

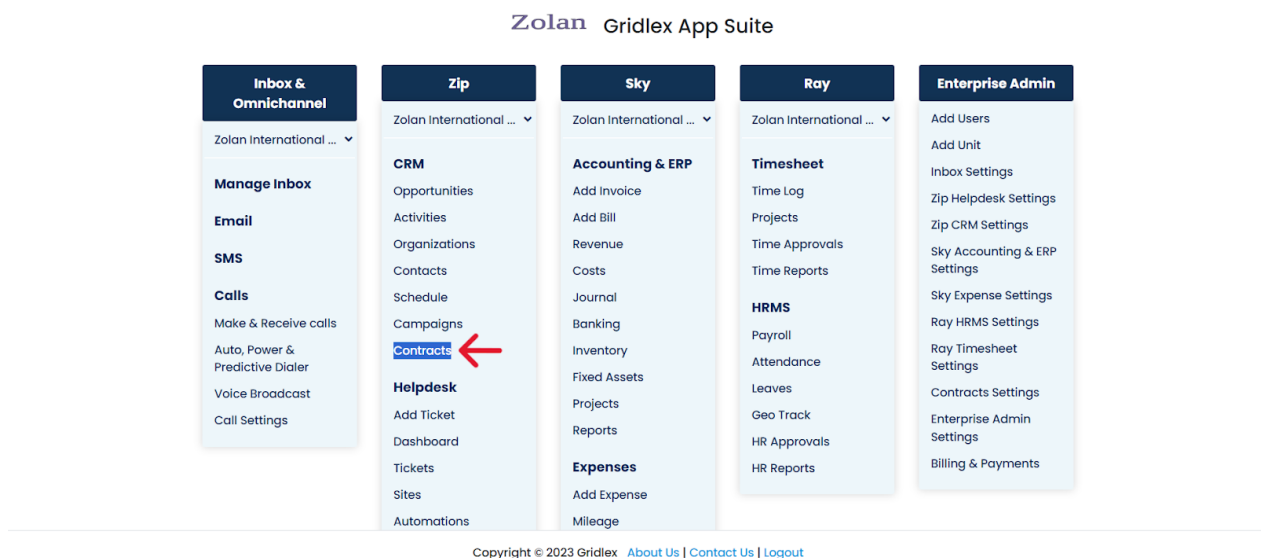
Welcome to our comprehensive guide on utilizing the listing view in Gridlex.

The contract listing view is designed to streamline these tasks, offering an intuitive interface and powerful features that adapt to your unique 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

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



Step 2: Click on the three-dot menu to reveal the column settings.

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Zip CRM
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Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	
118902806680372...	Distribution Agreement	General Contract Template		Jan 01,2023			U
118902533597628...	Quality Control Contracts	General Contract Template	Apr 01,2023				
11890214139161559...	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 861 Days	Z

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Step 3: You can see multiple options here, starting with sorting the contracts in ascending or descending order; this will sort the listing view based on the column of your choice.

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118902806680372...							U
11890214139161559...	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 861 Days	Z
118902533597628...	Quality Control Contracts	General Contract Template	Apr 01,2023				

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Features:

How to use the 'Columns' option?

Under the 'Columns' option, you can check the desired columns that you want to be displayed and click 'Apply.'

You can reset the displayed columns to default by clicking 'Reset.'

The screenshot shows the GRIDLEX interface with a sidebar on the left containing navigation options like 'Inbox', 'Emails', 'SMS', 'Calls', 'Auto Dialer', 'Zip CRM', 'Opportunities', 'Activities', 'Organizations', 'Contacts', 'Schedule', 'Campaigns', 'Contracts', 'Zip Helpdesk', and 'Dashboard'. The main area displays a table with columns: 'Contract ID', 'Contract Name', 'Contract Template Name', 'Contract Start Date', 'Contract Signature and Execution Date', 'Contract End Date', 'Contract Due', and 'Counterparty'. A dropdown menu is open over the table, showing options for 'Sort Ascending', 'Sort Descending', and 'Columns'. The 'Columns' section is expanded, showing a search bar and a list of columns with checkboxes: 'Contract ID' (checked), 'Contract Name' (checked), 'Contract Template Name' (checked), 'Sub-Contract Name' (unchecked), 'Contract Start Date' (checked), and 'Contract Signature and Execution Date' (checked). There are 'Reset' and 'Apply' buttons at the bottom of the dropdown. The table below shows three items, with the first item having a 'Contract ID' of 118902141391615 and a 'Contract Due' date of 'Expires in 861 Days'.

