

Welcome to our tutorial on creating and updating sections in Gridlex Zip CRM.

In Gridlex Zip CRM, Sections are designated areas where you can input specific information in different modules. These fields allow you to add relevant details.

This tutorial will walk you through creating and updating sections in Gridlex Zip CRM.

Step 1: Log in to your Gridlex App Suite account and click the "Zip CRM Settings" option under the Enterprise Admin tab.



Step 2: Scroll down and click 'Profiles' under the Profiles Section.

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Zip Helpdesk

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→ Organization Activity Template Map

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Profiles

- Profiles
- Map Profiles to Organizations
- Map Profiles to Contacts

Schedule Tasks

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- Schedule Templates Mapping to Unit

Default Address And Details

- Default Address for Organization
- Default Address for Contacts
- Default Details for Organization
- Default Details for Contacts

Step 3: Click 'Create Sections' from the menu bar.

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Zip Helpdesk

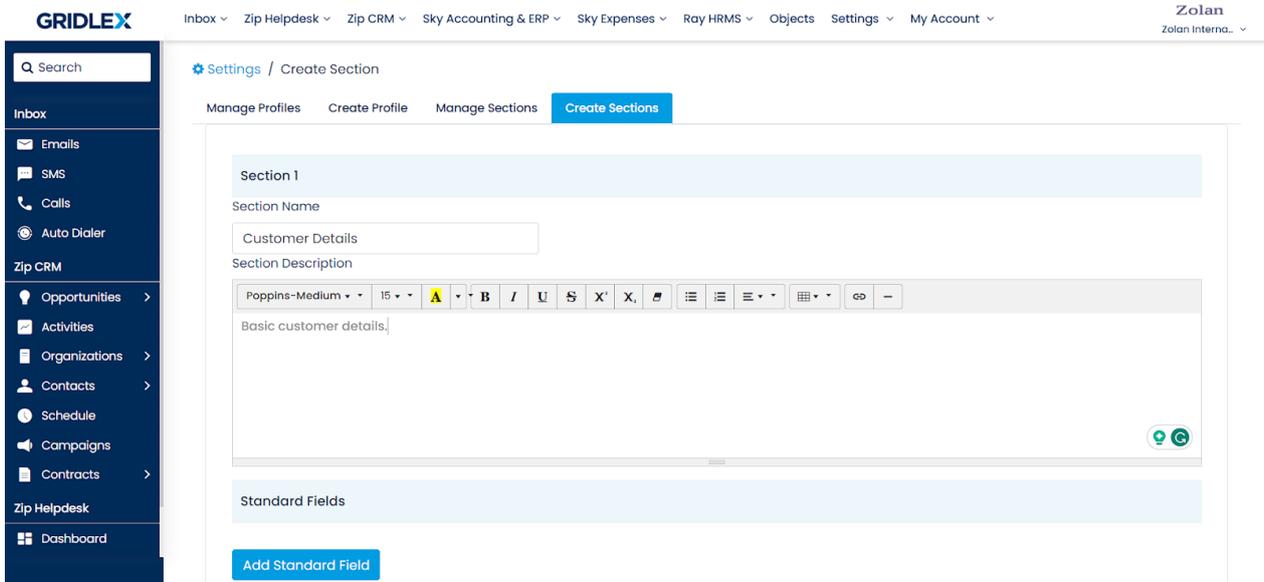
- Dashboard

Settings / Manage Profiles

Manage Profiles Create Profile Manage Sections **Create Sections**

Profile ID	Profile Name
1176050166575439873	Contact Profile
1178948507797872641	DEMO
11893594749668985601	Organization General Information
1186877939309166593	Support
1166284099443544065	Territory Details
1186884780210610177	Test
None	Organization/Contacts Profile Attributes

