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.

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

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

GRIDLEX	Inbox 🗸 Zip Service Ops 🗸	Zip CRM ~ Sky Accounting & ERP ~ Sky Expenses ~ Ray HRMS ~ Objects	Settings - My Acco	ount ~			Zolan Zolan Intern
<b>Q</b> Search	List of Saved Views	Save View Clear Filters				Export to E	xcel Add Nev
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🗠 Emails			Assigned to				
💴 SMS	1205333772179546112	[ignore] testing - record with status customization and signature fields	Support Executive	Low			Ravi
<ul> <li>Calls</li> <li>Auto Dialer</li> </ul>	1204310655307010048	System Issues	Form Submitted	Critical	Southeast, Technical Issuses	Support	Moh
Zip CRM    Opportunities	1203868156109205504	[ignore] Test custom fields with Signature field - Oct 03 12:32 PM	Assigned to Support Executive				
<ul> <li>Activities</li> <li>Organizations &gt;</li> </ul>	ITAug-31-23123	[Test][Ignore] This is a test ticket.	Internal Review	Low	Support		
Contacts > Schedule	1191550729023336448	Urgent - System issues - John (Employee ID: J1235)	Form Submitted	Critical			Nav
Campaigns	1189798791344771072	BioPharm Innovations Collaboration Agreement		High	Bugs		
Contracts >	1189785507820425216	Re: ReSchedule Request - Anti-infective therapy sessions.					
Zip Service Ops	1189752244775112704	Delivery Status Notification (Failure)					
<ul> <li>Dashboard</li> <li>Records</li> </ul>	1189453412107497472	Clinical Trial Agreement	Initial Inquiry	Critical			
Sites	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.

Search	List of Saved Views	Save View Clear Filters				Export to Excel	Add New
box	Record ID :	Record Subject (Subject) ↑	: Status :	Priority :	Labels	Units	Assiç
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Opportunities >	1189798791344771072	BioPharm Innovations Collaboration Agreement		High	Bugs		
Activities Organizations	1189453412107497472	Clinical Trial Agreement	Initial Inquiry	Critical			
Contacts >	1189752244775112704	Delivery Status Notification (Failure)	Form Submitted				
Schedule Campaigns Contracts >	1203868156109205504	[ignore] Test custom fields with Signature field - Oct 03 12:32 PM	Assigned to Support Executive				
Events Service Ops	1205333772179546112	[ignore] testing - record with status customization and signature fields	Assigned to Support Executive	Low			Ravi
Dashboard	128	Intake Form- Christina Bells	Invalid Form Details	Normal	Southwest		
Records	126	Intake Form- John Doe	Valid Insurance	High	Southeast		

#### **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.

GRIDLEX	Inbox ~ Zip Service Ops ~	Zip CRM $\sim$ Sky Accounting & ERP $\sim$ Sky Expenses $\sim$ Ray HRMS $\sim$ Obj	iects Settings - My Account -	Zolar Zolan Interr
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vodr	Record ID :	Record Subject (Subject) ↑	: Status : Priority : Labels	: Units : Assi
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Activities Organizations	1189453412107497472	Clinical Trial Agreement	Status Il	
Contacts >	1189752244775112704	Delivery Status Notification (Failure)	Reset Apply ←	
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Contracts > Events Service Ops	1205333772179546112	[ignore] testing - record with status customization and signature fields	Assigned to Support Low Executive	Rav
Dashboard	128	Intake Form- Christina Bells	Invalid Form Details Normal Southwest	
Records	126	Intake Form- John Doe	Valid Insurance High Southeast	
Sites	127	Intake Form- Robert Shore	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.

