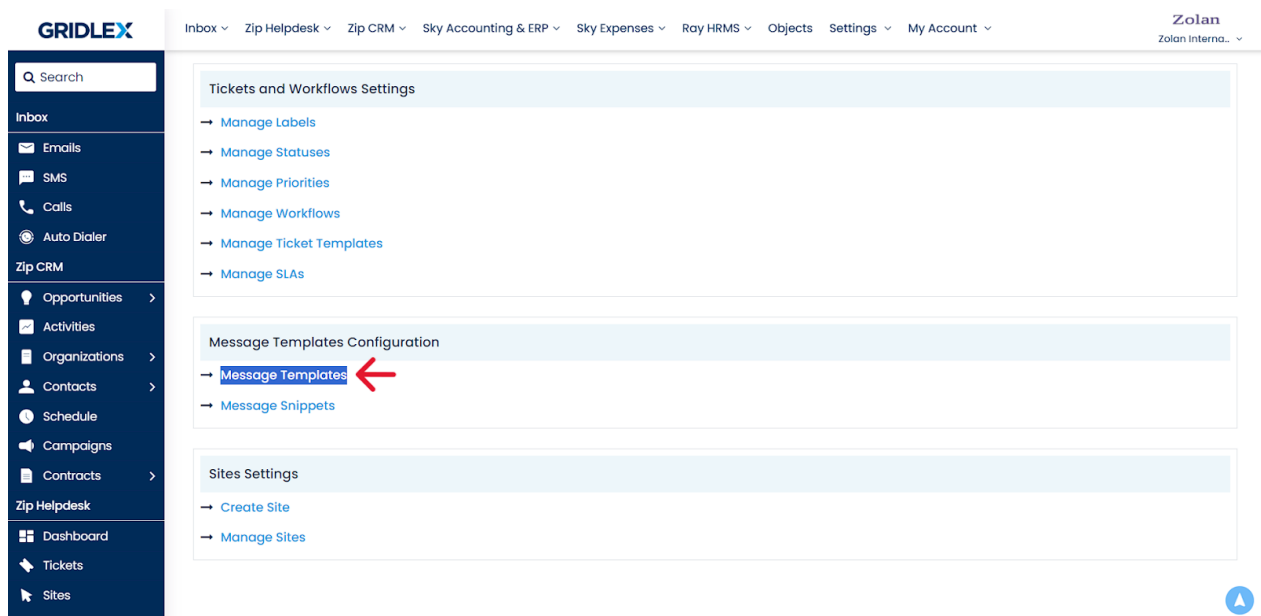


## How to Create and Map Message Templates in Gridlex Zip?

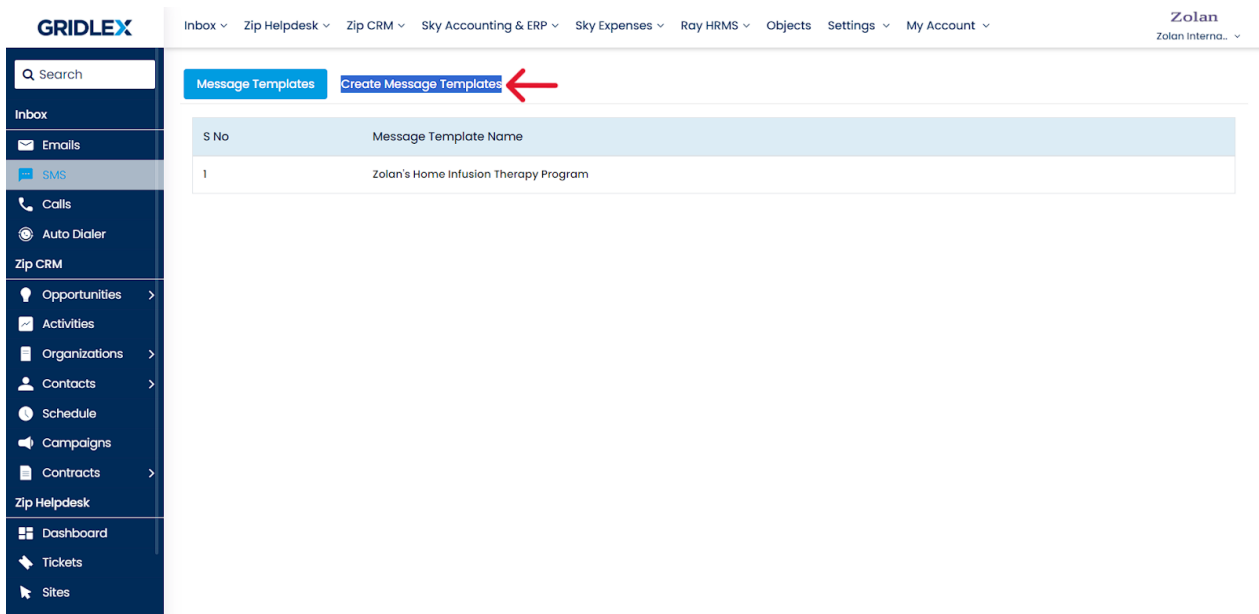
**Step 1:** Log in to the Gridlex App Suite and click 'Zip Helpdesk Settings' under the Enterprise Admin section.



