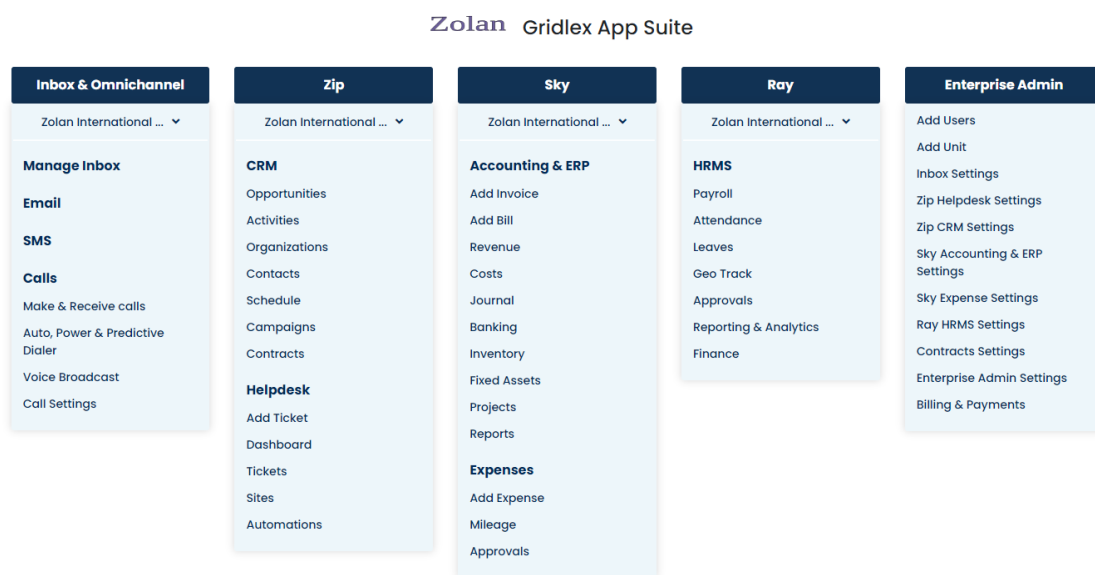


Making calls in the helpdesk system enhances customer support by allowing support teams to connect quickly with customers, gather information, and resolve issues in real-time. This results in improved communication, coordination, and customer satisfaction. Making calls from within the helpdesk reduces the need for multiple systems, simplifies the support process, and improves efficiency.

Follow the steps mentioned below to learn how to make calls in Gridlex Zip.

**Step 1:** Log in to Gridlex and click on the “Calls” tab located under the Inbox & Omnichannel section in the menu bar.



**Step 2:** In the Calls tab, you'll see a list of available inboxes and phone connections. Choose the appropriate inbox and phone connection you wish to use for making the call. Choose the country and type the number you want to dial. Once you are done typing the number, you should see a call icon or a button to start the call. Click on it to initiate the call using Gridlex Zip.

The screenshot shows the Gridlex Zip web application interface. On the left is a dark blue sidebar with a search bar and various navigation icons. The main content area is white and features a top navigation bar with links like 'Inbox', 'Outgoing', 'Incoming', 'Make & Receive Calls' (highlighted), 'Voice Mail', 'Call Recordings', 'Call Settings', 'Auto Dialer', and 'Voice Broadcast'. Below this, there are three input fields: 'Select Inbox' with a dropdown menu showing 'Customer Support (Shared)', 'Choose Phone Connection' with a dropdown showing 'Zolan Demo (+12676808350)', and 'Phone Number' with a dropdown showing 'US (+1)' and a text input field containing '3052248890'. A green circular call icon is positioned to the right of the phone number field.

**Step 3:** During the call, Gridlex Zip provides options for viewing and adding activities, profiles, and opportunities related to the contact you are speaking with. These features help you keep track of important information and interactions during the call. For example, you can record the call outcome as an activity.

This screenshot displays the 'Activities' section within the Gridlex Zip interface for a specific contact. The contact's phone number, +13052248890, is shown at the top. The 'Activities' tab is active, revealing a form for creating a new activity. The form includes a 'Default Activity' section with the following fields: 'Activity Date' (pre-filled with 13-06-2023), 'Item' (a dropdown menu), 'Upload File' (a 'Choose File' button next to the text 'No file chosen'), and 'Activity Type' (a dropdown menu set to 'Phone Call'). Below these fields are a 'Call Status' dropdown menu and an 'Associate Opportunity' section containing an 'Opportunity Name' dropdown menu.

That's it! You have now successfully learned how to make calls using Gridlex Zip. If you encounter any issues or have further questions, don't hesitate to reach out to the Gridlex support team at [apps@gridlex.com](mailto:apps@gridlex.com) for assistance.