

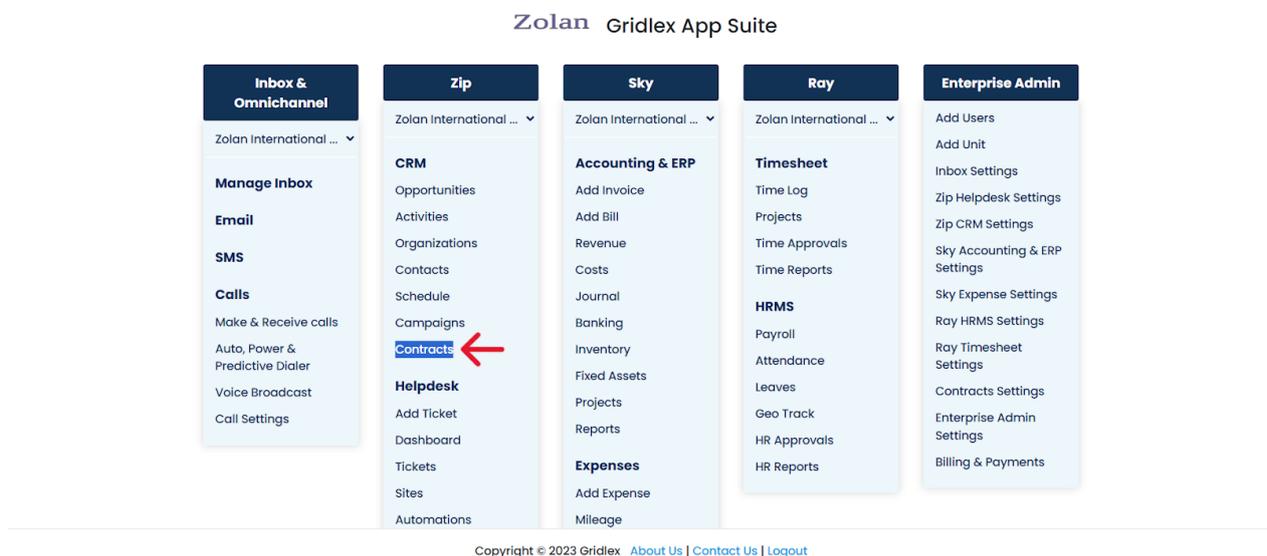
Welcome to our comprehensive guide on utilizing the listing view in Gridlex.

The contract listing view is designed to streamline these tasks, offering an intuitive interface and powerful features that adapt to your unique needs.

This tutorial will walk you through the following:

- The "Columns" feature
- The "Filter" feature
- The "Set Column Position" feature
- The "Export to Excel" feature
- Additional features

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



Step 2: Click on the three-dot menu to reveal the column settings.

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 Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	C
118902806680372...	Distribution Agreement	General Contract Template		Jan 01,2023			U
118902533597628...	Quality Control Contracts	General Contract Template	Apr 01,2023				
11890214139161559...	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 861 Days	Z

Page 1 of 1 1 - 3 of 3 items

Step 3: You can see multiple options here, starting with sorting the contracts in ascending or descending order; this will sort the listing view based on the column of your choice.

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Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	C
11890214139161559...	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 861 Days	Z
118902533597628...	Quality Control Contracts	General Contract Template	Apr 01,2023				

Page 1 of 1 1 - 3 of 3 items

Features:

How to use the 'Columns' option?

Under the 'Columns' option, you can check the desired columns that you want to be displayed and click 'Apply.'

You can reset the displayed columns to default by clicking 'Reset.'

The screenshot shows the Gridlex interface with the 'Columns' configuration menu open. The menu is titled 'Columns' and contains a search bar, a 'Clear Search' button, and a list of columns with checkboxes. The columns are: Contract ID (checked), Contract Name (checked), Contract Template Name (checked), Sub-Contract Name (unchecked), Contract Start Date (checked), and Contract Signature and Execution Date (checked). There are 'Reset' and 'Apply' buttons at the bottom of the menu. The background shows a table with columns for Contract ID, Contract Name, Contract Template Name, Contract Start Date, Contract Signature and Execution Date, Contract End Date, Contract Due, and Counterparty. The table has 3 items.

