Using Categories for Customers

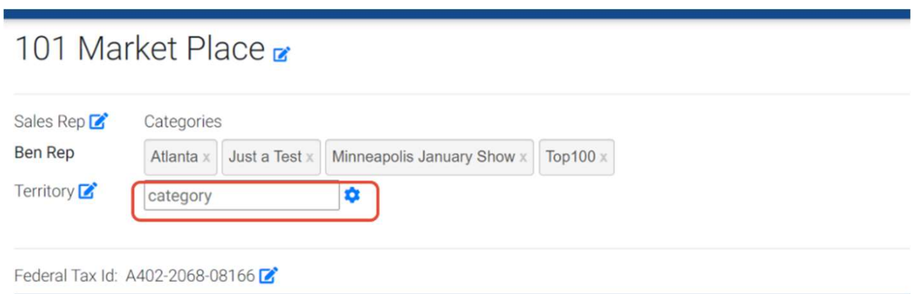
In this FAQ you will learn the benefits of using Categories for Customers in RepDesk. With Categories you can group together seasonal customers, verticals or any group that makes sense for your reps. Reps will be able to search for their customers associated with that category, helping them become more organized.

Note* Below steps can be used by reps with regular access and admin access.

Step 1.
Go into the customer profile.

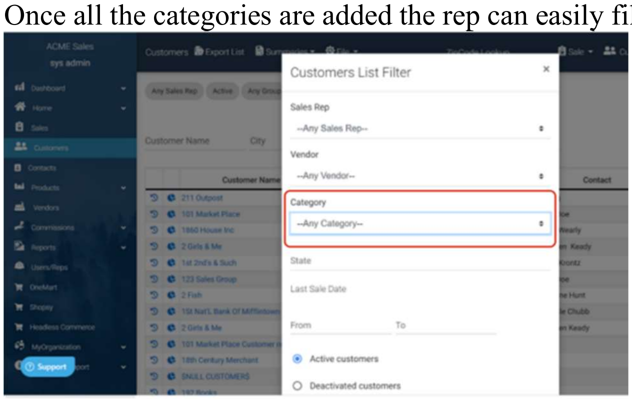
Step 2.
Add the category name in the field that says "categories" and press enter. That will add the category permanently.

This means when you go into another customer profile and search in the “category box” that category name will be there as an option to add.



Now just repeat the process for all customers. You can also drill down and add more sub-categories to refine their searches.

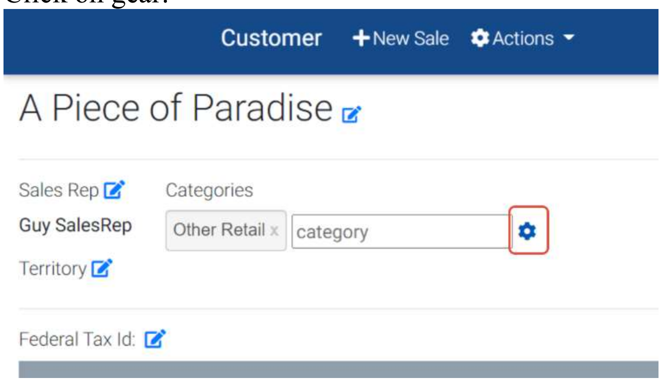
Once all the categories are added the rep can easily filter for them in the customers list filter.



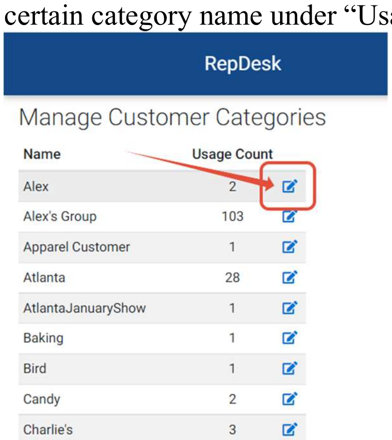
Gear Function for Customer Categories

The gear function for customer categories is used to edit the name of the category and see how many customers are grouped under each category.
Note* For admin access only

Step 1.
Click on gear.



Step 2.
To edit the category name, click on the pencil. You can also see how many customers are tagged with a certain category name under "Usage Count."



Step 3.
Once you changed the name click save.