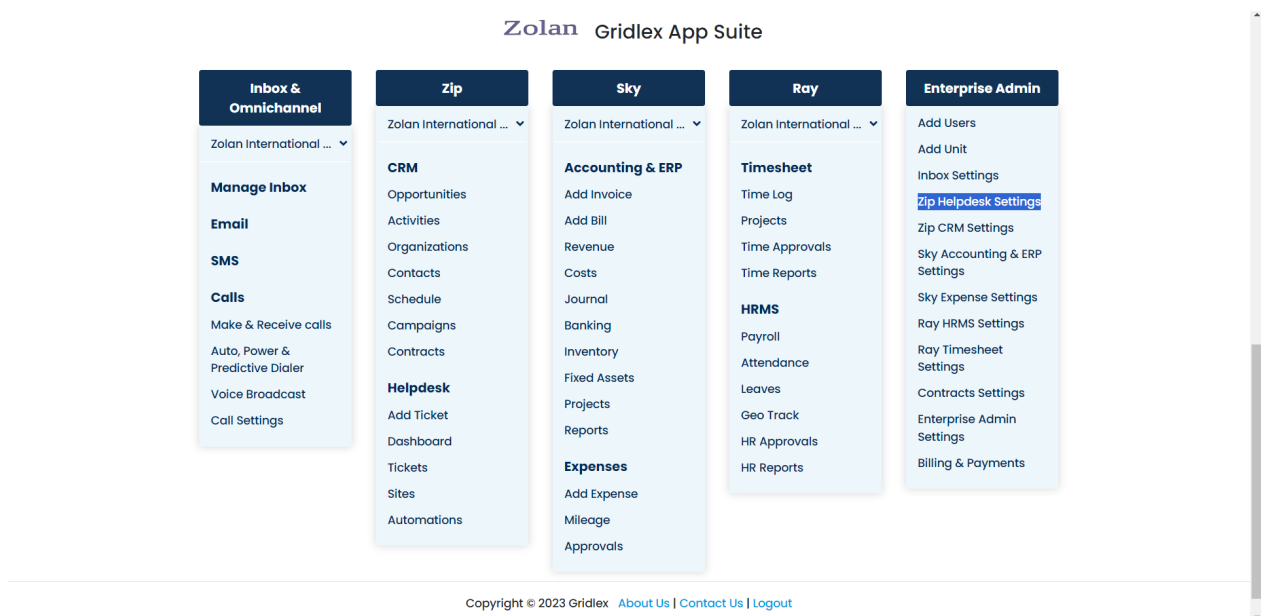


In Gridlex Zip, users have the flexibility to create multiple inboxes allowing you to categorize and separate support requests based on different criteria, such as departments or customer segments; this makes it easier to manage and prioritize support requests.

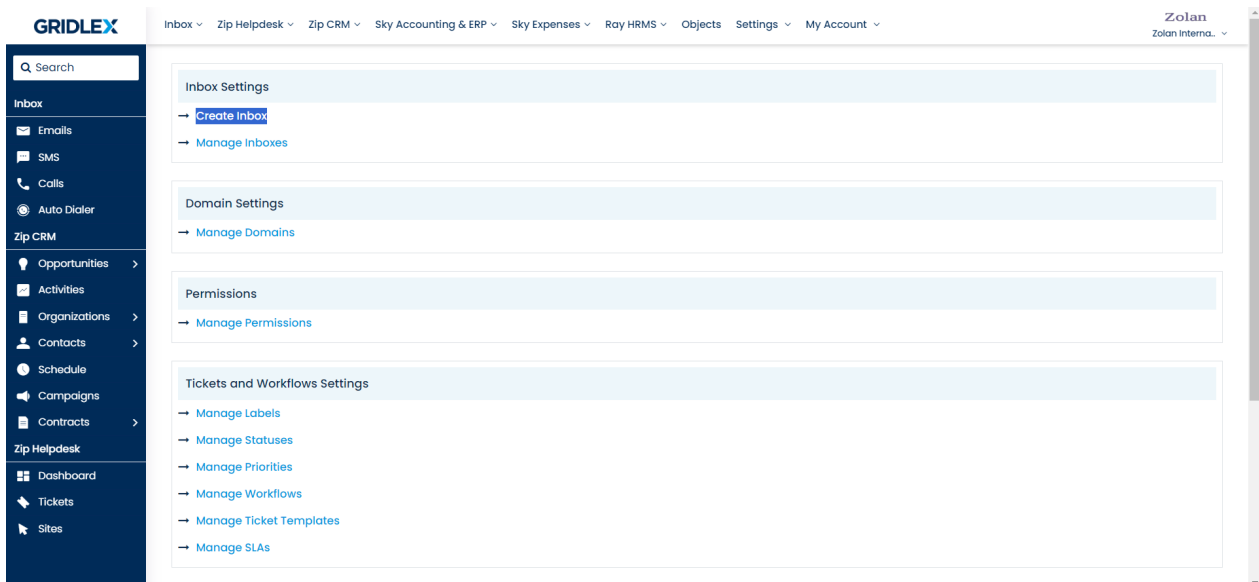
In addition, managing multiple inboxes from one centralized location can help you streamline your customer support processes, increase your team's efficiency, and provide valuable insights into your customer support performance. By consolidating all your email accounts into one platform, you can respond to customer inquiries more quickly and effectively without constantly switching between different email accounts.

Follow the steps below to create an inbox, manage email connections, and set inbox permissions in Gridlex Zip.

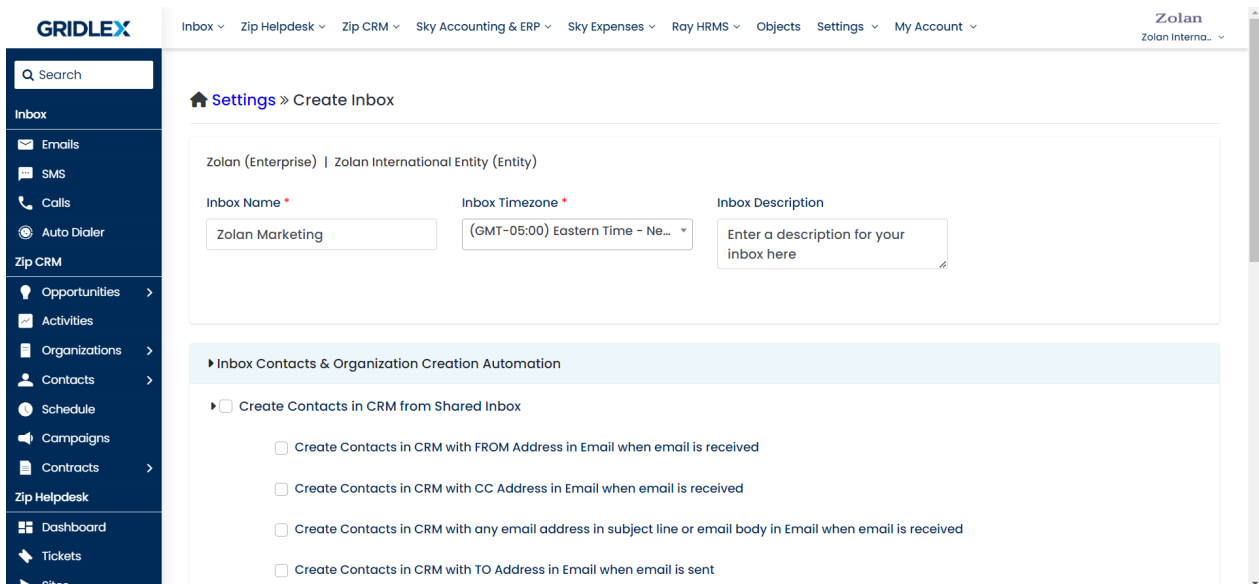
Step 1: Log in to the Gridlex App Suite and click 'Zip Helpdesk Settings' under the Enterprise Admin section in the navigation menu.



Step 2: Click on 'Create Inbox' under the Inbox Settings section. You will now be directed to the inbox creation page.



Step 3: Enter the desired inbox name, select the inbox time zone, and add a description for the inbox (optional). Once done, scroll down.



Step 4: Here, you can define rules for automatically adding contacts to the CRM. Check all the boxes that match your desired criteria. Continue scrolling down to finish setting up.

Inbox Contacts & Organization Creation Automation

▶ **Create Contacts in CRM from Shared Inbox**

- ☒ Create Contacts in CRM with FROM Address in Email when email is received
- ☐ Create Contacts in CRM with CC Address in Email when email is received
- ☒ Create Contacts in CRM with any email address in subject line or email body in Email when email is received
- ☐ Create Contacts in CRM with TO Address in Email when email is sent
- ☐ Create Contacts in CRM with CC Address in Email when email is sent
- ☐ Create Contacts in CRM with BCC Address in Email when email is sent
- ☒ Create Contacts in CRM with any email address in subject line or email body in Email when email is sent
- ☒ Create Contacts in CRM with TO Address in Email when email is received

Step 5: In this section, you can set rules for automatically adding organizations to the CRM. Choose the desired criteria and click 'Create' to finalize. Now you have successfully created an Inbox in Gridlex Zip.