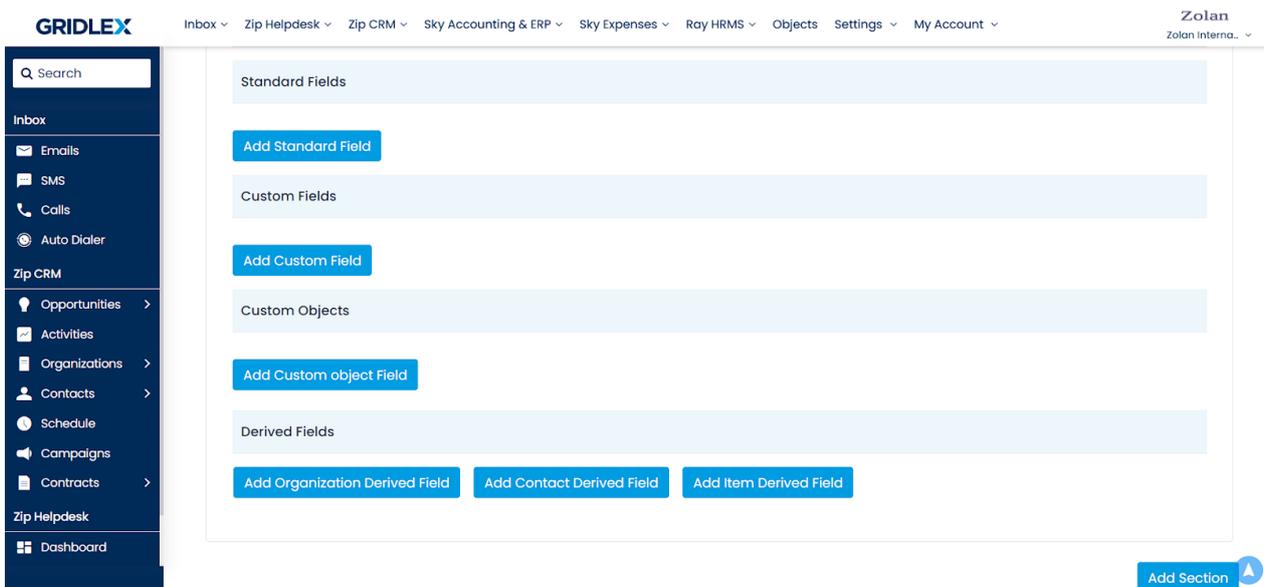
Step 4: Enter a name and description for your section and scroll down.



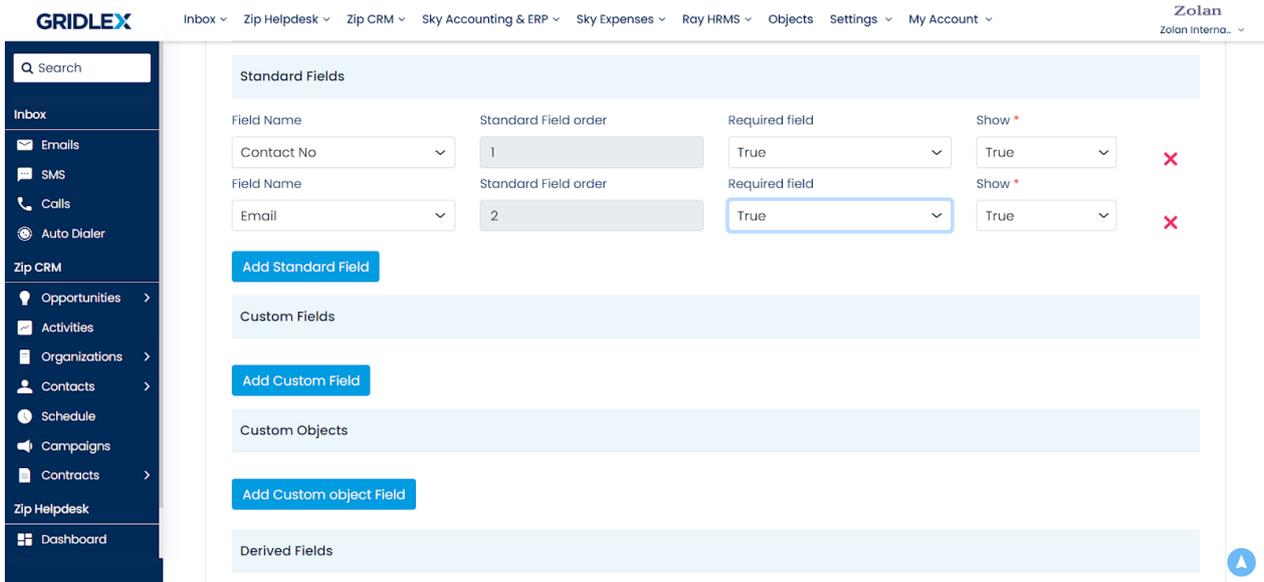
How to Add Standard Fields?

Step 5: Click 'Add Standard Field.'

