

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

Organizing, visualizing, and analyzing data is paramount in today's fast-paced professional world. With the listing view in Gridlex, you have an intuitive interface coupled with powerful features to meet these needs.

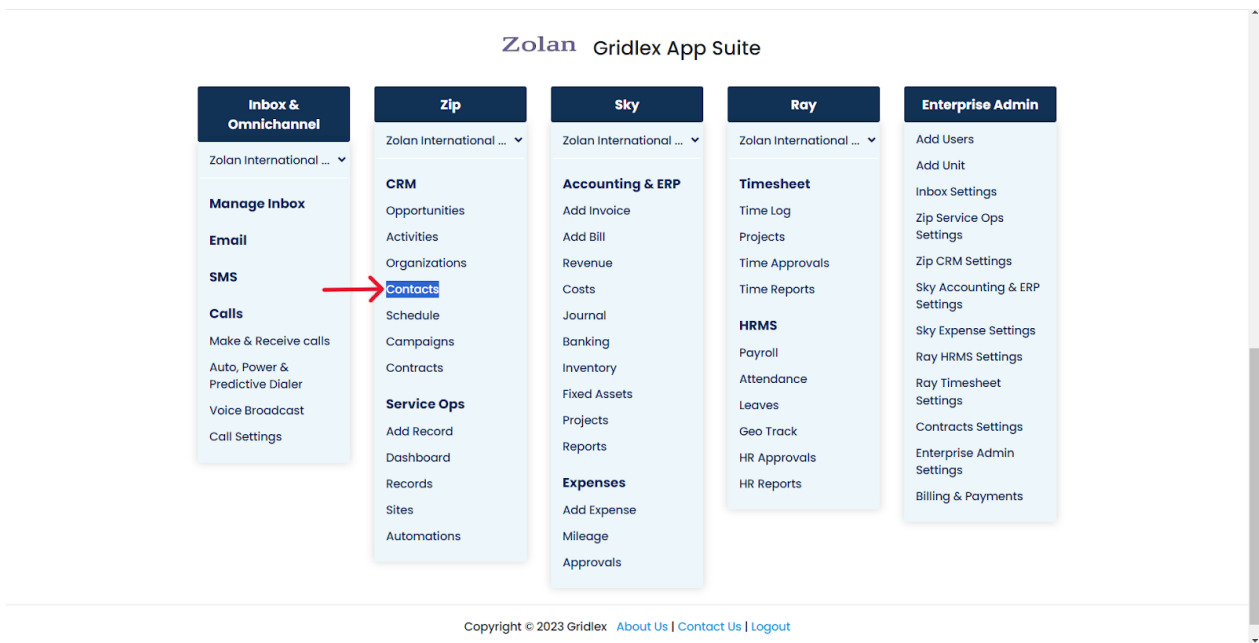
This tutorial will walk you through the following:

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

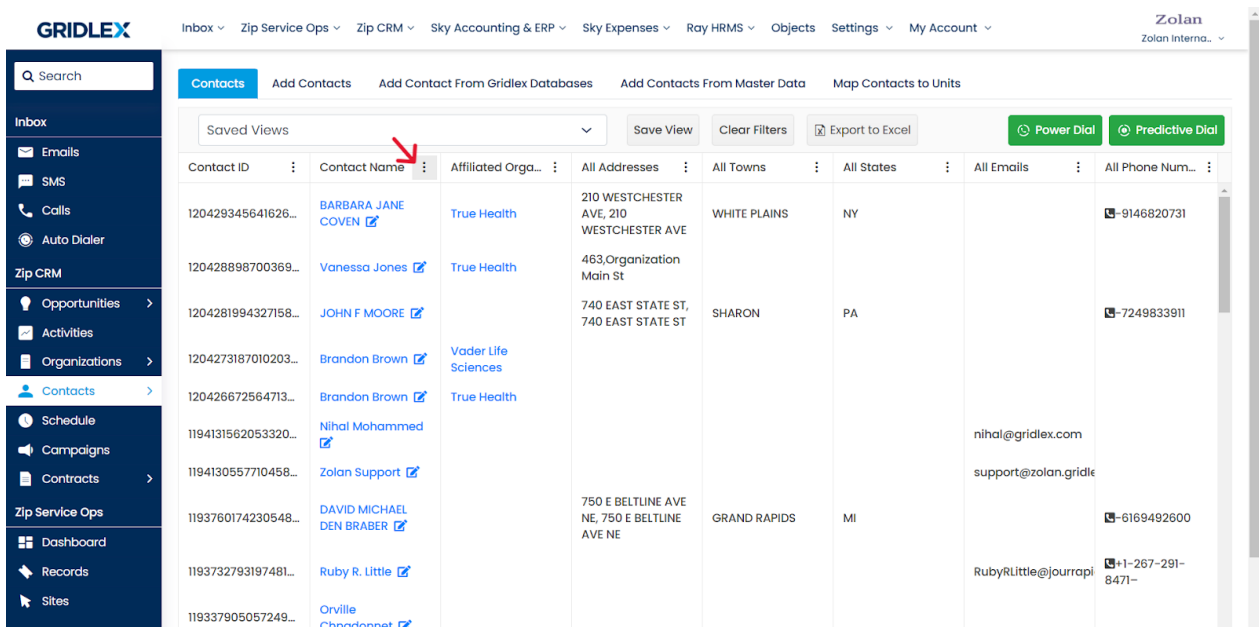
Note: We are using the Contacts module as an example to explain the listing view functions. The same features apply to all the modules, such as opportunities, activities, organizations etc.

