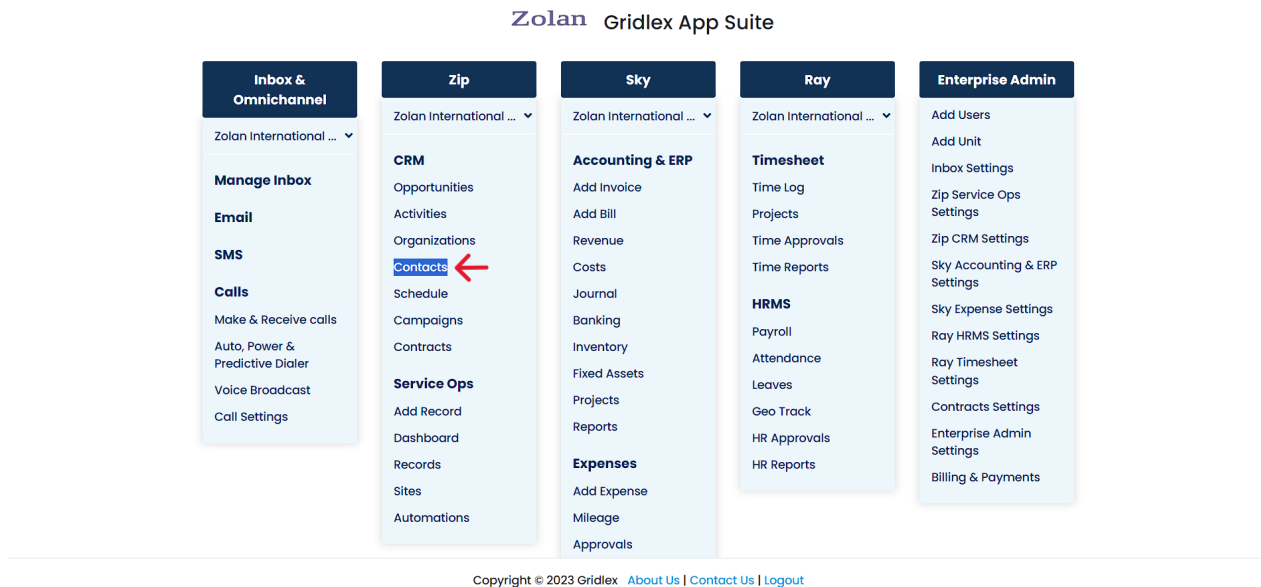


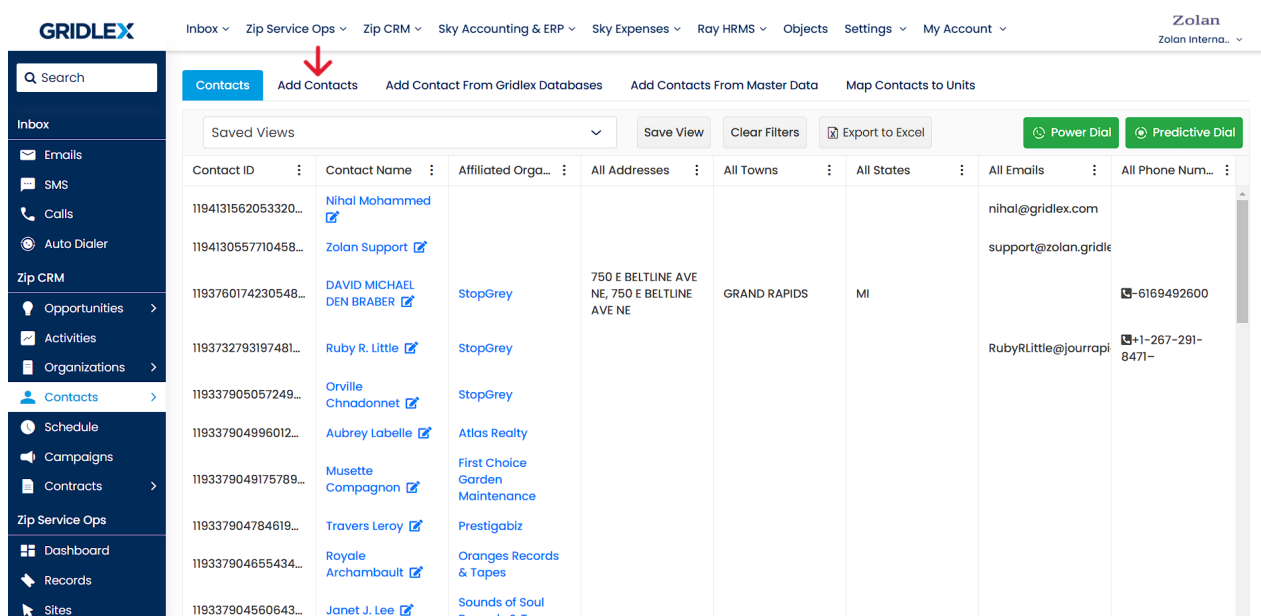
In Gridlex Zip, there are multiple ways to add contacts: manually, by importing, or through the organization page. This guide will specifically explain the process of adding a contact manually.

