Welcome to our comprehensive guide on utilizing the listing view in Gridlex.

The Records listing view is designed to streamline these tasks, offering an intuitive interface and powerful features that adapt to your unique needs.

This tutorial will walk you through the following:

- The "Columns" feature

- The "Filter" feature

- The "Set Column Position" feature

- The "Export to Excel" feature

- Additional features

Step 1: Log in to the Gridlex App Suite and click 'Records' under the Zip section.
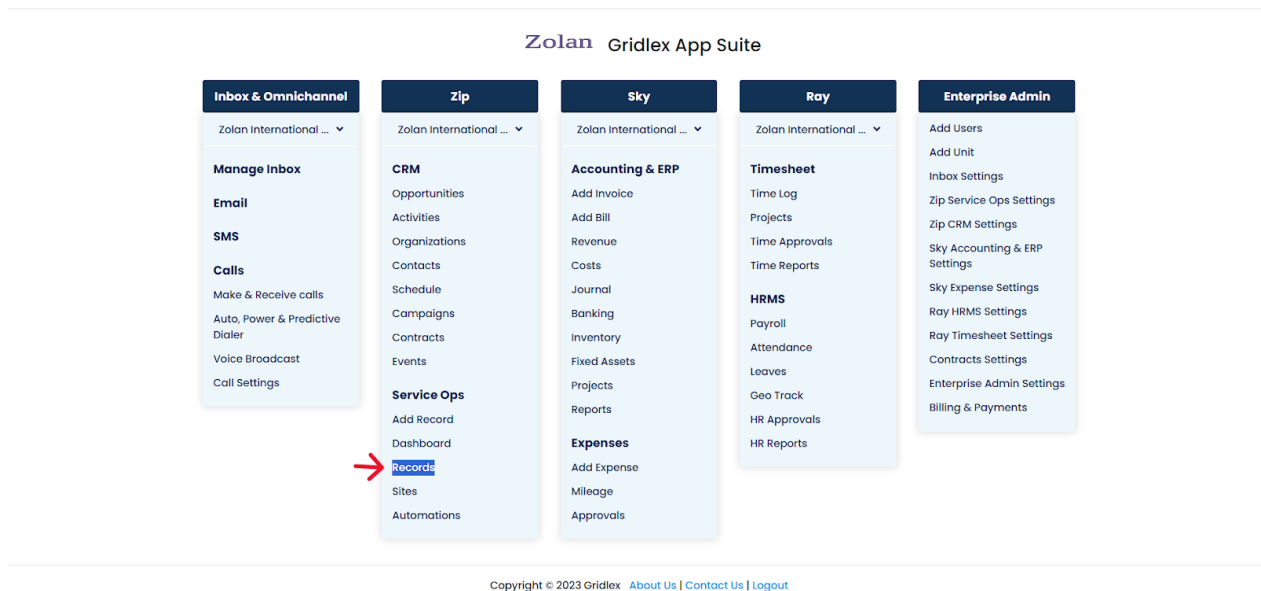
Step 2: Click on the three-dot menu to access column settings. Clicking on it will provide a dropdown of various settings options.

Step 3: From the dropdown, users can sort Records in ascending or descending order based on the selected column. This is handy when you have numerous entries and you want to quickly locate specific ones.

Advanced Features Overview:

1. Managing Columns

In the 'Columns' dropdown, you'll notice checkboxes. Checking these boxes determines which columns are displayed on the page. Once you've made

your selection, click the 'Apply' button to update the listing view. The view will reflect your choices.

Note: If you want to revert to the original settings, there's a 'Reset' button. Click it, and all customizations will be reverted. Remember, if you've already applied changes and want to undo a few, you'll need to manually deselect columns.

Note: Want a specific column at the beginning or the end? Simply drag and drop the column to its new position.

2. Using the Filter Feature

The filter is a powerful tool to streamline your displayed data. Whether you have a keyword, date, or specific criterion, the filter will help you narrow down the list. For example, let's say you're interested in a Record with the subject "Clinical Trial Agreement," enter this keyword in the "Record Subject (Subject)" filter section. Next, specify whether the keyword should match all criteria (AND) or any of the criteria (OR). After setting your conditions, click on the 'Filter' button.

Note: For a fresh start, you can wipe all the set filters with the 'Clear Filters' option.

3. Column Positioning

Some columns are crucial and need to be constantly visible. To achieve this, use the 'Stick Column' function. For instance, if you want Created On' and 'Priority' to be perpetually visible, even while scrolling, stick these columns. Feel like changing which columns are stuck? Use the 'Unstick Column' option to revert them back to their scrollable state.

4. Exporting to Excel

If you need your data offline or in a spreadsheet format for further analysis, the 'Export to Excel' feature is your friend. Click the 'Export to Excel' option. A spreadsheet will be automatically generated and downloaded, mirroring your current listing view, including filters, column choices, and positions.

Additional Features in the Listing View:

1. Column Resizing

Want to see more data within a column or less? You can manually adjust a column's width. Hover over a column's border until your cursor changes, then click and drag to your preferred size.

2. Saving Personalized Views

If you've set up the listing view in a way that suits your workflow, you can save it. Click 'Save View.'

To ensure it remains as the default view to you, select 'Set as Default' and then hit 'Save.'

Congratulations! You have learned how to utilize the Records listing page 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.