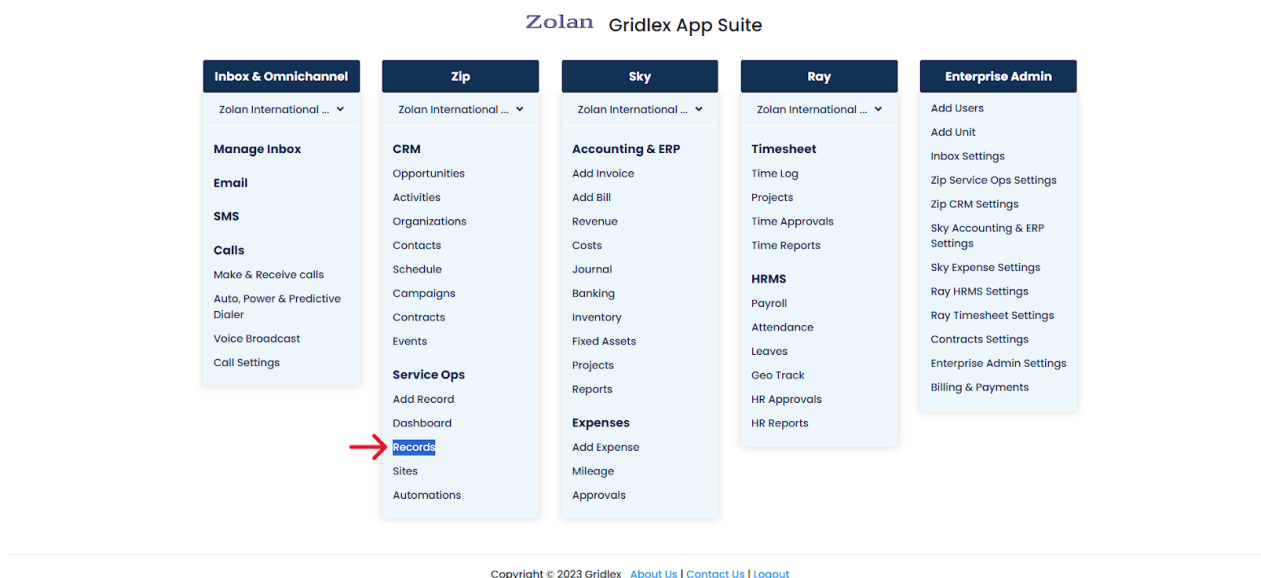


Once a record is created, multiple conversations may ensue, such as updates on record status, requests for additional information, or other relevant discussions. So, how can you effectively monitor these communications? The email communications feature in records allows you to seamlessly manage and view all associated email interactions for a specific record. Refer to this guide to learn how to manage your email communications within records on the Gridlex platform.

Step 1: Log in to your Gridlex App Suite account and click on the "Records" option under the Zip tab.



Step 2: Click on the Record ID or Record Subject of the record you want to view communications for.

GRIDLEX

Inbox

Zip Service Ops

Zip CRM

Sky Accounting & ERP

Sky Expenses

Ray HRMS

Objects

Settings

My Account

Zolan

Zolan Internat...

Search

Inbox

Emails

SMS

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Auto Dialer

Zip CRM

Opportunities

Activities

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Contacts

Schedule

Campaigns

Contracts

Events

Zip Service Ops

Dashboard

Records

Sites

List of Saved Views

Save View

Clear Filters

Export to Excel

Add New

Record ID	Record Subject (Subject)	Status	Priority	Labels	Units	Assign
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				
118975224477512704	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				
1189396927956602880	Testing 1	Form Submitted				
1189087660854693888	One plus - Distribution	Competitor			Super Admin, Zio Helodesk	Navy

Step 3: Click on the “Communication” tab to view the previous email communications for this record.

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Schedule

Campaigns

Contracts

Events

Zip Service Ops

Dashboard

Records

Sites

Urgent - System Issues - John (Employee ID: J1235)

Channel: - Workflow: Tech Support Status: Form Submitted Priority: Critical Model: IT Support Created on: Aug. 30, 2023, 3:22 a.m. EDT SLA Name: -

Communication

Comments and Notes

Information

History

Files

Delete Record

Edit

Collapse all

Record Standard Information

Record ID

Model

Workflow

1191550729023336448

IT Support

Tech Support

Status

Channel

Priority

Form Submitted

-

Critical

Labels

Assign Units

Assign User

-

-

Navya Deepika Battu

Record Description

Hi,

We received a new issue regarding system operations.

