

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 multiple contacts by importing contacts in the system.

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

Step 2: After clicking on "Contacts," you will be redirected to the contacts page. Look for the "Add Contacts" option on the top navigation bar and click on it.

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: On the "Add Contacts" page, you will see an option to "Import" contacts. Click on the "Import" button to initiate the import process. Before proceeding, you can download the sample file to understand the format that is supported by the system.

Step 4: Once you have downloaded the sample file, review its format to ensure your data aligns with the system's requirements. For example, here you can view the data:

Step 5: Choose the file with your contacts and upload it to the system. The time taken for the upload will depend on the number of contacts being imported. Map the fields in your spreadsheet to corresponding fields in the system. For example, map the "City" field to "Contact Home City or Town 1" in the system. Click on the "Map" button after mapping is complete.

The screenshot displays the Gridlex CRM interface during a contact import process. The top navigation bar includes 'GRIDLEX' and various menu items like 'Inbox', 'Zip Service Ops', 'Zip CRM', 'Sky Accounting & ERP', 'Sky Expenses', 'Ray HRMS', 'Objects', 'Settings', and 'My Account'. The user is logged in as 'Zolan Zolan Intern...'. The main content area shows a progress bar with three steps: 1: Upload (completed), 2: Mapping (current step), and 3: Finish. Below the progress bar is a table for mapping imported file columns to template columns. The table has two columns: 'Imported file columns' and 'Template columns'. The rows are: Contact Name, Contact Email, Contact Number, City, and Country. Each row has a dropdown menu in the 'Template columns' column. A 'Map' button is located at the bottom center of the table area.

Step 6: After a successful upload, you will receive a notification confirming the completion to your registered email address. Once the contacts are uploaded and mapped, you can view the data on the screen. Click on the "Details" link at the end of each column to view more information about the contacts.

Step 7: Click on "View Data" to see the contacts that have been successfully uploaded into the system.

By following the above steps, you'll have imported your contacts into Gridlex Zip efficiently.

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.