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.

Inbox & Omnichannel	Zip	Sky	Ray	Enterprise Admin
Zolan International 💙 Manage Inbox	Zolan International V	Zolan International V	Zolan International Y	Add Users Add Unit Inbox Settings
Email SMS Calls Make & Receive calls Auto, Power & Predictive Dialer Voice Broadcast Call Settings	Opportunities Activities Organizations Contacts Schedule Campaigns Contracts Evente Service Ops Add Record Dashboard	Add Invoice Add Bill Revenue Costs Journal Banking Inventory Fixed Assets Projects Reports Expenses	Time Log Projects Time Approvals Time Reports HRMS Payroll Attendance Leaves Geo Track HR Approvals HR Reports	Illos seuringa Zip Exervice Ops Settings Zip CRM Settings Sky Accounting & ERP Settings Sky Expense Settings Ray HRMS Settings Ray Timesheet Settings Contracts Settings Enterprise Admin Settings Billing & Payments
	Records Sites Automations	Add Expense Mileage Approvals		

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 ~ M	ly Account 🗸		Zolan Zolan Interna v
<b>Q</b> Search	Events Settings					
Inbox	X Export to Excel					Create New Event
🖂 Emails	Event ID	Event Title	Event Template	Actions :	Event Timezone	Event Starts At
💴 SMS	Event ID :	Event litie :	Event l'emplate :	Actions :		Event Starts At
📞 Calls	1206506745674870785	Health First	Basic Event Template	Copy Event	(GMT-05:00) Eastern Time - New York	Nov 01 2023, 9:(
Auto Dialer	1206743665407447041	Pharma Expo	Basic Event Template	Copy Event	(GMT+05:30) India Standard Time - Kolkata	Oct 11 2023, 1:07
Zip CRM					(GMT-05:00) Eastern Time -	
Opportunities >	1206803569325387777	Health First 2024	Basic Event Template	Copy Event	New York	Jan 03 2024, 9:
Z Activities	•					÷.
Organizations >	H H Page 1	of1 > H				1 - 3 of 3 items
Contacts >						
🕔 Schedule						
Campaigns						
Contracts						
Events						
Zip Service Ops						
Dashboard						
🔷 Records						
🔭 Sites						

Step 3: Click "Event Contacts."

GRIDLEX	Inbox - Zip Service Ops - Zip CRM - Sky Accounting & ERP - Sky Expenses - Ray HRMS - Objects Settings - My Account -	Zolan Zolan International Entity (Live)
<b>Q</b> Search	Events / Health First / Edit Event Details	
Inbox	Event Details Event Contacts	
🖂 Emails		
💴 SMS	Event	^
📞 Calls	Event Template	
Auto Dialer	Basic Event Template &	
Zip CRM		
Opportunities >	Event Information	^
Activities	Event Title * Event Format *	
Organizations >	Health First In-Person	~
Contacts >		
🕓 Schedule	Event Description *	
Campaigns	Health First is a premier gathering that brings together leading professionals, researchers, and thought leaders from the BioPharm	
Contracts >	discussions, share insights, and pave the way for innovative solutions that prioritize health. Attendees will have the opportunity to e discussions, and networking opportunities, all while exploring the latest advancements and breakthroughs in	
Z Events		10
Zip Service Ops	Event Storts At * Event Storts At * Event Storts At *	
	(GMT-05:00) Eastern Time - New York • 01-11-2023	17:00 🛇
Records		

