



VITAL CRM

Tags

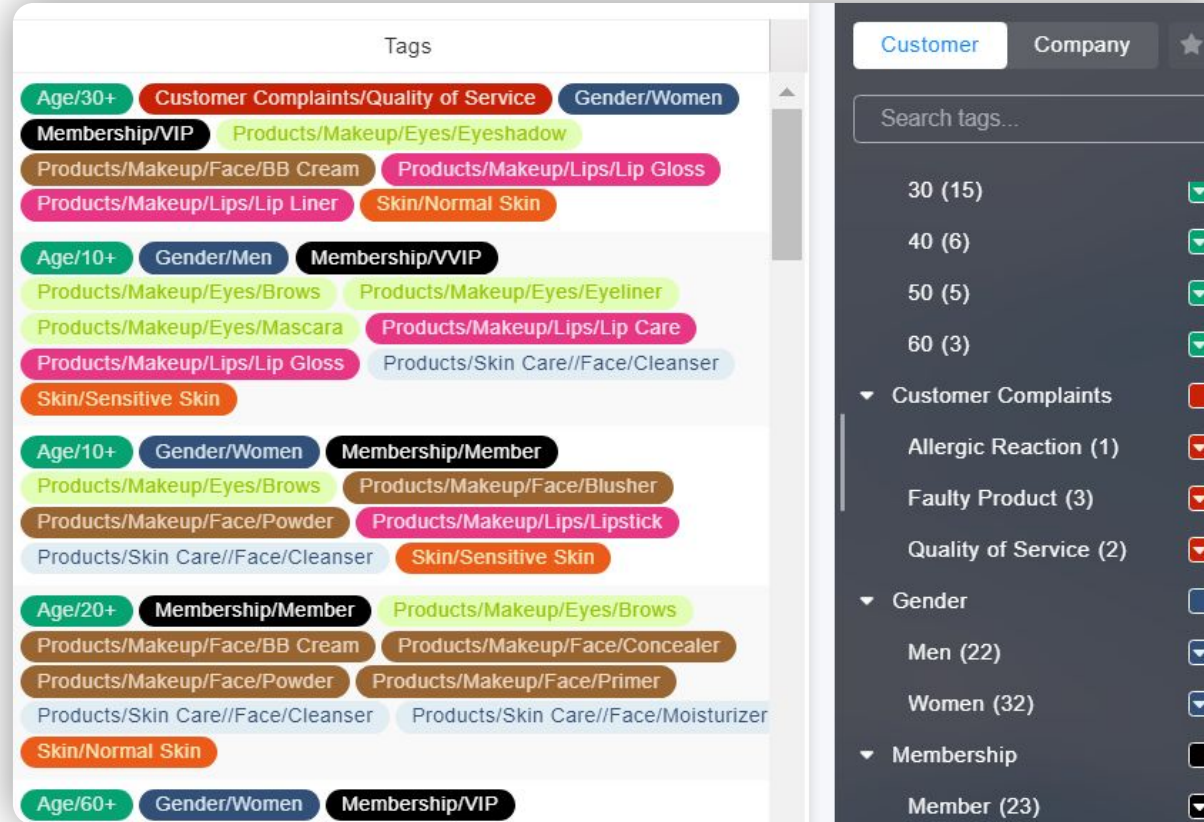
- **The 80/20 Rule**

80% of a company's annual revenue comes from 20% of its customers.

Who are your key customers?



# Tags-Focus Marketing



- Apply various characteristic tags to customers without the need to type keywords to search for customers. Utilize tag groups to easily achieve precision marketing.



