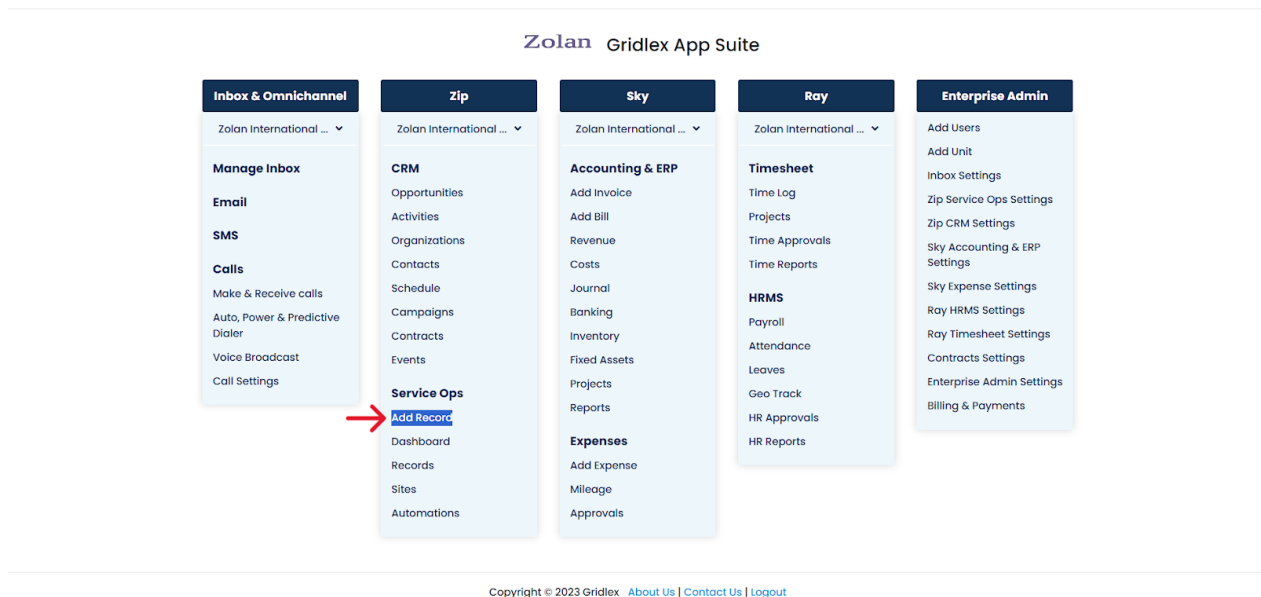


How to Add a Record in Gridlex Zip?

Follow the below steps to add a record in Gridlex Zip.

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



Step 2: Choose a model from the drop-down or create a new Model.

GRIDLEX | Inbox | Zip Service Ops | Zip CRM | Sky Accounting & ERP | Sky Expenses | Ray HRMS | Objects | Settings | My Account | **Zolan** Zolan Interna. v

Add Record

Subject:

Reference Description:

Priority: Channel:

Assian Units

Step 3: Add the Record or Email Subject and Reference Description or Email Message.

GRIDLEX | Inbox | Zip Service Ops | Zip CRM | Sky Accounting & ERP | Sky Expenses | Ray HRMS | Objects | Settings | My Account | **Zolan** Zolan Interna. v

Add Record

Choose Model: **IT Support** | Add New Model

Record or Email Subject:

Record Description or Email Message:

Status (Tech Support): Priority: Channel:

Step 4: Select the record status, priority, and label using the dropdowns.

Note: If you are creating a record on behalf of a customer, you can select the channel from which you received the customer's issue/inquiry.

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
- Calls
- Auto Dialer
- Zip CRM**
- Opportunities >
- Activities
- Organizations >
- Contacts >
- Schedule
- Campaigns
- Contracts >
- Events
- Zip Service Ops
- Dashboard
- Records
- Sites

Status (Tech Support) * Form Submitted ▾ Priority Critical ▾ Channel ▾

Labels

- Technical Issues
- Bugs
- Southwest
- Southeast**
- Orders
- Direct Orders

No User is assigned to this record. Please search User in below panel to assign with this record.

