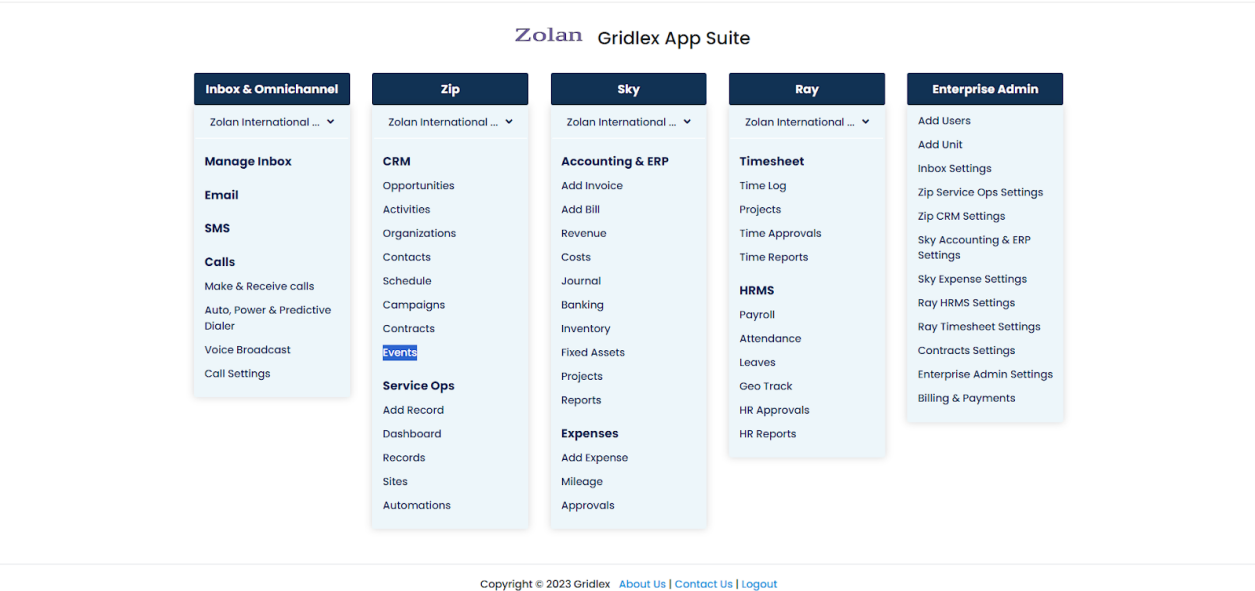


Welcome to our comprehensive guide on updating Event Contacts in Gridlex Zip.

Whether you're organizing meetings, webinars, or other gatherings, Gridlex Zip is designed to make your event management smoother and more systematic. Keeping track of contacts at events is a crucial part of it.

This tutorial will walk you through updating Event contacts in Gridlex Zip.

**Step 1:** Log in to the Gridlex App Suite and click ‘Events’ under the Zip section.



**Step 2:** Click on the Event in which you want to update contacts.

**GRIDLEX** Inbox ▾ Zip Service Ops ▾ Zip CRM ▾ Sky Accounting & ERP ▾ Sky Expenses ▾ Ray HRMS ▾ Objects ▾ Settings ▾ My Account ▾ Zolan  
Zolan Intern...

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**Zip CRM**

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- Activities
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**Zip Service Ops**

- Dashboard
- Records
- Sites

**Events** Settings

Export to Excel Create New Event

Event ID	Event Title	Event Template	Actions	Event Timezone	Event Starts At
1206506745674870785	<a href="#">Health First</a> ←	Basic Event Template	<a href="#">Copy Event</a>	(GMT-05:00) Eastern Time - New York	Nov 01 2023, 9:00
1206743665407447041	<a href="#">Pharma Expo</a>	Basic Event Template	<a href="#">Copy Event</a>	(GMT+05:30) India Standard Time - Kolkata	Oct 11 2023, 1:07
1206803569325387777	<a href="#">Health First 2024</a>	Basic Event Template	<a href="#">Copy Event</a>	(GMT-05:00) Eastern Time - New York	Jan 03 2024, 9:00

Page 1 of 1 1 - 3 of 3 items

### Step 3: Click “Event Contacts.”

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- SMS
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**Zip CRM**