Tagging Delete Merge Search by First Alphabet Display Fields

	Name	Social ...	Company	Mobile Phone	Landline Nu...	Tags
<input type="checkbox"/>	<input type="checkbox"/> AQQ			0930*****		<div>Age/30+ Customer Complaints/Quality of Service Gender/Women</div> <div>Membership/VIP Products/Makeup/Eyes/Eyeshadow</div> <div>Products/Makeup/Face/BB Cream Products/Makeup/Lips/Lip Gloss</div> <div>Products/Makeup/Lips/Lip Liner Skin/Normal Skin</div>
<input type="checkbox"/>	<input type="checkbox"/> AQQ			0937*****		<div>Age/10+ Gender/Men Membership/VVIP</div> <div>Products/Makeup/Eyes/Brows Products/Makeup/Eyes/Eyeliner</div> <div>Products/Makeup/Eyes/Mascara Products/Makeup/Lips/Lip Care</div> <div>Products/Makeup/Lips/Lip Gloss Products/Skin Care//Face/Cleanser</div> <div>Skin/Sensitive Skin</div>
<input type="checkbox"/>	<input type="checkbox"/> AQQ			0955*****		<div>Age/10+ Gender/Women Membership/Member</div> <div>Products/Makeup/Eyes/Brows Products/Makeup/Face/Blusher</div> <div>Products/Makeup/Face/Powder Products/Makeup/Lips/Lipstick</div> <div>Products/Skin Care//Face/Cleanser Skin/Sensitive Skin</div>
<input type="checkbox"/>	<input type="checkbox"/> AQQ			0968*****		<div>Age/20+ Membership/Member Products/Makeup/Eyes/Brows</div> <div>Products/Makeup/Face/BB Cream Products/Makeup/Face/Concealer</div> <div>Products/Makeup/Face/Powder Products/Makeup/Face/Primer</div> <div>Products/Skin Care//Face/Cleanser Products/Skin Care//Face/Moisturizer</div> <div>Skin/Normal Skin</div>





**Customer** Membership/VIP X Import Functions ▾ Tools ▾

Full Name  Created Date  Relative Created Date  
Created in the Last  day(s) Search

Days not Contacted  
Customer has not been Contacted in the Last  day(s)

More Criteria ▾

**Customer List** Total 11 items / 1 pages

Tagging Delete Merge Search by First Alphabet Display Fields

<input type="checkbox"/>	Name	Social ...	Company	Mobile Phone	Landline Nu...	Tags
<input type="checkbox"/>	AOO			0930*****		<span>Membership/VIP</span> <span>Age/30+</span> <span>Customer Complaints/Quality of Service</span> <span>Gender/women</span> <span>Products/Makeup/Eyes/Eyeshadow</span> <span>Products/Makeup/Face/BB Cream</span> <span>Products/Makeup/Lips/Lip Gloss</span> <span>Products/Makeup/Lips/Lip Liner</span> <span>Skin/Normal Skin</span>
<input type="checkbox"/>	AOO			0926*****		<span>Membership/VIP</span> <span>Age/60+</span> <span>Gender/Women</span> <span>Products/Makeup/Lips/Lipstick</span> <span>Products/Skin Care//Body/Body Lotion</span> <span>Products/Skin Care//Face/Anti Aging</span> <span>Products/Skin Care//Face/Mask</span> <span>Products/Skin Care//Face/Moisturizer</span> <span>Skin/Mature Skin</span>
<input type="checkbox"/>	GOO			0975*****		<span>Membership/VIP</span> <span>Age/20+</span> <span>Products/Makeup/Face/BB Cream</span> <span>Products/Makeup/Face/Blusher</span> <span>Products/Makeup/Face/Bronzer</span> <span>Products/Makeup/Face/Highlighter</span> <span>Products/Skin Care//Face/Cleanser</span> <span>Products/Skin Care//Face/Moisturizer</span> <span>Products/Skin Care//Face/Toner</span> <span>Skin/Sensitive Skin</span>

