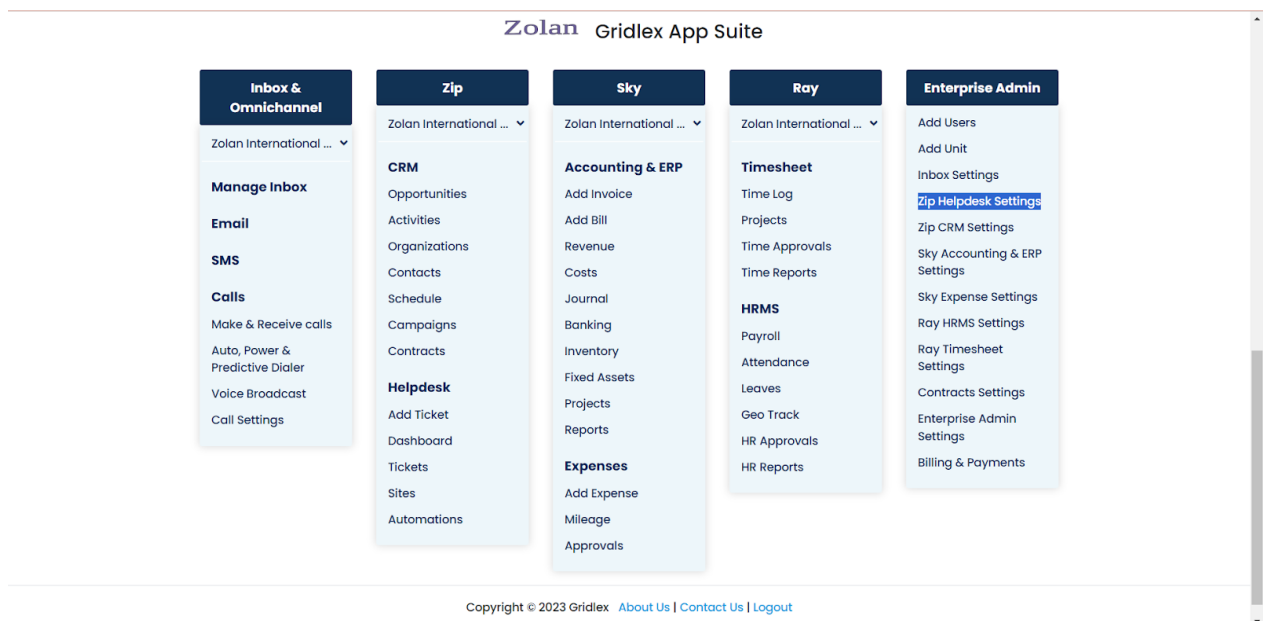
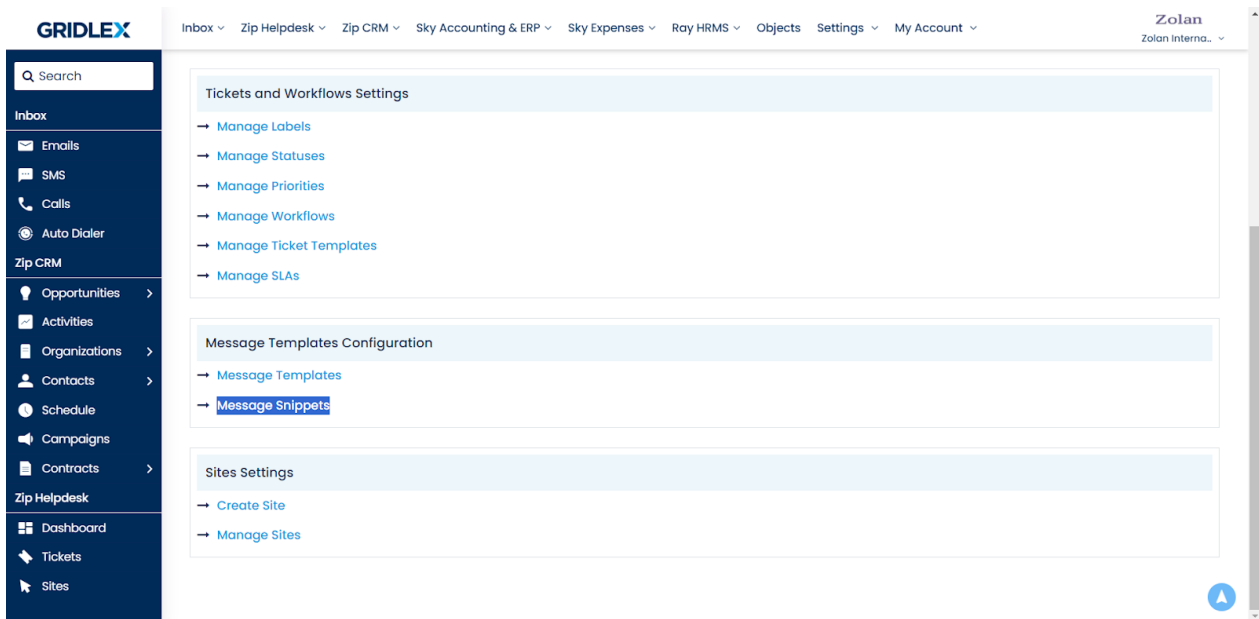


