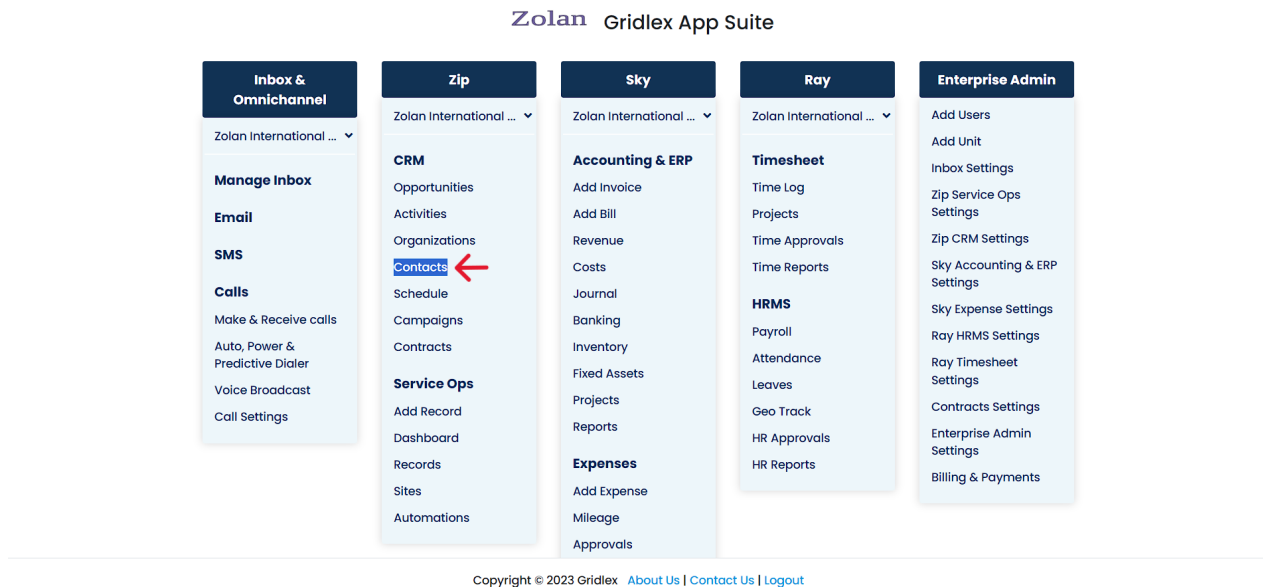


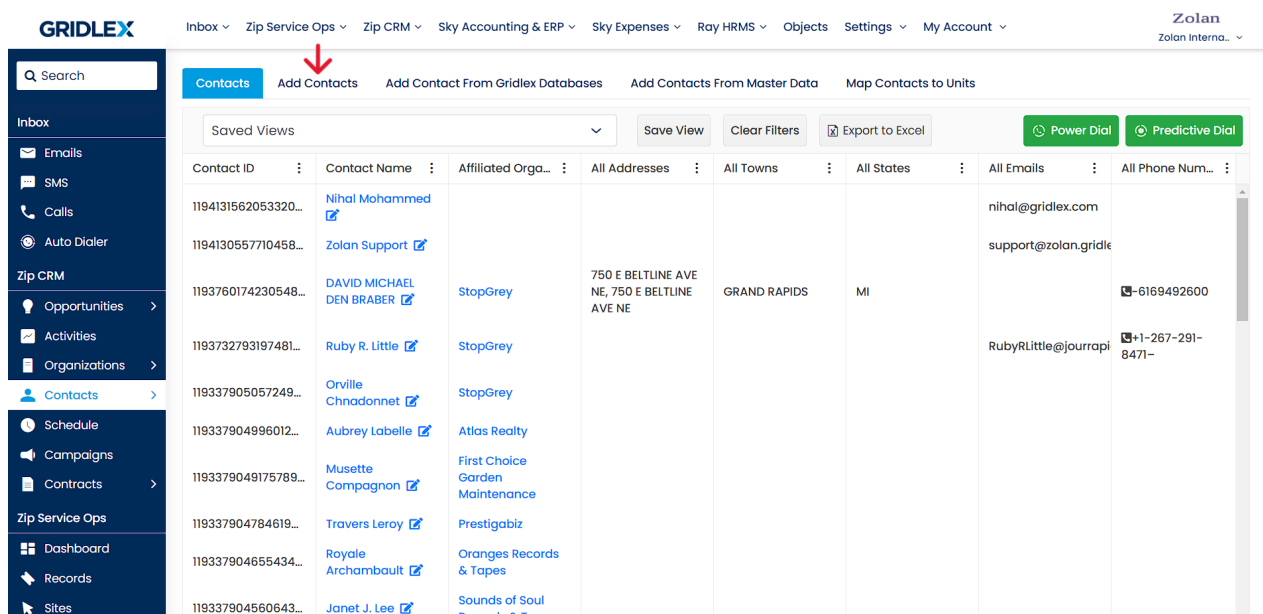
In Gridlex Zip, there are multiple ways to add contacts: manually, by importing, or through the organization page. This guide will specifically explain the process of adding a contact manually.