Search and Assign User Search

Associated Counterparties :

Step 5: Assign teams/units you want to work on the record by selecting them from the dropdown.

GRIDLEX Inbox ▾ Zip Service Ops ▾ Zip CRM ▾ Sky Accounting & ERP ▾ Sky Expenses ▾ Ray HRMS ▾ Objects Settings ▾ My Account ▾ Zolan Zolan Internat...

Search

Inbox

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- SMS
- Calls
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- Zip CRM**
- Opportunities >
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- Organizations >
- Contacts >
- Schedule
- Campaigns
- Contracts >
- Events
- Zip Service Ops
- Dashboard
- Records
- Sites

Status (Tech Support) * Form Submitted ▾ Priority Critical ▾ Channel ▾

Labels

- Southeast**

Assign Units

- Dua Unit – Ray
- Marketing Unit
- Super Admin
- Support**
- Zip Helpdesk Demo

Search and Assign User Search

Associated Counterparties :

Action	Name	Phone	Address	Town	State	ZipCode	Unit Name	Other Details
No Counterparties are associated to this record. Please search Counterparties in below panel to associate with this record.								

Step 6: You can also assign a user to the record. To do so, search the user's name and click "Assign."

Note: Unlike units, you can only assign a single user to a record.

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

Search: Southeast

Assign Units: Support

Assign User

Action	Name	Email	Units
No User is assigned to this record. Please search User in below panel to assign with this record.			
Navya			
Assign	Navya Deepika Battu	navya@gridlex.com	Super Admin, Marketing Unit

Associated Counterparties:

Action	Name	Phone	Address	Town	State	ZipCode	Unit Name	Other Details
No Counterparties are associated to this record. Please search Counterparties in below panel to associate with this record.								

Search and Associate Counterparties: Organization Name Search

Step 7: You can associate counterparty organizations by searching for the organization's name, ID, address, or any other details and then clicking "Associate."

Note: If the record you are creating is relevant to a contract you have with an organization, referred to as counterparty organization here, you can add them in this field.

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

Search: Navya

Assign Units: Support

Assign User

Action	Name	Email	Units
No Users found with the search keyword Navya			

Associated Counterparties:

Action	Name	Phone	Address	Town	State	ZipCode	Unit Name	Other Details
No Counterparties are associated to this record. Please search Counterparties in below panel to associate with this record.								

Search and Associate Counterparties: United Organization Name Search

Action	Name	Phone	Address	Town	State	ZipCode	Unit Name	Other Details
Associate	United Resources		7570,176th St	Mc Alpin	Florida(FL)	32062		Organization ResourcesOrg 115067554655: 7570,176th St
Associate	United Resources		7570,176th St	Mc Alpin	Florida(FL)	32062		Organization ResourcesOrg 115067554655: 7570,176th St

Manually Associated Organizations:

Step 8: Similarly, you can associate the record with any other organization by searching the organization name, ID, address, or any other details and clicking “Associate.”

The screenshot shows the GRIDLEX interface with a sidebar on the left containing navigation options like 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 content area displays the 'Manually Associated Organizations' section. At the top, there is a search bar with the text 'No Counterparties found with the search keyword United'. Below this, a table lists organizations. The first entry is 'True Health' with a green 'Associate' button next to it, highlighted by a red arrow. The table columns include Action, Name, Phone, Address, Town, State, ZipCode, Unit Name, and Other Details. The 'Other Details' column for 'True Health' shows 'Organization ID: 11506755-4920; 215, Cedarhurst'.

Step 9: You can also associate contacts from the CRM to the record by searching the contact name, ID, phone number, or any other details and clicking “Associate.”

