start Date, Contract Signature and Execution Date, Contract End Date, Contract Due, and Counterparties. A dropdown menu is open for the 'Contract Name' column, showing options for 'Sort Ascending' and 'Sort Descending'. Below the sorting options is a 'Columns' section with a search bar and a list of columns to include: Contract Description, Users - (Associate Users), Units - (Associate Units), Status, Contract Created At, Contract Updated At, and Contract Created By. At the bottom of the dropdown is a 'Filter' section with a 'Contains' dropdown, a text input field for keywords, and buttons for 'And', 'Or', 'Filter', and 'Clear'. The table currently shows one item: 'Drug Testing Contract'.

Note: You can also clear all filters by clicking 'Clear Filters' on the listing view screen.

GRIDLEX

Inbox

Zip Helpdesk

Zip CRM

Sky Accounting & ERP

Sky Expenses

Ray HRMS

Objects

Settings

My Account

Zolan

Zolan Interna..

Q Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Zip Helpdesk

Dashboard

Tickets

Sites

Contracts

Create New Contract

Contract Settings

Saved Views

Save View

Clear Filters

Export to Excel

Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	Counterparty
1189025335976280065	Quality Control Contracts	General Contract Template	Apr 01,2023				
1189021413916155905	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 860 Days	Zember P
1189028066803728385	Distribution Agreement	General Contract Template		Jan 01,2023			United Re

1

Page 1 of 1

1 - 3 of 3 items

How to use the ‘Set Column Position’ option?

You can click ‘Stick Column’ to pin one or more columns of your choice, always to be displayed regardless of scrolling.

You can click ‘Unstick Column’ to release the pinned columns.

GRIDLEX

Inbox

Zip Helpdesk

Zip CRM

Sky Accounting & ERP

Sky Expenses

Ray HRMS

Objects

Settings

My Account

Zolan

Zolan Interna..

Q Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Zip Helpdesk

Dashboard

Tickets

Sites

Contracts

Create New Contract

Contract Settings

Saved Views

Save View

Clear Filters

Export to Excel

Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	Counterparty
1189028066803728385	Distribution Agreement						nited Re
1189025335976280065	Quality Control Contracts	Template	Apr 01,2023				
1189021413916155905	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 860 Days	Zember P

1

Page 1 of 1

1 - 3 of 3 items

How to use the “Export to Excel” feature?

Click ‘Export to Excel’ to export the listing view to a spreadsheet. The spreadsheet will be downloaded to your computer.

The exported spreadsheet will reflect the selected filters, columns you have chosen, and column positions.

The screenshot shows the GRIDLEX web application interface. The top navigation bar includes the GRIDLEX logo and various menu items like Inbox, Zip Helpdesk, Zip CRM, Sky Accounting & ERP, Sky Expenses, Ray HRMS, Objects, Settings, and My Account. The left sidebar contains a search bar and a list of navigation options including Emails, SMS, Calls, Auto Dialer, Zip CRM, Opportunities, Activities, Organizations, Contacts, Schedule, and Campaigns. The main content area is titled 'Contracts' and features a 'Create New Contract' button and a 'Contract Settings' link. Below these, there are buttons for 'Save View', 'Clear Filters', and 'Export to Excel', with a red arrow pointing to the 'Export to Excel' button. The table below displays a list of contracts with columns for Contract ID, Contract Name, Contract Template Name, Contract Start Date, Contract Signature and Execution Date, Contract End Date, Contract Due, and Counterparty. The table shows three rows of contract data.

Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	Counterparty
1189025335976280065	Quality Control Contracts	General Contract Template	Apr 01,2023				
1189021413916155905	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 860 Days	Zemmer P
1189028066803728385	Distribution Agreement	General Contract Template		Jan 01,2023			United Re

Additional Features in the Listing View:

You can click and drag a column's border to resize it to your desired width.

GRIDLEX

Inbox
Zip Helpdesk
Zip CRM
Sky Accounting & ERP
Sky Expenses
Ray HRMS
Objects
Settings
My Account

Zolan

Zolan Internat...

Contracts

Create New Contract

Contract Settings

Saved Views

Save View

Clear Filters

Export to Excel

Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	Counterparty Counterp
1189028066803728385	Distribution Agreement	General Contract Template		Jan 01,2023			United Re
1189025335976280065	Quality Control Contracts	General Contract Template	Apr 01,2023				
1189021413916155905	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 860 Days	Zember Pc

1

Page 1

of 1

1 - 3 of 3 items

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Zip Helpdesk

Dashboard

Tickets

Sites

To save the selected view just for yourself, choose the 'Keep Private' option and then click 'Save.' If you want the saved view to be visible to others, pick your preferred visibility option from the checklist.

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

GRIDLEX

Inbox
Zip Helpdesk
Zip CRM
Sky Accounting & ERP
Sky Expenses
Ray HRMS
Objects
Settings
My Account

Zolan

Zolan Internat...

Contracts

Create New Contract

Contract Settings

Saved Views

Save View

Clear Filters

Export to Excel

Contract ID	Contract Name	Contract Template	Contract Start	Contract Signature and	Contract End Date	Contract Due	Counterparty Counterp
1189025335976280065							
1189021413916155905					Dec 31,2025	Expires in 860 Days	Zember Pc
1189028066803728385							United Rec

1

Page 1

of 1

1 - 3 of 3 items

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Zip Helpdesk

Dashboard

Tickets

Sites

Save view

Name *

☐ Share With Zolan International Entity (Live) Entity ☐ Set as Default
☐ Share with specific Units only
☐ Share with specific Users only
☒ Keep Private - Just for me ☐ Set as Default

Cancel

Save

Note: The 'Hide' option in the 'Action' column is similar to 'Delete.'
However, you can retrieve hidden contracts by contacting
app@gridlex.com.

Congratulations! You have now learned how to utilize the contract 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 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.