Frequently sending emails and SMS to customers and clients can become a time-consuming task, especially when you often send similar messages that contain repetitive text. So, how can you streamline this repetitive process? The Message Snippets feature in Gridlex Zip is designed for just that. This feature allows you to save frequently used texts and use them in email and SMS campaigns. Refer to this guide to learn how to create message snippets in Gridlex Zip and save valuable time in your communication processes.

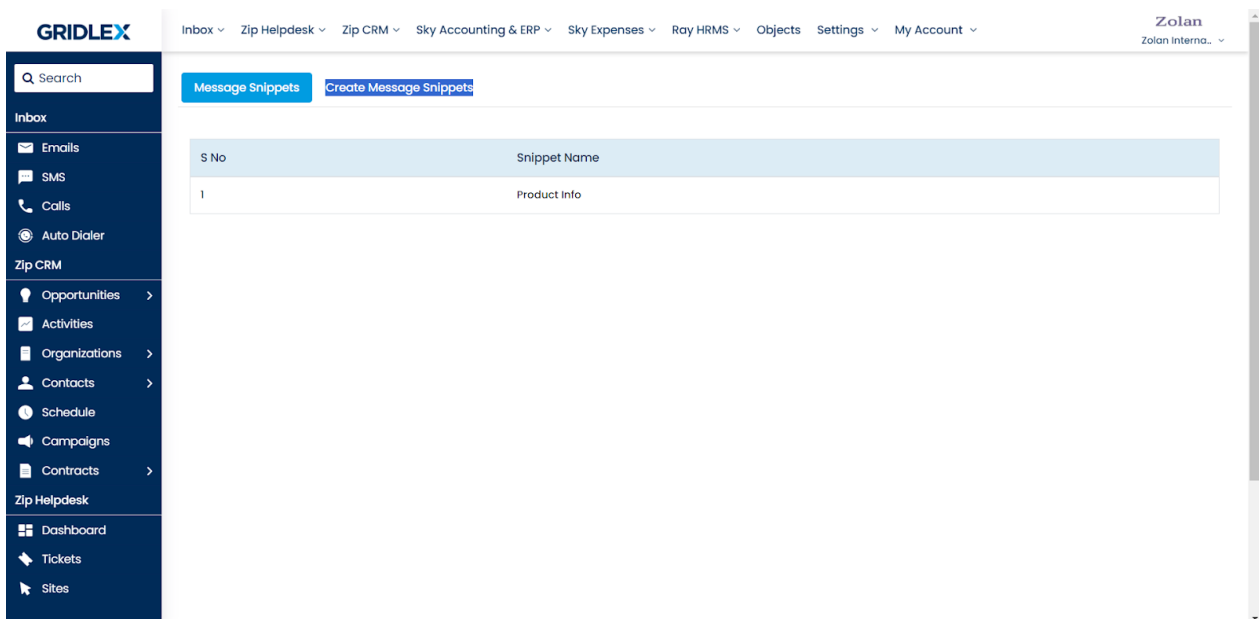
Step 1: Log in to your Gridlex App Suite account and click on the "Zip Helpdesk Settings" option under the Enterprise Admin tab.



