Follow the below steps to convert an email to a record in Gridlex App Suite.

Step 1: Log in to your Gridlex App Suite account and click on the "Email" option under the Inbox & Omnichannel tab.

Step 2: Select your preferred inbox and open the email you want to convert to a record.

Step 3: Click on "Create Record" from the menu bar.

Step 4: Choose the model and fill in all the required details.

Note: Once you click "Create Record," the email subject and description will be automatically added as the record subject and description, but you can still make any edits if needed.

Step 5: Choose the record status, priority, and labels, and assign units from the dropdowns.

Note: The channel is automatically set to email as we are converting an email to a record.

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

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.

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

Note: Organizations that are associated with the email will be auto-associated.

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."

Note: Contacts that are associated with the email will be auto-associated.

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

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

Your record has been created, and you can view and track it under the "Records" tab.

Step 12: To directly view this record from the email, go to the email thread and click on the "Records" tab. Or hover over the Records tab to directly access specific tabs of the record, like Record Communication, Record Info, etc.

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.