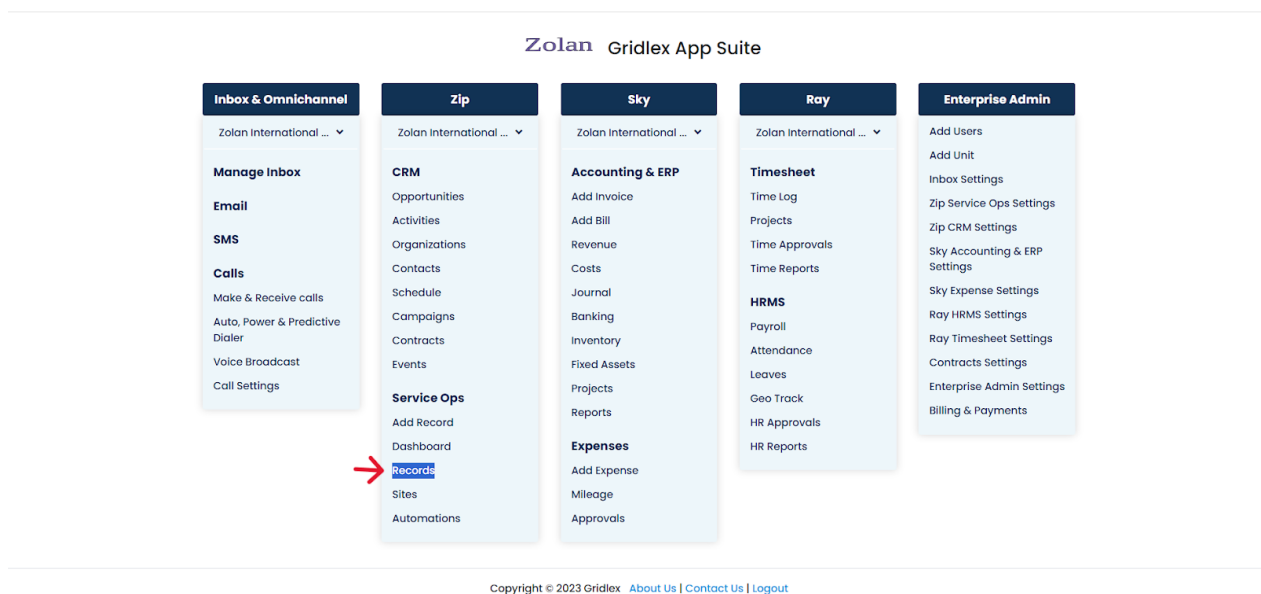


Welcome to our comprehensive guide on managing Record files in Gridlex Zip.

Gridlex Zip includes a record history viewing feature designed to offer a comprehensive overview of past customer interactions. This feature is vital for ensuring transparency and tracking the evolution of customer requests, providing a detailed timeline of updates and communications.

In this guide, we'll walk you through the simple steps to view the record history, ensuring you comprehensively understand past interactions and changes made to a record.

**Step 1:** Log in to the Gridlex App Suite and click 'Records' under the Zip section.



**Step 2:** Select the record that you want to see the history of.

**GRIDLEX** Zolan  
Zolan Intern...

Inbox Zip Service Ops Zip CRM Sky Accounting & ERP Sky Expenses Ray HRMS Objects Settings My Account

Search [ ]

List of Saved Views Save View Clear Filters Export to Excel Add New

Record ID	Record Subject (Subject)	Status	Priority	Labels	Units	Assig
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		
1189398883861221376	Testing 2	Initial Inquiry				
1189396927956602880	Testing 1	Form Submitted				
1189087660854693888	One plus - Distribution	Competitor Research			Super Admin, Zip Helpdesk Demo	Navy
1165909382526574592	Appointment Confirmation	New	Normal	Orders		
1165908935711563776	Appointment Confirmation		Normal	Orders		
1165905898775420928	Appointment Confirmation	Open	Normal	Orders		

### Step 3: Click 'History.'

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**Clinical Trial Agreement**

Channel: Email Workflow: Product Inquiry Status: Initial Inquiry Priority: Critical Model: Contract Created on: Aug. 24, 2023, 8:28 a.m. EDT SLA Name: -

Communication Comments and Notes **Information** History Files Delete Record Convert to Contract

Collapse all Edit

**Record Standard Information**

Record ID	Model *	Workflow *
1189453412107497472	Contract	Product Inquiry
Status *	Channel	Priority
● Initial Inquiry	Email	Critical
Labels	Assign Units	Assign User
-	-	-

Record Description \*

The Clinical Trial Agreement between BioNexa Pharmaceuticals and GreenLabs Research Institute outlines the collaboration where GreenLabs agrees to conduct a specific clinical trial for a drug provided by BioNexa. Key elements of the agreement include the trial's protocol, responsibilities of GreenLabs, compensation details, intellectual property rights stemming from the trial's results, confidentiality clauses, and the agreement's duration. Both parties must maintain strict confidentiality and follow specific guidelines and milestones as stipulated in the attached Protocol. The contract emphasizes the importance of ethical conduct, proper reporting, and the legal framework under which any discoveries or inventions will be managed.

The Clinical Trial Agreement between BioNexa Pharmaceuticals and GreenLabs Research Institute is a pivotal document formalizing their collaborative effort in the realm of drug

**Step 4:** On this page, scroll to view the changes made to the record. The latest modifications will be on top. Furthermore, you can also view the name of the user who made the changes along with the date.

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### Clinical Trial Agreement

Channel: Email | Workflow: Product Inquiry | Status: Initial Inquiry | Priority: Critical | Model: Contract | Created on: Aug. 24, 2023, 8:28 a.m. EDT | SLA Name: -

Communication | Comments and Notes | Information | **History** | Files

**Delete Record** | **Convert to Contract**

- ▶ Mohammed Nihal TT updated the record (Tue, Oct 10, 7:53 a.m. EDT) ←  
Contact: Brandon Brown was Associated
- ▶ Mohammed Nihal TT updated the record (Tue, Oct 10, 7:52 a.m. EDT)  
Organization: True Health was Associated
- ▶ Mohammed Nihal TT updated the record (Tue, Oct 10, 7:47 a.m. EDT)  
Counterparties: True Health was Disassociated
- ▶ Mohammed Nihal TT updated the record (Tue, Oct 10, 7:44 a.m. EDT)  
Counterparties: True Health was Associated
- ▶ Mohammed Nihal TT updated the record (Tue, Oct 10, 7:38 a.m. EDT)  
Organization: True Health was Disassociated  
Contact: Brandon Brown was Disassociated

Congratulations! You have now learned to view record history 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](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.