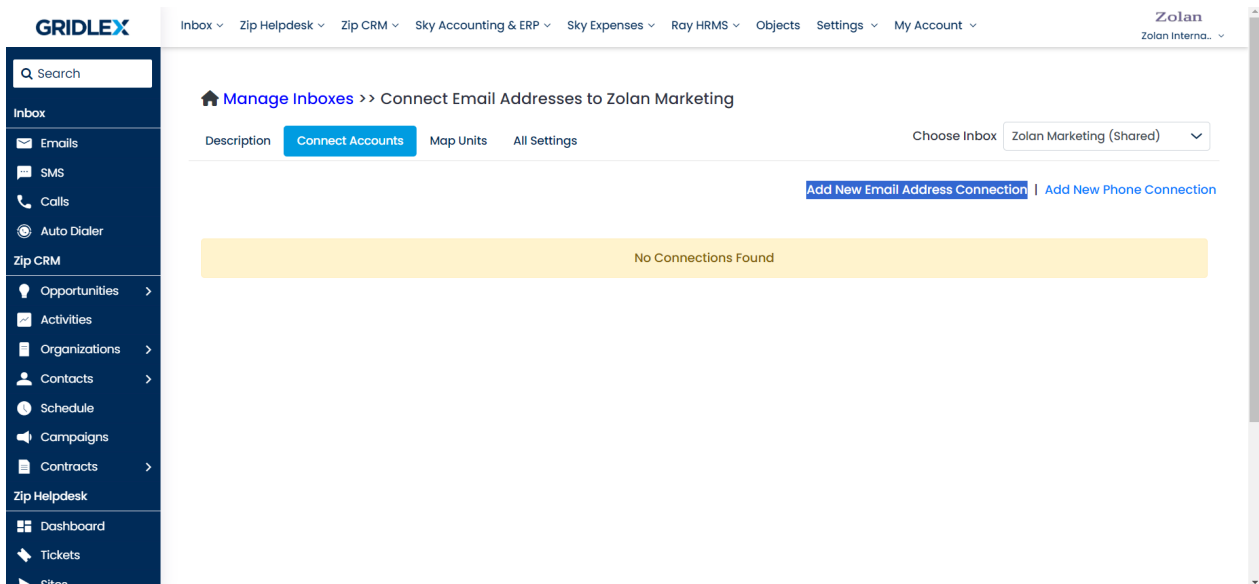
GRIDLEX | Inbox ▾ | Zip Helpdesk ▾ | Zip CRM ▾ | Sky Accounting & ERP ▾ | Sky Expenses ▾ | Ray HRMS ▾ | Objects | Settings ▾ | My Account ▾ | **Zolan** | Zolan Interna... ▾

▶ **Create Organizations with based on Email Domain (e.g. Acme.com Organization will be created when john@acme.com is in the From, To, CC, BCC fields) in CRM**

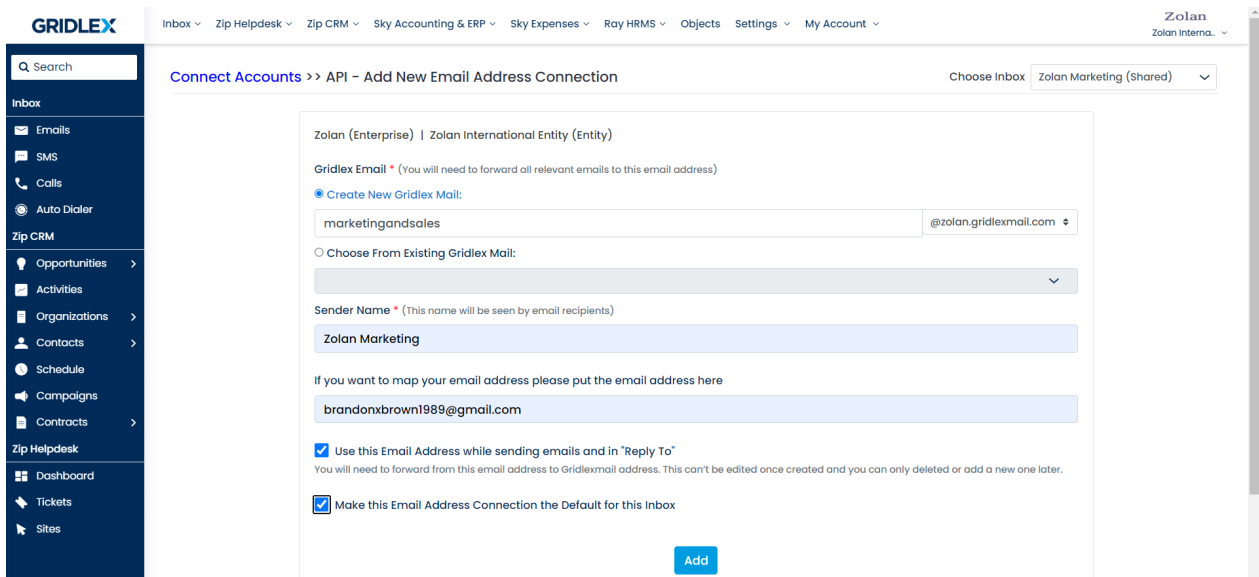
- ☒ Create Organizations with email domain in CRM when contact email address is in FROM Address in Email when email is received
- ☐ Create Organizations with email domain in CRM when contact email address is in CC Address in Email when email is received
- ☐ Create Organizations with email domain in CRM when contact email address is in Email Subject or Body in Email when email is received
- ☐ Create Organizations with email domain in CRM when contact email address is in FROM Address in Email when email is sent
- ☐ Create Organizations with email domain in CRM when contact email address is in CC Address in Email when email is sent
- ☒ Create Organizations with email domain in CRM when contact email address is in BCC Address in Email when email is sent
- ☐ Create Organizations with email domain in CRM when contact email address is in Email Subject or Body in Email when email is sent
- ☐ Create Organizations with email domain in CRM when contact email address is in TO Address in Email when email is received
- ☒ Create Organizations with email domain in CRM when contact email address is in TO Address in Email when email is sent

Create

Step 6: Upon completion of 'Step 5' you'll be redirected to the Email Connection page. Click on 'Add New Email Address Connection' to add your email connection.



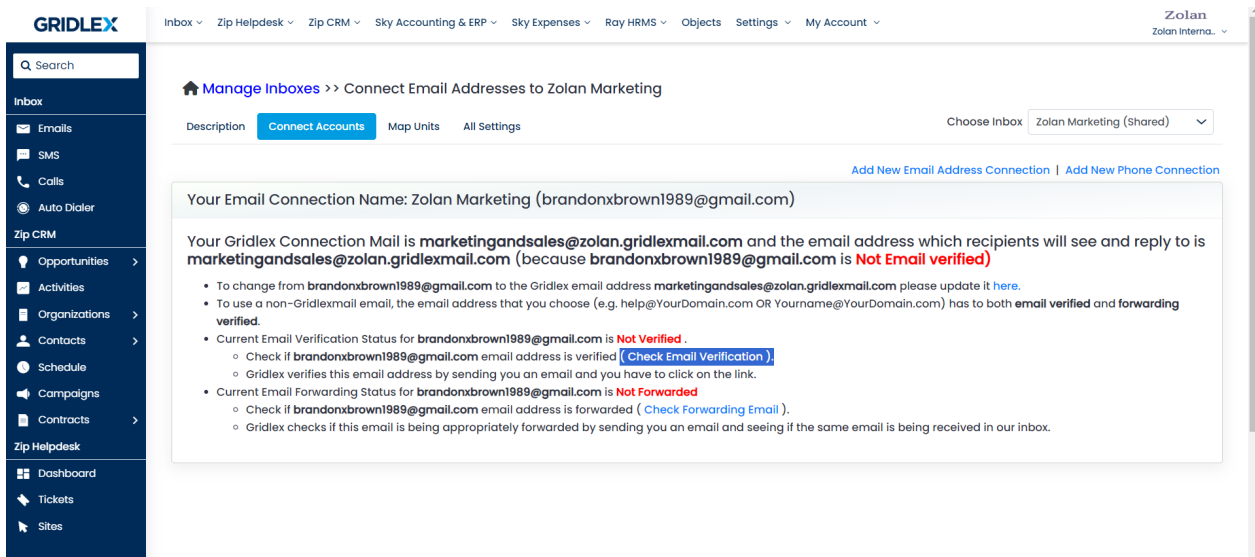
Step 7: Choose between creating a new Gridlex Mail address or selecting an existing one.



