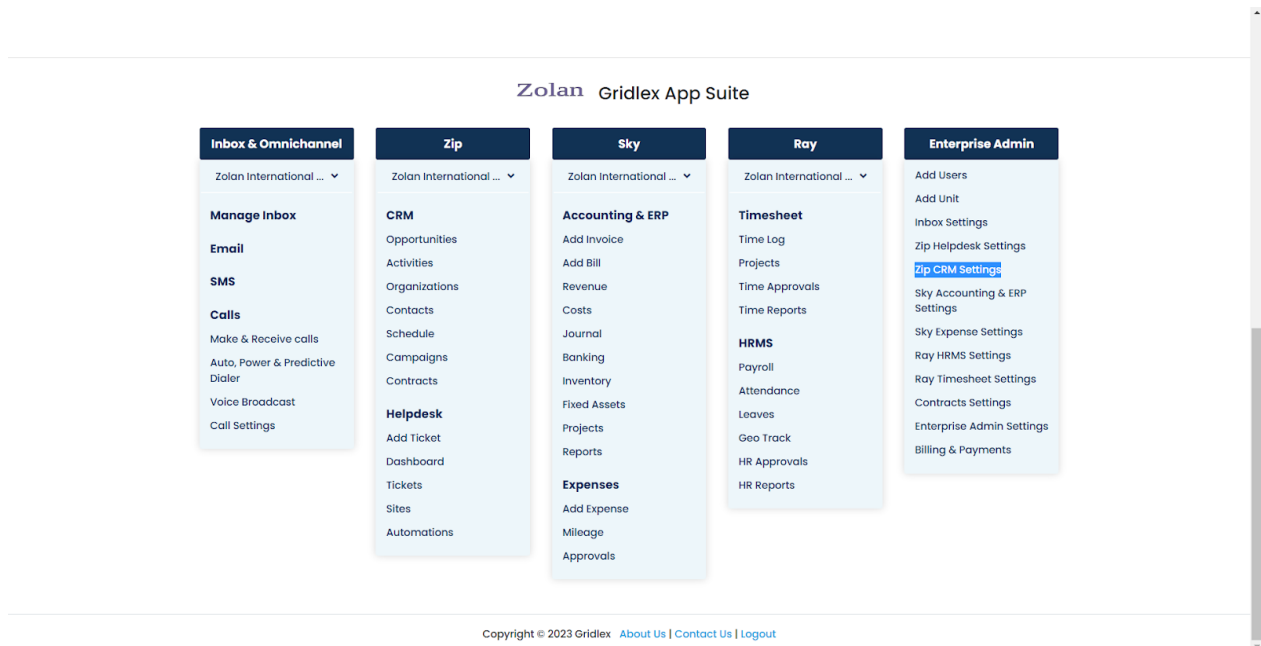
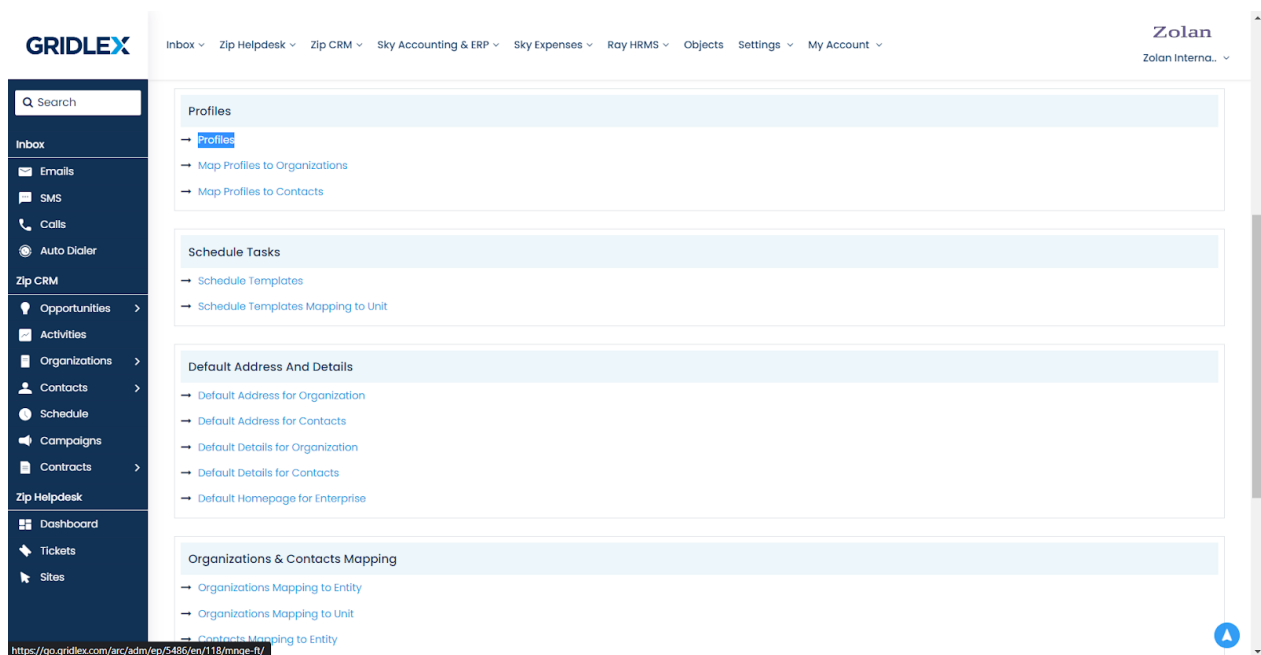


This step-by-step guide will walk you through the process of creating custom profiles with existing custom fields in Gridlex App Suite.