## 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."

GRIDLEX	Inbox × Zip Service Ops ×	Zip CRM ~	Sky Accounting	& ERP ~ Sky Expenses ~	Ray HRMS ~ Objects	Settings ~ My Account ~		Zolan Zolan International Entity (Live
<b>Q</b> Search	Events / Health First / o	Contacts List						
Inbox	Event Details Event C	ontacts						
🗠 Emails	Manage Event Contacts	Manage Eve	ent Contact Fie	lds				
SMS		5					Add Event Contacts Manua	lly Upload Event Contacts
📞 Calls								
Auto Dialer	Export to Excel							Save
Zip CRM	Contact Id	Atten	Invitee	Prefix :	First Name	Last Name	Title :	Designation :
Opportunities >	1206770528775319553				Abigail	White		Sales Representative
🧹 Activities	1206772196015362049				Brandon	Brown		Sales Representative
Organizations >	1206772661906059265				Mark	Hamill		Overseer
💄 Contacts 💦 🗲	1206785800169062400			Mr.	David	Johnson	Manager	Marketing Manager
🕔 Schedule	1206785800131313664			Mr.	John	Doe	Manager	Project Manager
┥ Campaigns	1206785800143896576			Ms.	Jane	Smith	Director	Lead Analyst
Contracts		-						
Events	1206785800156479488		~	Dr.	Michael	Brown	Professor	Head of Department
Zip Service Ops	•							•
- Dashboard	a a 1 Page 1	of1 ⊧	H					1 - 7 of 7 items
Records								
No Sites								

## How to Edit an Event Contact Manually?

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

GRIDLEX	Inbox ~ Zip Service Ops ~	Zip CRM ~	Sky Accounting	J & ERP ∽ Sky Expenses ∽	Ray HRMS ~ Objects	Settings ~ M	y Account 🗸		Zolan International Ent	olan ity (Live)			
Q Search	Events / Health First / C	Contacts List											
Inbox	Event Details Event Co	Event Details Event Contacts											
🖂 Emails	Manage Event Contacts	Manage Eve	ent Contact Fie	lds									
SMS		0						Add Event Contacts Manua	Ily Upload Event Cont	tacts			
📞 Calls													
Auto Dialer	Export to Excel								so	ave			
Zip CRM	Contact Id	Atten	Invitee :	Prefix :	First Name	: Last Name	:	Title :	Designation	1			
Opportunities >	1206770528775319553				Abigail	White			Sales Representative	*			
- Activities	1206772196015362049				Brandon	Brown			Sales Representative				
Organizations >	1206772661906059265				Mark	Hamill			Overseer				
Contacts >	1206785800169062400			Mr.	David	Johnson		Manager	Marketing Manager				
🕔 Schedule	1206785800131313664		<b>Z</b>	Mr.	John	Doe		Manager	Project Manager				
Campaigns	1206785800143896576			Ms.	Jane	Smith		Director	Lead Analyst				
Contracts	1206785800156479488			Dr.	Michael	Brown		Professor	Head of Department				
Z Events	1200703000130473400		-	ы.	MICHOS	brown		10163301	neud of Department	~			
Zip Service Ops		of1 ⊧							1 - 7 of 7 ite	•			
Dashboard	H H 1 Page 1	OT F	n						1-7017 ite	1110			
🔷 Records													

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

GRIDLEX	Inbox - Zip Service Ops - Zip CRM - Sky Ac	counting & ERP $\checkmark$ Sky Expenses $\checkmark$ Ray HRMS $\checkmark$	Objects Settings ~ My Account ~	Zolan Zolan International Entity (Live)							
<b>Q</b> Search	Events / Health First / Edit Event Details										
Inbox	Event Details Event Contacts										
🖂 Emails	Manage Event Contacts   Manage Event Co	ntact Fields									
SMS											
📞 Calls	Basic Information										
Auto Dialer	Prefix		First Name *	Last Name *							
ZIP CRM	Enter Prefix		Abigail	White							
Opportunities >	Title	Designation	Email *	Phone Number							
Activities		Designation									
Organizations >	Enter Title	Sales Representative	abigail@biopharm.com	5551234657							
Contacts >	Organization	Company	Select Contact Type								
🕔 Schedule	BioPharm	BioPharm	V Invitee V Attendee								
Campaigns											
Contracts >											
🔀 Events											
Zip Service Ops											
			1								
Necords											
Sites		Cancel	Save								