Step 1: Log in to Gridlex App Suite. Navigate to the "Contacts" module found under the "Zip" section.

Note: While this guide uses "Contacts" as an example, the steps apply to other modules like opportunities, activities, and organizations.



Step 2: Click on the three-dot menu to access column settings. Clicking on it will provide a dropdown of various settings options.



Step 3: From the dropdown, users have the choice to sort contacts in ascending or descending order based on the selected column. This is handy when you have numerous entries, and you want to quickly locate specific ones.

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Saved Views ▾

Save View

Clear Filters

Export to Excel

Power Dial

Predictive Dial

| Contact ID | Contact Name | Affiliated Orga... | All Addresses | All Towns | All States | All Emails | All Phone Num... |
|----------------------|--------------------------|---------------------|---|--------------|------------|----------------------|------------------|
| 120429345641626... | BARBARA JANE COVEN | | | | | | 820731 |
| 120428898700369... | Vanessa Jones | | | | | | |
| 12042819943227158... | JOHN F MOORE | | 740 EAST STATE ST, 740 EAST STATE ST | SHARON | PA | | +1-7249833911 |
| 1204273187010203... | Brandon Brown | Vader Life Sciences | | | | | |
| 120426672564713... | Brandon Brown | True Health | | | | | |
| 1194131562053320... | Nihal Mohammed | | | | | nihal@gridlex.com | |
| 1194130557710458... | Zolan Support | | | | | support@zolan.gridle | |
| 1193760174230548... | DAVID MICHAEL DEN BRABER | | 750 E BELTLINE AVE NE, 750 E BELTLINE AVE NE | GRAND RAPIDS | MI | | +1-6169492600 |
| 1193732793197481... | Ruby R. Little | | | | | RubyRLittle@jourrap | +1-267-291-8471- |
| 119337905057249... | Orville Chnadonnet | | | | | | |

Advanced Features Overview:

1. Managing Columns

In the 'Columns' dropdown, you'll notice checkboxes. Checking these boxes determines which columns are displayed on the page. Once you've made your selection, click the 'Apply' button to update the listing view. The view will reflect your choices.

Note: If you want to revert to the original settings, there's a 'Reset' button. Click it, and all customizations will be reverted. Remember, if you've already applied changes and want to undo a few, you'll need to manually deselect columns.

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Search

Inbox

- Emails
- SMS
- Calls
- Auto Dialer
- Zip CRM
- Opportunities >
- Activities
- Organizations >
- Contacts >**
- Schedule
- Campaigns
- Contracts >
- Zip Service Ops
- Dashboard
- Records
- Sites

Contacts Add Contacts Add Contact From Gridlex Databases Add Contacts From Master Data Map Contacts to Units