Step 1: Log in to Gridlex App Suite and click on "Zip CRM Settings" located under the Enterprise Admin.



Step 2: Under the "Profiles" section, click on the "Profiles" option.



Step 3: After accessing the "Profiles" section, a new page will appear. On this page, look for the "Create Section" option in the top menu bar and click on it.

The screenshot shows the GRIDLEX CRM interface. On the left is a dark blue sidebar with a search bar and a menu including 'Inbox', 'Emails', 'SMS', 'Calls', 'Auto Dialer', 'Zip CRM' (with sub-items: Opportunities, Activities, Organizations, Contacts, Schedule, Campaigns, Contracts), 'Zip Helpdesk' (with sub-items: Dashboard, Tickets, Sites), and a 'Zolan' logo at the top right. The top navigation bar contains links for 'Inbox', 'Zip Helpdesk', 'Zip CRM', 'Sky Accounting & ERP', 'Sky Expenses', 'Ray HRMS', 'Objects', 'Settings', and 'My Account'. The main content area is titled 'Entity : Zolan International Entity' and has a sub-header 'Create Sections'. Below this, there's a form for 'Section 1' with fields for 'Section Name' and 'Section Description'. The 'Section Description' field has a rich text editor with a toolbar showing options like font size, bold, italic, underline, strikethrough, link, unlink, and list. Below the description field are two sections: 'Standard Fields' with an 'Add Standard Field' button, and 'Custom Fields' with an 'Add Custom Field' button.

Step 4: In the newly created section, find and click on the "Add Custom Field" option. Fill in the required details for your custom field. Once you have configured the custom field to your liking, click on the "Submit" button to save it.

GRIDLEX | Zolan | Zolan Interna..

Inbox ▾ Zip Helpdesk ▾ Zip CRM ▾ Sky Accounting & ERP ▾ Sky Expenses ▾ Ray HRMS ▾ Objects ▾ Settings ▾ My Account ▾

Search

Inbox

- Emails
- SMS
- Calls
- Auto Dialer

Zip CRM

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

Zip Helpdesk

- Dashboard
- Tickets
- Sites

Custom Fields

Field Name	Custom Field order	Required field	Show *
HH/Hospice ▾	1	True ▾	True ▾
Patient Name ▾	2	False ▾	False ▾

Add Custom Field

Custom Objects

Add Custom object Field

Derived Fields

Add Organization Derived Field Add Contact Derived Field Add Item Derived Field

Submit

Add Section

Step 5: After clicking "Submit," your custom field will be added to the list of fields within the section you created. You can review and manage all your custom fields from this page.

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Inbox ▾ Zip Helpdesk ▾ Zip CRM ▾ Sky Accounting & ERP ▾ Sky Expenses ▾ Ray HRMS ▾ Objects ▾ Settings ▾ My Account ▾

Search

Inbox

- Emails
- SMS
- Calls
- Auto Dialer

Zip CRM

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

Zip Helpdesk

- Dashboard
- Tickets
- Sites

Manage Profiles Create Profile **Manage Sections** Create Sections

Section ID	Section Name	Mapped Entity
1176070926044024833	Category Section	Zolan International Entity
1178920522260709377	DEMO	Zolan International Entity
1166286507410223104	Territory Details	Zolan International Entity

Step 6: To utilize the custom field, you need to map it to the appropriate profiles, such as Organizations or Contacts. Navigate to the "Create Profile" section. Select the relevant profile you want to map the custom field to. Allow the profile to access the custom field by selecting it from the available field options. Once you are satisfied with the profile settings, click on the "Submit" button to save the changes.

Note: If you want to use this profile for newly imported or created contacts, please choose "Auto Select this profile while adding new Organization or Contact". However, if you only want to add historical contacts that already exist in the system, please choose "Show and Map this profile to ALL Historical organizations or contacts". You can select both options according to your needs.

GRIDLEX

Inbox ▾ Zip Helpdesk ▾ Zip CRM ▾ Sky Accounting & ERP ▾ Sky Expenses ▾ Ray HRMS ▾ Objects Settings ▾ My Account ▾

Zolan
Zolan Interna.. ▾

Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities >

Activities

Organizations >

Contacts >

Schedule

Campaigns

Contracts >

Zip Helpdesk

Dashboard

Tickets

Sites

Manage Profiles Create Profile Manage Sections Create Sections

Profile Name Entity*

DEMO Zolan International Entity

	For Organizations	For Contacts
Allow this profile to be mapped to Organizations or Contacts	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Auto Select this profile while adding new Organization or Contact	<input type="checkbox"/>	<input type="checkbox"/>
Show and Map this profile to ALL historical Organizations or Contacts	<input type="checkbox"/>	<input type="checkbox"/>
Profile Order for Organizations or Contacts	<input type="text"/>	<input type="text"/>

Submit

You have successfully created custom profiles with existing custom fields in Gridlex App Suite.