

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.

The screenshot shows the Zolan Gridlex App Suite interface. It consists of five main columns: 'Inbox & Omnichannel', 'Zip', 'Sky', 'Ray', and 'Enterprise Admin'. Each column has a dropdown menu at the top. The 'Zip' column is highlighted with a red arrow pointing to the 'Records' option in its dropdown menu. The 'Records' option is also highlighted with a blue box. The other options in the 'Zip' dropdown include CRM, Accounting & ERP, Timesheet, HRMS, Expenses, and Automations. The 'Enterprise Admin' column includes options like Add Users, Add Unit, and Zip Service Ops Settings.

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

List of Saved Views								<input type="button" value="Save View"/>	<input type="button" value="Clear Filters"/>	<input type="button" value="Export to Excel"/>	<input type="button" value="Add New"/>
Record ID	Record Subject (Subject)	Status	Priority	Labels	Units	Assigned To	Created By				
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	Mohit					
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			Navy					
1189798791344771072	BioPharm Innovations Collaboration Agreement	Form Submitted	High	Bugs							
1189785507802425216	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.

List of Saved Views								<input type="button" value="Save View"/>	<input type="button" value="Clear Filters"/>	<input type="button" value="Export to Excel"/>	<input type="button" value="Add New"/>
Record ID	Record Subject (Subject)	Status	Priority	Labels	Units	Assigned To	Created By				
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	Assigned to Support Executive									
1205333772179546112	[ignore] testing - record with status customization and signature fields	Assigned to Support Executive	Low			Ravi					
128	Intake Form- Christina Bells	Invalid Form Details	Normal	Southwest							
126	Intake Form- John Doe	Valid Insurance	High	Southeast							
127	Intake Form- Robert Shore	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.

The screenshot shows the GRIDLEX application interface. On the left is a sidebar with navigation links like Inbox, Zip CRM, Zip Service Ops, Dashboard, Records, and Sites. The main area is a grid view with columns for Record ID, Status, Priority, Labels, Units, and Assigned To. A context menu is open over the 'Assigned To' column, showing options like Sort Ascending, Sort Descending, Columns, and Reset. The 'Assigned To' column header is highlighted in green. A red arrow points to the 'Apply' button in the context menu.

Record ID	Status	Priority	Labels	Units	Assigned To
1165905898775420928	Normal	Normal	Orders		Executive
1165909382526574592	Normal	Normal	Orders		Assigned to Support Executive
1165908935711563776	Normal	Normal	Orders		Invalid Form Details
1189798791344771072	High	High	Bugs		Form Submitted
1189453412107497472	Critical	Critical			Initial Inquiry
1189752244775112704	Low	Low			Form Submitted
1203868156109205504	Normal	Normal	Southwest		Assigned to Support Executive
1205333772179546112	Normal	Normal	Ravi		Assigned to Support Executive
128	Normal	Normal	Southwest		Invalid Form Details
126	High	High	Southeast		Valid Insurance
127	Normal	Normal	Southwest		Invalid Form Details

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

The screenshot shows the GRIDLEX application interface with a different column order. The 'Created On' column has been moved to the first position in the grid. A red arrow points to the 'Created On' column header, which is now the first column in the grid. The rest of the columns remain in their previous positions: Status, Priority, Labels, and Assigned To.

Record ID	Created On	Status	Priority	Labels	Assigned To
1165905898775420928	Jun 20 2023, 12:58 PM	Normal	Normal	Orders	Executive
1165909382526574592	Jun 20 2023, 1:12 PM	Normal	Normal	Orders	Assigned to Support Executive
1165908935711563776	Jun 20 2023, 1:10 PM	Normal	Normal	Orders	Invalid Form Details
1189798791344771072	Aug 25 2023, 11:20 AM	High	High	Bugs	Form Submitted
1189453412107497472	Aug 24 2023, 12:28 PM	Critical	Critical		Initial Inquiry
1189752244775112704	Aug 25 2023, 8:15 AM	Low	Low		Form Submitted
1203868156109205504	Oct 03 2023, 7:07 AM	Normal	Normal	Southwest	Assigned to Support Executive
1205333772179546112	Oct 07 2023, 8:11 AM	Normal	Normal	Southwest	Assigned to Support Executive
128	May 16 2022, 6:05 PM	Normal	Normal	Southwest	Invalid Form Details
126	May 16 2022, 6:02 PM	High	High	Southeast	Valid Insurance
127	May 16 2022, 6:03 PM	Critical	Critical	Southwest	Invalid Form Details

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 shows the GRIDLEX application interface. On the left is a dark sidebar with navigation links: 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 'List of Saved Views' with buttons for 'Save View' and 'Clear filters'. A table lists records with columns for Record ID, Created On, Record Subject (Subject), Status, Priority, and Labels. A context menu is open over the first record, showing options like Sort Ascending, Sort Descending, Columns, Filter, and Equal to. The 'Equal to' field contains 'Clinical Trial Agreement'. Below this, there are 'And' and 'Or' buttons, and a 'Filter' button. Red arrows point from the text 'Clinical Trial Agreement' and the 'Filter' button to their respective locations in the menu. A green box highlights the 'Assigned to Support Executive' status in the table. The top right corner shows the user 'Zolan' and 'Zolan Interna..'. The bottom right of the table shows 'Set Column Position' and a dropdown menu with options like Executive, Assigned to Support Executive, Invalid Form Details, and Valid Insurance.

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

The screenshot shows the GRIDLEX application interface. On the left is a dark sidebar with various menu items: Inbox, Zip Service Ops, Zip CRM, Sky Accounting & ERP, Sky Expenses, Ray HRMS, Objects, Settings, and My Account. The main area displays a list of records with columns for Record ID, Created On, Record Subject (Subject), Status, Priority, and Labels. One record is highlighted with a red background. At the top of the main area, there are buttons for 'List of Saved Views', 'Save View', 'Clear Filters', 'Export to Excel', and 'Add New'. A red arrow points to the 'Save View' button.