Note: You can drag and drop a column to change its position.

The screenshot shows the GRIDLEX interface with the 'Contracts' table. The table has columns: 'Contract ID', 'Contract Name', 'Contract Template Name', 'Contract Start Date', 'Contract Signature and Execution Date', 'Contract End Date', 'Contract Due', and 'Counterparty'. The table contains three rows of data. The first row has a 'Contract ID' of 1189025335976280065 and a 'Contract Name' of 'Quality Control Contracts'. The second row has a 'Contract ID' of 1189021413916155905 and a 'Contract Name' of 'Drug Testing Contract'. The third row has a 'Contract ID' of 1189028066803728385 and a 'Contract Name' of 'Distribution Agreement'. The table also shows 'Contract Template Name', 'Contract Start Date', 'Contract Signature and Execution Date', 'Contract End Date', 'Contract Due', and 'Counterparty'. The 'Contract Due' column shows 'Expires in 860 Days' for the second row. The 'Counterparty' column shows 'Zember P...' for the second row and 'United Re...' for the third row. The table is paginated, showing 'Page 1 of 1' and '1 - 3 of 3 items'.

How to use the 'Filter' option?

This option lets you filter your listing view based on keywords of your choice. Enter the keywords, select the desired criteria from the dropdown menu, and click 'Filter.'

You can clear any filter you have applied by clicking 'Clear.'

The screenshot displays the GRIDLEX CRM interface. On the left is a dark blue sidebar with navigation links: Inbox, Emails, SMS, Calls, Auto Dialer, Zip CRM, Opportunities, Activities, Organizations, Contacts, Schedule, Campaigns, and a 'Contracts' link. Below these are 'Zip Helpdesk' and 'Dashboard', 'Tickets', and 'Sites'. The main header includes the GRIDLEX logo and a series of dropdown menus: Inbox, Zip Helpdesk, Zip CRM, Sky Accounting & ERP, Sky Expenses, Ray HRMS, Objects, Settings, and My Account. The top right corner shows the user 'Zolan' and 'Zolan Intern...'. The main content area shows a table with columns: Contract ID, Contract Name, Contract Template Name, Contract Start Date, Contract Signature and Execution Date, Contract End Date, Contract Due, and Counterparties - (Contr Counterparties). A row is visible with '11890214139161559...' and 'Drug Testing Contract'. A dropdown menu is open over the table, showing 'Sort Ascending' and 'Sort Descending' options. Below this is a 'Columns' section with a search bar and a list of checkboxes for columns: Contract Description, Users - (Associate Users), Units - (Associate Units), Status, Contract Created At, Contract Updated At, and Contract Created By. At the bottom of the dropdown is a 'Filter' section with a 'Contains' dropdown, a text input field 'Enter your keyword here', and 'And'/'Or' radio buttons. There are 'Filter' and 'Clear' buttons at the bottom of the filter section. A 'Clear Search' button is also present in the columns section. The bottom of the dropdown shows 'Set Column Position'.

Note: You can also clear all filters by clicking 'Clear Filters' on the listing view screen.

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Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	Counterparty
1189025335976280065	Quality Control Contracts	General Contract Template	Apr 01,2023				
1189021413916155905	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 860 Days	Zember P
1189028066803728385	Distribution Agreement	General Contract Template		Jan 01,2023			United Re

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How to use the ‘Set Column Position’ option?

You can click ‘Stick Column’ to pin one or more columns of your choice, always to be displayed regardless of scrolling.

You can click ‘Unstick Column’ to release the pinned columns.

