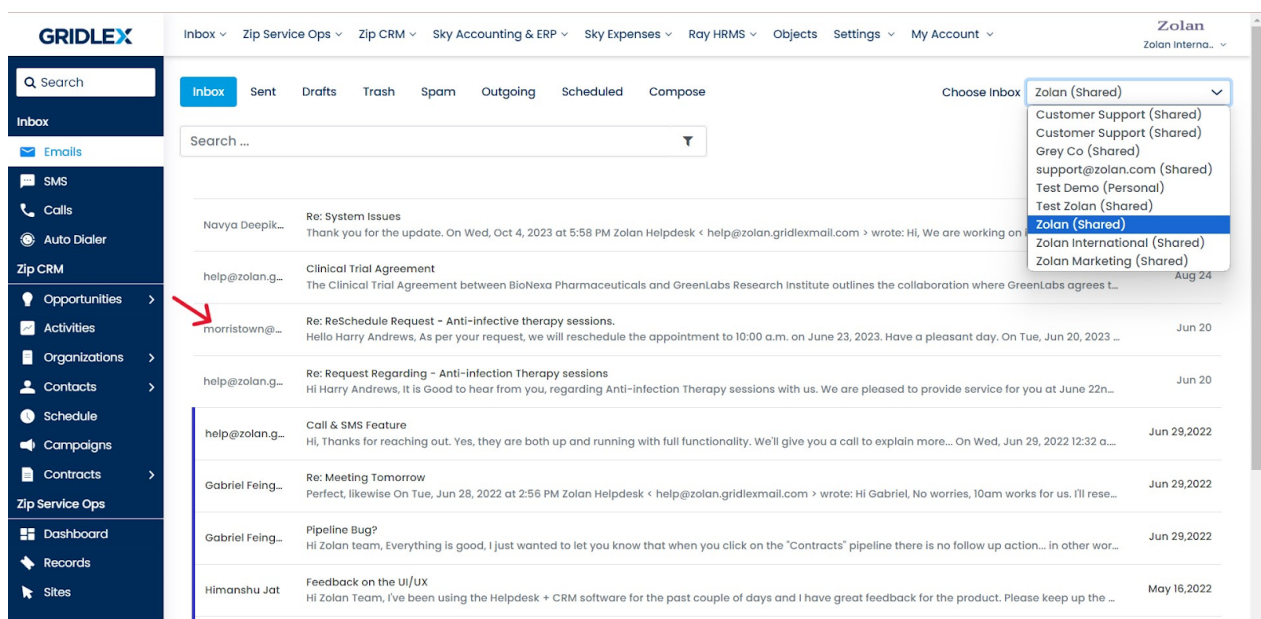


Follow the below steps to convert an email to a record in Gridlex App Suite.

**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.

The screenshot shows the GRIDLEX web application interface. On the left is a dark blue sidebar with a search bar and a menu containing 'Inbox', 'Emails', 'SMS', 'Calls', 'Auto Dialer', 'Zip CRM', 'Opportunities', 'Activities', 'Organizations', 'Contacts', 'Schedule', 'Campaigns', 'Contracts', 'Zip Service Ops', 'Dashboard', 'Records', and 'Sites'. The top navigation bar includes 'Inbox', 'Zip Service Ops', 'Zip CRM', 'Sky Accounting & ERP', 'Sky Expenses', 'Ray HRMS', 'Objects', 'Settings', and 'My Account'. The main content area displays an email thread titled 'ReSchedule Request - Anti-infective therapy sessions.' with a 'SENT' status. The email content includes a message from Harry Andrews to morristown@zolan.gridlexmail.com and a reply from morristown@zolan.gridlexmail.com to Harry Andrews. A 'Create Record' button is visible in the top action bar of the email view.

**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.

The screenshot shows the 'Add Record' form in the GRIDLEX application. The form has fields for 'Subject' (containing 'Re: ReSchedule Request - Anti-infective therapy sessions.') and 'Reference Description' (containing the email body text). A dropdown menu is open, showing a list of models to choose from: 'Zip Test Model', 'Contract Submission', 'Contracts Secondary', 'Contract' (highlighted), 'IT Support', 'Demo', 'Test Marketing', 'Intake Form', and 'Your Issue/Request Has Been Registered'. The bottom of the form shows a table with columns for 'Status (IT Support)', 'Priority', and '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.

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

Action	Name	Email	Units
Assign	ABHILASH AVIRINENI	abhilash@gridlex.com	Zip Helpdesk Demo , Super Admin

**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.

The screenshot displays the GRIDLEX application interface. On the left is a dark blue sidebar with navigation links: Inbox, Emails, SMS, Calls, Auto Dialer, Zip CRM, Opportunities, Activities, Organizations, Contacts, Schedule, Campaigns, Contracts, Zip Service Ops, Dashboard, Records, and Sites. The main content area has a top navigation bar with various dropdown menus (Inbox, Zip Service Ops, Zip CRM, Sky Accounting & ERP, Sky Expenses, Ray HRMS, Objects, Settings, My Account) and a user profile (Zolan, Zolan interna...). Below this is a search bar with the text 'abhi' and a search button. A table lists user information with columns for Action, Name, Email, and Units. The first row shows 'ABHILASH AVIRINENI' with email 'abhilash@gridlex.com' and units 'Zip Helpdesk Demo , Super Admin'. Below this is a section titled 'Associated Counterparties :'. It contains a table with columns: Action, Name, Phone, Address, Town, State, ZipCode, and Unit Name. A message states: 'No Counterparties are associated to this record. Please search Counterparties in below panel to associate with this record.' Below the message is another search bar with the text 'united' and a search button. A dropdown menu is open, showing options: 'Organization Name' (selected), 'Native Fields', 'Organization ID', 'All Addresses', 'Organization General Information | Organization Additional Information', 'Network Id', and 'Organization Type'. A red arrow points to the 'Associate' button in the table. At the bottom, there is a section titled 'Manually Associated Organizations :'. The user's name 'Zolan' is visible in the top right corner.

