

WeChat Work 3.0

2020 Platform Overview

企业微信3.0概观

WeChat Work is uniquely important among China's workplace collaboration apps

WeChat has a monopoly on consumer messaging in China

Over the last two years, Tencent has re-positioned WeChat Work as the business backend for WeChat: sales, CRM, customer service, and much more

Internally: Enable
the efficient flow of
information

Externally: Connect
1.1B WeChat users

WeChat Work 2019
Annual Conference
企业微信2019年度发布会

"Hello WeChat Work"

December 23, 2019

对内让信息流转高效 对外连接11亿微信用户



企业微信

“If WeChat Work was purely a tool for internal workplace messaging, I think its scope and significance would be much smaller. Only when it extends outside the enterprise does it produce greater value. People are the service.

Allen Zhang
Founder of WeChat

“企业微信如果单纯定性为企业内部的沟通工具，我认为它的场景和意义会小很多。只有它延伸到外部的时候，才会产生更大的价值。人即是服务。

张小龙



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What is WeChat Work?

The high-level concepts explained in simple terms

什么是企业微信？

WeChat Work is like having a custom version of WeChat just for your organization.

You control who gets to join your account.

You choose what apps and mini-programs your team needs.

Create as many internal official accounts and groups as you need to manage communication effectively.

WeChat Work is like WeChat plus



Video Conferencing

Free audio and video calls with up to 300 people



Tasks & Calendars

Seamlessly integrated into chat, right where you need it



Company app store

Deploy internal and third-party apps to any employee group



Document collaboration

Docs and sheets that can be edited from mobile and desktop



WeChat CRM

The only app that is a true WeChat CRM backend



Announcements

Like WeChat OAs but higher volume and easy segmentation



User Management

You control who joins your account, including easy removal

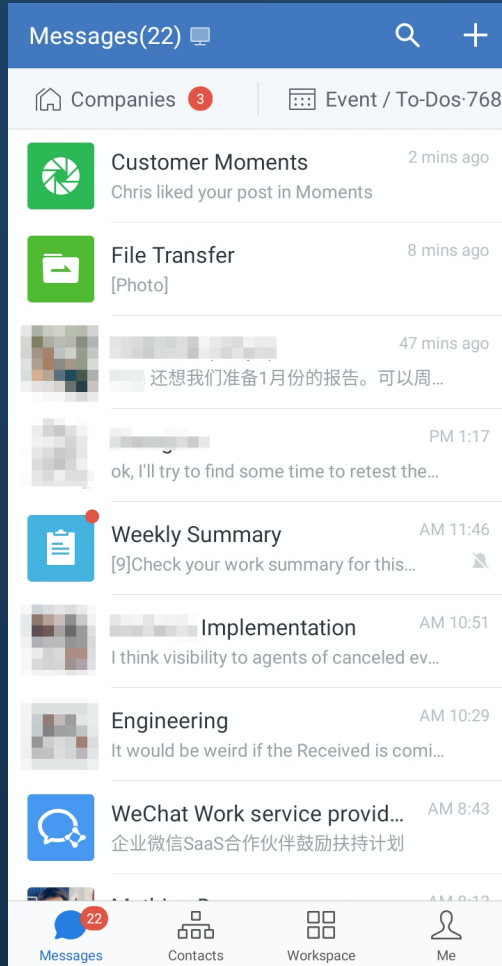


Enhanced security

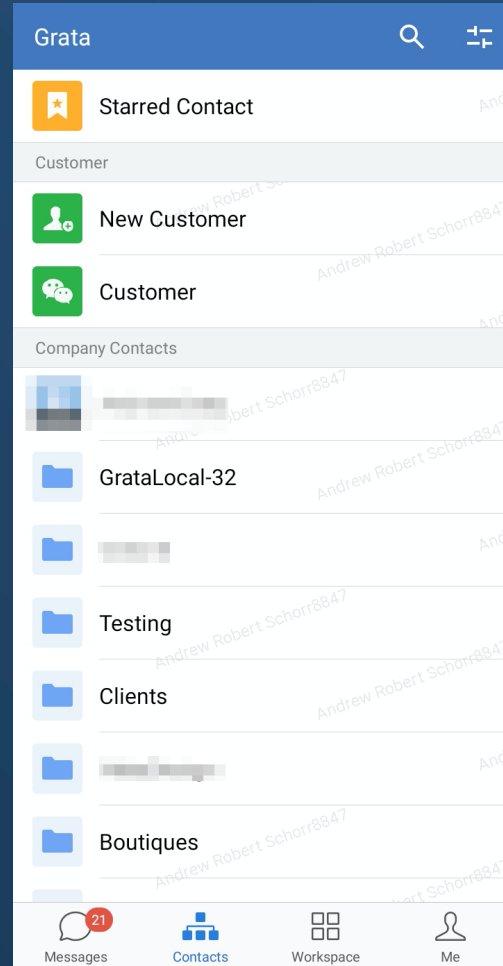
Custom policies to protect privacy and data security

WeChat Work Mobile App

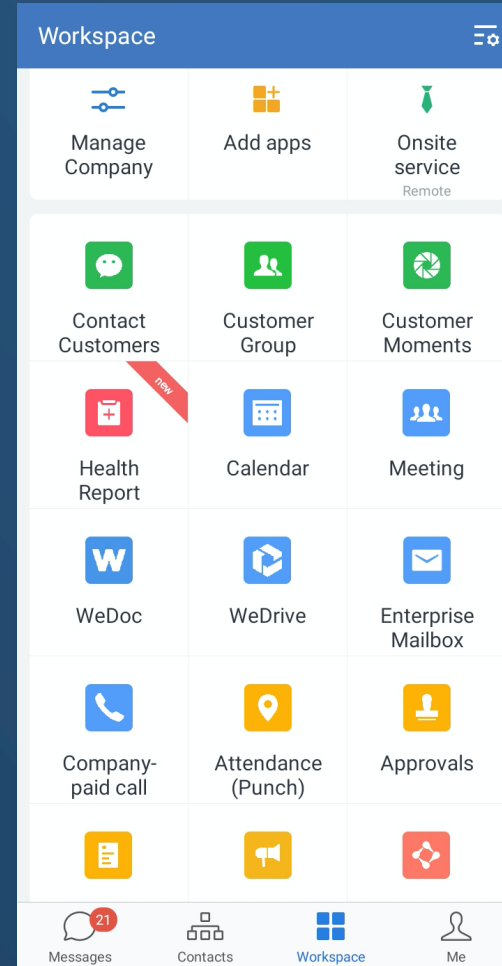
Chats and Apps



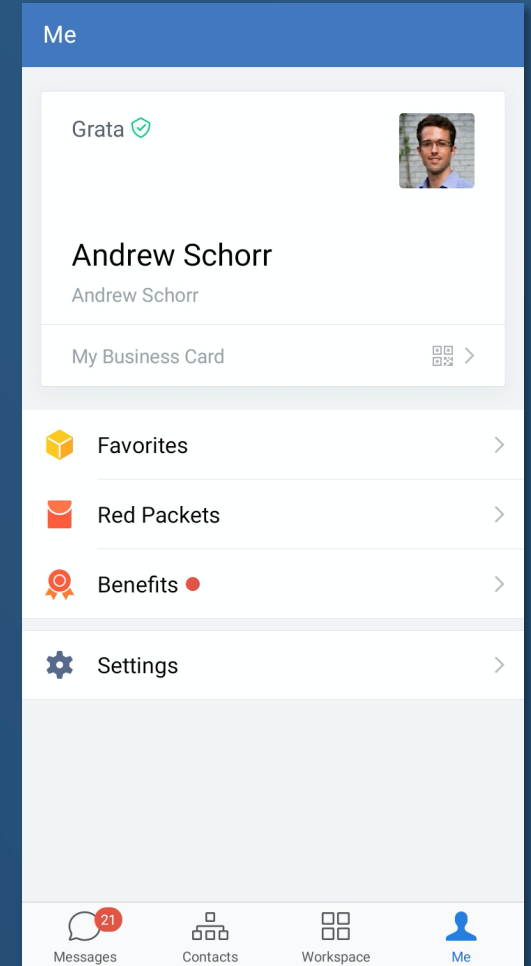
Contacts



App Workspace



Settings



A short history of WeChat Work

When WeChat started getting popular in 2011, lots of people quickly started using it at work, too. This was generally a good thing, but it was not without friction between management and employees.

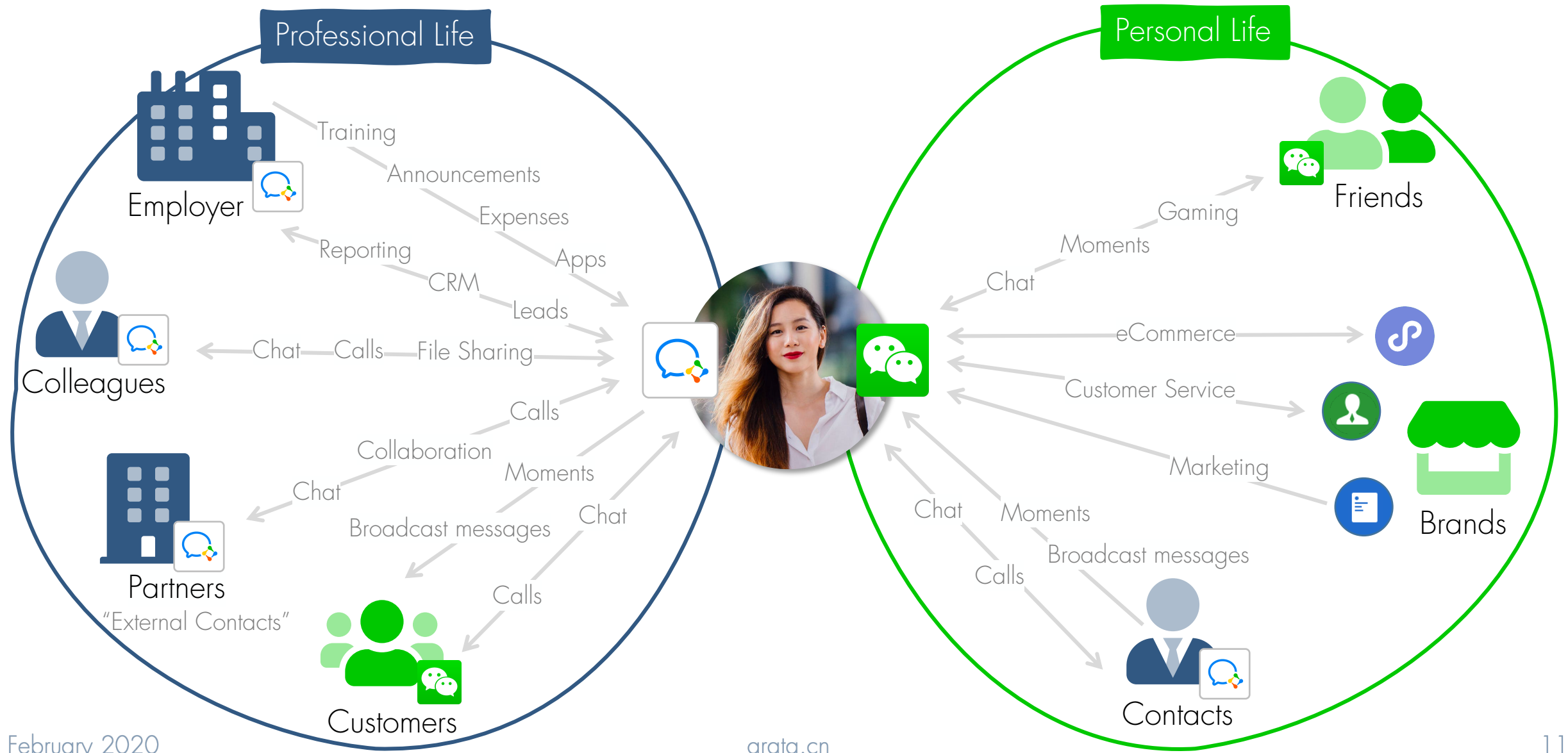
WeChat began to address this friction in the fall of 2014 with **Enterprise Accounts** (企业号), which worked within WeChat. These only started getting interesting in the summer of 2015 when the addition of **enterprise messaging** (企业消息) meant you could group all your work messages into a separate folder in WeChat.

In April of 2016, Tencent broke out the enterprise functionality into a separate app and renamed it 企业微信, eventually settling on the English name

WeChat Work. A separate app naturally upset everyone, until we came around to the idea that it was helpful for restoring a bit of work-life balance. It also meant Tencent could make faster progress building out the core apps and features businesses expected in a productivity and collaboration tool.

At the WeChat developer conference in January 2018, Allen Zhang announced that making WeChat Work and WeChat interoperable was one of the major focuses of his team. Four months later **“WeChat Connect”** (连接微信) was released in closed beta. Each new app update increased its scope, eventually renaming the feature simply **Customers** in early 2019.

Help employees separate their business and personal lives



Frequently asked questions (1 of 2)

Do employees have to download a new app?	How much does it cost?	Is it available in English?	How long does it take to register?
<p>No</p> <p>You can enable the "WeChat Workplace" (微工作台) feature which allows colleagues to send and receive messages and notifications from within WeChat.</p> <p>Note that WeChat Work apps and some message types are not supported in WeChat Workplace.</p>	<p>It's free</p> <p>You don't have to pay for WeChat Work unless you need advanced features like WeChat Pay and WeChat Customers. Those require a 300RMB verification fee every two years, but you can share your company verification from an existing Official Account.</p> <p>You can choose to purchase additional cloud storage space or phone minutes to dial out. Also, many third-party apps have paid tiers.</p>	<p>Yes</p> <p>The desktop and mobile app, the admin backend, and the help center are mostly translated in English.</p> <p>It's definitely usable for non Chinese speakers, though you will come across some sections that have not been translated yet.</p> <p>The developer documentation is only available in Chinese.</p>	<p>Less than a minute*</p> <p>*If your organization already has a WeChat Official Account, you can clone a WeChat Work account from your WeChat Official Account backend and not have to re-enter all of your organization information.</p> <p>If you're new to WeChat, you'll have to submit a bit more information to get started, but it's gotten a lot easier over the years.</p>

Frequently asked questions (2 of 2)

Is this only for Chinese organizations?	Are people using WCW?	Where is my data stored?	Can I export my chat history?
<p>Yes</p> <p>WeChat Work is limited to Mainland China enterprises, government bodies, and organizations.</p>	<p>Yes</p> <p>The latest numbers that Tencent has shared are 2.5 million organizations and 60 million users. They also report that 80% of the top 500 organizations in China and 81% of the top 100 retail organizations have adopted WeChat Work.</p>	<p>It depends</p> <p>All of your chat data is stored on Tencent's servers. If you use WeDoc and WeDrive for cloud file storage, those files are also on Tencent Cloud.</p> <p>If you access you own internal applications and file systems using WeChat Work's web browser, these would not be stored on Tencent's servers.</p> <p>Optional third-party applications will store your data on their own servers.</p>	<p>No*</p> <p>*Since WeChat Work disabled the enterprise messaging API several years back, you are no longer able to sync company chats to your own server. It is rumored, however, that organizations in select industries with compliance obligations (eg. banking) can still get access to their chat history. You need to know someone at Tencent to help you.</p>

China's workplace messengers

How WeChat Work stacks up against the competition

企业微信的竞争

China's workplace messengers



钉钉 "DingTalk"

China's dominant workplace messenger. Alibaba's app launched January 2015 and defined many of the features and tools of this category



企业微信 "WeChat Work"

WeChat Enterprise Accounts launched as a new type of WeChat Official Account in September 2014. WeChat Work was broken out into a separate app in April 2016.



飞书 "Lark"



Rising star ByteDance, of TikTok fame, officially launched Lark in April 2019. Lark is big on collaboration tools and ByteDance has proven that they know how to build international products



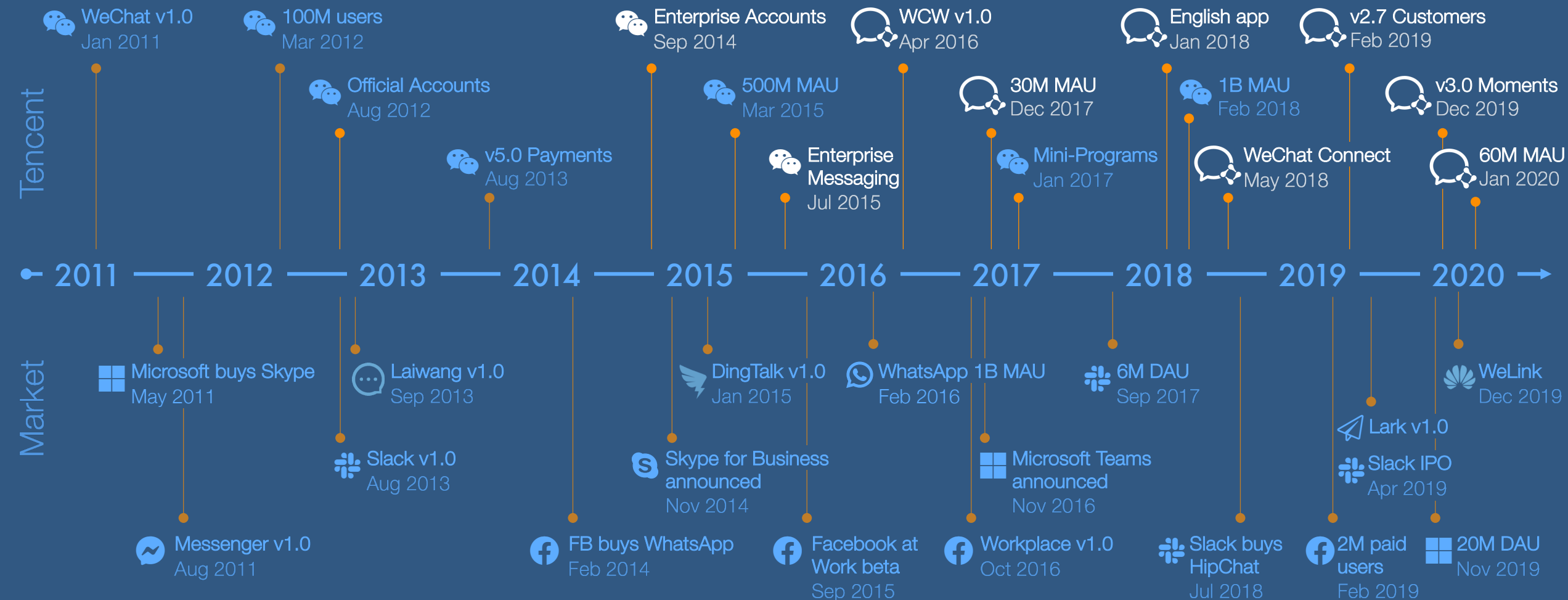
华为云WeLink "WeLink"

WeLink v1.0 started as an internal Huawei app back in January 2017, only launching publicly in December 2019. It claims 1,000+ companies and 195,000 users.

