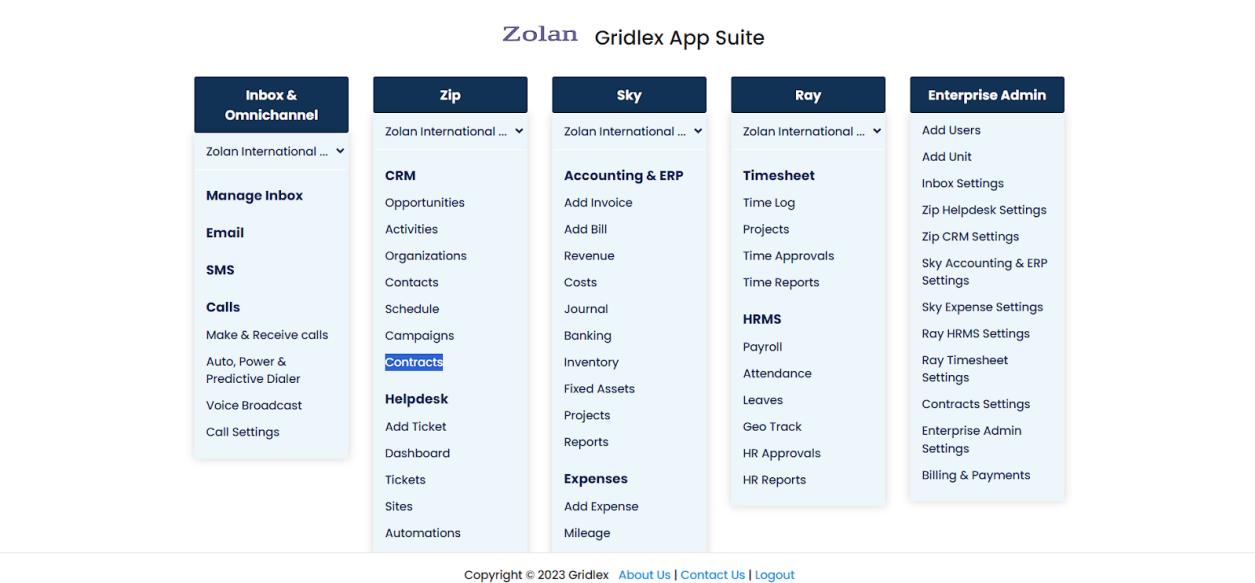


Welcome to our tutorial on how to create a saved view in contract listing in Gridlex Zip.

In this tutorial, we'll guide you step-by-step on how to save specific views for your contract listing page.

Step 1: Log in to Gridlex App Suite and click ‘Contracts’ under the Zip section in the navigation menu.



Step 2: Make changes as per your requirement on the contracts listing page,

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 Name	Contract ID	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	C
Clinical Trial Agreement	118979547225799...						
Distribution Agreement	118902806680372...						
Quality Control Contracts	118902533597628...						
Drug Testing Contract	1189021413916155...						

Columns

Search for Columns Clear Search

CONTRACT NATIVE FIELDS

☒ Contract Name

☒ Contract ID

☐ Contract Template Name

☐ Sub-Contract Name

☒ Contract Start Date

Reset Apply

Filter

Set Column Position

General Contract Template Jan 01,2023 Mar 01,2023 Dec 31,2025 Expires in 856 Days Z

Step 3: Click 'Save View'

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 Name	Contract ID	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	Counterparties - (Contract Counterparties)
Clinical Trial Agreement	118979547225799...					
Distribution Agreement	118902806680372...		Jan 01,2023			United Resources
Quality Control Contracts	118902533597628...	Apr 01,2023				
Drug Testing Contract	1189021413916155...	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 856 Days	Zember Partners

Step 4: Managing saved view access

1. To share the saved view access to all users, check the 'Share with Zolan International Entity (Live)' box.

Note: 'Zolan International Entity' is only an example. You will see the entity you're part of here.

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

Save view

Contract Name:

☒ Share With Zolan International Entity (Live) Entity ☐ Set as Default

☐ Share with specific Units only

☐ Share with specific Users only

☐ Keep Private - Just for me ☐ Set as Default

Cancel Save

Contract Name	Contract ID	Contract Start Date	Contract End Date	Contract Due Date	Expires in	Counterparties - (Contract Counterparties)
Clinical Trial Agreeer	118902533597628...	Apr 01, 2023				
Distribution Agreeer						United Resources
Quality Control Contracts	118902533597628...	Apr 01, 2023				
Drug Testing Contract	1189021413916155...	Jan 01, 2023	Mar 01, 2023	Dec 31, 2025	Expires in 856 Days	Zember Partners

https://go.gridlex.com/b/300/ep/5486/

2. To restrict the saved view access to units of your choice, select "Share with specific Units only" and choose the users you wish to share the saved view with.

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

Save view

Contract ID:

☐ Share With Zolan International Entity (Live) Entity ☐ Set as Default

☒ Share with specific Units only

☐ Super Admin

☐ Zip Helpdesk Demo

☐ Marketing Unit

☐ Dua Unit - Ray

☐ Share with specific Users only

☐ Keep Private - Just for me ☐ Set as Default

Cancel Save

Contract ID	Contract Name	Contract Start Date	Contract End Date	Contract Due Date	Expires in	Counterparties - (Contract Counterparties)
118902533597628...	Quality Control Contracts	Apr 01, 2023				
11890214139161559...	Drug Testing Contract	Jan 01, 2023	Mar 01, 2023	Dec 31, 2025	Expires in 856 Days	Zember Partners

3. To restrict the saved view access to users of your choice, select "Share with specific Users only" and choose the users you wish to share the saved view with.

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

Save view

Contract Name: Name *

Zolan Operations

☐ Share With Zolan International Entity (Live) Entity ☐ Set as Default
☐ Share with specific Units only
☒ Share with specific Users only

☒ Jennie Daniel
☒ John Doe
☐ Dua Murphy

☐ Keep Private - Just for me ☐ Set as Default

Cancel Save

Clinical Trial Agreement

Distribution Agreement

Contract ID	Contract Name	Contract Start Date	Contract End Date	Contract Due Date	Contract Status	Contract Counterparties
118902533597628...	Quality Control Contracts	Apr 01, 2023				United Resources
1189021413916155...	Drug Testing Contract	Jan 01, 2023	Mar 01, 2023	Dec 31, 2025	Expires in 856 Days	Zember Partners

4. Check the 'Keep Private - Just for me' option to save the view for only yourself.

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

Save view

Contract ID: Name *

☐ Share With Zolan International Entity (Live) Entity ☐ Set as Default
☐ Share with specific Units only
☐ Share with specific Users only
☒ Keep Private - Just for me ☒ Set as Default

Cancel Save

118979547225799...

118902806680372...

Contract ID	Contract Name	Contract Start Date	Contract End Date	Contract Due Date	Contract Status	Contract Counterparties
118902533597628...	Quality Control Contracts	Apr 01, 2023				United Resources
1189021413916155...	Drug Testing Contract	Jan 01, 2023	Mar 01, 2023	Dec 31, 2025	Expires in 856 Days	Zember Partners

Once you make the desired selections, click 'Save' to create the saved view.

Note: You can also set a view as default by checking the 'Set as Default' box. The default view will automatically display when you access the contracts listing page.

Congratulations! You have now learned how to create a saved view contract listing 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 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.