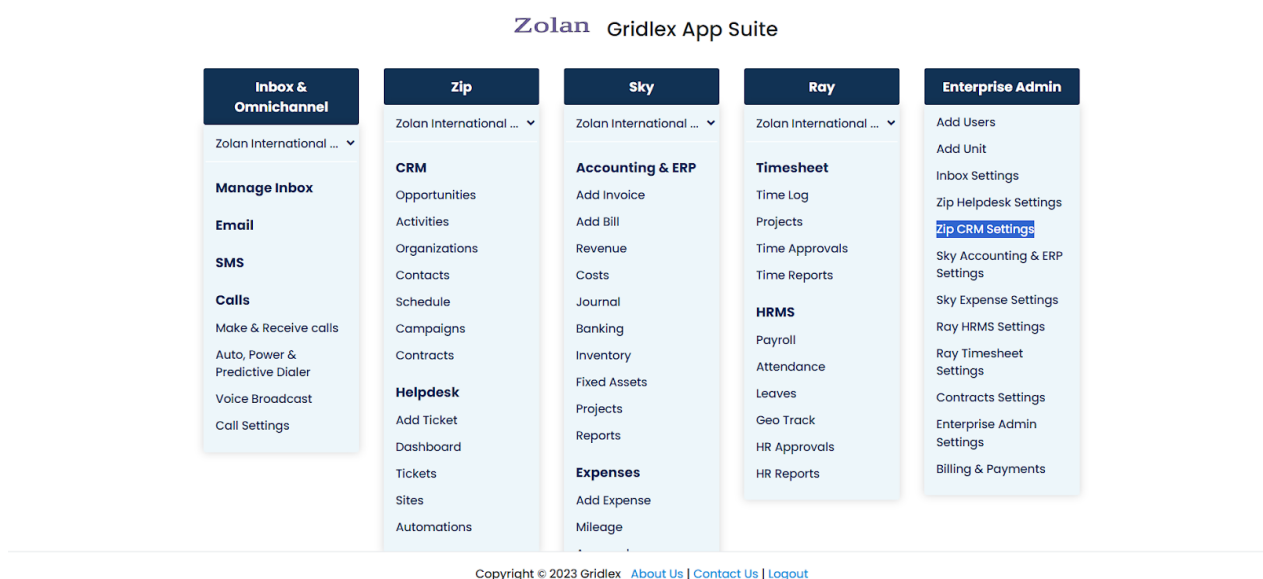


Welcome to our tutorial on creating and updating sections in Gridlex Zip CRM.

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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[Default Address for Organization](#)
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Step 3: Click 'Create Sections' from the menu bar.

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[Settings](#) / [Manage Profiles](#)

Manage Profiles

Create Profile

Manage Sections

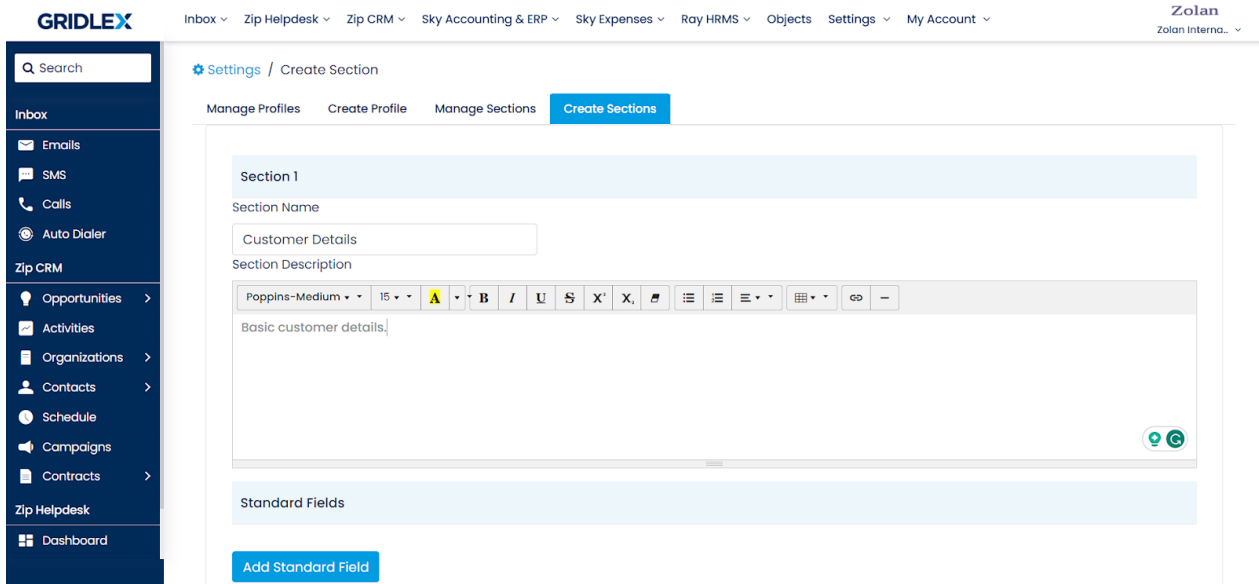
Create Sections

Profile ID	Profile Name
1176050166575439873	Contact Profile
1178948507797872641	DEMO
1189359474968985601	Organization General Information
1186877939309166593	Support
1166284099443544065	Territory Details
1186884780210610177	Test
None	Organization/Contacts Profile Attributes