High-Level Comparison

High-Level Comparison			DingTalk 钉钉	WeChat Work 企业微信	Lark 飞书	Huawei WeLink 华为WeLink
	Parent Company	总公司	Alibaba	Tencent	ByteDance	Huawei
	Public Launch	公开发布时	Jan 2015	Apr 2016	Apr 2019	Dec 2019
	Customers (companies)	用户数（组织）	10,000,000	2,500,000	unknown	1,000+
	Customers (users)	用户数（同事）	200,000,000	60,000,000	unknown	340,000
	Free tier	免费层	>500 users requires verification (free)	>200 users requires verification (¥300)	Some feature limitations but no evident user limits	<200 users and up to 1 year
	Fees					
	User accounts	用户数	Free	Free	¥20, ¥50, or ¥200 tiers per user per month	¥210, ¥280, or ¥330 per user per year
	Cloud Storage	云盘量	¥10,000/TB/year	¥8,000/TB/year	Unlimited storage at enterprise tier	¥10,000/TB/year
	Calls & Conferencing	电话及会议	Free VoIP calls; ¥100 for 1000 min to call out	Free VoIP calls; ¥60 for 1000 min. to call out	Unlimited conferencing at business tier+	¥1500/seat/year for conferencing
	Other	其他	Message encryption, SMS notifications	-	Features vary by tier	Hardware, PSTN lines

The evolution of WeChat Work



Feature Comparison

		DingTalk 钉钉	WeChat Work 企业微信	Lark 飞书	Huawei WeLink 华为WeLink
OrgChart	组织结构管理	✓	✓	✗	✓
Email	电子邮箱	✓	✓	✗	✓
Calendar/Tasks	日历/任务	✓	✓	✓	✓
Free VoIP/Video Calls	免费视频会议	Max 302 people	Max 300 people	Max 10pp, 50min	Max 10pp, 40min
Free cloud storage	免费云盘量	100GB	100GB	10GB/user	50GB
Document Collaboration	文档协作	Smart Docs	WeDoc	Lark Docs, Sheets	WPS Office (Kingsoft)
Apps					
Approvals	公司审批	✓	✓	✓	✓
Punch Card	考勤打卡	✓	✓	✓	✓
Reporting	工作报告	✓	✓	✗	✓
3rd Party App Store	应用市场	✓	✓	✓	✓
Open Developer Platform	开放平台	✓	✓	✓	✓
Other					
Interoperable with WeChat	连接微信	✗	✓	✗	✗
Connected Hardware	智能硬件	✓	✓	✗	✓
English UI	英文界面				
App	应用界面	✓	✓	✓	✓
Admin Backend	管理后台	Mostly	Mostly	✓	Mostly
Documentation	帮助中心	✗	✓	✓	✗



DingTalk

Apart from interoperability with WeChat, DingTalk and WeChat Work are basically at feature parity.

🏠 Home dingtalk.com
📄 Help nh.dingtalk.com
📱 Apps appcenter.dingtalk.com
</> Devs ding-doc.dingtalk.com

Message shortcuts

A clever feature that perhaps we see in WWCW at some point: at the top of your chats window you can filter your messages by mentions, favorite contacts, messages you marked 'later', and files



External Contacts

DingTalk also has an external contacts (外部联系人) feature. Employees add customers manually, by batch import, or use an OCR business card scanner, but this is just a backend CRM function – it doesn't provide any benefit to customers. Customers and suppliers can only chat with your employees if they too are using DingTalk.

Message encryption

Optional paid subscription for double encryption (双重加密) on messages: one layer from Alibaba-invested DAS Security and one from DingTalk. DingTalk claims that no third party, including DingTalk, can read messages in your "private vault" (企业信息的私人银行).





Huawei WeLink

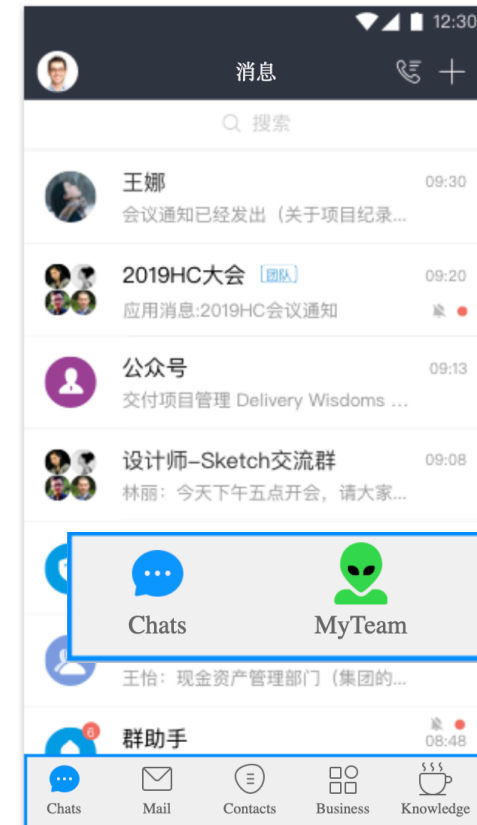
It's not clear to us how Huawei plans to compete against Alibaba and Tencent. WeLink's app interface, online documentation, and pricing strategy all feel like a previous generation of enterprise software.

WeLink claims to have 600 mini-apps (小程序), but we found only twelve apps in their third-party marketplace.

Huawei's app, admin backend, and their online tutorial videos are all noticeably slower to load outside of China, compared to Tencent and Alibaba products. Not a great advertisement for Huawei Cloud.

Until 1 June 2020 you can use WeLink for free with up to 1000 users and 100 video conference seats (unlimited call time).

Home welink.huaweicloud.com
Help support.huaweicloud.com/welink
Apps marketplace.huaweicloud.com/welink
Devs welink.huaweicloud.com/wecode



One fun thing with WeLink: you can customize the app navigation menu with your own icons and names.

You can also hide Mail and Knowledge sections.



Lark

Lark has a refreshingly modern design and a more differentiated product than the other three apps. While many teams would be happy with the free versions of Lark, the paid tiers may get expensive quickly for large organizations.

🏠 Home larksuite.com | feishu.cn

ℹ️ Help larksuite.help

📱 Apps app.larksuite.com

</> Devs open.larksuite.com

Clever Features

Lark looks a bit like Slack, and similarly has put a lot of thought into how to manage messaging in an era of information overload: thread tracking, pinned messages, rich text snippets, and a folder of muted chats you don't need to follow closely.

The calendar is beautifully integrated with the ability to view the schedule of everyone in a group chat, create a group chat from a calendar event, and a comment thread on the invite for scheduling issues.

Lark documents are edited in real-time with version tracking. Insert polls and links to group chats, and @ users to notify them about sections of the document.

Integrations

International users will see many integrations they recognize, like Google Calendar, Salesforce, Asana, Jira, Github, Jenkins CI, Trello, Expensify, and more.

Comparative annual subscription cost by company size

	DingTalk 钉钉	WeChat Work 企业微信	Lark 飞书	Huawei WeLink 华为WeLink
 Small Enterprise	¥1,000	¥800 💰	¥4,800	¥23,100 💰
 20 users	Free	Free	¥20/mo/basic user	¥6,600
 200GB cloud	¥1,000 for 100GB 100GB free	¥800 for 100GB 100GB free	10GB/user included	¥1,500 for 150GB 50GB free
 10 conferencing seats	302 included	300 included	50 min. calls at basic tier	¥15,000 for 10 seats
 Medium Enterprise	¥400,000	¥320,000	¥240,000 💰	¥569,500 💰
 400 users	Free	Free	¥50/mo/business user	¥132,000
 40TB cloud*	¥400,000	¥320,000	100GB/user included	¥400,000
 25 conferencing seats	302 seats included	300 seats included	25 seats at business tier+	¥37,500 for 25 seats
 Large Enterprise	¥2,000,000	¥1,600,000 💰	¥36,000,000 💰	¥6,275,000
 15,000 users	Free	Free	¥200/mo/enterprise user	¥4,200,000
 200TB*	¥2,000,000	¥1,600,000	Unlimited storage at enterprise tier	¥2,000,000
 50 conferencing seats	302 seats included	300 seats included	50 seats at enterprise tier	¥75,000

US\$1 = ¥7.0 RMB

* Cloud Storage

Cloud storage is really the only cost driver for DingTalk and WeChat Work. In order to make these comparisons as cleanly as possible, we have set cloud storage amounts based on Lark's paid tiers storage allotments. For organizations that do not need as much storage, DingTalk and WeChat Work are basically free, even at large scale.

The latest updates

Recent notable changes through WeChat Work v3.0.10

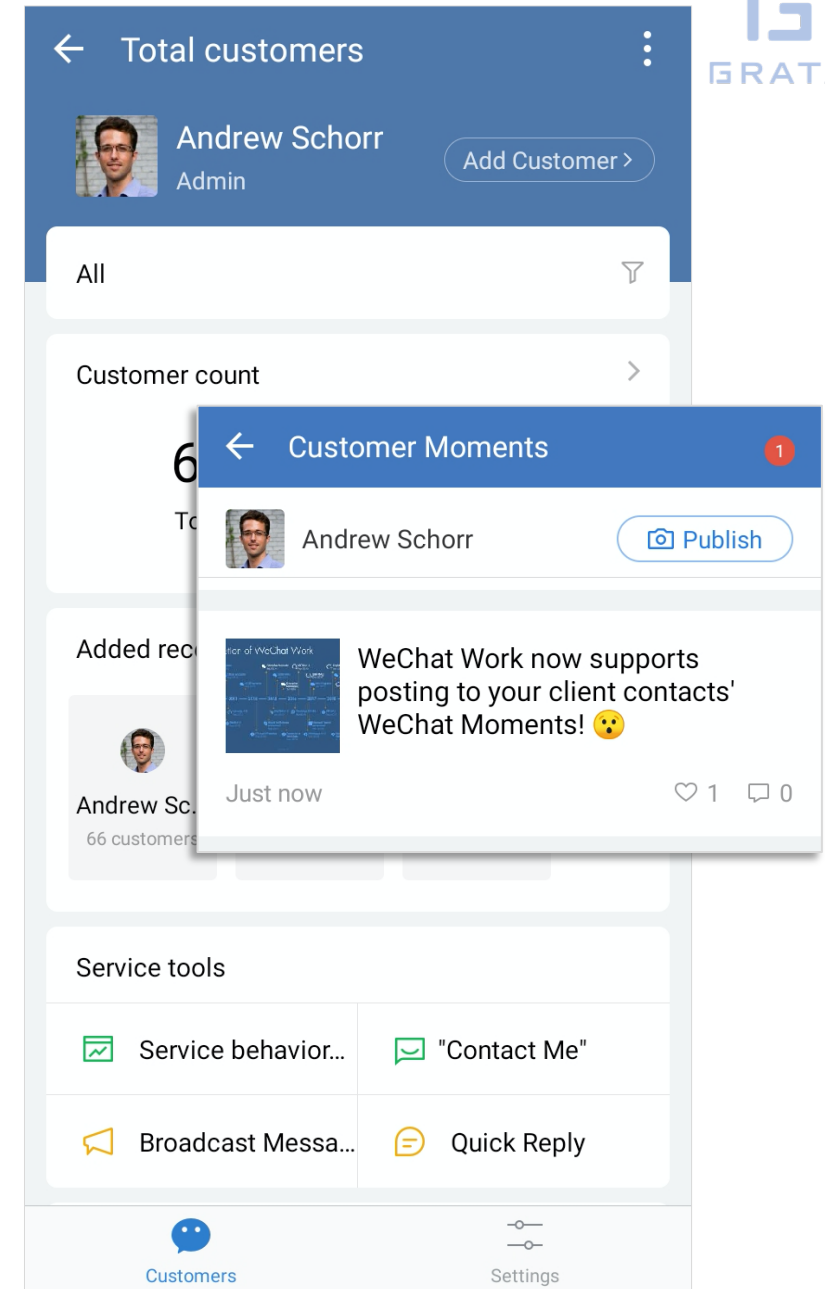
企业微信最近新功能

Customers

Employees using WeChat Work (WCW) can connect to their customers using WeChat. A major focus for Tencent.

What's new:

- **Employees can post to WeChat Moments**
- Company and employee targeted broadcast messaging
- Mixed employee/customer group chats increased to max 200 users
- Custom CRM profiles and tagging
- 'Contact Me' individual and team QR codes and Mini-Program buttons
- Chat sidebar app pages

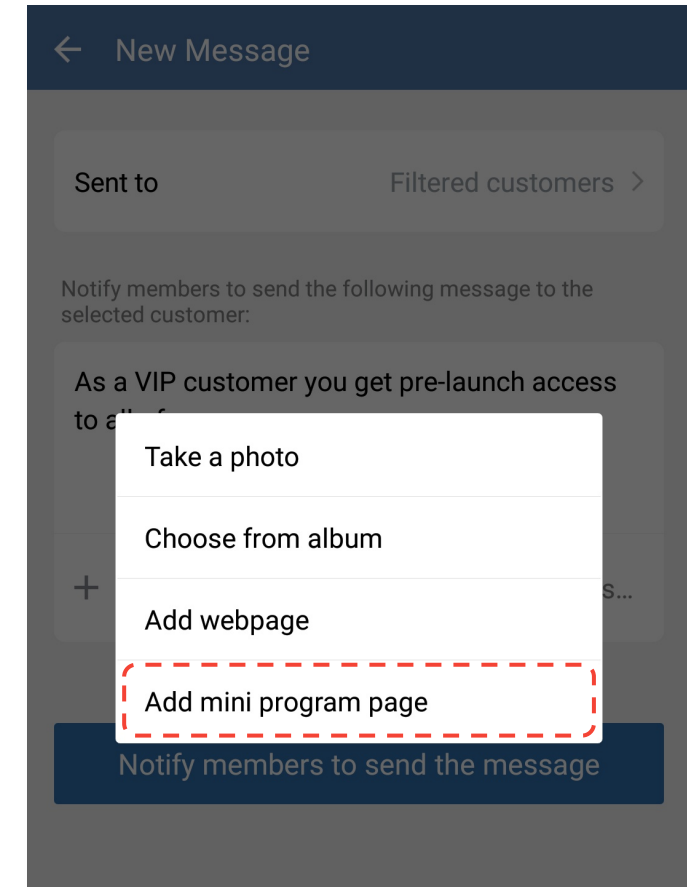


Mini-Programs

Mini-Programs are interoperable between WeChat and WeChat Work.

What's new:

- Bind MPs to your WCW account for employees to use
- Share MP pages to Customers via broadcast messaging
- Integrate staff 'Contact Me' buttons in your MP
- Develop internal MPs for employee use



Sharing a mini-program to Customers via WeChat Work broadcast message feature

Video Conferencing

The workplace messengers mean companies can save a lot of money on expensive video conferencing software subscriptions.

What's new:

- **Free video conferencing for up to 300 participants**
- Live stream from any group chat
- Invite external users from WeChat to join a meeting (external users must have WCW installed on their phone)
- Screensharing, HD voice and video, background blurring



Organize and manage your online meetings efficiently
A maximum of 300 people can join the meeting

Book meeting

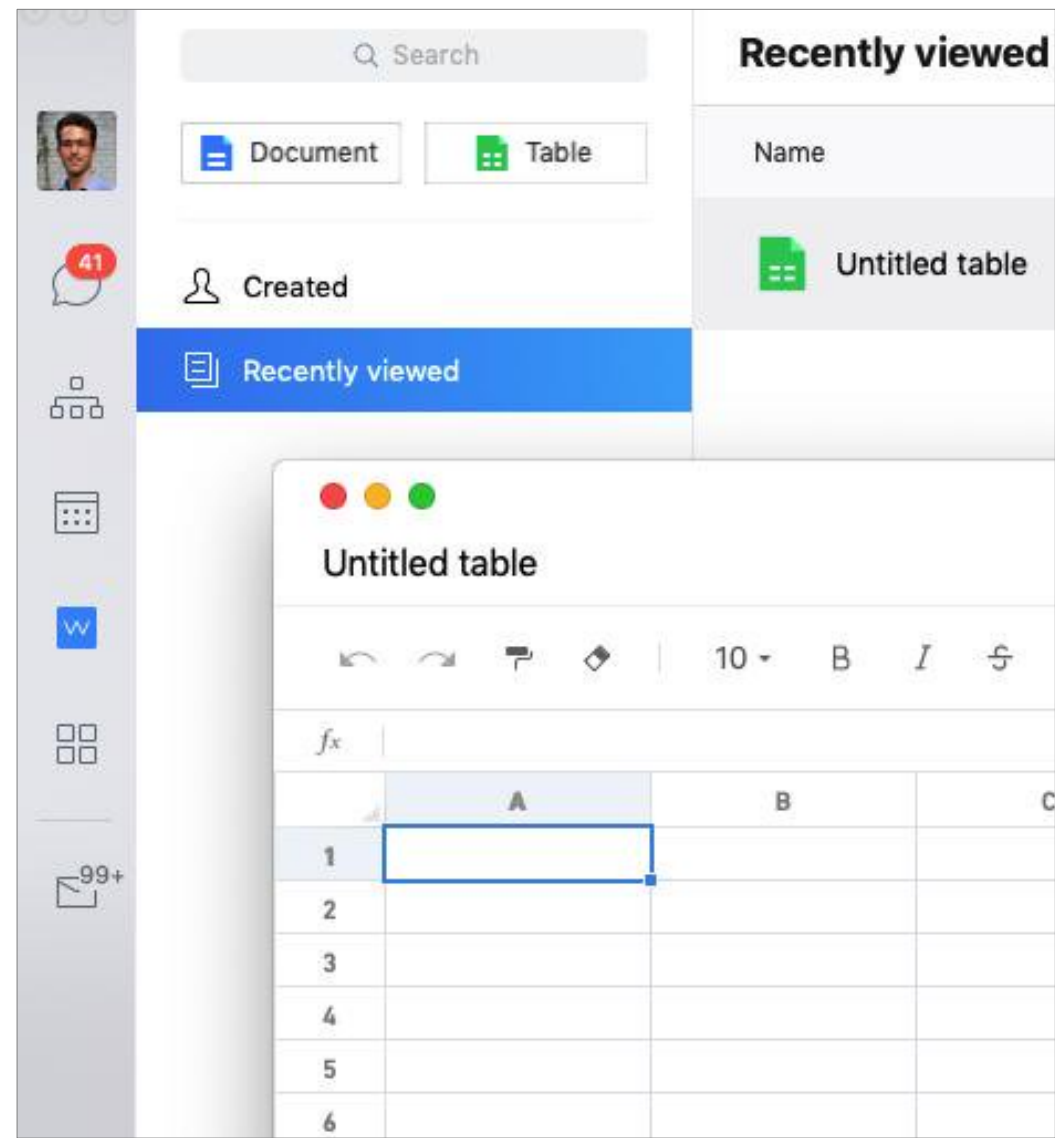
Start meeting now

WeDoc

Online real-time document and spreadsheet collaboration software.

