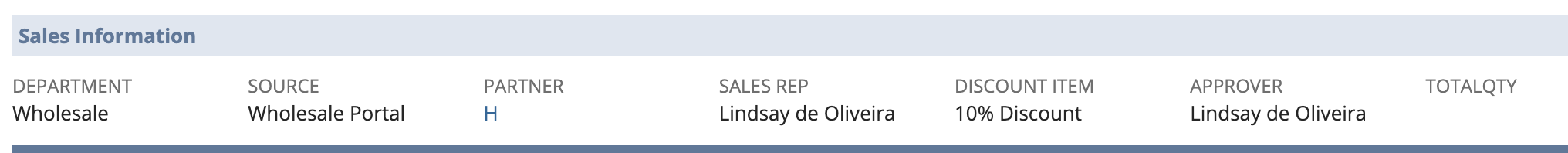
My Swedish Treasures has a process where they assign customer accounts to Rep Groups and Sales Reps. These are tracked on sales orders and invoices so that commissions can be paid. The Rep Group is identified in the Partner field and the Sales Rep is identified in the Sales Rep field.



There will be a ‘checkbox’ on the customer record titled ‘Make House Account’.

There will be a ‘counter’ field on the customer record titled ‘Consecutive Orders’ that can be incremented by 1 and will start at 0.

Here is the logic.

If a sales order is received and the Partner field does NOT equal H AND the Source value on the order is any of Direct, Wholesale Portal, Faire or Tundra then increment the Consecutive Orders value on the customer record by 1 (example: If it was at 0, then update it to 1. If it was at 2, then update it to 3). This can be a scheduled script that can run during off hours.

Have a second script that checks for the value in the Consecutive Orders field and if the value equals 3 or higher, update the Make House Account checkbox to True. (Note: It is ok if the consecutive orders value is incremented higher than 3, which could happen based on timing of them updating the customer record to a house account).

Example: Customer is Mike Williams. The current Partner on the customer record does NOT equal H. The last three orders received had the Source field populated with Faire, Direct, Faire. Increment the Consecutive Orders field by 1.

Example 2: Customer is Mike Williams. The current Partner on the customer records does NOT equal H. The last three orders received had the Source field populated with Faire, Webstore, Direct. Set the Consecutive Orders value to 0.

The Source values are contained in a custom list titled Sales Sources (customlist\_source).

The values to look for, along with ID’s, are:

Direct: ID value is 2

Wholesale Portal: ID value is 19

Faire: ID value is 16

Tundra: ID value is 8

The Partner values are contained in a standard NetSuite list and can be found by going to Lists > Relationships > Reps. The partner value of H has an ID of 11591.