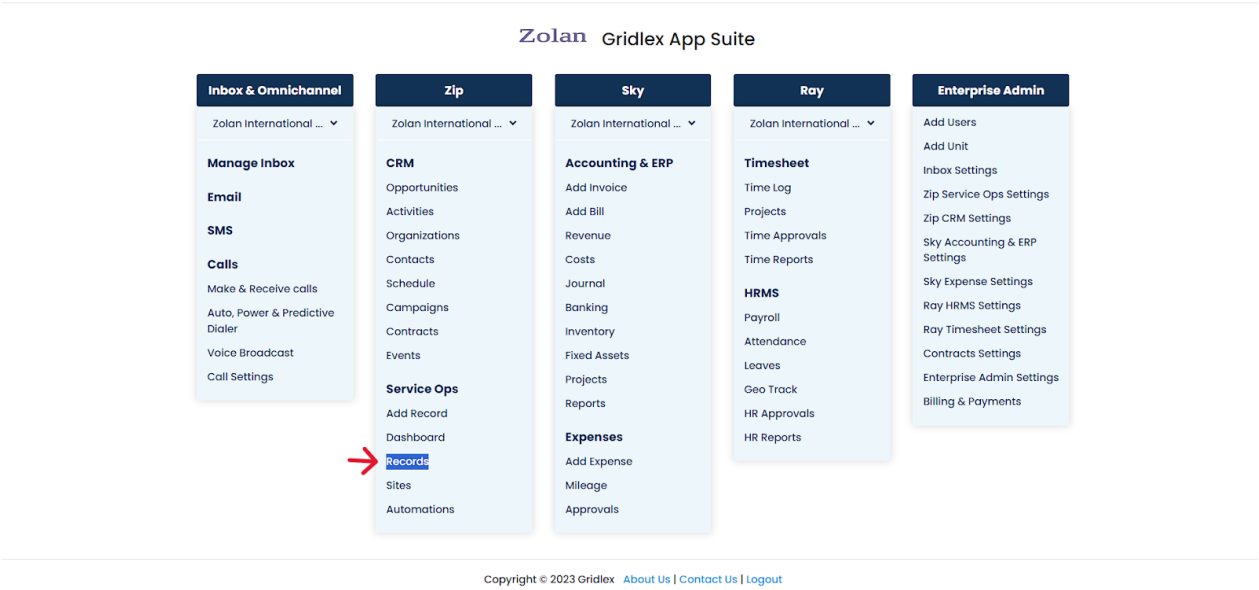


Welcome to our comprehensive guide on managing Record files in Gridlex Zip.

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.

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| 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 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.