The screenshot shows the GRIDLEX interface with the same sidebar. The main content area displays the 'Manually Associated Contacts' section. At the top, there is a search bar with the text 'No Organizations found with the search keyword True Health'. Below this, a table lists contacts. The first entry is 'John' with a green 'Associate' button next to it, highlighted by a red arrow. The table columns include Action, Name, Phone, Address, Town, State, ZipCode, Unit Name, and Other Details. The 'Other Details' column for 'John' shows 'JOHN F MOORE'. Below this, another table lists 'Associated Contracts' with columns for Action, ID, Name, Start Date, End Date, Contract Due, and Status. The 'Associated Contracts' table is currently empty, with a message 'No Contracts are associated to this record. Please search Contracts in below panel to associate with this record.'

Step 10: If this record is related to a contract, you can associate it here by searching the contract name and clicking “Associate.”

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

Search

Inbox

- Emails
- SMS
- Calls
- Auto Dialer

Zip CRM

- Opportunities
- Activities
- Organizations
- Contacts
- Schedule
- Campaigns
- Contracts
- Events
- Zip Service Ops
- Dashboard
- Records
- Sites

Associate	JOHN F MOORE	740 EAST STATE ST 740 EAST STATE ST	SHARON	PA	16146		JOHN F MOORE
Associate	Emily Johnson						Emily Johnson
Associate	John Shore					Super Admin	John Shore

Associated Contracts:

Action	ID	Name	Start Date	End Date	Contract Due	Status
No Contracts are associated to this record. Please search Contracts in below panel to associate with this record.						

Distribution

Action	ID	Name	Start Date	End Date	Contract Due	Status
Associate	1189028066803728385	Distribution Agreement				

Attachments

Add Attachments

Add Record

Step 11: If you have any attachments, upload them, then click “Add Record.”

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

Search

Inbox

- Emails
- SMS
- Calls
- Auto Dialer

Zip CRM

- Opportunities
- Activities
- Organizations
- Contacts
- Schedule
- Campaigns
- Contracts
- Events
- Zip Service Ops
- Dashboard
- Records
- Sites

Associate	Emily Johnson						Emily Johnson
Associate	John Shore					Super Admin	John Shore

Associated Contracts:

Action	ID	Name	Start Date	End Date	Contract Due	Status
No Contracts are associated to this record. Please search Contracts in below panel to associate with this record.						

Distribution

Action	ID	Name	Start Date	End Date	Contract Due	Status
Associate	1189028066803728385	Distribution Agreement				