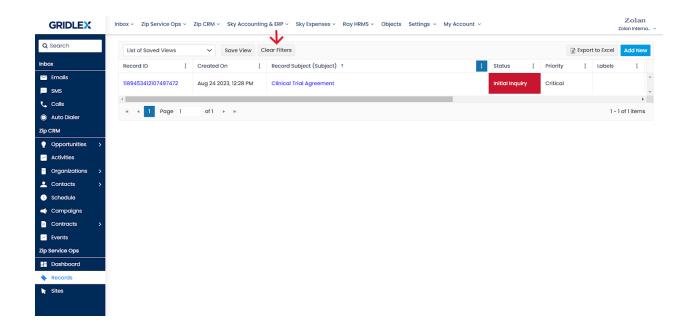
1										
<b>Q</b> Search	List of Saved Views	Save View Cl	lear Filters	Export to Excel Add						
box	Record ID :	Created On :	Record Subject (Subject) †	Status :	Priority :	Labels				
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SMS										
Calls	1165909382526574592	Jun 20 2023, 1:12 PM	Appointment Confirmation		Normal	Orders				
Auto Dialer	1165908935711563776	Jun 20 2023, 1:10 PM	Appointment Confirmation		Normal	Orders				
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Opportunities >	1189798791344771072	Aug 25 2023, 11:20 AM	BioPharm Innovations Collaboration Agreement		High	Bugs				
Activities	1189453412107497472	Aug 24 2023, 12:28 PM	Clinical Trial Agreement	Initial Inquiry	Critical					
Organizations >	1103433412107437472	Aug 24 2023, 12.28 PM		initial inquiry	Childar					
Contacts >	1189752244775112704	Aug 25 2023, 8:15 AM	Delivery Status Notification (Failure)							
Schedule				Assigned to						
Campaigns	1203868156109205504	Oct 03 2023, 7:07 AM	[ignore] Test custom fields with Signature field - Oct 03 12:32 PM	Support Executive						
Contracts >				Assigned to						
<ul> <li>Events</li> </ul>	1205333772179546112	Oct 07 2023, 8:11 AM	[ignore] testing - record with status customization and signature fields	Support Executive	Low					
p Service Ops				Invalid Form						
Dashboard	128	May 16 2022, 6:05 PM	Intake Form- Christina Bells	Details	Normal	Southwest				
Records	126	May 16 2022, 6:02 PM	Intake Form- John Doe	Valid Insurance	High	Southeast				
Sites	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.

Q Search	List of Saved Views	✓ Save View	Clear Filters		Export t	to Excel Add Ne
nbox	Record ID	Created On	: Record Subject (Subject) †	: Status : Prior	ity :	Labels
🗠 Emails	1165905898775420928	Jun 20 2023, 12:58 PM	Appointment Confirmation	† Sort Ascending	ы	Orders
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ip CRM	1165908935711563776	Jun 20 2023, 1:10 PM	Appointment Confirmation	Equal to 👻	al	Orders
Opportunities >	1189798791344771072	Aug 25 2023, 11:20 AM	BioPharm Innovations Collaboration Agreement	Clinical Trial Agreement		Bugs
~ Activities				And Or		
Organizations >	1189453412107497472	Aug 24 2023, 12:28 PM	Clinical Trial Agreement	Equal to 🔻	1	
Contacts >	1189752244775112704	Aug 25 2023, 8:15 AM	Delivery Status Notification (Failure)			
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Campaigns	1203868156109205504	Oct 03 2023, 7:07 AM	[ignore] Test custom fields with Signature field - Oct 03 12:32 PM	Set Column Position  V		
Contracts				Executive		
~ Events	1205333772179546112	Oct 07 2023, 8:11 AM	[ignore] testing - record with status customization and signature fields	Assigned to Support Low		
tip Service Ops				Executive		
Dashboard	128	May 16 2022, 6:05 PM	Intake Form- Christina Bells	Invalid Form Details	nal	Southwest
Records	126	May 16 2022, 6:02 PM	Intake Form- John Doe	Valid Insurance High		Southeast
Sites	127	May 16 2022, 6:03 PM	Intake Form- Robert Shore	Invalid Form		Southwest

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



## **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.

GRIDLEX	nbox ~ Zip Service Ops	✓ Zip CRM ✓ Sky	y Accounting & ERP ~ Sky Exp	enses -> Ray HRMS -> Objects Settings -> My Account ->			Zolan Zolan Interno
<b>Q</b> Search	List of Saved Views	∽ Sav	ve View Clear Filters			Export to	Excel Add New
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Contacts >	Aug 30 2023, 7:22 AM	Critical	1191550729023336448	Urgent - System issues - John (Employee ID: J1235)		orm Submitted	
Schedule	Aug 25 2023, 11:20 AM	High	1189798791344771072	BioPharm Innovations Collaboration Agreement			Bugs
Contracts >	Aug 25 2023, 10:27 AM		1189785507820425216	Re: ReSchedule Request - Anti-infective therapy sessions.			
Events	Aug 25 2023, 8:15 AM		1189752244775112704	Delivery Status Notification (Failure)			
Dashboard	Aug 24 2023, 12:28 PM	Critical	1189453412107497472	Clinical Trial Agreement		nitial Inquiry	
Records Sites	Aug 24 2023, 8:53 AM	High	1189399286401159168	Urgent: System Issues		nitial Inquiry	Bugs
	Aug 24 2023, 8:51 AM		1189398883861221376	Testing 2		nitial 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.