What's new:

- Create and edit files from the mobile app, desktop app, and docs.qq.com that are interoperable with Microsoft Office.
- Works offline. Doesn't require a network connection.
- Set sharing permissions separately for internal and external users. Manage files in WeDrive cloud storage.



Group chat bots

Share notifications and other content to group chats, including groups with Customers

What's new:

- Developers can automate updates from other applications to share information in group chats.
- Bots are only one direction; they don't have visibility to other messages in the group chat.
- Message types are text, mark-down text, images, and articles
- Companies can add bots on the backend that whitelisted users can choose to add to chats as needed



天气机器人 BOT

广州今日天气: 29度, 大部分多云, 降雨概率: 60%
@王青 @所有人

Text message from a weather bot



业务反馈机器人 BOT

实时新增用户反馈132例, 请相关同事注意。
类型: 用户反馈
普通用户反馈: 117例
VIP用户反馈: 15例

Mark-down text message from a feedback bot



HR助手 BOT



中秋节礼品领取

今年中秋节公司有豪礼相送

Article from an HR Assistant bot

Our favorite features

Five reasons to start using WeChat Work today

五大特色功能

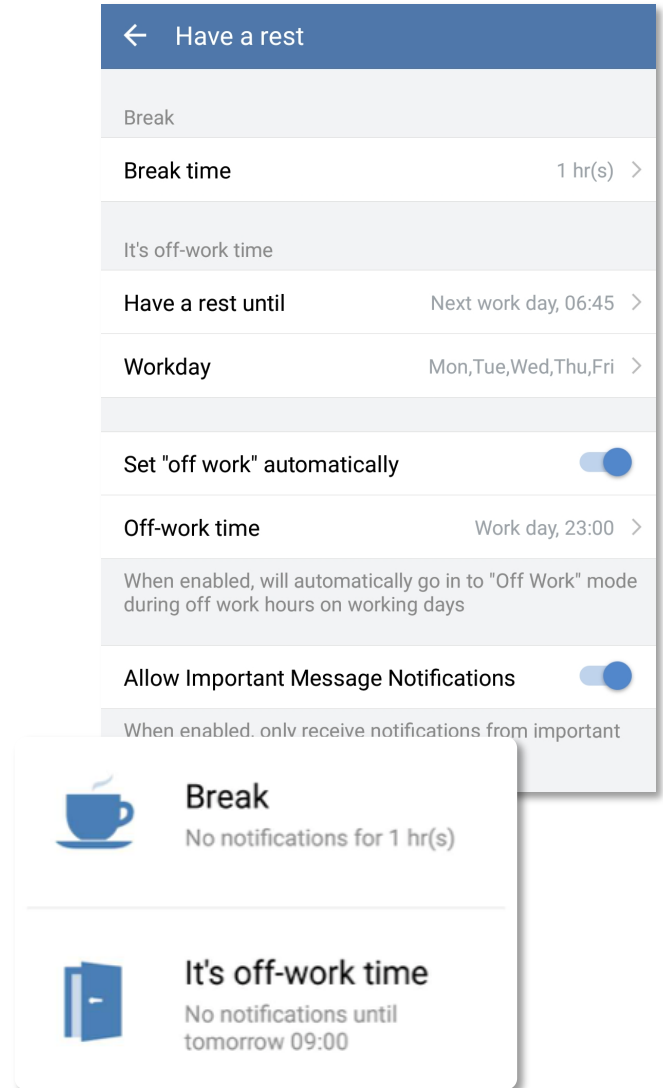


5 Separate work from your personal life

If you're like many companies in China who use WeChat for business messaging, the simple act of moving your work chats to another app can be a big benefit.

It's easier to find colleagues and break out many different topics into threads; easier not to miss important notifications.

Your work and social life have different schedules. This makes it easier to manage your attention and notifications according to your schedule.



4 Six months of file history

One of the biggest pain points of WeChat is that files shared in a group chat expire in a matter of days. With WeChat Work you can set cloud storage to six months.

Company Information
Permission management
Chat management
Contacts management
WeChat Workplace
Apply for joining

Chat management

Cloud Message Storage

180Day(s)

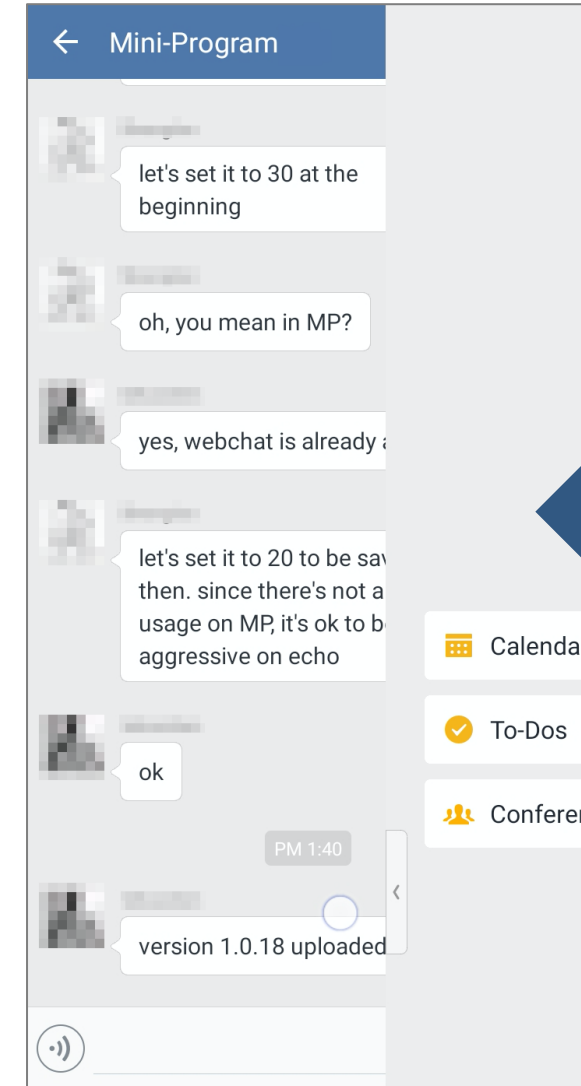
15Day(s)
30Day(s)
90Day(s)
✓ 180Day(s)

Maximum number of group members

3 Shared task manager

This simple feature is a favorite for many teams. It puts tasks right where you need them.

- Long tap any message to create a task from the message
- Add teammates to shared tasks and schedule reminders
- Create a group chat from a shared task



Swipe left from any chat to get quick access to your tasks, calendar, and other tools

2 Org Chart

Add employees to multiple departments and sub-departments; enter their position and add useful tags.

Employees benefit from having a searchable employee directory with real profile photos and separate Chinese/English display names.

Employers can apply the org chart setup to every aspect of WeChat Work: app visibility and distribution, reporting requirements, outbound messaging segmentation, employee contact visibility, etc. This is super useful.

📁 Your Organization

📁 East China

📁 Shanghai

📁 Boutique X

👤 Sales Associates

👤 Back Office

👤 Management

📁 Boutique Y

📁 Boutique Z

📁 Hangzhou

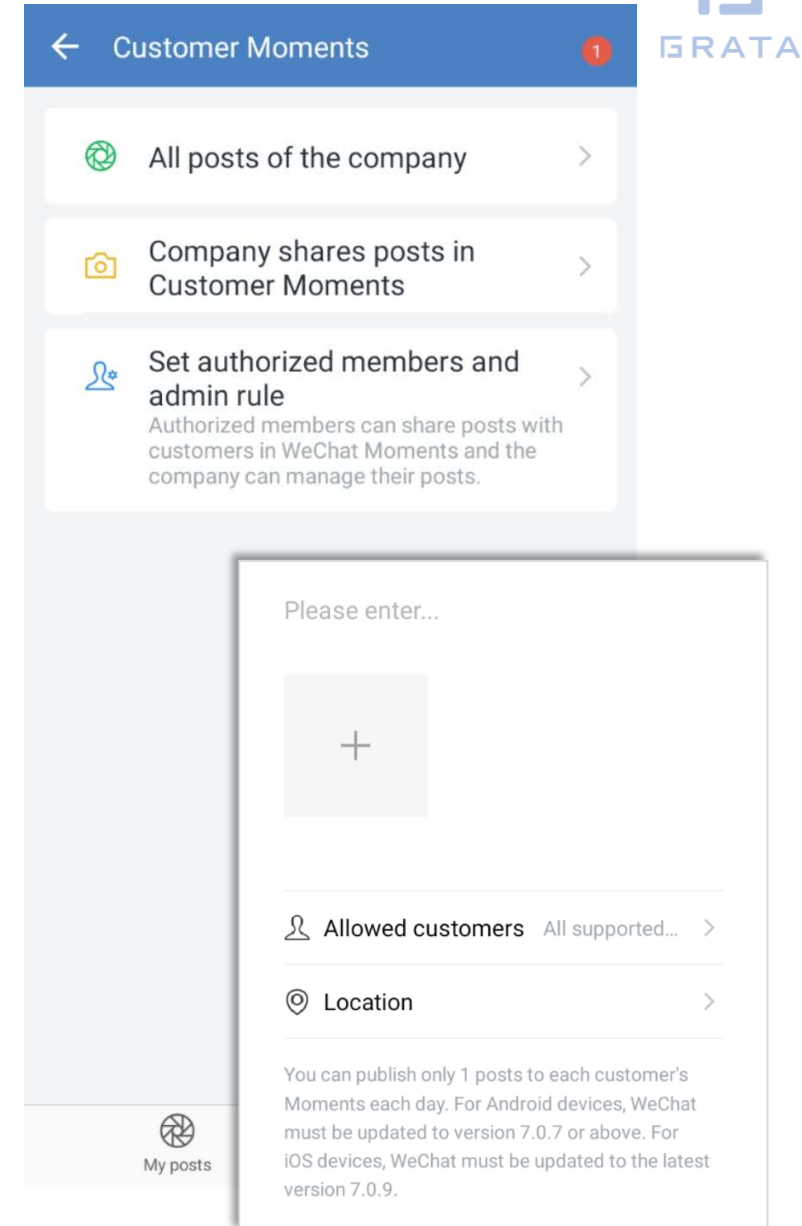


Customers

Interoperability with WeChat is without question WeChat Work's strongest asset.

For years, the #1 issue brands have had with WeChat is that their sales associates need to connect with their VIP customers in WeChat, but the brands have no visibility or ownership over their own customers. When an employee left, they took all their customer contacts with them.

This has been fixed. The latest update – allowing employees to post to their customers' WeChat moments – was the final feature we were waiting on.



Privacy & Security

Five common dangers of using WeChat in the workplace

隐私与安全

5 Poor content controls

Lots of large organizations ended up creating WeChat Official Accounts for internal announcements. There are some techniques you can use to try restricting it to only employees, but this is really a hack at best.

WeChat Work allows you to easily create dozens of your own 'apps' that resemble Official Accounts (broadcast messaging, menus, auto-replies), but crucially allow you to:

- Control which users/departments can see the app
- Easily segment each message recipient list
- Not worry about restrictive broadcast messaging quotas
- Remove sharing options and apply a security watermark on article content





Mistakenly adding the wrong person to chats

How many of your WeChat contacts use their real name and real photo?

How many, for example, "Alex"s do you have in your contacts?

With WeChat Work, the company can use official employee profile photos, official English and Chinese names, and organize colleagues by department to prevent mistakenly adding the wrong person to a sensitive chat.

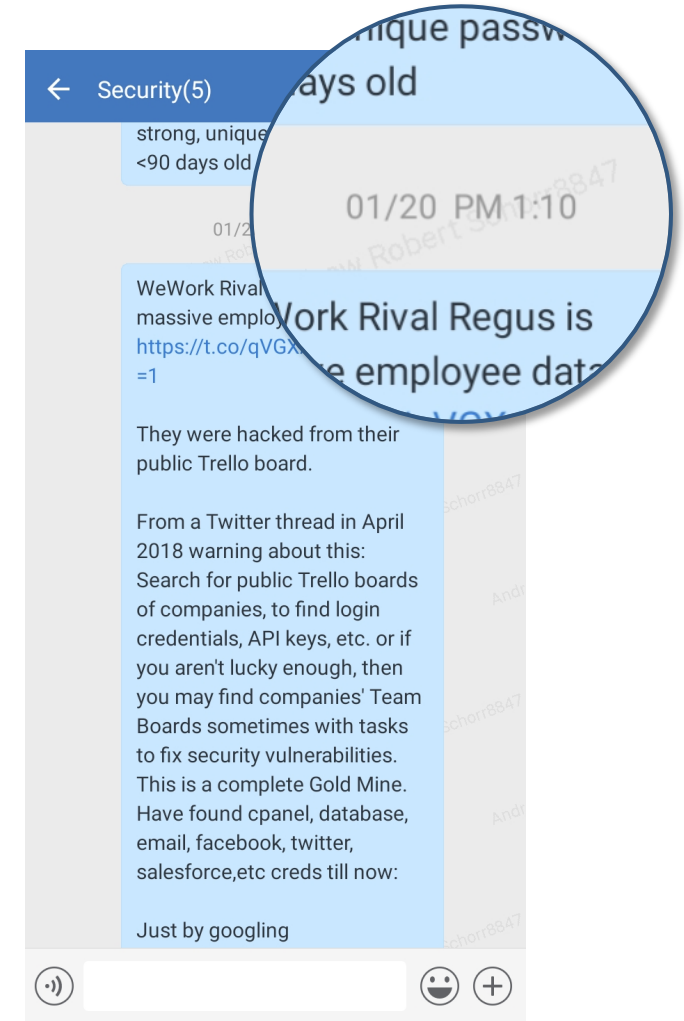


3

Employee data leaks

You don't want sensitive messages from group chats getting shared publicly.

WeChat Work lets you add a layer of extra security by watermarking the employee's username and last four-digits of their phone number across the background of group chats and user profiles.



Apply an optional security to watermark the employee's username in group chats



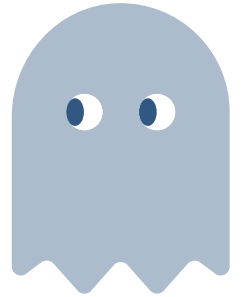
Former colleagues lurking in group chats

It's typical for an employee to belong to several dozen company WeChat group chats.

Each group potentially has a different group chat admin.

Most large companies struggle to remove employees from every group chat when they leave the company. Once removed, the employee still has access to all previous chat history.

With WeChat Work, once you disable someone's user on the backend, they are locked out of the app and all group chats immediately.





Losing your company WeChat contacts

Sales leads and VIP customer contacts belong to your business.

Brands have struggled to retain their contacts as sales teams added their customers to their personal contacts for ease of communication and to post products to their Moments feed. When an employee left a company, those customers were their private contacts.

Now that employees can post to their customers' WeChat Moments feed, there aren't any good excuses remaining to not use WeChat Work.

WCW Security Documentation & Certifications



SOC2 Type 1 and Type 2

Rigorous audit regarding policies and procedures encompassing the security, availability, processing, integrity, and confidentiality of customer data.



National InfoSec Protection – Level 3

国家信息安全等级保护三级认证

Certified to standards of a national “level 3” asset, meaning any disruption could cause serious damage to social order and public interests, or damage to national security



Security White Paper

企业微信白皮书

A paper outlining WeChat Work’s privacy and security policies for data, network and other assets.



ISO/IEC 27018

Code of practice for protection of personally identifiable information (PII) in public clouds acting as PII processors



ISO/IEC 20000

Requirements for an organization to establish, implement, maintain and continually improve a service management system



ISO/IEC 27001

Standards for managing the security of assets such as financial information, intellectual property, employee details or information entrusted to you by third parties.