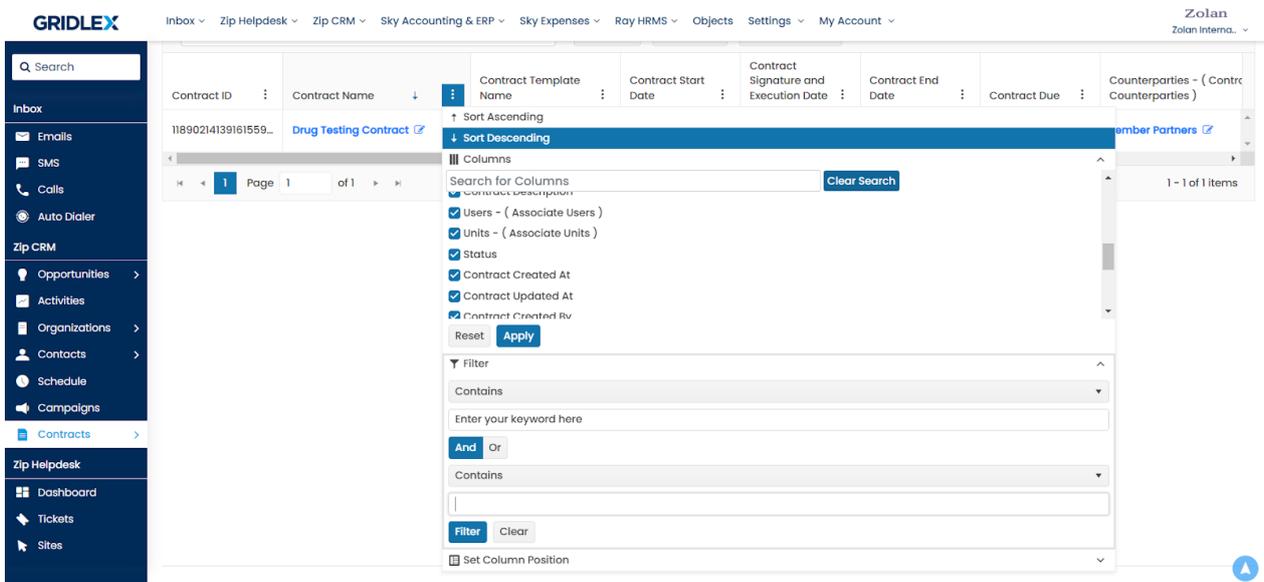
Note: You can drag and drop a column to change its position.

The screenshot shows the Gridlex interface with the 'Contracts' table. The table has columns for Contract ID, Contract Name, Contract Template Name, Contract Start Date, Contract Signature and Execution Date, Contract End Date, Contract Due, and Counterparty. The table has 3 items. The first item is 'Quality Control Contracts' with a 'General Contract Template' link. The second item is 'Drug Testing Contract' with a 'General Contract Template' link. The third item is 'Distribution Agreement' with a 'General Contract Template' link. The table has a 'Page 1 of 1' indicator and a '1 - 3 of 3 items' indicator.

How to use the 'Filter' option?

This option lets you filter your listing view based on keywords of your choice. Enter the keywords, select the desired criteria from the dropdown menu, and click 'Filter.'

You can clear any filter you have applied by clicking 'Clear.'



The screenshot displays the GRIDLEX CRM interface. At the top, there is a navigation bar with the GRIDLEX logo and various menu items: Inbox, Zip Helpdesk, Zip CRM, Sky Accounting & ERP, Sky Expenses, Ray HRMS, Objects, Settings, and My Account. The user's name, Zolan Zolan Internat., is visible in the top right corner. The main content area shows a table of contracts. The first row is highlighted, showing a contract ID of 11890214139161559... and a contract name of 'Drug Testing Contract'. A dropdown menu is open over the table, showing sorting options (Sort Ascending and Sort Descending) and a list of columns to filter by, including Contract Description, Users - (Associate Users), Units - (Associate Units), Status, Contract Created At, Contract Updated At, and Contract Created By. The 'Filter' section is currently empty, with a 'Contains' dropdown and an input field for keywords. The 'Filter' button is visible at the bottom of the dropdown menu.

Note: You can also clear all filters by clicking 'Clear Filters' on the listing view screen.

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Contracts Create New Contract Contract Settings

Saved Views Save View Clear Filters Export to Excel

Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	Counterparty
1189025335976280065	Quality Control Contracts	General Contract Template	Apr 01,2023				
1189021413916155905	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 860 Days	Zember P...
1189028066603728385	Distribution Agreement	General Contract Template		Jan 01,2023			United Re...

Page 1 of 1 1 - 3 of 3 items

How to use the 'Set Column Position' option?

You can click 'Stick Column' to pin one or more columns of your choice, always to be displayed regardless of scrolling.

You can click 'Unstick Column' to release the pinned columns.

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Contracts Create New Contract Contract Settings

Saved Views Save View Clear Filters Export to Excel

Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	Counterparty
1189028066603728385	Distribution Agreement						nited Re...
1189025335976280065	Quality Control Contracts	General Contract Template	Apr 01,2023				
1189021413916155905	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 860 Days	Zember P...