## 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."

GRIDLEX	Inbox × Zip Service Ops × Zip CRM × Sky Accounting & ERP × Sky Expenses × Ray HRMS × Objects Settings × My Account ×	Zolan Zolan International Entity (Live)
Q Search	Events / Health First / Contacts List	
Inbox	Event Details Event Contacts	
🖂 Emails	Manage Event Contacts   Manage Event Contact Fields	
SMS		Upload Event Contacts
📞 Calls		
Auto Dialer	€ Export to Excel	Save
ZIP CRM	Contact Id : Atten: Invitee : Prefix : Suffix : First Name : Middle Name : Last I	Name :
Opportunities >	No records available.	- -
- Activities	to feature unique.	
Organizations >	H 4 0 Page 0 of0 → H	No items to display
Contacts >		no terno to dispidy
🕓 Schedule		
┥ Campaigns		
Contracts		
Events		
Zip Service Ops		
- Dashboard		
🔶 Records		
Sites		

**Step 8:** Enter the contact information in the fields. Click 'Save' once done.

GRIDLEX	Inbox ~ Zip Service Ops ~ Zip CRM ~ Sk	y Accounting & ERP ~ Sky Expenses ~ Ray HRMS ~	Objects Settings ~ My Account ~	Zolan Zolan International Entity (Live)								
Q Search	Events / Health First / Contact Create											
Inbox	Event Details Event Contacts											
🖂 Emails	Manage Event Contacts   Manage Event Contact Fields											
SMS												
📞 Calls	Basic Information											
Auto Dialer	Prefix		First Name *	Last Name *								
Zip CRM	Enter Prefix		Joseph	Pritchett								
Opportunities >			Email *									
- Activities	Title	Designation		Phone Number								
Organizations >	Enter Title	CEO	joepritchett@pharmafactor.com	Enter Number								
Contacts >	Organization	Company	Select Contact Type									
🕔 Schedule	Pharma Factor	Pharma Factor	✓ Invitee ☐ Attendee									
┥ Campaigns												
Contracts												
M Events												
Zip Service Ops												
			1									
Records												
🔭 Sites		Cano	el Save									

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

GRIDLEX	Inbox - Zip Service O	ps ~ Zip CRM ~	Sky Accountin	g & ERP ~ Sky Ex	penses ~	Ray HRMS ~ Ob	ects Se	ettings 👻 My Account 🔨		Zolan International Entit	olan :y (Live)	
Q Search	Events / Health Firs	t / Contacts List										
Inbox	Event Details Ev	ent Contacts										
🖂 Emails	Manage Event Cont	acts   Manage Ev	ent Contact Fi	elds								
📁 SMS		Manage Event Contacts   Manage Event Contact Fields Add Event Contacts Manually Upload Event Contacts										
📞 Calls												
💿 Auto Dialer	Export to Excel									Sav	ve	
Zip CRM	Contact Id	: Atten :	Invitee	Prefix	:	First Name	:	Last Name	: Title	: Designation :		
Opportunities	120677052877531955	53 🔽	•			Abigail		White		Sales Representative	^	
Z Activities	120677219601536204	9				Brandon		Brown		Sales Representative		
Organizations	12067726619060592	55				Mark		Hamill		Overseer		
Contacts >	12067858001690624	00		Mr.		David		Johnson	Manager	Marketing Manager		
🕔 Schedule	120678580013131366	4		Mr.		John		Doe	Manager	Project Manager		
┥ Campaigns	12067858001438965	76		Ms.		Jane		Smith	Director	Lead Analyst		
Contracts	12067858001564794	88		Dr.		Michael		Brown	Professor	Head of Department		
Z Events												
Zip Service Ops		5				Joseph		Pritchett		CEO		
Dashboard	R A 1 Page	l of1 ⊧	Þ							1 - 8 of 8 iten		
Records	in a sign									1 00101101		
Sites												