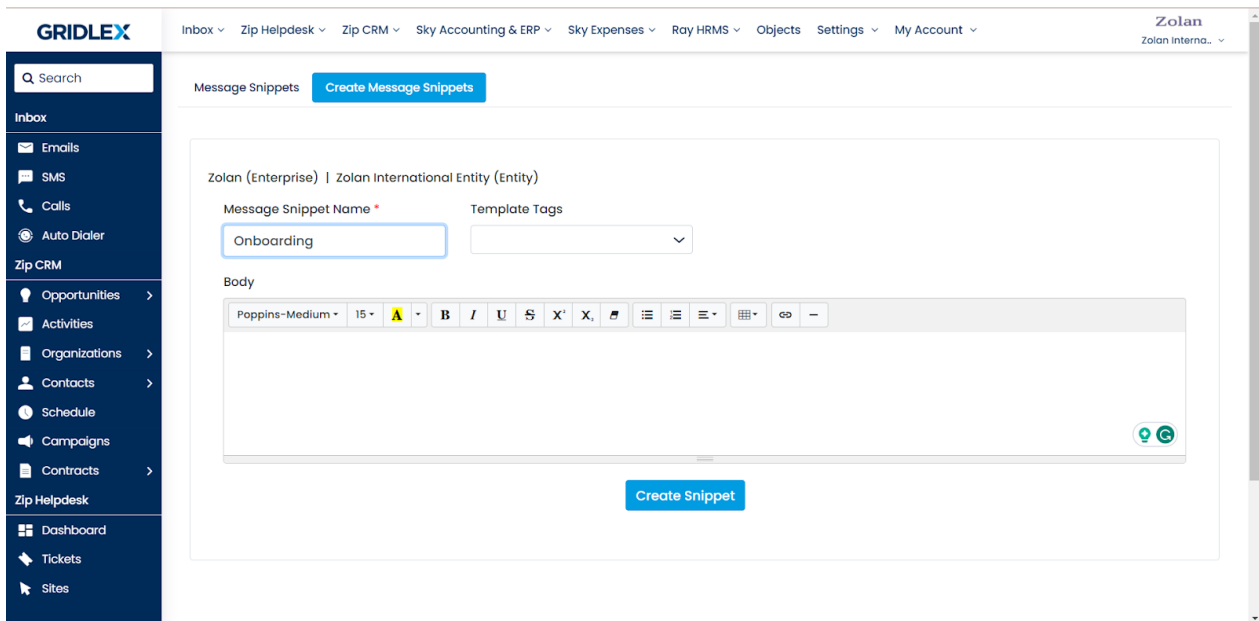
Step 2: Click on "Message Snippets" from the "Message Templates Configuration."



Step 3: Click on “Create Message Snippets.”