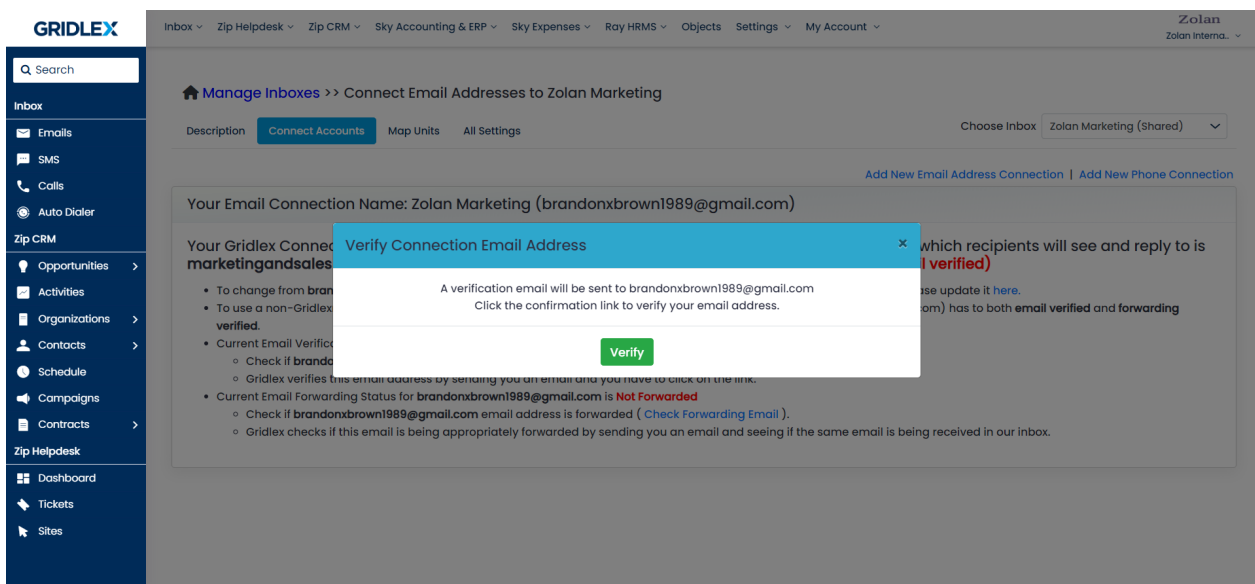
Fill in the desired email address and sender name. If mapping your email, enter your address in the given field. Check the necessary boxes and click on 'Add'.

Note: For utilizing a non-Gridlex mail, your chosen email address (e.g., help@YourDomain.com OR Yourname@YourDomain.com) should undergo a verification process. The subsequent steps will guide you through this procedure.

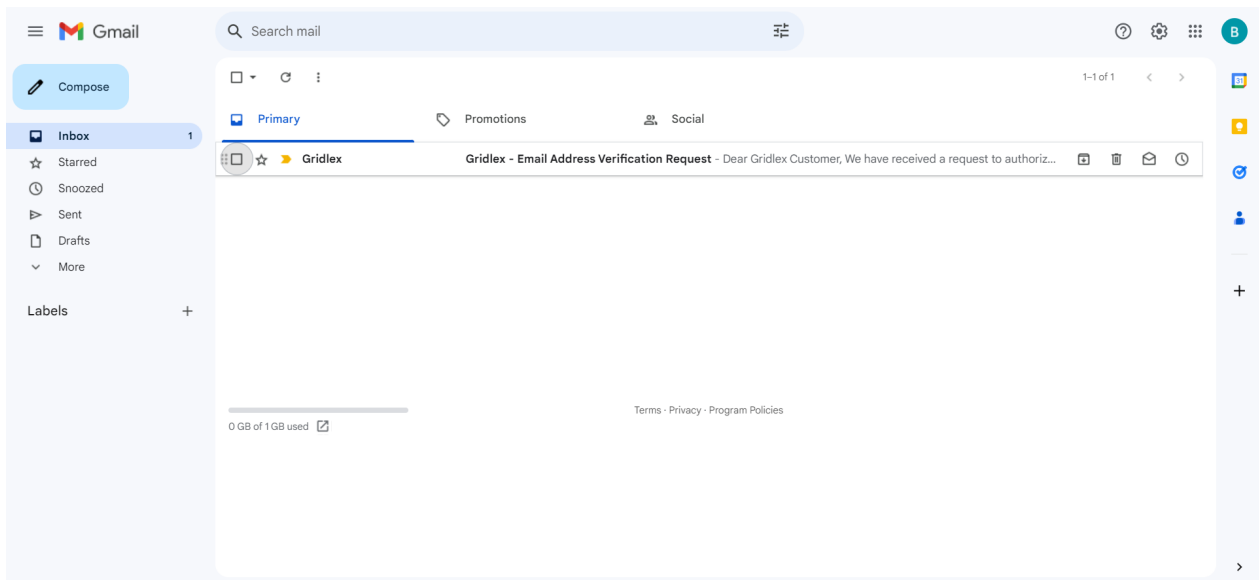
Step 8: Click 'Check Email Verification'



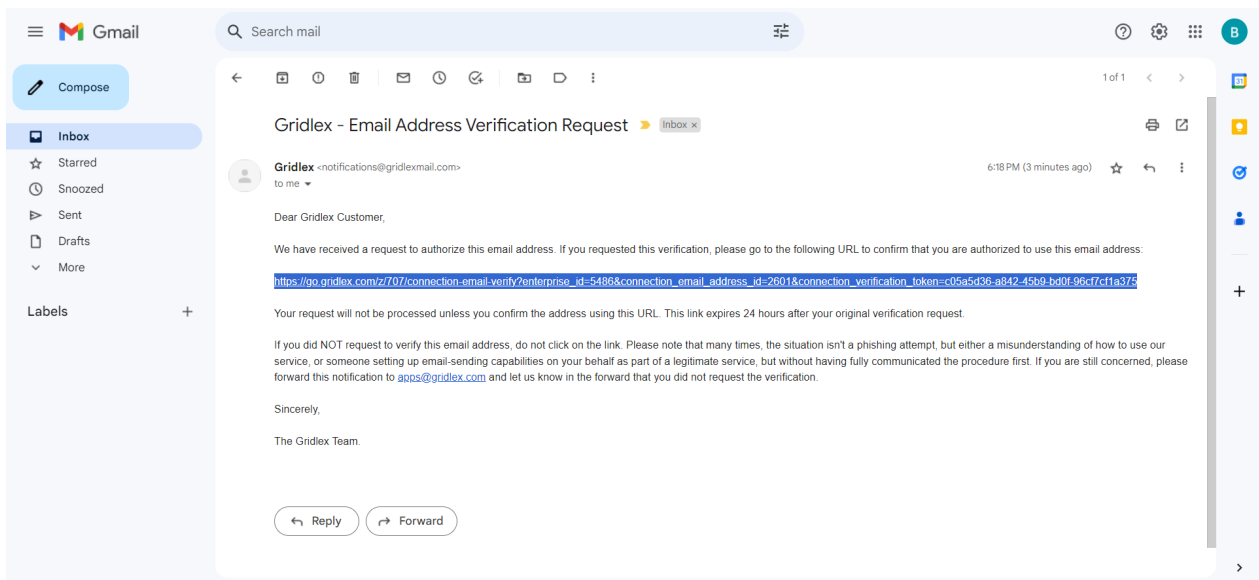
Step 9: Click 'Verify.' An email containing the verification link will be sent to your email address.



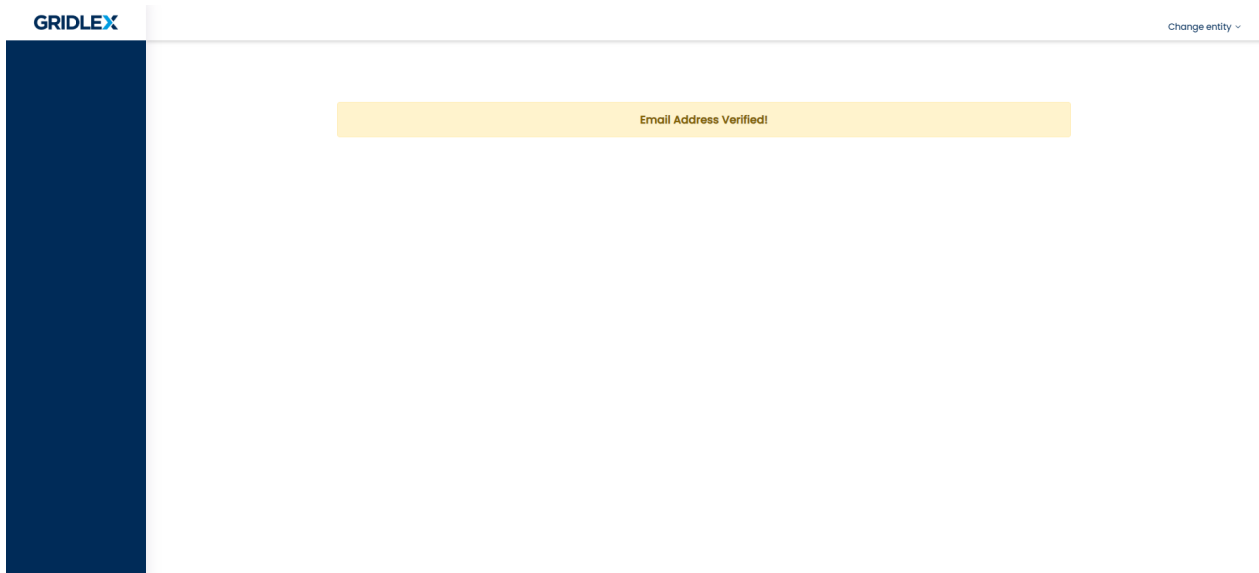
Step 10: Open your email, and find the verification mail to complete the process.