**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.

**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

**Zip Service Ops**

- Dashboard
- Records
- Sites

**Manually Associated Organizations :**

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

google

Associate

Organization Name

Select Option

Native Fields

Organization ID

Organization Name

All Addresses

Organization General Information | Organization Additional Information

Network Id

Organization Type

**Manually Associated Contacts :**

Action	Name	Phone	Address	Town	State	ZipCode	Unit Na
No Contacts are associated to this record. Please search Contacts in below panel to associate 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 auto-associated.

**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

**Zip Service Ops**

- Dashboard
- Records
- Sites

**Manually Associated Contacts :**

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

John D

Associate

Select Option

Select Option

Native Fields

Contact ID

Contact Profile | Category

Category

**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.						

Search and Associate Contracts

Search

**Attachments**

Add Attachments

**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: No Contacts found with the search keyword John D

**Inbox**

- Emails
- SMS
- Calls
- Auto Dialer

**Zip CRM**

- Opportunities
- Activities
- Organizations
- Contacts
- Schedule
- Campaigns
- Contracts

**Zip Service Ops**

- Dashboard
- Records
- Sites

**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 ✕ Search

Action	ID	Name	Start Date	End Date	Contract Due	Status
<b>Associate</b>	1189028066803728385	Distribution Agreement				

**Attachments**

**Add Attachments**

**Bank Details**

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

Search and Associate Contacts Select Option Search

**Inbox**

- Emails
- SMS
- Calls
- Auto Dialer

**Zip CRM**

- Opportunities
- Activities
- Organizations
- Contacts
- Schedule
- Campaigns
- Contracts

**Zip Service Ops**

- Dashboard
- Records
- Sites

**Associated Contracts :**

Action	ID	Name	Start Date	End Date	Contract Due	Status
<b>Disassociate</b>	1189028066803728385	Distribution Agreement				

distribution ✕ Search

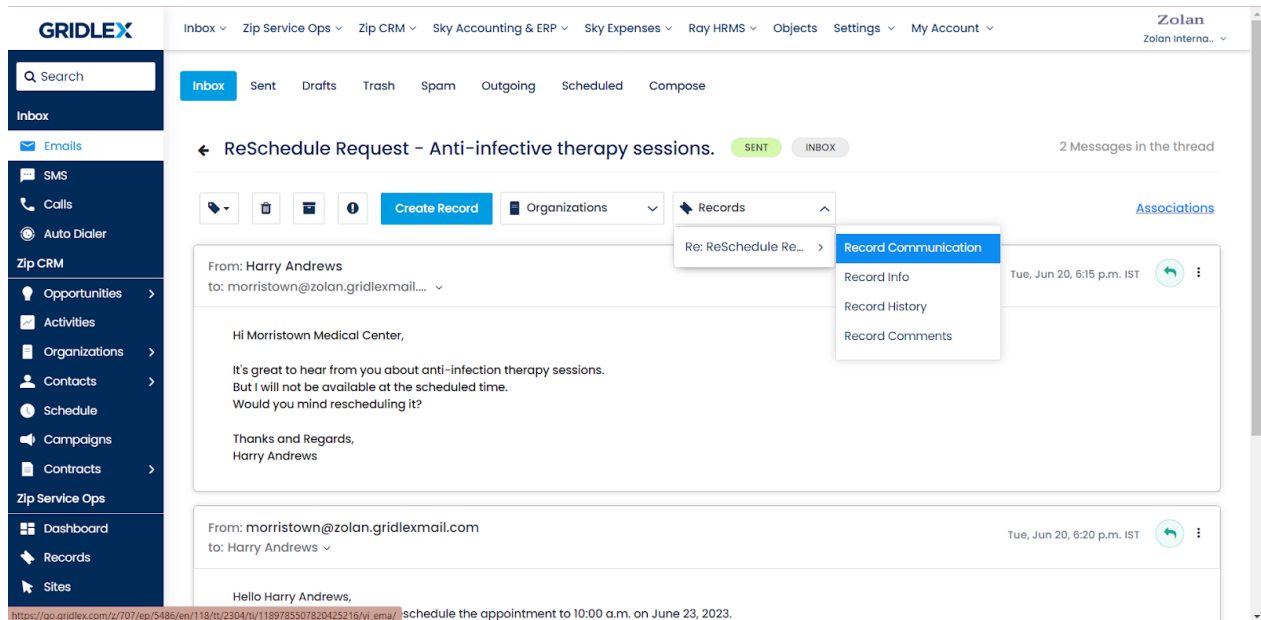
Action	ID	Name	Start Date	End Date	Contract Due	Status
No Contracts found with the search keyword distribution						

**Attachments**

**Add Attachments**

**Add Record**

**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, Record History, etc.



If you need any help with any feature, data migration of your old data, or anything at all, just email [apps@gridlex.com](mailto: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.