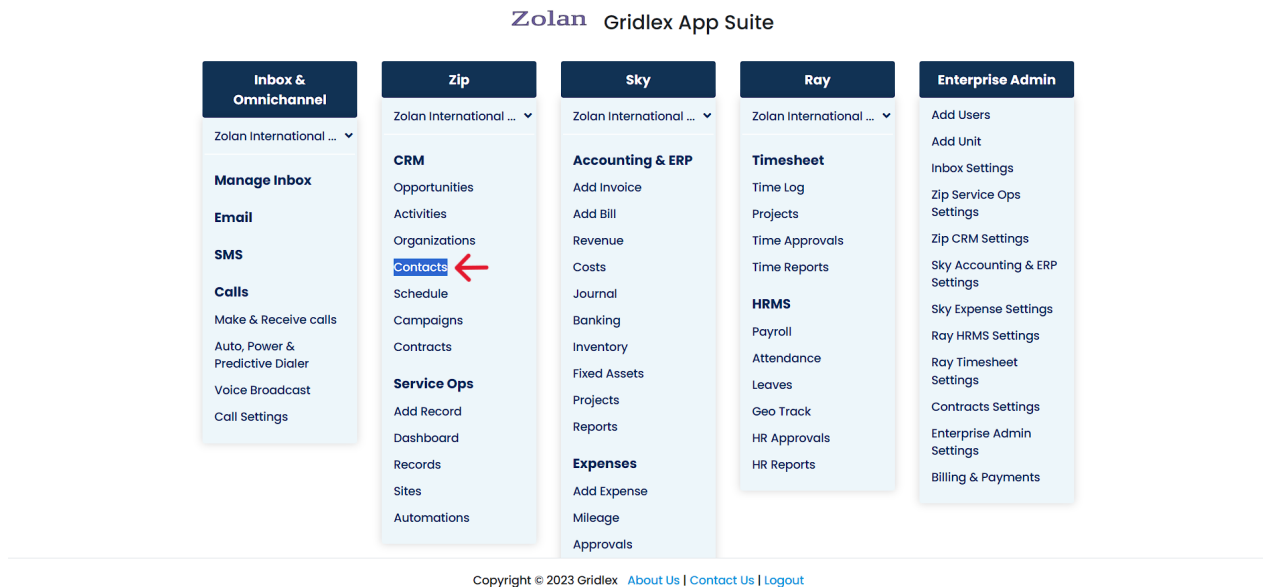


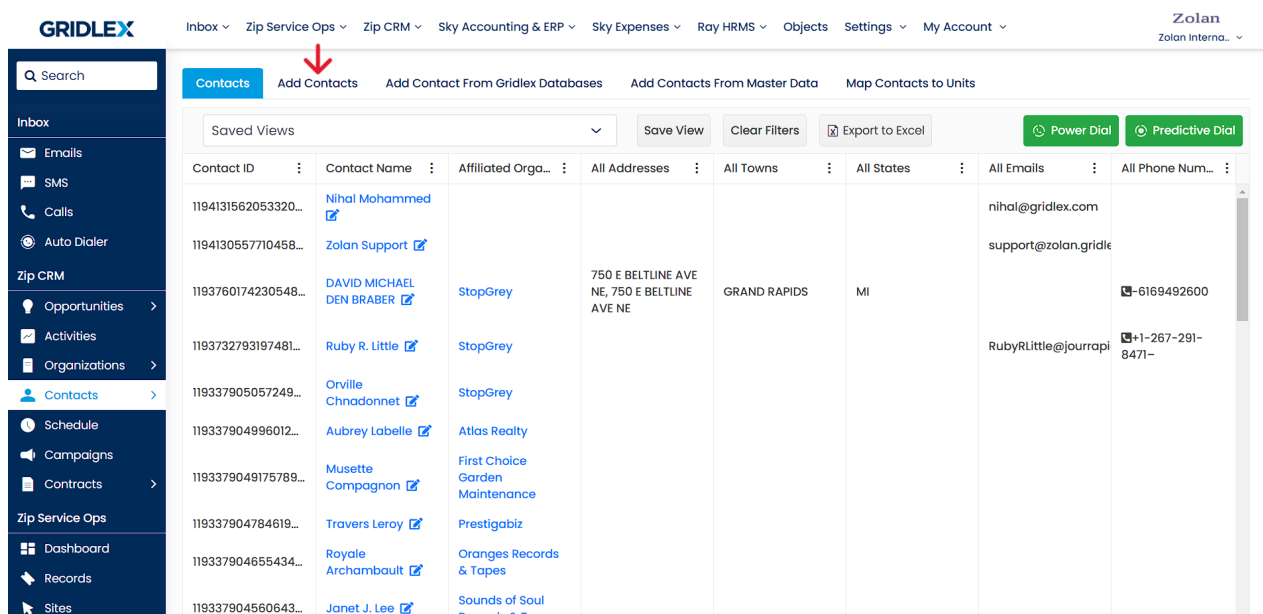
In Gridlex Zip, there are multiple ways to add contacts: manually, by importing, or through the organization page. This guide will specifically explain the process of adding a contact manually.

