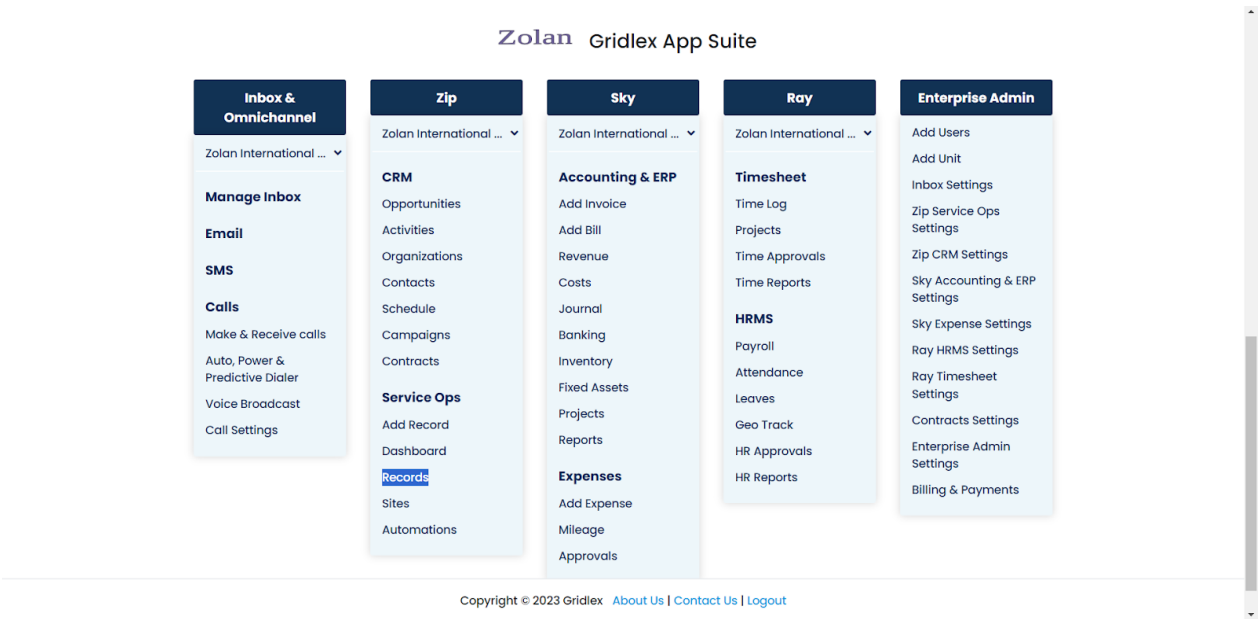


Welcome to our guide! In Gridlex Zip, it's easy to transform user-submitted records into contracts. This ensures a fluid transition of important information from the record directly into your new contract. Let's dive into the step-by-step process.

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



Step 2: From the list of available records, select the specific record you wish to transform into a contract.

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Inbox

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Zip CRM

Sky Accounting & ERP

Sky Expenses

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Search

List of Saved Views

Save View

Clear Filters

Export to Excel

Add New

Record ID	Record Subject (Subject)	Status	Priority	Labels	
1204310655307010048	System Issues	Form Submitted	Critical	Southeast, Technical Issues	S
1203868156109205504	[ignore] Test custom fields with Signature field - Oct 03 12:32 PM	Assigned to Support Executive			
ITAUG-31-23123	[Test][Ignore] This is a test ticket.	Internal Review	Low	Support	
1191550729023336448	Urgent - System issues - John (Employee ID: J1235)	Form Submitted	Critical		
1189798791344771072	BioPharm Innovations Collaboration Agreement	Form Submitted	High	Bugs	
1189785507820425216	Re: ReSchedule Request - Anti-infective therapy sessions.	Form Submitted			
1189752244775112704	Delivery Status Notification (Failure)	Form Submitted			
1189453412107497472	Clinical Trial Agreement	Initial Inquiry	Critical		
1189399286401159168	Urgent: System Issues	Initial Inquiry	High	Bugs	
1189398883861221376	Testing 2	Initial Inquiry			

Step 3: Look for the ‘Convert to Contract’ option located at the top right corner and click it.

Note: The 'Convert to Contract' link will only be visible if the model of the record is configured to display it.