Getting started

Registering an account and basic setup

如何开始



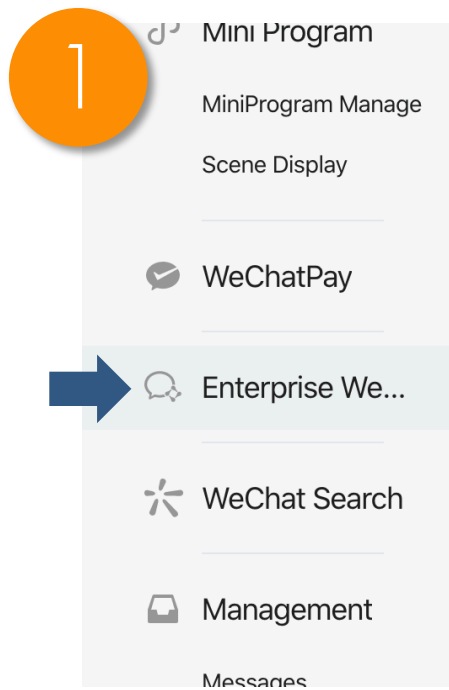
Skip



Home

Register a WeChat Work account

The easiest way to do this is from the backend of a verified WeChat Official Account.

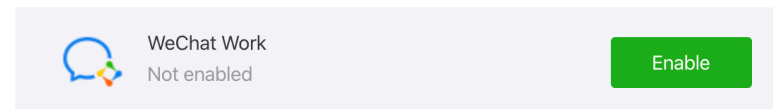


1 Login to your WeChat backend and click on Enterprise WeChat from the side bar menu



2 Click enable on the next page.

You will need your account owner to scan a QR code to confirm.



Requirements to Enable

- Official Accounts by government, media, businesses, or other organizations can enable this feature



If you don't have a WeChat Official Account, you can register manually by clicking on the sign-up button on the WeChat Work homepage:

work.weixin.qq.com

Who can register?

WeChat Work is currently available only for **Mainland China** enterprises, government bodies, and organizations.

Each organization can register a maximum of **five accounts**.

The person registering as the **admin** must have a WeChat account connected to a Mainland China bank account. You can be the admin for up to five accounts.

For large organizations with, for example, mostly independent business units, you can **link multiple accounts** together.

Getting organizational buy-in

Large organizations have internal challenges to consider when implementing a new program like WeChat Work. This presentation is designed, in part, as a resource to help you get to consensus in your organization. Here are some steps we recommend:

1. Register an account and start experimenting with a small team.
2. Identify key stakeholders and project owners.
3. Identify one or two key value propositions for each stakeholder.
4. Identify and mitigate any potential roadblocks or dependencies.
5. Design a pilot implementation. How will you measure success?
6. What does full implementation look like? Who are the key owners for each domain?

Common objections

"It's not secure"

We often hear this even from organizations who know their employees are currently using WeChat for much of their business communication. Upgrading to WeChat Work resolves dozens of very real privacy and security dangers.

Organizations concerned about sensitive files being stored on Tencent servers can implement their own cloud file storage, so employees share links instead of files in WCV. Similarly, if you have a sensitive announcement to share, send a link card that opens to an article hosted on your server.

Use the previous slide on [security documentation](#) to help make your case.

Common objections

"Getting my team to use it will be too difficult"

WeChat Work has several tools and incentives to help make adoption easy at scale, including:

- Batch user import templates
- Automated invites and recurring reminders
- Adoption monitoring
- A red packet incentive system (seeded with up to 10,000RMB)

You should also consider creating your own pull into WCW by providing some content or service exclusively there. Make employees download WCW to, for example, submit leave requests or to claim new customer leads from your website contact form.

Common objections

"My sales team already has all their clients in WeChat"

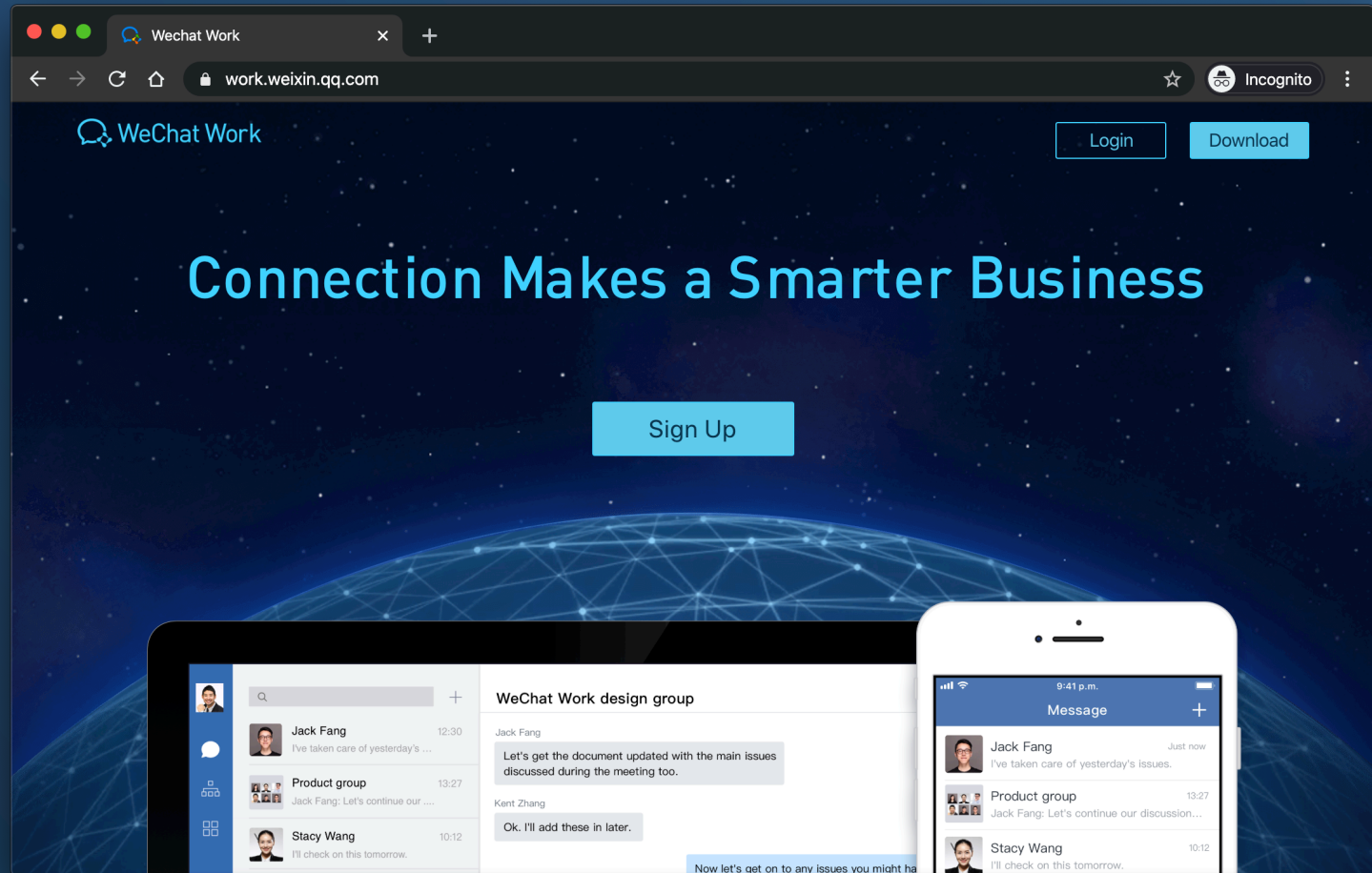
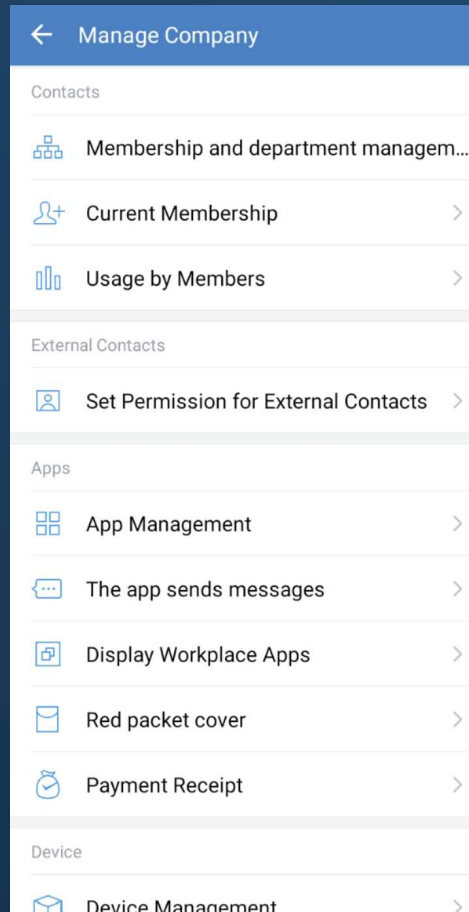
This is likely the biggest hurdle for any retail or e-commerce company. Your sales team will be reluctant to give up full control of their key client contacts. But the longer you wait, the harder it will be to migrate. You need to get control of your organization's CRM.

It's best to frame the conversation as an upgrade to your team's selling capabilities. This will be even more true with a reasonable investment of time, and perhaps some integration work. We cover this in detail later in the Customer section, but here are some areas to consider:

- Help generate content for their Moments posts and company messages
- Setup Quick Replies to make sales conversations more efficient
- Create funnels that send qualified leads into WeChat Work
- Integrate CRM and product data in the chat sidebar
- Create an incentive plan that rewards staff who bring in more customers

WeChat Work backend

Admin users manage account settings from work.weixin.qq.com or from the Manage Company app located in the WeChat Work Workspace



Inviting your team

The first thing you need to do is decide how you will add your team. There are several ways to invite people to join your account.



Share a QR Code

There are separate codes for the WCWV app, and for WeChat Workplace (for users who are unlikely to download the app).

Workplace code: My Company < WeChat Workplace



Invite users from the backend

As you add users on the backend, choose to automatically send email and SMS invitations, or batch upload users and invite them all at once.

Get started at Contacts < Batch import/export



Share an invitation page

Get an invite link with a "Join" button if opened in WeChat or, if opened outside of WeChat, a QR code.

Go to Management Tool < Add members to copy the link



Users invite their colleagues

If enabled, existing members can invite colleagues from WeChat, from their device contacts, or by manually entering their information.

Go to My Company < Apply for joining settings to enable the setting



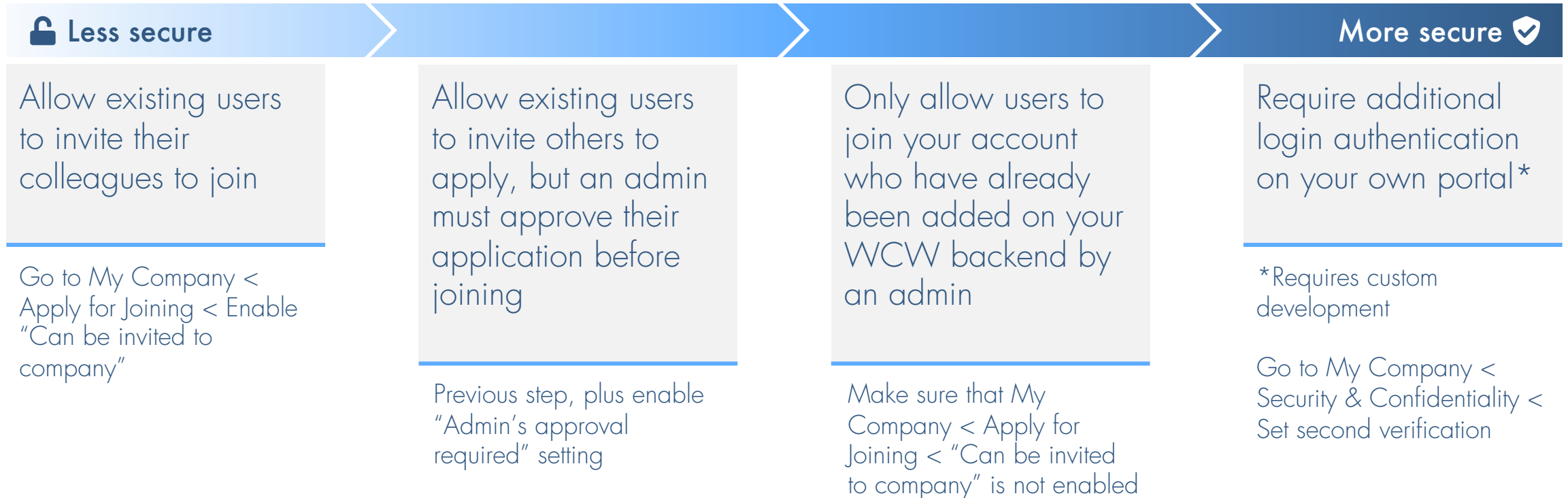
User directory integration

Sync your contacts to or from WeChat Work and another user directory. Supports read-only and read-write modes. Requires custom development.

Go to Management Tool < Sync of Contacts

Joining your account

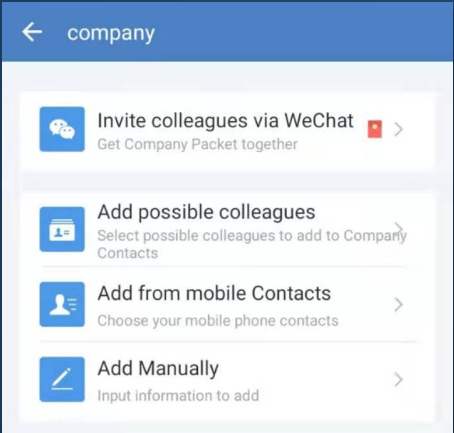
The central premise here is that only verified employees get access to your account. You can calibrate how users join your account to different levels of risk.



Inviting users in WeChat (1 of 2)

1

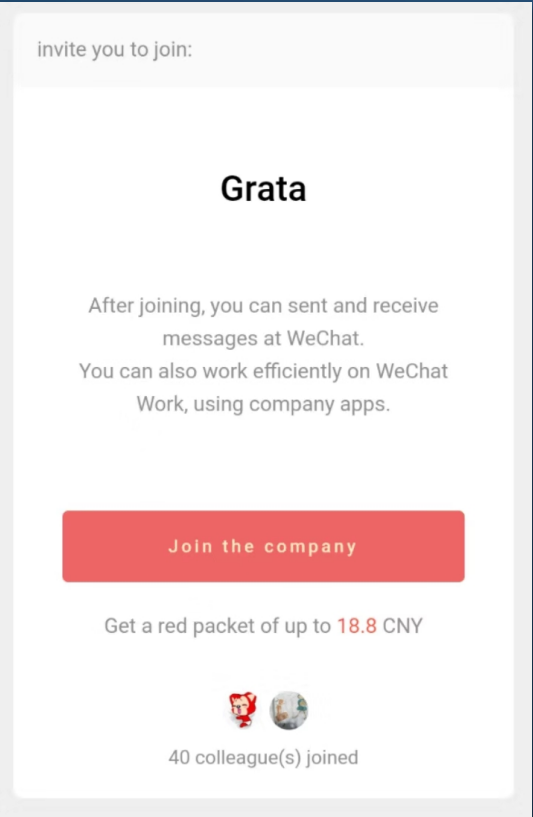
Invite from WCW app



Contacts < Add Member
(at the bottom)

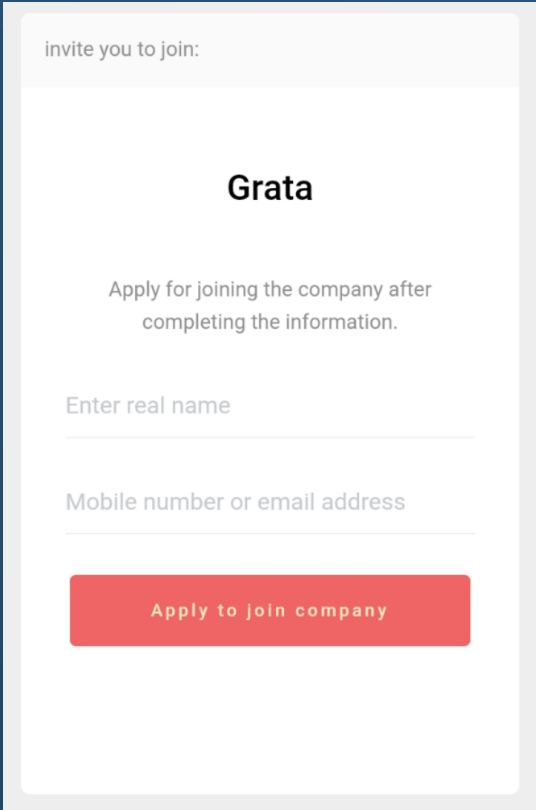
2

Invite viewed in WeChat



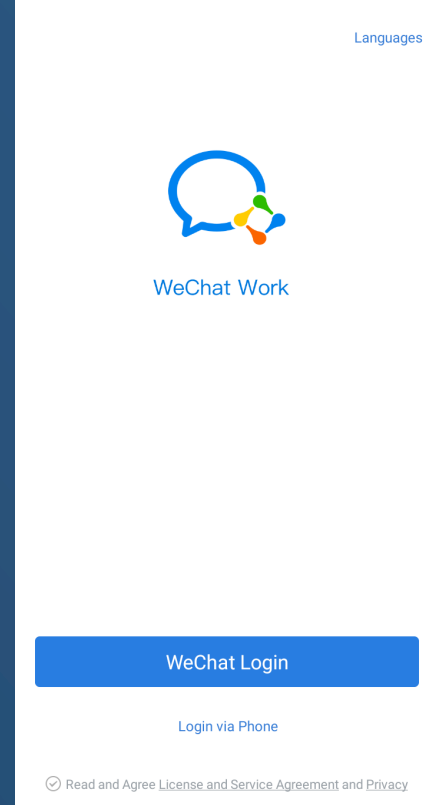
3

Enter name and contact info



4

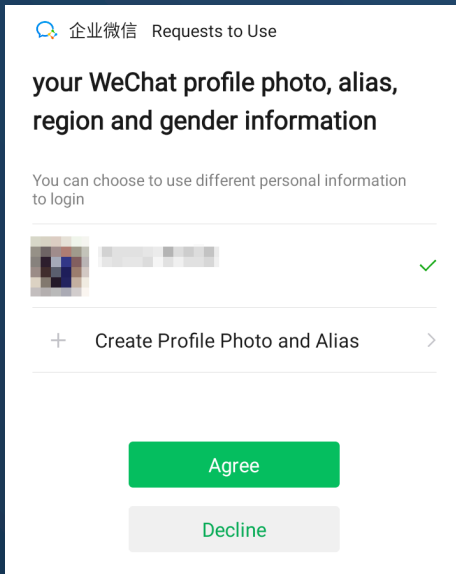
WeChat or SMS login



Inviting users in WeChat (2 of 2)

5



WeChat login



企业微信 Requests to Use

your WeChat profile photo, alias, region and gender information

You can choose to use different personal information to login

  ✓

+ Create Profile Photo and Alias >

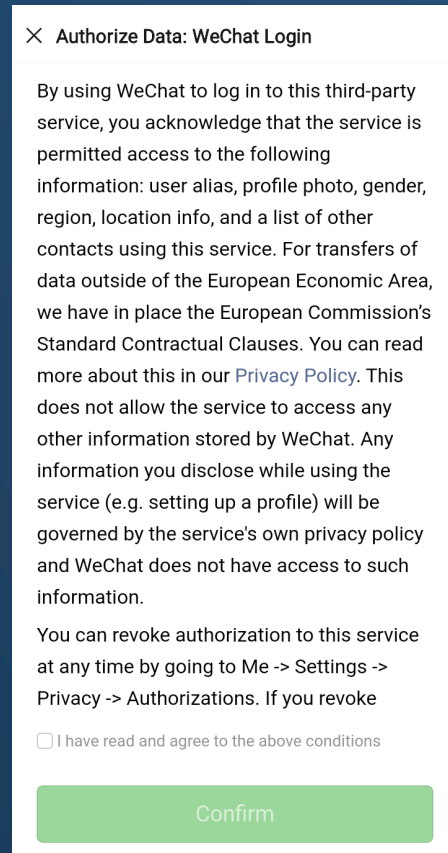
Agree

Decline

Users who prefer not to bind their personal WeChat can use an SMS one-time password instead.