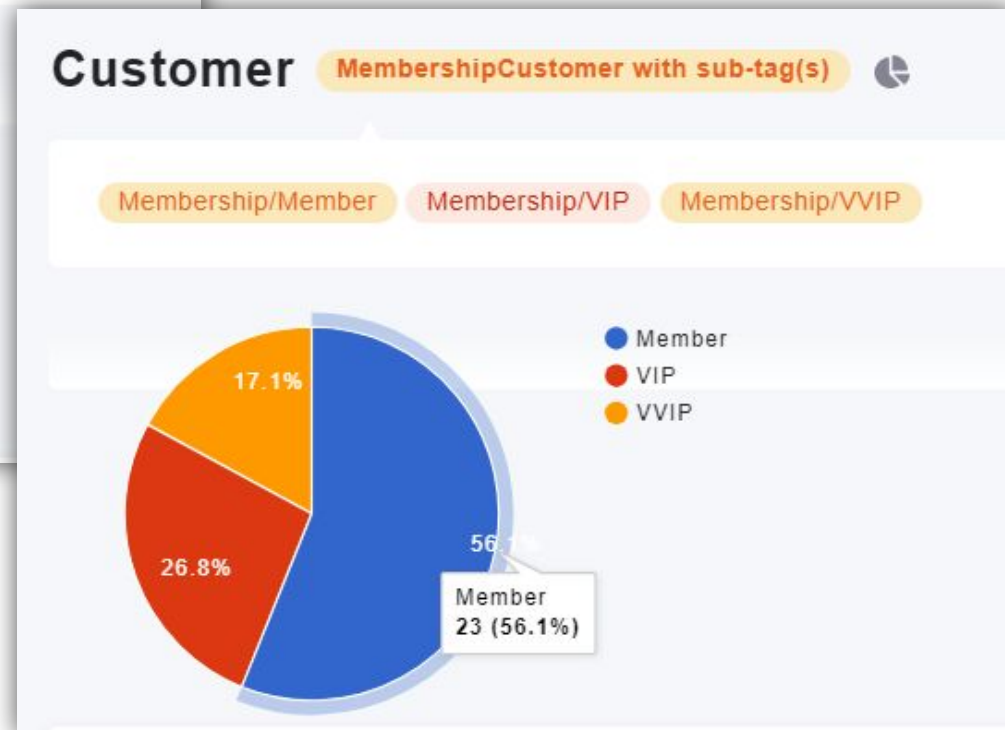
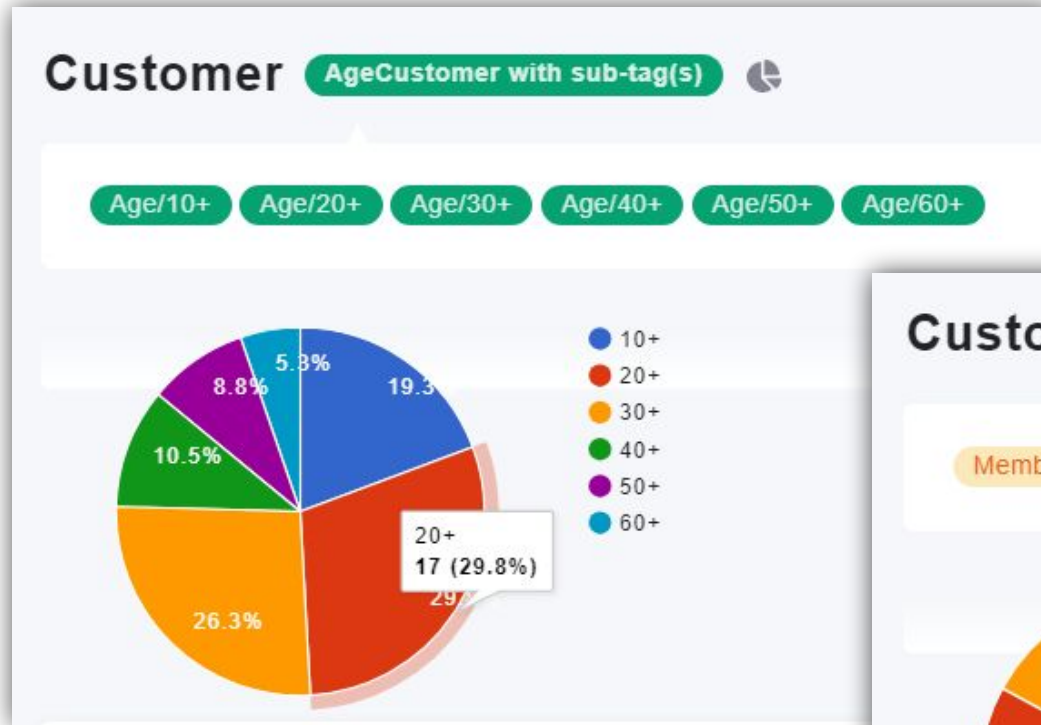
**VIP  
Customer**