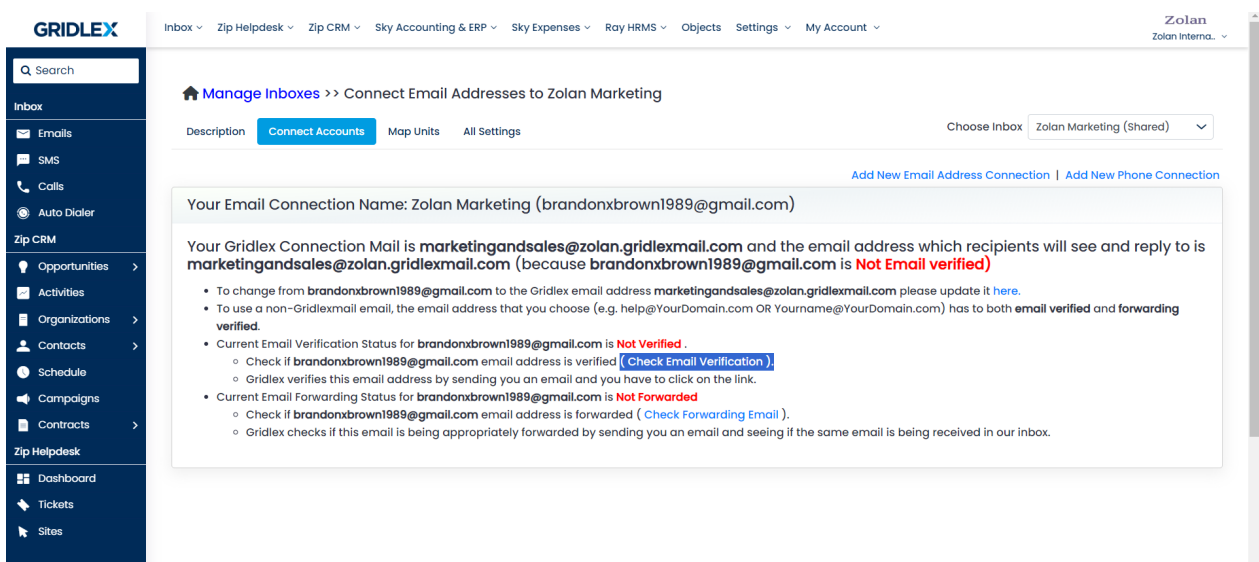
Step 11: Click the link in the mail



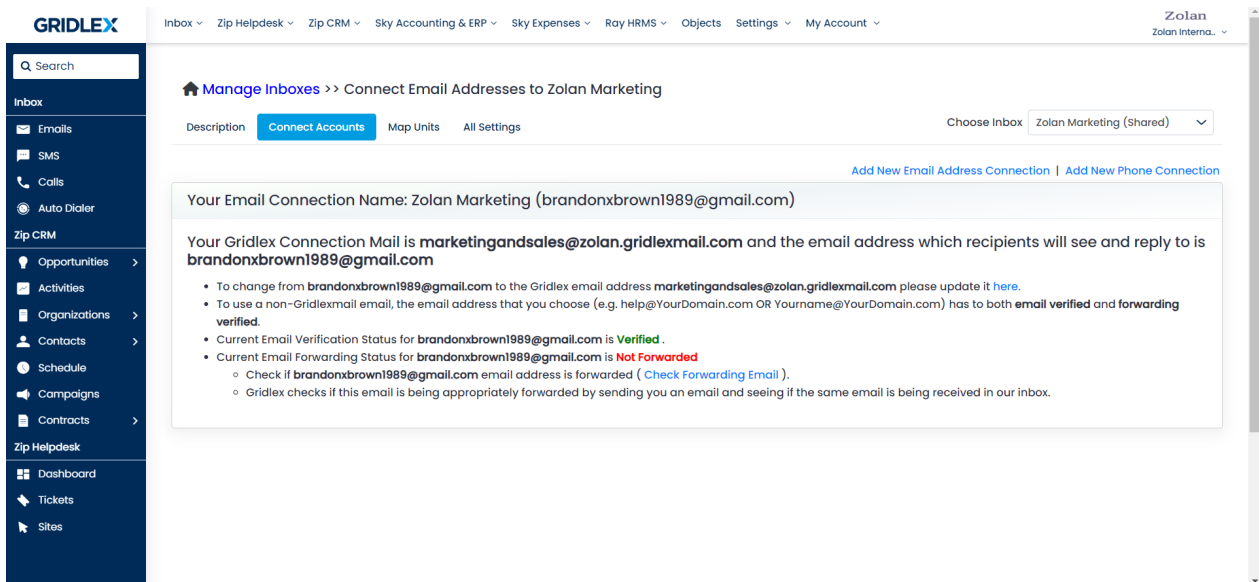
Step 12: You'll be redirected to the email verification status page. Once you see "Email Address Verified!" message, you can close this page and continue with the next step.



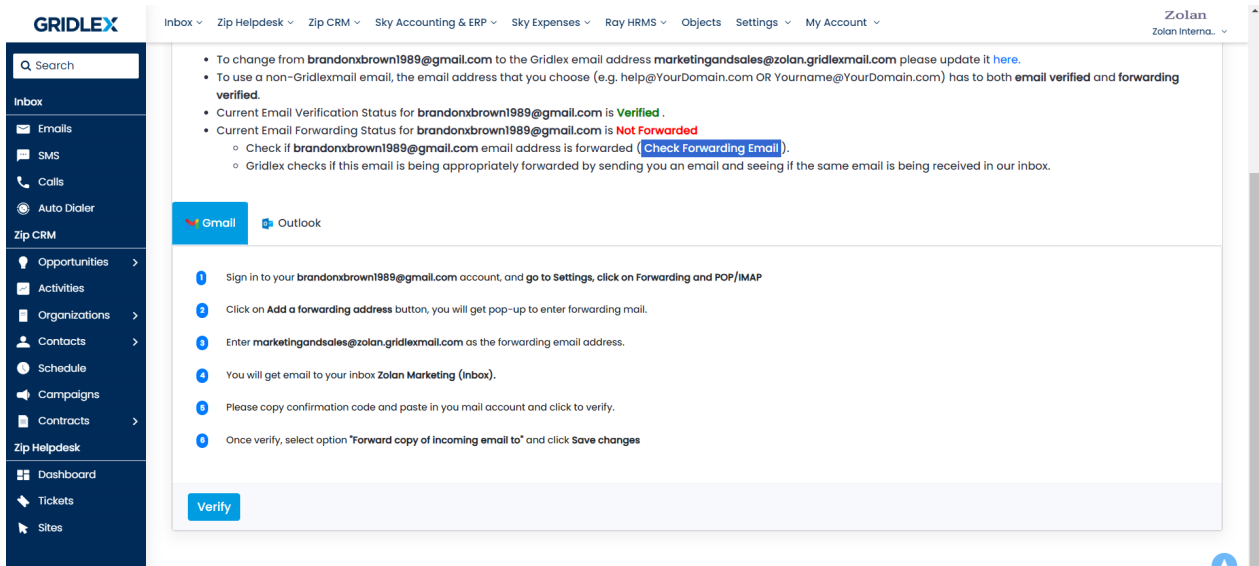
Step 13: On this page, hit the reload button.



Step 14: You will now see that your email address is verified.

