

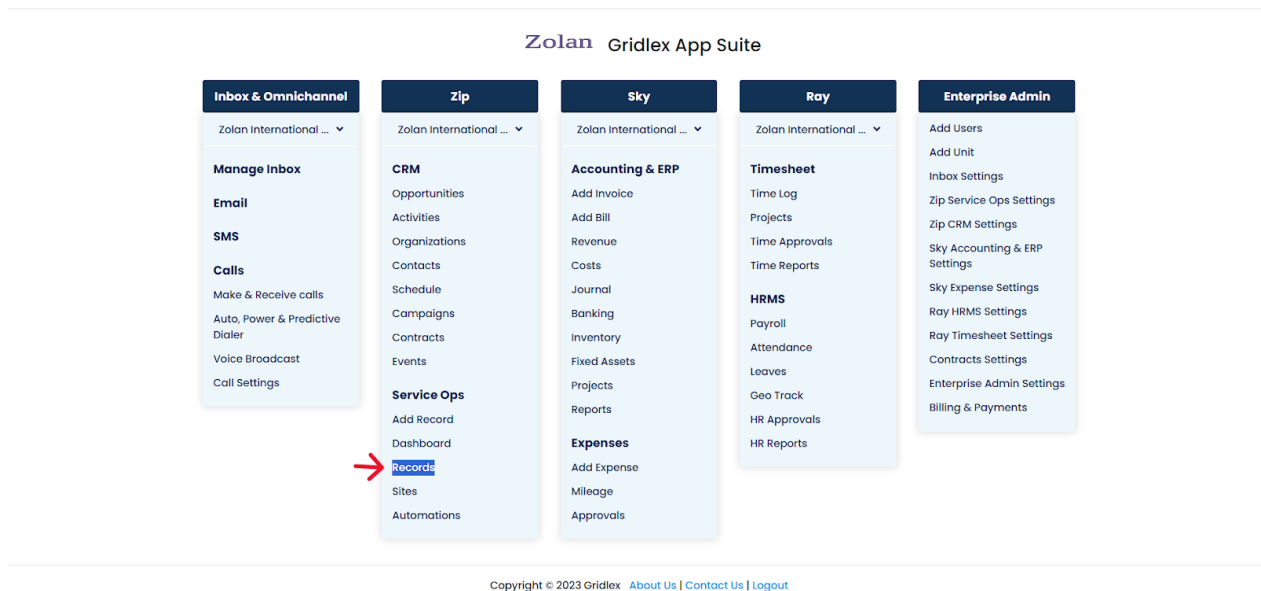
Welcome to our comprehensive guide on utilizing the listing view in Gridlex.

The Records 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 ‘Records’ under the Zip section.



**Step 2:** Click on the three-dot menu to access column settings. Clicking on it will provide a dropdown of various settings options.

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Record ID	Record Subject (Subject)	Status	Priority	Labels	Units	Assign
120533772179546112	[Ignore] testing - record with status customization and signature fields	Assigned to Support Executive	Low			Ravi
1204310655307010048	System Issues	Form Submitted	Critical	Southeast, Technical Issues	Support	Moh
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			Navy
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		

**Step 3:** From the dropdown, users can sort Records in ascending or descending order based on the selected column. This is handy when you have numerous entries and you want to quickly locate specific ones.

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Record ID	Record Subject (Subject)	Status	Priority	Labels	Units	Assign
1165905898775420928	Appointment Confirmation	Sort Ascending		Orders		
1165909382526574592	Appointment Confirmation	Sort Descending		Orders		
1165908935711563776	Appointment Confirmation	Columns		Orders		
1189798791344771072	BioPharm Innovations Collaboration Agreement	Filter		Bugs		
1189453412107497472	Clinical Trial Agreement	Set Column Position				
1189752244775112704	Delivery Status Notification (Failure)	Form Submitted	High			
1203868156109205504	[Ignore] Test custom fields with Signature field - Oct 03 12:32 PM	Form Submitted	Critical			
120533772179546112	[Ignore] testing - record with status customization and signature fields	Assigned to Support Executive	Low			Ravi
128	Intake Form- Christina Bells	Assigned to Support Executive				
126	Intake Form- John Doe	Invalid Form Details	Normal	Southwest		
127	Intake Form- Robert Shore	Valid Insurance	High	Southeast		
		Invalid Form Details	Critical	Southwest		

## Advanced Features Overview:

### 1. Managing Columns

In the 'Columns' dropdown, you'll notice checkboxes. Checking these boxes determines which columns are displayed on the page. Once you've made

your selection, click the 'Apply' button to update the listing view. The view will reflect your choices.