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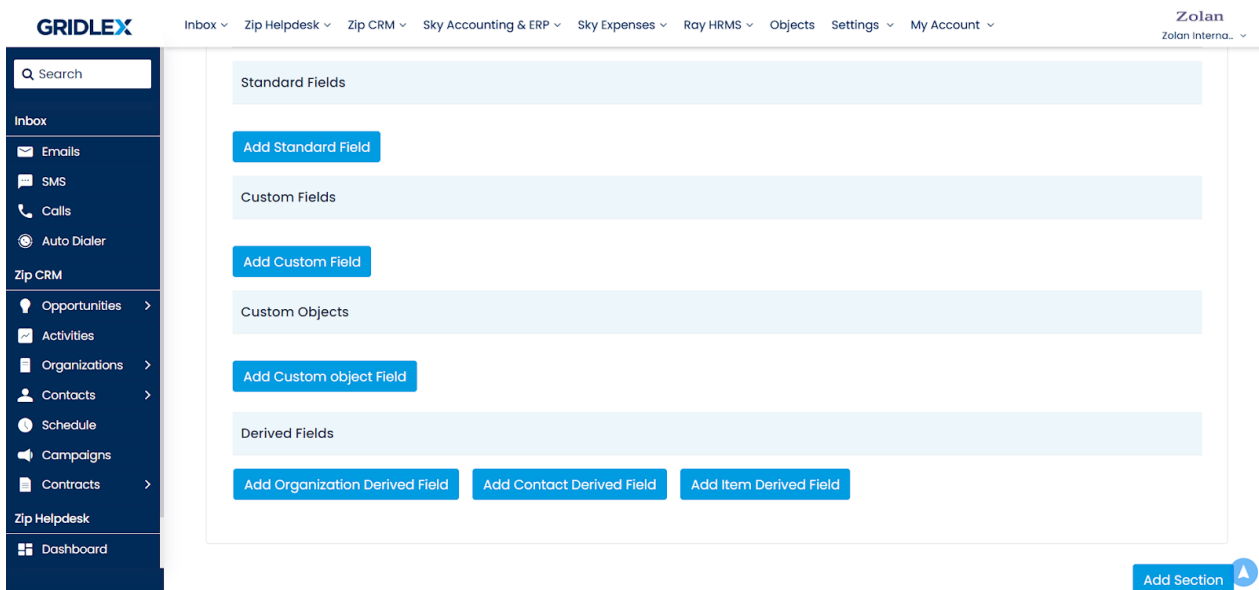
Step 4: Enter a name and description for your section and scroll down.



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.

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Zip Helpdesk

- Dashboard

Standard Fields

Field Name	Standard Field order	Required field	Show *	
Contact No ▾	1	True ▾	True ▾	✗
Email ▾	2	True ▾	True ▾	✗

Add Standard Field

Custom Fields

Add Custom Field

Custom Objects

Add Custom object Field

Derived Fields

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?](#)

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email

2

true

true

X

Add Standard Field

Custom Fields

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

▲

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

The screenshot shows the 'Custom Fields' configuration page in the GRIDLEX application. The left sidebar contains navigation links for 'Inbox', 'Emails', 'SMS', 'Calls', 'Auto Dialer', 'Zip CRM' (with sub-links for Opportunities, Activities, Organizations, Contacts, Schedule, Campaigns, and Contracts), 'Zip Helpdesk', and 'Dashboard'. The main content area is titled 'Custom Fields' and contains three sections: 'Custom Fields' (with a table showing a field named 'Date' at order 3, not required, and not shown), 'Custom Objects' (with an 'Add Custom object Field' button), and 'Derived Fields' (with buttons for 'Add Organization Derived Field', 'Add Contact Derived Field', and 'Add Item Derived Field'). At the bottom right, there are 'Add Section' and 'Submit' buttons.

How to Add Custom Object Fields?

Step 9: Click 'Add Custom object Field.'

This screenshot shows the 'Custom Fields' configuration page after adding a new custom object field. The 'Custom Fields' table now includes the 'Date' field and a new field with a 'preview' button. The 'Custom Objects' section now has an 'Add Custom object Field' button. The 'Derived Fields' section remains the same. The 'Submit' button is still present at the bottom right.

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

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Custom Fields

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				
Contact Name	7				
Contact Phone Number	8				
Bevacizumab	9				
One Plus G	10				

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

Add Section

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.

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Settings / Manage Sections / Section Edit - Customer Details

Section Name

Section ID

Entity

Customer Details

1191953151918682113

Zolan International Entity

Section Description

Poppins-Medium ▾ 15 ▾ **B** *I* U ~~S~~ ~~X'~~ ~~X~~

Basic customer details.

Standard Fields

Field Name

Standard Field order

Required Field

Show *

Contact No ▾

1

True ▾

True ▾

Field Name

Standard Field order

Required Field

Show *

Step 14: Once you have made the changes, scroll down to the bottom of the page and click 'Submit.' Your section is now updated

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Dashboard

Organization Derived Field Name	Organization Derived Field order	
Address2	6	
Contact Derived Field Name	Contact Derived Field Order	
Contact Name	7	
Contact Derived Field Name	Contact Derived Field Order	
Contact Phone Number	8	
Item Derived Field Name	Item Derived Field Order	
Bevacizumab	9	
Item Derived Field Name	Item Derived Field Order	
One Plus G	10	

Add Organization Derived Field

Add Contact Derived Field

Add Item Derived Field

Submit

Congratulations! You have now learned how to create and update sections in Gridlex Zip CRM.

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.