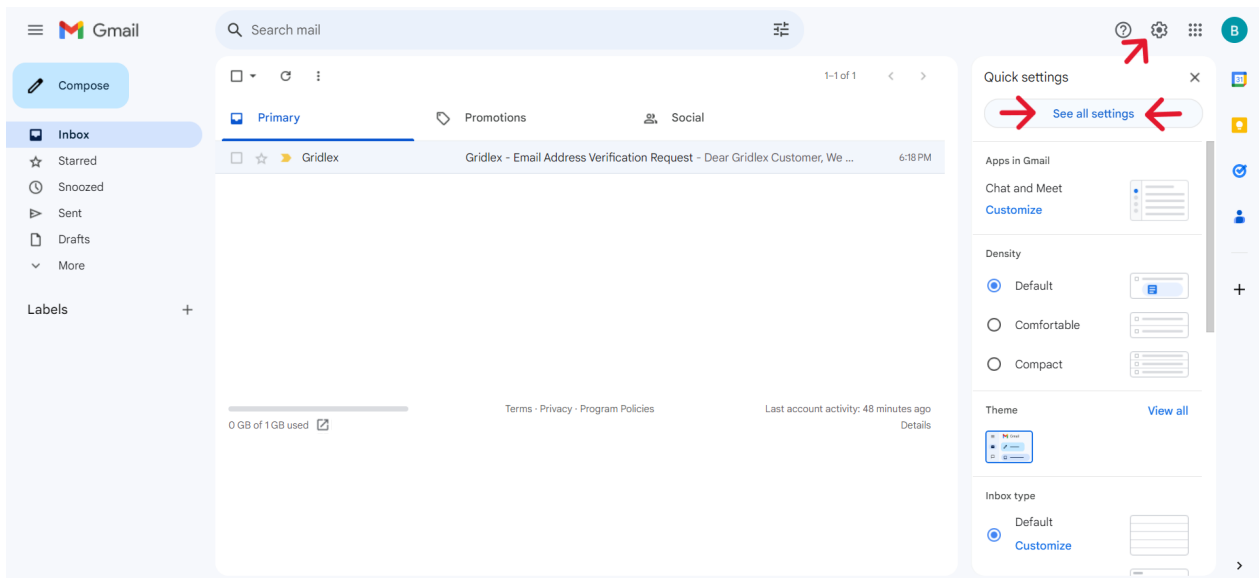


Step 15: Click 'Check Forwarding Email'. This will trigger the instructions on how to add a forwarding email address.

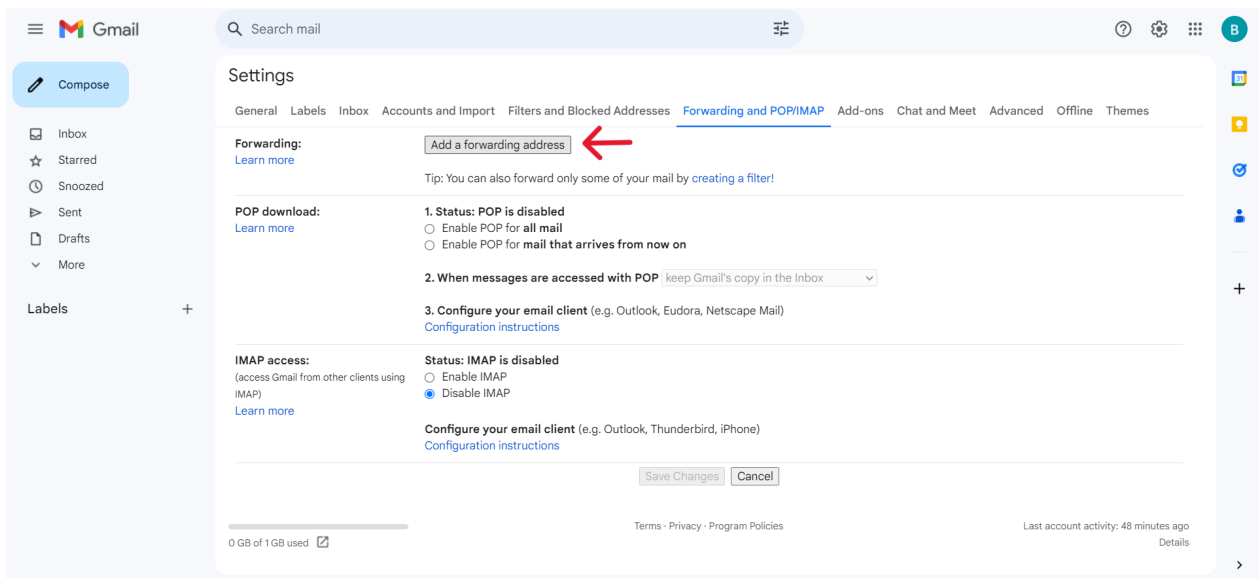


Note: The following instructions are an example of setting up email forwarding for Gmail users. You can skip to Step 26 once you have set up forwarding, to see the status.

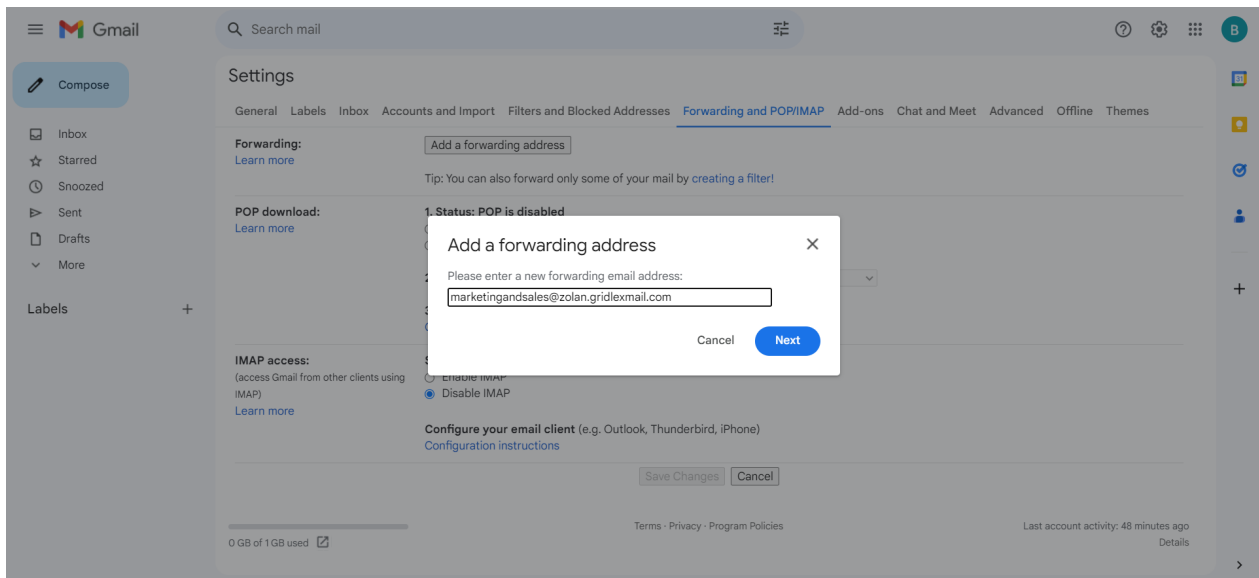
Step 16: Go to your Gmail, and go into settings.



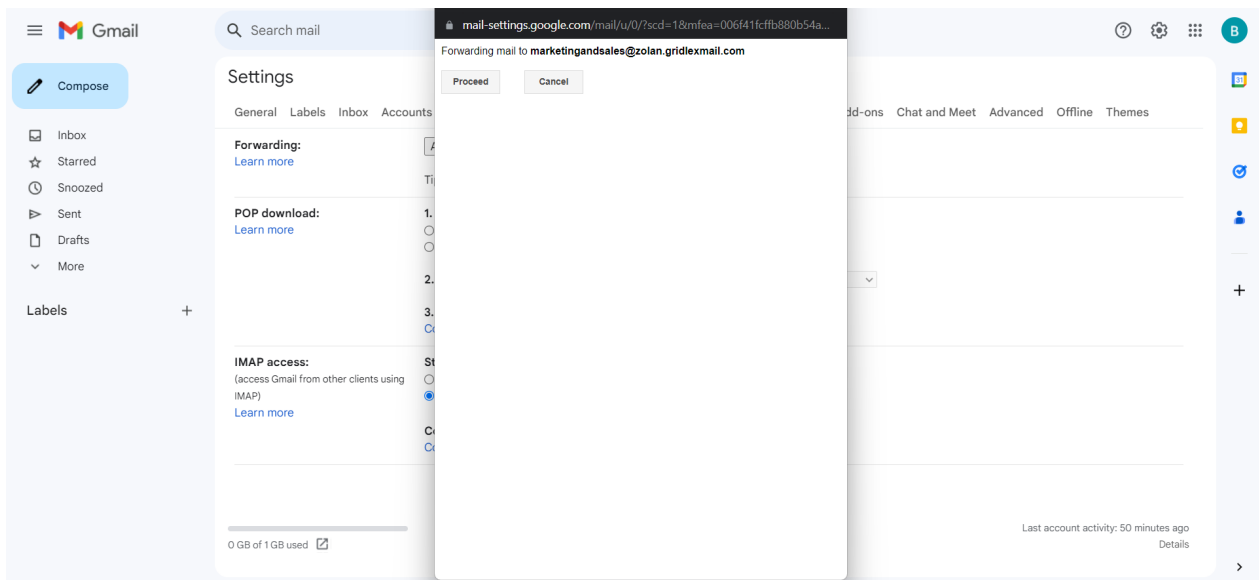
Step 17: Click 'Add a forwarding address.'