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

GRIDLEX	Inbox ~ Zip Service Ops ~	Zip CRM ~	Sky Accounting	g & ERP ~ Sky Expenses ~	Ray HRMS ~ Objects S	ettings 🕤 My Account 🗸		Zolan Zolan International Entity (Live
<b>Q</b> Search	Events / Health First /	Contacts List						
Inbox	Event Details Event C	Contacts						
🗠 Emails	Manage Event Contacts	l Manage Eve	ent Contact Fie	alds				
SMS		,					Add Event Contacts Manua	lly Upload Event Contacts
📞 Calls								
Auto Dialer	Export to Excel							
Zip CRM	Contact Id :	Atten	Invitee :	Prefix :	First Name	Last Name :	Title :	Designation :
Opportunities >	1206770528775319553				Abigail	White		Sales Representative
Activities	1206772196015362049				Brandon	Brown		Sales Representative
Organizations >	1206772661906059265				Mark	Hamill		Overseer
Contacts >	1206785800169062400			Mr.	David	Johnson	Manager	Marketing Manager
Schedule	1206785800131313664			Mr.	John	Doe	Manager	Project Manager
┥ Campaigns	1206785800143896576			Ms.	Jane	Smith	Director	Lead Analyst
Contracts				_				
Z Events	1206785800156479488			Dr.	Michael	Brown	Professor	Head of Department
Zip Service Ops	1207163186798669825				Joseph	Pritchett		CEO
Dashboard	•							÷
Necords	H 4 1 Page 1	of1 ⊧	►I					1 - 8 of 8 items
Sites								

## 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."

GRIDLEX	Inbox - Zip Service Ops -	Zip CRM 🗸 🖇	Sky Accountine	g & ERP ~ Sk	y Expenses ~	Ray HRMS ~ Ob	bjects Se	ttings 🗸 My Account 🗸		Z Zolan International Ent	Zolan itity (Live	
Q Search	Events / Health First /	Contacts List										
Inbox	Event Details Event C	contacts										
🗠 Emails	Manage Event Contacts	Manage Event Contacts   Manage Event Contact Fields										
SMS		Add Event Contacts Manually Upload Event Contacts										
📞 Calls												
Auto Dialer	Export to Excel									S	ave	
Zip CRM	Contact Id :	Atten	Invitee :	Prefix	:	First Name	:	Last Name	Title :	Designation	:	
Opportunities >	1206770528775319553	~				Abigail		White		Sales Representative	*	
<ul> <li>Activities</li> </ul>	1206772196015362049					Brandon		Brown		Sales Representative		
Organizations >	1206772661906059265					Mark		Hamill		Overseer		
Contacts >	1206785800169062400			Mr.		David		Johnson	Manager	Marketing Manager		
Schedule	1206785800131313664			Mr.		John		Doe	Manager	Project Manager		
Campaigns	1206785800143896576			Ms.		Jane		Smith	Director	Lead Analyst		
Contracts >	1206785800156479488			Dr.		Michael		Brown	Professor	Head of Department		
ip Service Ops	1207163186798669825					Joseph		Pritchett		CEO	~	
<ul> <li>Dashboard</li> <li>Records</li> </ul>	< н 4 <b>1</b> Раде 1	of1 ►	ы							1 – 8 of 8 ite	• ems	

**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.

GRIDLEX	Inbox ~	Zip Service Ops ~ Zip CRM ~ Sky	Ay Account 🗸	Zolan Zolan International Entity (Live)									
Q Search	Events /	Events / Health First / Contacts Upload											
Inbox	Event	Event Details Event Contacts											
🖂 Emails	cilis Manage Event Contacts   Manage Event Contact Fields												
💴 SMS													
📞 Calls													
Auto Dialer		Upload File Choose file No file chosen Upload											
Zip CRM		Choose file No file chosen Upload											
Opportunities >	No.	Time Stamp of Upload	Review File	Create Event Contacts	Review Logs	Download Logs							
🧭 Activities					, in the second								
Organizations >	,	Oct. 12, 2023, 5:57 a.m.	Event Contacts.xisx	Already Created	Contacts Created: 0     Contacts Updated: 4	*							
Contacts >	· · ·	Oct. 12, 2023, 5:57 d.m.	Event Contacts.xisx	Aireddy Credted	Contacts Failed: 0								
🕔 Schedule													
┥ Campaigns	2	Oct. 12, 2023, 5:49 a.m.	Event Contacts.xlsx	Already Created	Contacts Created: 0     Contacts Updated: 4	*							
Contracts >	Ĩ.	001.12, 2020, 0.40 0.11.	Event contracts.xisx	Alloudy ordered	Contacts Failed: 0	_							
Z Events					Contacts Created: 4								
Zip Service Ops	3	Oct. 11, 2023, 8:20 a.m.	Event Contacts.xlsx	Already Created	Contacts Updated: 0	*							
Dashboard		Contacts Failed: 0											
🔷 Records	4	Oct. 11, 2023, 8:15 a.m.	Event Contacts.xlsx	Headers not matched									
Sites													