VITAL CRM

# Tags-Focus Marketing

## ■ Graphic Analysis of customer attributes



Purchases ☐ Find Customer without Order.

Previously Purchased [+Add](#) **Purchase Behavior**

Brightening Toner [×](#)

Never Purchased [+Add](#)

**Filter according to purchase amount**

Order within

Order within Last  days

Total Number of Orders greater than

Total Amount greater than

- Quickly select target customers based on purchasing behavior, consumption amount, etc.

Full Name

Created Date

Relative Created Date  
Created in the Last  day(s)

Days not Contacted  
Customer has not been Contacted in the Last  day(s)

Tags

Multiple Tags [+ Add](#)

One of the tags [+ Add](#)


Tags Excluded [+ Add](#)

Customer Information

Gender  
 ▼

Age  
 ~

Nationality  
 ▼

Has at Least Relatives and Friends  
 

External ID  
 ▼

Export Excel File

Print Mailing Labels

Send Email

Add Tag(s)

Remove Tag(s)

Set Permissions

Run Marketing script

Add Case

Show Customer Clusters

Add Calendar Event

Random Grouping and Add Tags



# Purchase Analysis - Based Marketing

- Find your VIP Customers with ease

By Duration
Total Order

Order Date  
2023/11/01 - 2023/11/30

First Order day  
Enter text

Order within  
Enter text

Order Information

Number of Orders  
>= 1

Order Amount  
>=

Sales Representative  
Enter text

## Order's Customer List Total 10 items / 1 pages

										Display Fields ▼
<input type="checkbox"/>	Name	Company	Amount in the Period	Orders in the Period	Total Amount	Total Orders	Average Amount	Order within	First Order day	
▶ <input type="checkbox"/>	ROO		130	1	130	1	130	2023/11/25	2023/11/25	
▶ <input type="checkbox"/>	AOO		140	1	276	3	92	2023/11/18	2023/09/27	
▶ <input type="checkbox"/>	AOO		206	3	206	3	68.667	2023/11/15	2023/11/04	
▶ <input type="checkbox"/>	AOO		285	1	405	2	202.5	2023/11/16	2023/09/27	



VITAL CRM

**Scenario:**

Focus marketing based on customer preferences for coffee beans

**Success Story:**

Idou.com 愛豆網

**Industry Category:**

E-commerce

- Customers are treasures.
- Want to conduct segmented marketing: white-collar workers, corporate executives, premium users, and family users.
- Planning for segmented marketing with refined customer service but lacking a comprehensive tool.

The screenshot shows the Idou.com website with a prominent coffee promotion. The main banner features a green background with a coffee machine and a bag of coffee, advertising a 'Buy 10 bags, get 1 bag free' deal for 99元. The website header includes navigation links for coffee beans, drip coffee, coffee gifts, products, coffee tools, and a shopping cart. A sidebar on the right promotes a 'Black Gold Coffee' set for 1399元. A bottom section titled '最新消息' (Latest News) lists updates about coffee products and pricing.