The user reports system is working slowly. No error messages were provided. Needs immediate attention.

Step 4: Click on the email thread you want to view.

GRIDLEX | Inbox | Zip Service Ops | Zip CRM | Sky Accounting & ERP | Sky Expenses | Ray HRMS | Objects | Settings | My Account | Zolan | Change entity

Urgent - System Issues - John (Employee ID: J1235)

Channel: - | Workflow: Tech Support | Status: Form Submitted | Priority: Critical | Model: IT Support | Created on: Aug. 30, 2023, 3:22 a.m. EDT | SLA Name: -

Communication | Comments and Notes | Information | History | Files | [Delete Record](#)

From: brandonxbrown1989@gmail.com To: navya@gridlex.com	Urgent - System issues - John (Employee ID: J1235) Hi, We requested additional information. Will get back to you when we have an update. Thanks, Zolan Support	Zolan Marketing Thu Aug 31 2023
From: support@zolan.gridlexmail.com To: navya@gridlex.com	Urgent - System issues - John (Employee ID: J1235) Hi Navya, What is the update on this ticket? Thanks, Zolan Support	support@zolan.com Wed Aug 30 2023
From: navya@gridlex.com To: support@zolan.gridlexmail.com	Re: Urgent - System issues - John (Employee ID: J1235) Hi, I am working on it and will update you soon. Thanks, Navya On Wed, Aug 30, 2023 at 12:52 PM Zolan Support <support@zola...	support@zolan.com Wed Aug 30 2023

Step 5: Now, you can view the communication of your selected email thread. You can reply to or forward the email by clicking on “Reply” and “Reply all” or “Forward.”

Note: Whenever you want to view email communications, you can come to this tab and access them.

GRIDLEX | Inbox | Zip Service Ops | Zip CRM | Sky Accounting & ERP | Sky Expenses | Ray HRMS | Objects | Settings | My Account | Zolan | Change entity

Communication | Comments and Notes | Information | History | Files | [Delete Record](#)

From: brandonxbrown1989@gmail.com To: navya@gridlex.com	Urgent - System issues - John (Employee ID: J1235) Hi, We requested additional information. Will get back to you when we have an update. Thanks, Zolan Support	Zolan Marketing Thu Aug 31 2023
From: support@zolan.gridlexmail.com To: navya@gridlex.com	Urgent - System issues - John (Employee ID: J1235) Hi Navya, What is the update on this ticket? Thanks, Zolan Support	support@zolan.com Wed Aug 30 2023

Urgent - System Issues - John (Employee ID: J1235) [SENT](#) [Go to Email Thread](#)

From: Zolan Support
to: Navya Deepika Battu

Hi Navya,

What is the update on this ticket?

Thanks,
Zolan Support

[Reply](#) [Reply all](#) [Forward](#)

Step 6: If you want to start a new conversation, hover over the “Communication” tab and click “New Conversation” to create a new email thread.

GRIDLEX

Inbox
Zip Service Ops
Zip CRM
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Sky Expenses
Ray HRMS
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Urgent - System Issues - John (Employee ID: J1235)

Channel: - Workflow: Tech Support Status: Form Submitted Priority: Critical Model: IT Support Created on: Aug. 30, 2023, 3:22 a.m. EDT SLA Name: -

Communication

Comments and Notes
Information
History
Files

Delete Record

From: support@zolan.gridlexmail.com To: nihai@gridlex.com	Urgent - System issues - John (Employee ID: J1235) Hi, We received a new issue regarding system operations. The user reports system is working slowly. No error messages were pro...	support@zolan.com Tue Oct 17 2023
From: brandontbrown1989@gmail.com To: navya@gridlex.com	Urgent - System issues - John (Employee ID: J1235) Hi, We requested additional information. Will get back to you when we have an update. Thanks, Zolan Support	Zolan Marketing Thu Aug 31 2023
From: support@zolan.gridlexmail.com To: navya@gridlex.com	Urgent - System issues - John (Employee ID: J1235) Hi Navya, What is the update on this ticket? Thanks, Zolan Support	support@zolan.com Wed Aug 30 2023
From: navya@gridlex.com To: support@zolan.gridlexmail.com	Re: Urgent - System issues - John (Employee ID: J1235) Hi, I am working on it and will update you soon. Thanks, Navya On Wed, Aug 30, 2023 at 12:52 PM Zolan Support <support@zolan...>	support@zolan.com Wed Aug 30 2023

Congratulations! You have learned how to utilize email communications in Records 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.