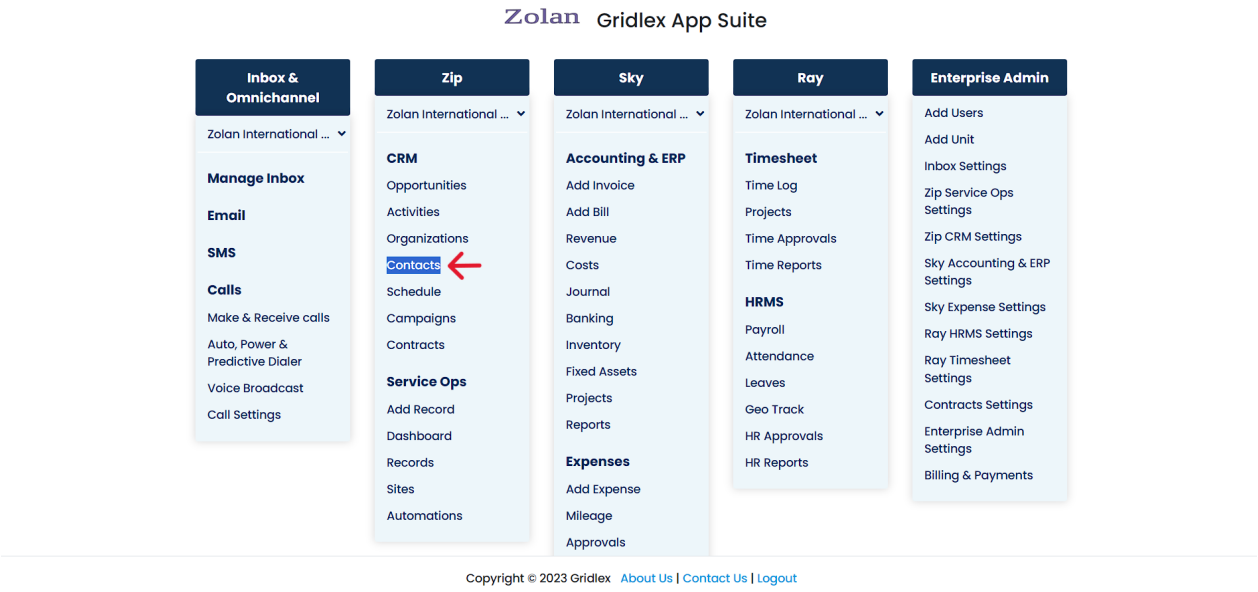
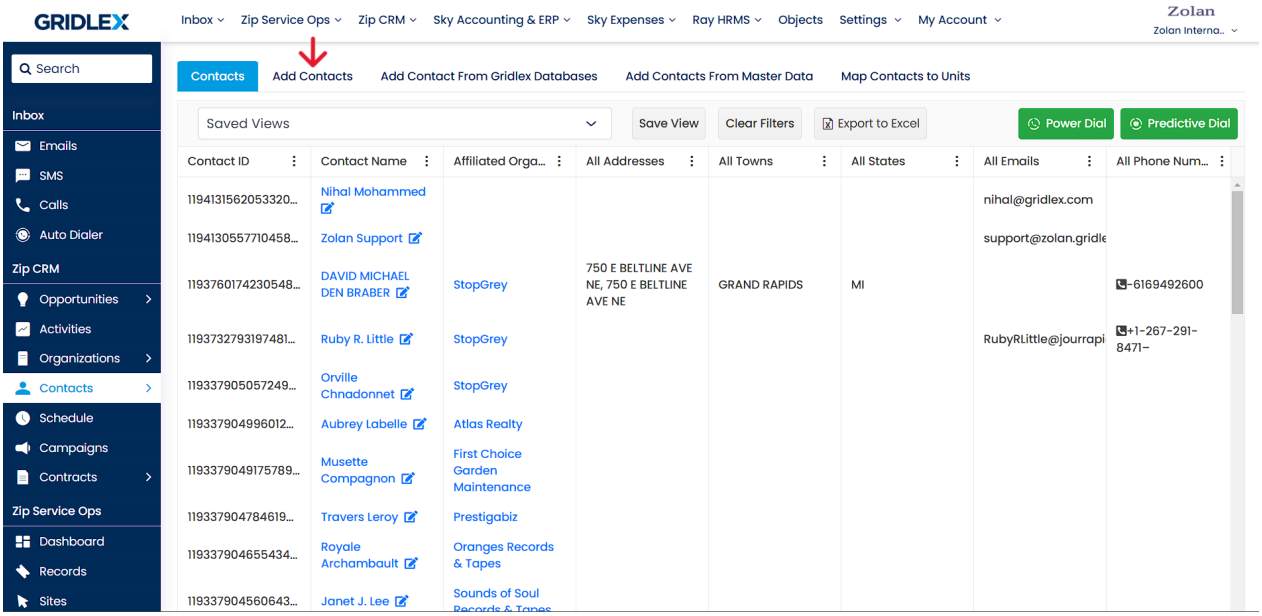
In Gridlex Zip, there are multiple ways to add contacts: manually, by importing, or through the organization page. This guide will specifically explain the process of adding a contact manually.