**Note: If you want to revert to the original settings, there's a 'Reset' button. Click it, and all customizations will be reverted. Remember, if you've already applied changes and want to undo a few, you'll need to manually deselect columns.**

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Record ID	Record Subject (Subject)	Status	Priority	Labels	Units	Assign
1165905898775420928	Appointment Confirmation	Sort Ascending		Orders		
1165909382526574592	Appointment Confirmation	Sort Descending		Orders		
1165908935711563776	Appointment Confirmation	Columns		Orders		
1189798791344771072	BioPharm Innovations Collaboration Agreement	Search for Columns		Orders		
1189453412107497472	Clinical Trial Agreement	RECORD NATIVE FIELDS		Bugs		
1189752244775112704	Delivery Status Notification (Failure)	<input checked="" type="checkbox"/> Record ID				
1203868156109205504	[Ignore] Test custom fields with Signature field - Oct 03 12:32 PM	<input checked="" type="checkbox"/> Record Subject (Subject)				
1205333772179546112	[Ignore] testing - record with status customization and signature fields	<input checked="" type="checkbox"/> Status				
128	Intake Form- Christina Bells	Status Type				
126	Intake Form- John Doe	Reset				
127	Intake Form- Robert Shore	Apply				

Filter: [ ] | Set Column Position: [ ]

Executive: Assigned to Support Executive

Invalid Form Details: Normal, Southwest

Valid Insurance: High, Southeast

Invalid Form Details: Critical, Southwest

**Note: Want a specific column at the beginning or the end? Simply drag and drop the column to its new position.**

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Record ID	Created On	Record Subject (Subject)	Status	Priority	Labels
1165905898775420928	Jun 20 2023, 12:58 PM	Appointment Confirmation		Normal	Orders
1165909382526574592	Jun 20 2023, 1:12 PM	Appointment Confirmation		Normal	Orders
1165908935711563776	Jun 20 2023, 1:10 PM	Appointment Confirmation		Normal	Orders
1189798791344771072	Aug 25 2023, 11:20 AM	BioPharm innovations Collaboration Agreement	Form Submitted	High	Bugs
1189453412107497472	Aug 24 2023, 12:28 PM	Clinical Trial Agreement	Initial Inquiry	Critical	
1189752244775112704	Aug 25 2023, 8:15 AM	Delivery Status Notification (Failure)	Form Submitted		
1203868156109205504	Oct 03 2023, 7:07 AM	[Ignore] Test custom fields with Signature field - Oct 03 12:32 PM	Assigned to Support Executive		
1205333772179546112	Oct 07 2023, 8:11 AM	[Ignore] testing - record with status customization and signature fields	Assigned to Support Executive	Low	
128	May 16 2022, 6:05 PM	Intake Form- Christina Bells	Invalid Form Details	Normal	Southwest
126	May 16 2022, 6:02 PM	Intake Form- John Doe	Valid Insurance	High	Southeast
127	May 16 2022, 6:03 PM	Intake Form- Robert Shore	Invalid Form Details	Critical	Southwest

## 2. Using the Filter Feature

The filter is a powerful tool to streamline your displayed data. Whether you have a keyword, date, or specific criterion, the filter will help you narrow down the list. For example, let's say you're interested in a Record with the subject "Clinical Trial Agreement," enter this keyword in the "Record Subject (Subject)" filter section. Next, specify whether the keyword should match all criteria (AND) or any of the criteria (OR). After setting your conditions, click on the 'Filter' button.

The screenshot displays the GRIDLEX application 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, Contracts, Events, Zip Service Ops, Dashboard, Records, and Sites. The main area shows a table of records. A dropdown menu is open over the 'Record Subject (Subject)' column, showing options for sorting (Ascending, Descending) and filtering. The 'Filter' button is highlighted with a red arrow. The table data includes records with IDs, creation dates, subjects, and status/priority labels.

