

For those who want to manage their contracts more efficiently in Gridlex Zip, this guide provides a clear set of steps to either hide or delete them as needed.

Step 1: Log in to your Gridlex App Suite account and click on the "Contracts" option under the Zip tab.



Step 2: Once you are on the contracts page, locate the three dots icon on each column. Clicking on this will reveal a dropdown.

Note: The "Action" column is enabled by default. To locate the Hide and Delete options, you'll need to scroll towards the extreme right of the page.

For more in-depth guidance, read this guide on [how to utilize the listing page to view data](#).

GRIDLEX Inbox ▾ Zip Helpdesk ▾ Zip CRM ▾ Sky Accounting & ERP ▾ Sky Expenses ▾ Ray HRMS ▾ Objects Settings ▾ My Account ▾ **Zolan**
Zolan interna... ▾

Contracts Create New Contract Contract Settings

Saved Views ▾ Save View Clear Filters Export to Excel

Contract ID	Contract Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Template Name	Contract Due
118902806680372...	Distribution Agreement					
118902533597628...	Quality Control Contracts					
11890214139161559...	Drug Testing Contract					

1 Page 1 of 1

Sort Ascending
Sort Descending

Columns

Search for Columns Clear Search

CONTRACT NATIVE FIELDS

☒ Contract ID

☒ Contract Name

☒ Contract Template Name

☐ Sub-Contract Name

☒ Contract Start Date

Reset Apply

Filter

Set Column Position

Zip CRM

- Opportunities >
- Activities >
- Organizations >
- Contacts >
- Schedule >
- Campaigns >

Contracts >

Zip Helpdesk

- Dashboard
- Tickets
- Sites

Step 3: In the dropdown, search for the “Action” option. Click “Apply” to add the Action column to your view.

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1 Page 1 of 1 1 – 3 of 3 items

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Step 4: Look towards the extreme right side of your screen. You'll find a newly added column labeled “Action”. In this column, you'll see two options: “Hide” and “Delete”.

Click on the desired action for the specific contract you wish to manage:

- **Hide:** This will remove the contract from the default view but won't delete it.
To view contracts that you've hidden, look for the "saved views" option at the top of the page. From the dropdown menu, select "hidden contracts" to see all contracts that have been set to hidden.
- **Delete:** This will permanently remove the contract. Please be sure before deleting.
It's vital to act with caution when choosing to delete contracts. Once a contract has been deleted, it cannot be restored or retrieved.

The screenshot displays the Gridlex CRM interface. On the left is a dark blue sidebar with a search bar and various navigation icons. The main area is titled 'Contracts' and includes tabs for 'Create New Contract' and 'Contract Settings'. Below these are buttons for 'Saved Views', 'Save View', 'Clear Filters', and 'Export to Excel'. A table lists three contracts, all with an 'Active' status. Each row has 'Hide' and 'Delete' buttons in the 'Action' column. The first row's description is truncated with a 'Read Less' link. The bottom of the interface shows 'Page 1 of 1' and '1 - 3 of 3 items'.

Contract Description	Contract Updated At	Status	Action
It provides a clear and comprehensive description of the items being purchased, the price, payment terms, delivery details, warranties, and other important terms related to the sale Read Less	Aug 24 2023, 6:59 AM	Active	Hide Delete
	Aug 23 2023, 8:07 AM	Active	Hide Delete
	Aug 23 2023, 8:02 AM	Active	Hide Delete

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.