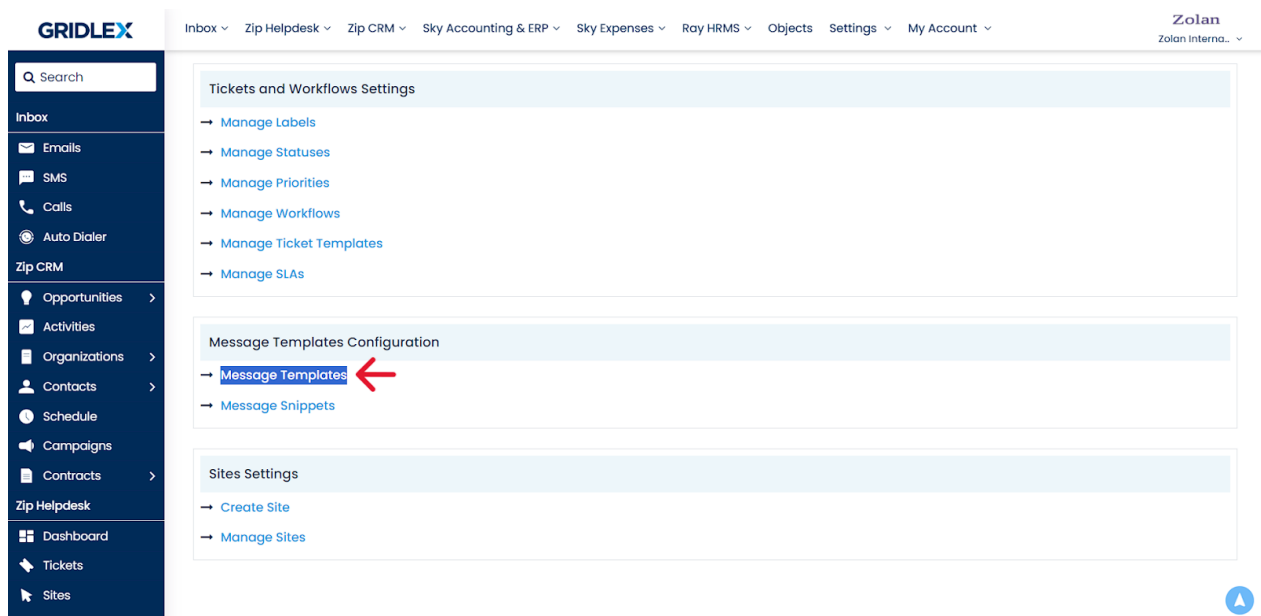


How to Create and Map Message Templates in Gridlex Zip?

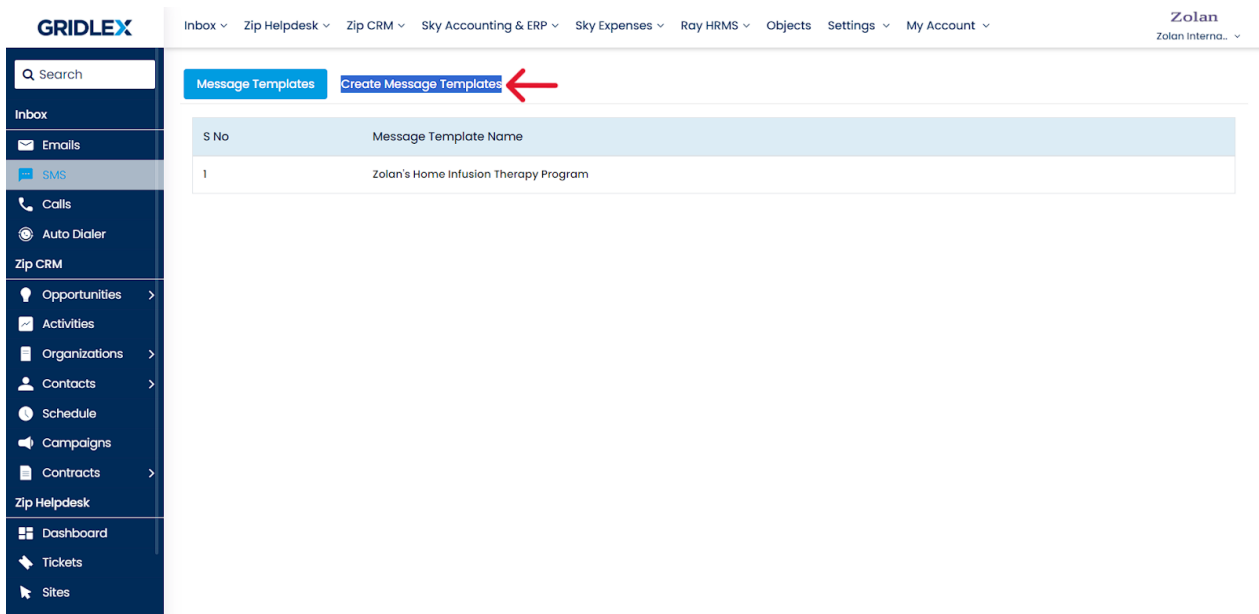
Step 1: Log in to the Gridlex App Suite and click 'Zip Helpdesk Settings' under the Enterprise Admin section.