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Clinical Trial Agreement

Channel : Email Workflow : Product Inquiry Status : Initial Inquiry Priority : Critical Model : Contract Created on: Aug. 24, 2023, 8:28 a.m. EDT SLA Name: -

Communication

Comments and Notes

Information

History

Files

Delete Record

Convert to Contract

Collapse all

Edit

Record Standard Information

Record ID	Model *	Workflow *
1189453412107497472	Contract	Product Inquiry
Status *	Channel	Priority
Initial Inquiry	Email	Critical
Labels	Assign Units	Assign User
-	-	-

Record Description *

The Clinical Trial Agreement between BioNexa Pharmaceuticals and GreenLabs Research Institute outlines the collaboration where GreenLabs agrees to conduct a specific clinical trial for a drug provided by BioNexa. Key elements of the agreement include the trial's protocol, responsibilities of GreenLabs, compensation details, intellectual property rights stemming from the trial's results, confidentiality clauses, and the agreement's duration. Both parties must maintain strict confidentiality and follow specific guidelines and milestones as stipulated in the attached Protocol. The contract emphasizes the importance of ethical conduct, proper reporting, and the legal framework under which any discoveries or inventions will be managed.

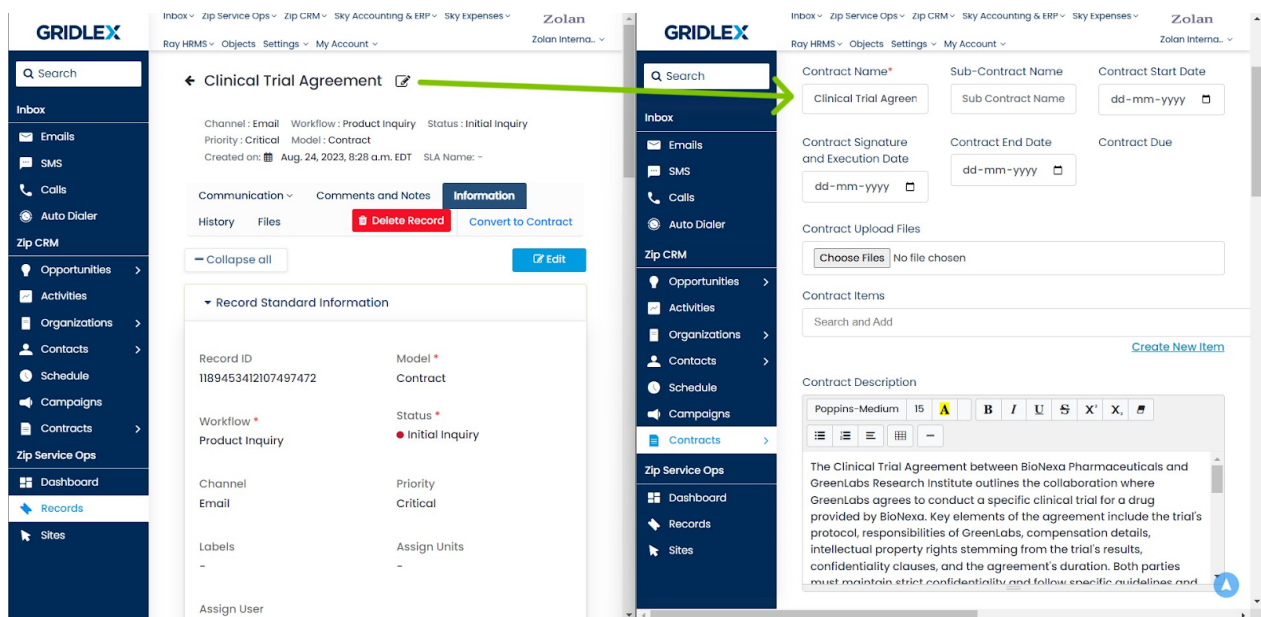
Step 4: Upon initiating the conversion, various fields within the contract form will be automatically populated based on details from the record.

For instance:

