



Indition CRA - Marketing Automation

Setup Guide

Readiness, enablement order and first-use verification for the 45 workflows that make up the product.



Product documentation pack · Documentation edition 1 · September 2026



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Welcome to Indition CRA - Marketing Automation. Five minutes from now you will know your way around. Twenty minutes from now you can have sent your first campaign. Everything after section 3 is optional and can wait until you need it.

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1. Before you begin

1.1 What you already have

Your account arrives ready to send. There is no mail server to configure, nothing to install, and no setup wizard to complete before you can do something useful. These are already working:

ALREADY SET UP	WHAT IT MEANS FOR YOU
Email sending	You can send as soon as you have an audience.
Built-in site fields	Your company name, website, phone, city and state are available as personalization tokens straight away.
Consent handling	Unsubscribes and bounces are recorded and enforced automatically from your first send. You do not switch this on.
Reporting	Every send is tracked. Deliveries, opens, clicks and unsubscribes all record without configuration.

Everything else in this guide is additive. Set it up when you need it, not before.

1.2 Signing in

Use the Indition CRA Marketing Automation app. Your app switcher may label it **Indition CRA Marketing Automation (AI)**. If you also see a Legacy application, do not use it — its screens and settings are different, and nothing in this guide applies to it.

If a screen mentioned here is missing for you, it is usually one of three things: the module is not part of your plan, your role does not include that operation, or a connected service is not configured yet. Your administrator can confirm which.

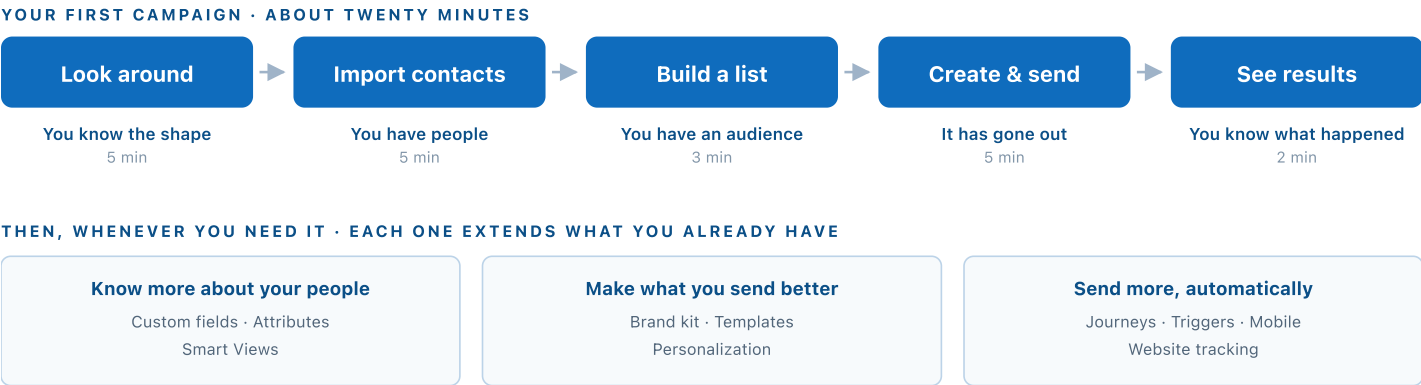
1.3 Your first five minutes

Before changing anything, spend five minutes looking at four screens. You will know where you stand and you will not have created anything you need to clean up later.

OPEN THIS	TO SEE
Contacts	Who is already in your account. A new account may legitimately be empty.
Contact Lists	Any audiences already defined. Each shows Total Contacts and Eligible Emails — two different figures, and the second is your real reach.
Emails	Any content already available to send.
Email Deliveries	The record of everything that has ever been sent from this account. Empty on a new account — this is where your results will appear.

That is the shape of the product: people, audiences, content, results. Everything else supports one of those four.

1.4 The path through this guide



Set up whichever you need, in any order, at any time. None of them is a prerequisite for the others.