Q Search	List of Saved Views	✓ Save	View Clear Filters			Export to	D Excel Add New
box	Created On :	Priority :	Record ID :	Record Subject (Subject)	:	Status :	Labels :
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Auto Dialer	Oct 04 2023, 12:25 PM	Critical	1204310655307010048	System Issues			Technical Issuses
p CRM						Assigned to	
Opportunities >	Oct 03 2023, 7:07 AM		1203868156109205504	[ignore] Test custom fields with Signature field - Oct 03 12:32 PM		Support Executive	
<ul> <li>Activities</li> <li>Organizations &gt;</li> </ul>	Aug 31 2023, 5:43 AM	Low	ITAug-31-23123	[Test][Ignore] This is a test ticket.		Internal Review	Support
Contacts >	Aug 30 2023, 7:22 AM	Critical	1191550729023336448	Urgent - System issues - John (Employee ID: J1235)		Form Submitted	
Schedule							
Campaigns	Aug 25 2023, 11:20 AM	High	1189798791344771072	BioPharm Innovations Collaboration Agreement			Bugs
Contracts >	Aug 25 2023, 10:27 AM		1189785507820425216	Re: ReSchedule Request - Anti-infective therapy sessions.			
Events							
p Service Ops	Aug 25 2023, 8:15 AM		1189752244775112704	Delivery Status Notification (Failure)			
Dashboard	Aug 24 2023, 12:28 PM	Critical	1189453412107497472	Clinical Trial Agreement		Initial Inquiry	
Records Sites	Aug 24 2023, 8:53 AM	High	1189399286401159168	Urgent: System issues	_	Initial Inquiry	Bugs

## 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.

GRIDLEX	Inbox ~ Zip Service Ops ~	Zip CRM ~ Sky Ac	counting & ERP ~ Sky Expe	nses - Ray HRMS - Objects Settings - My Account -			Zo] Zolan In
<b>)</b> Search	List of Saved Views	✓ Save Vi	ew Clear Filters			Export to	Excel Add
nbox	Created On	Priority :	Record ID	Record Subject (Subject)	:	Status :	Labels
<ul><li>Emails</li><li>SMS</li></ul>	Oct 07 2023, 8:11 AM	Low	1205333772179546112	[ignore] testing - record with status customization and signature fields		Assigned to Support Executive	
Calls	Oct 04 2023, 12:25 PM	Critical	1204310655307010048	System Issues		Form Submitted	Southeast, Technical Issuses
Opportunities >	Oct 03 2023, 7:07 AM		1203868156109205504	[Ignore] Test custom fields with Signature field - Oct 03 12:32 PM		Assigned to Support Executive	
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Contacts >	Aug 30 2023, 7:22 AM	Critical	1191550729023336448	Urgent - System issues - John (Employee ID: J1235)			
Campaigns	Aug 25 2023, 11:20 AM	High	1189798791344771072	BioPharm Innovations Collaboration Agreement			Bugs
Contracts >	Aug 25 2023, 10:27 AM		1189785507820425216	Re: ReSchedule Request - Anti-infective therapy sessions.			
p Service Ops	Aug 25 2023, 8:15 AM		1189752244775112704	Delivery Status Notification (Failure)			
Dashboard Records	Aug 24 2023, 12:28 PM	Critical	1189453412107497472	Clinical Trial Agreement		Initial Inquiry	
Sites	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.'

GRIDLEX	Inbox - Zip Service Ops -	Zip CRM ~ Sky Accounting & ERP ~ Sky Expenses ~ Ray HRMS ~ Object	cts Se	ettings ~ My Acco	ount ~						Colan n Interno
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ip CRM Opportunities >	1203868156109205504	[ignore] Test custom fields with Signature field - Oct 03 12:32 PM		Assigned to Support Executive							
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Contacts >	1191550729023336448	Urgent - System issues - John (Employee ID: J1235)		Form Submitted	Critical						Nav
Campaigns	1189798791344771072	BioPharm Innovations Collaboration Agreement			High		Bugs				
Contracts >	1189785507820425216	Re: ReSchedule Request - Anti-infective therapy sessions.									
o Service Ops	1189752244775112704	Delivery Status Notification (Failure)									
Dashboard Records	1189453412107497472	Clinical Trial Agreement		Initial Inquiry	Critical						
Sites	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.'

GRIDLEX	Ir	nbox ~ Zip Service Ops ~	Zip CRM ~ Sky Accou	nting & FRP × Sky Expenses × Ray HRMS × Object		Му Ассо	unt v			Zolan Zolan Interna
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Organizations >		ITAug-31-23123	[Test][Ignore] This is a	a test ticket.	Internal I	Review	Low	Support		
Contacts		1191550729023336448	Urgent - System issue	is - John (Employee ID: J1235)	Form Sul	omitted	Critical			Νανγα
<ul> <li>Schedule</li> <li>Campaigns</li> </ul>		1189798791344771072	BioPharm Innovations	Collaboration Agreement			High	Bugs		
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		1189398883861221376	Testing 2		Initial Inc	quiry				

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 <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.