Note: Please refer to this guide to understand Standard Fields: [What are Standard Fields in Gridlex Zip?](#)



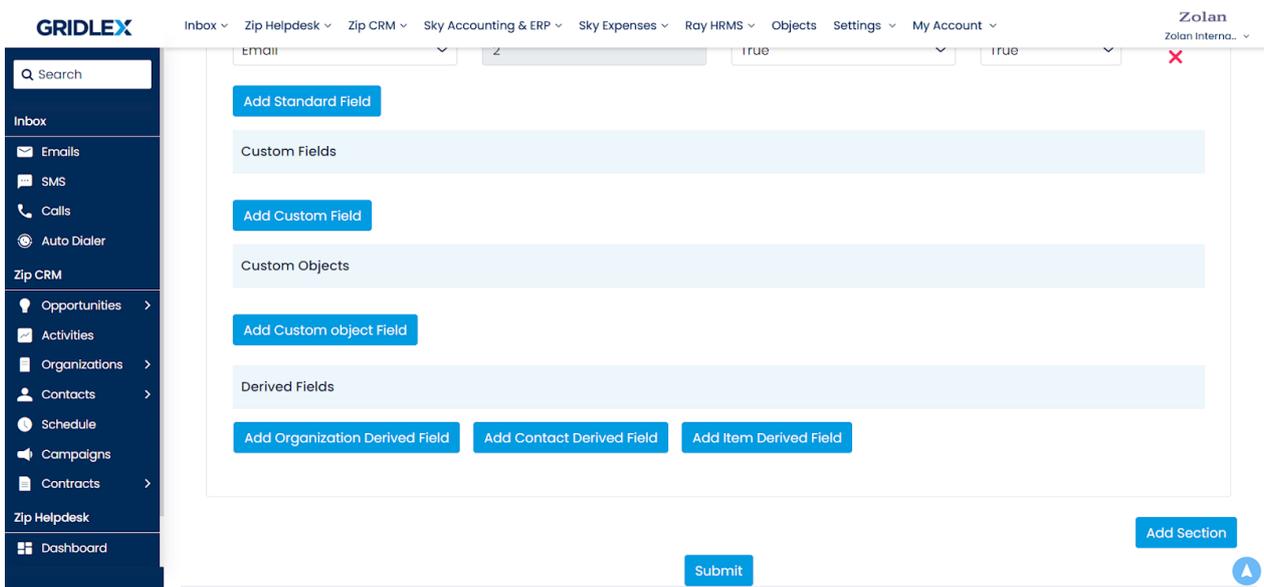
Step 6: Add standard fields as per your requirement and scroll down.



How to Add Custom Fields?

Step 7: Click 'Add Custom Field,'

Note: Please refer to this guide to understand Custom Fields: [How to Create Custom Fields in Gridlex App Suite?](#)



Step 8: Add custom fields per your requirement, and scroll down.

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Field Name	Custom Field order	Required field	Show *
Date	3	False	False

Add Custom Field

Custom Objects

Add Custom object Field

Derived Fields

Add Organization Derived Field | Add Contact Derived Field | Add Item Derived Field

Submit | Add Section

How to Add Custom Object Fields?

Step 9: Click 'Add Custom object Field.'

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Field Name	Custom Field order	Required field	Show *
Date	3	True	True

Add Custom Field

Custom Objects

Object Name	Custom Object order	Required field	Show *
-	4	False	False

Add Custom object Field

Derived Fields

Add Organization Derived Field | Add Contact Derived Field | Add Item Derived Field

Submit | Add Section

Step 10: Add custom objects per your requirement and scroll down.

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Field Name | Custom Field order | Required field | Show

Date	3	True	True
------	---	------	------

Add Custom Field

Custom Objects

Object Name	Custom Object order	Required field	Show
Address	4	True	True

Add Custom object Field

Derived Fields

Add Organization Derived Field | Add Contact Derived Field | Add Item Derived Field

Add Section | Submit

Step 11: Add derived field name and order as per your requirement and scroll down.