IF YOU WANT TO...	GO TO	ROUGHLY
Send your first campaign	Section 2	20 minutes
Get properly established	Section 3	Your first week
Put your brand on everything	Section 4	30 minutes
Personalize what you send	Section 5	30 minutes
Segment your audience properly	Section 6	1 hour
Automate multi-step journeys	Section 7	1 hour
Send SMS, MMS or RCS	Section 8	Provider account needed
Track your website	Section 9	Developer needed
Understand consent handling	Section 10	15 minutes reading

2. Your first campaign

About twenty minutes, using your own data. At the end you will have sent to a real audience and seen the results.

2.1 Bring in your contacts

Start with a small, clean file — a few dozen rows is ideal for a first run. You can import the rest once you have seen how it behaves.

1. Prepare a CSV, XLSX or XLS file with a header row. One column must hold the email address.
2. Go to **Contacts > Import Contacts**.
3. Choose the file. Wait for your column headings and sample rows to appear.
4. Choose to add new contacts, and map the email column as the identity.
5. Map your other columns — first name, last name, company, whatever you have.
6. Set up **Email Mappings** so the address, its status and its subscription come from the right columns.
Subscription is held per address, so it belongs here rather than on the contact.
7. Review the preview, which shows five rows by default. Check the values line up with the right columns.
8. Choose **Apply**.
9. Check the results. A large file processes in the background and appears in **My Imports**.

The preview is the step to slow down for. An import cannot be undone. Two minutes checking it is cheaper than correcting several hundred contacts afterwards. Rows that fail validation are reported individually, so one bad address never stops the rest, and anything you did not map is left untouched.

2.2 Group them into a list

1. Go to **Contact Lists** and create a list.
2. Give it a name another person would understand — "Newsletter subscribers", not "List 1".
3. In **Available Contacts**, find the contacts you just imported and add them.
4. Review the pending audience.
5. Choose **Save Contact List**.
6. Reopen the list and check the summary.

The summary shows **Total Contacts** and **Eligible Emails** as two separate figures. They are meant to differ — the first counts people, the second counts addresses you may actually mail. The second is your real reach, and the one to quote.

2.3 Prepare your email

1. Go to **Emails**.

2. Open an existing email, or create one. It opens in either the visual builder or the code editor depending on its type.
3. Write your subject line and content.
4. Use the personalization picker to insert tokens rather than typing them — for example a contact's first name.
5. **Preview it.** Check your links, images and how any personalization resolves.
6. Choose **Save**.

If you want a final check before committing, send yourself a test from the email. A test goes only to the address you type — it does not touch your audience and does not create any records beyond a row in Test Email Logs.

2.4 Send it

1. With the email selected in **Emails**, open **Send Once**.
2. Check the source email named in the drawer title is the right one.
3. Enter a name for the send and review the subject.
4. Choose your recipients — **Primary Only** sends to each contact's primary address, **All Emails** sends to every eligible address they have.
5. Choose your contact list.
6. Review the eligibility information shown.
7. Choose **Send Now**, or **Schedule Later** with a future date and time — check the timezone displayed on screen.
8. Review content, audience, sender, subject and timing together.
9. Choose **Send**.

This one is real. Send Once is not a preview — the final button sends to everyone in your audience. Read the summary before you press it.

2.5 Watch the results

1. Go to **Email Deliveries**.
2. Filter to your campaign.
3. Watch the statuses move: scheduled, handed off to the provider, then delivered.
4. Use **View Email** on any row to see exactly what that person received.
5. Check **Email Opens** and **Link Clicks** over the next day or two.

Handed Off means your provider accepted the message; delivery is confirmed separately and slightly later. Viewing a delivery never records an open or a click, so you can inspect freely.

2.6 Check who opted out

After a send, look at **Email Suppressions**. Anyone who unsubscribed, and any address that bounced, appears here and is blocked from future sends automatically. You do not have to do anything to make that happen — but it is worth knowing where the record lives, because it is the answer to most "why didn't they get it?" questions later.

That is the whole loop. Audience, content, send, results, consent. Everything in the rest of this guide is a richer version of those five things.

3. Your first week

You can run the product on sections 1 and 2 alone. These four are worth doing early because they get harder to retrofit.

3.1 Decide your naming conventions

Campaign names, list names and email names are how you will find things in six months. Agree a convention now — something like `2026-Q1 Newsletter – March` — and write it down. It costs nothing today.

3.2 Set up your brand kit

Thirty minutes in section 4. Everything you author afterwards draws on it, so doing it before you build much content avoids reworking that content.