Step 2: Click 'Message Templates' under Message Templates Configuration.



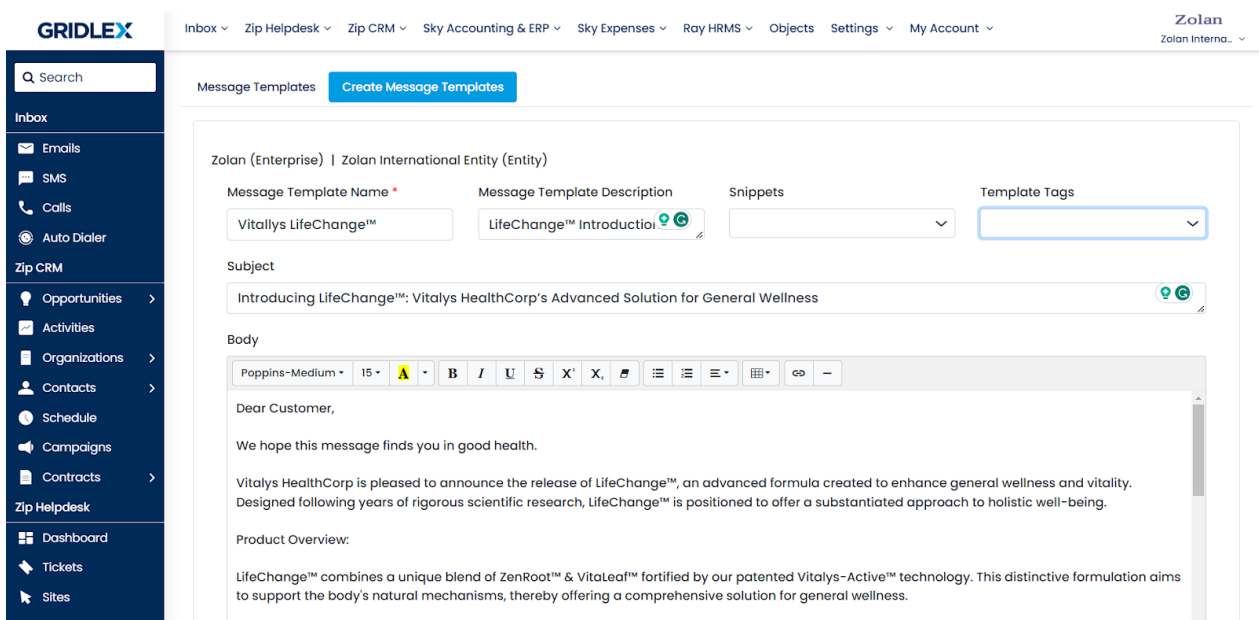
Step 3: Click 'Create Message Template'



The screenshot shows the GRIDLEX dashboard. The left sidebar contains navigation links for Inbox, Emails, SMS, Calls, Auto Dialer, Zip CRM, Opportunities, Activities, Organizations, Contacts, Schedule, Campaigns, Contracts, Zip Helpdesk, Dashboard, Tickets, and Sites. The top navigation bar includes links for Inbox, Zip Helpdesk, Zip CRM, Sky Accounting & ERP, Sky Expenses, Ray HRMS, Objects, Settings, and My Account. The main content area displays a table with columns 'S No' and 'Message Template Name'. A red arrow points to the 'Create Message Templates' button in the top navigation bar.