Attachments

Add Attachments

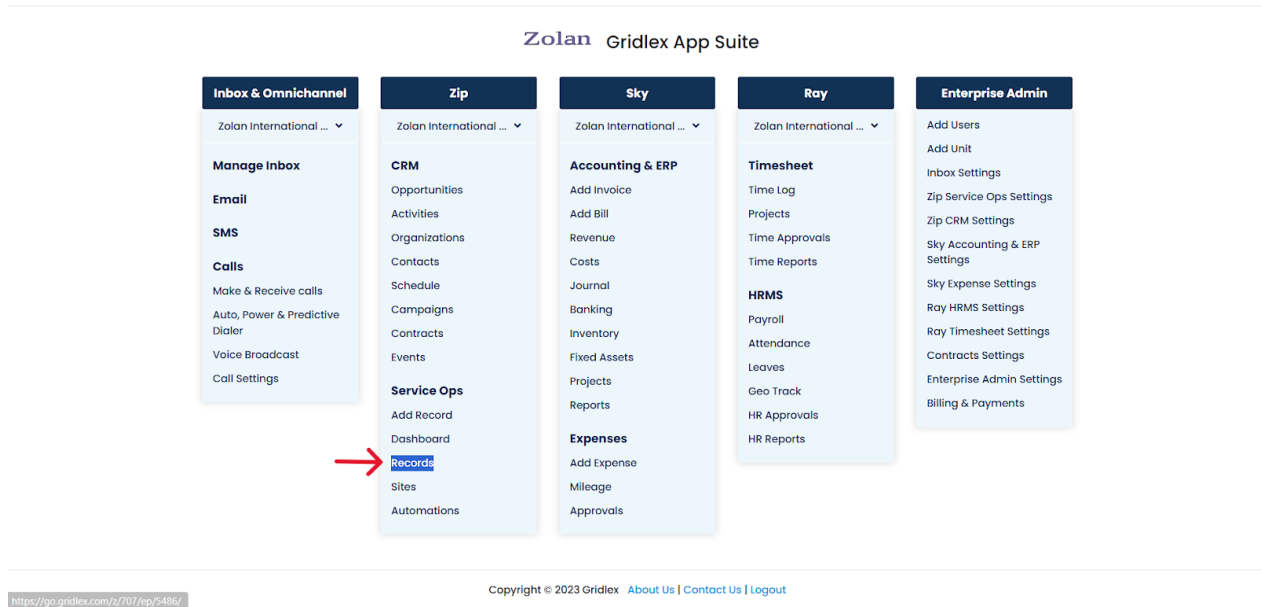
Add Record

Your record has been added, and you can view and track it under the “Records” tab.

How to Access Record Communications in Gridlex Zip?

Follow the below steps to access record communications in Gridlex Zip.

Step 1: Log in to your Gridlex App Suite account and click 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.

The screenshot shows the Gridlex interface with a list of records. A red arrow points to the record ID 1204310655307010048, which has the subject 'System Issues'.

Record ID	Record Subject (Subject)	Status	Priority	Labels	Units	Assignee
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	Mohe
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			
1189399285401159168	Urgent: System Issues	Initial Inquiry	High	Bugs		
118939888366121376	Testing 2	Initial Inquiry				

Step 3: Hover over the “Communication” tab and click “New Conversation” to start a new email thread.

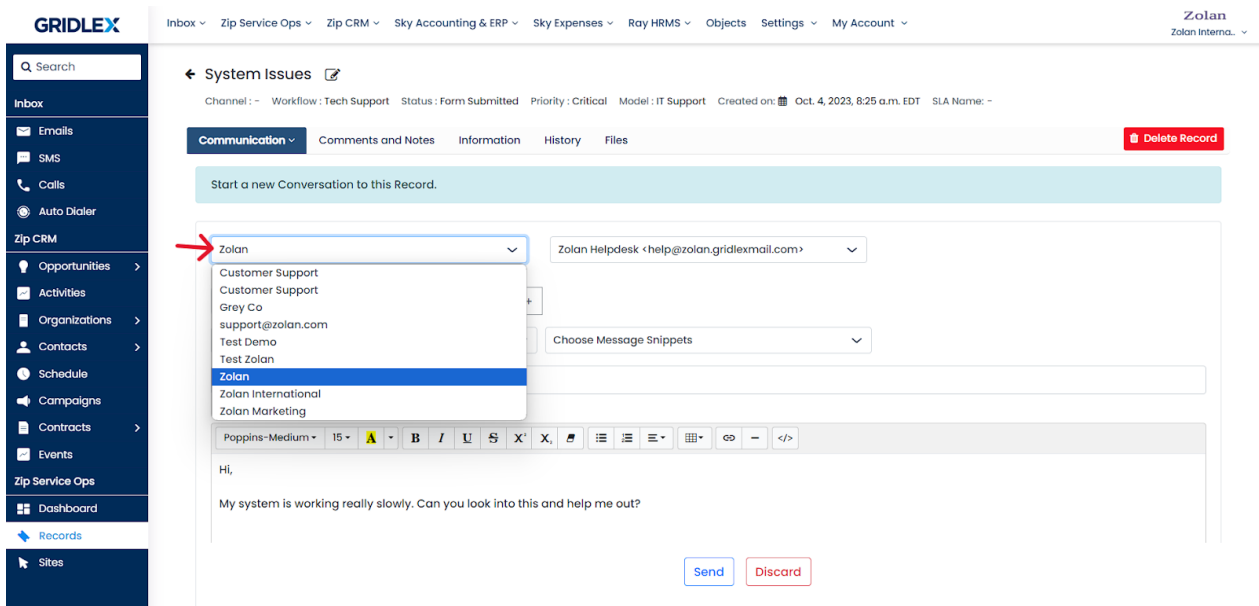
The screenshot shows the Gridlex interface. On the left is a sidebar with navigation options: Search, Inbox, Emails, SMS, Calls, Auto Dialer, Zip CRM, Opportunities, Activities, Organizations, Contacts, Schedule, Campaigns, Contracts, Events, Zip Service Ops, Dashboard, Records, and Sites. The main area is titled 'System Issues' and shows details for a specific issue: Channel: Tech Support, Status: Form Submitted, Priority: Critical, Model: IT Support, Created on: Oct. 4, 2023, 8:25 a.m. EDT, SLA Name: -. Below this, there are tabs for Communication, Comments and Notes, Information, History, and Files. The 'Communication' tab is selected, and a red arrow points to the 'New Conversation' button. Other buttons include 'Delete Record' and 'Edit'. Below the tabs, there is a section for 'Record Standard Information' with fields for Record ID, Model, Workflow, Status, Channel, Priority, Labels, Assign Units, Assign User, and Record Description.