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

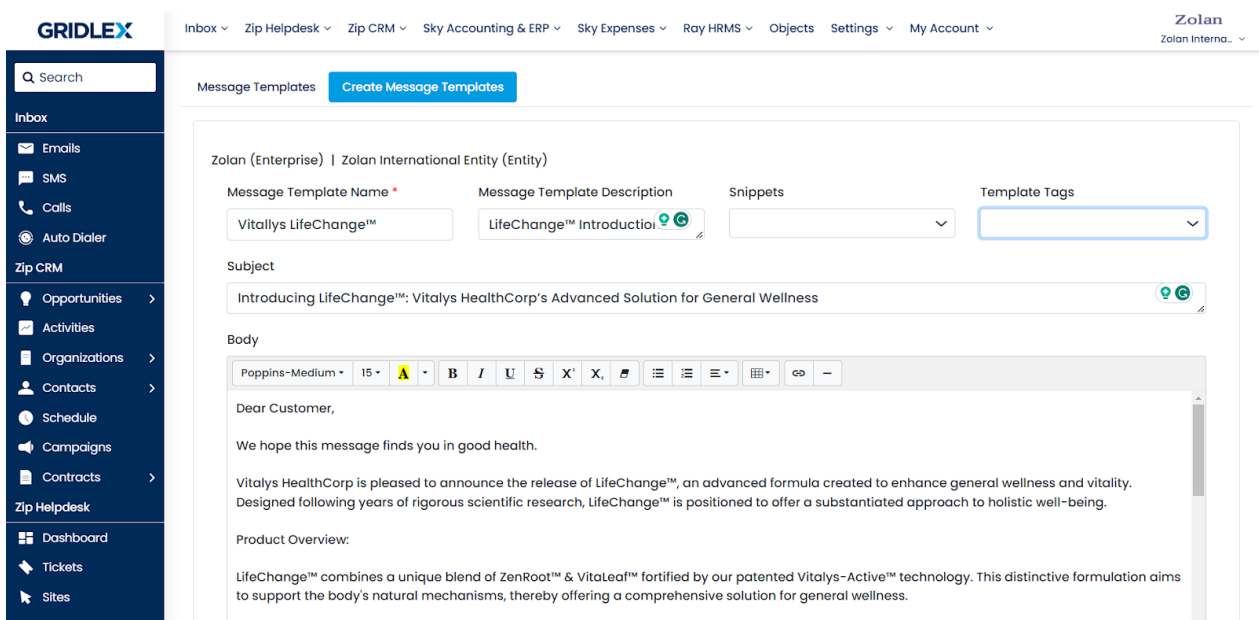


### Step 3: Click 'Create Message Template'



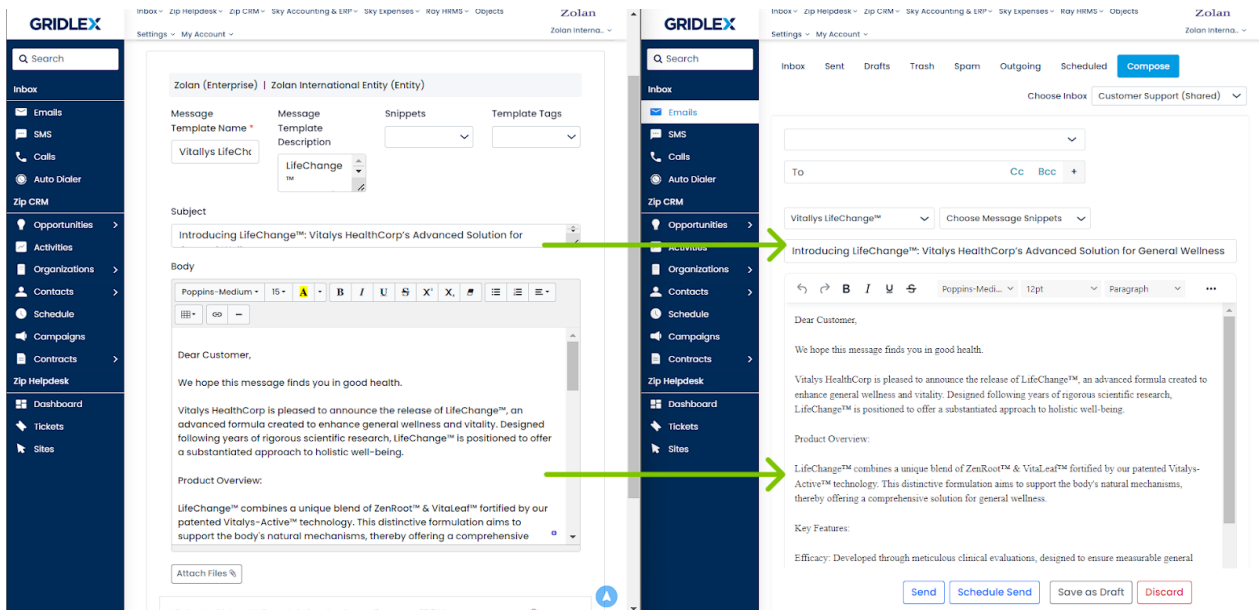
The screenshot shows the GRIDLEX dashboard. The top navigation bar includes links for Inbox, Zip Helpdesk, Zip CRM, Sky Accounting & ERP, Sky Expenses, Ray HRMS, Objects, Settings, and My Account. The left sidebar contains a search bar and a list of modules: Inbox, Emails, SMS, Calls, Auto Dialer, Zip CRM, Opportunities, Activities, Organizations, Contacts, Schedule, Campaigns, Contracts, Zip Helpdesk, Dashboard, Tickets, and Sites. The main content area has two tabs: 'Message Templates' and 'Create Message Templates', with the latter highlighted by a red arrow. Below the tabs is a table with two columns: 'S No' and 'Message Template Name'. The table contains one row with the value '1' in the 'S No' column and 'Zolan's Home Infusion Therapy Program' in the 'Message Template Name' column.

