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INDITION COMMERCE

Customer Management

Frequently Asked Questions

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Quick answers for serving customers, maintaining their information and planning relevant follow-up. These answers describe the everyday customer experience in business language.

Contents

- Customer profiles and everyday service
- Assisted orders and customer follow-up
- AI assistance and organized customer records

Customer profiles and everyday service

Can we record walk-in and phone customers?

Yes. Create a customer profile with first and last name and a primary email address or phone number. The profile brings their shopping and service history into the workspace. You can invite them to create an online account later when they want that access.

What information can we keep on a profile?

Names, company details, primary and alternate email, phone contacts, marketing preferences and applicable tax information. The workspace also connects addresses, notes, documents, orders, saved payment methods and carts.

How do we find a customer quickly?

Search using a name, company, email, phone number or address detail. Name matching can recognize minor spelling variations. Use the customer details, column filters and saved lists to focus on the intended person.

Can a customer have several addresses?

Yes. Maintain billing and shipping addresses and choose a default for each type. Searchable state choices, phone formatting and address-verification suggestions help staff prepare the address.

How do staff share the context from a conversation?

Add a note with a clear title and useful details, or attach a relevant document. Customer calling tools can also record call outcomes as notes so colleagues can continue the conversation.

Where do we manage communication preferences?

Customer profiles hold newsletter and text-message marketing choices. Addresses hold order-related notification choices. Use the setting appropriate to the customer’s request and the type of communication.

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Assisted orders and customer follow-up

Can we place an order with a customer over the phone?

Yes. Build or resume the customer cart, select addresses and delivery choices, review the total and complete an authorized checkout. Saved payment methods and account terms appear according to the services and eligibility configured for the business.

Can we save a cart and finish it later?

Yes. Save the customer cart and reopen it when the customer is ready. Eligible saved carts can also be handed to the in-store checkout where that workflow is offered.

What makes a Customer List useful?

It saves the criteria for an audience, such as purchase history, a product or store, location, contact details or program participation. Preview the audience, save the list and reuse it for follow-up.

Can we combine several audience conditions?

Yes. Choose whether all conditions or any condition should match, then add the criteria and date windows relevant to the campaign. The preview and readable summary help you review who the list is intended to include.

How can repair and loyalty activity help a campaign?

When your business uses these services, the relevant repair, rewards, layaway and subscription choices can be used in Customer Lists. This helps staff prepare follow-up around the customer’s relationship with the business.

Can we prepare lists for email, calls and mailings?

Yes. Choose an export preset for mailing, email, calls or full-profile information and the available Excel or CSV format. Saved customer audiences can also supply calling campaigns.

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AI assistance and organized customer records

What can AI assistance help staff prepare?

A customer brief, relevant product suggestions, an email or text draft and a call script. It can also propose audience conditions from a description or suggest lists. Staff review and personalize the output before using the appropriate save or sending action.

Can we import our existing customer spreadsheet?

Yes. Upload CSV or Excel, choose the import mode and matching field, map the columns and review the samples. Apply or queue the import and use Import Logs to review the resulting records. Saved mapping templates help with repeat imports.

Can we consolidate duplicate customers?

Yes. Select two to twenty matching profiles, review the merge preview and choose the primary record. Confirm the contacts, online account ownership and related history before merging. Merge History keeps a record of the completed operation.

How do we export a selected group?

Select customers in the grid and use the selected-count link to review them together. Choose the selected scope for the Excel export. The grid also offers all-record and filtered-result scopes.

Can we give different staff different access?

Yes. Staff permissions organize access to customer information and actions such as account assistance, imports, exports, lists, assisted checkout and AI features. Your administrator can align access with each person’s responsibilities.

Where should a new staff member start?

Use the Setup Guide to understand the team’s customer-information practices, then follow the User Manual to find a profile, add a note, prepare an address, build a cart and create a useful list.

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