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.



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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.

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🞽 Emails						:				
SMS	Contact ID :	Contact Name	Affiliated Orga	All Addresses	All Towns	:	All States	:	All Emails	All Phone Num
📞 Calls	1194131562053320	Nihal Mohammed							nihal@gridlex.con	ı
🕒 Auto Dialer	1194130557710458	Zolan Support 📝							support@zolan.gr	idle
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Opportunities >	1193760174230548	DEN BRABER 🗹	StopGrey	NE, 750 E BELTLINE AVE NE	GRAND RAPIDS		МІ			U -6169492600
Z Activities	1193732793197481	Ruby R. Little 📝	StopGrey						RubyRLittle@journ	S +1-267-291-
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💄 Contacts 💦 🔶	119337905057249	Orville Chnadonnet 🗹	StopGrey							
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Zip Service Ops	119337904784619	Travers Leroy 📝	Prestigabiz							
- Dashboard	119337904655434	Royale	Oranges Records							
🔷 Records	119337904055434	Archambault 🗹	& Tapes							
🖹 Sites	119337904560643	Janet J. Lee 📝	Sounds of Soul							

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 ~ Sk	y Accounting & ERP ~ Sky Expenses ~	Ray HRMS ~ Objects Settings	My Account ~ Zolan Zolan Internet
Q Search	Contacts Add Contacts Add Contact	ct From Gridlex Databases Add Cor	ntacts From Master Data Map Con	tacts to Units
Inbox	Add New Contact Import Previous F	ile Imports Import Logs		
🞦 Emails		1 1 0		
SMS	Basic Information			
📞 Calls	Contact Name	First Name	Middle Name	Last Name
O Auto Dialer			Middle Norrie	
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	Search for a organization 🚽 💻	7707047078 Email	Canton	Georgia(GA)
Zip Service Ops		Lindi	ountoin	000.gld(0A)
Dashboard				
📏 Records			Submit	
Sites				

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 Interna v
Q Search	Brandon Brown Brown	
Inbox	Title	
Semails	Mr	
SMS	Visible to *	
📞 Calls	Visible to all units O Visible to selected units	
Auto Dialer	Affiliate Organization	
Zip CRM		
Opportunities >	Organization Name Phone Number Email City/Town State Search for a organization 	
Activities	Search for a organization * = (201) 555-0123 Email City/Town State	
Organizations >	True Health	
Contacts		
Schedule	Poppins-Medium • 15 • 👗 • B / U S X • X, 8 ≔ ≔ = • -	
Campaigns Contracts		
Zip Service Ops		
Dashboard		
 Records 		
Sites		
	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.

GRIDLEX	Inbox - Zip Service Ops - Zip CRM - Sky Accounting & ERP - Sky Expenses - Ray	/HRMS ~ Objects Settings ~ My Account ~	Zolan Zolan Interna_ ~	
Q Search	Form(s) Mapping			
Inbox	Select All	Forms		
🖂 Emails		Contact Profile		
📁 SMS				
📞 Calls		DEMO		
Auto Dialer		General Details		
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♀ Opportunities > ✓ Activities		Support		
Organizations >		Test		
Contacts >				
🕔 Schedule	Opportunity Template(s) Mapping			
Campaigns	all and a second s			
Contracts	Select All	Opportunity Template		
Zip Service Ops		General Opportunity Template		
Dashboard		Defecto Deservice for		
Records		Default Opportunity		
🔓 Sites				
	Activity Template(s) Mapping			
	Select All	Activity Template		
		Default Activity		

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.

GRIDLEX	Inbox × Zip Service Ops × Zip CRM × Sky Accounting & ERP × Sky Expenses × Ray HRMS × Objects Settings × My Account ×	Zolan Zolan Interna V
Q Search	BRANDON BROWN Organization : True Health	
Inbox	Brandon Brown	
😁 Emails	Feed Opportunities - Activities - Profile - Organizations Schedule - Emails Records	
SMS		
📞 Calls	Contact Attributes Form Plot Details General Details Contact Profile	
💿 Auto Dialer		
Zip CRM	Basic Information	Edit Add Name
Opportunities >		
- Activities	Contact Name Contact Name Type *	
Organizations >	Brandon Brown Display Name 🗸	
Left Contacts	First Name Middle Name Last Name	
🕔 Schedule	Brown	
┥ Campaigns	Title	
Contracts >	Mr	
Zip Service Ops		
Dashboard		
Records	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: <u>How to Import Contacts in Gridlex Zip?</u>

If you need any help with any feature, data migration of your old data, or anything at all, just email <u>apps@gridlex.com</u> 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.