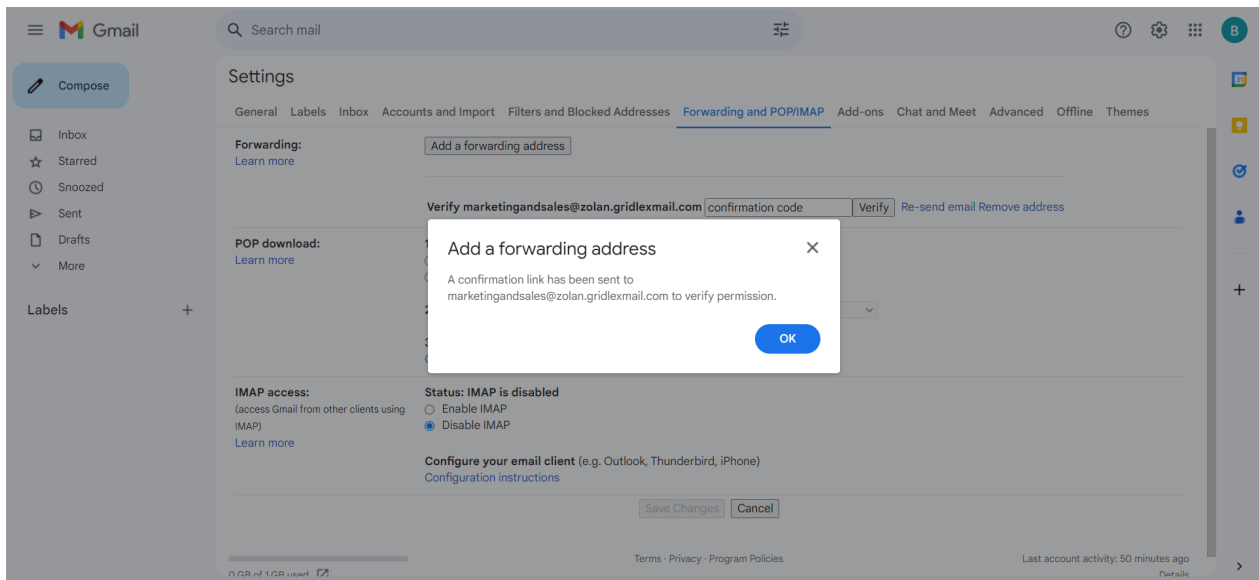
Step 18: Enter your Gridlex Mail address here and click 'Next'



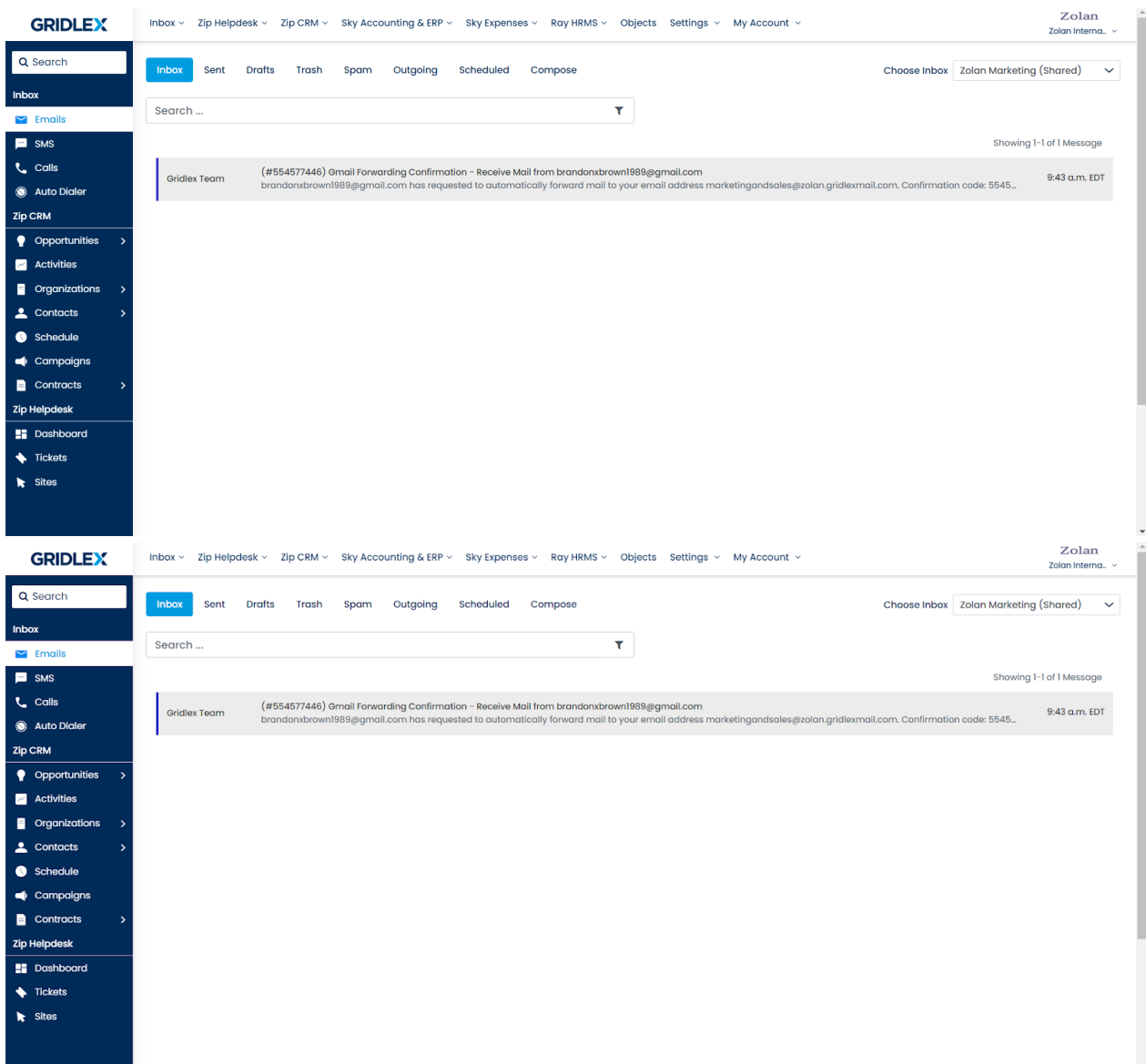
Step 19: Click 'Proceed.'



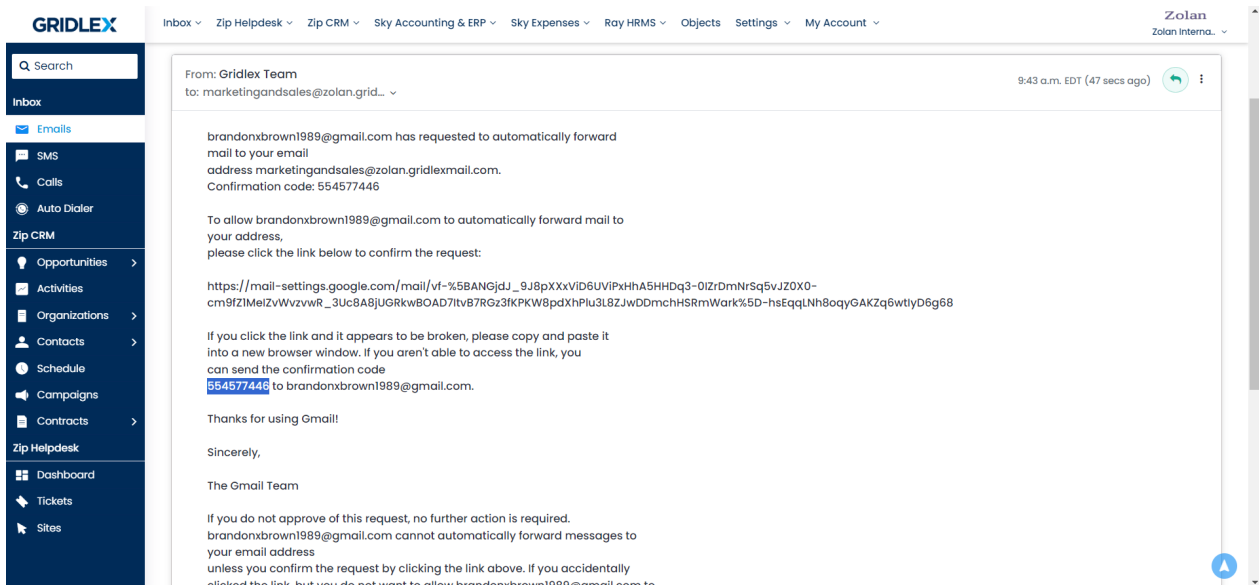
Step 20: A confirmation link will now be sent to your Gridlex Mail inbox.