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

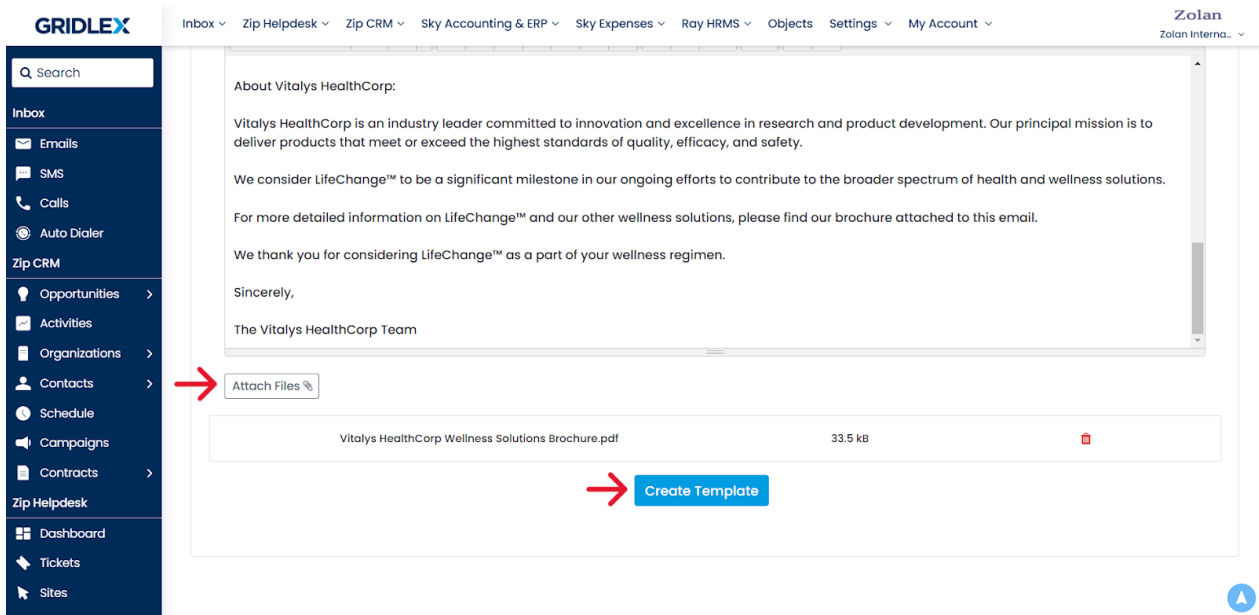


The screenshot shows the GRIDLEX dashboard with the 'Create Message Templates' form open. The form is titled 'Zolan (Enterprise) | Zolan International Entity (Entity)'. It has four main sections: 'Message Template Name', 'Message Template Description', 'Snippets', and 'Template Tags'. The 'Message Template Name' field contains 'Vitallys LifeChange™'. The 'Message Template Description' field contains 'LifeChange™ Introduction'. The 'Snippets' field is empty. The 'Template Tags' field is empty. Below these fields is the 'Subject' field, which contains 'Introducing LifeChange™: Vitalys HealthCorp's Advanced Solution for General Wellness'. Below the subject field is the 'Body' field, which 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)

