indition™

INDITION COMMERCE

Customer Management

Feature List

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Indition Customer Management brings contact details, purchase history, conversations and selling tools into one customer workspace. Help your team recognize each shopper, provide informed service and build relevant follow-up audiences.

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Know your customers and find them quickly

One place for customer details

Maintain personal and company profiles with names, primary and alternate email addresses, phone numbers, mobile numbers and fax details. Record newsletter and text-message preferences, tax-exempt information and useful staff notes.

Serve walk-in and phone customers with a shopping profile, and invite them to create an online account when they are ready. A customer can begin with a primary phone number or email address, giving staff a practical way to start the relationship.

Find the right person during a conversation

- Search by name, company, email, phone or address information.
- Name matching can recognize minor spelling variations and place relevant results together.
- Use column and date filters to focus on the records you need.
- Open a saved Customer List directly in the customer grid.
- Keep a selection while moving between pages, view selected records together and export the chosen audience to Excel.

Keep the service context close at hand

The customer workspace brings together profile details, notes, documents, billing and shipping addresses, orders, saved payment methods and saved or abandoned carts. Staff can review earlier activity before helping with the next purchase or service request.

Make everyday entry easier

Clear field guidance, formatted phone entry, searchable state choices and consistent Company and preference switches make customer and address forms easier to complete. Default billing and shipping addresses help staff prepare the next order efficiently.

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Turn customer conversations into sales

Build an order with the customer

Find products, add items to a customer cart, set quantities and save the cart for a later conversation. Resume a saved cart to continue the sale, or proceed to assisted checkout with the customer’s chosen addresses and delivery preferences.

- Review item details, discounts, delivery charges, tax and the order total together.
- Apply a coupon or choose the delivery options offered for the order.
- Use eligible saved payment methods or the configured payment process.
- Offer account terms, purchase-order references and authorized-buyer selection for qualifying business accounts.
- Include eligible pickup choices and promotional free items.
- Complete the order with customer authorization and review the order confirmation.

Maintain helpful address and service records

Save multiple billing and shipping addresses, choose a default for each type and review address-verification suggestions. Keep order-related email and text preferences with the address, and marketing preferences with the customer profile.

Add a note after an important conversation and attach relevant documents. Call outcomes can also become notes, giving the next staff member useful context for a consistent service experience.

Support the customer account journey

Send an account invitation when the customer has a suitable email address and wants online access. Authorized staff can use the available account-management actions, including password-reset assistance and account-status changes, from the customer workflow.

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Build relevant audiences and follow up

Save the audience you want to reach

Customer Lists turn your business criteria into a reusable audience. Start with a template or a blank list, give it a meaningful name and choose whether all conditions or any condition should match.

- Use purchase history, purchase dates, products, stores, addresses, contact details and profile preferences.
- Include relevant repair, loyalty, layaway and subscription criteria when your business uses those services.
- Preview the count and read the audience summary as you build the list.
- Save, duplicate or refresh a list; archive it after a campaign and restore it for future use.
- Open the audience in the customer grid or export it for mailing, email and calling workflows.

Prepare the right information for each channel

List export presets provide mailing, email, call or full-profile information in the available Excel or CSV format. Export history records who prepared the file, when it was created and how many customer records it contains. Contact preferences guide the communication workflow.

Use AI to prepare a personal response

With AI assistance enabled for the relevant staff, create a customer brief, explore product suggestions and draft an email, text message or call script. Staff review and personalize the draft, then use the appropriate sending workflow.

AI can also turn an audience description into proposed list conditions or suggest useful audiences. Review the conditions and preview before saving the list, keeping your team in control of the campaign.

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Connected customer experiences

Customer experience	What your team can do
Online shopping and accounts	Connect contact details, account access, orders and saved carts so staff can continue the customer conversation.
In-store shopping	Serve walk-in shoppers, work with store and purchase history, and continue eligible saved carts at the register.
Payments and business accounts	Use saved payment methods, eligible account terms, purchase-order references and authorized-buyer choices during assisted checkout.
Pickup and promotions	Offer the pickup choices and promotional items available for the order.
Repairs and service	Build audiences around service activity and include relevant service context in an AI-assisted customer brief.
Loyalty and ongoing purchases	Use rewards, layaway and subscription criteria to prepare relevant follow-up lists.
Classes and events	Start a customer audience from the education workflow, then review its purchase and exclusion criteria.
Customer calls	Recognize callers, open their customer details, record call outcomes and use saved audiences for calling campaigns.

Keep a well-organized customer base

Import customer files with a guided upload and field-mapping workflow. Reuse saved mappings and follow the import history. Merge duplicate profiles through a preview that lets staff choose the primary record and review the associated customer history.

Give each staff member the right tools

Staff permissions organize access to customer details, exports, account actions, assisted selling and AI assistance. Notes, import history, export history and merge history provide a useful record of the team’s work.

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