Saved Views ▾ Save View Clear Filters Export to Excel Power Dial Predictive Dial

| Contact ID | Contact Name | Affiliated Orga... | All Addresses | All Towns | All States | All Emails | All Phone Num... |
|---------------------|--------------------------|--------------------|--|--------------|------------|----------------------|------------------|
| 120429345641626... | BARBARA JANE COVEN | | | | | | 820731 |
| 120428898700369... | Vanessa Jones | | | | | | |
| 1204281994327158... | JOHN F MOORE | | | | | | 833911 |
| 1204273187010203... | Brandon Brown | | | | | | |
| 120426672564713... | Brandon Brown | | | | | | |
| 1194131562053320... | Nihal Mohammed | | | | | | |
| 1194130557710458... | Zolan Support | | | | | | |
| 1193760174230548... | DAVID MICHAEL DEN BRABER | | 750 E BELTLINE AVE NE, 750 E BELTLINE AVE NE | GRAND RAPIDS | MI | | 6169492600 |
| 1193732793197481... | Ruby R. Little | | | | | RubyRLittle@jourrapi | +1-267-291-8471- |
| 119337905057249... | Orville Chnadonnet | | | | | | |

Columns: CONTACT NATIVE FIELDS

- ☒ Contact ID
- ☒ Contact Name
- ☐ First Name
- ☒ Middle Name
- ☐ Last Name

Reset **Apply**

Filter: Set Column Position

Note: Want a specific column at the beginning or the end? Simply drag and drop the column to its new position.

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| Contact ID | Contact Name | All Addresses | All Towns | All States | All Emails | All Phone Num... |
|---------------------|--------------------------|---------------------|--------------|------------|----------------------|------------------|
| 120429345641626... | BARBARA JANE COVEN | True Health | WHITE PLAINS | NY | | 9146820731 |
| 120428898700369... | Vanessa Jones | True Health | | | | |
| 1204281994327158... | JOHN F MOORE | | SHARON | PA | | 7249833911 |
| 1204273187010203... | Brandon Brown | Vader Life Sciences | | | | |
| 120426672564713... | Brandon Brown | True Health | | | | |
| 1194131562053320... | Nihal Mohammed | | | | niha@gridlex.com | |
| 1194130557710458... | Zolan Support | | | | support@zolan.gridle | |
| 1193760174230548... | DAVID MICHAEL DEN BRABER | | GRAND RAPIDS | MI | | 6169492600 |
| 1193732793197481... | Ruby R. Little | | | | RubyRLittle@jourrapi | +1-267-291-8471- |
| 119337905057249... | Orville Chnadonnet | | | | | |

2. Using the Filter Feature

The filter is a powerful tool to streamline your displayed data. Whether you have a keyword, date, or specific criterion, the filter will help you narrow down the list. For example, let's say you're interested in a contact named

“Ruby.” Enter this keyword in the Contact Name filter section. Next, specify whether the keyword should match all criteria (AND) or any of the criteria (OR). After setting your conditions, click on the 'Filter' button.

The screenshot shows the GRIDLEX CRM interface. On the left is a sidebar with navigation options: Inbox, Emails, SMS, Calls, Auto Dialer, Zip CRM, Opportunities, Activities, Organizations, Contacts, Schedule, Campaigns, Contracts, Zip Service Ops, Dashboard, Records, and Sites. The main area displays a list of contacts. A dropdown menu is open for the 'Contact Name' column, showing options for sorting (Ascending, Descending) and filtering. The 'Filter' section is active, with 'Contains' selected. The text 'ruby' is entered in the filter input field, and the 'And' button is selected. A red arrow points to the 'Filter' button. The contact list includes details like Contact ID, Contact Name, Affiliated Org., All Addresses, All Towns, All States, All Emails, and All Phone Numbers.

Note: For a fresh start, you can wipe all the set filters with the 'Clear Filters' option.

This screenshot shows the same GRIDLEX CRM interface, but with the 'Clear Filters' button highlighted by a red arrow. The contact list is now displayed without any filters applied. The contact details are visible, including Contact ID, Contact Name, Affiliated Org., All Addresses, All Towns, All States, All Emails, and All Phone Numbers. The 'Clear Filters' button is located in the top right corner of the contact list area.

3. Column Positioning

Some columns are crucial and need to be constantly visible. To achieve this, use the 'Stick Column' function. For instance, if you want 'Contact Name' and 'Contact ID' to be perpetually visible, even while scrolling, stick these columns. Feel like changing which columns are stuck? Use the 'Unstick Column' option to revert them back to their scrollable state.