6

WeChat GDPR opt-in



✕ Authorize Data: WeChat Login

By using WeChat to log in to this third-party service, you acknowledge that the service is permitted access to the following information: user alias, profile photo, gender, region, location info, and a list of other contacts using this service. For transfers of data outside of the European Economic Area, we have in place the European Commission's Standard Contractual Clauses. You can read more about this in our [Privacy Policy](#). This does not allow the service to access any other information stored by WeChat. Any information you disclose while using the service (e.g. setting up a profile) will be governed by the service's own privacy policy and WeChat does not have access to such information.

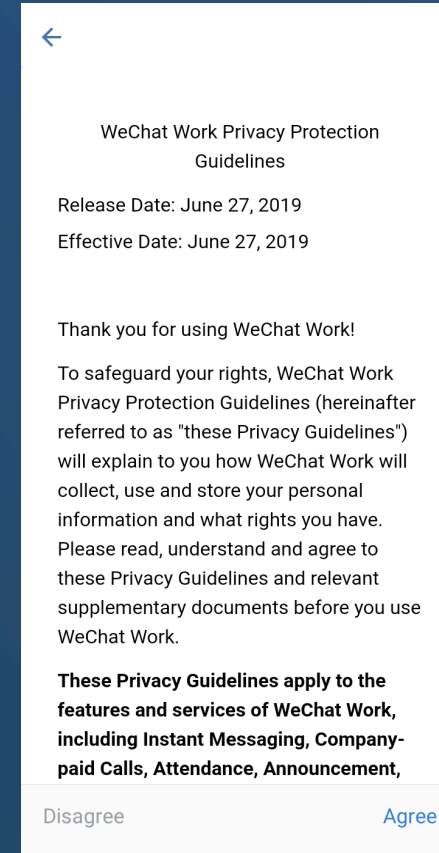
You can revoke authorization to this service at any time by going to Me -> Settings -> Privacy -> Authorizations. If you revoke

☐ I have read and agree to the above conditions

Confirm

7

WeChat Work Privacy



←

WeChat Work Privacy Protection Guidelines

Release Date: June 27, 2019

Effective Date: June 27, 2019

Thank you for using WeChat Work!

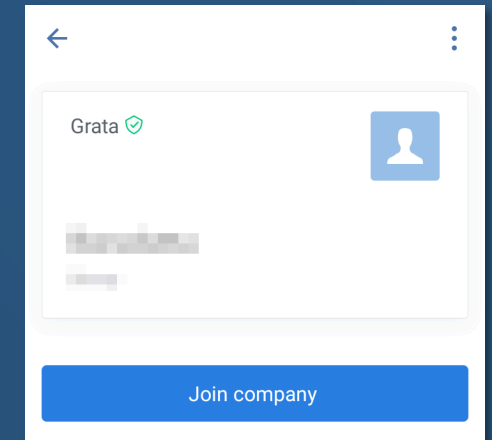
To safeguard your rights, WeChat Work Privacy Protection Guidelines (hereinafter referred to as "these Privacy Guidelines") will explain to you how WeChat Work will collect, use and store your personal information and what rights you have. Please read, understand and agree to these Privacy Guidelines and relevant supplementary documents before you use WeChat Work.

These Privacy Guidelines apply to the features and services of WeChat Work, including Instant Messaging, Company-paid Calls, Attendance, Announcement,


Disagree Agree

8

Confirm company



←

Grata ✓ 

Join company

Member profiles

Required information

- Name
- Any unique Account ID
- Gender
- Either of
 - mobile phone or
 - email address + WeChat account binding

[WeChat Work Privacy Policy](#)

Custom fields

You can add up to twenty custom fields on internal employee profiles and up to six custom fields on external employee profiles.

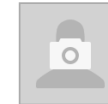
Go to My Company < Contacts Management to configure custom fields.

Add members

Save and continue to add

Save

Cancel



Name

Alias

* Account ⓘ: A member's unique identifier cannot be changed once determined.

Gender: ☒ Male ☐ Female

Mobile phone: + 86 ▼ Members can verify the mobile number to join the company.

Office Number:

Email:

Address:

座机:

英文名:

Member profiles

Department: Members can belong to multiple departments. Set a main (主) department for members, this will display first on their employee profile. Departments can have separate Chinese and English names.

Tags make it easy to select inter-departmental users when sending a broadcast message, setting app visibility, etc. Use [this template](#) to batch import tags to be applied to members or entire departments.

Identity is used in a few places in WVCW, such as assigning group chat admin in department chats, and in the approval app, where “superior” users can approve requests from “normal members” in their department.

* Department: Grata-6 主 Modify

Tag: Modify

Title:

Identity: ☒ Normal members ☐ Superior

External Info

Company's short name: Grata

Title: ☒ Show internal title for all members ☐ Custom

Website: Webpage Settings

☒ Send invitations via SMS/email

Save and continue to add

Save

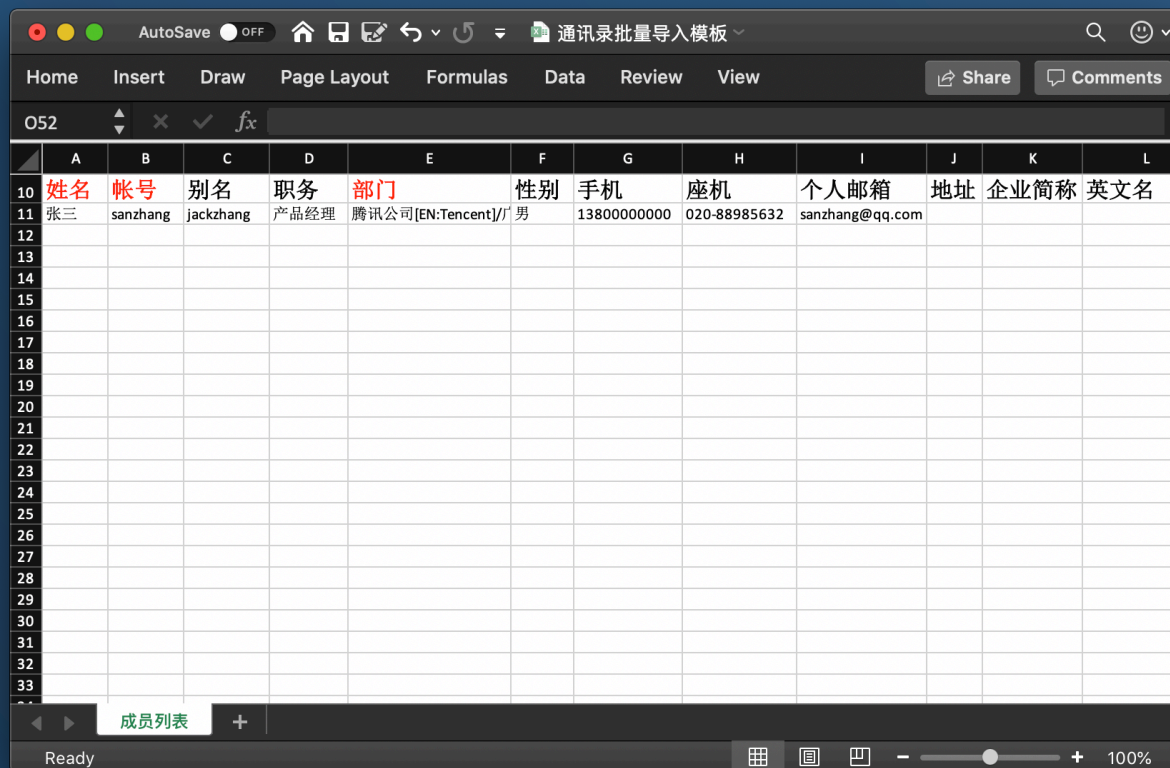
Cancel

Batch user upload

Download the Excel template [here](#).

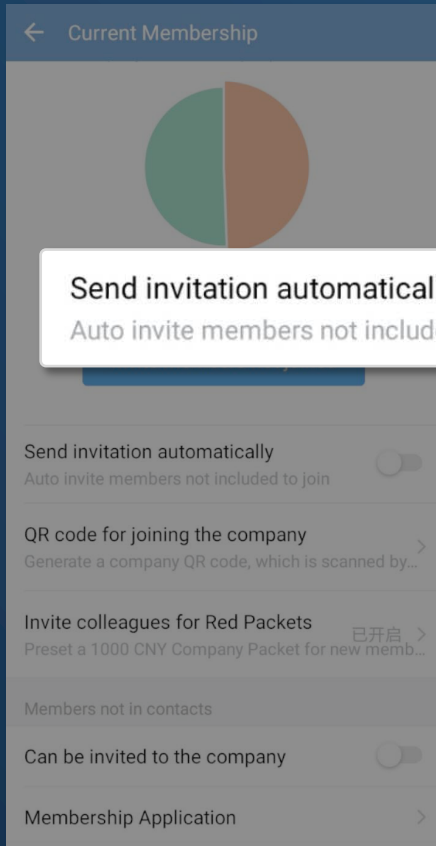
Note:

- Do not edit the column names
- Column names in red are required
 - Either mobile phone - or - email address is required
- **User ID:** The user ID must be unique. It can contain 1-32 characters including period, dash, and underscore.
- **Departments:** Use a slash to specify sub-departments. If you want to include English department names, use [EN:]. For example: "腾讯公司[EN:Tencent]/广州研发部[EN:RDGZ]". For employees that belong to multiple departments, separate them with a semi-colon.
- **Phone number:** +86 phone numbers do not need the country code. Other numbers should use the "+" sign before country code and number



	A	B	C	D	E	F	G	H	I	J	K	L
10	姓名	帐号	别名	职务	部门	性别	手机	座机	个人邮箱	地址	企业简称	英文名
11	张三	sanzhang	jackzhang	产品经理	腾讯公司[EN:Tencent]/广州研发部[EN:RDGZ]	男	13800000000	020-88985632	sanzhang@qq.com			
12												
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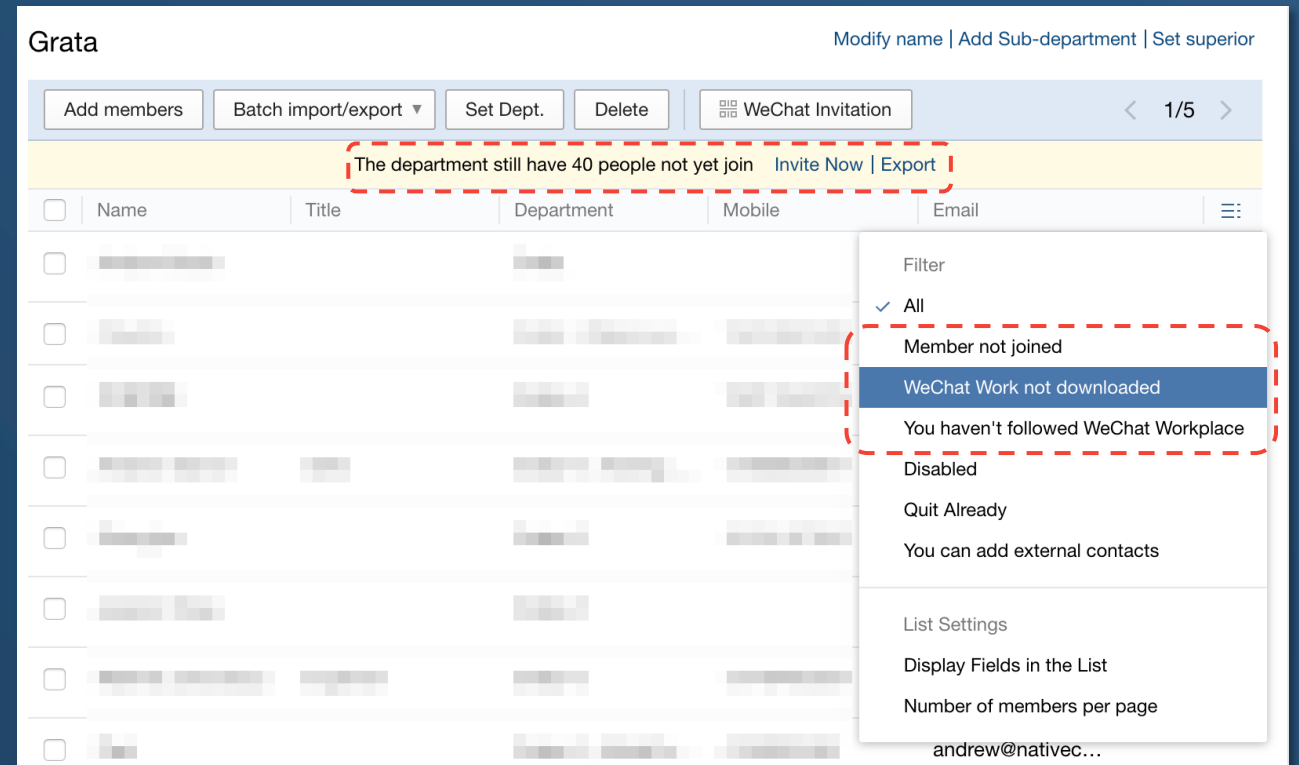
Tools for managing adoption



Automate weekly reminders to employees who have been added to your account backend but not yet joined your account.

Go to Workspace < Manage Company < Current Membership

Filter your contacts page to see who hasn't joined your account and who hasn't downloaded the app yet. Easily resend batch invites to users.





Super admin and sub-admin users

Setup sub-admin users with limited permissions to help manage large departments or multiple locations

Sub-admin

Sub-admin can have a scope for the entire account or just a single department. Set whether they have read-only or read/write access to users, apps, and devices in their scope.

Admin groups

To save time, save configurations of permissions that can be applied to multiple sub-admin users.

Super admin

You can also add additional super admin users, who have all permissions for your account.

Service providers

You can give registered WCW service providers a QR code from your backend with permissions limited to just the scope of their service.

Go to My Company < Permission management



Contact visibility and privacy

WeChat Work has a simple yet extensible rules editor to apply custom privacy settings across your entire organization

Restrict visibility

Set users and departments who should be restricted to view only colleagues in their own department and any additional contacts you may select. Add exceptions for people in the departments for whom the rule does not apply. You can also restrict some employees from having any visibility to contacts.

Hide users

Set users and departments who should not be visible to other employees in your company directory. Add exceptions for any members who should be able to see the hidden users.

Hide sensitive data

Control which profile information is visible to other employees and, separately, what is visible to external partners and customers. You can also designate some sensitive members for whom only limited profile data is visible to other users, unless the user is on a whitelist.

Go to My Company < Contacts management



Example contact visibility configuration

These users

- 📁 X Boutique
- 📁 Y Boutique
- 📁 Z Boutique

With the exception of

- 🏷️ Management

Can only see colleagues in their own department and:

- 📁 HR
- 📁 IT Help Desk
- 🏷️ Trainer

These users cannot view any company contacts:

- 🏷️ Temp



Group chat management

WeChat Work has a simple yet extensible rules editor to apply custom privacy settings across your entire organization

Department group chat

If you enable this setting, a group chat will automatically be created for every bottom-level department (meaning those with no sub-departments) with three or more members. As you add and remove people to the department on the backend, the department group chat is automatically updated.

All Member Group

Similar to the department group chat, but for all members. Note that the maximum (internal) group chat size is 2,000 users.

All group chats allow you to mute all members, and whitelist exceptions, or add select members to be muted.

Creating group chats

Set the maximum group size (from five to 2,000) that can be created by non-whitelisted members. For example, allow any user to create a group chat of up to ten people, beyond that only select users have the permission to do so.

Go to My Company < Chat management

WeChat Work Customers

Solving WeChat's biggest pain points for brands

企业微信客户

The **status quo** for most companies in China is that employees connect to customers using their **personal WeChat**.



Not only do companies have no visibility into contacts, when an employee leaves the company to work for a competitor, they take all their key client contacts with them.

