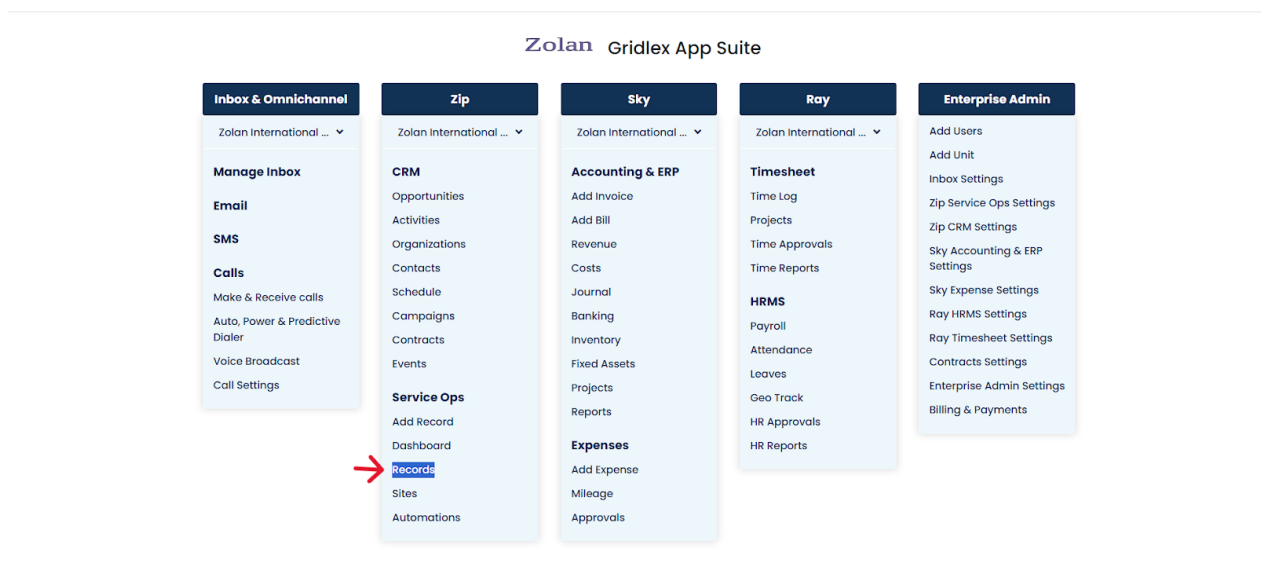


Welcome to our guide on managing Record files in Gridlex Zip.

In Gridlex Zip, each record can be associated with specific files, including essential documentation, images, or other relevant data. Properly managing these files keeps your database organized and ensures quick access and retrieval when needed.

This tutorial offers a detailed guide on managing files related to records in Gridlex Zip.

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



Step 2: Select the record you want to manage the files of.

GRIDLEX

Inbox

Zip Service Ops

Zip CRM

Sky Accounting & ERP

Sky Expenses

Ray HRMS

Objects

Settings

My Account

Zolan

Zolan Interna...

Q Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Events

Zip Service Ops

Dashboard

Records

Sites

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		
118939888386121376	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 “Files” from the menu bar.

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Inbox

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Settings

My Account

Zolan

Zolan Interna...

Q Search

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Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities

Activities

Organizations

Contacts

Schedule

Campaigns

Contracts

Events

Zip Service Ops

Dashboard

Records

Sites

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.

You can see all the files attached to the Record on this page.

GRIDLEX Inbox ▾ Zip Service Ops ▾ Zip CRM ▾ Sky Accounting & ERP ▾ Sky Expenses ▾ Ray HRMS ▾ Objects ▾ Settings ▾ My Account ▾ Zolan
Zolan Interna. ▾

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

Add Attachments Upload

3 Attachments:

Study Protocol.pdf Download Size: 11.7 kB Uploaded By: Mohammed Nihal TT Oct. 10, 2023, 5:52 a.m.	Regulatory Approval Documents.pdf Download Size: 11.7 kB Uploaded By: Mohammed Nihal TT Oct. 10, 2023, 5:52 a.m.	EmployeeDetails.xls Download Size: 9.3 kB Uploaded By: Navya Deepika Battu Oct. 4, 2023, 9:53 a.m.
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Inbox

- Emails
- SMS
- Calls
- Auto Dialer
- Zip CRM**
 - Opportunities >
 - Activities
 - Organizations >
 - Contacts >
 - Schedule
 - Campaigns
 - Contracts >
 - Events
 - Zip Service Ops
 - Dashboard
 - Records
 - Sites

Step 4: Click “Download” under any files you want to retrieve, and it will be saved to your system.

