

This video will show you how to create a new opportunity template and add opportunity to it in Gridlex Zip CRM. With Gridlex Zip CRM, you can easily create templates for different opportunities, allowing you to quickly and easily create, customize, and track opportunities. In this video we will walk you through the steps of creating a new opportunity template, adding an opportunity to it, and then tracking the progress of the opportunity. We will also demonstrate how to customize the opportunity template to better suit your needs.



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.