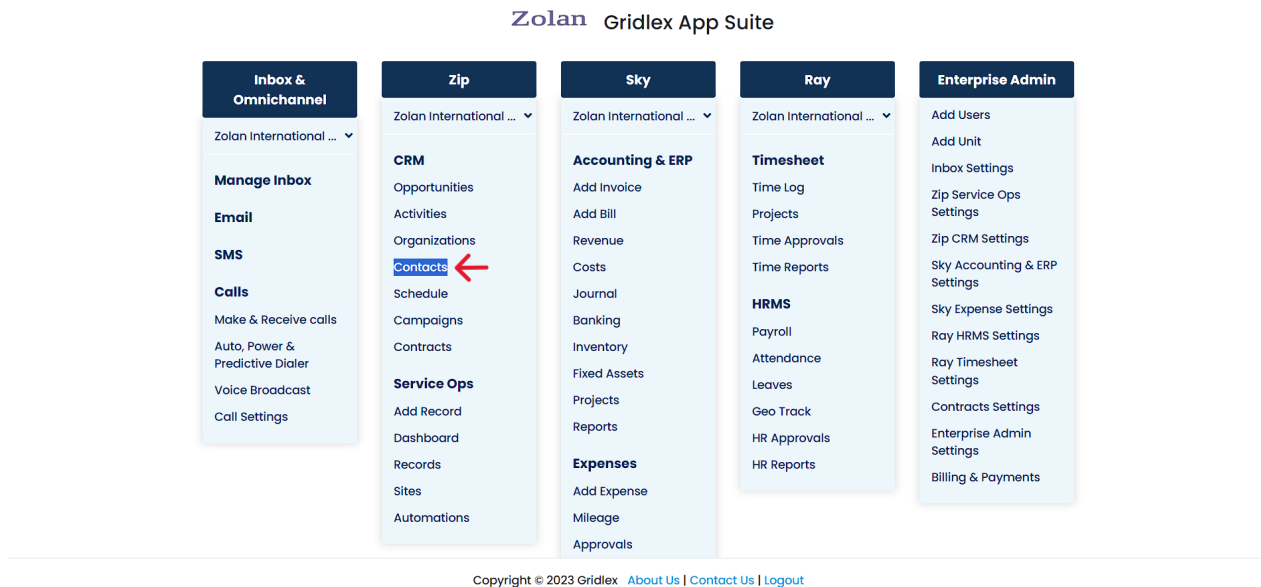


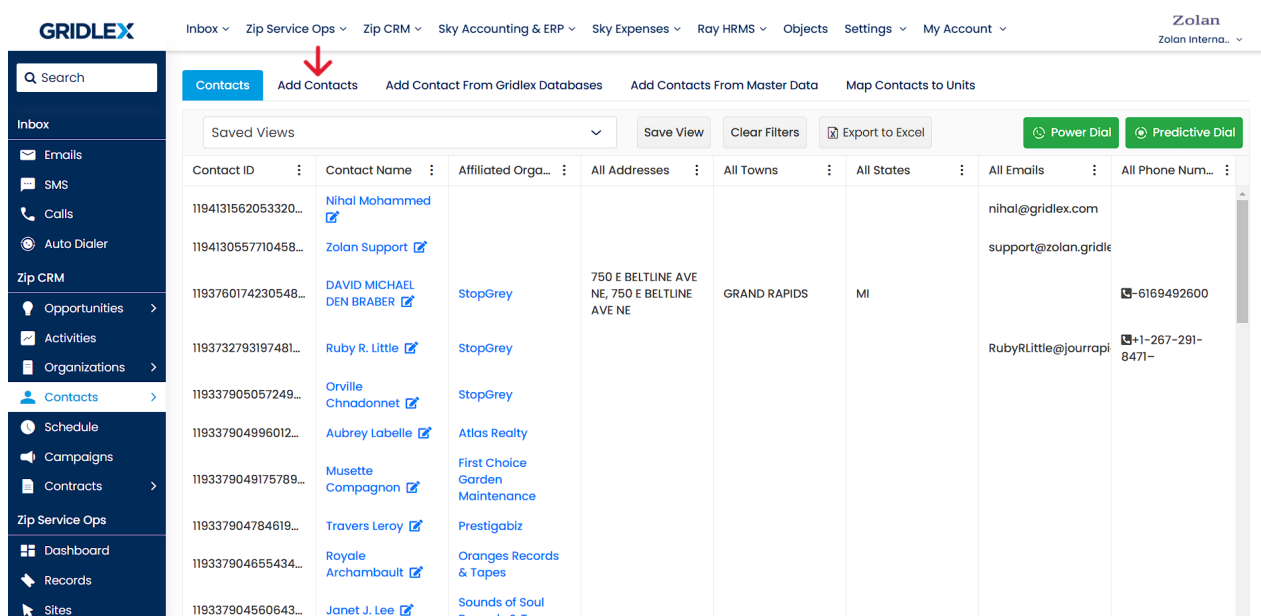
In Gridlex Zip, there are multiple ways to add contacts: manually, by importing, or through the organization page. This guide will specifically explain the process of adding a contact manually.

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.

Gridlex

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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

7707047078

Email

Canton

Georgia(GA)

Submit

GRIDLEX

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

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Zip CRM

Opportunities >

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Organizations >

Contacts >

Schedule

Campaigns

Contracts >

Zip Service Ops

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Sites

Brandon Brown

Title

Mr

Visible to *
☒ Visible to all units ☐ Visible to selected units

Affiliate Organization

Organization Name
Search for a organization
True Health

Phone Number
(201) 555-0123

Email
Email

City/Town
City/Town

State
State

Poppins - Medium ▾ 15 ▾ A B I U X' X_s [Table Icons]

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.

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Q Search

Form(s) Mapping

Select All	Forms
<input checked="" type="checkbox"/>	Contact Profile
<input type="checkbox"/>	DEMO
<input checked="" type="checkbox"/>	General Details
<input checked="" type="checkbox"/>	Plot Details
<input type="checkbox"/>	Support
<input type="checkbox"/>	Test

Opportunity Template(s) Mapping

Select All	Opportunity Template
<input type="checkbox"/>	General Opportunity Template
<input type="checkbox"/>	Default Opportunity

Activity Template(s) Mapping

Select All	Activity Template
<input type="checkbox"/>	Default Activity

Submit

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.

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Q Search

BRANDON BROWN
Organization : True Health
Brandon Brown

Feed Opportunities ▾ Activities ▾ Profile ▾ Organizations Schedule ▾ Emails Records

Contact Attributes Form Plot Details General Details Contact Profile

Basic Information Edit Add Name

Contact Name Contact Name Type *

Brandon Brown Display Name ▾

First Name Middle Name Last Name

Mr

Notes Edit

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.

