

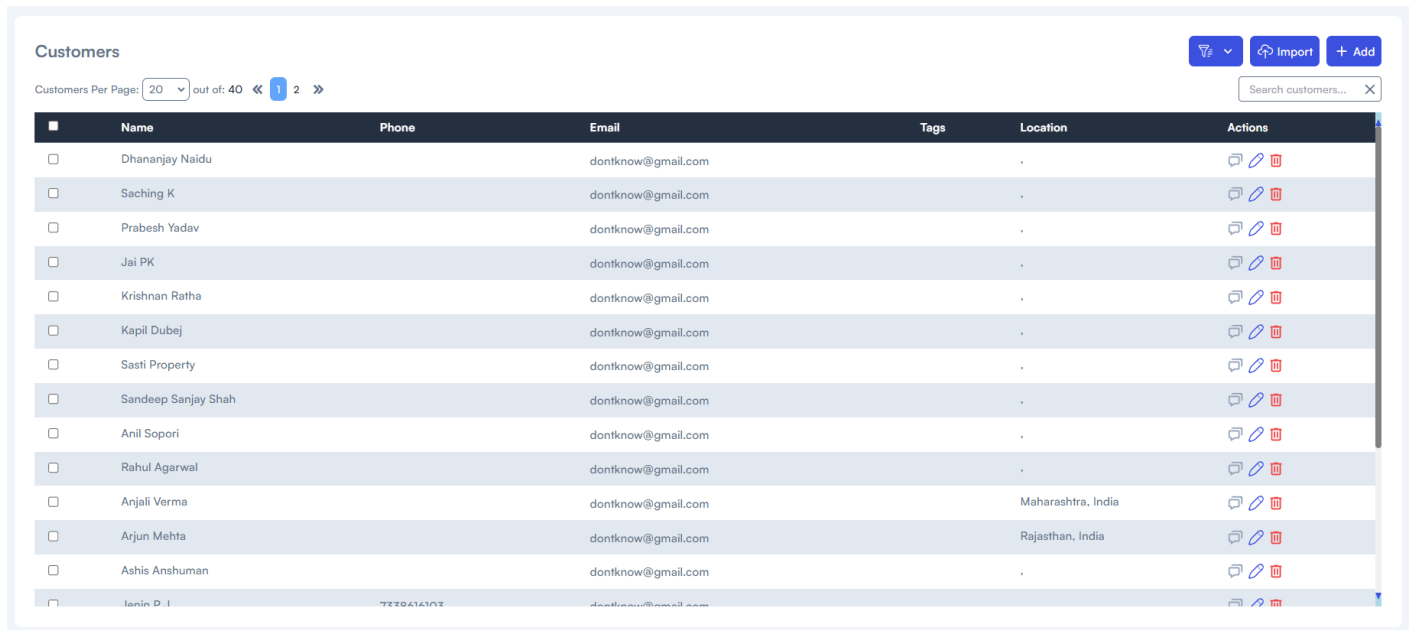
# Contact Management

The **Contacts Module** in vCX – The Social CRM is designed to help businesses effectively **organize, manage, and leverage their customer base** for better communication and engagement.











































- Contacts
- Groups aka Segments

# Contacts

The **Contacts Module** in vCX – The Social CRM is designed to help businesses effectively **organize, manage, and leverage their customer base** for better communication and engagement.



The screenshot displays the 'Customers' module interface. At the top, there are buttons for 'Import' and '+ Add'. Below these, a search bar is labeled 'Search customers...'. The main area is a table with columns: Name, Phone, Email, Tags, Location, and Actions. The table lists 15 customers, all with the email 'dontknow@gmail.com'. The first 12 customers have a location of '.'. The 13th customer, Anjali Verma, is located in 'Maharashtra, India'. The 14th customer, Arjun Mehta, is located in 'Rajasthan, India'. The 15th customer, Ashis Anshuman, has a location of '.'. The table also shows pagination: 'Customers Per Page: 20 out of 40' and page numbers '1' and '2'.

