



NetSuite Renewal Reminder Email Solution

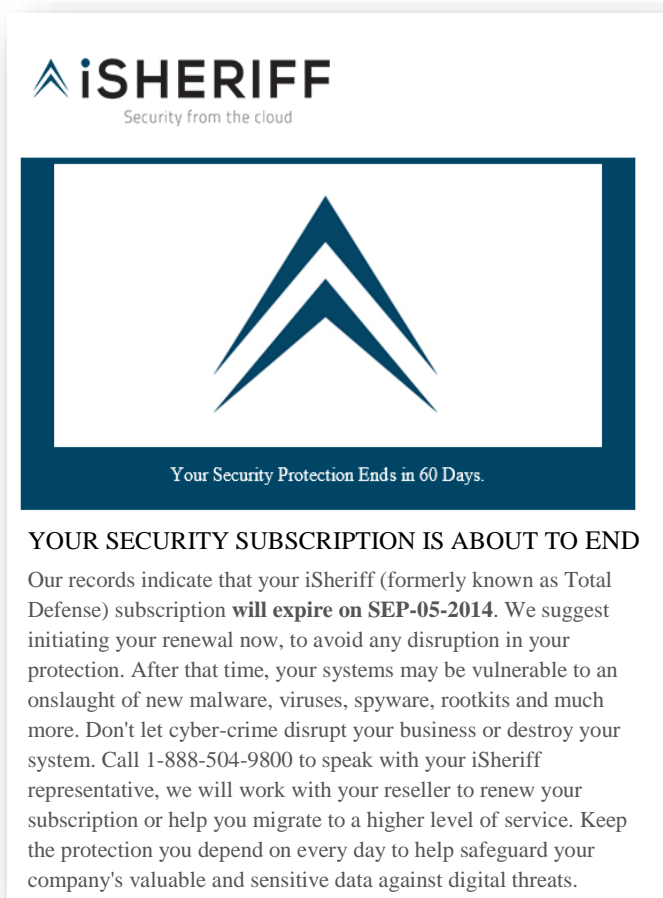
“Explore has the experience and trained resources readily available to respond and resolve unforeseen issues quickly. Their cross-trained NetSuite consultants have the ability to provide support across the various facets of our organization which allows us to stay focused on our core business, enhancing our overall NetSuite experience. Keep up the excellent work Explore Consulting.”

- Derek Nelson, VP of Finance/Controller, iSheriff

Background: [iSheriff](#) is the leading provider of content and endpoint security from the cloud. They keep organizations and individuals safe from cybercrime, malware and digital threats. Thousands of businesses across a wide array of industries have deployed their solutions, including some of the most sophisticated buyers of security technology worldwide. iSheriff has operations in New York, California, Ireland and Asia.

Issue: iSheriff has been using NetSuite ERP since 2011, but was still using a separate CRM, Web-Infinity. They were paying for an additional customer management system instead of utilizing NetSuite’s built-in CRM capabilities. The two systems were not integrated and therefore iSheriff had to manually manage the data between them. A large volume of iSheriff’s business is based on renewals and because of this it is very important to efficiently manage renewal dates and the customer’s install base. The customer install base is one area that had limited visibility due to information being spread across two systems since the CRM system stores the renewal opportunity but NetSuite stores the orders. Therefore, when a customer did renew, the renewal purchase would be captured in NetSuite, and the renewal opportunity had to be manually closed in the separate CRM system or it would still appear that the client was needing to renew, and they would potentially receive additional unnecessary renewal reminders.

Solution: iSheriff chose [Explore Consulting](#) as their NetSuite Partner in 2011 and they have continued to



work with them since. In May of 2014 Explore migrated their CRM data into NetSuite and developed an automated email reminder solution to help iSheriff more efficiently capture all of their renewal business. Explore implemented NetSuite’s contract renewals

module that would create a NetSuite renewal opportunity based off of the original sales order. This tracks important contract information such as the expiration date, the terms (1 year, 3 year, 5 year, etc.), the original order information, and the products. Custom mail templates were created for all of the following intervals: 90 days before expiration date, 60 days before expiration date, 30 days before expiration date, on expiration date, and 2 days after expiration date. Explore's developers then created a script that would run on a nightly basis and identify all of the renewal opportunities that were still open, active and at one of the defined intervals. An email is then automatically sent to all of the contacts associated with the end user to alert them that their security subscription is coming to an end. The email is customized based on the interval and the language of

the person receiving the email and includes the original order information and security products that are due to expire

Results: The implementation of the reminder email automation drastically reduced the amount of time and errors caused by the manual nature of the prior process. The iSheriff employees can now depend on the reliable nature of an automated process. iSheriff clients are no longer receiving unnecessary renewal reminders, because when they renew the opportunity is automatically closed in NetSuite when they purchase. iSheriff employees can also now enjoy the simplicity and visibility of only using one system for both their enterprise resource planning (ERP) and their customer relationship management (CRM).

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 cloud-based solutions for more than 13 years, Explore Consulting is the largest and most experienced NetSuite reseller and solution provider in the Northwestern United States.

Explore Consulting is well-known as a leader in NetSuite implementation, customization, integration and eCommerce, and has also been a 9-time NetSuite Star Performer, won 22 NetSuite awards, and was recently named as 2014 NetSuite Partner of the Year, Americas. For more information, visit www.exploreconsulting.com