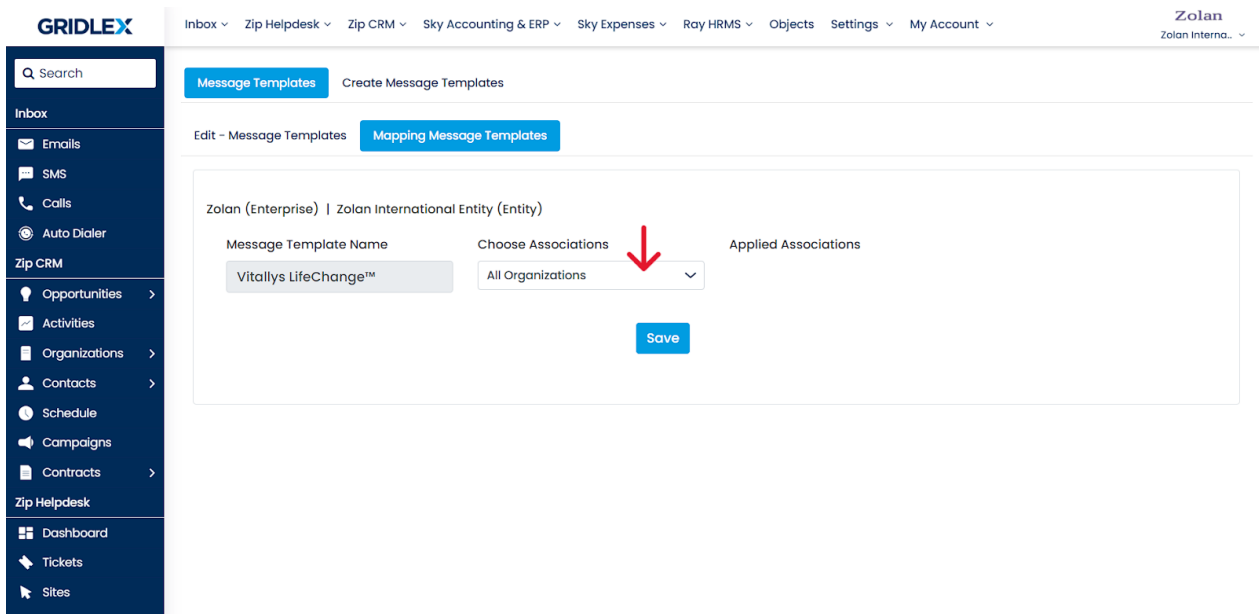


**Step 5:** Scroll down and click 'Attach Files' to add an attachment. Click 'Create Template.' You'll now be redirected to the message templates mapping page.



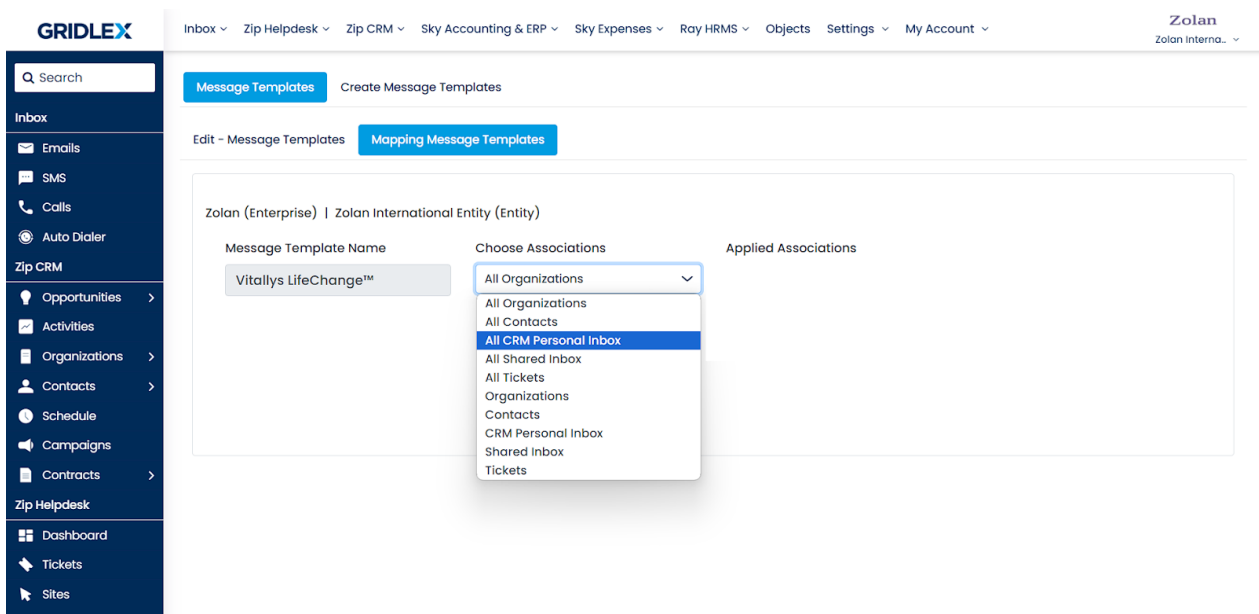
Mapping Message Templates:

**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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**Message Templates** Create Message Templates

