The ability to send and receive emails in a helpdesk system is critical for effective customer support, allowing quick and convenient communication and improving response times and customer satisfaction.

## **Prerequisite:**

Firstly, you need to have your email account connected with Gridlex. If you haven't done so, please refer to our guide on - <u>How to Create an Inbox,</u> <u>Manage Email Connections, and Inbox Permissions in Gridlex Zip?</u>

Follow the instructions given below to learn how to send and receive emails in Gridlex Zip.

**Step 1:** Log in to the Gridlex App Suite and click on "Email" located under the Inbox and Omnichannel section.

Inbox &	Zip	Sky	Ray	Enterprise Admin
Omnichannel Zolan International Y Manage Inbox Email SMS Calls Make & Receive calls Auto, Power & Predictive Dialer Voice Broadcast Call Settings	Zolan International CRM Opportunities Activities Organizations Contacts Schedule Campaigns Contracts Helpdesk Add Ticket Dashboard Tickets Sites	Zolan International Y Accounting & ERP Add Invoice Add Bill Revenue Costs Journal Banking Inventory Fixed Assets Projects Reports Expenses Add Expense	Zolan International Timesheet Time Log Projects Time Approvals Time Reports HRMS Payroll Attendance Leaves Geo Track HR Approvals HR Reports	Add Users Add Unit Inbox Settings Zip Helpdesk Settings Zip CRM Settings Sky Accounting & ERP Settings Sky Expense Settings Ray HRMS Settings Ray Timesheet Settings Contracts Settings Enterprise Admin Settings Billing & Payments
	Automations	Mileage Approvals		

**Step 2:** This will lead you to your default inbox - "Zolan" for instance, where all incoming emails will be visible.

## Note: If you want to switch inboxes, simply click on "Choose Inbox" on the right. Then, select the desired inbox.

GRIDLEX	Inbox v Zip Helpdesk v Zip CRM v Sky Accounting & ERP v Sky Expenses v Ray HRMS v Objects Settings v My Account v Zok Zok	Zolan an Interna
Q Search	Inbox Sent Drafts Trash Spam Outgoing Scheduled Compose Choose Inbox Zolan (Shared)	~
Inbox	Search	
SMS	snowing i=/ of / M	tessages
Calls	morristowne - Re: ReSchedule Request - Anti-infective therapy sessions. Helio Harry Andrews, As per your request, we will reschedule the appointment to 10:00 a.m. on June 23, 2023. Have a pleasant day. On Tue, Jun 20, 2023 _	Jun 20
Zip CRM	help@zolan.g_ Hi Harry Andrews, It is Good to hear from you, regarding Anti-infection Therapy sessions with us. We are pleased to provide service for you at June 22n_	Jun 20
Activities	help@zolan.g_ Call & SMS Feature Hi, Thanks for reaching out. Yes, they are both up and running with full functionality. We'll give you a call to explain more On Wed, Jun 29, 2022 12:32 a. June 2010 State St	ın 29,2022
<pre>Organizations &gt;</pre>	Gabriel Feing_     Re: Meeting Tomorrow     Perfect, likewise On Tue, Jun 28, 2022 at 2:56 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi Gabriel, No worries, 10am works for us. I'll rese.     Jun 28, 2022 at 2:56 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi Gabriel, No worries, 10am works for us. I'll rese.     Jun 28, 2022 at 2:56 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi Gabriel, No worries, 10am works for us. I'll rese.     Jun 28, 2022 at 2:56 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi Gabriel, No worries, 10am works for us. I'll rese.     Jun 28, 2022 at 2:56 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi Gabriel, No worries, 10am works for us. I'll rese.     Jun 28, 2022 at 2:56 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi Gabriel, No worries, 10am works for us. I'll rese.     Jun 28, 2022 at 2:56 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi Gabriel, No worries, 10am works for us. I'll rese.     Jun 28, 2022 at 2:56 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi Gabriel, No worries, 10am works for us. I'll rese.     Jun 28, 2022 at 2:56 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi Gabriel, No worries, 10am works for us. I'll rese.     Jun 28, 2022 at 2:56 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi Gabriel, No worries, 10am works for us. I'll rese.     Jun 28, 2022 at 2:56 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi Gabriel, No worries, 10am works for us. I'll rese.     Jun 28, 2022 at 2:56 PM Zolan Helpdesk < help@zolan.gridlexmail.com > wrote: Hi Gabriel, No worries, 10am works for us. I'll rese.	ın 29,2022
<ul><li>Schedule</li><li>Campaigns</li></ul>	Gabriel Feing-     Pipeline Bug?       Hi Zolan team, Everything is good, I just wanted to let you know that when you click on the "Contracts" pipeline there is no follow up action in other wor.	ın 29,2022
Contracts >	Himanshu Jat Hi Zolan Team, I've been using the Helpdesk + CRM software for the past couple of days and I have great feedback for the product. Please keep up the _ Mc	ay 16,2022
<ul> <li>Dashboard</li> <li>Tickets</li> </ul>	Himanshu Jat Customer Inquiry Hi Zolan Team, I want to get in touch to get some information about your CRM software. Thanks, Himanshu Jat Gridlex, I Gridlex.com   himanshu@gridleM	ay 16,2022
Sites		

**Step 3:** In order to send emails, click the compose button on the top navigation. Choose the preferred inbox for sending.. Then fill in the recipient's email, subject, and body. Once ready, hit the "Send" button.

Note: Options are available to "Schedule Send" or "Save as Draft". To abandon your message, click "Discard".

GRIDLEX	Inbox 🗸 Zip Helpdesk 🗸 Zip CRM 🗸 Sky Accounting & ERP 🗸 Sky Expenses 🗸 Ray HRMS 🗸 Objects Settings 🗸 My Account 🤟	Zolan Zolan Interna ~
<b>Q</b> Search	Inbox Sent Drafts Trash Spam Outgoing Scheduled Compose Choose Inbox Zolan (Shared)	~
Inbox		
🞽 Emails	Zolan Helpdesk <help@zolan.gridlexmail.com></help@zolan.gridlexmail.com>	
SMS	Harry Andrews Cc Bcc +	
<ul> <li>Calls</li> <li>Auto Dialer</li> </ul>	Harry Andrews harryandrews0208@gmail.com	
Zip CRM	Re: Free Trial	
Opportunities >		
Z Activities		
Organizations >	We offer a 30-day free trial that you can take advantage of. We would love to schedule a demo at your convenience to showcase the system.	
Contacts >		
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	Send     Schedule Send     Save as Draft     Discard	

Following the steps above will ensure a smooth emailing experience within Gridlex Zip. If you have any questions or encounter any issues, please don't hesitate to reach out.

If you need any help with any feature, data migration of your old data, or anything at all, just email <u>apps@gridlex.com</u> 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.