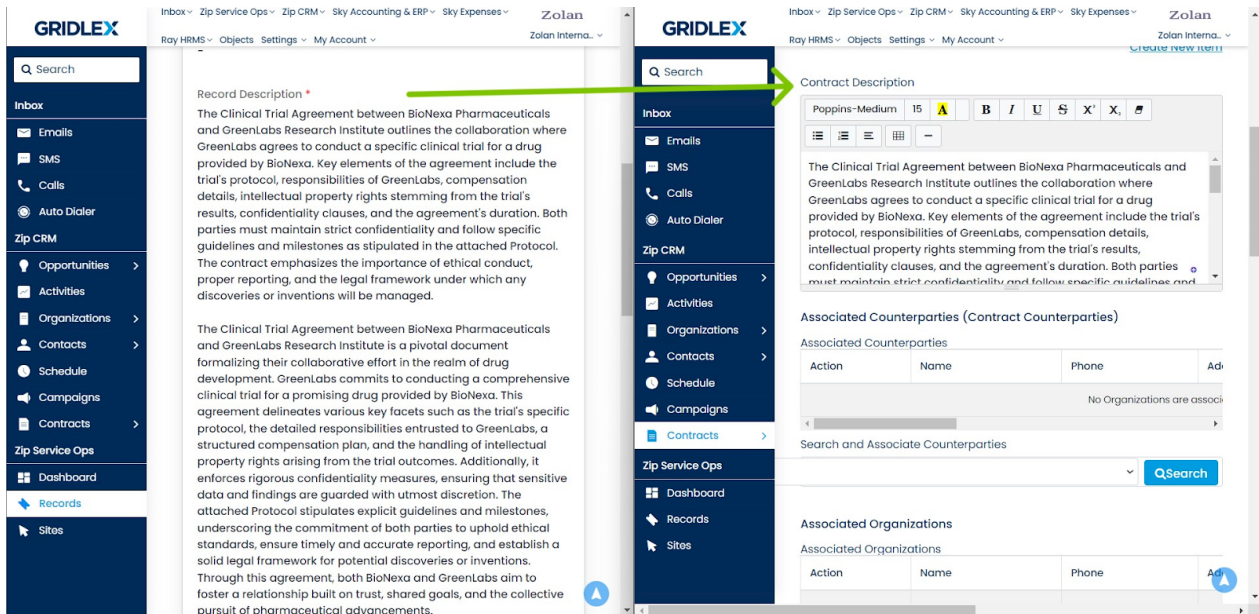
- Record Subject becomes the Contract Name.
- Record Description translates to Contract Description.
- All Attachments within the record are imported.
- Record Associations are also brought in.

Refer to the screenshot below.

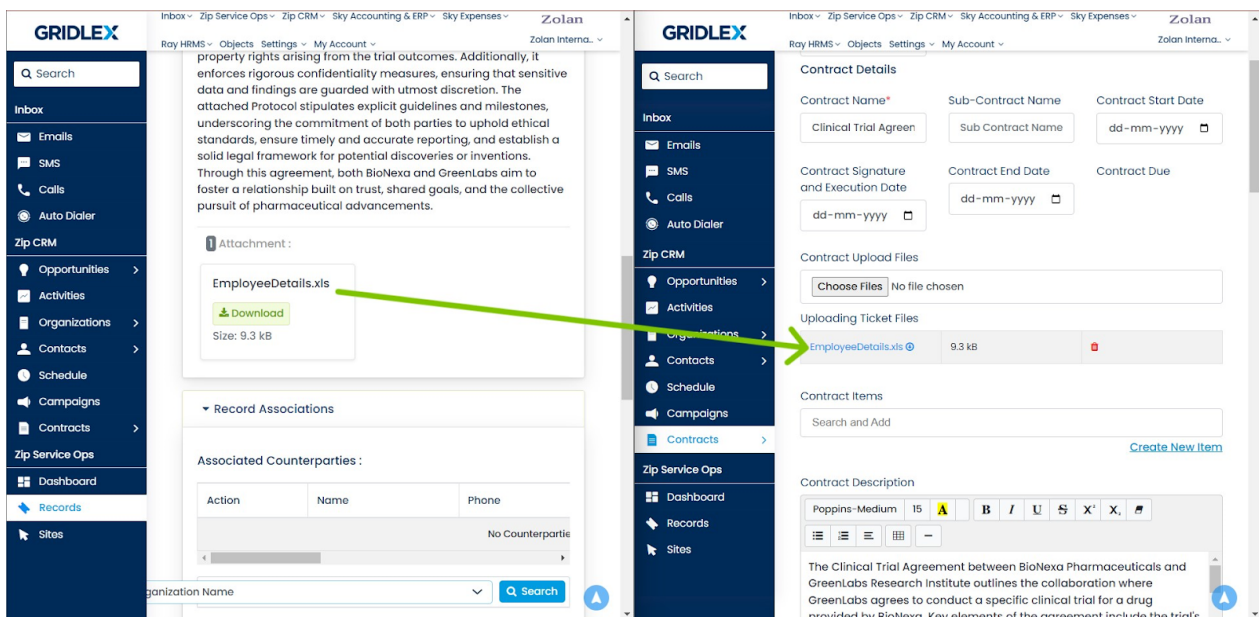
- Record Subject:



