



## Automated Recurring Orders in NetSuite

**Background:** 1800Healthy sells vitamins and nutritional supplements through multiple channels-including their 1800healthy.com website. Customers can read information about the health benefits of a variety of vitamins and nutritional supplements, and purchase those products through the 1800Healthy.com website for either a one-time purchase or- for a discount- can sign up to receive the product on an ongoing basis. 1800Healthy refers to these ongoing orders as their RefillRewards program.

**Issue:** The RefillRewards program is based on the idea that each product ships with a supply that should last for a specific amount of time (ie: 30 days). As that day approaches, 1800Healthy needed NetSuite to automatically queue up the next order for shipment. However, a number of factors prevented the standard memorized transactions from being a sufficient solution: the shipping interval, next order date, product, and product rate could all change between shipments. In addition, the users would need a way to easily see the history of orders and forecast the future of orders related to these RefillReward schedules. The company also required additional validation to occur at multiple steps in the process, as well as when users manually updated the details of a schedule.

**Solution:** Explore Consulting worked with 1800Healthy to develop a combination of client-side, userEvent, and scheduled SuiteScripts to automatically manage the RefillRewards program. When an order is created through the web store, a script detects any RefillReward items included on the order and, if any are present, creates corresponding RefillReward schedules for those items using details from the Item record and the Sales Order. Upon fulfillment, these records are updated to recalculate the next shipment date, inventory forecasting values out to three years for this schedule, and queue the schedule for the next order creation. Finally, a scheduled script executes

multiple times a day against all RefillReward records with an order scheduled to ship within a defined window. The script automatically creates the recurring sales order using the details from the RefillReward schedule; if multiple orders are scheduled for the same day for a customer, the script consolidates those onto a single order to save on shipping costs.

The screenshot shows the Vitalive product page. At the top, there's a 'SHARE' button and a 'Product Rating' section with 4 stars and '(34 Ratings)'. Below that, the product description states '100+ Anti-Aging Nutrients in One Supplement...' and lists benefits like 'Provides the antioxidant power of 35 servings of fruits and veggies.' The page is divided into two main sections: 'Step 1 - Select Quantity' and 'Savings Calculator'. 'Step 1' offers three options: 30-Day Supply for \$59.99, 90-Day Supply for \$179.97 (Buy 2, Get 1 FREE! Save 33%), and 180-Day Supply for \$179.97 (Buy 3, Get 3 FREE! Save 50%). The 'Savings Calculator' shows a price before discounts of \$359.94, a quantity discount of \$179.97, and a Refill Rewards discount of \$18.00, resulting in a subtotal of \$161.97 and a final 'Your Price' of \$161.97 (55% savings). Below this, 'Step 2 - Select Replenishment Option' is highlighted with a red circle. It features a checked checkbox for 'Make replenishment easy with auto Refill Rewards.' and a 'Save an extra 10% now.' offer. The 'Refill Rewards' logo is also visible. At the bottom, there are buttons for 'Add to Cart', 'Fast & FREE Shipping' (In-Stock & Delivered in 3 Days), and '365-Day Returns'.

**Figure 1: Refill Rewards option in NetSuite web store**

Validation was included in the script to allow multiple credit card authorization attempts if the initial authorization fails, including the ability to automatically update the RefillReward status to suspended, and to write the authorization failure details to a user note on the RefillReward record. The successfully created recurring order flows through the standard fulfillment process, updating the RefillReward record(s) to be ready for the next iteration of the cycle based on the shipping frequency for the items ordered. At any point in the cycle, customer service can

manually update the RefillReward schedules to move ship dates, change frequency, or update the rates for a customer. Client-side scripting is used to validate

the inputs to ensure an order can't be scheduled for a date in the past or set in any other way that would result in an order being accidentally skipped.

The screenshot displays the NetSuite interface for the RefillRewards module. The top navigation bar includes 'Home', 'Activities', 'Transactions', 'Lists', 'Reports', 'Documents', 'Setup', and 'Support'. The current page is titled 'RefillRewards' and shows details for a specific order (RR-SO-500297-1). The 'Order Forecasting Fields' section is highlighted, showing a table of future shipment dates and quantities. The table includes columns for shipment dates from 9/11/2010 to 2/12/2013 and a constant quantity of 1.02. Below the table, it indicates 'Num. of Shipments in next 180 Days' and 'Expected Qty in Next 180 Days' both as 1.02.

Next Ship Date	Quantity
9/11/2010	1.02
2nd Ship Date 3/7/2011	1.02
3rd Ship Date 8/31/2011	1.02
4th Ship Date 2/24/2012	1.02
5th Ship Date 8/19/2012	1.02
6th Ship Date 2/12/2013	1.02

**Figure 2: Order Forecasting for RefillRewards in NetSuite**

Results: 1800Healthy now has a fully automated system for managing a high-volume segment of their business without the need for additional staffing overhead. The automation and validation ensure the schedules are created, updated, and used to create recurring orders reliably according to the schedules outlined for each customer. With this automation in place, 1800Healthy can shift their focus from the logistics of creating and fulfilling orders to sales and marketing efforts used to drive additional traffic to their site.

### 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 8 years, Explore Consulting is the largest and most experienced NetSuite reseller and

solution provider in the Northwestern United States. Not only is Explore a licensed reseller of the NetSuite product suite, but an experienced NetSuite implementation and integration partner. Whether you are looking for assistance with your NetSuite purchase and implementation or needing to integrate your NetSuite account to any external data source with our industry-leading CloudConnect™ service, we are your one stop NetSuite service provider. Explore Consulting is well-known as a leader in NetSuite customization, integration and extensibility. While NetSuite can run most businesses using out-of-the-box functionality, we're experts on adapting the product to meet your specific business requirements. Explore Consulting was recently included on the Inc. 5000 list of fastest growing privately owned companies in the U.S. for the third year in a row as well as the Puget Sound Business Journal's 100 Fastest Growing Private Companies. Explore has also been a 5-time NetSuite Star Performer and is well recognized as a leader in integration and mobile solutions for NetSuite. For more information, visit [www.exploreconsulting.com](http://www.exploreconsulting.com).