Tutorial on Using the Customer List

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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