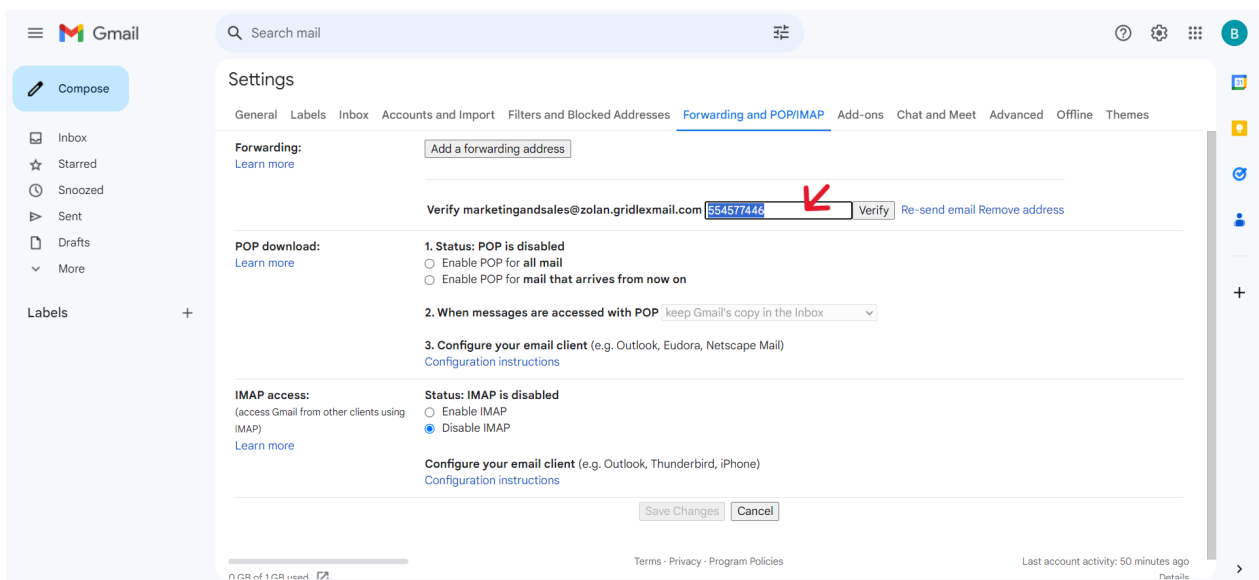
Step 21: Open the confirmation email sent to your Gridlex Mail inbox.



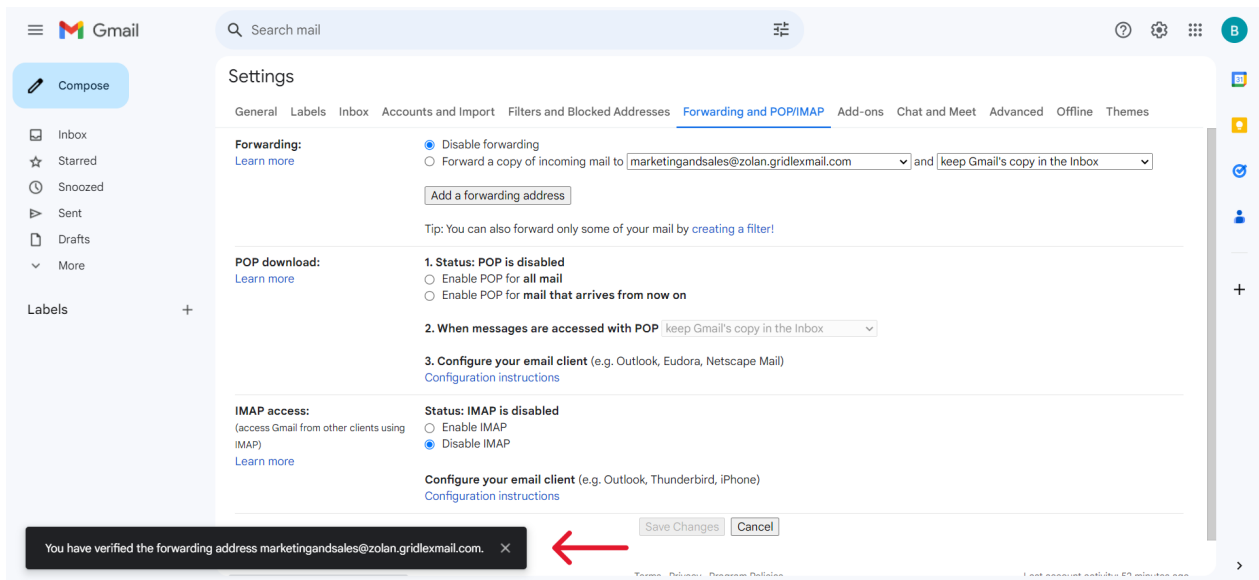
Step 22: Copy the confirmation code and return to your Gmail settings.



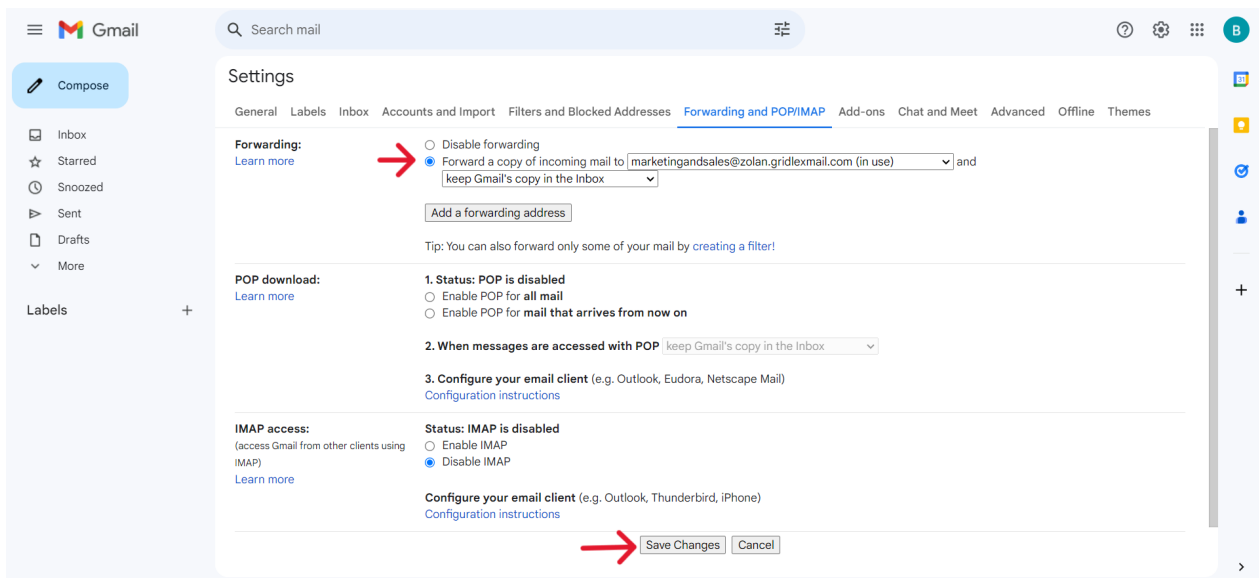
Step 23: Paste the confirmation code in the field as shown below, and click 'Verify'



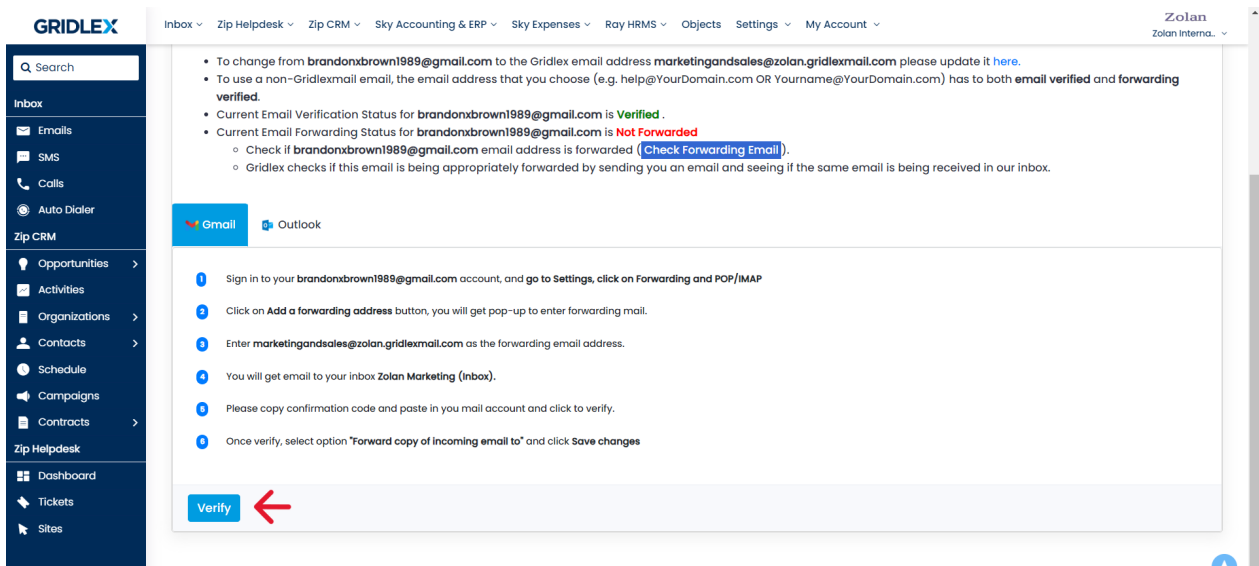
Step 24: You'll see the following message if the code you entered is valid.



