2. Clients: Use Cases

#1 Onboarding New Markets

Scenario: You're expanding into Europe and Latin America.
Solution: Create Projects "WBCS – EU" and "WBCS – LATAM." Onboard new clients into the appropriate project, then assign them to a local Desk (e.g., "Berlin Sales," "São Paulo Support") and manager. This keeps regional data strictly segmented.

#2 Tiered Support Levels

Scenario: You offer Basic, Premium, and Enterprise support plans.
Solution: In your main Project, set up Desks "Basic Support," "Premium Support," and "Enterprise Success." Assign each incoming client to the desk matching their plan, plus a dedicated account manager. This ensures SLAs and workflows are customized per tier.

#3 Multi-Brand Account Management

Scenario: Your company runs several brands under one umbrella.
Solution: Use separate Projects for each brand (e.g., "Acme Retail," "Acme Wholesale"). If a client buys from both, assign them to each project as needed, with desk and manager assignments per brand. They appear in both lists but stay logically partitioned.

#4 Cross-Functional Handoff

Scenario: A prospect moves from Sales to Implementation to Support.
Solution: Keep the client in a single Project but reassign their Desk and Manager at each stage: "Sales Desk" → "Implementation Desk" → "Support Desk." All history stays on one record, but only the current team sees them.

#5 Bulk Import & Segmentation

Scenario: You've run a marketing campaign and collected 1,000 new leads.
Solution: Use the API or import tool to upload all leads into your "Marketing Campaign" Project. Then apply a meta-tag (via the Additional/Meta picker) or assign them to "Campaign Desk." From there, route them in bulk to regional sales desks through filters or automation.

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