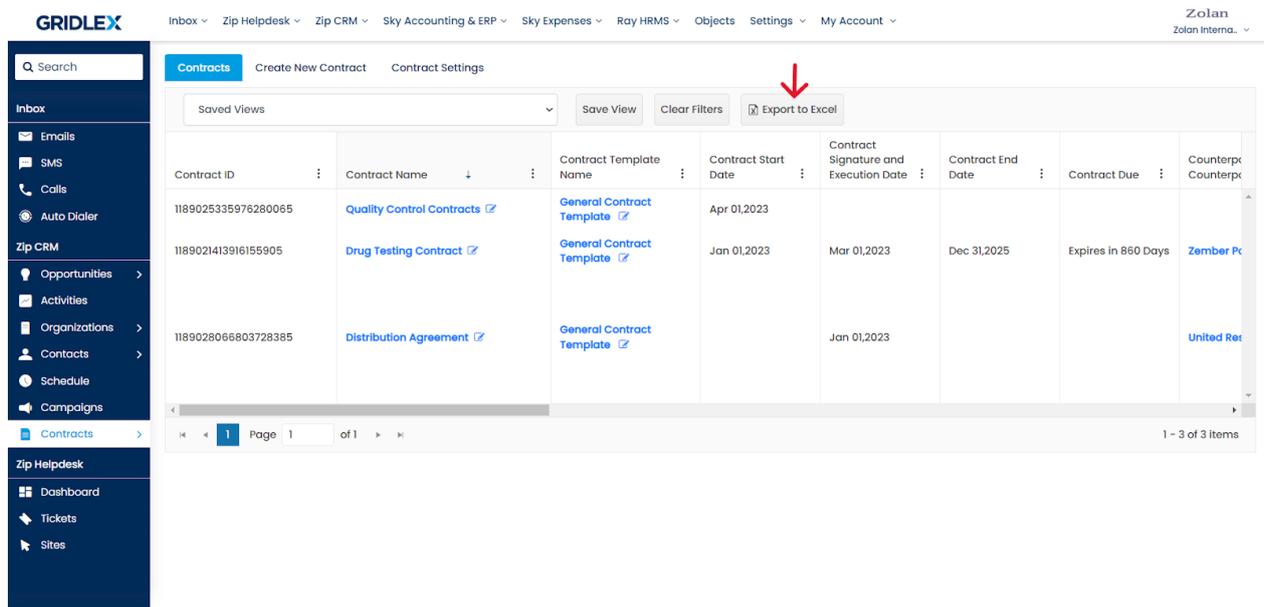
Sort Ascending
Sort Descending
Columns
Filter
Set Column Position
Stick Column
Unstick Column

Page 1 of 1 1 - 3 of 3 items

How to use the “Export to Excel” feature?

Click ‘Export to Excel’ to export the listing view to a spreadsheet. The spreadsheet will be downloaded to your computer.

The exported spreadsheet will reflect the selected filters, columns you have chosen, and column positions.



The screenshot displays the Gridlex CRM interface. The top navigation bar includes the Gridlex logo and various menu items like 'Inbox', 'Zip Helpdesk', 'Zip CRM', 'Sky Accounting & ERP', 'Sky Expenses', 'Ray HRMS', 'Objects', 'Settings', and 'My Account'. The user's name 'Zolan Zolan Intern...' is visible in the top right. The main content area is titled 'Contracts' and features a table with columns for Contract ID, Contract Name, Contract Template Name, Contract Start Date, Contract Signature and Execution Date, Contract End Date, Contract Due, and Counterparty. A red arrow points to the 'Export to Excel' button located above the table. The table contains three rows of contract data.

Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	Counterparty
1189025335976280065	Quality Control Contracts	General Contract Template	Apr 01,2023				
1189021413916155905	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 860 Days	Zember P...
1189028066803728385	Distribution Agreement	General Contract Template		Jan 01,2023			United Res...

Additional Features in the Listing View:

You can click and drag a column's border to resize it to your desired width.

The screenshot shows the Gridlex interface with a sidebar on the left containing navigation options like 'Inbox', 'Emails', 'SMS', 'Calls', 'Auto Dialer', 'Zip CRM', 'Opportunities', 'Activities', 'Organizations', 'Contacts', 'Schedule', and 'Campaigns'. The main content area is titled 'Contracts' and includes a search bar, 'Save View', 'Clear Filters', and 'Export to Excel' buttons. Below these is a table with columns: Contract ID, Contract Name, Contract Template Name, Contract Start Date, Contract Signature and Execution Date, Contract End Date, Contract Due, and Counterparty. Three rows of contract data are visible. A red circle highlights the '+|>' icon in the 'Action' column of the first row.

To save the selected view just for yourself, choose the 'Keep Private' option and then click 'Save.' If you want the saved view to be visible to others, pick your preferred visibility option from the checklist.

Note: Please refer to this guide for more information on saved views: [How to Create a Saved View in Contract Listing in Gridlex Zip?](#)

This screenshot shows the same Gridlex interface as above, but with a 'Save view' modal window open over the table. The modal has a 'Name' input field and three radio button options: 'Share With Zolan International Entity (Live) Entity' (with a 'Set as Default' checkbox), 'Share with specific Units only', and 'Keep Private - Just for me' (with a 'Set as Default' checkbox). A red arrow points to the 'Keep Private' option. 'Cancel' and 'Save' buttons are at the bottom of the modal.

Note: The 'Hide' option in the 'Action' column is similar to 'Delete.' However, you can retrieve hidden contracts by contacting app@gridlex.com.

Congratulations! You have now learned how to utilize the contract listing view in Gridlex.

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.