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Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	Counterparty
1189028066803728385	Distribution Agreement						nited Re
1189025335976280065	Quality Control Contracts	Template	Apr 01,2023				
1189021413916155905	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 860 Days	Zember P

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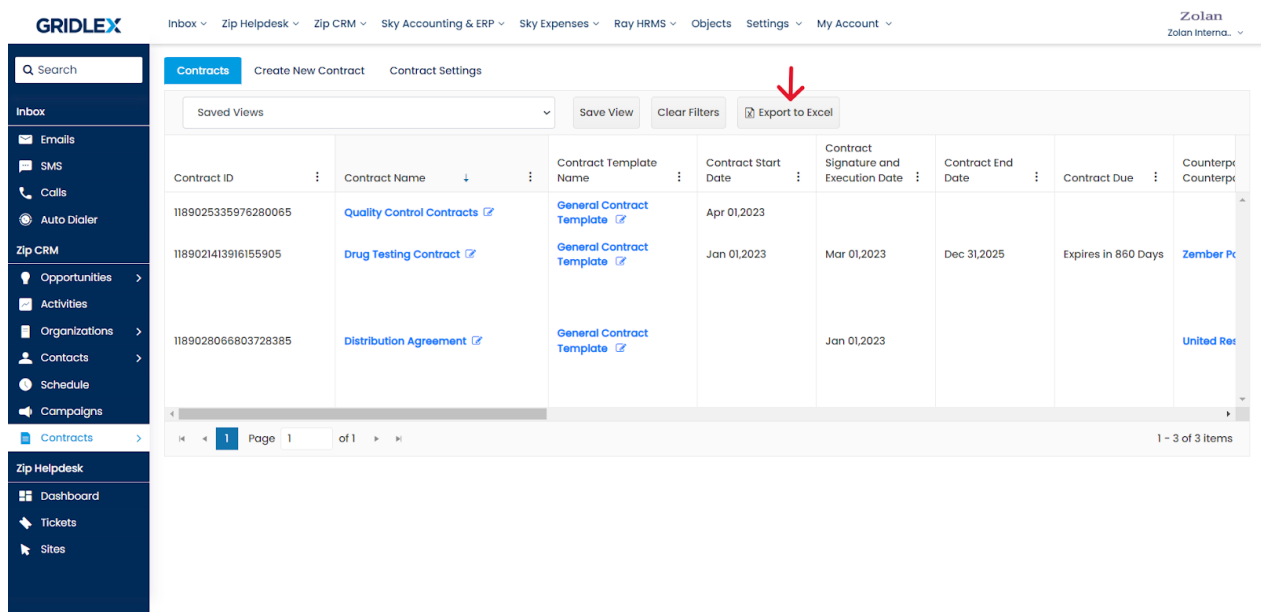
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How to use the “Export to Excel” feature?

Click ‘Export to Excel’ to export the listing view to a spreadsheet. The spreadsheet will be downloaded to your computer.

The exported spreadsheet will reflect the selected filters, columns you have chosen, and column positions.



The screenshot shows the GRIDLEX interface with the 'Contracts' tab selected. A red arrow points to the 'Export to Excel' button in the top right of the table area. The table displays contract details with columns for ID, Name, Template, Start Date, Signature/Execution Date, End Date, Due Date, and Counterparty.

Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	Counterparty
1189025335976280065	Quality Control Contracts	General Contract Template	Apr 01,2023				
1189021413916155905	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 860 Days	Zemmer P...
1189028066803728385	Distribution Agreement	General Contract Template		Jan 01,2023			United Re...

Additional Features in the Listing View:

You can click and drag a column's border to resize it to your desired width.

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Contract ID	Contract Name	Contract Template Name	Contract Start Date	Contract Signature and Execution Date	Contract End Date	Contract Due	Counterparty Counterp
1189028066803728385	Distribution Agreement	General Contract Template		Jan 01,2023			United Re
1189025335976280065	Quality Control Contracts	General Contract Template	Apr 01,2023				
1189021413916155905	Drug Testing Contract	General Contract Template	Jan 01,2023	Mar 01,2023	Dec 31,2025	Expires in 860 Days	Zember Pc

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To save the selected view just for yourself, choose the 'Keep Private' option and then click 'Save.' If you want the saved view to be visible to others, pick your preferred visibility option from the checklist.

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

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Contract ID	Contract Name	Contract Template	Contract Start	Contract Signature and	Contract End Date	Contract Due	Counterparty Counterp
1189025335976280065							
1189021413916155905					Dec 31,2025	Expires in 860 Days	Zember Pc
1189028066803728385							United Rec

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Save view

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

Note: The 'Hide' option in the 'Action' column is similar to 'Delete.'
However, you can retrieve hidden contracts by contacting
app@gridlex.com.

Congratulations! You have now learned how to utilize the contract 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.