| Name                | Phone      | Email              | Tags | Location           | Actions   |
|---------------------|------------|--------------------|------|--------------------|---|
| Dhananjay Naidu     |            | dontknow@gmail.com |      | .                  |          |
| Sachin K            |            | dontknow@gmail.com |      | .                  |          |
| Prabesh Yadav       |            | dontknow@gmail.com |      | .                  |          |
| Jai PK              |            | dontknow@gmail.com |      | .                  |          |
| Krishnan Ratha      |            | dontknow@gmail.com |      | .                  |          |
| Kapil Dubej         |            | dontknow@gmail.com |      | .                  |          |
| Sasti Property      |            | dontknow@gmail.com |      | .                  |          |
| Sandeep Sanjay Shah |            | dontknow@gmail.com |      | .                  |          |
| Anil Sopori         |            | dontknow@gmail.com |      | .                  |          |
| Rahul Agarwal       |            | dontknow@gmail.com |      | .                  |          |
| Anjali Verma        |            | dontknow@gmail.com |      | Maharashtra, India |          |
| Arjun Mehta         |            | dontknow@gmail.com |      | Rajasthan, India   |    |
| Ashis Anshuman      |            | dontknow@gmail.com |      | .                  |    |
| Jatin D.L           | 7779474107 | dontknow@gmail.com |      | .                  |    |

## What is the Contacts Module?

The Contacts Module serves as the central hub for all your customer information, enabling businesses to:

- **Search and Find Contacts:** Quickly locate any contact using powerful search filters.
- **Send Messages:** Initiate one-on-one conversations directly from the contact list.
- **Broadcast Campaigns:** Use contact groups to send mass messages and announcements.
- **Track Activities:** Know who has placed an order, booked a service, or scheduled an appointment.

## Key Features

### 1. Contact Organization

- Import or add contacts manually.

- Tag and categorize contacts for easy filtering.
  - View detailed profiles, including past interactions, orders, or appointments.
- 

# Why Use the Contacts Module?

The Contacts Module empowers businesses to:

- **Streamline Communication:** Easily manage customer interactions and ensure faster response times.
- **Enhance Personalization:** Use detailed contact data to craft targeted and relevant messages.
- **Improve Customer Insights:** Understand customer preferences, orders, and engagement history at a glance.
- **Boost Campaign Effectiveness:** Dynamic groups make it easy to target the right audience with minimal effort.

# Groups aka Segments

## Groups and Customer Segmentation

The Contacts Module in vCX takes customer segmentation to the next level with **dynamic groups**, enabling businesses to categorize and target their customers more effectively.

Groups

Search group...

Create Group

|   | Name                                   | Created At | Actions |
|---|--|------------|---------|
| 1 | <a href="#">Team</a>                   | 9/23/2024  |         |
| 2 | <a href="#">Noida Client</a>           | 10/26/2024 |         |
| 3 | <a href="#">Gorakhpur Clients</a>      | 10/27/2024 |         |
| 4 | <a href="#">South Delhi Clients</a>    | 10/27/2024 |         |
| 5 | <a href="#">Divya</a>                  | 11/3/2024  |         |
| 6 | <a href="#">Noida - Ph 98</a>          | 11/16/2024 |         |
| 7 | <a href="#">Default(All Customers)</a> | 11/19/2024 |         |

## What are Groups?

Groups allow you to **segment customers** based on multiple parameters, ensuring you always reach the right audience. These groups are **dynamic**, meaning they automatically update when customer information changes, ensuring your segmentation remains accurate and up-to-date.

Create Group

×

Group Name \*

NewCustomers

Filter

In this view, show records

Where

OrderDate

After

09/01/2024

Combine with: AND

+ Add filter

Search

Clear all filters

Customers Per Page: 20 out of 1441

1

2

| Name               | Phone      | Email                    | Tags         | Location           |
|--------------------|------------|--------------------------|--------------|--------------------|
| Anita Singh Desai  | 9812345678 | anita.desai@example.com  | Noida Client | Delhi, India       |
| Rajesh Kumar Mehta | 9876543210 | rajesh.mehta@example.com |              | Maharashtra, India |
| Anjali Devi Verma  | 9123456789 | anjali.verma@example.com |              | Maharashtra, India |

