

# Customer Groups Configuration

04/30/2025 3:09 pm CDT

## Overview

Sellercloud's **Customer Groups** feature lets you easily organize and filter your customer list. In this article, you will learn how to configure and manage your customer groups, add customers to established groups, and adjust prices for customers in groups.

Once created, **Customer Groups** can be used as a filter on the [Manage Customers](#) page.

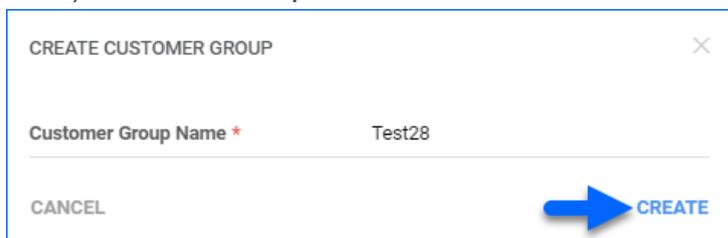
## Configure Customer Groups

Create, edit, or delete **Customer Groups** depending on your business needs.

### Create Customer Groups

To create Customer Groups:

1. Go to **Customers** > Click on **Customer Groups**.
2. Click the green + icon at the bottom right corner of the screen.
3. Enter your **Customer Group Name** and click **Create**.



CREATE CUSTOMER GROUP

Customer Group Name \* Test28

CANCEL CREATE

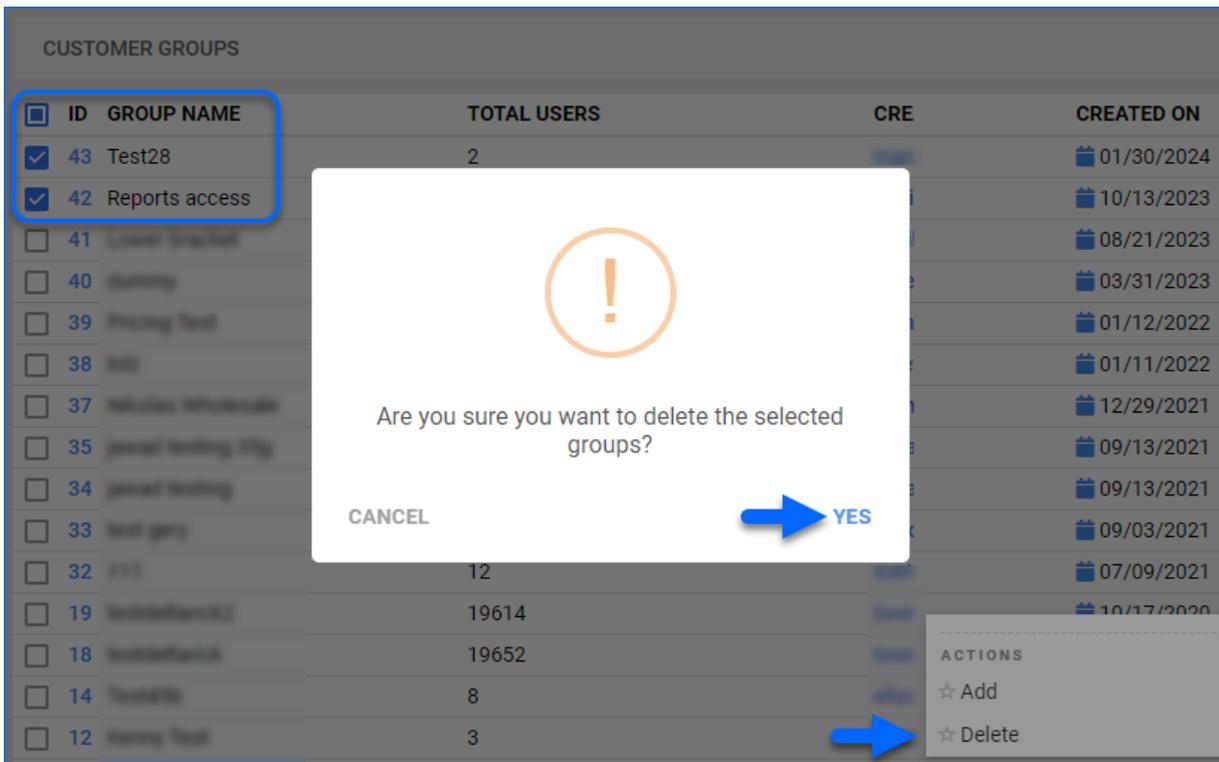
### Delete Customer Groups

To delete Customer Groups:

1. Go to **Customers** > Click on **Customer Groups**.
2. Click **Search** and select one or more groups from the grid.
3. Click the **Action Menu** on the bottom right and confirm the deletion.