Note: If you want to view all the previous email threads, click the “Communications” tab. You can reply to or forward emails according to your requirements. Refer to the screenshot below for more information.

This screenshot shows the same Gridlex interface as the previous one, but with the 'Communication' tab selected. A red arrow points to the 'Communication' tab. The email thread is visible, showing a message from 'navya@gridlex.com' to 'help@zolan.gridlexmail.com' with the subject 'System Issues'. The message body says 'Thank you for the update. On Wed, Oct 4, 2023 at 5:58 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi, We are w...'. Below the message, there are buttons for 'Reply', 'Reply all', and 'Forward'. The 'Communication' tab is highlighted, and the 'New Conversation' button is visible.

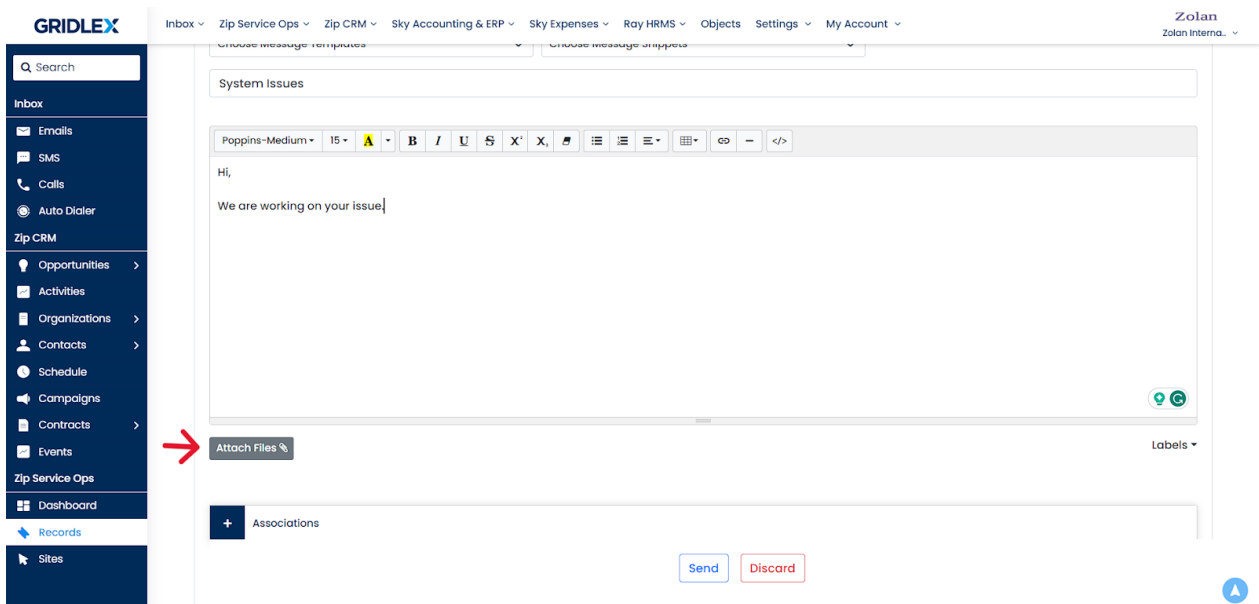
Step 4: Now you can draft your email. First select the inbox from which you want to start the conversation.