GRIDLEX Inbox ▾ Zip Service Ops ▾ Zip CRM ▾ Sky Accounting & ERP ▾ Sky Expenses ▾ Ray HRMS ▾ Objects ▾ Settings ▾ My Account ▾ Zolan
Zolan Interna. ▾

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

Add Attachments Upload

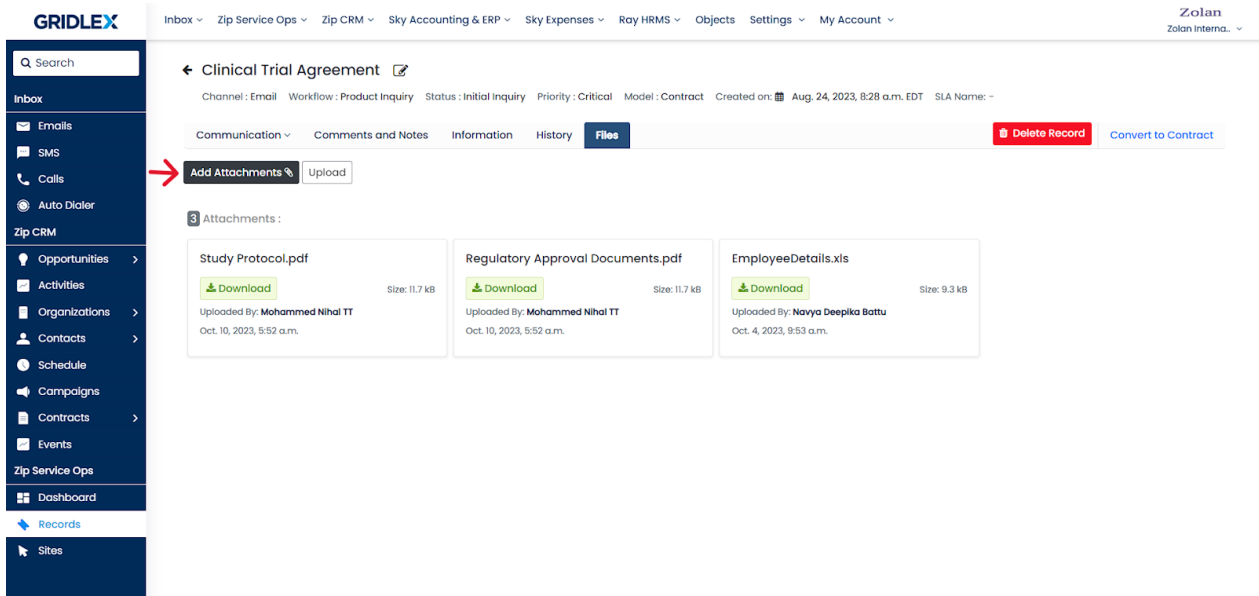
3 Attachments:

Study Protocol.pdf Download Size: 11.7 kB Uploaded By: Mohammed Nihal TT Oct. 10, 2023, 5:52 a.m.	Regulatory Approval Documents.pdf Download Size: 11.7 kB Uploaded By: Mohammed Nihal TT Oct. 10, 2023, 5:52 a.m.	EmployeeDetails.xls Download Size: 9.3 kB Uploaded By: Navya Deepika Battu Oct. 4, 2023, 9:53 a.m.
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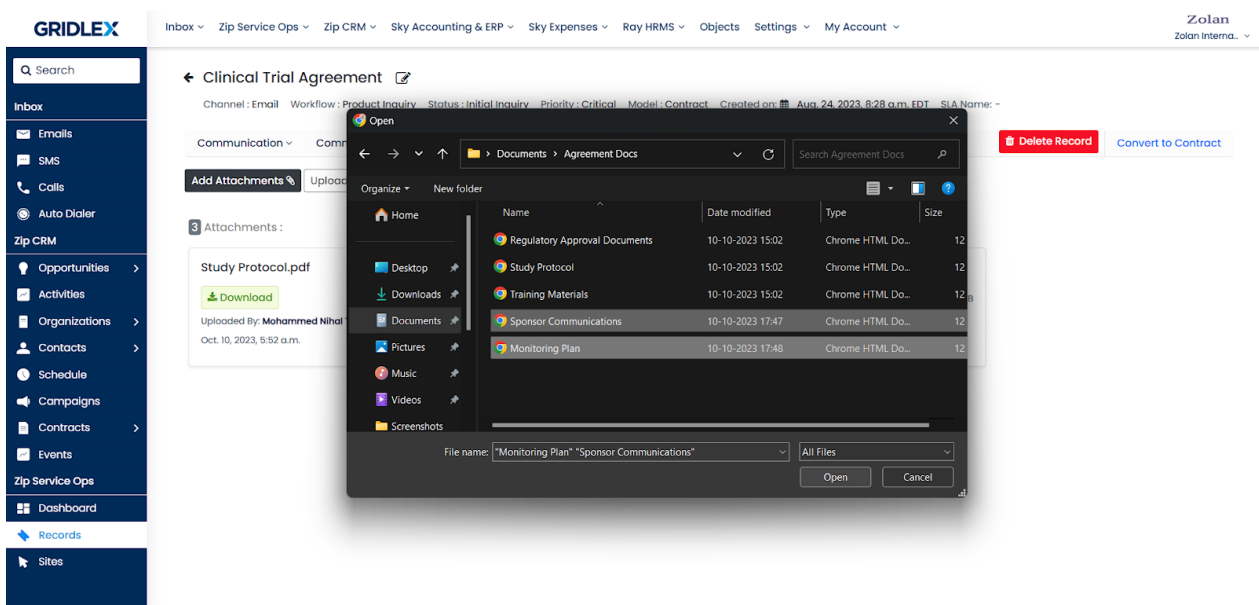
Inbox