Deleting a **Customer Group** does not delete the individual customers within it. They remain unaffected and continue to exist independently.

This action is irreversible and will delete the **Customer Group** permanently.



## Add Customer to Groups

You can add customers to groups individually or in bulk.

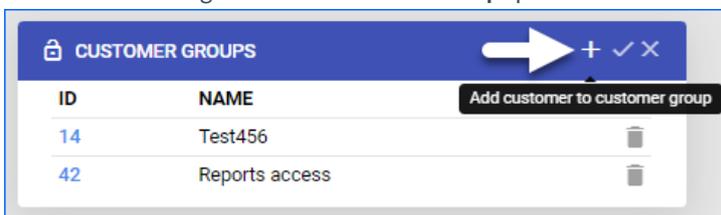
### Customer Level

You can add customers to groups from the Manage Customers page individually or in bulk.

#### Individually

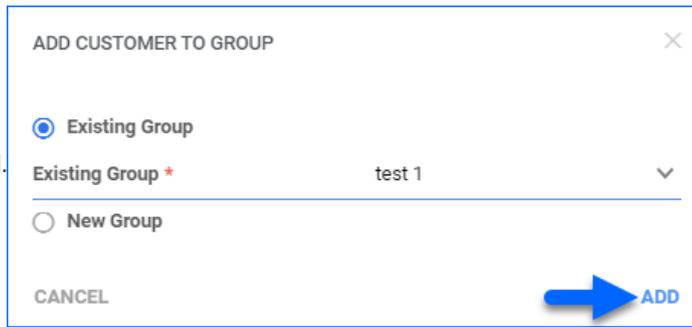
To add a customer to a group from the Customer Details page:

1. Go to **Customers** > Click on **Manage Customer** > Open a **Customer**.
2. Click **Edit** and navigate to the **Customer Groups** panel.



3. Click the + icon and select if you want to add the customer to an **existing** or **new** group.

4. Click **Add**.



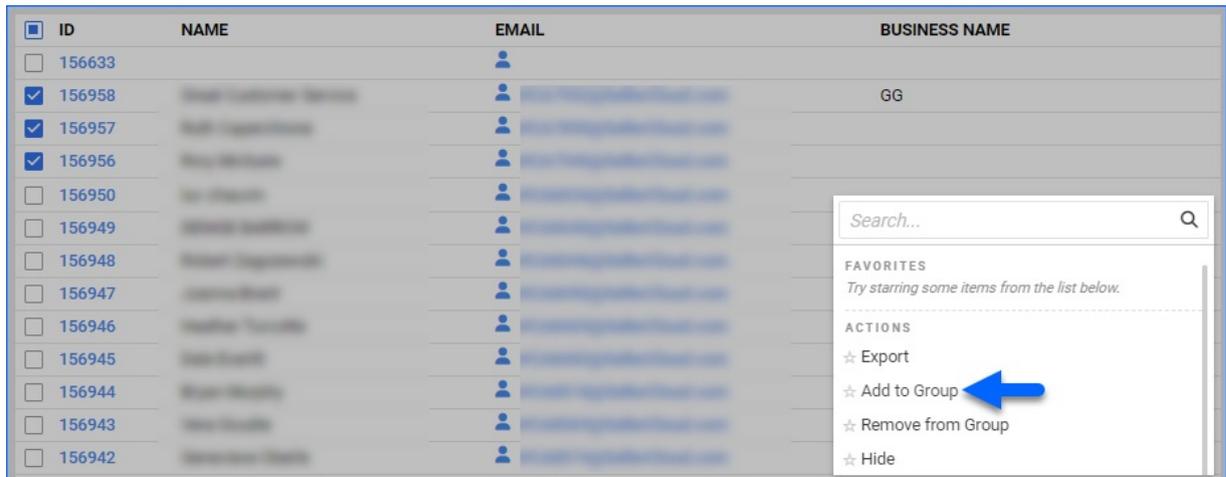
If you accidentally delete the group from the customer groups panel, you can **Undo the deletion** by clicking on the button again.

ID	NAME	
14	Test456	
41	Lower bracket	

## In Bulk

To add multiple customers to a group:

1. Go to **Customers** > Click on **Manage Customers**.
2. Select **Customers** > Click on **Action Menu** and select **Add to Group**.



