How to Create Record Sections in Gridlex Zip?

Follow the below steps to create record sections in Gridlex Zip.

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

Step 2: Navigate to the “Models and Workflows Settings” tab and click “Manage Models.”

Step 3: From the menu bar, click on “Create Section.”

Step 4: First, add the section name. Here, as an example, we are adding a section named ‘Employment Details.’

Step 5: Select the field name from the “Custom Fields” tab.

Step 6: From the dropdown under the “Required Field” tab, select True if you want to set this field as required/mandatory; if not, select False. Repeat the same for “Show * to denote this is a required field.”

Note: You can fix a particular text or number in the Default Value field, making it uneditable during record creation.

Step 7: You can add as many fields as you want by clicking the “Add” icon. Here, we have added two more fields: Department and Office Location.

Note: If you want to create custom fields as per your requirement, refer to this guide: How to Create Custom Fields in Gridlex App Suite?

Step 8: Scroll to the “Custom Objects” tab and select the object name from the drop-down. Add true or false as you did for custom fields.

Step 9: Similar to custom fields, you can click “Add” to insert more custom objects.

Note: If you want to create custom objects as per your requirement, refer to this guide: How to Create Custom Object in Gridlex App Suite?

Step 10: Once you are done, click “Create.” Your record section has been created.

How to Edit Record Sections in Gridlex Zip?

Follow the below steps to create record sections in Gridlex Zip.

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

Step 2: Navigate to the “Models and Workflows Settings” tab and click “Manage Models.”

Step 3: From the menu bar, click on “Manage Sections.”

Step 4: Click on the record section that you would like to edit.

Step 5: Make changes wherever required (here, we have added the “Contact No” field to the section). Once you are done, click “Update.”

Step 6: Be aware that when you edit or update a record section, the changes will be reflected in all record templates and records that use these templates. Click “Yes! Update” if you still want to update the section.

Your record section is updated, and in this example, a new field is added.

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.