3.3 Agree your custom field names

If you plan to store your own data about contacts — a renewal date, an account manager, a tier — read section 5.1 before creating any. Each field has a **variable name** that locks permanently once the field exists. It is a five-minute conversation now, or a migration later.

3.4 Create your campaign categories

Categories classify your campaigns and content. Three or four broad ones — Newsletter, Promotional, Transactional, Event — keep reporting legible once you have hundreds of campaigns. Section 6.4.

What you can safely leave

FEATURE	SET IT UP WHEN
Attributes and attribute groups	You want to segment on characteristics rather than list membership.
Smart Views	You find yourself rebuilding the same filter every week.
Email templates	You are sending the same shape of email repeatedly.
Campaigns and journeys	One send is no longer enough and you want follow-ups.
Universal triggers	You want rules that apply regardless of campaign.
Mobile messaging	You have a messaging provider account and want SMS, MMS or RCS.
Website tracking	You want website behaviour to feed your audience, and have developer time.

4. Make it look like you

Set this up when you want everything you send to carry your brand without anyone having to remember the details.

4.1 Your brand kit

A brand kit holds your logos, fonts and written guidance in one record. Content you author afterwards draws on it, and it is what AI-assisted writing uses to sound like you.

You will need: your logo files, your font choices, and a few sentences on how your brand speaks.

1. Go to **Brand Kits** and create a kit.
2. Enter the kit name and your website.
3. Upload your logos. There are four slots — Primary, Light, Dark and Icon — so your logo works on both pale and dark backgrounds. Accepted formats are JPG, PNG, GIF, WEBP and SVG, up to 5 MB each.
4. Choose your heading font, body font, a fallback font and a base text size.
5. Complete the personality fields: voice, tone, audience, traits and values.
6. Write your guidance — the rules your copy should follow, and anything to avoid.
7. Save, then reopen and check the logos display correctly.

Confirm it worked: open any email in the editor. Your fonts and logo should be available to use.

Keep one kit as the default. The default is what new content reaches for. If you later build a second kit for a sub-brand, make the replacement default *before* retiring the old one — the product protects a default kit from being deleted or deactivated while it holds that role.

4.2 Email templates

A template is a reusable design. Build the layout once and every email made from it inherits the structure, so your newsletter looks like your newsletter whoever writes it.

Worth doing when: you are sending the same shape of email repeatedly — a monthly newsletter, a product announcement, a receipt.

1. Go to **Email Templates** and start a new template.
2. Complete the template details.
3. Choose **Validate Template**. This creates the template and opens the builder.
4. Build your design — add rows, columns and content blocks.
5. Preview it, including at narrow widths, so you know it holds up on a phone.
6. Choose **Save**.
7. Reopen and check the saved design.

Confirm it worked: create a new email and check the template is offered.

Validate Template creates the template record straight away, with a minimal starter layout, and the design you build is stored when you Save. If you change your mind mid-build, rename or delete the template rather than assuming closing the editor discarded it. To branch an existing design into a variant, use **Copy** — the original is untouched.

5. Personalize your content

Set this up when you want to use your own data about people inside your content.

5.1 Contact custom fields

These are your own fields on the contact record — a renewal date, an account manager, a preferred topic. Once defined you can fill them in, segment on them, and drop them into content as personalization.

Agree the variable names first. Every field has a **Field Name** (the label people see) and a **Variable Name** (the reference your content uses). The label can be renamed whenever you like. The variable name locks permanently the moment the field is created. Five minutes agreeing these now is worth more than any other five minutes in this guide.

You will need: a list of what you want to store, and an agreed naming style — `renewal_date` and `account_manager` rather than `rd` and `am`.

1. Go to **Contact Custom Fields** and create a field.
2. Enter the Field Name, then the Variable Name. It must start with a letter and use only lowercase letters, numbers and underscores.
3. Choose the Input Type — a plain box, a longer text area, a dropdown, radio buttons or an on/off switch.
4. Choose the Data Type — Text, Email, Numeric, URL, Phone or Date.
5. For a dropdown or radio list, add your options. Give each one a distinct stored value.
6. Set any validation you need, and the order the field appears in.
7. Turn on **Allow Bulk Update** if you want to set this field for many contacts at once.
8. Save.