ID	NAME	EMAIL	BUSINESS NAME
<input type="checkbox"/>	156633		
<input checked="" type="checkbox"/>	156958		GG
<input checked="" type="checkbox"/>	156957		
<input checked="" type="checkbox"/>	156956		
<input type="checkbox"/>	156950		
<input type="checkbox"/>	156949		
<input type="checkbox"/>	156948		
<input type="checkbox"/>	156947		
<input type="checkbox"/>	156946		
<input type="checkbox"/>	156945		
<input type="checkbox"/>	156944		
<input type="checkbox"/>	156943		
<input type="checkbox"/>	156942		

3. Select if you want to add the customer to an **existing** or **new** group.
4. Click **Add**.

## Group Level

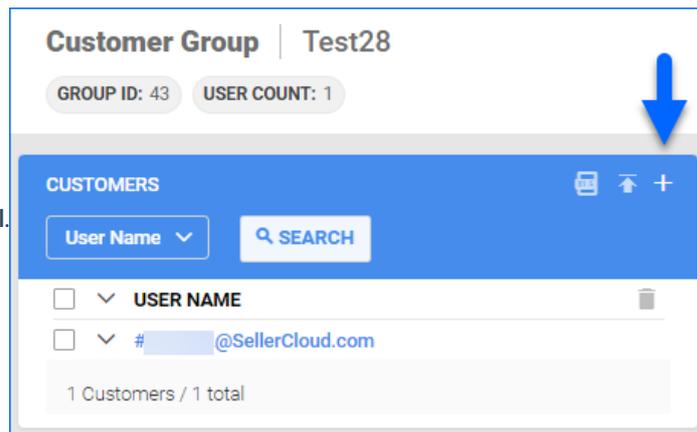
You can add customers to groups from the **Customer Groups** page, individually or in bulk.

### Individually

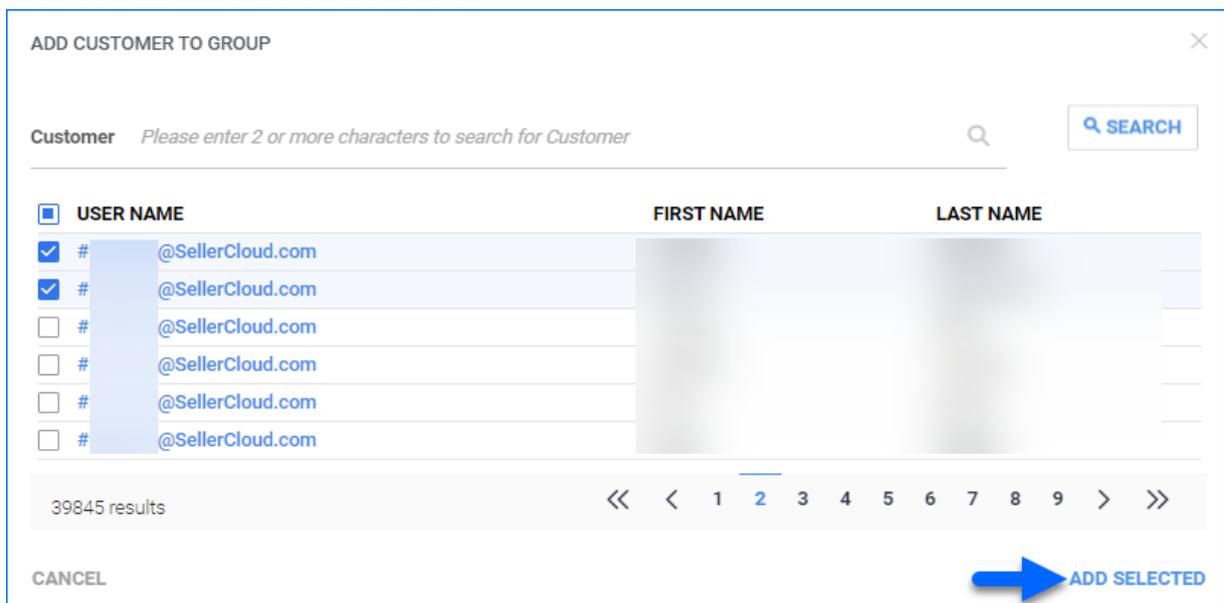
To add customers individually, navigate to:

1. Go to **Customers** > Click on **Customer Groups** and open a **group**.

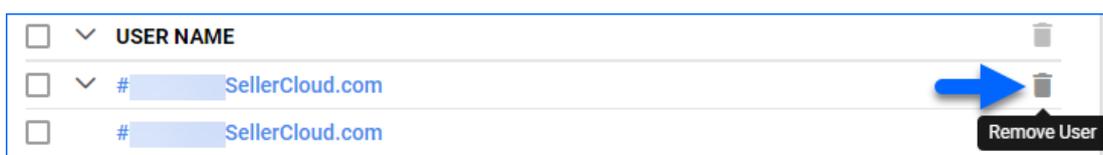
2. Click the + icon in the Customers Panel.



