This guide provides instructions on how to add users to the Gridlex System, allowing them access to various applications and functionalities within the system.

Step 1: Log in to Gridlex and click on the "Add Users" tab located under the Enterprise Admin section.

Inbox &	Zip	Sky	Ray	Enterprise Admii	
Omnichannei	Zolan International 🐱	Zolan International 👻	Zolan International 🗸	Add Users	
Zolan International 👻				Add Unit	
	CRM	Accounting & ERP	Timesheet	Inbox Settings	
Manage Inbox	Opportunities	Add Invoice	Time Log	Zip Helpdesk Setting	
Email	Activities	Add Bill	Projects	Zip CRM Settings	
Child.	Organizations	nizations Revenue Time		Sky Accounting & ER	
5M2	Contacts	Costs	Time Reports	Settings	
Calls	Schedule	Journal	HDMS	Sky Expense Settings	
Make & Receive calls	Campaigns	Banking	Degrad	Ray HRMS Settings	
Auto, Power &	Contracts	Inventory	Attendence	Ray Timesheet	
Predictive Dialer	Halpdook	Fixed Assets	Attendance	Settings	
Voice Broadcast	Helpdesk	Projects	Leaves	Contracts Settings	
Call Settings	Add Ticket	Reports	Geo Track	Enterprise Admin	
	Dashboard		HR Approvals	settings	
	Tickets	Expenses	HR Reports	Billing & Payments	
	Sites	Add Expense			
	Automations	Mileage			
		Approvals			

Step 2: After clicking on the "Add Users" tab, you will be directed to a page where you can add user details. Enter the First and Last name of the user you want to add to the system. Then, you have two options to identify the user: either enter their work email or their name.

Note: If you choose to enter the user's name, ensure that you also provide their work email in the designated "Work Email Field" provided below the name.

GRIDLEX	Inbox - Zip Helpdesk -	Zip CRM \sim $$ Sky Accounting & ERP \sim $$ Sky Expenses \sim	Ray HRMS ~ Objects Settin	gs ~ My Account ~ Zola:	n
Enterprise Admin Conganizations Contacts Items Users Users Units	Users Add Users First Name * Phone	Last Name *	Username * ruth@zolan.com	Password *	
Pricing Project Custom UX	Map User to the Units		Super Admin This permission makes use enterprise Filter by App	r admin for the • Filter by Entity	×
Settings	Map User to Unit	Entity : Unit Name Zolan International Entity : Super Admin	Add Unit	Apps Mapped to Unit Gridlex Sky Expense Mangement, Gridlex Sky Accounting, Gridlex Zip CRM, Gridlex Zip Contract Management,	•
		Zolan International Entity : Zolan Ray	€	Gridlex Ray HRMS,	

Step 3: Carefully consider whether the user should be granted Super Admin access. If you wish to make the user a Super Admin and give them access to all applications without any restrictions, check the appropriate box provided on the page.

Note: Super Admin access provides extensive privileges, so exercise caution before designating a user as a Super Admin.

Users Add Users			
First Name *	Last Name *	Username *	Password •
Ruth	Parker	ruth@zolan.com	•••••
Phone	Work Email		
		Super Admin This permission makes user admin for the enterprise	

Step 4: Select the appropriate unit for the user by checking the corresponding box on the page. This step is mandatory as users must be assigned to specific units to access the system unless they are given Super Admin privileges. Once you've selected the unit, click on the "Add" button to proceed.

nin	Map User to the Units		Filter by App	Zolan International Entity
ations	Map User to Unit	Entity : Unit Name	Add Unit	Apps Mapped to Unit
ts		Zolan International Entity : Super Admin	0	Gridlex Sky Expense Mangement, Gridlex Sky Accounting, Gridlex Zip CRM, Gridlex Zip Delpdesk, Gridlex Zip Contract Management,
		Zolan International Entity : Zolan Ray	0	Gridlex Ray HRMS,
ux	2	Zolan International Entity : Zip Helpdesk Demo	0	Gridlex Zip CRM, Gridlex Zip Helpdesk, Gridlex Zip Contract Management,
		Zolan International Entity : Tejaswini Add	Ø	Gridlex Zip CRM, Gridlex Zip Helpdesk, Gridlex Zip Contract Management,

Step 5: Congratulations! You have successfully added a new user to the Gridlex System. The user will now have access to the specified applications and units based on the permissions and Super Admin status assigned during the process.

How to Delete a User?

Navigate to the "Users" tab in the dashboard. Locate the user you want to remove and click on the "Make Inactive" button next to their name. Once a user is made inactive, they will no longer have access to the system.

Note: Deleted users cannot be retrieved, so exercise caution when using this option. Even though we can activate the users from our end, all the configurations associated with the users cannot be recovered. If you need further assistance or support, reach out to apps@gridlex.com or raise a ticket <u>here</u>.

GRIDLEX	Inbox ~	Zip Helpdesk 🗸 🛛 Zip	CRM ~ Sky Acc	counting & ERP ~ Sky	Expen	ises 🗸 🛛 Ray HRMS 🗸	Objeo	sts Settings ~	My Ao	count ~	Z	Colan	
Enterprise Admin	Lieore	Add User											
Organizations	03013	Add Oser											
	Show 100	0 • entries								Search	rut	b	~
💡 Items	511010	entries								Search.	Tut		^
Users	No ↑↓	Full Name		Username		Email Address		Mapped Units		Reset password		Make User Inactive	
Units	19	Ruth Parker		ruth.p@zolan.com		ruth.p@zolan.com		Tejaswini.		Reset password		Make Inactive	
Pricing												_	
Project	Showing 1	1 to 1 of 1 entries (filtere	ed from 22 total e	ntries)								Previous 1 Ne	ext
Custom UX													
🔹 Settings													

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.