S No	Message Template Name
1	Zolan's Home Infusion Therapy Program

Step 4: Enter the Message Template Name, Subject, and Body in the corresponding fields.



The screenshot shows the 'Create Message Template' form in the GRIDLEX dashboard. The form includes fields for 'Message Template Name', 'Message Template Description', 'Snippets', and 'Template Tags'. The 'Message Template Name' field contains 'Vitallys LifeChange™'. The 'Message Template Description' field contains 'LifeChange™ Introduction'. The 'Subject' field contains 'Introducing LifeChange™: Vitalys HealthCorp's Advanced Solution for General Wellness'. The 'Body' field contains the following text:

Dear Customer,

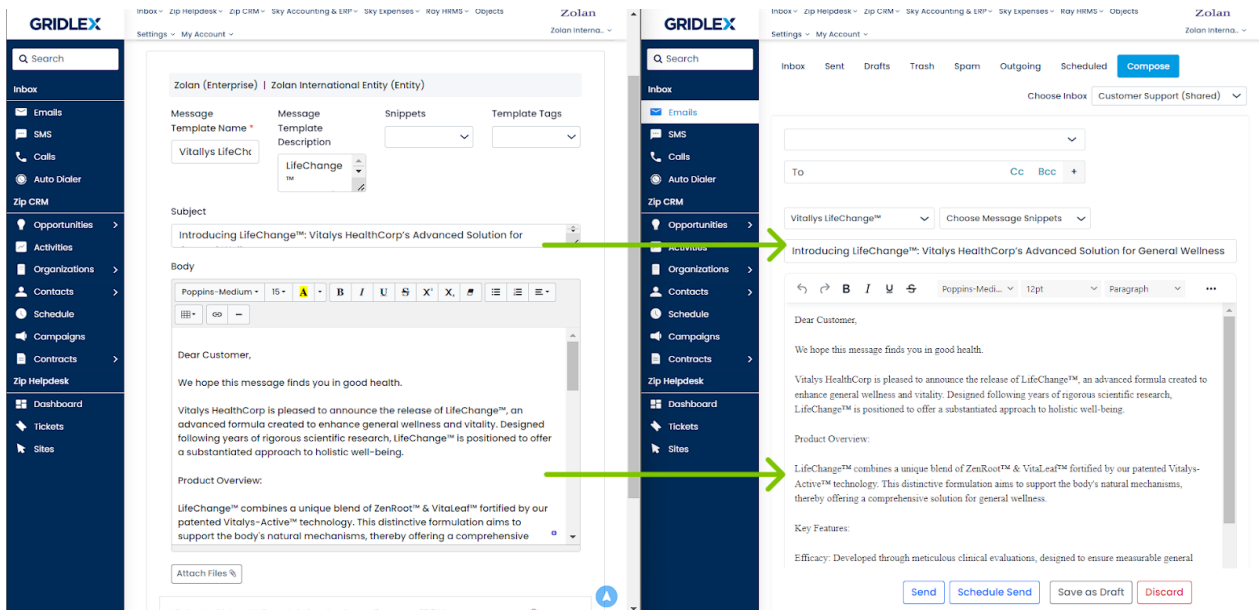
We hope this message finds you in good health.

Vitalys HealthCorp is pleased to announce the release of LifeChange™, an advanced formula created to enhance general wellness and vitality. Designed following years of rigorous scientific research, LifeChange™ is positioned to offer a substantiated approach to holistic well-being.

