

Managing record permissions and notifications is a critical aspect of effective helpdesk operations. Incorrect settings can lead to inefficiencies, unauthorized access, or lapses in communication. Follow this guide to accurately configure record permissions and notifications in Gridlex Zip to ensure the secure and efficient functioning of your helpdesk system.

Step 1: Log in to your Gridlex App Suite account and click the "Zip Service Ops Settings" option under the Enterprise Admin tab.

Step 2: Navigate to the "Models and Workflows Settings" tab and click "Manage Models."

Step 3: Click on the edit icon next to the Model name for which you want to manage permissions and notifications.

Step 4: Scroll to the "Units Permissions & Notifications" section. Navigate to the unit for which you want to manage permissions. Select the check boxes against the permission you want to give.

For instance, here, we want the App marketing unit to have all permissions, so we checked all the boxes.

Step 5: Next, scroll down to the notifications section. Follow the same process as outlined in the previous step.

Here, we wanted all members of the app marketing unit to receive email notifications when a record is created using this Model but not when there is a status change.

Step 6: If you want to assign permissions and enable notifications for the next unit, click the arrow to expand the list and repeat the above step. Once you are done, click “Update.”

Step 7: Go to the “Model Notifications” section and select the notifications you want to enable.

Step 8: Scroll to the “Notifications to Email Address associated with the record” section and select the notifications you want to enable. Once done, click “Update.”

Step 9: Next, go to the “Status, Label, Priority, and Channel Permission” section. Here, you can assign permissions to update, view, and work on & process the fields, like status, label priority, etc., of the records created with this model.

Step 10: From the “Choose Permission” drop-down, select “Can Update Specific Status.” Then the “Choose Field” drop-down appears; here, you can select the “Status.”

Note: Here, you can only select the “Status” field because the update future fields permission can only be assigned to the status field. The other fields cannot be selected when you are assigning this permission.

Step 11: When you select a status in the “From Status” tab, you give permission to the unit to update the record's status from that point forward.

For instance, here, the unit can only update the status when the record is in the status "Initial Inquiry." They can only change the status to "Investigation," "Solution," or "Follow Up" but not to "Form Submitted."

Step 12: Now select the unit you want to have this permission. Once done, click "Update."

Note: You can select multiple units here.

Step 13: To add more permissions, click on "Add New Permission."

Step 14: Now select "View Records For Following Fields" and select any of the fields like Status, Label, Priority, or Channel.

Step 15: Select the label, add the unit you want to give this permission to and click "Update."

In this example, this permission allows the Marketing unit to view all the records with the label "Bugs."

Step 16: Next, click "Add New Permission," then select "Work & Process For Following Fields." You can choose fields like Status, Label, Priority, or Channel here.

Note: The Work & Process permission allows units to update the records related to those fields.

Step 17: Select the priority, add the unit you want to give this permission to and click “Update.”

In this example, this permission allows the Marketing unit to work on and process all the records with critical priority. It also allows the unit to update records that are in the “Solution” status.

Congratulations! You have learned how to manage record permissions and notifications 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.