



## Automated Quote Follow-Up Email with NetSuite

**Introduction:** iClick is the leading supplier of custom USB drives and drive duplication services in the ad specialties market. With large inventories, integrated production facilities, and proprietary manufacturing, packaging, and data loading equipment, iClick is able to quickly respond to customer orders with high quality results and excellent customer service.

**Background:** Utilizing NetSuite to manage their sales process, iClick maintains a consistent quote cycle and flexible pricing structure. At scheduled intervals, quotes older than a specified age are closed. The company wanted a way to automatically follow-up with any lead for whom a quote was created but not processed. Brand and image are very important to iClick, so they wanted to ensure that they maintained control over the message sent with regard to the "Sender", and email content, and the overall look and feel of the email. In addition, iClick wanted to include a PDF attachment of the Quote with the email. While NetSuite allows users to do parts of this solution individually, there was not a built-in solution that would provide all of the requested functionality.

**Solution:** Explore Consulting worked with iClick to build a solution that met all of the company's business requirements, and was flexible to ensure it will accommodate future unanticipated needs.

The solution developed by Explore has three parts: a script that uses NetSuite APIs to generate a custom PDF and store the file in the File Cabinet; a custom "configuration" record in NetSuite to allow user-configuration of the "who, when, and what" for emails; and a scheduled script which leverages the

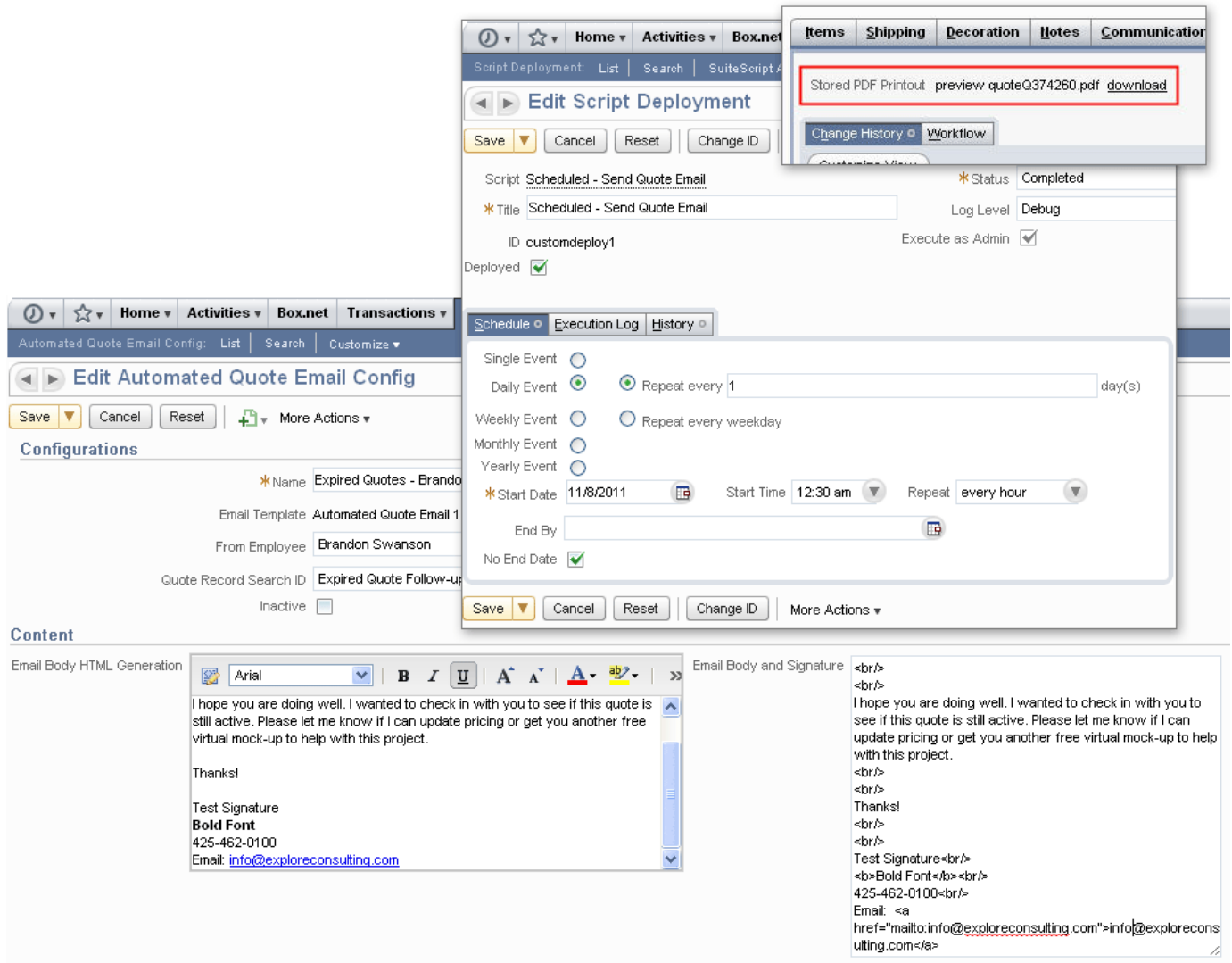
configuration record details to generate an email, attach the stored PDF quote, and send the full communication to the Lead.