Edit - Message Templates **Mapping Message Templates**

Zolan (Enterprise) | Zolan International Entity (Entity)

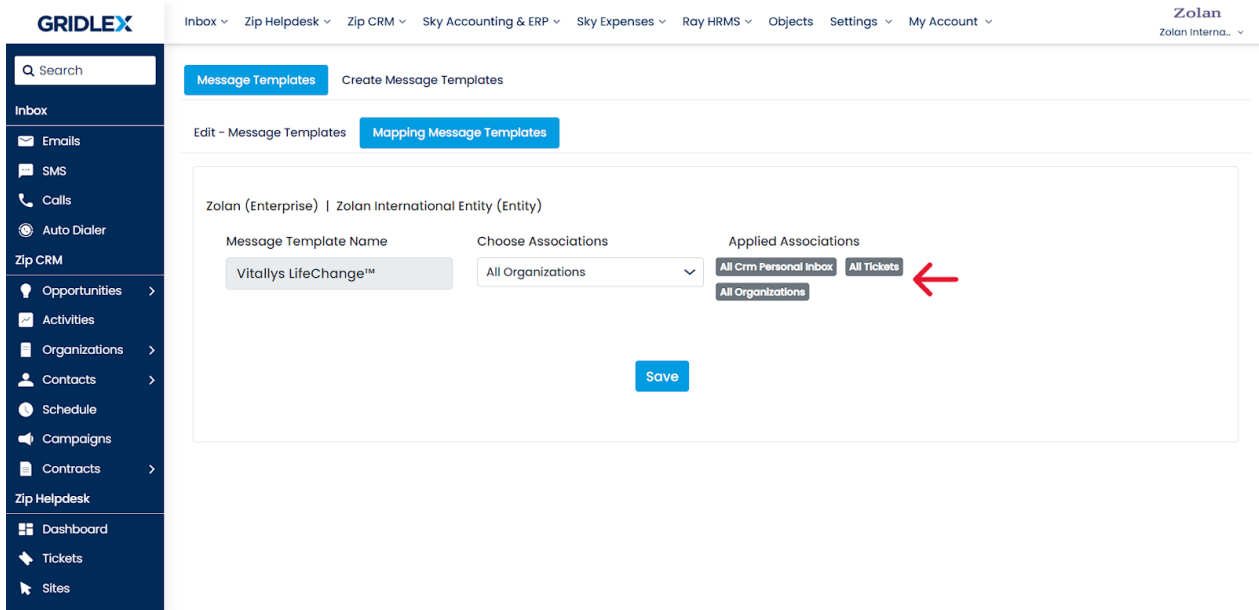
Message Template Name: Vitallys LifeChange™