3. Select customer/s and click on Add Selected.



To delete customers from the group, click the **Trash** icon next to each customer in the grid.



## In Bulk

To add multiple customers to a company in bulk:

1. Go to **Customers > Select Tools > Import Customers**.
2. To import customer information via **Plugin** or **Import Mapping profile** select one from the dropdown menu next to **Import Via Plugin**.
3. Select a **File Type** > Click the **Download** icon to download a template file.
4. Enter the appropriate group name into the column **UserGroupName**. The group name must exist in Sellercloud beforehand.
5. Save the file and go back to Sellercloud to upload it.

- a. You can enable the checkbox **Plugin Doesn't Require Input File** in cases where the plugin uses information directly from an external URL or 3rd party software.

6. Click **Import**.

IMPORT CUSTOMER INFO	
Import Via Plugin	General
File Type	Excel
File	ImportCustomersTemplate.xls
<input type="checkbox"/> Plugin Doesn't Require Input File	
	

## Prices for Customers in Groups

If you have a specific range of customers you want to discount products for, you can group them accordingly and upload product prices.

Every time you add new customers to groups, product prices must be imported simultaneously, as they do not synchronize automatically.

To download the Price template and upload prices back to the group, navigate to:

1. Go to **Customers** > Click on **Customer Groups** and open a **group**.
2. Click on **Download Prices for Customers in Group Template**.

Customer Group   Test28	
GROUP ID: 43	USER COUNT: 1
<b>CUSTOMERS</b>	
User Name	SEARCH
<input type="checkbox"/> USER NAME	
<input type="checkbox"/> #	SellerCloud.com
1 Customers / 1 total	

3. An Excel sheet containing the following will be downloaded to your device:
  - a. **SKU**
  - b. **Wholesale Price**
  - c. **Start Date**
  - d. **End Date**
4. Populate the required information and go back to Sellercloud.
5. Click on **Upload Prices for Customers in Group Template**.

6. Drag the newly created file.

7. Click **Upload**.

## Understanding customer groups

To create a customer group:

1. Go to the **Customers** tab > **User Groups**.
2. Enter a **Group Name** > Click **Create New Group**.
3. You can click **Edit** to view/edit a group's information. You can also check a group > **Action** menu > **Delete** > **Go** to delete a group.

Home > Customers List > User Groups

Group Name:  Create New Group

Existing Groups

Select Action

	Group Name	# of Users	Created By	Created On
<input type="checkbox"/>	Edit	1		05/18/2020 10:14 AM
<input type="checkbox"/>	Edit test group	2		11/23/2017 04:35 AM
<input type="checkbox"/>	Edit some customers	0		11/06/2017 01:03 PM
<input type="checkbox"/>	Edit Test456	6		07/24/2020 07:56 AM
<input type="checkbox"/>	Edit test56565	0		01/06/2021 01:27 PM
<input type="checkbox"/>	Edit pie	1		12/06/2017 10:18 AM
<input type="checkbox"/>	Edit Kenny Test	3		06/16/2020 01:45 PM
<input type="checkbox"/>	Edit best customers	4		01/19/2017 04:20 PM
<input type="checkbox"/>	Edit test123	1		05/21/2020 09:14 AM
<input type="checkbox"/>	Edit testdeltarick	19624		10/17/2020 09:34 AM
<input type="checkbox"/>	Edit testdeltarick2	19614		10/17/2020 09:37 AM
<input type="checkbox"/>	Edit test 1	3		01/09/2017 05:43 PM

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## Adding customers to a group

You can add customers to a group in bulk or individually.

To add in bulk, the **customer group** must already be created. New and existing customers can be added to groups in bulk through the **import customers** feature. Simply enter the appropriate group name into the column **UserGroupName**.

To add manually, the **customer account** must already be created. You can add customers individually in two ways:

- On the **Manage Customers** page, check your customers and select the action **Add to Group**. From there, you can add to an existing group or create a new group.
- On the **Customer Details** page: Select the group from the **Add user to Group** dropdown > **Save**.