iClick's business requirement required a PDF document to be attached to the email. In this way, the email message, sender, subject, signature, etc. can be customized and managed by the marketing users, and the PDF attachment (with the specific quote number) could be managed separately. On any "save" event on a quote, the first script compiles details from the record and generates a PDF to match the format of the preferred PDF layout. This PDF file is stored in the file cabinet, and the resulting document is linked to the quote record through a custom "Document" type transaction body field. Any time the quote is modified, the PDF is re-created, and the new version automatically replaces the old version, resulting in an "always up to date" document.

To allow maximum user-configuration, the "who," "what," and "when" of the action are configurable by the user. The list of records to be acted upon (ie: those prospects with expired quotes, in this case) is defined by a saved search, and is thus 100% user configurable. This is combined with a "configuration" record. This custom record allows the user to indicate (i) who the email will come from, (ii) the search to be used, and (iii) the content of that email including HTML formatting. Using this model, multiple configuration records can be created, accommodating many different scenarios, including different searches, employees from whom the email is sent, and email content. The scheduled script handles the rest.

Finally, a scheduled script is used to perform the merge-and-send operation at the desired interval—again, configurable by the user. The scheduled script searches for any active configuration records. Beginning with the first record, the script loads the search, merges content from the quote and customer into the user-defined email, attaches the quote PDF

file, sends the email, and updates to quote to indicate it is complete. This process is repeated for every quote in the search results, and for every configuration record created by the user, until all records have been processed. For large volumes of records, the script will automatically reschedule itself until processing is complete, allowing for very high throughput.



**Results:** As a result of this solution, iClick is able to automatically follow-up with prospects to ensure the highest possible chance of closing business based on quotes- even quotes that would have otherwise simply expired. The solution is easily configurable to allow

business users to define the details of how it works without involving a developer for the every-day changes that might occur. The solution provides iClick with an automated tool for capturing business that might otherwise have gone unrealized.

## About Explore Consulting

Based in Bellevue, Washington, Explore Consulting was founded in 2001 and is a professional services company dedicated to providing innovative and cost-effective solutions for their customers' database and IT systems needs. Having specialized in SaaS solutions for more than 10 years, Explore Consulting is the largest and most experienced NetSuite reseller and solution provider in the Northwestern United States. Whether you are looking for assistance with your NetSuite purchase and implementation or needing to integrate your NetSuite account to an external data

source, Explore is your one stop NetSuite service provider. Explore Consulting is well-known as a leader in NetSuite customization, integration and extensibility, and was recently included on the Inc. 5000 list of fastest growing privately owned companies in the U.S. for the fourth year in a row as well as the Puget Sound Business Journal's 100 Fastest Growing Private Companies. Explore has also been a 6-time NetSuite Star Performer and was recently named as 2011 NetSuite Partner of the Year, Americas. For more information, visit [www.exploreconsulting.com](http://www.exploreconsulting.com).