Confirm it worked: open any contact — the field should appear on the form. Then open an email and check the field is offered in the personalization picker.

5.2 System custom fields

These hold one value for your whole account rather than a value per person — a support URL, a current offer code, a seasonal strapline. Change the value once and every piece of content using it updates.

1. Go to **System Custom Fields** and create a field.
2. Enter the Field Name and a stable Variable Name, as above.
3. Choose the Input Type and Data Type.
4. Set the current value.
5. Save.

Confirm it worked: put the token into an email and preview it. The value should appear.

Because the value is shared, check what uses a field before changing it — that is the point of the feature, but it does mean one edit reaches everywhere at once.

5.3 Built-in site fields

Your company name, website, phone, address, city, state and country are available as personalization without you creating anything. Several are switched on in the picker already.

1. Go to **System Default Fields**.
2. Activate any field your authors should be able to insert. Deactivate any you never use, to keep the picker short.
3. Copy a token and drop it into a draft to check the value.

This screen controls which fields appear in the picker. The values themselves come from your system settings, so if a company detail is wrong, correct it there.

5.4 Using personalization well

Tokens work in more places than body text — you can put one in a button's web address, and in image source and link fields. That is how you build a link that is different for every recipient.

Always insert tokens from the picker rather than typing them, and always preview with a real contact before sending. A field a contact has no value for renders as nothing, so consider whether a sentence still reads properly without it.

6. Organise your audience

Set this up when list membership alone is no longer enough to describe who you want to reach.

6.1 Attributes and attribute groups

Attributes are characteristics you record about people — interests, tiers, dates, ranges. They let you build an audience from what you know about someone rather than which list they happen to be on.

An **attribute group** organises related attributes and declares what kind of values they hold. Create the group first.

1. Go to **Attribute Groups** and create a group.
2. Name it for the kind of thing it describes — "Product interests", "Customer tier".
3. Choose the **Meta Type**, which controls what a value looks like:

META TYPE	USE IT FOR
Single Set	One choice from a fixed set — a tier, a plan.
Multiple Set	Several choices from a set — product interests.
Text Value	A free text value.
Text Range	A range between two text values.
Date Range	A period between two dates.

4. Save the group.
5. Go to **Attributes** and create the individual attributes, assigning each to your group.
6. Return to the group and check the assignments.

Confirm it worked: open a contact, go to the Attributes tab, and check you can choose your group and record a value.

Choose the meta type deliberately — it defines how values are captured, and changing it later does not convert values you have already recorded. Once an attribute is in use it becomes protected from removal, which is what stops a live segment breaking underneath you.

6.2 Getting more from lists

Beyond adding people by hand, a list can be defined by attribute criteria — everyone whose tier is Gold, everyone whose renewal falls in the next quarter.

1. Open the list in **Contact Lists**.
2. Go to **Applied Attributes**.

3. Choose the group and the attribute, then enter the value or range.
4. Check the resulting audience size before relying on it.

Lists can mix approaches — some people added directly, some matched by criteria, some imported.

6.3 Smart Views

A Smart View saves a question you ask repeatedly. Choose the data, the columns, the filters and the sort, name it, and it becomes a screen you and your colleagues can open.

1. Go to **Smart Views** and create a view.
2. Choose the dataset — this determines what fields are available.
3. Name it for the question it answers.
4. Pick your columns, filters and sort order.
5. Choose who can see it: just you, chosen people and roles, or everyone.
6. Save and check the results match what you meant to ask.

If AI assistance is available, **Create with AI** lets you describe what you want in plain language and gives you a draft to review before saving.

6.4 Campaign categories

Categories classify your campaigns and content, which is what keeps reporting legible once you have hundreds of them.

1. Go to **Campaign Categories** and create a category.
2. Enter the name and a description explaining when to use it.
3. Mark one as the **Default** so new content preselects it.
4. Save.

Three or four broad categories are usually enough — Newsletter, Promotional, Transactional, Event. Only one can be the default at a time.

7. Automate with journeys

Set this up when a single send is no longer enough and you want follow-ups that adapt to what people do.

7.1 Your first journey

A campaign is a sequence: an audience enters, content goes out, the journey waits, checks something, and branches. Everyone travels it individually.