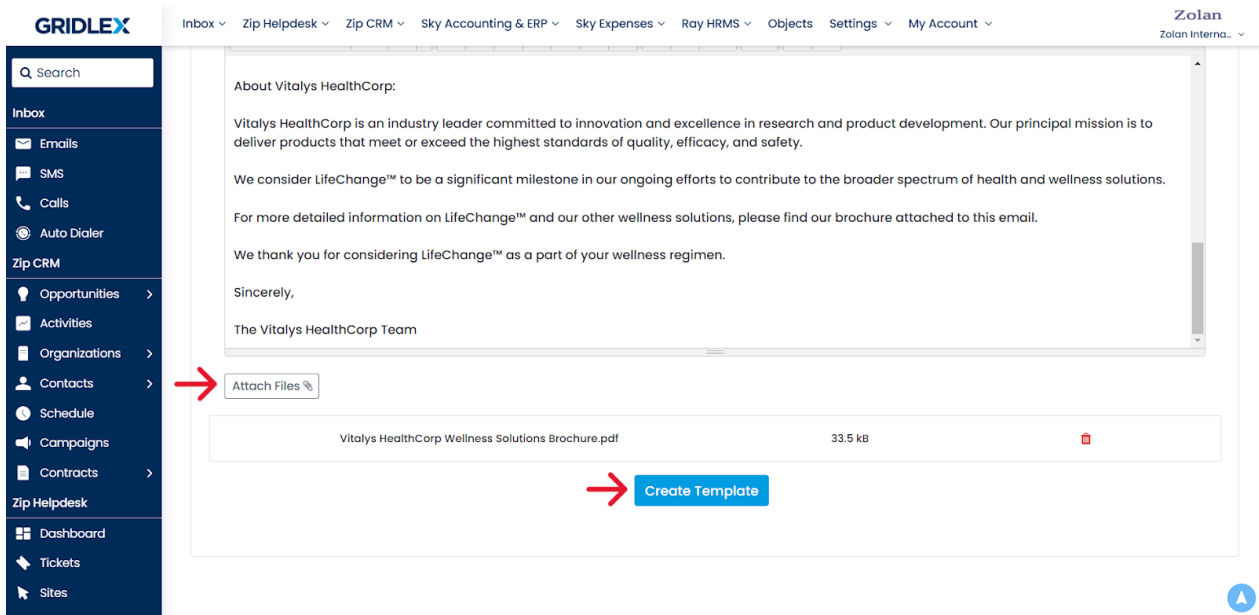
Product Overview:

LifeChange™ combines a unique blend of ZenRoot™ & VitaLeaf™ fortified by our patented Vitalys-Active™ technology. This distinctive formulation aims to support the body's natural mechanisms, thereby offering a comprehensive solution for general wellness.

The subject will be imported as the email subject, and the Body will be imported as the email body (See below)