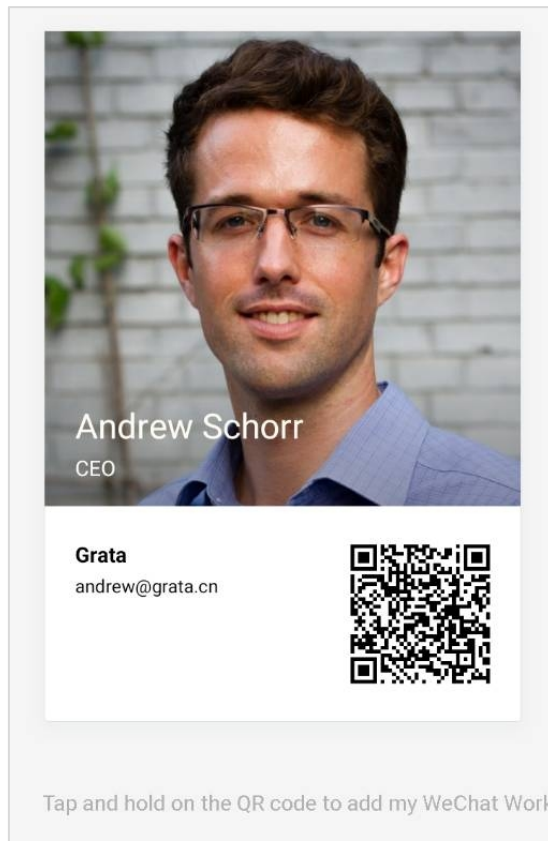
The Customers feature allows employees to add their customers' WeChat accounts to their WeChat Work external contacts.



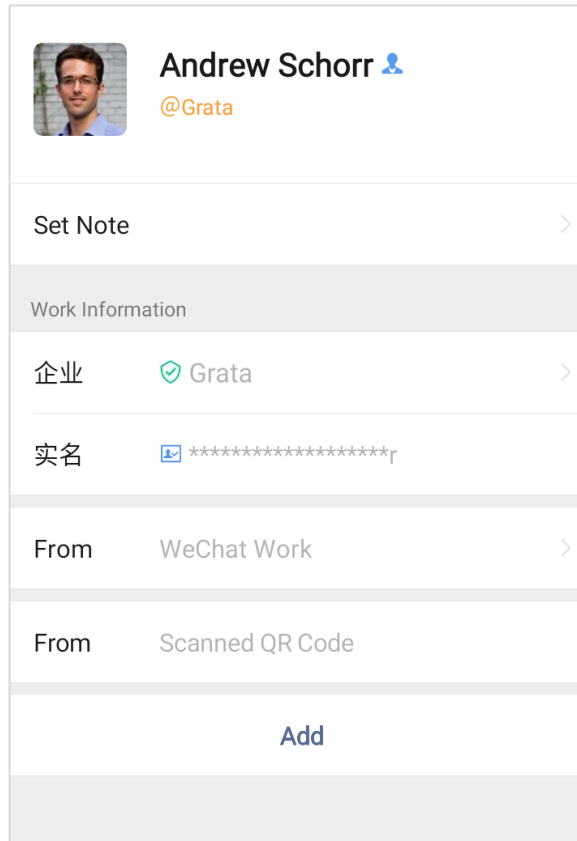
This allows companies to include WeChat customers in their **CRM** database. If an employee leaves the company, the company can **migrate contacts** and group chat ownership to other employees.

Customer's view in WeChat (1 of 2)

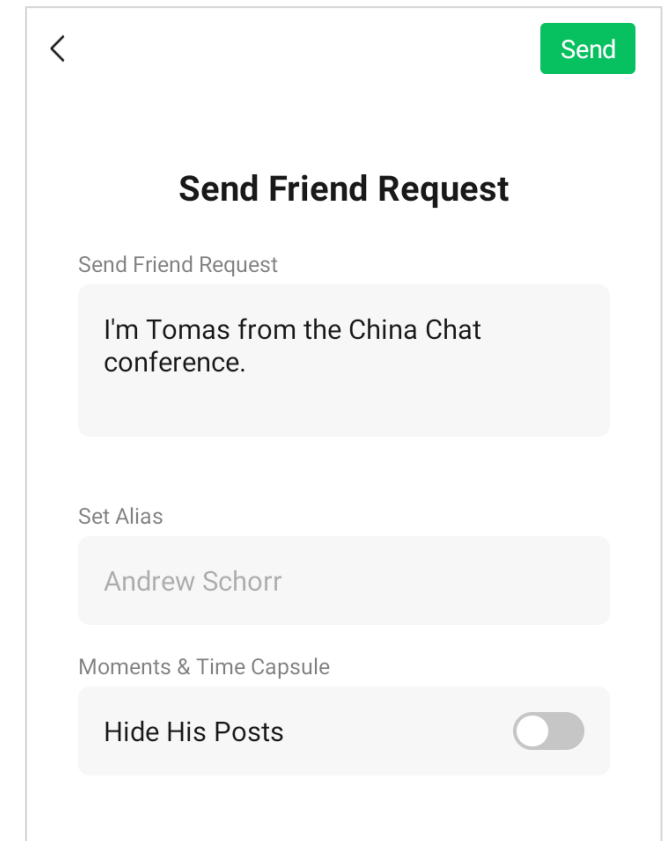
1 WCW business card shared to WeChat



2 Tap QR code to view external profile

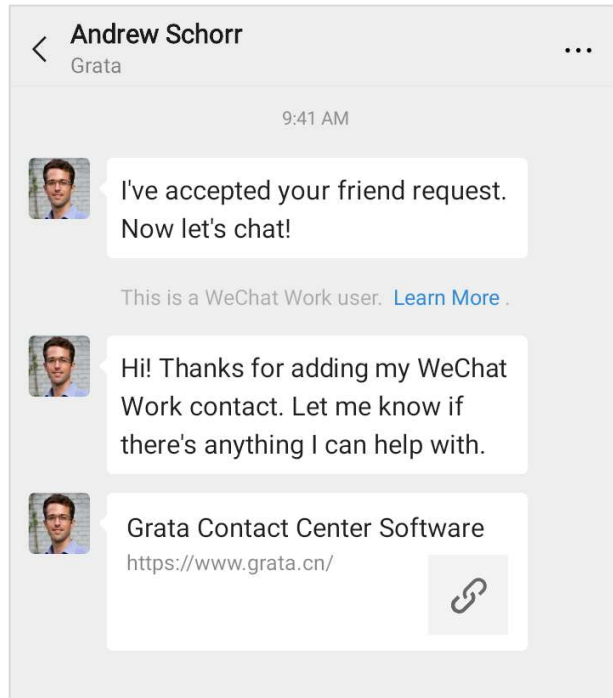


3 Customer sends friend request to employee

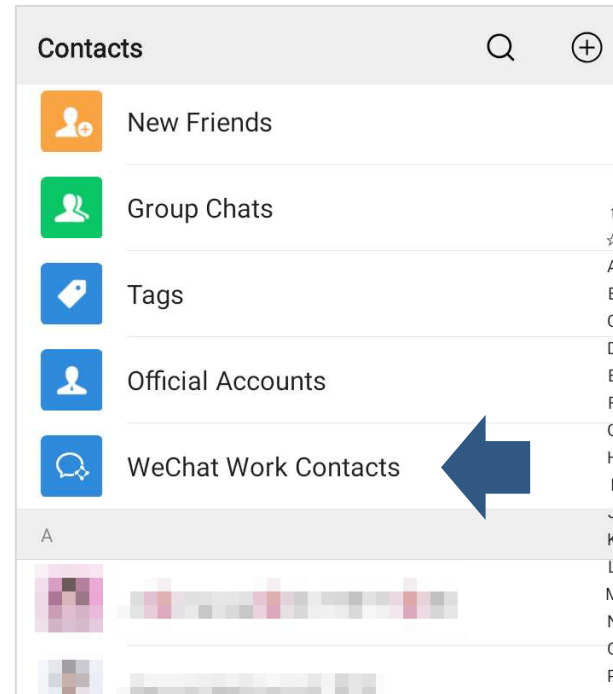


Customer's view in WeChat (2 of 2)

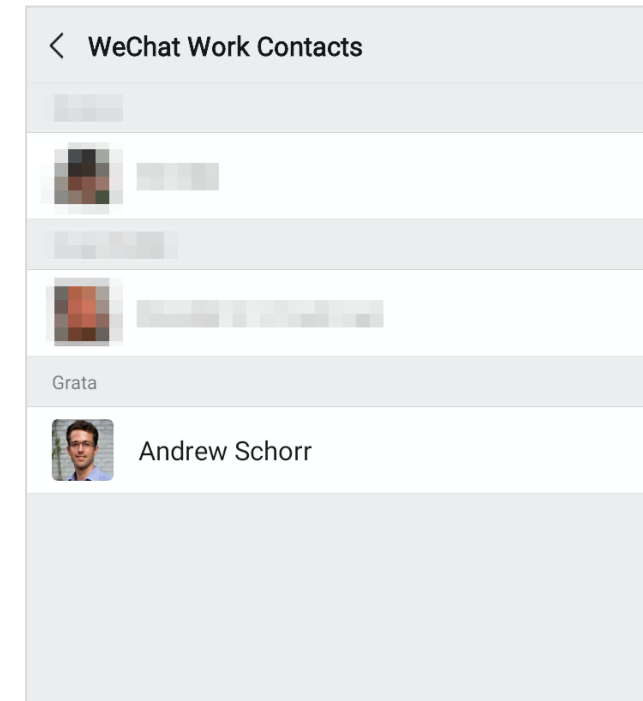
4 Receive auto-greeting on request acceptance



5 WeChat Work folder in Contacts



6 Contacts grouped by company



Customer features



Group Chats

Now up to 200 members: welcome greetings, quick replies, chat bots, and more



Quick Replies

Rely on prepared text answers to FAQ while chatting with customers



Broadcast Messages

Select any segmentation of Customers for personalized messaging at scale



WeChat Moments

Your sales team can now keep their favorite feature from WeChat: selling in Moments



External Profiles

Verified profiles help Customers trust they're speaking with a genuine employee



Contact Me

Individual and group QR codes and Mini-Program buttons to connect customers to employees



CRM Interface

Display custom CRM profile pages, managed tags, and contact export



App integrations

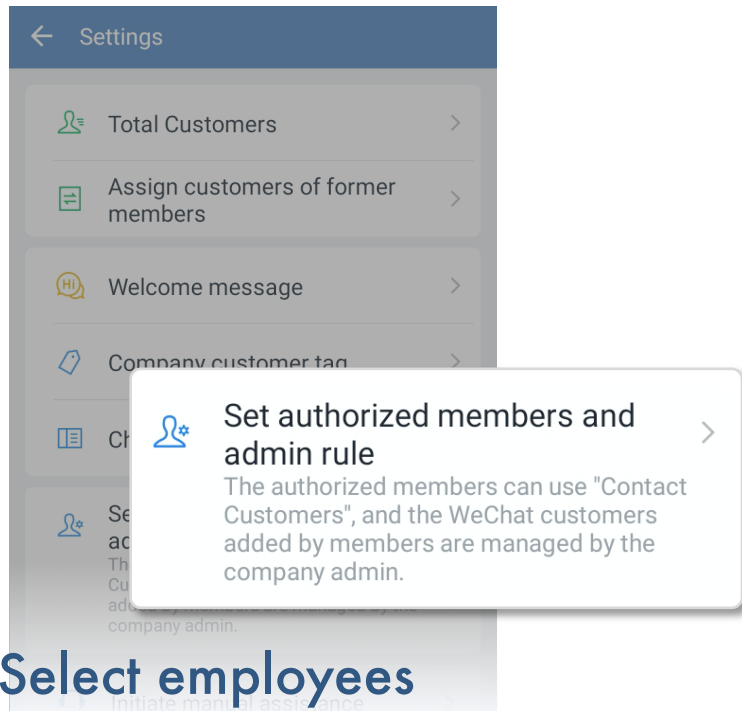
Build views of your own data into Customer chats: order history, product list, etc.

Getting Started

- ① Enable Customers feature for designated employees
- ② Ensure participating employees complete real-name verification
- ③ Review your external content and settings
- ④ Set strategies for growing Customers

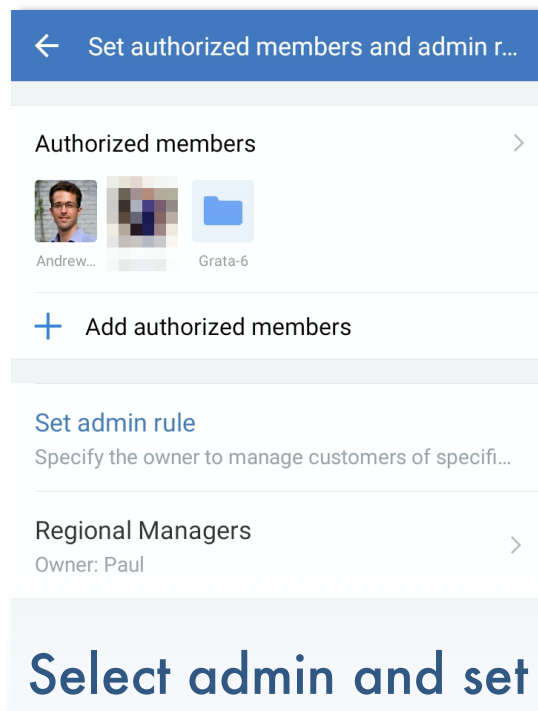
Enable Customers feature

Verified WeChat Work accounts can designate employees who can add WeChat users as external contacts.



Set authorized members and admin rule

The authorized members can use "Contact Customers", and the WeChat customers added by members are managed by the company admin.



Set authorized members and admin rule

Authorized members

Andrew... Grata-6

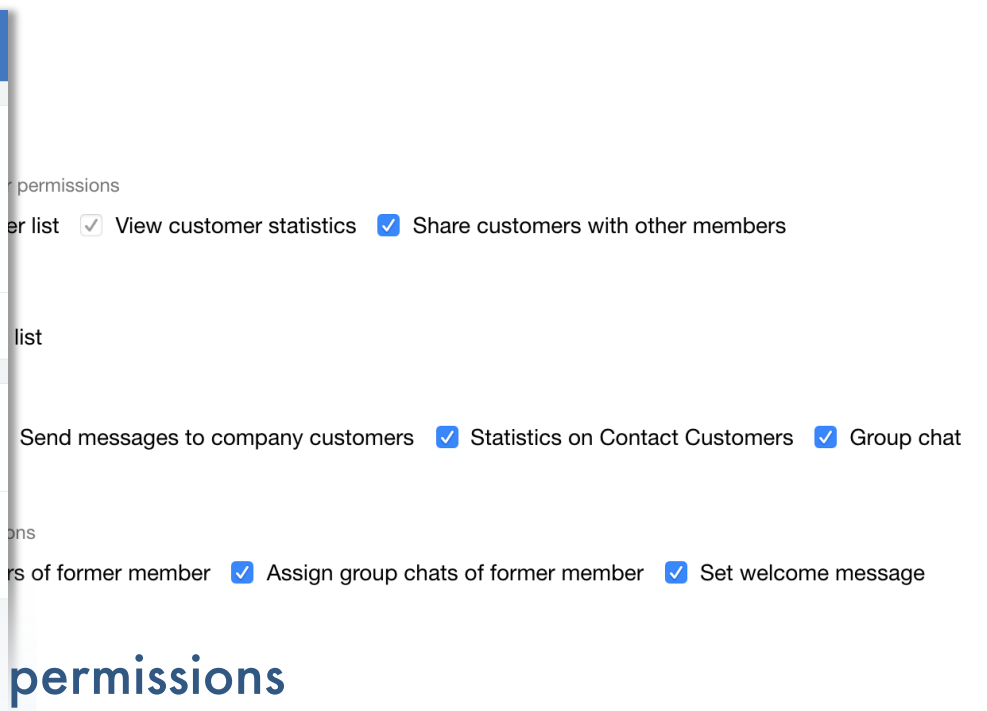
+ Add authorized members

Set admin rule

Specify the owner to manage customers of specific...

Regional Managers

Owner: Paul



permissions

er list ☒ View customer statistics ☒ Share customers with other members

list

Send messages to company customers ☒ Statistics on Contact Customers ☒ Group chat

ons

ers of former member ☒ Assign group chats of former member ☒ Set welcome message

Select employees

Designate departments and members for Customers

Select admin and set permissions

Set custom permissions for department-level admin who can manage customer contacts for their team

Go to Customers < Settings < "Set authorized members and admin rule"

Real name verification

Chinese employees can verify their identity instantly entering their national ID number (身份证) and confirming by facial recognition. Employees without a Chinese ID will need to upload their passport and one form of supporting evidence. The review process usually takes a few hours.

[< Back](#)
Identity Verification

Submit your ID No. for face authentication to verify your identity

Name

ID No.