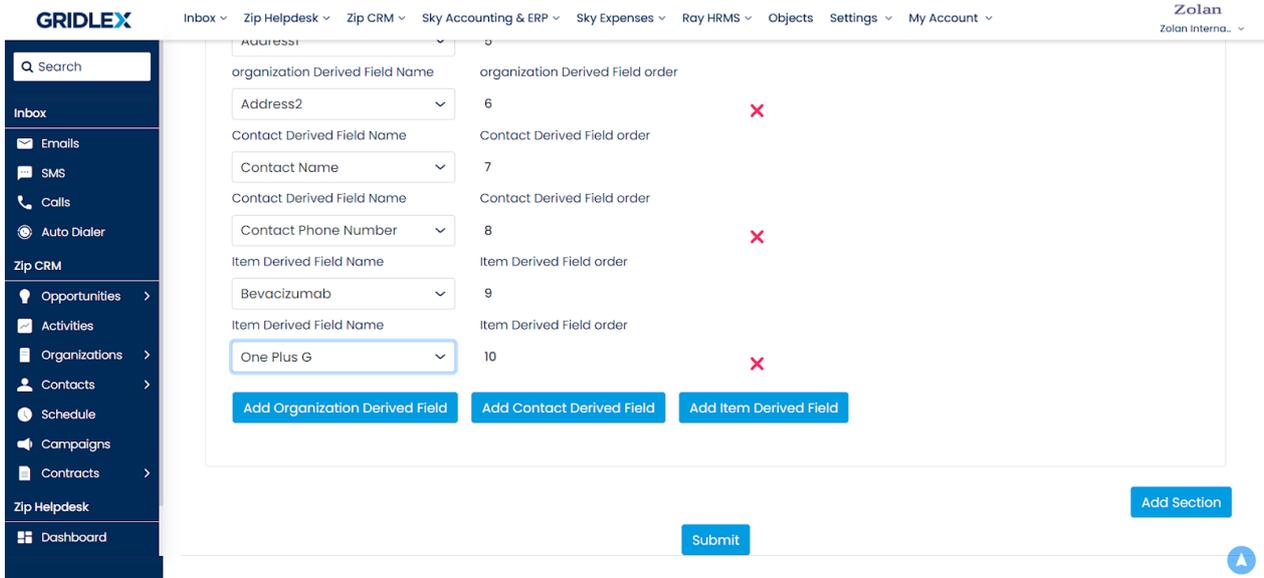
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Derived Fields

organization Derived Field Name	organization Derived Field order	Contact Derived Field Name	Contact Derived Field order	Item Derived Field Name	Item Derived Field order
Address1	5				
Address2	6		X		
Contact Name	7				
Contact Phone Number	8		X		
Bevacizumab	9				
One Plus G	10				X

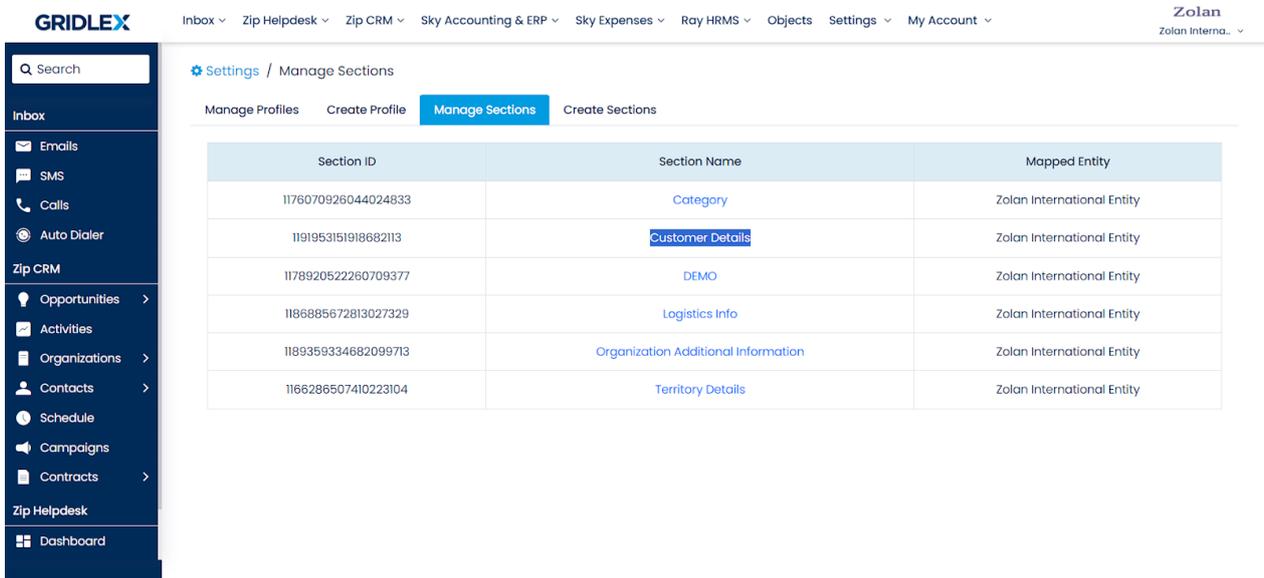
Add Organization Derived Field | Add Contact Derived Field | Add Item Derived Field

Step 12: If you want to add another section, click 'Add Section' on the bottom right. Click 'Submit' once you're done. Your section is now created.



How to Update Sections?

Step 13: Click 'Manage Sections' on the menu bar and select the section you want to update.



You can make changes to the section on this page.