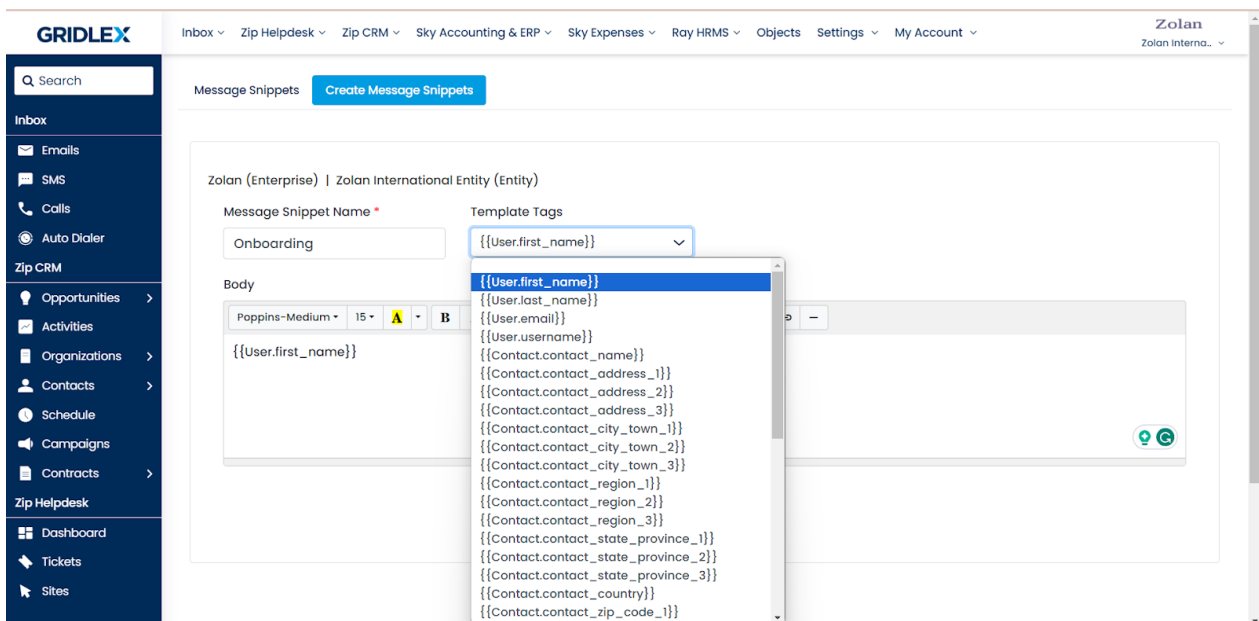


Step 4: Add the message snippet name.



Step 5: Next, add the template tags. By selecting a template tag, you can import contact details from the CRM.

For example, here we have selected `{{User.first_name}}`; this tag automatically inputs a contact's first name from the CRM, eliminating the need for manual entry each time. This feature is a great asset for sending bulk emails or running campaigns.



Step 6: Add the body of the message snippet. Once done, click “Create Snippet.”

The screenshot displays the Gridlex Zip CRM interface. On the left is a dark blue sidebar with a search bar and a menu containing 'Inbox', 'Emails', 'SMS', 'Calls', 'Auto Dialer', 'Zip CRM', 'Opportunities', 'Activities', 'Organizations', 'Contacts', 'Schedule', 'Campaigns', 'Contracts', 'Zip Helpdesk', 'Dashboard', 'Tickets', and 'Sites'. The main header area includes the Gridlex logo, navigation links (Inbox, Zip Helpdesk, Zip CRM, Sky Accounting & ERP, Sky Expenses, Ray HRMS, Objects, Settings, My Account), and the user profile 'Zolan Zolan interna..'. The central content area is titled 'Message Snippets' and features a 'Create Message Snippets' button. Below this, the form is for 'Zolan (Enterprise) | Zolan International Entity (Entity)'. It contains a 'Message Snippet Name' field with the value 'Onboarding', a 'Template Tags' dropdown showing '{{User.first_name}}', and a 'Body' text editor. The text editor has a rich text toolbar and contains the following text: 'Hi {{User.first_name}},', 'It's great to have you here, and thanks for choosing us.', and 'I've attached a PDF mapping out the steps of your onboarding resources that you might find helpful'. A 'Create Snippet' button is located at the bottom right of the form.

You’ve successfully created a snippet in Gridlex Zip. You can use the message snippet while sending emails and messages.

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.