

Once a record is created, multiple conversations may ensue, such as updates on record status, requests for additional information, or other relevant discussions. So, how can you effectively monitor these communications? The email communications feature in records allows you to seamlessly manage and view all associated email interactions for a specific record. Refer to this guide to learn how to manage your email communications within records on the Gridlex platform.

Step 1: Log in to your Gridlex App Suite account and click on the "Records" option under the Zip tab.

Step 2: Click on the Record ID or Record Subject of the record you want to view communications for.

Step 3: Click on the "Communication" tab to view the previous email communications for this record.

Step 4: Click on the email thread you want to view.

Step 5: Now, you can view the communication of your selected email thread. You can reply to or forward the email by clicking on "Reply" and "Reply all" or "Forward."

Note: Whenever you want to view email communications, you can come to this tab and access them.

Step 6: If you want to start a new conversation, hover over the "Communication" tab and click "New Conversation" to create a new email thread.

Step 7: Now you can draft your email, and once done, click “Send.”

Note: While drafting your email, don't change the record subject; changing it will create a new record.

This will create a new thread, which you can view in the Communications tab.

Congratulations! You have learned how to utilize email communications in Records 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.