The screenshot shows the GRIDLEX CRM interface. On the left is a sidebar with navigation options: Inbox, Emails, SMS, Calls, Auto Dialer, Zip CRM, Opportunities, Activities, Organizations, Schedule, Campaigns, Contracts, Zip Service Ops, Dashboard, Records, and Sites. The main area displays a 'Contacts' list with columns: Contact ID, Contact Name, Affiliated Orga..., All Addresses, All Towns, All States, All Emails, and All Phone Num... A context menu is open over the 'Contact Name' column, showing options: Sort Ascending, Sort Descending, Columns, Filter, Set Column Position, Stick Column (highlighted with a red arrow), and Unstick Column. The contact list includes entries for Barbara Jane Coven, Vanessa Jones, John F. Moore, Brandon Brown, Nihal Mohammed, Zolan Support, David Michael Den Braber, Ruby R. Little, and Orville Chnadonnet.

4. Exporting to Excel

If you need your data offline or in a spreadsheet format for further analysis, the 'Export to Excel' feature is your friend. Click the 'Export to Excel' option. A spreadsheet will be automatically generated and downloaded, mirroring your current listing view, including filters, column choices, and positions.

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| Contact ID | Contact Name | Affiliated Orga... | All Addresses | All Towns | All States | All Emails | All Phon |
|---------------------|--------------------------|---------------------|--|--------------|------------|---------------------------|--------------|
| 1204293456416264193 | BARBARA JANE COVEN | True Health | 210 WESTCHESTER AVE, 210 WESTCHESTER AVE | WHITE PLAINS | NY | | 91468 |
| 1204288987003695105 | Vanessa Jones | True Health | 463,Organization Main St | | | | |
| 1204281994327158785 | JOHN F MOORE | | 740 EAST STATE ST, 740 EAST STATE ST | SHARON | PA | | 7249 |
| 1204273187010203649 | Brandon Brown | Vader Life Sciences | | | | | |
| 1204266725647134721 | Brandon Brown | True Health | | | | | |
| 1194131562053320705 | Nihal Mohammed | | | | | nihal@gridlex.com | |
| 1194130557710458881 | Zolan Support | | | | | support@zolan.gridlex.com | |
| 1193760174230548481 | DAVID MICHAEL DEN BRABER | | 750 E BELTLINE AVE NE, 750 E BELTLINE AVE NE | GRAND RAPIDS | MI | | 61694 |
| 1193732793197481985 | Ruby R. Little | | | | | RubyRLittle@jourrap | +1-267-8471- |
| 1193379050572492801 | Orville Chnadonnet | | | | | | |

Additional Features in the listing view:

1. Column Resizing

Want to see more data within a column or less? You can manually adjust a column's width. Hover over a column's border until your cursor changes, then click and drag to your preferred size.

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|---------------------|--------------------------|---------------------|--|--------------|------------|---------------------------|------------------|
| 120431006255074... | Dua | | | | | | 3896337795 |
| 120431006216906... | Shawn | | | | | | +1-4233577941 |
| 120429345641626... | BARBARA JANE COVEN | True Health | 210 WESTCHESTER AVE, 210 WESTCHESTER AVE | WHITE PLAINS | NY | | 9146820731 |
| 120428898700369... | Vanessa Jones | True Health | 463,Organization Main St | | | | |
| 1204281994327158... | JOHN F MOORE | | 740 EAST STATE ST, 740 EAST STATE ST | SHARON | PA | | 7249833911 |
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2. Saving Personalized Views

If you've set up the listing view in a way that suits your workflow, you can save it. To ensure it remains private to you, select 'Keep Private' and then hit 'Save.'

Note: To make a saved view accessible to team members or other users, select the appropriate visibility option from the checklist.

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

The screenshot displays the Gridlex application interface. A 'Save view' modal is open, allowing the user to configure a new saved view. The modal includes a 'Name' input field and two sections for configuring visibility: 'For Listing Page' and 'For Search Results'. In the 'For Listing Page' section, the 'Keep Private - Just for me' option is selected. In the 'For Search Results' section, the 'Default For Search Results for Myself Private' option is selected. The background shows a table of contact data with columns for Contact ID, Name, Address, and Phone. The table lists several contacts, including David Michael Den Braber, Ruby R. Little, and Orville Chnadonnet.

Note: The 'Hide' function in the 'Action' column is a way to temporarily remove specific entries from your view, similar to a 'Delete' option. But fear not; any hidden data can be retrieved. Simply contact Gridlex's support team at apps@gridlex.com.

Congratulations! You have now learned how to utilize the 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.