Step 1: Log in to the Gridlex App Suite and click on 'Contacts' located under the Zip section.



Step 2: Once you're on the Contacts page, you'll see an option to “Add Contacts.” Click on it to proceed.

Note: The availability of this feature depends on your assigned permissions. If you don't have the permission to view or add contacts, you'll be unable to do so. To obtain access, please reach out to your enterprise admin.



Step 3: A form will appear, prompting you for the contact's information.

GRIDLEX

Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Zip Service Ops

Dashboard

Records

Sites

Inbox

Zip Service Ops

Zip CRM

Sky Accounting & ERP

Sky Expenses

Ray HRMS

Objects

Settings

My Account

Zolan

Zolan Interna...

Contacts

Add Contacts

Add Contact From Gridlex Databases

Add Contacts From Master Data

Map Contacts to Units

Add New Contact

Import

Previous File Imports

Import Logs

Basic Information

Contact Name

First Name

Middle Name

Last Name

Brandon Brown

Brandon

Brown

Title

Mr

Visible to *

Visible to all units

Visible to selected units

Affiliate Organization

Organization Name

Phone Number

Email

City/Town

State

Search for a organization

7707047078

Email

Canton

Georgia(GA)

Submit

The screenshot shows the 'Add New Contact' form in the Zip CRM interface. The left sidebar contains navigation links: Inbox, Zip Service Ops, Zip CRM, Sky Accounting & ERP, Sky Expenses, Ray HRMS, Objects, Settings, and My Account. The main form area is titled 'Add New Contact' and includes a dropdown for 'Organization' set to 'True Health'. The 'Organization Name' dropdown is highlighted with a red arrow, showing 'True Health' as the selected option. The form includes fields for Name, Title, Phone Number, Email, City/Town, and State. A 'Submit' button is at the bottom right.

Step 5: Scroll down to find options for mapping your new contact. Choose the correct forms, opportunity templates, and activity templates for the contact. Once done, click on the “Submit” button to save the contact.

GRIDLEX Inbox Zip Service Ops Zip CRM Sky Accounting & ERP Sky Expenses Ray HRMS Objects Settings My Account Zolan
Zolan Interna...

Q Search

Form(s) Mapping

Select All	Forms
<input checked="" type="checkbox"/>	Contact Profile
<input type="checkbox"/>	DEMO
<input checked="" type="checkbox"/>	General Details
<input checked="" type="checkbox"/>	Plot Details
<input type="checkbox"/>	Support
<input type="checkbox"/>	Test

Opportunity Template(s) Mapping

Select All	Opportunity Template
<input type="checkbox"/>	General Opportunity Template
<input type="checkbox"/>	Default Opportunity

Activity Template(s) Mapping

Select All	Activity Template
<input type="checkbox"/>	Default Activity

Submit

Step 6: Your contact has been successfully added to Gridlex Zip. Should you need to make any changes in the future, remember you have the flexibility to edit this contact's information anytime you want.

GRIDLEX Inbox Zip Service Ops Zip CRM Sky Accounting & ERP Sky Expenses Ray HRMS Objects Settings My Account Zolan
Zolan Interna...

Q Search

BRANDON BROWN
Organization : True Health
Brandon Brown

Feed Opportunities Activities **Profile** Organizations Schedule Emails Records

Contact Attributes Form Plot Details General Details Contact Profile

Basic Information Edit Add Name

Contact Name Contact Name Type *

Brandon Brown Display Name

First Name Middle Name Last Name

Mr Brown

Notes Edit

Now, you're adept at manually adding contacts within the Gridlex Zip platform. If you're interested in other ways to manage contacts, such as importing and adding multiple contacts at once, follow this guide: [How to Import Contacts 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.