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- Activities
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- Contacts >
- Schedule
- Campaigns
- Contracts >
- Events**

**Zip Service Ops**

- Dashboard
- Records

Events / Health First / Edit Event Details

**Event Details** Event Contacts ←

**Event**

Event Template  
[Basic Event Template](#)

**Event Information**

Event Title \*  Event Format \*

Event Description \*

Health First is a premier gathering that brings together leading professionals, researchers, and thought leaders from the BioPharma industry. This event aims to foster discussions, share insights, and pave the way for innovative solutions that prioritize health. Attendees will have the opportunity to engage in interactive sessions, panel discussions, and networking opportunities, all while exploring the latest advancements and breakthroughs in

Event Timezone \*  Event Starts At \*   Event Ends At \*

## How to Update Event Contacts from the Event Contacts Listing Page?

On the Event Contacts listing page, you can update a contact’s Invitee and Attendee status.

**Step 4:** Change the Invitee and Attendee status per your requirement and click “Save.”

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Events / Health First / Contacts List

Event Details

Event Contacts

Manage Event Contacts

Manage Event Contact Fields

Add Event Contacts Manually

Upload Event Contacts

Export to Excel

Save

Contact Id	Atten...	Invitee	Prefix	First Name	Last Name	Title	Designation
1206770528775319553	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Abigail	White		Sales Representative
1206772196015362049	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Brandon	Brown		Sales Representative
1206772661906059265	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Mark	Hamill		Overseer
1206785800169062400	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mr.	David	Johnson	Manager	Marketing Manager
1206785800131313664	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mr.	John	Doe	Manager	Project Manager
1206785800143896576	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Ms.	Jane	Smith	Director	Lead Analyst
1206785800156479488	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Dr.	Michael	Brown	Professor	Head of Department

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## How to Edit an Event Contact Manually?

**Step 5:** To edit a contact's information, click on the corresponding "Contact ID."

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Add Event Contacts Manually

Upload Event Contacts

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Save

Contact Id	Atten...	Invitee	Prefix	First Name	Last Name	Title	Designation
1206770528775319553	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Abigail	White		Sales Representative
1206772196015362049	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Brandon	Brown		Sales Representative
1206772661906059265	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Mark	Hamill		Overseer
1206785800169062400	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mr.	David	Johnson	Manager	Marketing Manager
1206785800131313664	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mr.	John	Doe	Manager	Project Manager
1206785800143896576	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Ms.	Jane	Smith	Director	Lead Analyst
1206785800156479488	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Dr.	Michael	Brown	Professor	Head of Department

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**Step 6:** Make the desired changes on the contact information page and click "Save."

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Events / Health First / Edit Event Details

Event Details **Event Contacts**

[Manage Event Contacts](#) | Manage Event Contact Fields

**Basic Information**

Prefix  First Name  Last Name

Title  Designation  Email  Phone Number

Organization  Company  Select Contact Type ☒ Invitee ☒ Attendee

## How to Update Event Contacts Manually?

While updating Event contacts, you also have the option to add new contacts to the Event as well. See the following steps:

### Step 7: Click “Add Event Contacts Manually.”

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Zolan International Entity (Live)

Events / Health First / Contacts List

Event Details **Event Contacts**

[Manage Event Contacts](#) | Manage Event Contact Fields

Contact Id	Atten...	Invitee	Prefix	Suffix	First Name	Middle Name	Last Name
No records available.							

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No items to display

### Step 8: Enter the contact information in the fields. Click ‘Save’ once done.

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Events / Health First / Contact Create

Event Details
Event Contacts

[Manage Event Contacts](#) | [Manage Event Contact Fields](#)

Basic Information

Prefix
Enter Prefix

First Name \*
Joseph

Last Name \*
Pritchett

Title
Enter Title

Designation
CEO

Email \*
joepritchett@pharmafactor.com

Phone Number
Enter Number

Organization
Pharma Factor

Company
Pharma Factor

Select Contact Type
☒ Invitee
☐ Attendee

Cancel

Save

You'll see that the contact has been added to the Event.

