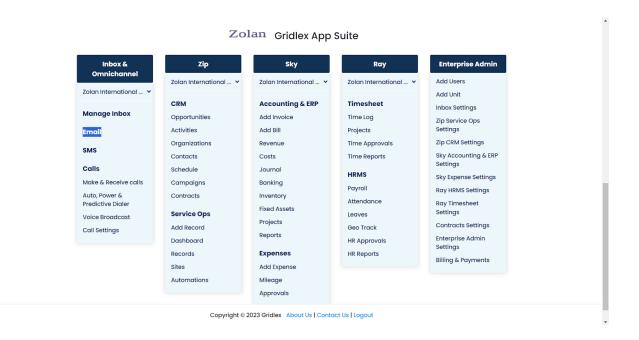
Follow the below steps to convert an email to a record in Gridlex App Suite.

**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.

GRIDLEX	Inbox 🗸 🛛 Zip Servio	ce Ops 🗸 Zip CRM 🗸 Sky Accounting & ERP 🗸 Sky Expenses 🗸 Ray HRMS 🗸 Objects Settings 🗸 My Account 🗸	Zolan Zolan Interna.
<b>)</b> Search	Inbox Sent	Drafts Trash Spam Outgoing Scheduled Compose Choose Inbox	Zolan (Shared)
xoc			Customer Support (Shared)
Emails	Search	т	Customer Support (Shared) Grey Co (Shared)
SMS			support@zolan.com (Shared)
Calls			Test Demo (Personal) Test Zolan (Shared)
Auto Dialer	Navya Deepik	Re: System Issues Thank you for the update. On Wed, Oct 4, 2023 at 5:58 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi, We are working on I	Zolan (Shared)
			Zolan International (Shared) Zolan Marketing (Shared)
CRM Opportunities >	help@zolan.g	Clinical Trial Agreement The Clinical Trial Agreement between BioNexa Pharmaceuticals and GreenLabs Research Institute outlines the collaboration where Gree	Aug 24
Activities Organizations	morristown@	Re: ReSchedule Request - Anti-infective therapy sessions. Hello Harry Andrews, As per your request, we will reschedule the appointment to 10:00 a.m. on June 23, 2023. Have a pleasant day. On To	Jun 20, 2023
Contacts >	help@zolan.g	Re: Request Regarding - Anti-infection Therapy sessions Hi Harry Andrews, it is Good to hear from you, regarding Anti-infection Therapy sessions with us. We are pleased to provide service for y	ou at June 22n Jun 20
Schedule		Call & SMS Feature	Jun 29,2022
Campaigns	help@zolan.g	Hi, Thanks for reaching out. Yes, they are both up and running with full functionality. We'll give you a call to explain more On Wed, Jun 2	29, 2022 12:32 a
Contracts >	Gabriel Feing	Re: Meeting Tomorrow	Jun 29,2022
Service Ops	oublief feilig	Perfect, likewise On Tue, Jun 28, 2022 at 2:56 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi Gabriel, No worries, 10am work	s for us. I'll rese
Dashboard	Gabriel Feing	Pipeline Bug? Hi Zolan team, Everything is good, I just wanted to let you know that when you click on the "Contracts" pipeline there is no follow up actic	Jun 29,2022
Records		Feedback on the UI/UX	
Sites	Himanshu Jat	Hi Zolan Team, I've been using the Helpdesk + CRM software for the past couple of days and I have great feedback for the product. Plea:	se keep up the May 16,2022