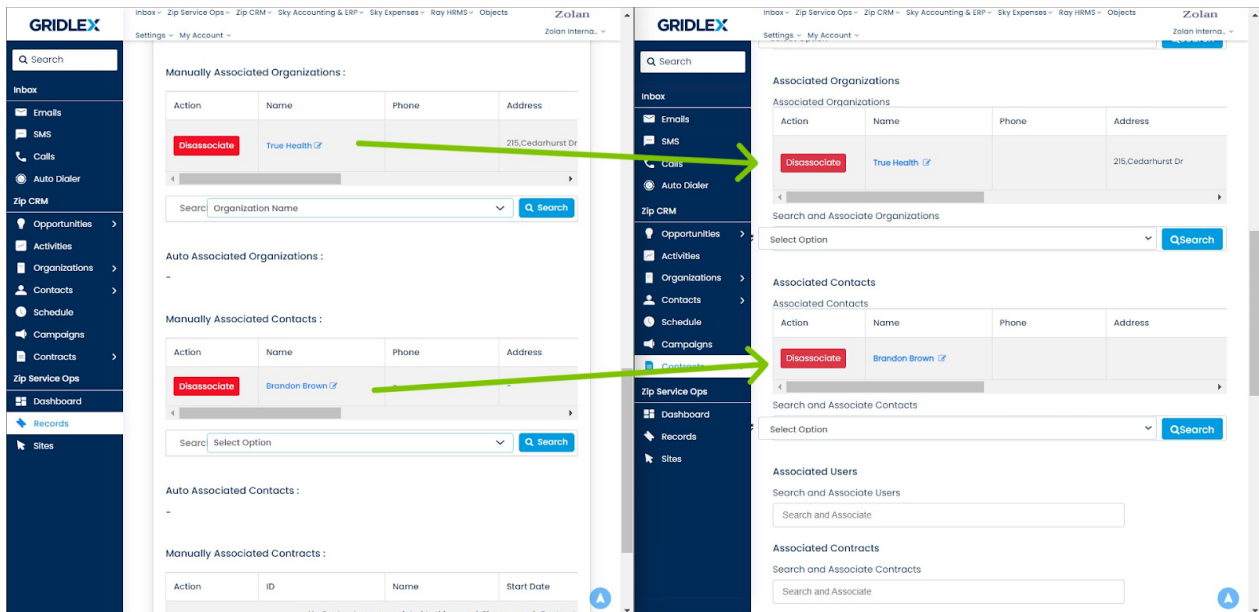
- Record Description:



• Attachments:



• Record Associations:



Note: Data from the record is directly transferred into the contract's sections when the section names in both record model and contract template match and the fields are the same.

Step 5: As you continue scrolling down, you'll come across the Section Fields. These fields, mapped to your chosen contract template, are pre-filled for your convenience.

The screenshot shows the '1. Section Name : Additional Information' section in the GRIDLEX interface. The section contains 'Standard Fields' (Department, Country) and 'Custom Fields' (Discount %, Contract Price, Contract Type). The 'Price Group' section is also visible.

1. Section Name : Additional Information			
Clear Section Fields			
Standard Fields			
Department	Country		
Real Estate	USA		
Custom Fields			
Discount %	Contract Price	Contract Type	
4%	\$2,000	Real Estate Contracts	
Contract Pricing Files			
Choose Files No file chosen			
Custom Objects			
Price Group			
Choose Instance			
2023-01-01			
Discount %	Date	Contract Type	Contract Price
4%	2023-01-01	Real Estate Contracts	\$2,000

Step 6: Fill in the details for custom fields and once done, click "Create Contract." Now your record is converted to contract.

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1. Section Name : Additional Information Clear Section Fields

Standard Fields

Department: Real Estate | Country: USA

Custom Fields

Discount %: 4% | Contract Price: \$2,000 | Contract Type: Real Estate Contracts

Contract Pricing Files: Choose Files | No file chosen

Custom Objects

Price Group

Choose Instance: 2023-01-01

Discount %	Date	Contract Type	Contract Price
2%	2023-01-01	Real Estate Contracts	\$230.00

Create Contract Cancel

Note: To learn how to create contracts in Gridlex Zip follow this guide: [How to Create Contracts in Gridlex Zip?](#)

Congratulations! You have now learned how to convert a record into a contract.

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.