indition™

INDITION COMMERCE

Customer Management

Setup Guide

Release 5.14.6 · October 2026

© 2026 Indition Corp. All rights reserved. Indition™ and the Indition logo are trademarks of Indition Corp. All other product names, logos, and brands are the property of their respective owners.

Prepare Customer Management for your team’s daily work. Organize staff access, customer details, selling options and follow-up audiences so each person has a clear starting point.

Contents

- Prepare your customer workspace
- Connect the customer journeys you offer
- Prepare audiences and an everyday routine

Prepare your customer workspace

Choose the work each staff member will do

Have your administrator assign the appropriate access for customer maintenance, account assistance, notes, documents, lists, imports, exports and assisted selling. Choose who will use AI assistance and who will maintain communication preferences.

Agree how to maintain customer details

1. Choose the primary contact method to record during a visit or call: email, phone or both.
2. Agree how staff will enter company information, tax-exempt details and marketing preferences.
3. Choose a consistent way to write helpful service notes and name attached documents.
4. Review how billing and shipping addresses will be verified and selected as defaults.
5. Confirm the invitation process for customers who want online account access.

Create the first profile

Open Customers and choose Create Customer. Enter first and last name and at least one primary contact method. Turn Company on for a business customer and enter the company name. Add other useful contacts and preferences, then save.

Bring existing customer records into the workspace

Use Import to upload a CSV or Excel file. Select the intended import mode and matching field, then map the incoming columns to customer information. Review the samples and apply or queue the import. Save the mapping for future files with the same layout.

Import Logs provides the processing history and related records. Use it to review the imported information before the team begins follow-up or assisted selling.

© 2026 Indition Corp · Indition™ is a trademark of Indition Corp. All rights reserved.

Connect the customer journeys you offer

Business workflow	Setup choices to review
Online accounts	Invitation delivery, account assistance and the staff who will manage account actions.
In-store service	Walk-in customer capture, purchase and store history, and eligible saved-cart handoff to the register.
Assisted orders	Product access, billing and shipping addresses, delivery choices and payment options.
Business accounts	Account-term eligibility, purchase-order references and authorized-buyer choices.
Pickup and promotions	The pickup choices and promotional offers available for the order.
Repairs and loyalty	The service and program criteria your team wants to use in follow-up audiences.
Classes and events	The purchase and exclusion criteria for an audience prepared from the education workflow.
Customer calling	Caller identification, customer links, call notes and the saved audiences used for campaigns.

Set communication preferences purposefully

Maintain newsletter and text-message marketing preferences on the customer profile. Review order-related email and text settings when preparing addresses. This gives the team a clear place to manage each type of communication.

Prepare AI assistance

Choose the customer brief, product suggestion, message-draft and audience-building features your team will use. Configure staff access and the customer information available to those features. Establish a simple review step so staff personalize suggestions before using them.

© 2026 Indition Corp · Indition™ is a trademark of Indition Corp. All rights reserved.

Prepare audiences and an everyday routine

Create a useful first Customer List

1. Open Customer Lists and start from a template or a blank list.
2. Give the list a recognizable name tied to the purpose of the follow-up.
3. Choose whether all conditions or any condition should match.
4. Add the purchase, date, location, product, contact or program criteria you need.
5. Review the preview count and audience summary, then save.
6. Open the saved audience in Customers or choose the appropriate export preset.

Practice a complete service conversation

Find a customer by name, company, contact information or address. Review the profile, add a useful note and choose the appropriate billing and shipping addresses. Build a cart, review the total and save it for a later conversation or complete an authorized order.

Keep customer information organized

Set a routine for updating contact details, reviewing import results and refreshing saved audiences. Use duplicate-profile previews to choose the primary record and confirm the customer history before merging records.

Share the guidance by role

- Front-line staff: finding customers, notes, addresses and assisted orders in the User Manual.
- Marketing and calling staff: Customer Lists, export presets, preferences and AI-assisted drafts.
- Administrators: staff access, imports, account actions and merge history.
- Managers: the Feature List and Customer Workflow Reference for a view of the connected customer experience.

© 2026 Indition Corp · Indition™ is a trademark of Indition Corp. All rights reserved.