Choose Associations: All CRM Personal Inbox ▾

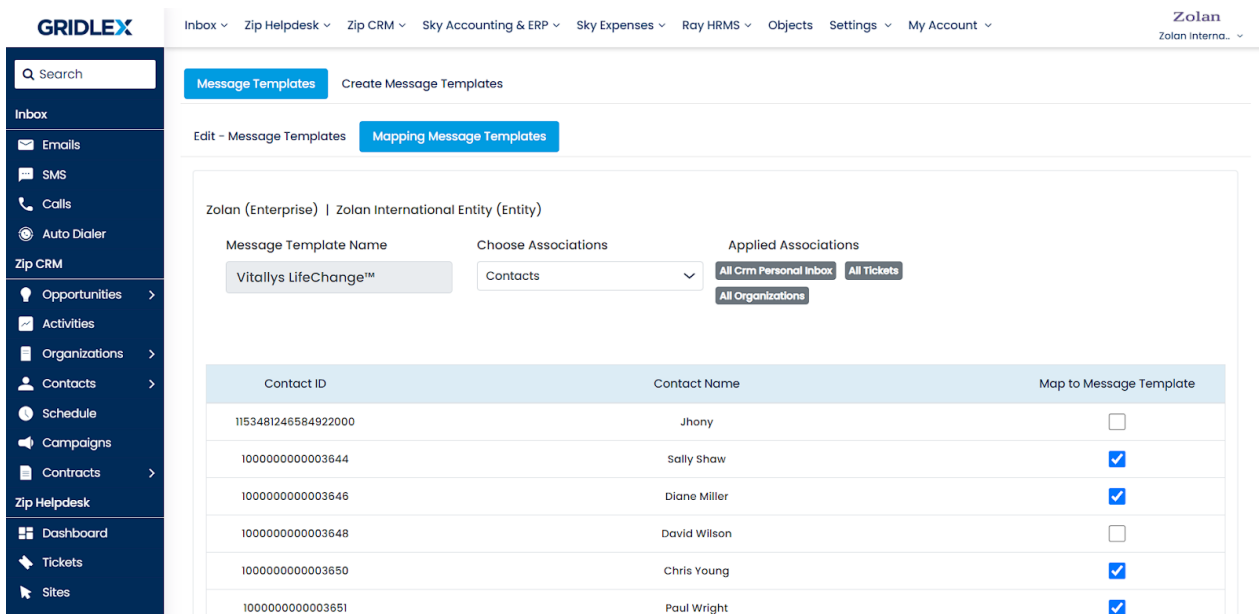
Applied Associations: All Crm Personal Inbox

**Save**

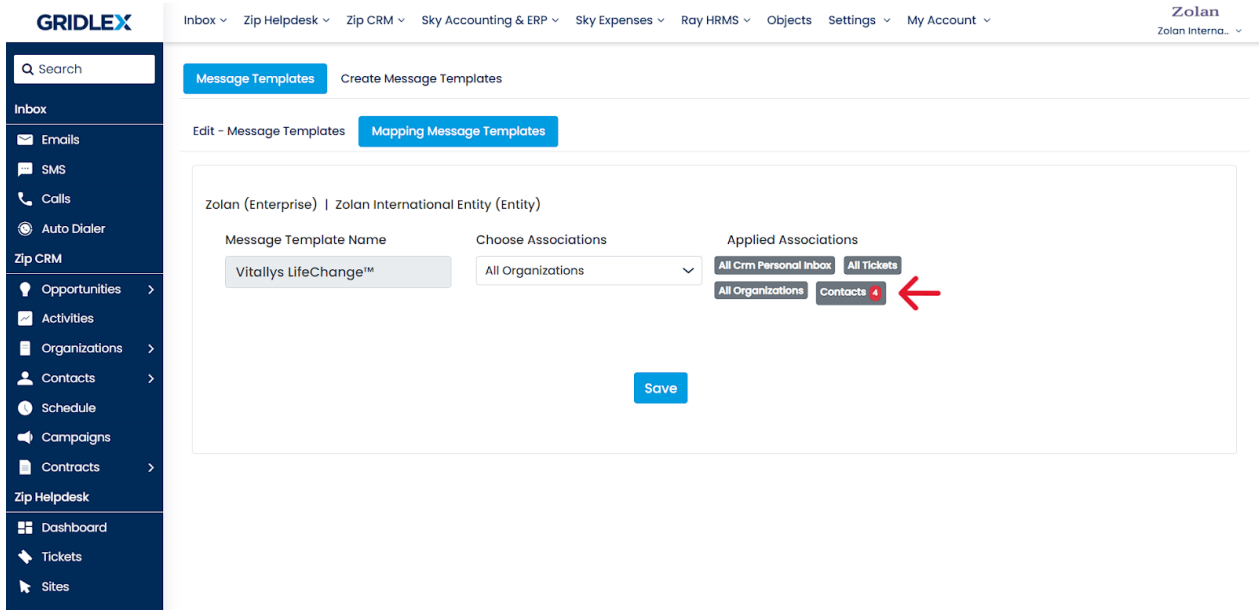
Repeat Step 7 and Step 8 to map more associations if you wish. (See below)



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](mailto: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.