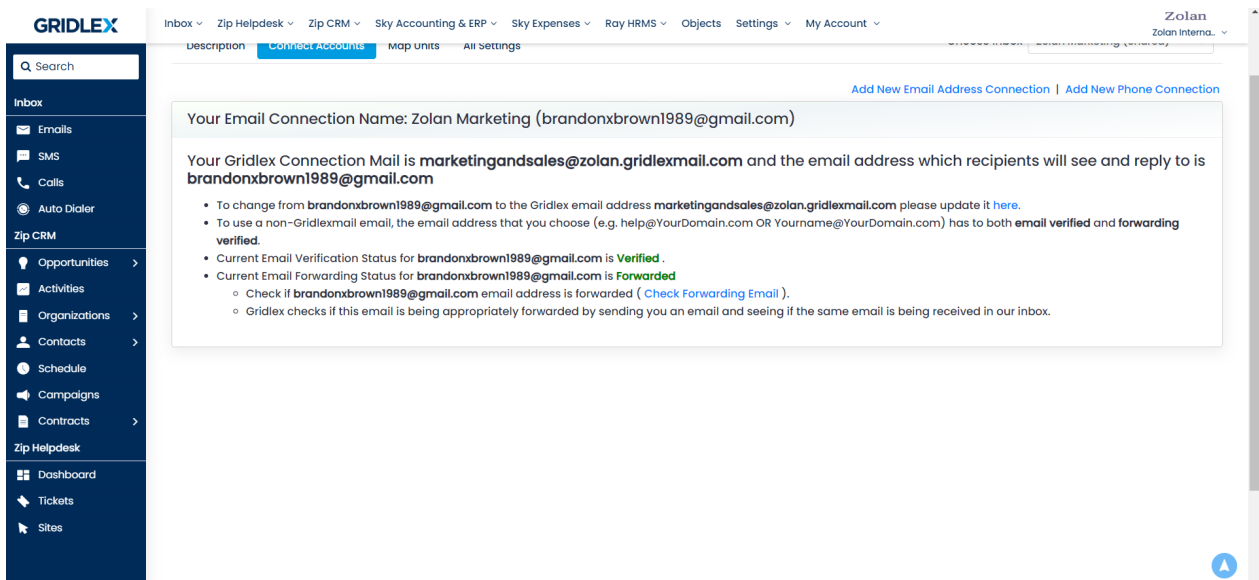
Step 25: Select the option as shown below and click ‘Save Changes.’



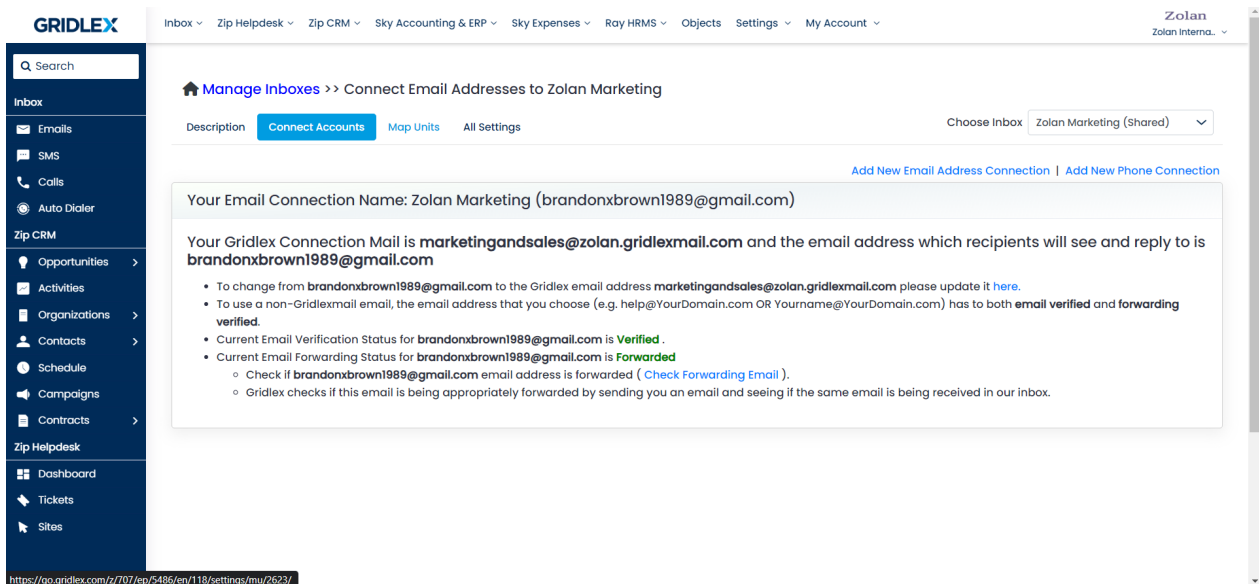
Step 26: Return to the verification page, click ‘Verify,’ and refresh the page.



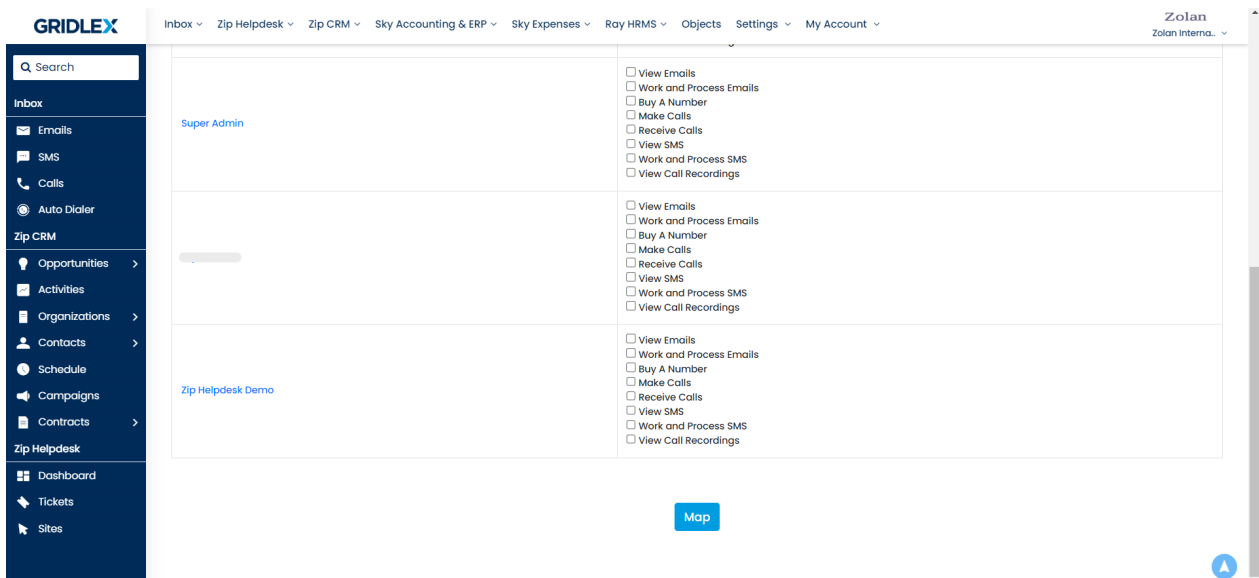
Step 27: You'll now see that your emails are forwarded. You can also view a copy of your emails in Gridlex Zip if verified.



Step 28: To manage inbox permissions, click on 'Map Units' from the top navigation bar.



Step 29: On this page, you can specify which units will have access to your inbox. Once you are done checking the desired settings, click 'Map.'



Congratulations! You have now learned how to create an inbox, manage email connections and inbox permissions.

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.