Record ID	Created On	Record Subject (Subject)	Status	Priority	Labels
1165905898775420928	Jun 20 2023, 12:58 PM	Appointment Confirmation			Orders
1165908382526574592	Jun 20 2023, 1:12 PM	Appointment Confirmation			Orders
1165908935711563776	Jun 20 2023, 1:10 PM	Appointment Confirmation			Orders
1189798791344771072	Aug 25 2023, 11:20 AM	BioPharm innovations Collaboration Agreement			Bugs
1189453412107497472	Aug 24 2023, 12:28 PM	Clinical Trial Agreement			
1189752244775112704	Aug 25 2023, 8:15 AM	Delivery Status Notification (Failure)			
1203868156109205504	Oct 03 2023, 7:07 AM	[ignore] Test custom fields with Signature field - Oct 03 12:32 PM			
1205333772179546112	Oct 07 2023, 8:11 AM	[ignore] testing - record with status customization and signature fields			
128	May 16 2022, 6:05 PM	Intake Form- Christina Bells	Invalid Form Details	Normal	Southwest
126	May 16 2022, 6:02 PM	Intake Form- John Doe	Valid Insurance	High	Southeast
127	May 16 2022, 6:03 PM	Intake Form- Robert Shore	Invalid Form Details	Critical	Southwest

**Note: For a fresh start, you can wipe all the set filters with the 'Clear Filters' option.**

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Record ID	Created On	Record Subject (Subject)	Status	Priority	Labels
1189453412107497472	Aug 24 2023, 12:28 PM	Clinical Trial Agreement	Initial Inquiry	Critical	

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1 - 1 of 1 Items

### 3. Column Positioning

Some columns are crucial and need to be constantly visible. To achieve this, use the 'Stick Column' function. For instance, if you want 'Created On' and 'Priority' to be perpetually visible, even while scrolling, stick these columns. Feel like changing which columns are stuck? Use the 'Unstick Column' option to revert them back to their scrollable state.

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Created On	Priority	Record ID	Record Subject (Subject)	Status	Labels
Oct 07 2023, 8:11 AM		33772179546112	[ignore] testing - record with status customization and signature fields	Assigned to Support Executive	
Oct 04 2023, 12:25 PM		0655307010048	System Issues	Form Submitted	Southeast, Technical Issues
Oct 03 2023, 7:07 AM		38156109205504	[ignore] Test custom fields with Signature field - Oct 03 12:32 PM	Assigned to Support Executive	
Aug 31 2023, 5:43 AM	Low	ITAUG-31-23123	[Test][ignore] This is a test ticket.	Internal Review	Support
Aug 30 2023, 7:22 AM	Critical	1191550729023336448	Urgent - System Issues - John (Employee ID: J1235)	Form Submitted	
Aug 25 2023, 11:20 AM	High	1189798791344771072	BioPharm Innovations Collaboration Agreement	Form Submitted	Bugs
Aug 25 2023, 10:27 AM		1189785507820425216	Re: Reschedule Request - Anti-infective therapy sessions.	Form Submitted	
Aug 25 2023, 8:15 AM		1189752244775112704	Delivery Status Notification (Failure)	Form Submitted	
Aug 24 2023, 12:28 PM	Critical	1189453412107497472	Clinical Trial Agreement	Initial Inquiry	
Aug 24 2023, 8:53 AM	High	1189399286401159168	Urgent: System Issues	Initial Inquiry	Bugs
Aug 24 2023, 8:51 AM		1189398883861221376	Testing 2	Initial Inquiry	

### 4. Exporting to Excel

If you need your data offline or in a spreadsheet format for further analysis, the ‘Export to Excel’ feature is your friend. Click the ‘Export to Excel’ option. A spreadsheet will be automatically generated and downloaded, mirroring your current listing view, including filters, column choices, and positions.

