exigo

Backup or Insurance Autoships

v 1.0

Backup or Insurance Autoships

We have two process types for a recurring order template. **Always Ship** is a process type that most clients use. There is a process type called **Backup** which can be used in conjunction with a volume bucket.

Let's say for example that you have a requirement in your commissions that says if the distributor has 100 personal volume from an autoship or they have 150 volume from their personally enrolled customers and their own orders for the month, then they qualify. That means, I can have either 100 Autoship PV or 150 PV.

If I want to wait for the whole month to see if I can qualify with my customer's volume, then I would want my autoship to run on the last day of the month. I would set my process type to Backup and then the process day would be the 30th of the month.

There would be a true/false volume bucket that was programmed that will be set to true if the 150PV requirement was met. It will be set to false if I did not meet the 150PV requirement and it is necessary to run the autoship.

The autoship process that runs to generate the order will see that the process type is backup. It will then look at the volume bucket defined for true/false to see if it is necessary to process. If I met the volume requirements with my personal volume of 150, it will not generate an order. If I did not meet the requirements, then it would generate an order.

In order to implement a program similar to this, you would have to consider the following:

1. Define what your requirements are and determine the rules for whether an autoship should be generated or not. A commission programmer would need to program the True/False volume bucket that is configured for the Backup process type.
2. You will have to manually release your autoships each month so they do not process on the wrong day.

   For example, if I have an autoship scheduled to process on the 10th of each month, but I do not collect my volumes until the last week of the month, you should not process the autoship until the last day (anywhere between the 25th and 30th) of the month. We would hold the process that runs daily and releases the CC pending and ACH pending orders and let you release them when you are ready using a Process Auto Orders feature.

3. You will need to modify your website for autoship enrollment and autoship modification to allow for the selection of the process type.
4. You will have to decide if any mass updates or changes are needed to your existing distributors who are currently on autoship.