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

GRIDLEX	Inbox ~ Zip Service Ops ~ Zip CRM ~ Sky Accounting & ERP ~ Sky Expenses ~ Ray HRMS ~ Objects Settings ~ My Account	~	Zolan Zolan Interna.
<b>2</b> Search	Inbox Sent Drafts Trash Spam Outgoing Scheduled Compose		
box			
2 Emails	← ReSchedule Request - Anti-infective therapy sessions. SENT (NBOX)	2 Messages in	the thread
SMS			
Calls	Image: Create Record     Image: Organizations     Image: Records     Image: Create Records	A	ssociations
Auto Dialer			
p CRM	From: Harry Andrews	Tue, Jun 20, 6:15 p.m. IST	•
Opportunities >	to: morristown@zolan.gridlexmail v	· · · · · · · · · · · · · · · · · · ·	
Activities	Hi Morristown Medical Center,		
Organizations >			
Contacts >	It's great to hear from you about anti-infection therapy sessions. But I will not be available at the scheduled time.		
Schedule	Would you mind rescheduling it?		
Campaigns	Thanks and Regards,		
Contracts >	Harry Andrews		
p Service Ops			
Dashboard	From: morristown@zolan.gridlexmail.com	Tue, Jun 20, 6:20 p.m. IST	•
Records	to: Harry Andrews ~		
Sites	Hello Harry Andrews, As per your request, we will reschedule the appointment to 10:00 a.m. on June 23, 2023.		

**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.

GRIDLEX	Inbox ~ Zip Service Ops ~ Zip CRM ~ Sky Accounting & ERP ~ Sky Expenses ~ Ray HRMS ~ Ob	iects Settings v My Account v	olan Interna
<b>Q</b> Search		-Choose Model-	
box	Add Record	Zip Test Model V Add Nev	ew Mod
		Zip Test Model	
Emails		Contract Submission	
SMS	Subject	Contracts Secondary Contract	
Calls	Re: ReSchedule Request - Anti-infective therapy sessions.	IT Support	
		Demo	
Auto Dialer	Reference Description	Test Marketing	
ip CRM	Poppins-Regular • 15 • $\mathbf{A}$ • $\mathbf{B}$ $I$ $\underline{\mathbf{U}}$ $\mathbf{S}$ $\mathbf{X}$ , $\mathbf{Z}$ $\equiv$ $\equiv$ $\equiv$ $\equiv$ • $\equiv$ • $=$ • $\mathbf{m}$ • • • •	Intake Form Your Issue/Request Has Been Registered	
Contacts > Contacts > Contacts > Contacts > Contracts >	As per your request, we will reschedule the appointment to 10:00 a.m. on June 23, 2023. Have a pleasant day.		
Records		(	<u> </u>
Sites	Status (IT Support) • Priority	Channel	

**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.

GRIDLEX	nbox × Zip Service Ops × Zip CRM × Sky Account	ing & I	ERP ~ Sky Expenses ~ Ray HRM	S ~ Objects Setting:	s 🗸 My Account 🗸	Zolan Zolan interna v
<b>Q</b> Search	Poppins-Regular • 15 • A • B I U S	Х,	X, 8 Ξ Ξ Ξ· Ⅲ·	GD -		
Inbox	Hello Harry Andrews,					
🔛 Emails	As per your request, we will reschedule the appoint	ntmen	nt to 10:00 a.m. on June 23, 2023.			
📁 SMS	Have a pleasant day.					
📞 Calls						
💿 Auto Dialer						
Zip CRM						
Opportunities >						
ᠵ Activities						
Organizations >						ତ୍ର କ୍ର
Contacts >						
🕔 Schedule	Status (Tech Support) *		Priority		Channel	
┥ Campaigns	Initial Inquiry 🕶		High	~	Email	~
Contracts >	Labels					
Zip Service Ops	× Orders					~
Dashboard						
Records	Assign Units					
🔭 Sites	× Marketing Unit					Ň
	Assign Liser					