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



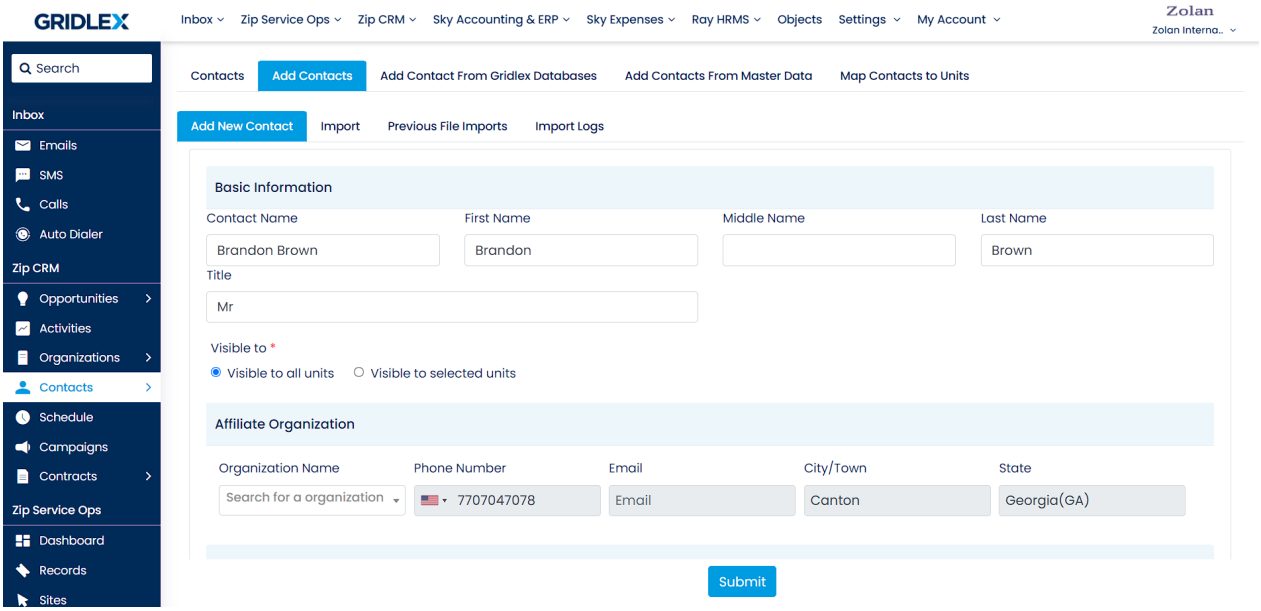
Step 2: Once you're on the Contacts page, you'll see an option to “Add Contacts.” Click on it to proceed.

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.

