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INDITION COMMERCE

Customer Management

User Manual

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Use Customer Management to find shoppers, maintain their details, continue a sale and prepare useful follow-up. This guide follows the everyday tasks your team performs in the customer workspace.

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Find, create and maintain a customer

Find a customer

Open Customers and enter a name, company, email, phone or address detail in the main search. Review the matching profile details to choose the intended customer. Use individual column filters, date filters or a saved Customer List to focus the results.

Select the rows you want to work with and use the selected-count link to see them together. Show Full Grid returns to the broader result set while keeping your selection. Clear Filters resets the filters and selection. Choose the page size that suits the task.

Create a customer

1. Choose Create Customer and enter First Name and Last Name.
2. Enter Primary Email or Primary Phone; you can provide both.
3. For a business customer, turn Company on and enter Company Name.
4. Add alternate email, mobile or fax details as appropriate. Follow the phone-format guidance.
5. Set the newsletter, text-message, tax-exempt and other applicable profile preferences.
6. Save the profile. Use Send Invite when the customer has a suitable email address and wants online access.

Update details and assist with an account

Open the customer and choose Update from Actions. Review the contacts, company details and preferences, then save. For online access, use the account actions available to your role, such as invitation, password-reset assistance and account-status management.

A shopping profile holds the customer’s business relationship and activity. The linked online account provides sign-in access. Primary contact email and online sign-in email may be maintained separately; select the field that matches the customer’s request.

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Keep addresses and service context current

Add a useful note

Choose Add Note and enter a clear title and the details of the conversation or service request. Notes retain line breaks so staff can organize the information. Use customer notes for information that helps colleagues serve that customer.

Attach a document

Choose Add Document, select a supported file and save it with the customer. Use the document action to retrieve it when needed. Keep filenames and descriptions meaningful so colleagues can recognize the right attachment.

Add a billing or shipping address

1. Choose Add Billing Address or Add Shipping Address.
2. Complete the required contact and address fields, including phone and email.
3. Search the state list to select the intended state and include any second address line.
4. Review the order-related email and text preferences.
5. Review any address-verification suggestion and choose the appropriate address.
6. Save the address and make it the default for that address type when appropriate.

Review purchases and payment methods

Open the order history to find the relevant purchase and continue its order or refund workflow. Review saved payment methods and use the payment workflow for adding or managing an eligible payment profile.

Maintain the right communication choices

Use the customer’s newsletter and text-message preferences for marketing choices. Use address notification preferences for order-related messages. Review those settings as part of the customer’s requested update or the planned communication.

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Build and complete an assisted order

Start or resume the cart

Open or create a customer cart, search for the intended products and add them. Set the quantities and save the cart. A saved cart can be reopened when the customer returns or resumes the conversation.

Complete the checkout conversation

1. Choose Checkout and review the customer and cart items.
2. Select billing and shipping addresses, or enter the new address information.
3. Review the delivery choices offered for each item, including pickup where applicable.
4. Apply the appropriate coupon and review subtotal, discounts, shipping, tax and total.
5. Select the eligible payment method or account-terms option. Complete purchase-order or authorized-buyer details when requested.
6. Confirm the items, total and payment authorization with the customer, then choose Complete Order.
7. Review the resulting confirmation and use the order record for subsequent service.

Continue the sale at the register

Use the saved-cart handoff when your in-store checkout offers it for the selected cart. Staff can continue an eligible sale in the selling workflow that fits the customer’s visit.

Connect the next conversation

Add a note when the customer has a product question, a delivery preference or an agreed follow-up. The saved cart and customer history give the next staff member the context to continue.

Recognize business-account needs

For eligible accounts, terms, purchase-order references and authorized-buyer choices support the business purchasing process. Review the amount due and the available payment arrangement with the customer during checkout.

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Create audiences and prepare follow-up

Build a Customer List

1. Open Customer Lists and choose a template or start a blank list.
2. Enter a meaningful name and choose All conditions or Any condition.
3. Add the purchase, date, store, product, address, contact and profile conditions for your audience.
4. Add the relevant repair, loyalty, layaway or subscription criteria offered for your business.
5. Review the count and audience summary as the conditions change, then save the list.

Reuse and organize your audiences

Open in Customers Grid brings the saved audience into the main customer view. Duplicate or Save as New List gives you a starting point for another campaign. Refresh updates the saved membership information. Archive completed campaigns and restore the list when you want to use it again.

Prepare a mailing, email or calling file

Save the intended list rules, then choose a mailing, email, call or full-profile export preset. Select the available Excel or CSV format. Use the preset suited to the channel and review customer communication preferences in the sending workflow. Export history records the user, date, format and record count.

Use AI assistance

Open Customer Brief for a summary, Next Product for suggestions or Message Draft for an email, text or call script. Review the details and personalize the tone, then use the appropriate communication workflow. For a list, describe the audience you want, review the proposed conditions and preview, then save.

Connect customer calls

Calling tools can identify the matching customer, open their record and add call outcomes as notes. Campaigns can use active saved lists and evaluate the saved criteria when preparing the people to call.

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Import, organize and consolidate records

Import customer information

1. Choose Import and upload the CSV or Excel file.
2. Select the import mode and the field used to match records.
3. Map the incoming columns to customer fields and review the sample values.
4. Apply or queue the import. Save a mapping template for future files with the same structure.
5. Open Import Logs to review status, records and the related source or mapping files.

Export the records for your task

Use the Customers grid export to choose all, filtered or selected records and download an Excel workbook. Review the selected scope before preparing the file. Customer List presets provide the channel-specific information for outreach.

Bring duplicate profiles together

1. Select two to twenty matching customer records and choose Merge Selected Customers.
2. Review the preview and choose the primary customer record to retain.
3. Check contact details, online account ownership, related history and the records included in the merge.
4. Confirm the intended customer and merge the profiles.
5. Review the consolidated customer and its Merge History entry.

The merge brings supported purchase, address, note, document and service relationships together. Eligible store-credit and rewards balances follow their combination rules. Merge History records the staff member, date, primary profile and related-record counts, and the primary customer receives a note.

Make record maintenance a routine

Review customer updates, import results and saved audiences regularly. Use clear notes and the available history views to help colleagues understand the work already completed and the next customer action.

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