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

	Assign Units							lolan Interna
Search	× Marketing U	nit						~
юх	Assign User							
Emails	Assign user							
SMS	Action	Name	Name			Units		
Calls			No User is assigned to	o this record. Please search U	ser in below panel to assi	gn with this record.		
Auto Dialer								
CRM	abhi						×	Q Search
Opportunities >	Action	Name	Name		Email			
Activities	Assign 🗲	ABHILASH AVIRINENI		abhilash@gridlex.com	abhilash@gridlex.com		dmin	
Organizations >								
Contacts >								
Schedule	Associated Co	unterparties :						
Campaigns	Action	Name	Phone	Address	Town	State	ZipCode	Unit Na
Contracts >			No Count	erparties are associated to th	nis record. Please search (	counterparties in below panel to	associate with this rec	ord.
Service Ops	4							+
Dashboard					Commission Name			O or much
Records	search and	Associate Counterpartie	5		Organization Name		~	Q Search
Sites								

**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 Servi	ce Ops ~ Zip CRM ~ Sky A	Accounting & ERP ~	Sky Expenses ~ Ray HR	MS ~ Objects	Settings ~ My A	Account ~		Zolan Zolan Interna
<b>Q</b> Search	abhi							×	Q Search
box	Action	Name		Email		Units			
2 Emails		Name		Linen		onito			
SMS	Assign	ABHILASH AVIRINENI		abhilash@gridlex.com		Zip Helpde	sk Demo , Super Ad	min	
_ Calls									
Auto Dialer	Associated Co	internarties :							
p CRM	Associated con	anterparties.							
Opportunities >	Action	Name	Phone	Address		Town	State	ZipCode	Unit Naı
Activities			No Counter	parties are associated to thi	s record. Please se	arch Counterparties	in below panel to a	ssociate with this re	cord.
Organizations >	4								÷
Contacts >	united			×	Organization Na	me		~	Q Search
Schedule	Action	Name	Phone	Address	Select Option Native Fields				Unit Na
Campaigns					Organization	ID			
Contracts >				7570,176th St	Organization All Addresses				
p Service Ops	Associate	United Resources 🕼		7570,1760150	Organization G	eneral Information	Organization Ac	Iditional Informati	n
Dashboard					Network Id Organization	Type			
Records						/1			
Sites	Management	ciated Organizations :							

**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 autoassociated.

GRIDLEX	Inbox 🗸 Zip Servie	ce Ops ~ Zip CRM ~	Sky Accounting & ERP ~ S	ky Expenses ~ Ray HI	RMS - Objects	s Settings ~ N	ly Account 🗸		Zolan Zolan Interna
earch	Manually Assoc	ciated Organizations :							
1	Action	Name	Phone	Address		Town	State	ZipCode	Unit Na
Emails	Action	Nume	FIGHE	Address		TOWIT	Sidle	zipcode	Officiation
SMS			No Organiza	tions are associated to th	his record. Please s	search Organization	is in below panel to as	sociate with this rea	ord.
Calls	•								•
uto Dialer	google			×	Organization M	lame		~	Q Search
RM	Action	Name	Phone	Address	Select Option Native Fields				Unit Na
pportunities >					Organizatio Organizatio				
Activities	Associate	google 🕜			All Addresse				
Organizations >					Organization Network Id	General Informati	on   Organization Ad	ditional Informati	on
Contacts >					Organizatio	n Type			
Schedule	Associate	google 🗷							
Campaigns							_		
Contracts >									,
ervice Ops	Manually Assoc	ciated Contacts :							
ashboard									
tecords	Action	Name	Phone	Address		Town	State	ZipCode	Unit Na
lites			No Cont	acts are associated to th	nis record. Please s	search Contacts in I	pelow panel to associa	te with this record.	