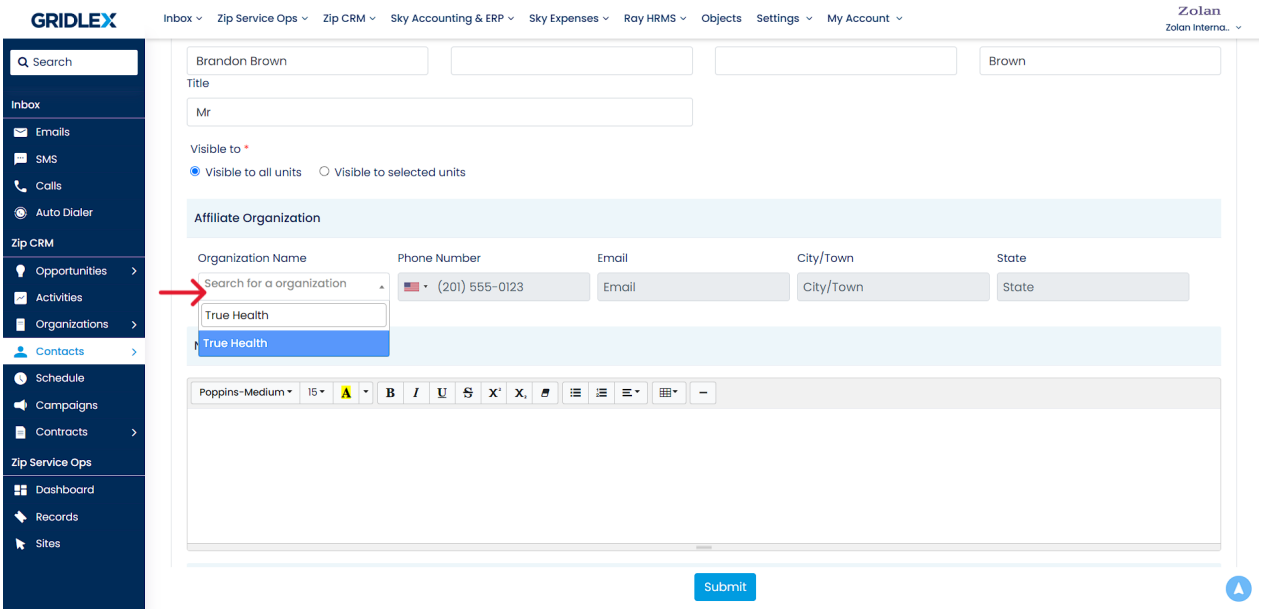


Step 3: A form will appear, prompting you for the contact's information.

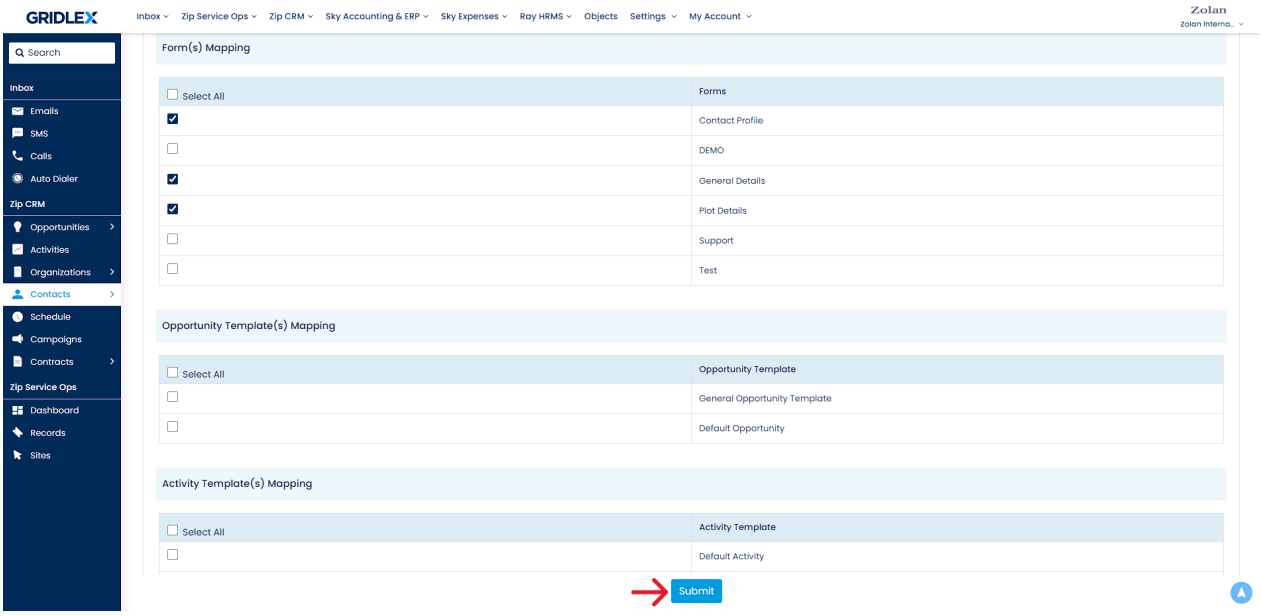
Take the time to input details such as the contact name, title, notes, contact methods (like phone or email), address, and any other relevant information.



