indition™

INDITION COMMERCE

Customer Management

Customer Management Overview

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Give your team the context to make every customer interaction more personal. Indition Customer Management connects customer history, conversations and selling tools so staff can provide attentive service across the store, website and phone.

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Make the next conversation more useful

Recognize the customer and their history

A familiar customer may arrive with a question about a past order, a product they considered or a service conversation. Open their profile and bring their contact details, orders, addresses, notes and saved carts into view. Your team can pick up the conversation with useful context already at hand.

Walk-in and phone shoppers can have a customer profile from their first visit. When they want online access, an account invitation helps extend that relationship to your website.

Find the details that move service forward

Search for a name, company, email, phone number or address. Relevant matching and focused filters help staff locate the right record. Saved lists and selected-record views make it easier to work with a particular group of customers.

Turn advice into an assisted order

Build a cart while discussing products with the customer. Choose quantities, review available delivery options and apply the relevant promotion. Save the cart for a later conversation or complete an authorized checkout with the customer’s preferred eligible payment option.

Business-account terms, pickup choices and saved payment methods fit into the selling experience when those services are part of your business. The customer record keeps the order connected to the relationship.

Keep the conversation available to the team

Add a concise note, attach a useful document or record a call outcome. The next staff member can see the context and continue with a consistent, informed response.

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Build relationships beyond the first purchase

Create audiences around real customer interests

Customer Lists help you identify people by purchase history, products, stores, location and contact preferences. Your repair, loyalty, layaway and subscription services can add further context. Preview an audience, save its criteria and reuse it for a relevant follow-up campaign.

Prepare a mailing audience, export an email list or start a calling campaign. Templates, readable audience summaries and saved list management give staff a repeatable way to plan outreach.

Prepare a more personal message

AI assistance can bring customer context into a brief, suggest relevant products and prepare a message or call script. Your team reviews the suggestion, adds the human detail and chooses the next action. AI-assisted list building can also help turn a campaign idea into a practical audience.

Connect shopping service and customer calls

Online orders, in-store purchases and saved carts support the sales conversation. Repair activity can inform service follow-up. Loyalty and recurring-purchase criteria help identify relevant customers, while calling tools connect the conversation back to the customer record.

Keep the customer base ready for growth

Guided spreadsheet imports help bring customer records into the workspace. Merge previews help staff consolidate duplicate profiles and their associated history. Staff permissions and activity records support an organized approach as the team grows.

See the customer journey in action

Explore how your team can find a shopper, resume a saved cart, build a useful audience and prepare a personal follow-up. Indition Customer Management gives those everyday moments a shared place to happen.

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