**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 autoassociated.

GRIDLEX	Inbox ~ Zip Serv	ice Ops ~ Zip CRM ~ S	sky Accounting & ERP ~ SI	ky Expenses ~ Ray HI	RMS ~ Objects Set	tings 🕤 My Acc	count ~		Zolan Zolan Interna ~
<b>Q</b> Search	Manually Asso	cisted Contrate .							
Inbox	Manually Asso	ciated Contacts :							
🗠 Emails	Action	Name	Phone	Address	Tow	n	State	ZipCode	Unit Naı
SMS			No Conte	acts are associated to th	nis record. Please search	Contacts in below	panel to associate	with this record	l.
Calls	4								Þ
Auto Dialer	John D			×	Select Option			~	Q Search
ip CRM	Action	Name	Phone	Address	Select Option Native Fields				Unit Naı
Opportunities >					Contact ID				
Activities	Associate	John Doe 🗭			Contact Profile   Cat Category	egory			Super Ac
Organizations >	4					_			•
Contacts >	Associated Co	ntracts :							
Schedule	Action	ID	Name	Start Date	e	End Date	Contra	ct Due Si	atus
) Campaigns		No Cr	ontracts are associated to this	record Please search C	contracts in below panel	to associate with t	his record		
Contracts >									
p Service Ops	Search and A	Associate Contracts							Q Search
Dashboard									
Records	Attachments								
Sites	Add Attachmen	nts 🗞							

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

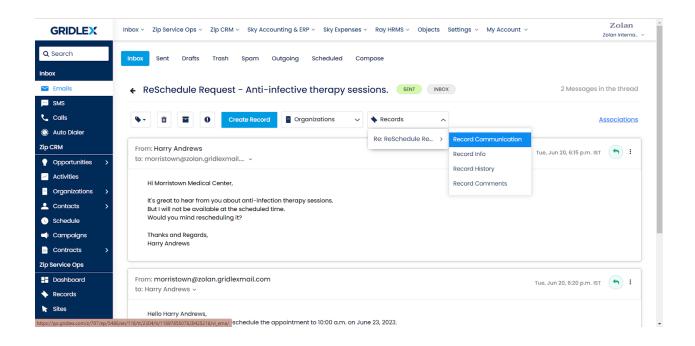
GRIDLEX	Inbox ~ Zip Service	e Ops ∽ Zip CRM ∽ Sky Acc	ounting & ERP ~ Sky Expense	es ~ Ray HRMS ~ C	Objects Settings ~ My Account ~		Zolan Zolan Interna.
<b>Q</b> Search				No Contacts f	found with the search keyword John D		
nbox	x						•
🗠 Emails	Associated Cont	racts :					
SMS	Action	ID	Name	Start Date	End Date	Contract Due	Status
📞 Calls		No Contract	s are associated to this record. Ple	ease search Contracts ir	below panel to associate with this record	l.	
Auto Dialer							
Zip CRM	distribution						🗙 🔍 Search
P Opportunities >	Action	ID	Name	Start Date	End Date	Contract Due	Status
Activities	Associate	1189028066803728385	Distribution Agreement				
Organizations >		10302000003720303	Distribution Agreement				
💄 Contacts 🛛 🔸							
🕔 Schedule	Attachments	_					
🗣 Campaigns	Add Attachments	Ø					
Contracts							
Zip Service Ops							
Dashboard	Bank Details						
Records							_
Sites	Bank Name *		Bank IFSC Code		UAN Number		

**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.

GRIDLEX	Inbox ~ Zip Service	Inbox × Zip Service Ops × Zip CRM × Sky Accounting & ERP × Sky Expenses × Ray HRMS × Objects Settings × My Account ×							
<b>Q</b> Search	Search and Ass	ociate Contacts		Select Option			V Q Search		
Inbox	Associated Contr	acts :							
🗠 Emails	Action	ID	Name	Start Date	End Date	Contract Due	Status		
SMS									
📞 Calls	Disassociate	1189028066803728385	Distribution Agreement						
🕒 Auto Dialer	in the second								
Zip CRM	distribution						X Q Search		
Opportunities >	Action	ID	Name	Start Date	End Date	Contract Due	Status		
Activities			No Contracts foun	d with the search keyword distributio	'n				
Organizations >									
🚨 Contacts 💦 🗲	Attachments								
🕓 Schedule	Add Attachments	<b>—</b>							
┥ Campaigns									
Contracts									
Zip Service Ops				Add Record					
Dashboard									
Records									
Sites									

**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 <u>apps@gridlex.com</u> 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.