**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:

	Α	В	С	D	E	F	G	Н	1	J
2		yes	Mr.	John	Doe	Manager	Project Manager	john.doe2@example.con	555-123-4567	Male
3		yes	Ms.	Jane	Smith	Director	Lead Analyst	jane.smith2@example.co	555-987-6543	Female
4		yes	Dr.	Michael	Brown	Professor	Head of Department	michael.brown@example	555-555-5555	Male
5		yes	Mr.	David	Johnson	Manager	Marketing Manager	david.johnson@example.	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.

GRIDLEX	Inbox ~	Zip Service Ops - Zip CRM - Sky	Accounting & ERP V Sky Expenses V	Ray HRMS - Objects Settings -	My Account v	Zolan Zolan International Entity (Live)
Q Search	Events /	/ Health First / Contacts Upload				
Inbox	Event I	Details Event Contacts				
😁 Emails	Manag	e Event Contacts   Manage Event	Contact Fields			
💴 SMS	Canta	ct Upload (Download sample file)				
📞 Calls						
O Auto Dialer	Upload F		Italaad			
Zip CRM		se file No file chosen	Upload			
Opportunities >	No.	Time Stamp of Upload	Review File	Create Event Contacts	Review Logs	Download Logs
🖂 Activities						
Organizations > Contacts >	1	Oct. 12, 2023, 9:33 a.m.	Event Contacts.xlsx	Already Created	Contacts Created: 6     Contacts Updated: 2     Contacts Failed: 0	±
┥ Campaigns					Contacts Created: 0     Contacts Updated: 4	
Contracts >	2	Oct. 12, 2023, 5:57 a.m.	Event Contacts.xlsx	Already Created	Contacts Failed: 0	*
Z Events						
Zip Service Ops	3	Oct. 12, 2023, 5:49 a.m.	Event Contacts.xlsx	Already Created	Contacts Created: 0     Contacts Updated: 4	*
Dashboard				,	Contacts Failed: 0	
🔷 Records					Contacts Created: 4	
🕞 Sites	4	Oct. 11, 2023, 8:20 a.m.	Event Contacts.xlsx	Already Created	Contacts Updated: 0	<u>*</u> -

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.

Search	Manag	e Event Contacts   Manage Even	It Contact Fields					
	Contac	ct Upload (Download sample fil	e)					
хос								
Emails		Upload File						
SMS		Choose file No file chosen Upload						
Calls	Note: Maxi	imum file size: 2 MB for CSV, XLS, XLSX						
Auto Dialer	No.	Time Stamp of Upload	Review File	Create Event Contacts	Review Logs	Download Logs		
CRM					Contacts Created: 6	7		
Opportunities >	1	Oct. 12, 2023, 9:33 a.m.	Event Contacts.xlsx	Already Created	<ul> <li>Contacts Updated: 2</li> <li>Contacts Failed: 0</li> </ul>	*		
Activities								
Organizations >		Oct. 12, 2023, 5:57 a.m.	Event Contacts.xlsx	Hereit Orreted	<ul> <li>Contacts Created: 0</li> <li>Contacts Updated: 4</li> </ul>	*		
Contacts >	2			Already Created	Contacts Failed: 0			
Schedule								
Campaigns	3	Oct. 12, 2023, 5:49 a.m.	Event Contacts.xisx	Already Created	<ul> <li>Contacts Created: 0</li> <li>Contacts Updated: 4</li> </ul>	*		
Contracts >	3		Event Contacts.xisx	Alleddy credted	Contacts Failed: 0			
Events					Contacts Created: 4			
Service Ops	4	Oct. 11, 2023, 8:20 a.m.	Event Contacts.xlsx	Already Created	Contacts Created: 4     Contacts Updated: 0     Outpate Splits 0	*		
Dashboard								
Records	1							

You can go to the "<u>Manage Event Contacts</u>" 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 <a href="mailto:apps@gridlex.com">apps@gridlex.com</a> 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.