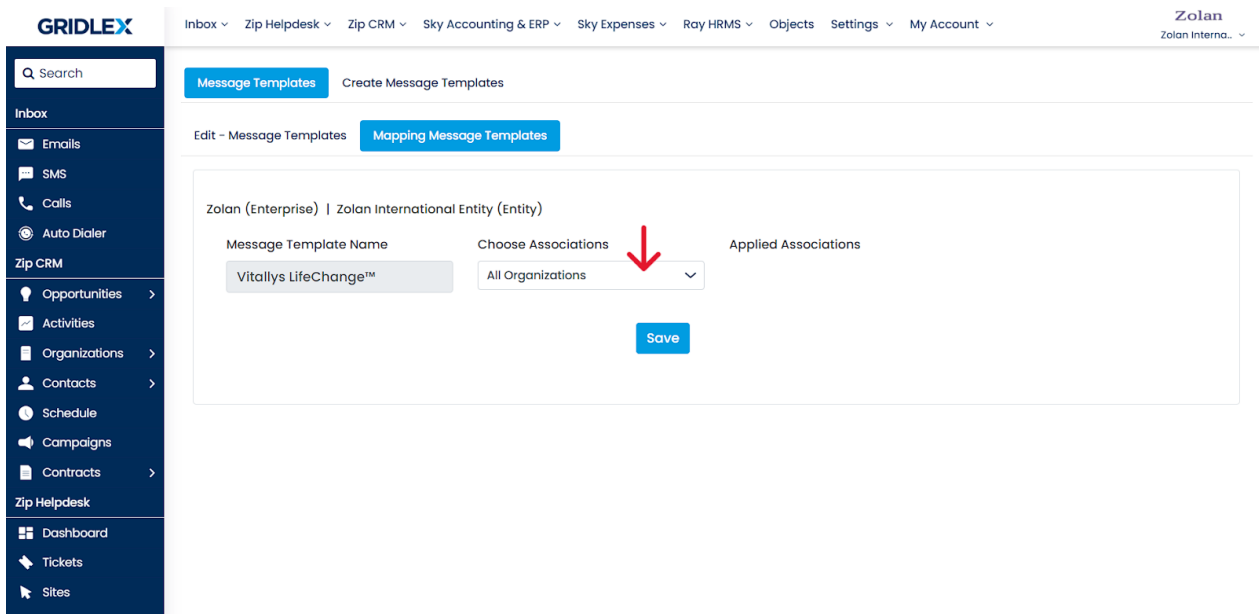


Step 5: Scroll down and click 'Attach Files' to add an attachment. Click 'Create Template.' You'll now be redirected to the message templates mapping page.



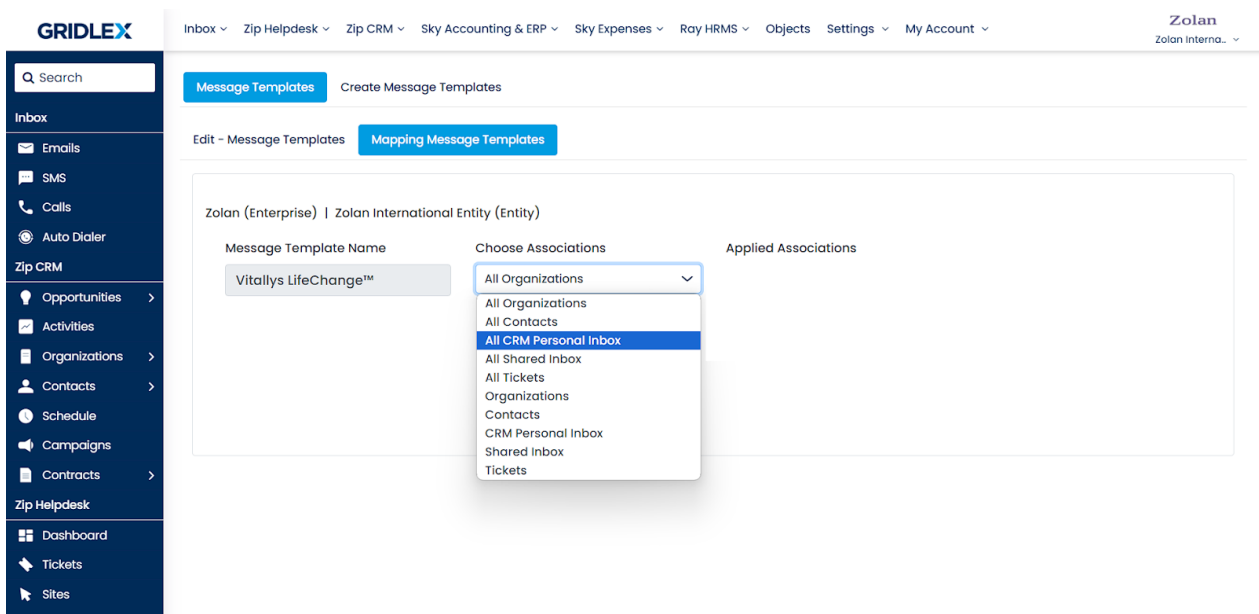
Mapping Message Templates:

Step 6: Click the dropdown under Choose Associations.



Step 7: Choose the association to which you want to map the message template.

You can either map specific Organizations, Contacts, CRM Personal Inboxes, Shared Inboxes, OR all of them.



Step 8: Click 'Save' once you're done

GRIDLEX

Inbox ▾ Zip Helpdesk ▾ 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 >

Zip Helpdesk

- Dashboard
- Tickets
- Sites

Message Templates Create Message Templates

Edit - Message Templates **Mapping Message Templates**

Zolan (Enterprise) | Zolan International Entity (Entity)

Message Template Name: Vitallys LifeChange™

Choose Associations: All CRM Personal Inbox ▾

Applied Associations:

Save

You can see what associations you mapped under the 'Applied Associations' section.