Identity verification for Hong Kong China, Macao China, Taiwan China and overseas users

Start face authentication

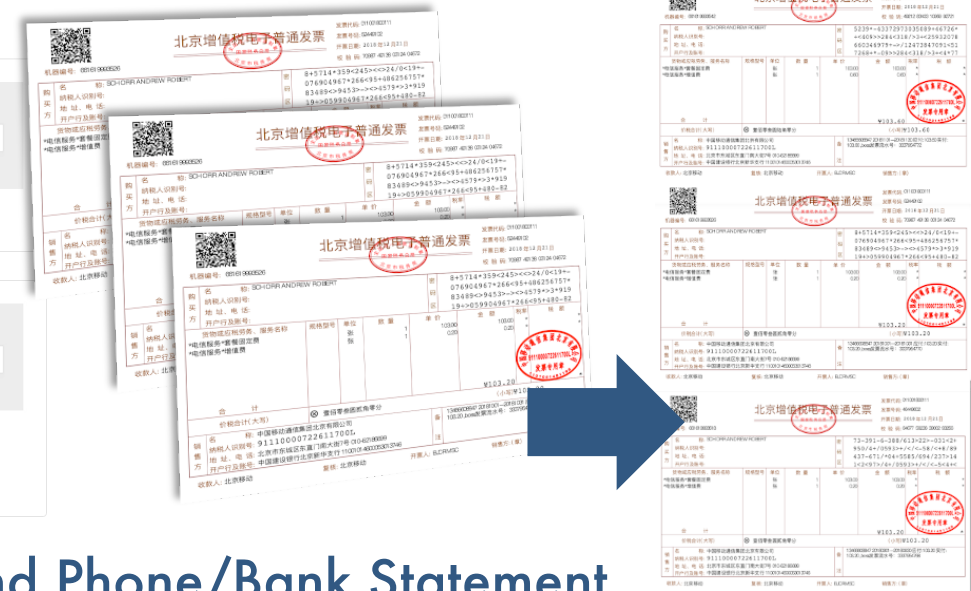
Upload documents

ID Certificates

Valid identity certificates include Hong Kong/Macao/Taiwan or overseas identity card, passport, or driver's license

Mobile Phone//Credit Card Statement

Select either mobile phone statement or credit card statement. The statement should contain the user name and the bill payment record for the last three months (for bank statement, transfer record for the last three months).



Non-Mainland China users

Tap the instructions for non-Mainland China users and then enter your full name as it appears on your passport.

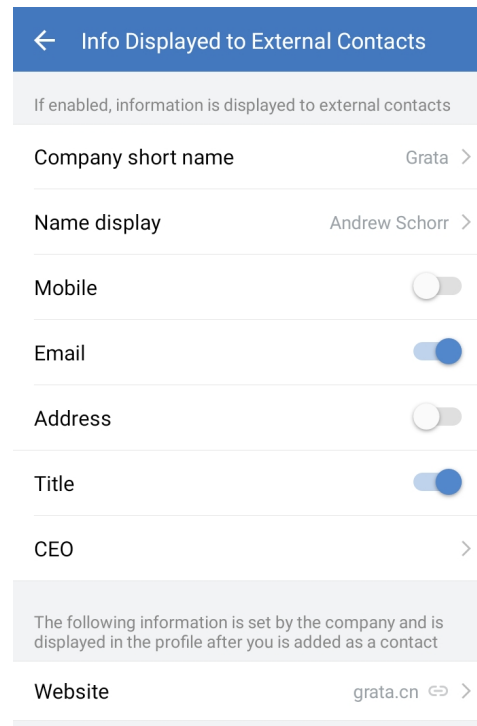
Upload Passport and Phone/Bank Statement

If you have a China Mobile or Unicom number, you should be able to download recent fapiao from their app. You will need to combine three monthly fapiao into a single image to upload them here.

External Content Management (1 of 2)

External Profiles

Set which employee profile data are visible to Customers. Add custom fields with text, URLs, and Mini-Program page paths.



← Info Displayed to External Contacts

If enabled, information is displayed to external contacts

Company short name	Grata >
Name display	Andrew Schorr >
Mobile	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>
Address	<input type="checkbox"/>
Title	<input checked="" type="checkbox"/>
CEO	>

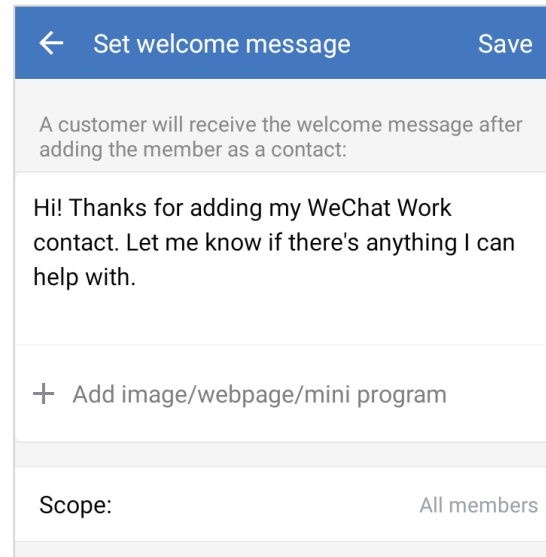
The following information is set by the company and is displayed in the profile after you is added as a contact

Website	grata.cn <>
---------	-------------

Go to My Company < Contacts Management < External Information Display

Welcome message

Send a welcome message to customers whenever they connect with an employee. Send a text message plus an image, webpage, or mini-program.



← Set welcome message Save

A customer will receive the welcome message after adding the member as a contact:

Hi! Thanks for adding my WeChat Work contact. Let me know if there's anything I can help with.

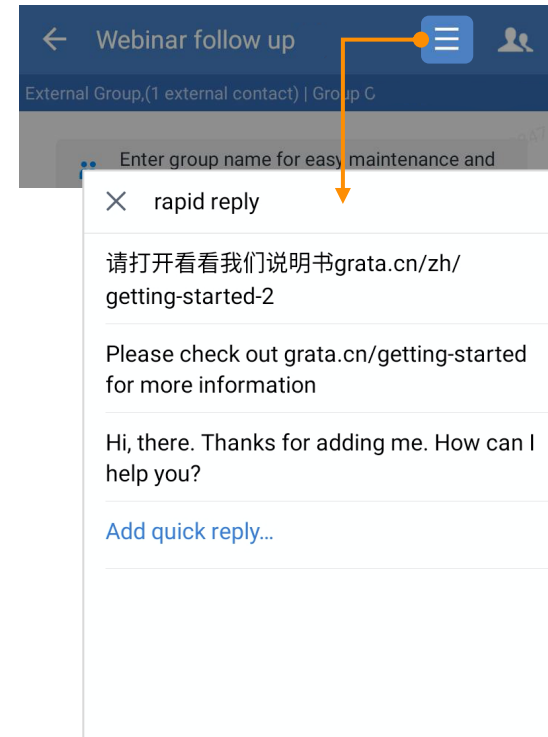
+ Add image/webpage/mini program

Scope: All members

Go to Customer Contacts < Settings < Welcome Message

Quick Replies

The company and each employee can save replies for use in Customer chats, in both mobile and desktop apps



← Webinar follow up

External Group, (1 external contact) | Group G

Enter group name for easy maintenance and

× rapid reply

请打开看看我们说明书grata.cn/zh/getting-started-2

Please check out grata.cn/getting-started for more information

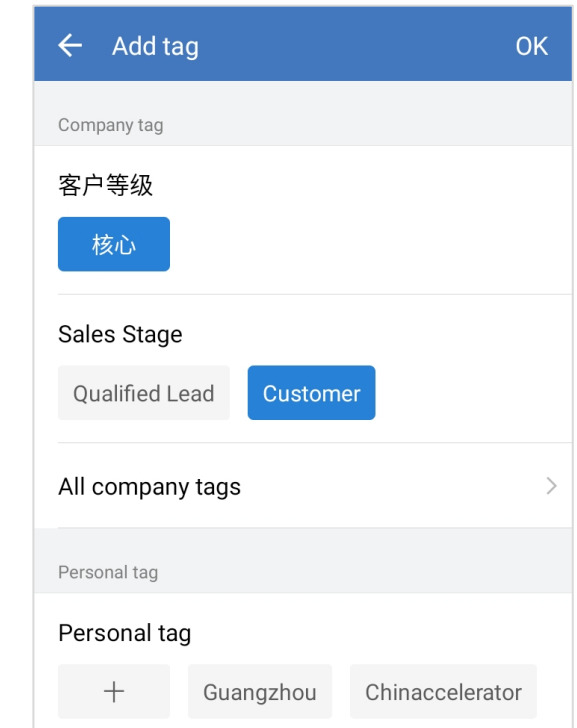
Hi, there. Thanks for adding me. How can I help you?

Add quick reply...

Go to Customer Contacts < Settings < Quick Reply

Tags

The company can set tags and tag groups while employees can also add personal tags. Profile data and tags can be exported.



← Add tag OK

Company tag

客户等级

核心

Sales Stage

Qualified Lead Customer

All company tags >

Personal tag

Personal tag

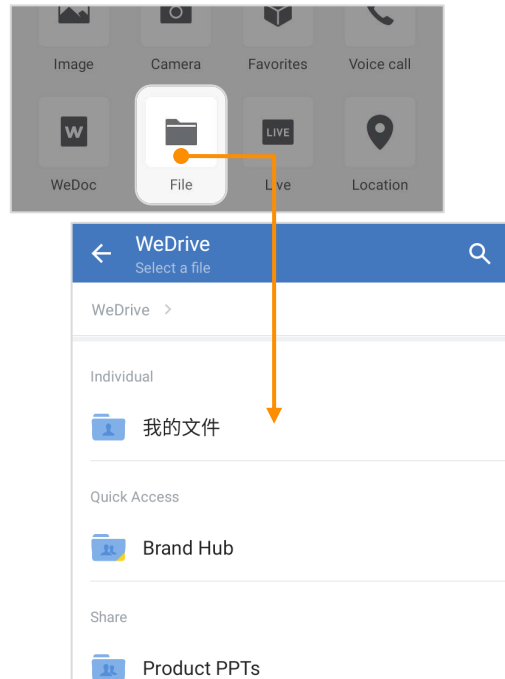
+ Guangzhou Chinaccelerator

Go to Customer Contacts < Settings < Company Customer Tag

External Content Management (2 of 2)

File assets

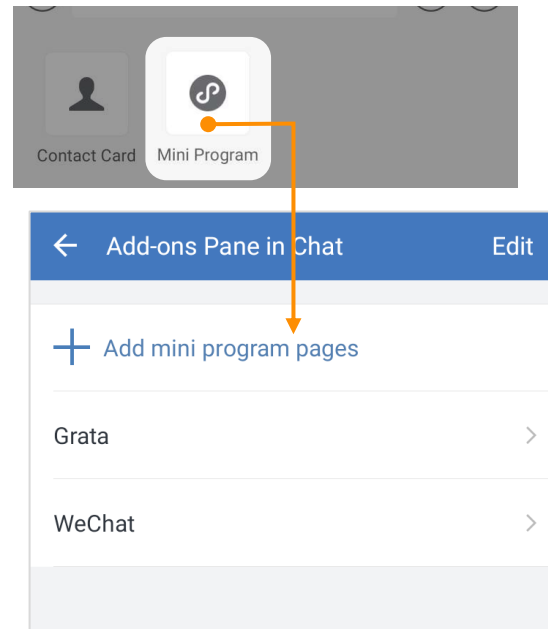
Make sales assets available in WeDrive so employees have easy access to share materials with Customers



Go to WCW App< Workspace< Manage Company< App Management< Mini-Programs

Mini-Program pages

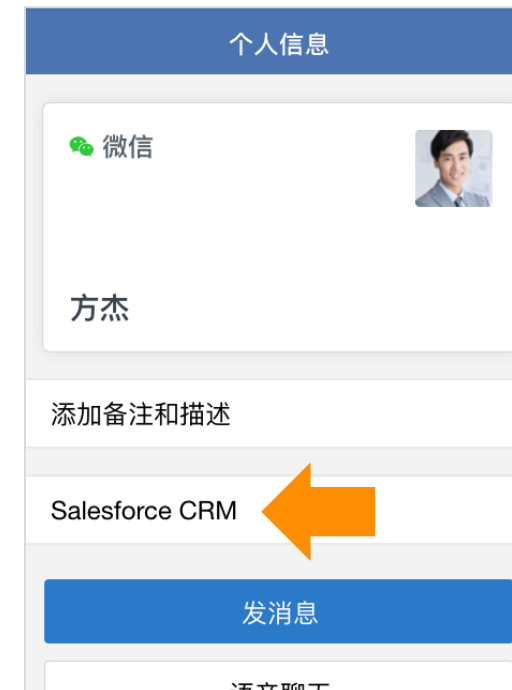
After binding a MP to WCW, your employees can share it in any external chat. Admin users can bookmark multiple MP pages, called "Add-on Panes" (聊天附件栏).



Go to WCW App< Workspace< Manage Company< App Management< Mini-Programs

Customer Profiles

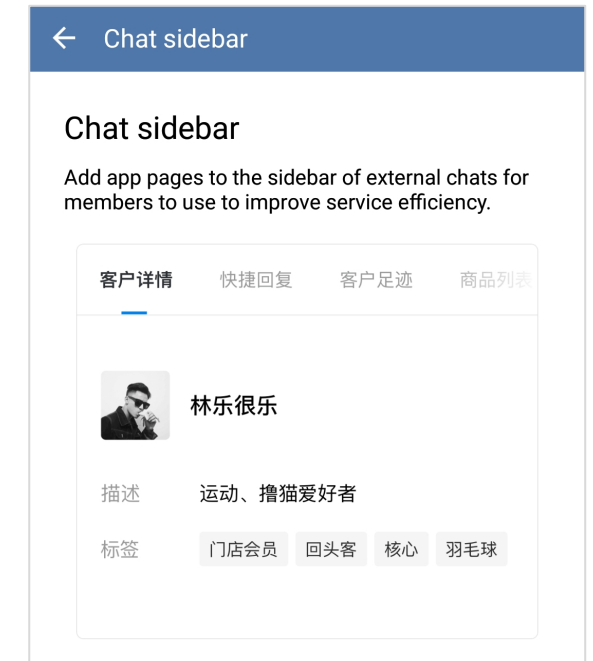
Display CRM data from your own database on Customer profiles.
*Requires development work.



Go to My Company< External Communication Management< Custom Details Page

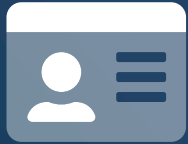
Chat sidebar

Add app pages that can send customers text, images, videos, files, and articles from your own server.
*Requires development work.



Go to Customer Contacts< Settings< Chat Sidebar Management

Customer entry point strategies



WCW Business Card

Share to WeChat, download as an image, or copy the email signature code snippet



Contact Me

Connect customers to a specific employee or teams by QR code, MP button, menu button, or H5



Group Chat

WeChat users can join group chats by scanning a QR code or from a mini-program button



Business card scanner

Contact information is updated to their user profile and the image is saved to their profile



Shared contacts

Customers and colleagues can share contacts, the company can migrate contacts



Add WeChat contacts

Employees can send invitations to connect to their personal WeChat contacts



Scan their QR code

Scan a customer's WeChat QR code from the WCW app to connect



Phone number search

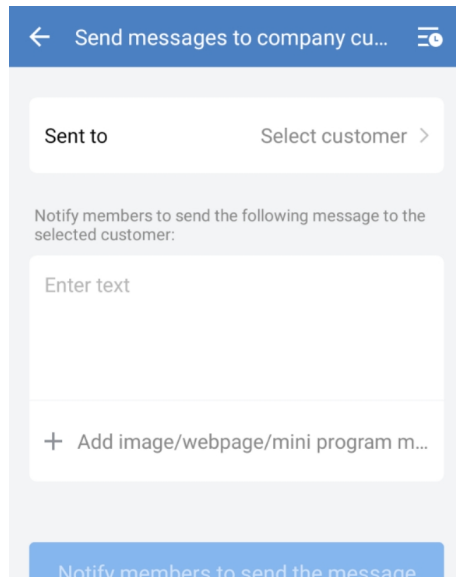
Find WeChat Customers by searching their mobile phone number in WCW

Marketing to WCW Customers

Broadcast Messages

Employees can broadcast a text message plus image to multiple customer segmentations once per day per customer.

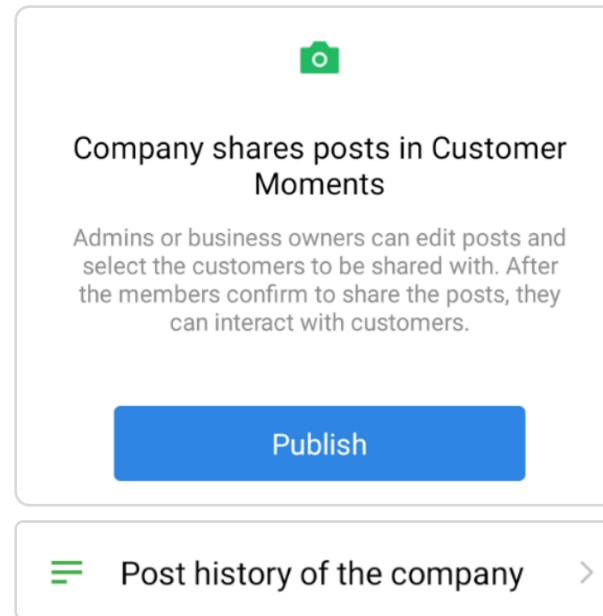
The company can suggest broadcast messages with text plus image, link, or MP page, by segmentation, to employees, who can choose to forward the message, once per week per customer.



Moments

Employees can post text plus an image or link to customer segmentations, once per day per customer.

The company can suggest posts with text plus image or link by segmentation to employees, who can choose to post the message, four times per month per customer.