Step 1: Log in to the Gridlex App Suite and click on 'Contacts' located under the Zip section.



Step 2: Once you're on the Contacts page, you'll see an option to "Add Contacts." Click on it to proceed.

Note: The availability of this feature depends on your assigned permissions. If you don't have the permission to view or add contacts, you'll be unable to do so. To obtain access, please reach out to your enterprise admin.



Step 3: A form will appear, prompting you for the contact's information.

Take the time to input details such as the contact name, title, notes, contact methods (like phone or email), address, and any other relevant information.

GRIDLEX Inbox ▾ Zip Service Ops ▾ Zip CRM ▾ Sky Accounting & ERP ▾ Sky Expenses ▾ Ray HRMS ▾ Objects Settings ▾ My Account ▾ **Zolan**
Zolan Internat...

Search Contacts **Add Contacts** Add Contact From Gridlex Databases Add Contacts From Master Data Map Contacts to Units

Add New Contact Import Previous File Imports Import Logs

Basic Information

Contact Name First Name Middle Name Last Name

Brandon Brown Brandon Brown

Title

Mr

Visible to *

Visible to all units Visible to selected units

Affiliate Organization

Organization Name Phone Number Email City/Town State

Search for a organization (770) 770-47078 Email Canton Georgia(GA)

Submit

Step 4: To affiliate an organization to the contact, search for the organization in the search bar and select it.

GRIDLEX Inbox ▾ Zip Service Ops ▾ Zip CRM ▾ Sky Accounting & ERP ▾ Sky Expenses ▾ Ray HRMS ▾ Objects Settings ▾ My Account ▾ **Zolan**
Zolan Internat...