GRIDLEX

Inbox ▾ Zip Helpdesk ▾ Zip CRM ▾ Sky Accounting & ERP ▾ Sky Expenses ▾ Ray HRMS ▾ Objects ▾ Settings ▾ My Account ▾

Zolan
Zolan Interna. ▾

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- Sites

Message Templates Create Message Templates

Edit - Message Templates **Mapping Message Templates**

Zolan (Enterprise) | Zolan International Entity (Entity)

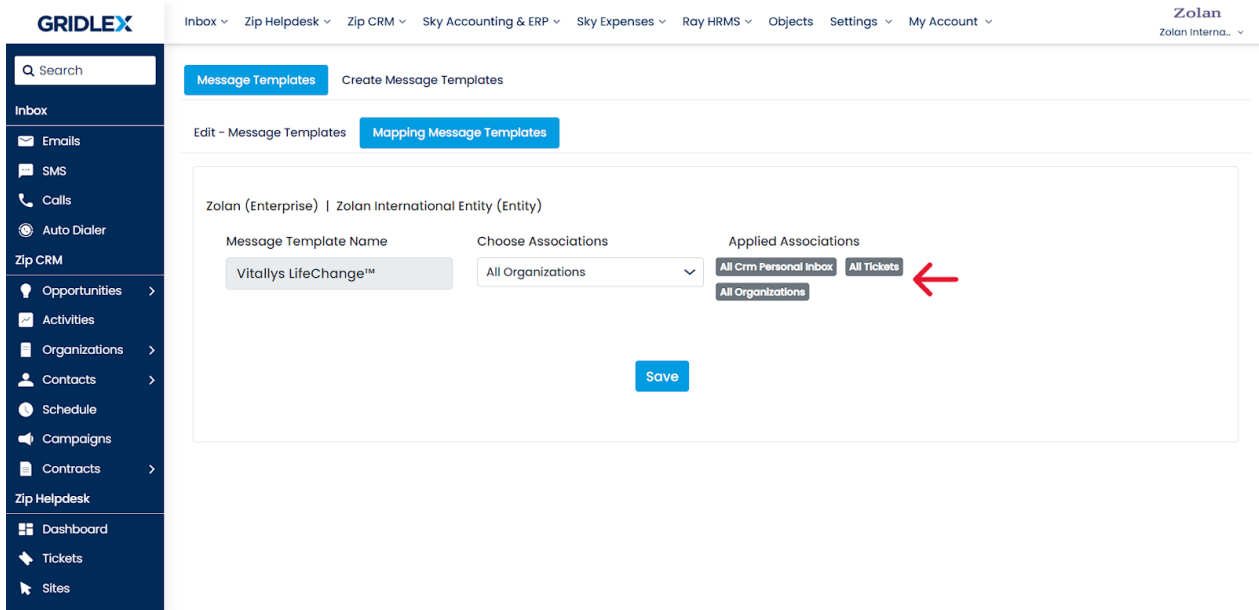
Message Template Name: Vitallys LifeChange™

Choose Associations: All CRM Personal Inbox ▾

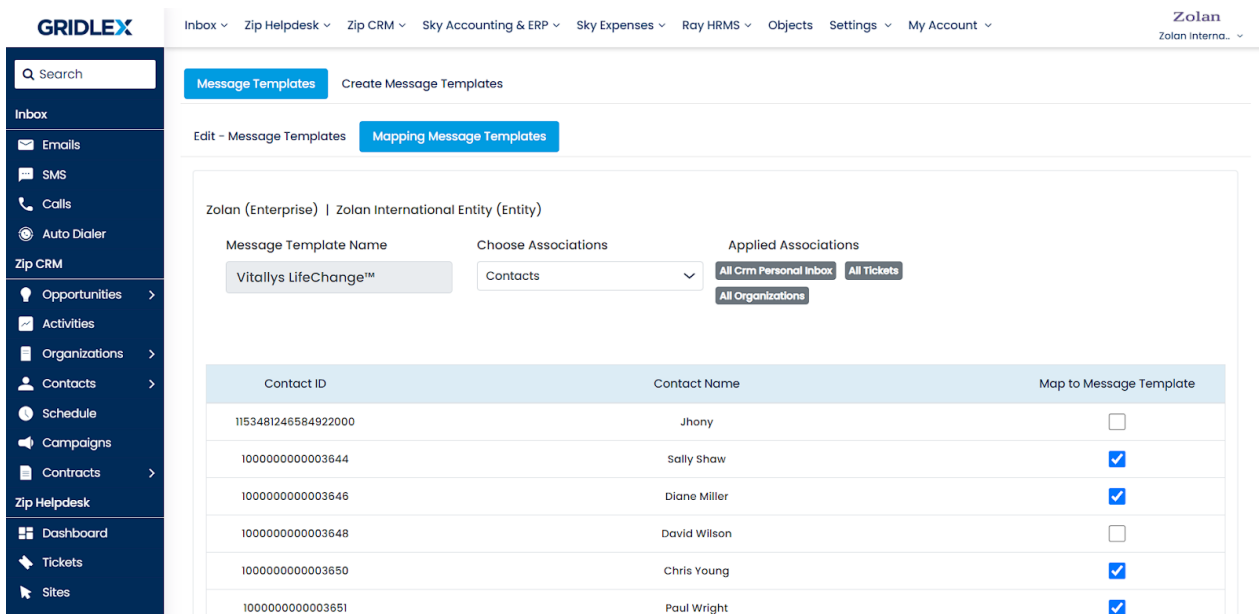
Applied Associations: All Crm Personal Inbox