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Created On	Priority	Record ID	Record Subject (Subject)	Status	Labels
Oct 07 2023, 8:11 AM	Low	1205333772179546112	[Ignore] testing - record with status customization and signature fields	Assigned to Support Executive	
Oct 04 2023, 12:25 PM	Critical	1204310655307010048	System Issues	Form Submitted	Southeast, Technical Issues
Oct 03 2023, 7:07 AM		1203868156109205504	[Ignore] Test custom fields with Signature field - Oct 03 12:32 PM	Assigned to Support Executive	
Aug 31 2023, 5:43 AM	Low	ITAUG-31-23123	[Test][Ignore] This is a test ticket.	Internal Review	Support
Aug 30 2023, 7:22 AM	Critical	1191550729023336448	Urgent - System Issues - John (Employee ID: J1235)	Form Submitted	
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Aug 24 2023, 12:28 PM	Critical	1189453412107497472	Clinical Trial Agreement	Initial Inquiry	
Aug 24 2023, 8:53 AM	High	1189399286401159168	Urgent: System Issues	Initial Inquiry	Bugs
Aug 24 2023, 8:51 AM		1189398883861221376	Testing 2	Initial Inquiry	

Additional Features in the Listing View:

1. Column Resizing

Want to see more data within a column or less? You can manually adjust a column’s width. Hover over a column's border until your cursor changes, then click and drag to your preferred size.

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Created On	Priority	Record ID	Record Subject (Subject)	Status	Labels
Oct 07 2023, 8:11 AM	Low	1205333772179546112	[Ignore] testing - record with status customization and signature fields	Assigned to Support Executive	
Oct 04 2023, 12:25 PM	Critical	1204310655307010048	System Issues	Form Submitted	Southeast, Technical Issues
Oct 03 2023, 7:07 AM		1203868156109205504	[Ignore] Test custom fields with Signature field - Oct 03 12:32 PM	Assigned to Support Executive	
Aug 31 2023, 5:43 AM	Low	ITAug-31-23123	[Test][Ignore] This is a test ticket.	Internal Review	Support
Aug 30 2023, 7:22 AM	Critical	1191550729023336448	Urgent - System issues - John (Employee ID: J1235)	Form Submitted	
Aug 25 2023, 11:20 AM	High	1189798791344771072	BioPharm Innovations Collaboration Agreement	Form Submitted	Bugs
Aug 25 2023, 10:27 AM		1189785507820425216	Re: ReSchedule Request - Anti-infective therapy sessions.	Form Submitted	
Aug 25 2023, 8:15 AM		1189752244775112704	Delivery Status Notification (Failure)	Form Submitted	
Aug 24 2023, 12:28 PM	Critical	1189453412107497472	Clinical Trial Agreement	Initial Inquiry	
Aug 24 2023, 8:53 AM	High	1189399286401159168	Urgent: System Issues	Initial Inquiry	Bugs
Aug 24 2023, 8:51 AM		1189398883861221376	Testing 2	Initial Inquiry	

## 2. Saving Personalized Views

If you've set up the listing view in a way that suits your workflow, you can save it. Click 'Save View.'

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Record ID	Record Subject (Subject)	Status	Priority	Labels	Units	Assig
1205333772179546112	[Ignore] testing - record with status customization and signature fields	Assigned to Support Executive	Low			Ravi
1204310655307010048	System issues	Form Submitted	Critical	Southeast, Technical Issues	Support	Mohc
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			Navy
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		

To ensure it remains as the default view to you, select 'Set as Default' and then hit 'Save.'

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- Campaigns
- Contracts
- Events

**Zip Service Ops**

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- Sites

**Save View**

Top Priority

☒ Set as Default

Save

Record ID	Record Subject (Subject)	Priority	Labels	Units	Assigne
1205333772179546112	[ignore] testing - rec	Low			Ravi Tej
1204310655307010048	System Issues	Critical	Southeast, Technical Issues	Support	Moham
1203868156109205504	[ignore] Test custom fields with Signature field - Oct 03 12:32 PM	Assigned to Support Executive			
11Aug-31-23123	[Test][ignore] This is a test ticket.	Internal Review	Low	Support	
1191550729023336448	Urgent - System Issues - John (Employee ID: J1235)	Form Submitted	Critical		Navya
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			
118945341207497472	Clinical Trial Agreement	Initial Inquiry	Critical		
1189399286401159168	Urgent: System Issues	Initial Inquiry	High	Bugs	
1189398883861221376	Testing 2	Initial Inquiry			

Congratulations! You have learned how to utilize the Records listing page 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](mailto: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.