You will need: a contact list, and at least one saved email. Two is better, so you have something different to send on each branch.

A good first journey is a welcome sequence:

1. Go to **Campaigns** and create a campaign.
2. Complete the settings: name, category, recipients, and campaign type. Choose **Scheduled** for a fixed timeline or **Dynamic** to run per contact from the moment they enter.
3. Start the canvas with **Audience** and choose your list.
4. Add an **Email** step and select your welcome email.
5. Add a **Wait** step — three days is a reasonable gap.
6. Add a **Decision** step to check whether they opened.
7. On the YES branch, add an email for engaged people. On the NO branch, add a different one — perhaps the same message with a new subject line.
8. Save the draft and correct anything reported.
9. Reopen and walk the whole journey to check it reads the way you intended.
10. When you are ready, open **Activate Campaign**, set your schedule, and activate.

Confirm it worked: open **Campaign Runtime Overview**. You should see contacts enrolled and moving. **Journey Progress** shows exactly where each person is.

Two things that help early on. A decision has two separate timers — how long to wait for an answer, and how long to wait afterwards on each branch. And the builder will not let you place two emails back to back without a wait or a branch between them, which stops anyone accidentally double-messaging an audience.

7.2 Universal triggers

A trigger is a standing rule that applies regardless of campaign — when this characteristic changes, do that. Use them for the things that should always happen.

1. Go to **Universal Triggers** and create a trigger.
2. Name it for what it does.
3. Choose the source — what the rule watches.
4. Complete the conditions.

5. Choose the target and what should happen.
6. Review the whole rule and save.
7. Move it to the Active panel when you want it live.

Confirm it worked: use **Show execution history** on the trigger to see it running. **Trigger Executions** shows the same detail across all your triggers, including whether each run actually changed anything.

Changing a trigger's source or target clears the dependent selections, so reselect them rather than assuming they carried across.

8. Add mobile messaging

Set this up when you want to send SMS, MMS or RCS alongside email.

8.1 What you get

Mobile messaging is an optional part of your plan. If it is included, it is **already set up** — the provider account, your sending numbers, the channels you have bought and the handling of inbound replies are all configured for you. There is nothing to connect and no credentials to enter.

How to tell you have it: **Mobile Messages** appears in your navigation, and a **Mobile Message** step is offered in the campaign builder alongside Email.

CHANNEL	WHAT IT SENDS
SMS	Plain text. The base channel.
MMS	Text with images or other media.
RCS	Rich cards with images and tappable buttons, on supported handsets.

The message builder shows the channels available to you. If one is missing, it is not part of your current plan — speak to your Indition account contact if you want to add it.

8.2 Your first message

1. Go to **Mobile Messages** and create a message.
2. Enter the name, category and message text.
3. Insert personalization from the picker.
4. For MMS, add your media. For RCS, add a rich card and any call-to-action buttons.
5. Check every preview tab, and watch the character and segment counts — segments affect what a send costs.
6. Save.
7. Send a test to your own number.

Confirm it worked: **Test Message Logs** shows the attempt and its outcome.

Once mobile is set up, a Mobile Message step becomes available in the journey builder alongside Email, so you can mix channels in one campaign.

9. Connect your website

Set this up when you want website behaviour to feed your audience, and you have developer time available.

9.1 What this gives you

CAPABILITY	WHAT IT DOES FOR YOU
Page and event tracking	See what people looked at, including after they clicked an email.
Known visitors	Connect browsing behaviour to a contact you already hold.
Website actions	Let a click on your site add someone to a list or campaign, with no export or import.
Contact forms	Turn a form submission into a contact automatically.
Email attribution	Connect website activity back to the campaign that sent them.

9.2 Turn on tracking

Do these in order — each step's result is the next one's starting point.

1. Go to **Tracking Settings**. Choose your collector domain from those offered, confirm the tracker is active, and decide whether page views should be recorded automatically. Agree the cookie scope with your developer.
2. Go to **Allowed Domains** and add every website that will send you data. Enter a hostname such as `example.com`, or a wildcard such as `*.example.com`, rather than a full page address.
3. Go to **Tracking Code** and copy the snippet generated for your account.
4. Give it to your developer to place once in your shared site layout, ideally just before the closing body tag.
5. Load a page on your site.