Save

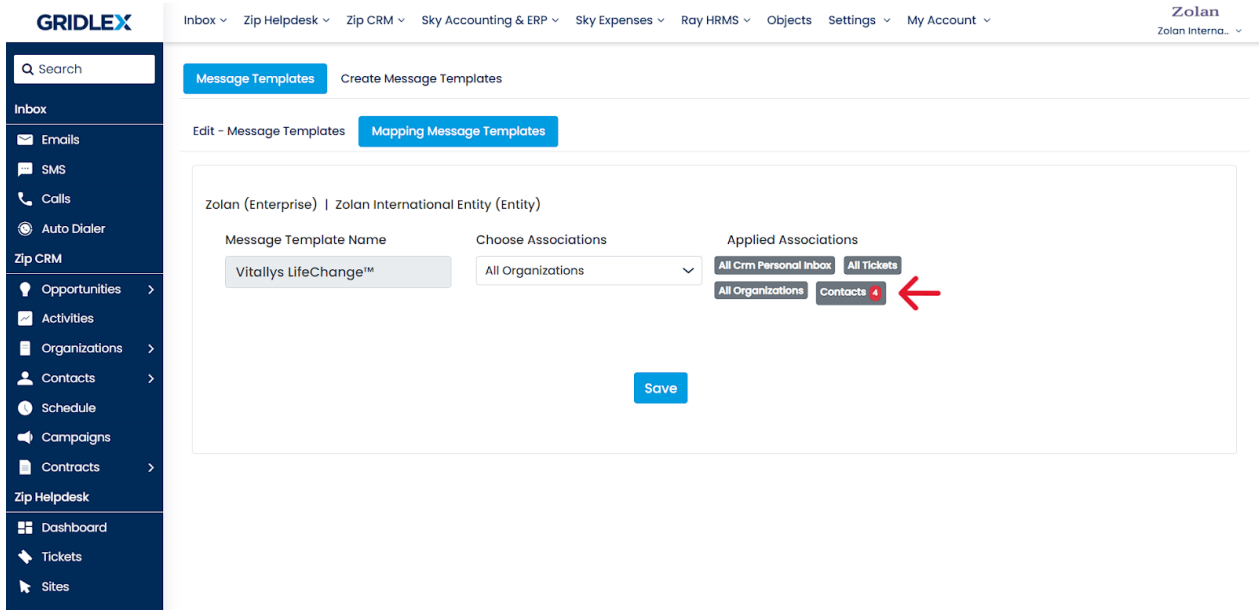
Repeat Step 7 and Step 8 to map more associations if you wish. (See below)



To map specific Organizations, Contacts, CRM Personal Inboxes or Shared Inboxes, select the corresponding association in the dropdown and check the boxes against those associations to which you wish to map the template. We're using Contacts here as an example. Click 'Save' once you're done (See example below)



You can see how many contacts you have mapped the template to under the 'Applied Associations' section.



Congratulations! You have now learned how to create message templates in Gridlex Zip.

Please refer to this guide on using message templates: [How to Use Message Templates in Emails 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.