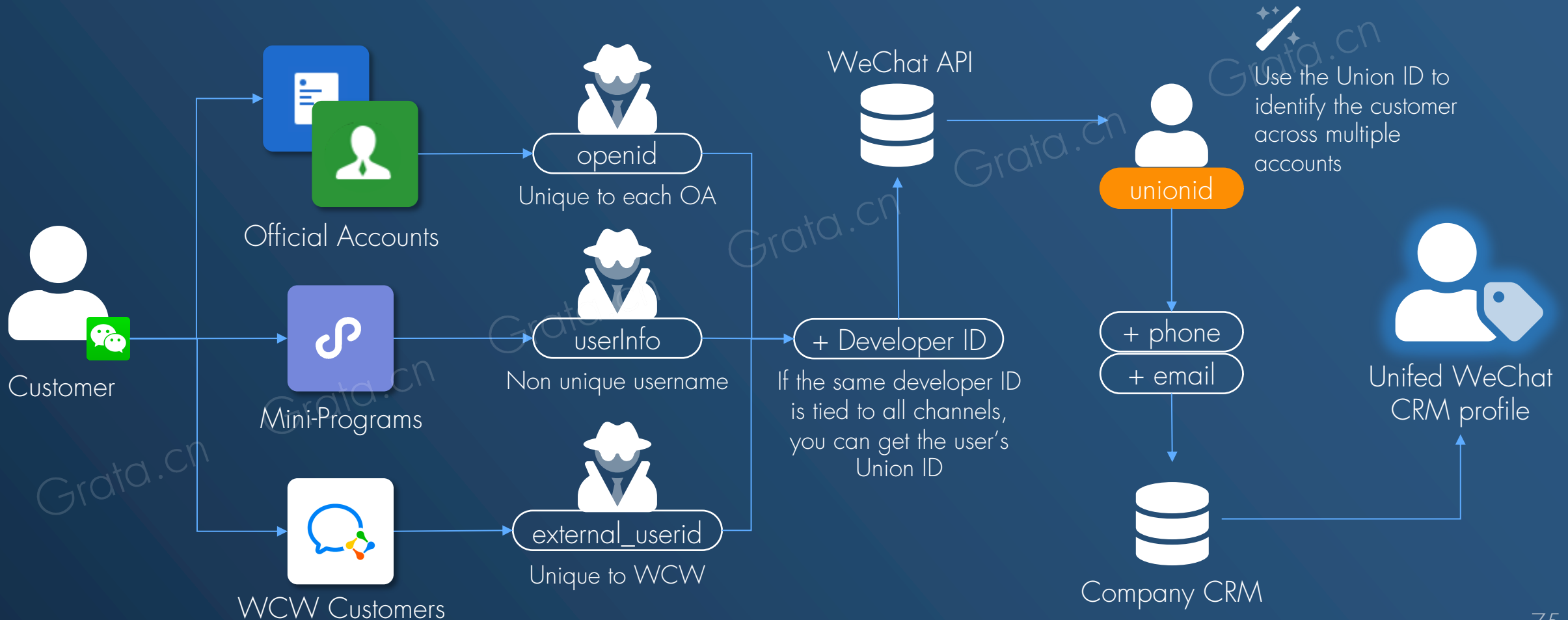
Group Chats

Group chats can be a powerful community-building tool when done well. WCW's group chat manager gives you a dashboard to monitor group activity. You can also add chat bots, transfer ownership, set welcome messages, use quick replies, live stream, and more. Mixed WeChat-WCW group chats can have a maximum of 200 members.



Unified Customer Marketing

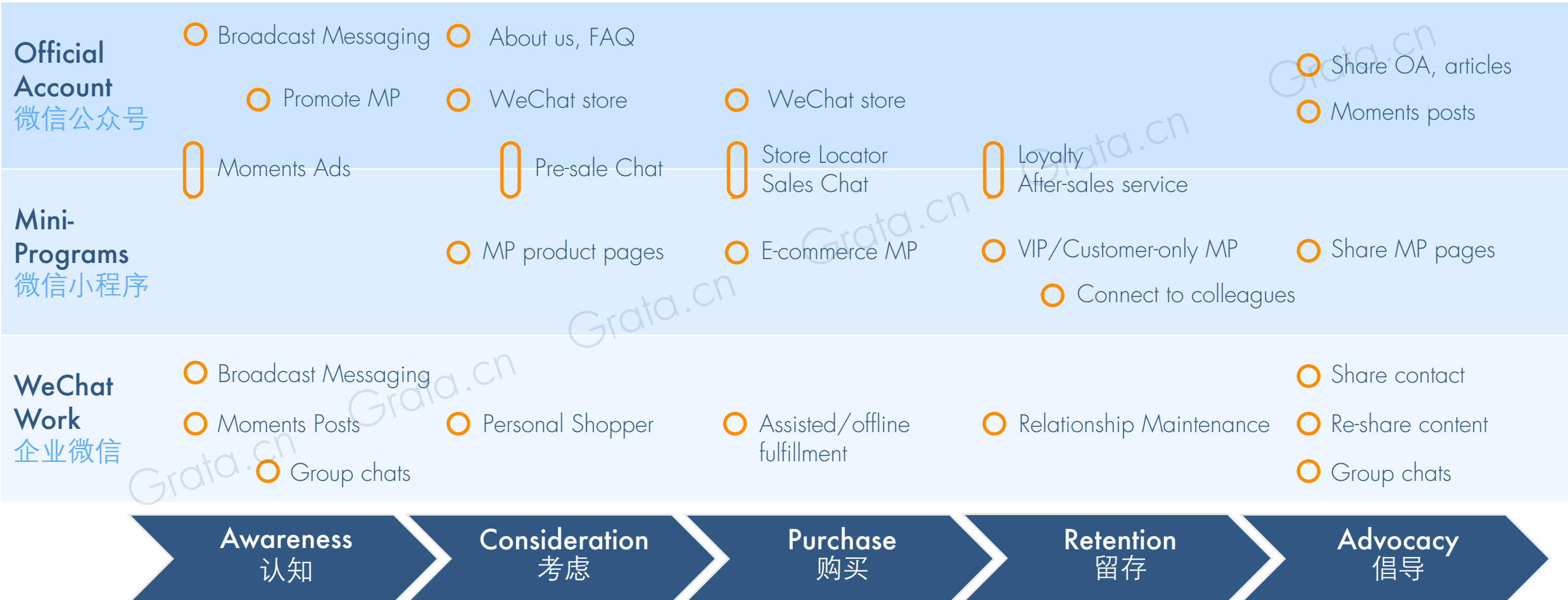
For high-affinity customers that follow your Official Accounts, interact with your Mini-Programs, and connect with your employees in WeChat Work, the best brands create a unified customer profile on their backend. You will need the user's Union ID to accomplish this.



WeChat Customer Journey

Most brands will create a mix of digital touchpoints across their official accounts, mini-programs, and WeChat Work

微信客户旅程



WeChat Work Apps

Workplace tools configured for your team

企业微信应用



Skip



Home

WeChat Work Apps

Apps include Tencent “basic” apps, smart devices, third-party apps and mini-programs, and self-built apps and mini-programs.

Self-built apps don’t require any coding to be useful. One way to think of them is as internal WeChat official accounts.

Each app can be enabled for all users or just a segmentation of users. Apps don’t require any additional installation for your employees.

Each app can have its own list of admin users.

Creating your own apps

One of the first things companies migrate to WeChat Work is their internal communication. For company announcements and internal notifications, you can setup an apps for each topic. Treat them like WeChat official accounts.

All you need to get started is an app name, logo, and to set user visibility. There's no coding required.

Use menu buttons to give employees access to related content and then use the broadcast messaging feature on the backend to send announcements.

Self-built Apps



Send Messages

Broadcast messages to any segmentation of employees from the WCW backend, or send messages via the API



Receive Messages

View received messages and set auto-replies on the WCW backend, or forward messages to your own server



Custom Menu

Similar to Official Accounts, set 3x5 menu configuration for links, MPs, text messages, and more



Add to chat sidebar

You can make WCW apps available in the chat side bar for use in external chats



公告

App Messaging

Message from any self-built app or use the Announcement app.

Unlike Official Accounts that only allow broadcast messaging four times monthly, app messages are basically unlimited.*

And segmentation is easy.

*Your broadcast message limitation is calculated as your WCVW account user limit x 30. For example, unverified accounts have a maximum of 200 users, so you could send 6,000 daily messages. A message sent to 100 users counts as 100 messages.

App Name:  Brand Hub [Modify](#)

Select recipients

 Text  Document with external link  Image  Audio  Video  File [Select](#)

Enter directly...

Share Setting: ☒ Unshare with watermark enabled

Send

Scheduled delivery

Save as Draft

Preview



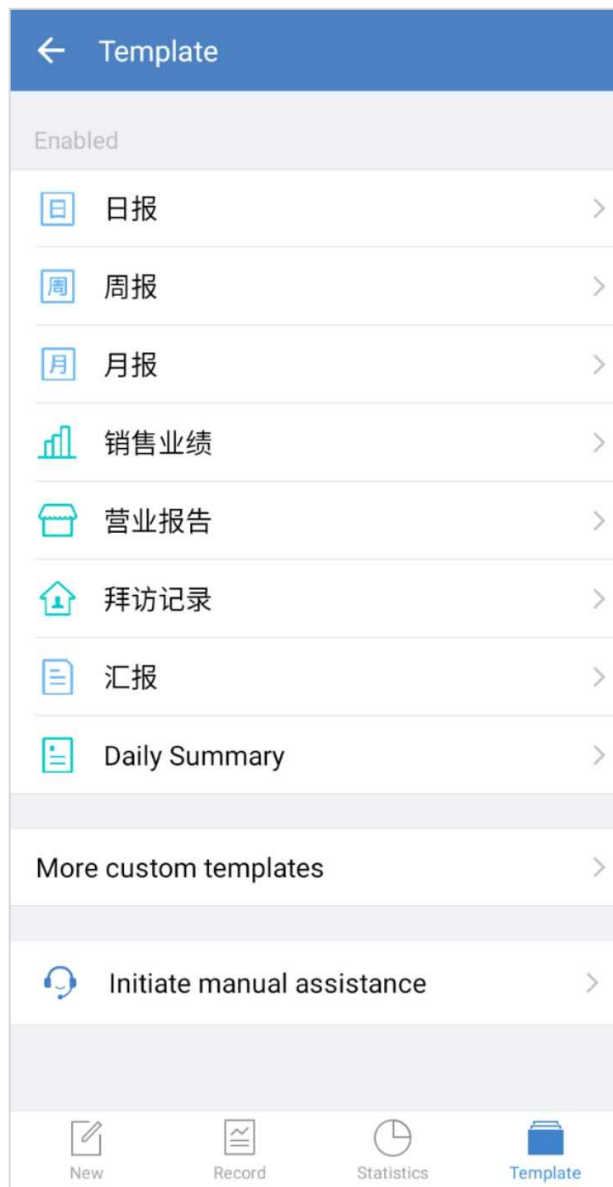
汇报

Report App

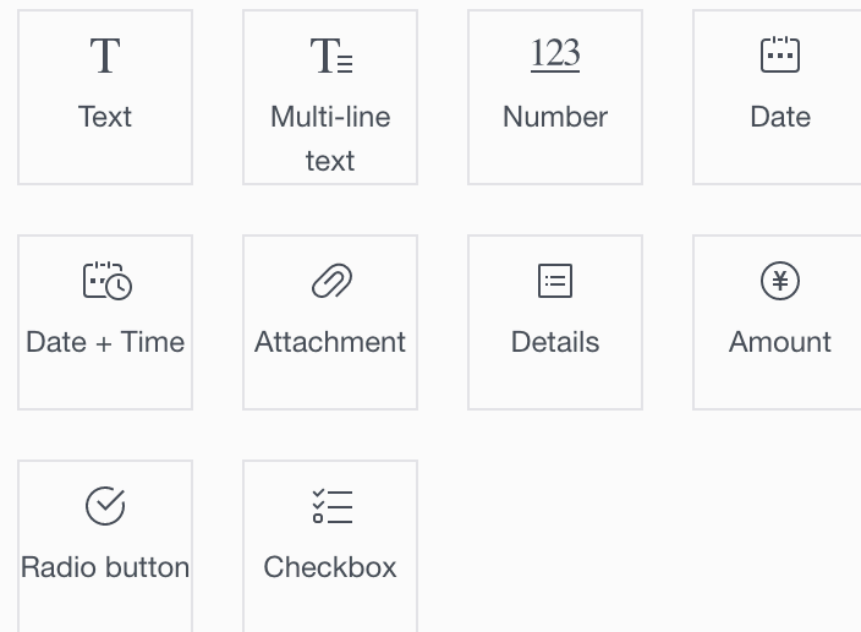
A useful app to schedule daily, weekly, and monthly reports, with dozens of customizable templates. Assign reports to employees and set visibility for managers to review the data.

Automated reminders help increase participation rates.

Export the data to Excel



Available field types





审批

Approval App

An impressive collection of customizable templates for nearly any office approval.

Set an approval process for each form, including multiple approvers, copy approvals to others, notifications, and more.

Approval templates have a multi-language feature allowing you to translate the template into a second language.

Add Template

Leave & overtime

Leave

Overtime

Business Trip

Offsite

Administrative

Meeting Room Book...

Requisition

Maintenance

Company Seal

All AdministrativeTe...

Finance

Reimbursement

Expense

Approval process

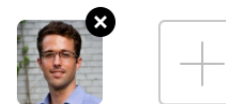


Default approver



Direct su...
(Agree b...

Default Cc recipients



Andrew ...

Conditional approval process

Add

Approval process varies with specific co

Viewing Permission

☒ Only admins, applicants, approvers, and cc rec

Modify the permission

☒ When submitting an application, the employee

☐ When submitting an application, the employee

Revoke permissions

☐ Revoking is allowed after approved. After be

Cc notification

☒ Make a Cc when submitting an application.

☐ Cc upon approval

☐ Make a Cc at the time of both the submission

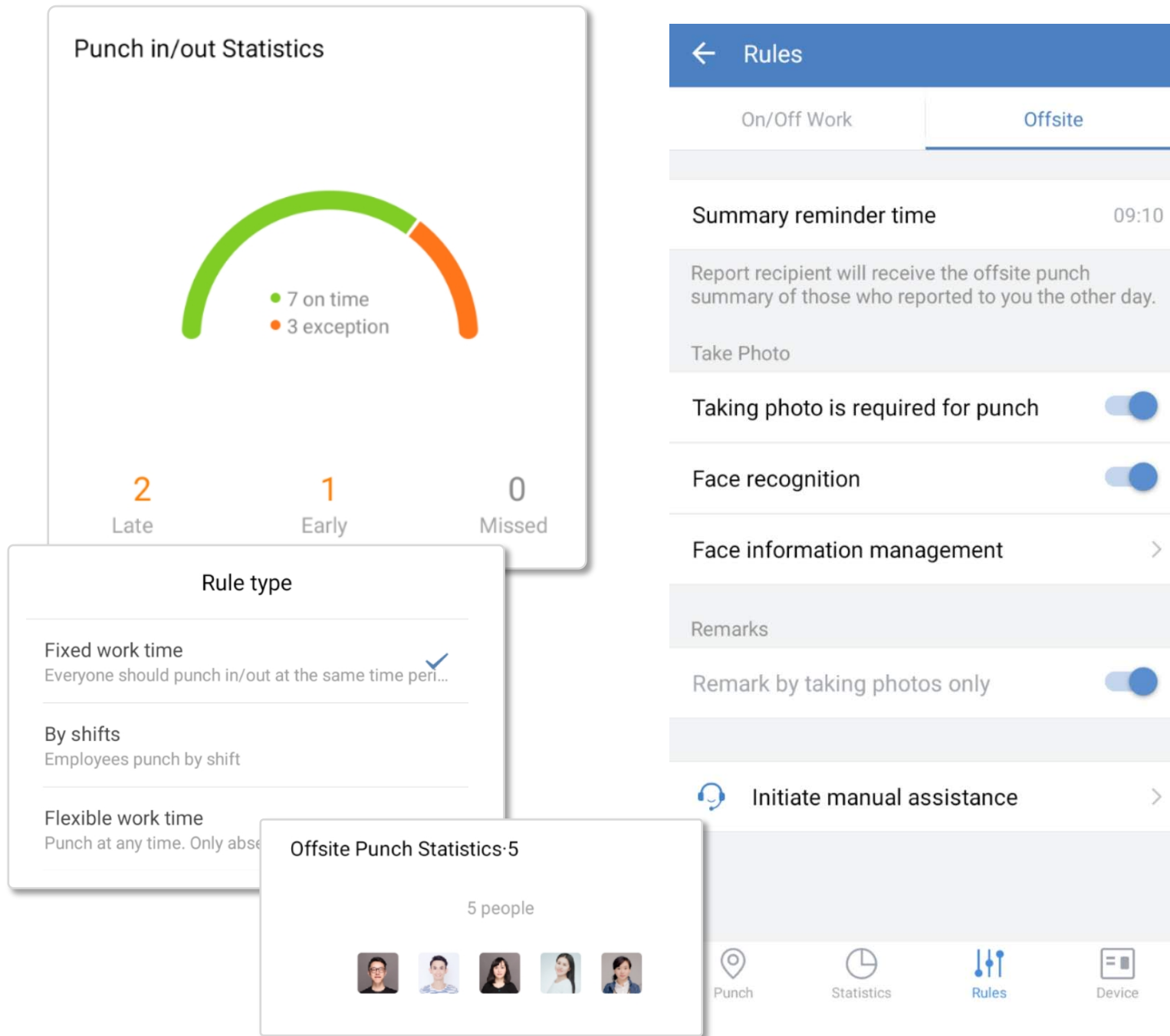


打卡

Attendance App

Set rules for teams that work on regular hours, flexible hours, or in shifts. Employees are reminded to punch-in, including various verification methods such as GPS location, office wifi connection, facial recognition, and camera-only image upload. Exceptions are logged.

The app synchs with leave requests from the Approval app.



Smart Devices

智能设备

WeChat Work opened their official smart device store on [JD.com](https://jd.com) in September 2019. Products include WeChat Work compatible 4K displays, set boxes, printers, and attendance machines.



Dozens of third-party apps and mini-programs



Mobile Office
移动办公



Team Collaboration
团队协作



Human Resources
人力资源



CRM
客户关系



Corporate Training
企业培训



Company Culture
文化建设



Expenses
财务报销



Supply Chain
提供连管理



Workflow
表单流程



Digital Contracts
电子合同



Corporate Services
企业服务

Hundreds of developer interfaces to extend capabilities



User Management
通讯录管理



App Management
应用管理



Messaging
消息推送



WeChat Work Login
身份验证



Javascript SDK
移动端 JS-SDK



Content Management
素材管理



Payments & Receipts
企业支付及电子发票



Smart Hardware
智能硬件

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Andrew Schorr
founder @Grata

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 [andrew_schorr](#)

Thank you!

About Grata



Grata is made-for-China live chat software
for WeChat official accounts and mini-
programs, WeChat Work, and web chat.

Find out more at grata.co or grata.cn

An unbranded copy of this PDF can be purchased for 3,600RMB



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