**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) 704-7078    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

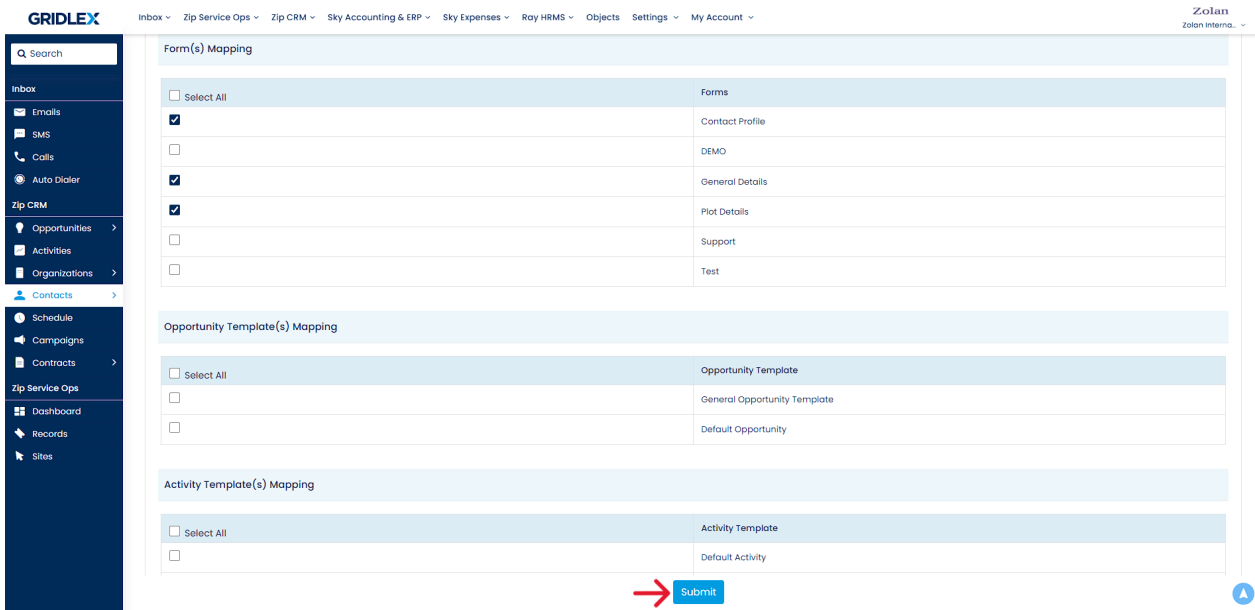
Search for a organization    (201) 555-0123    Email    City/Town    State

True Health

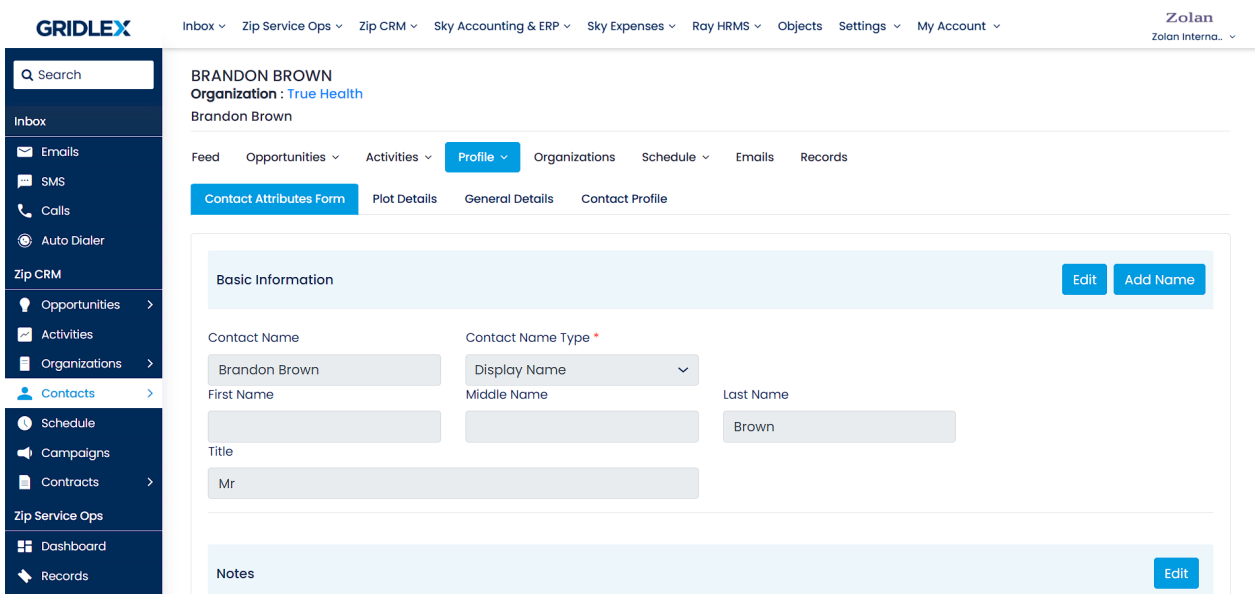
True Health

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](mailto: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.

