Welcome to our comprehensive guide on managing Record files in Gridlex Zip.

Gridlex Zip includes a record history viewing feature designed to offer a comprehensive overview of past customer interactions. This feature is vital for ensuring transparency and tracking the evolution of customer requests, providing a detailed timeline of updates and communications.

In this guide, we'll walk you through the simple steps to view the record history, ensuring you comprehensively understand past interactions and changes made to a record.

**Step 1:** Log in to the Gridlex App Suite and click 'Records' under the Zip section.

Inbox & Omnichannel	Zip	Sky	Ray	Enterprise Admin
Zolan International 💙	Zolan International 💙	Zolan International 💙	Zolan International 💙	Add Users
Manage Inbox Email SMS Calls Make & Receive calls Auto, Power & Predictive Dialer Voice Broadcast	CRM Opportunities Activities Organizations Contacts Schedule Campaigns Contracts Evente	Accounting & ERP Add Invoice Add Bill Revenue Costs Journal Banking Inventory Eived Assets	Timesheet Time Log Projects Time Approvals Time Reports HRMS Payroll Attendance	Add Jnit Inbox Settings Zip Service Ops Settings Zip CRM Settings Sky Accounting & ERP Settings Sky Expense Settings Ray HRMS Settings Ray Timesheet Settings Contracts Settings
Call Settings	Service Ops Add Record	Projects Reports	Leaves Geo Track HR Approvals	Enterprise Admin Settings Billing & Payments
	Dashboard Records Sites Automations	Expenses Add Expense Mileage	HR Reports	

Step 2: Select the record that you want to see the history of.

GRIDLEX	Inbox × Zip Service Ops × Zip CRM × Sky Accounting & ERP × Sky Expenses × Ray HRMS × Objects Settings × My Account ×					Zolan Zolan Interna.	
Q Search	List of Saved Views	✓ Save View Clear Filters			X	Export to Excel	Add New
Inbox	Record ID	Record Subject (Subject)	Status :	Priority :	Labels	Units	: Assiç
💌 Emails 💴 SMS	1189798791344771072	BioPharm Innovations Collaboration Agreement		High	Bugs		•
Calls	1189785507820425216	Re: ReSchedule Request - Anti-infective therapy sessions.					
Zip CRM	1189752244775112704	Delivery Status Notification (Failure)	Form Submitted				
Opportunities >	1189453412107497472	Clinical Trial Agreement	Initial Inquiry	Critical			
Organizations >	1189399286401159168	Urgent: System Issues	Initial Inquiry	High	Bugs		
Contacts >	1189398883861221376	Testing 2	Initial Inquiry				
<ul> <li>Schedule</li> <li>Campaians</li> </ul>	1189396927956602880	Testing 1					
Contracts	1189087660854693888	One plus - Distribution	Competitor Research			Super Admin, Zip Helpdesk Demo	Νανγ
Zip Service Ops	1165909382526574592	Appointment Confirmation	New	Normal	Orders		
Dashboard     Records	1165908935711563776	Appointment Confirmation		Normal	Orders		
K Sites	1165905898775420928	Appointment Confirmation		Normal	Orders		

## Step 3: Click 'History.'

GRIDLEX	Inbox - Zip Service Ops - Zip CRM - Sky Accounti	ing & ERP ~ Sky Expenses ~ Ray HRMS ~ Object	s Settings ~ My Account ~	Zolan Zolan Interna V
Q Search	🗲 Clinical Trial Agreement 🛛 🕝			
Inbox	Channel: Email Workflow: Product Inquiry Status	: Initial Inquiry Priority : Critical Model : Contract Cre	eated on: 🏥 Aug. 24, 2023, 8:28 a.m. EDT 🛛 SLA Name: -	
🖂 Emails	Communication - Comments and Notes	information History Files	Delete Record	nvert to Contract
SMS		<b>^</b>		
📞 Calls	- Collapse all	•		🕼 Edit
Auto Dialer	- Record Standard Information			
Zip CRM				
Opportunities >	Record ID	Model *	Workflow*	
Z Activities	1189453412107497472	Contract	Product Inquiry	
Organizations >				
Contacts >	Status *	Channel	Priority	
Schedule	Initial Inquiry	Email	Critical	
	Labels	ter dan ter be	ter land term	
	-	-	Assign User	
- Contraction				
	Record Description *			
Zip Service Ops	The Clinical Trial Agreement between BioNexa	Pharmaceuticals and GreenLabs Research Institut	te outlines the collaboration where GreenLabs agrees to conduct a sp	ecific clinical
Dashboard	trial for a drug provided by BioNexa. Key eleme stemming from the trial's results, confidentialit	ents of the agreement include the trial's protocol, r ty clauses, and the gareement's duration. Both par	esponsibilities of GreenLabs, compensation details, intellectual prope ties must maintain strict confidentiality and follow specific auideline	rty rights s and
Records	milestones as stipulated in the attached Proto	col. The contract emphasizes the importance of el	thical conduct, proper reporting, and the legal framework under whic	h any
Sites	discoveries or inventions will be managed.			
	The Clinical Trial Agreement between BioNexa	Pharmaceuticals and GreenLabs Research Institu	te is a pivotal document formalizing their collaborative effort in the re	alm of drug

**Step 4:** On this page, scroll to view the changes made to the record. The latest modifications will be on top. Furthermore, you can also view the name of the user who made the changes along with the date.

GRIDLEX	Inbox 🗸 Zip Service Ops 🗸 Zip CRM 🗸 Sky Accounting & ERP 🗸 Sky Expenses 🗸 Ray HRMS 🗸 Objects Settings 🗸 My Account 🗸	Zolan Zolan Interna v
Q Search	+ Clinical Trial Agreement 3	
Inbox	Channel : Email Workflow : Product Inquiry Status : Initial Inquiry Priority : Critical Model : Contract Created on: 🛗 Aug. 24, 2023, 8:28 a.m. EDT SLA Name: -	
🖂 Emails	Communication - Comments and Notes Information History Files and Delete Record	Convert to Contract
📁 SMS	<u>и</u>	
Calls	Mohammed Nihal TT updated the record (Tue, Oct 10, 7:53 a.m. EDT)	
Auto Dialer	Contact: Brandon Brown was Associated	
Zip CRM		
Opportunities >	Mohammed Nihal TT updated the record (Tue, Oct 10, 7:52 a.m. EDT)	
	Organization: True Health was Associated	
Contacts >	Mahammad Nikal TT undated the record (buy on N 3 (1 Tat)	
Schedule	Mondminied windi in apaded the record (rue, oct w, 747 am col)	
┥ Campaigns	Counterparties : True Health was Disassociated	
Contracts >	Mohammed Nihal TT updated the record (Tue Oct 10.7:44 am. EDT)	
Events		
Zip Service Ops	Counterparties : Irue Health was Associated	
Dashboard	Mohammed Nihal TT updated the record (Tue, Oct 10, 7:38 a.m. EDT)	
Records	Orranization · True Hadth was Dissessinited	
Sites	Contact: Brandon Brown was Disassociated	

Congratulations! You have now learned to view record history in Gridlex Zip.

If you need any help with any feature, data migration of your old data, or anything at all, just email <u>apps@gridlex.com</u> 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.