

Moffice CRM Customer Groups

Introduction

Just as Customer Ratings are essential in evaluating Customer importance and priority, Customer Groups are pivotal in segmenting Customer types. There is no right answer on the exact groups to make, because it depends heavily on your business' unique model, product/service, and surrounding market. If your company already segments customers, use those segments as Customer groups. For businesses new to segmenting, below is a table of different ways to segment customers, depending on if you sell to the wider public (B2C) or to other businesses (B2B).

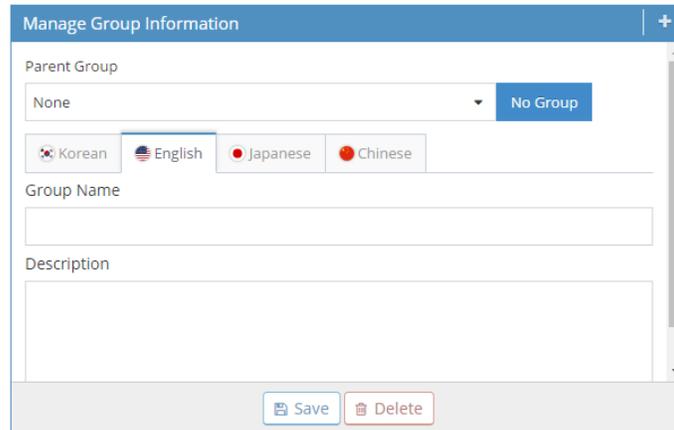
Different Ways to Segment Customers

B2B Companies (Business-to-Business)		B2C Companies (Business-to-Consumers)	
Industry	Size of Company	Location	Life Stage
Buying Patterns	Operations	Gender	Product Usage
Behavior	Relationship	Social Class	Brand Loyalty
Decision Criteria	Lifetime Value	Attitude	Occupation / Income
Geographic Clusters	Business Value	Lifestyle	Education

How to: Set up Customer Groups

After logging into MofficeSuite, head to the CRM > Customization > Customer Groups sub-menu. Herein, there will be two columns: the left column is the Group List where you can view your current Customer Group tree and the right column lets you create or edit Customer Groups.

To add a new Group, click on the plus (+) button on the upper right corner of the Manage Group Information column and make sure the Parent Group is “None” to make it a main Group category. Give the group a name (required!) and description and click “Save” when finished. You should be able to see your new group right away in the Group List column to your left.



After creating groups, you can view the Customer Group tree in the Group List column. In the example below, we have a variety of groups. To make a sub-group like the groups under “Special Requirements”, simply set “Special Requirements” as the Parent Group when creating the new sub-group under it.



After setting up Customer groups, you'll be able to utilize them in a variety of menus and methods of organization.

All Customers ▾

Type	Group	Name	Rep	Conversion Date
<input type="checkbox"/>	Price-Conscious	Allis Little	Giovanni Alighieri	2016/02/22 13:57
<input type="checkbox"/>	Blemish Focused	Potato Guys	Jamie Bronte and 1 ...	2015/11/24 11:23
<input type="checkbox"/>	Industry Expert	Concone	Jamie Bronte	2015/11/24 10:54
<input type="checkbox"/>	Infrequent Shopper	Srya Atark	Jamie Bronte	2015/09/18 09:01