

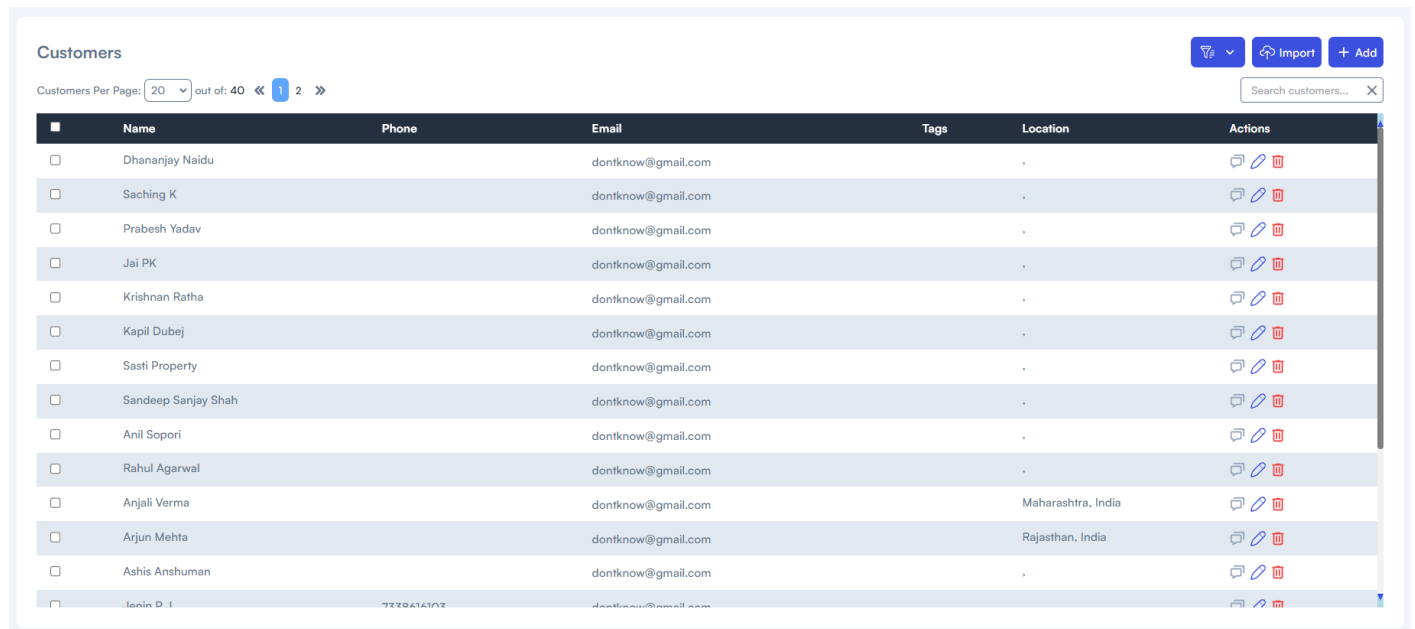
# Contact Management

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's a header with 'Customers' and a search bar. Below the header, a table lists customer records. The table has columns for Name, Phone, Email, Tags, Location, and Actions. The 'Actions' column contains icons for messaging, editing, and deleting each contact. The interface also includes pagination controls showing '20 out of 40' records and buttons for 'Import' and 'Add'.

	Name	Phone	Email	Tags	Location	Actions
<input type="checkbox"/>	Dhananjay Naidu		dontknow@gmail.com		.	
<input type="checkbox"/>	Saching K		dontknow@gmail.com		.	
<input type="checkbox"/>	Prabesh Yadav		dontknow@gmail.com		.	
<input type="checkbox"/>	Jai PK		dontknow@gmail.com		.	
<input type="checkbox"/>	Krishnan Ratha		dontknow@gmail.com		.	
<input type="checkbox"/>	Kapil Dubej		dontknow@gmail.com		.	
<input type="checkbox"/>	Sasti Property		dontknow@gmail.com		.	
<input type="checkbox"/>	Sandeep Sanjay Shah		dontknow@gmail.com		.	
<input type="checkbox"/>	Anil Sopori		dontknow@gmail.com		.	
<input type="checkbox"/>	Rahul Agarwal		dontknow@gmail.com		.	
<input type="checkbox"/>	Anjali Verma		dontknow@gmail.com		Maharashtra, India	
<input type="checkbox"/>	Arjun Mehta		dontknow@gmail.com		Rajasthan, India	
<input type="checkbox"/>	Ashis Anshuman		dontknow@gmail.com		.	
<input type="checkbox"/>	Jatin D. I	7789414103	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.

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# 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

Customers Per Page: 20 out of 1441

1

2

...

Clear all filters

September 2024

Su

Mo

Tu

We

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30

1

2

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11

12

Clear

Today

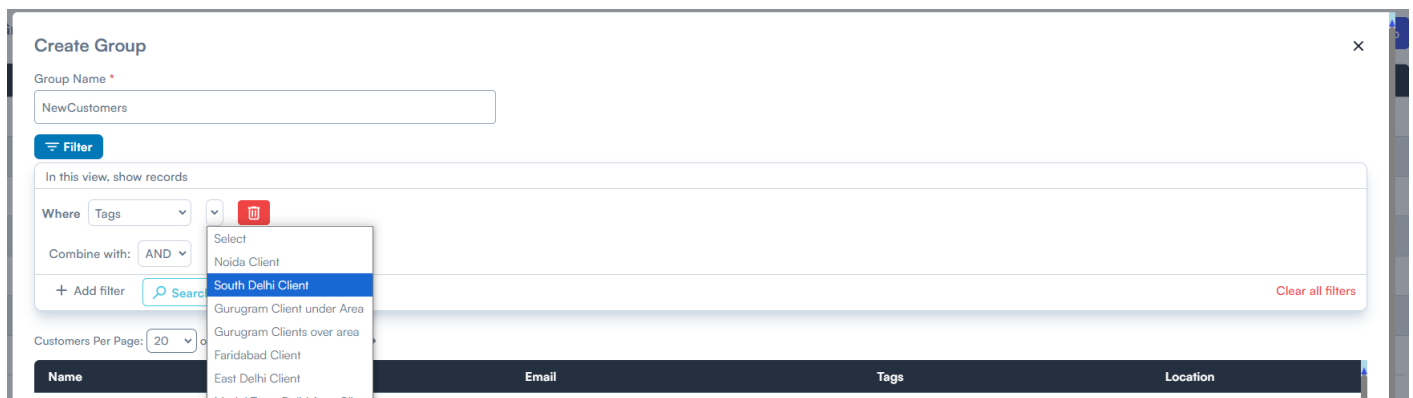
Name	Phone	Email	Tags	Location
Anita Singh Desai	9812345678	anita.desai@example.com	Noida Client	Delhi, India
Rajesh Kumar Mehta	9876543210	rajesh.mehta@example.com		Maharashtra, India
Anjali Devi Verma	9123456789	anjali.verma@example.com		Maharashtra, India

## 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.
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## 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.