Search Brandon Brown Brown

Title

Mr

Visible to *

Visible to all units Visible to selected units

Affiliate Organization

Organization Name Phone Number Email City/Town State

Search for a organization (201) 555-0123 Email City/Town State

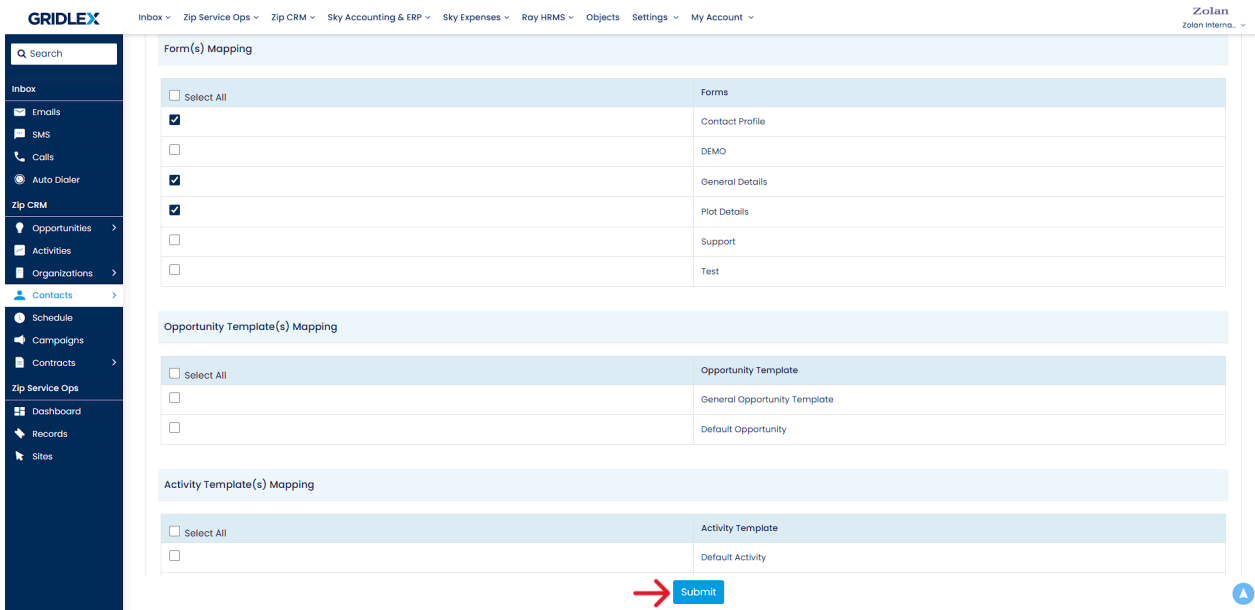
True Health

True Health

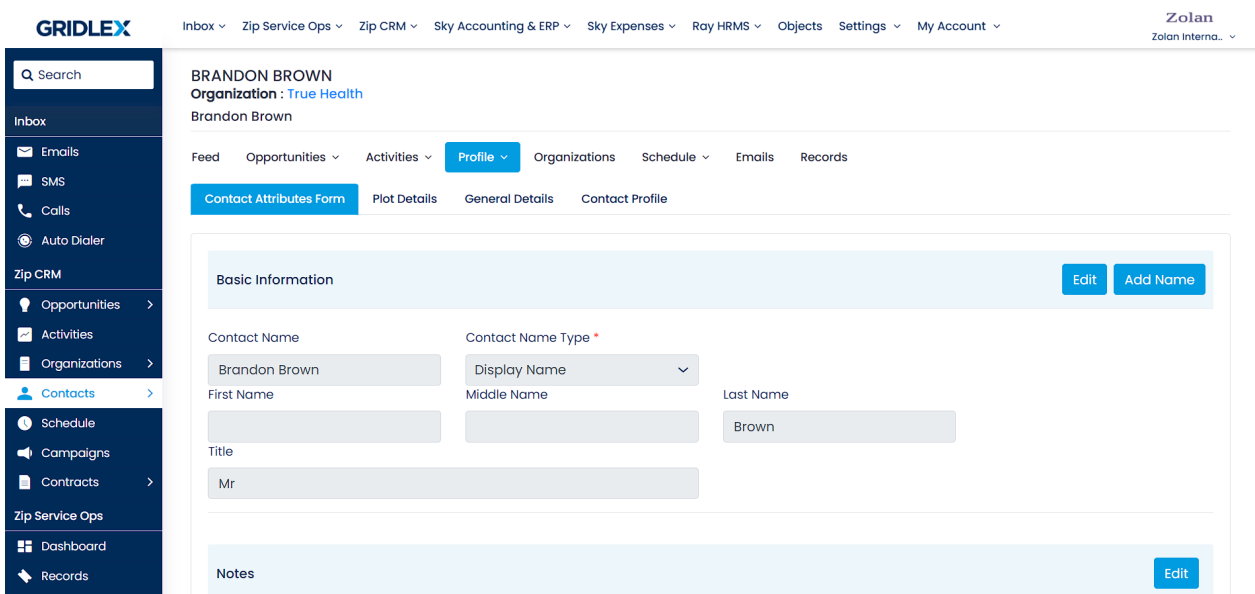
Poppins-Medium 15 **B** *I* U ~~X~~ X

Submit

Step 5: Scroll down to find options for mapping your new contact. Choose the correct forms, opportunity templates, and activity templates for the contact. Once done, click on the “Submit” button to save the contact.



Step 6: Your contact has been successfully added to Gridlex Zip. Should you need to make any changes in the future, remember you have the flexibility to edit this contact's information anytime you want.



Now, you're adept at manually adding contacts within the Gridlex Zip platform. If you're interested in other ways to manage contacts, such as importing and adding multiple contacts at once, follow this guide: [How to Import Contacts in Gridlex Zip?](#)

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.