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Events / Health First / Contacts List

Event Details
Event Contacts

[Manage Event Contacts](#) | [Manage Event Contact Fields](#)

Export to Excel

Save

Contact Id

Atten...

Invitee

Prefix

First Name

Last Name

Title

Designation

1206770528775319553

☒

☒

Abigail

White

Sales Representative

1206772196015362049

☐

☒

Brandon

Brown

Sales Representative

1206772661906059265

☐

☒

Mark

Hamill

Overseer

1206785800169062400

☐

☒

Mr.

David

Johnson

Manager

Marketing Manager

1206785800131313664

☐

☒

Mr.

John

Doe

Manager

Project Manager

1206785800143896576

☐

☒

Ms.

Jane

Smith

Director

Lead Analyst

1206785800156479488

☐

☒

Dr.

Michael

Brown

Professor

Head of Department

1207163186798669825

☐

☒

Joseph

Pritchett

CEO

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**Step 9:** Once you are done adding the contacts. Click "Save."

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Upload Event Contacts

Export to Excel

Save

Contact Id	Atten...	Invitee	Prefix	First Name	Last Name	Title	Designation
1206770528775319553	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Abigail	White		Sales Representative
1206772196015362049	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Brandon	Brown		Sales Representative
1206772661906059265	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Mark	Hamill		Overseer
1206785800169062400	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mr.	David	Johnson	Manager	Marketing Manager
1206785800131313664	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mr.	John	Doe	Manager	Project Manager
1206785800143896576	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Ms.	Jane	Smith	Director	Lead Analyst
1206785800156479488	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Dr.	Michael	Brown	Professor	Head of Department
1207163186798669825	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Joseph	Pritchett		CEO

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## How to Update Event Contacts Through File Upload?

You can add new contacts to the Event while updating Event contacts through file upload as well. See the following steps:

### Step 10: Click "Upload Event Contacts."

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Contact Id	Atten...	Invitee	Prefix	First Name	Last Name	Title	Designation
1206770528775319553	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Abigail	White		Sales Representative
1206772196015362049	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Brandon	Brown		Sales Representative
1206772661906059265	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Mark	Hamill		Overseer
1206785800169062400	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mr.	David	Johnson	Manager	Marketing Manager
1206785800131313664	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mr.	John	Doe	Manager	Project Manager
1206785800143896576	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Ms.	Jane	Smith	Director	Lead Analyst
1206785800156479488	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Dr.	Michael	Brown	Professor	Head of Department
1207163186798669825	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Joseph	Pritchett		CEO

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**Step 11:** On this page, you can upload a CSV, XLX, or XLXS file. Once you have selected a file from your system, click the "Upload" button to initiate

the import process. Before proceeding, you can download the sample file to understand the format supported by the system.

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Events / Health First / Contacts Upload

Event Details | **Event Contacts**

Manage Event Contacts

Manage Event Contact Fields

Contact Upload

(Download sample file)

Upload File

Choose file | No file chosen

Upload

Note: Maximum file size: 2 MB for CSV, XLS, XLSX

No.	Time Stamp of Upload	Review File	Create Event Contacts	Review Logs	Download Logs
1	Oct. 12, 2023, 5:57 a.m.	Event Contacts.xlsx	Already Created	<ul style="list-style-type: none"> <li>Contacts Created: 0</li> <li>Contacts Updated: 4</li> <li>Contacts Failed: 0</li> </ul>	
2	Oct. 12, 2023, 5:49 a.m.	Event Contacts.xlsx	Already Created	<ul style="list-style-type: none"> <li>Contacts Created: 0</li> <li>Contacts Updated: 4</li> <li>Contacts Failed: 0</li> </ul>	
3	Oct. 11, 2023, 8:20 a.m.	Event Contacts.xlsx	Already Created	<ul style="list-style-type: none"> <li>Contacts Created: 4</li> <li>Contacts Updated: 0</li> <li>Contacts Failed: 0</li> </ul>	
4	Oct. 11, 2023, 8:15 a.m.	Event Contacts.xlsx	Headers not matched		

**Step 12:** Once you have downloaded the sample file, review its format to ensure your data aligns with the system's requirements. If the data file doesn't align with the system's requirement, For example, here you can view the data:

	A	B	C	D	E	F	G	H	I	J
2		yes	Mr.	John	Doe	Manager	Project Manager	john.doe2@example.com	555-123-4567	Male
3		yes	Ms.	Jane	Smith	Director	Lead Analyst	jane.smith2@example.com	555-987-6543	Female
4		yes	Dr.	Michael	Brown	Professor	Head of Department	michael.brown@example.com	555-555-5555	Male
5		yes	Mr.	David	Johnson	Manager	Marketing Manager	david.johnson@example.com	555-222-3333	Male
6		yes	Mr.	Jessica	Hartfield	Manager	Project Manager	jessica.h@example.com	555-123-4567	Female
7		yes	Ms.	Brandon	Lamont	Director	Lead Analyst	brandon.l@example.com	555-987-6543	Male
8		yes	Dr.	Alexis	Whitmore	Professor	Head of Department	alexis.w@example.com	555-555-5555	Female
9		yes	Mr.	Mitchell	Standish	Manager	Marketing Manager	mitchel.s@example.com	555-222-3333	Male
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
20										
21										
22										
23										
24										

After a successful upload, you will receive a notification confirming the completion to your registered email address. If you're on the same page, hit refresh, and you'll see the status of your upload. See below.

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Manage Event Contact Fields

Contact Upload

(Download sample file)

Upload File

Choose file

No file chosen

Upload

Note: Maximum file size: 2 MB for CSV, XLS, XLSX

No.	Time Stamp of Upload	Review File	Create Event Contacts	Review Logs	Download Logs
1	Oct. 12, 2023, 9:33 a.m.	Event Contacts.xlsx	Already Created	<ul style="list-style-type: none"> <li>Contacts Created: 6</li> <li>Contacts Updated: 2</li> <li>Contacts Failed: 0</li> </ul>	
2	Oct. 12, 2023, 5:57 a.m.	Event Contacts.xlsx	Already Created	<ul style="list-style-type: none"> <li>Contacts Created: 0</li> <li>Contacts Updated: 4</li> <li>Contacts Failed: 0</li> </ul>	
3	Oct. 12, 2023, 5:49 a.m.	Event Contacts.xlsx	Already Created	<ul style="list-style-type: none"> <li>Contacts Created: 0</li> <li>Contacts Updated: 4</li> <li>Contacts Failed: 0</li> </ul>	
4	Oct. 11, 2023, 8:20 a.m.	Event Contacts.xlsx	Already Created	<ul style="list-style-type: none"> <li>Contacts Created: 4</li> <li>Contacts Updated: 0</li> <li>Contacts Failed: 0</li> </ul>	

You can download the logs and review the information if there are any failed contact uploads. Click the download button under the “Download Logs” column to save the logs to your system.

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Contact Upload

(Download sample file)

Upload File

Choose file

No file chosen

Upload

Note: Maximum file size: 2 MB for CSV, XLS, XLSX

No.	Time Stamp of Upload	Review File	Create Event Contacts	Review Logs	Download Logs
1	Oct. 12, 2023, 9:33 a.m.	Event Contacts.xlsx	Already Created	<ul style="list-style-type: none"> <li>Contacts Created: 6</li> <li>Contacts Updated: 2</li> <li>Contacts Failed: 0</li> </ul>	
2	Oct. 12, 2023, 5:57 a.m.	Event Contacts.xlsx	Already Created	<ul style="list-style-type: none"> <li>Contacts Created: 0</li> <li>Contacts Updated: 4</li> <li>Contacts Failed: 0</li> </ul>	
3	Oct. 12, 2023, 5:49 a.m.	Event Contacts.xlsx	Already Created	<ul style="list-style-type: none"> <li>Contacts Created: 0</li> <li>Contacts Updated: 4</li> <li>Contacts Failed: 0</li> </ul>	
4	Oct. 11, 2023, 8:20 a.m.	Event Contacts.xlsx	Already Created	<ul style="list-style-type: none"> <li>Contacts Created: 4</li> <li>Contacts Updated: 0</li> <li>Contacts Failed: 0</li> </ul>	

You can go to the “[Manage Event Contacts](#)” page to see the Event Contacts you have updated or added.

Congratulations! You have now learned how to update Event 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](mailto: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.