Confirm it worked: a page view appears in **Events** and matching activity appears in **Visitors**. That evidence — not the snippet being in place — is what tells you tracking is live.

9.3 Website actions

An action definition lets an interaction on your site change your audience directly — someone clicks "keep me posted about X" and they are on that list.

1. Go to **Action Definitions** and create an action.
2. Name it for the effect you want.
3. Choose the **Mutation Type** first — add or remove a campaign, a list, or an attribute.
4. Choose the target it applies to.
5. Save, then reopen and copy the generated **Action Key**.
6. Give the key to your developer along with when it should fire.

Confirm it worked: after a test on your site, **Action Executions** records the run, and the contact's membership reflects it.

The action key stays the same even if you later change what the action does, so review the pages using it before changing the target.

9.4 Contact forms

A contact form definition maps your website form's fields onto a contact record, and can run linked actions afterwards.

1. Go to **Contact Forms** and create a definition.
2. Map **Email** to the exact field name your website sends — ask your developer, because this is often not the label a visitor sees.
3. Map the other fields your form collects.
4. Add any linked actions whose effects you want, such as adding the person to a list.
5. Save and copy the generated **Form Key**.
6. Give your developer the key and the field names.

Confirm it worked: a test submission appears in **Contact Submissions**, and the contact exists with the values you mapped.

9.5 Keeping an eye on it

Tracking Health shows your tracking volumes alongside two useful counters: **Blocked Domains**, meaning a site tried to send data and is not on your allowed list, and **Invalid Tokens**. If either climbs, start there.

10. Protect your consent record

Worth reading once, early. There is nothing to configure.

Consent handling works from your first send without setup. Understanding where it lives makes the rest of the product easier to reason about.

SCREEN	WHAT IT HOLDS
Email Suppressions	Every address currently blocked, and why — an unsubscribe, a bounce, or a manual block. Blocked addresses are skipped automatically on every send.
Messaging Suppressions	The same for phone numbers.
Unsubscribe Events	Each unsubscribe, with the campaign and email it came from.
Unsubscribe Feedback	The reason and any comment the person left.

What to know

- **Consent is held per address, not per person.** Someone can be subscribed on one address and unsubscribed on another, and the product respects each independently.
- **Suppression is automatic.** You do not have to maintain a do-not-contact list; it maintains itself.
- **Lifting a block is deliberate and recorded.** Unsubscribes and manual blocks are lifted with one control, bounces with another that asks for a note. The history is kept either way, which is what makes the record defensible.
- **Lifting one reason does not lift others.** If an address is blocked for two reasons, clearing one leaves the other in place.
- **Only lift an unsubscribe with a genuine reason,** such as the person asking to resubscribe.

When someone asks why a contact did not receive something, Email Suppressions is almost always the answer.

11. Setup checklist

Use this to track where you are. Only the first group is required.

To start sending

☐	TASK	SECTION
☐	Signed in to the right app	1.2
☐	Looked at contacts, lists, emails and deliveries	1.3
☐	Imported your contacts	2.1
☐	Built your first list	2.2
☐	Prepared and previewed an email	2.3
☐	Sent your first campaign	2.4
☐	Reviewed the results	2.5

First week

☐	TASK	SECTION
☐	Agreed naming conventions	3.1
☐	Built your brand kit	4.1
☐	Agreed your custom field variable names	5.1
☐	Created your campaign categories	6.4
☐	Read how consent is handled	10

When you need it

□	TASK	SECTION
□	Email template for your recurring sends	4.2
□	Contact custom fields created	5.1
□	Site-wide values set up	5.2
□	Attributes and groups for segmentation	6.1
□	Smart Views for recurring questions	6.3
□	First automated journey live	7.1
□	Universal triggers configured	7.2
□	Mobile provider connected	8.1
□	Website tracking installed and confirmed	9.2
□	Website actions and contact forms live	9.3, 9.4

Where to go next

The **User Manual** covers every feature and every operation in detail, organised by what you are doing rather than by setup order. The **FAQ and Troubleshooting** guide answers the questions that come up most often. If you need help, your support contact will want to know which screen you were on, what you were trying to do, and the exact message you saw.