Customer management

Tutorial on Using the Customer List

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I. Feature Introduction

The customer list feature helps merchants efficiently manage private domain traffic and reduce operational management costs. Through the customer list, merchants can understand the relationship between customers and the enterprise, including the name, personal tags, enterprise tags, added employees, channel remarks, and addition time. Merchants can quickly locate users based on multi - dimensional filtering conditions and perform common operational operations (such as tagging) on users with different characteristics to facilitate subsequent refined operations.

II. Purpose of Use

Help merchants understand the basic information of customers and promptly adjust the operational strategies for different customers.

III. Usage Scenarios

Merchant A held a holiday marketing event last week and converted most customers into private domain traffic for management. After the event, the merchant wanted to mark the customers who added employees during the holiday marketing event. So, the merchant first filtered out these customers through the time - filtering condition and then uniformly tagged them with enterprise tags related to the event for identification and later follow - up.

IV. Operation Path

Desktop Management Console—SCRM—Customer Management—Customer List

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V. Usage Tutorial

(I) Customer Filtering

1. Supports custom filtering conditions to filter out the required customers and supports export.

2. Filtering conditions include: customer name (supports fuzzy search), added employees, follow - up status, personal tags, enterprise tags, channel remarks, addition time, and churn status.

(II) Introduction to the Customer List Page

1. The list displays all user information by default. The displayed fields are: customer name, remarks, gender, personal tags, enterprise tags, added employees, channel remarks, follow - up status, and addition time.

2. The synchronization methods for the customer list include automatic synchronization and manual synchronization. The system defaults to automatic synchronization.

3. View customer details: In the customer list, click on the customer's avatar/nickname to jump to the customer details page.

4. Remark name: The remark name marked by enterprise employees for customers on Enterprise WeChat.

5. Personal tags: Display personal tags on Enterprise WeChat and personal tags in the customer profile of the Enterprise WeChat Assistant.

6. Enterprise tags: Tags created by enterprise administrators in the Enterprise WeChat backend to provide employees with unified tags for convenient operation and facilitate enterprise management.

7. Added employees & time: The enterprise employees added by the customer and the addition time.

8. Channel remarks: The remark name of the channel live code when the customer adds an employee through the channel live code.

9. Follow - up status: Consistent with the status set by employees for customers in [Chat Sidebar - elink Profile - Follow - up Status]. **Including: new customers, initial communication, potential customers, paying customers, non - potential customers**.

10. If a customer adds multiple employees, a record will be displayed for each added employee. Therefore, in the upper - left corner of the customer list, we provide merchants with the total number of customers and the total number of unique customers.

(III) View Customer Details: Enter the customer list page, click on the customer's name, and enter the [Customer Details] page.

1. Since each user may add multiple employees, and each employee can modify the user's information in the customer profile on the chat sidebar, the customer details will be displayed separately for each employee on the customer details page of the management console.

2. Customer information mainly includes: customer name, remark name, gender, addition time, channel remarks, personal tags, and enterprise tags.

3. The details page of customer information also displays information about all group chats the customer has joined, including: group name (click to jump to the group details), group owner, number of group members, customer's joining time, and group chat creation time.

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(IV) Tagging: On the customer list page, click the [Tag] button.

Supports batch tagging operations.

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Tutorial on Using Customer Tags

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I. Feature Introduction

Customer tags help enterprises set up an enterprise tag system and synchronize data to the Enterprise WeChat backend. After enterprise administrators set up enterprise tags, employees can assign corresponding enterprise tags to users in the sidebar - User Profile when communicating with customers, greatly improving employee operational efficiency. Subsequently, enterprises can standardize the management of customer tags and implement refined management of users with different characteristics in actual operational scenarios.

II. Purpose of Use

Assist enterprises in setting up a customer enterprise tag system. Employees can assign corresponding enterprise tags based on user characteristics, facilitating refined user segmentation and operation.

III. Usage Scenarios

An enterprise sets up enterprise tags in different dimensions on the management console, such as activity level (highly active, less active, likely to churn), conversion intention (converted, no intention, to be followed up), and hobbies (pop music, classical music, ethnic music) based on user data and business strategies. When interacting with users, enterprise employees can assign corresponding tags according to the user's situation. For example, employees can assign the 'Hobby - Classical Music' tag to users interested in classical music.

Later, when the merchant holds an operation event related to classical music, they can filter customers based on tags, send group messages, and offer exclusive discounts to attract existing users to participate in the event, enabling targeted operations and increasing the repurchase rate.

IV. Operation Path

Desktop Management Console → SCRM → Customer Management → Customer Tags

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V. Usage Tutorial

(1) Synchronize Tags

By default, it is in real - time two - way synchronization with the enterprise tags in the Enterprise WeChat backend. Additionally, you can manually click the synchronization button to manually synchronize the enterprise tags from the Enterprise WeChat backend.

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(2) Create a New Tag Group

Merchantscan create tag groups according to different dimensions.Click [Add Tag Group], and fill in the tag group name and tag name.

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(3) Edit a Tag Group

Click the [Edit] button corresponding to the tag group. Administrators can modify the tag group name, modify/delete/add tags within the group. After confirming and saving, the data will be synchronized to the Enterprise WeChat backend.

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(4) Delete a Tag Group

Click the [Delete] button of the tag group to delete the corresponding tag group. After deletion, the relevant tag data in the customer information will also be deleted.
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(5) Tag Sorting

Merchants can drag and sort tag groups and tag items.

(Tag Group

Sorting)
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(Tag Item

Sorting)

Introduction to customer statistics details

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I. Indicator Definitions

1. Total number of customers: The total number of customers added by enterprise members within the visible range of this application.

2. Number of newly added customers: The number of new customers added by enterprise members within the visible range of this application.

3. Number of lost customers: The number of customers deleted or added to the blacklist by enterprise members within the visible range of this application.

II. Frequently Asked Questions

1. Data update timing and cross - day calculation

(1) How often is the data updated?

The data is updated at 12:00 every night, and the data for each natural day will not change after the update.

[Example] Zhang San added 3 customers on the first day but deleted these 3 customers the next day. The 'Number of newly added customers' on the first day is still '3'.

Zhang San added 3 customers on the first day but immediately deleted them. The 'Number of newly added customers' on the first day is '0' because the statistics are made at 12:00 that night.

(2) How to calculate multi - day data?

The multi - day data of 'Number of newly added customers' and 'Number of lost customers' is the sum of the daily data.

2. Data coverage and statistical methods

(1) Is the statistics based on the relationship chain or customers?

The statistics are calculated based on the relationship chain between members and customers.

[Example] If 3 service staff add the same customer, the 'Number of newly added customers' is '3'.

(2) How to calculate the data after a member leaves the company or is transferred?

● After a member is transferred, the historical data generated before the transfer will follow the member.

[Example] If Zhang San is transferred from the sales department to the marketing department, Zhang San's historical and new data will be included in the marketing department.

● After a member leaves the company, the historical data generated before leaving will not be cleared.

[Example] If Zhang San in the marketing department leaves the company, the historical data of the marketing department will not decrease.