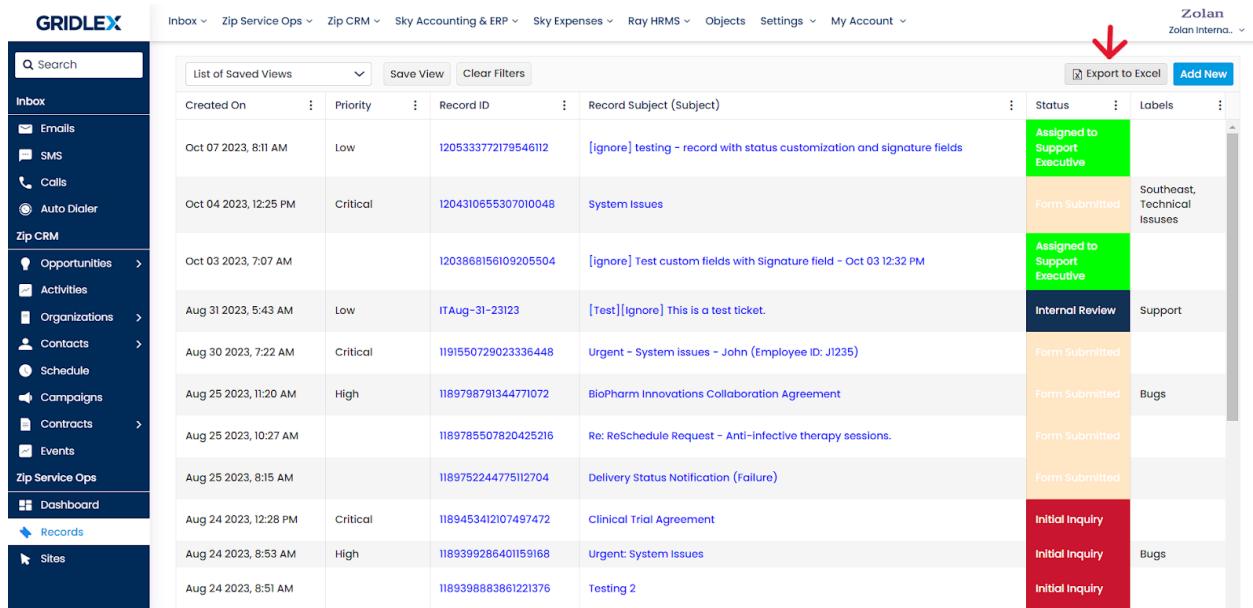
3. Column Positioning

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.

The screenshot shows the GRIDLEX application interface with a list of records. The 'Created On' column has a context menu open, showing options like 'Sort Ascending', 'Sort Descending', 'Columns', 'Filter', 'Set Column Position', and 'Stick Column'. A red arrow points to the 'Stick Column' button. The main table columns include Created On, Priority, Record ID, Record Subject (Subject), Status, and Labels. Some cells contain placeholder text like '[ignore]' or ticket descriptions. The status column uses color coding: green for 'Assigned to Support Executive', orange for 'Form Submitted', dark blue for 'Internal Review', and grey for 'Bugs'.

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.



The screenshot shows the GRIDLEX application interface. On the left is a dark sidebar with various menu items: Inbox, Zip Service Ops, Zip CRM, Sky Accounting & ERP, Sky Expenses, Ray HRMS, Objects, Settings, and My Account. The main area displays a listing of records with columns for Created On, Priority, Record ID, Record Subject (Subject), Status, and Labels. One record has a green status bar indicating 'Assigned to Support Executive'. Another has an orange status bar indicating 'Form Submitted'. A third has a dark blue status bar indicating 'Internal Review'. A fourth has an orange status bar indicating 'Form Submitted' and is associated with the label 'Southeast, Technical Issues'. A fifth has a dark blue status bar indicating 'Assigned to Support Executive'. A sixth has a dark blue status bar indicating 'Internal Review' and is associated with the label 'Support'. A seventh has an orange status bar indicating 'Form Submitted' and is associated with the label 'Bugs'. A eighth has a dark blue status bar indicating 'Form Submitted'. A ninth has a dark blue status bar indicating 'Initial Inquiry'. A tenth has a dark blue status bar indicating 'Initial Inquiry' and is associated with the label 'Bugs'. A eleventh has a dark blue status bar indicating '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.

List of Saved Views							<input type="button" value="Save View"/>	<input type="button" value="Clear Filters"/>	<input type="button" value="Export to Excel"/>	<input type="button" value="Add New"/>
Created On	Priority	Record ID	Record Subject (Subject)	Status	Labels	Units	Assigned To			
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	11Aug-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.'

List of Saved Views							<input type="button" value="Save View"/>	<input type="button" value="Clear Filters"/>	<input type="button" value="Export to Excel"/>	<input type="button" value="Add New"/>
Record ID	Record Subject (Subject)	Status	Priority	Labels	Units	Assigned To				
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	Mohan				
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			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.'

The screenshot shows the Gridlex Zip interface with a 'Save View' dialog box overlaid. The dialog box has a title 'Save View' and a text input field containing 'Top Priority'. Below the input field is a checkbox labeled 'Set as Default' which is checked. A red arrow points from this checkbox to a 'Save' button at the bottom right of the dialog. The background shows a list of records with columns for Record ID, Record Subject (Subject), Priority, Labels, Units, and Assigned To. The 'Assigned To' column includes names like Ravi Teja, Mohan, and Navya.

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 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.