- Emails
- SMS
- Calls
- Auto Dialer
- Zip CRM**
 - Opportunities >
 - Activities
 - Organizations >
 - Contacts >
 - Schedule
 - Campaigns
 - Contracts >
 - Events
 - Zip Service Ops
 - Dashboard
 - Records
 - Sites

Step 5: To attach more files to the Record, click “Add Attachments.”



Step 6: Select and open the files that you want to upload.



You can verify the documents that you have selected on this screen. If you wish not to upload a selected file, you can click on the trash can icon to delete it (See below)

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 >

Events

Zip Service Ops

Dashboard

Records

Sites

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

Sponsor Communications.pdf

11.7 kB

Monitoring Plan.pdf

11.7 kB

Add Attachments

Upload

3 Attachments :

Study Protocol.pdf

Download

Size: 11.7 kB

Uploaded By: Mohammed Nihal TT

Oct. 10, 2023, 5:52 a.m.

Regulatory Approval Documents.pdf

Download

Size: 11.7 kB

Uploaded By: Mohammed Nihal TT

Oct. 10, 2023, 5:52 a.m.

EmployeeDetails.xls

Download

Size: 9.3 kB

Uploaded By: Navya Deepika Battu

Oct. 4, 2023, 9:53 a.m.

Step 7: Click “Upload” once done.

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Settings

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Search

Inbox

Emails

SMS

Calls

Auto Dialer

Zip CRM

Opportunities >

Activities

Organizations >

Contacts >

Schedule

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Contracts >

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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

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Files

Delete Record

Convert to Contract

Sponsor Communications.pdf

11.7 kB

Monitoring Plan.pdf

11.7 kB

Add Attachments

Upload

3 Attachments :

Study Protocol.pdf

Download

Size: 11.7 kB

Uploaded By: Mohammed Nihal TT

Oct. 10, 2023, 5:52 a.m.

Regulatory Approval Documents.pdf

Download

Size: 11.7 kB

Uploaded By: Mohammed Nihal TT

Oct. 10, 2023, 5:52 a.m.

EmployeeDetails.xls

Download

Size: 9.3 kB

Uploaded By: Navya Deepika Battu

Oct. 4, 2023, 9:53 a.m.

You'll now see that the files have been uploaded.

The screenshot shows the Gridlex interface for a record titled "Clinical Trial Agreement". The top navigation bar includes "Inbox", "Zip Service Ops", "Zip CRM", "Sky Accounting & ERP", "Sky Expenses", "Ray HRMS", "Objects", "Settings", and "My Account". The right side shows the user "Zolan" and "Zolan Interna...". The left sidebar contains a search bar and a list of modules: "Inbox", "Emails", "SMS", "Calls", "Auto Dialer", "Zip CRM", "Opportunities", "Activities", "Organizations", "Contacts", "Schedule", "Campaigns", "Contracts", "Events", "Zip Service Ops", "Dashboard", "Records", and "Sites". The main content area shows the record details for "Clinical Trial Agreement" with a channel of "Email", workflow of "Product Inquiry", status of "Initial Inquiry", priority of "Critical", model of "Contract", and creation date of "Aug. 24, 2023, 8:28 a.m. EDT". The "Files" tab is selected, showing 5 attachments: "Monitoring Plan.pdf", "Sponsor Communications.pdf", "Study Protocol.pdf", "Regulatory Approval Documents.pdf", and "EmployeeDetails.xls". Each attachment has a "Download" button and upload details. Red arrows point to the "5 Attachments:" label and the "Download" button for "Monitoring Plan.pdf".

You can also see the number of attachments associated with the Record (See below)

This screenshot is similar to the one above, showing the "Clinical Trial Agreement" record with 5 attachments. A red arrow points to the "5 Attachments:" label, highlighting the count of attachments associated with the record.

Congratulations! You have learned how to manage Record files 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.