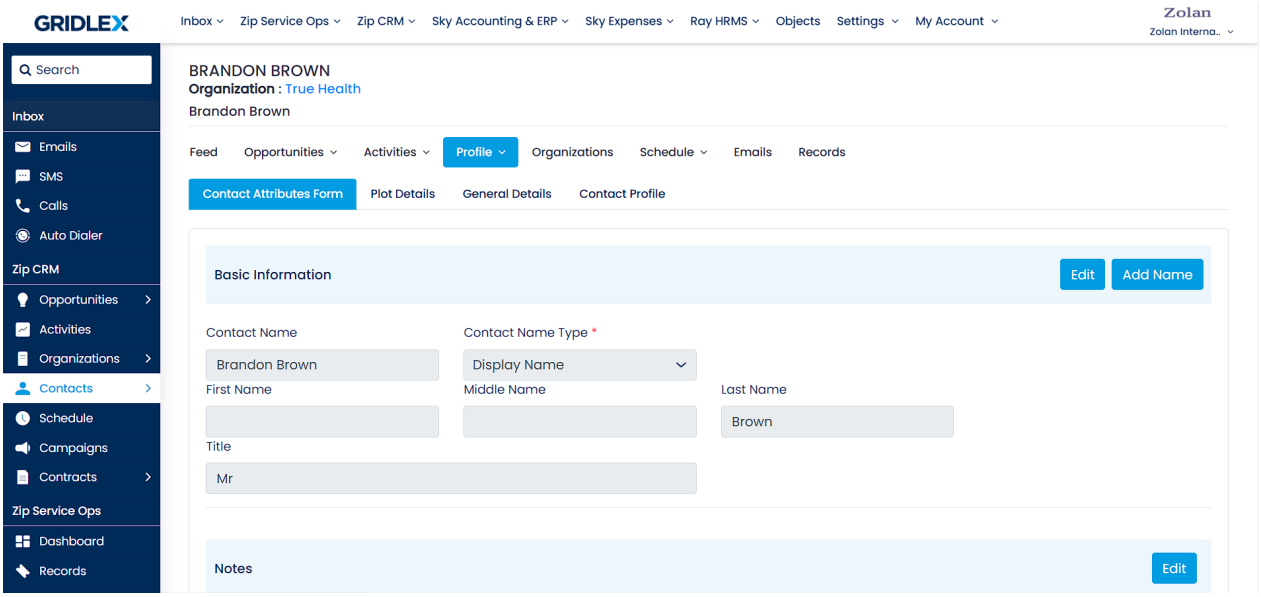
Step 4: To affiliate an organization to the contact, search for the organization in the search bar and select it.



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.