**Idou.com 愛豆網**  
www.idou.com.tw

電子報 品牌 ATM 匯款通知

咖啡豆 手工掛耳濾泡咖啡 掛耳禮盒/即溶/缸 週邊產品 咖啡器具 留言板

輸入商品關鍵字

全館咖啡豆消費滿千元 即**咖啡豆買二送一** ·單次消費滿2000元·升等VIP會員·永享咖啡豆買二送一  
可任選二種不同商品·贈品以低價為主

**下殺特惠組合 搶購**  
黑金咖啡濾杯套組

BLACK GOLD COFFEE DRIPPER  
原價2775元  
**特價1399元 搶購**  
搶購價:1399元  
市場價:2775元  
立即搶購

**NEW-OKLAO 沖繩黑糖奶 咖啡豆買二送一 綜合風味特價99元(10入1 歐客佬即溶系列**

**最新消息 Notice**

- ◆【特選藍山咖啡】掛耳-目前缺貨!!
- ◆8/1新豆上市
- ◆99元外包裝袋標示錯誤
- ◆大陸、香港運費計算?
- ◆一次購買25元連續掛耳包100包,多少錢?

**新鮮上架 堅持原味**  
對於品質我們堅持新鮮研磨·手工後製·  
品嚐最新鮮原味咖啡·是我們的堅持!!


**手工掛耳式咖啡任選50包5折**  
此活動不包含掛耳式禮盒/50袋包裝99元綜合風味  
及25元連續掛耳包




Founder: "We are currently working hard to rapidly import these member data into VIdegree, categorizing them in detail into VIP, corporate groups, coffee enthusiasts, schools, overseas, and other label groups. This allows us to employ different marketing strategies based on the diverse characteristics of our customer segments."



**Customer**

AOO 


Add Pictures 


Guest/Company Dinner X Liquor Scent/ Fruit Wine X

CEO Fruity Preference


Enter your note here

[News Feed](#) [Company Notes](#) [Order Details](#) [Communication Records](#) [Change Log](#)


 Refresh Type All ▾ Sort by Last modified ▾ | Date of


 **GOO**  
 2023/11/23 09:57  
 Restricted Access / AOO / Formatted

Caller notified that this batch of Colombian coffee is more acidic than before, has tropical fruit aroma, and has good flavor.

 Add a comment...

**Customer** [Back to Customer List](#)

JOO 


Add Pictures 


Business Executive X Premium Product X

Executive Roasted Preference

Enter your note here


[News Feed](#) [Company Notes](#) [Order Details](#) [Communication Records](#) [Change Log](#)

 Refresh Type All ▾ Sort by Last modified ▾ | Date of O

 **GOO**  
 2023/11/23 09:48  
 Restricted Access / JOO / Formatted

colombia huila los lagos geisha washed Drip Coffee Bags  
 Store Price: \$100  
 Quantity: 10 bags

Gift: R. S. W. Top-quality PANAMA Finca Lerida Geisha Washed Contract Farming Lot Drip Coffee Bags x2 (Price: \$120)

 Add a comment...

## Detailed recording of customer product purchases

- Tagging to record customer preferences for product types and sending EDM (Electronic Direct Mail)
- Including a trial pack when shipping (Buy 10, Get 5 Free)



「 全台唯一農場直營產銷合一，  
世界各國的好咖啡，  
吳若權真心推薦。」

2016 歐客佬咖啡  
年度代言人  
知名作家 吳若權

吳若權

IDOU COFFEE::愛豆網::線  
上購物網  
食品 / 飲料

立即購買 讚 發訊息 ...

首頁 關於 相片 按讚分析 更多 ▾



No longer spending a fortune on advertising, CRM boosts idol fan network performance.  
Monthly revenue increased from 4,300 to 430,000 NT dollars.



VITAL CRM

**Scenario:**

Use the CRM tag function to summarize and classify tens of thousands of customers

**Success Story:**

WasangShow

**Industry Category:**

Cultural and Creative Industry

"Vital CRM's tags really did a great job! It's like a classification feature that allows flexible settings based on one's needs. For example, categorizing customers by various criteria such as store locations, membership levels, product types, or gender. It makes it easy to organize thousands or even millions of customer data entries according to different categories, allowing us to find the most valuable customer segments in a multi-dimensional way," praised Derla.







**Thank You!**