# Segmentation Parameters

## 1. Contact Attributes:

- Name, email, phone number
- Location (city, region, or country)
- Tags for specific categories (e.g., VIP, leads, loyal customers)

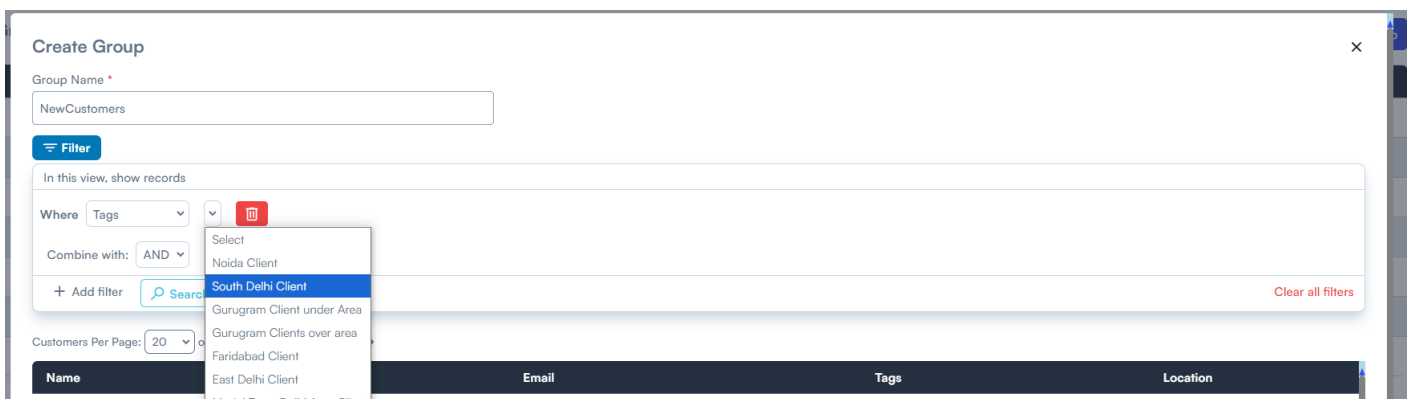
## 2. Order-Based Parameters:

- Purchase history (frequency, last purchase date, or total spend)
- Order type (products, services, or appointments)
- Order status (completed, pending, or canceled)

## 3. Engagement Metrics:

- Interaction frequency (number of messages or responses)
- Last communication date
- Participation in previous campaigns

By combining these parameters, you can create highly targeted customer segments tailored to your business needs.



# Why Dynamic Groups Matter

- **Always Up-to-Date:** Dynamic groups automatically include or remove customers based on real-time data, so your campaigns always target the right audience.
- **Improved Targeting:** Leverage granular segmentation to craft highly relevant messages, offers, or campaigns.
- **Enhanced Automation:** Use groups to power broadcast campaigns, workflows, or reminders without manual updates.
- **Personalized Engagement:** Reach customers with content that aligns with their behavior, preferences, and history.

# Examples of Dynamic Groups

1. **New Customers:**

Segment customers who placed their first order within the last 30 days.

2. **High-Value Customers:**

Target customers with total purchases exceeding a specific value.

3. **Appointment-Based Segments:**

Group customers who have scheduled appointments in the upcoming week.

4. **Inactive Customers:**

Create a segment for customers who haven't interacted in the last 60 days to re-engage them with campaigns.

5. **Tag-Based Segments:**

Use tags like "VIP," "Returning," or "Prospect" to segment contacts for personalized follow-ups.

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## How to Use Groups

1. Define segmentation parameters based on customer behavior, tags, or orders.
  2. Use groups to:
    - Send **targeted broadcast campaigns**.
    - Automate follow-ups and reminders.
    - Analyze customer segments to refine strategies.
  3. Monitor group performance and tweak parameters to align with business goals.
- 

## The Power of Segmentation

With vCX's dynamic and intelligent grouping, you can **unlock the full potential of customer data** to drive personalized engagement, improve campaign performance, and boost overall customer satisfaction.