Note: In the Gridlex app suite, you can create shared inboxes for various purposes, this allows users to send and have access to all emails related to a specific criteria all in one place. For instance, you create an inbox for leads, and whenever there's an inbound lead lands in this inbox, everyone who has access to this inbox will be able to see the email. For any internal discussions related to leads, users will send them to this inbox.



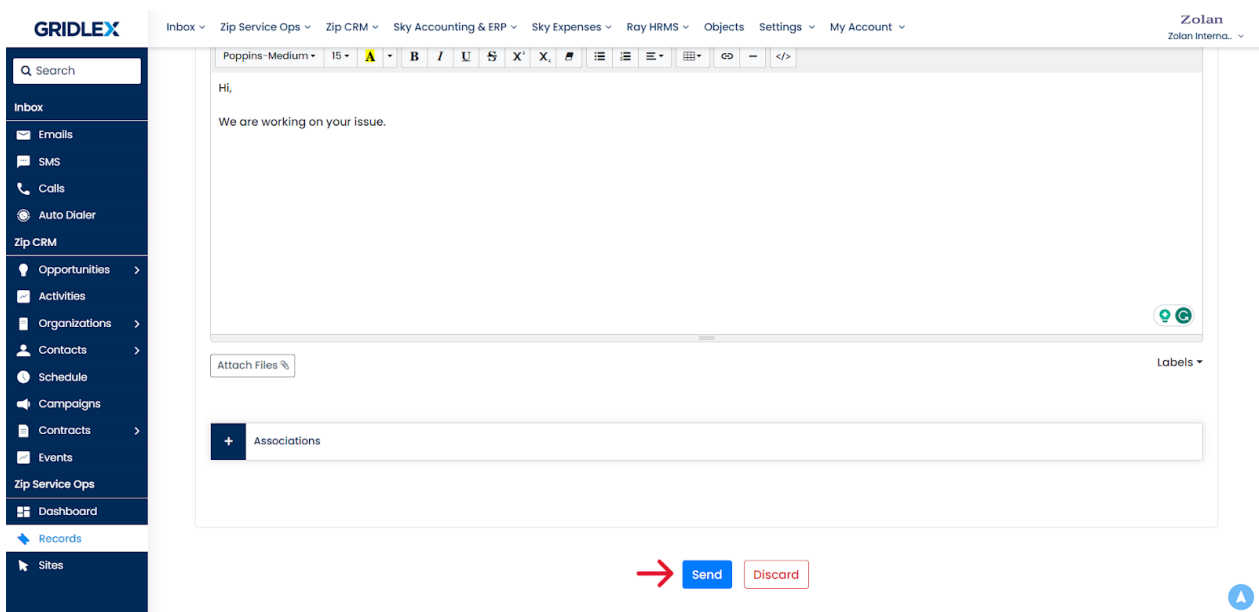
Step 5: Select the email address from which you want to send the email.

Note: A shared inbox can have a number of email IDs. You can select an email ID based on your requirement.



If you wish to associate contacts or organizations to the Record, click on “Associations” and you can search and add them.

Step 9: Once done, click “Send.”



You have successfully added a record and accessed record communications in Gridlex Zip. You can now view, track, and manage the record whenever needed.

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.