MDS Quick Guide – Recurring Web Orders

V 1.1 updated 04/06/21.

Overview:

This quick guide will walk you through the basic steps of setting up recurring/automated/memorized orders. This process offers a simple and easy way to get your customers on a regular ordering pattern and build predictable purchasing models.

For the purposes of this quick guide, we will assume you have your customers, and products setup in your MDS system.

To create new recurring orders, add items to your order and choose to save as recurring order at check out. Once created you can choose the frequency and next ship date from this screen.

Note: You can choose the start date and each subsequent order will follow your schedule. Once the Order ships the Next Ship Date will automatically update and display.

To complete a recurring order, and stop it from creating new shipments, simply click the complete flag below.

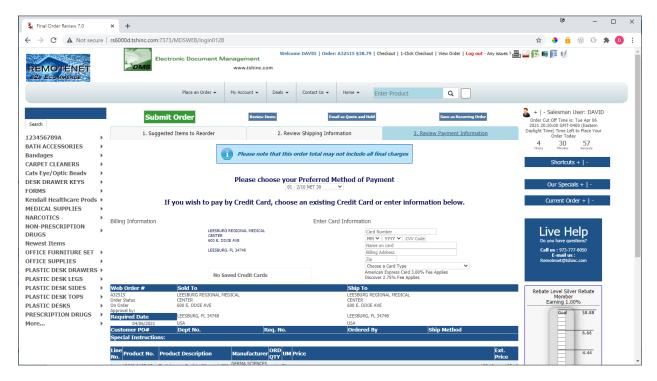
To add or remove items to an existing order, create a new order and complete the old one.

To view the details of your recurring order, click on the +/- next to the Recurring ID.

Once your order is created if you want to have a confirmation of the new order emailed to the customer you can setup in the customer master file, and or once it ships you can have it send a copy of the packing slip/invoice.

Step 1. Creating your Recurring Web Order.

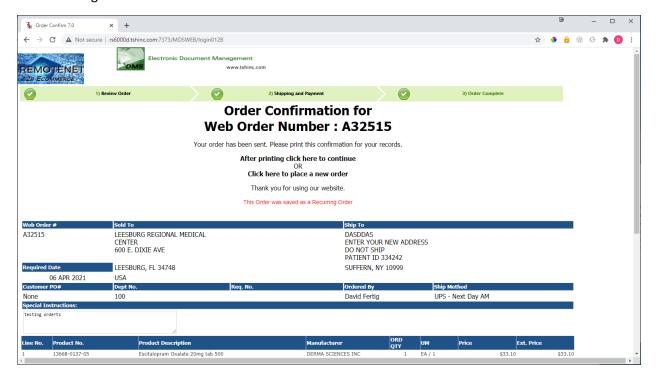
Create a Web order using any of the standard methods and go to the checkout screen.



You will see a new button called save as recurring order.

(top right in this picture)

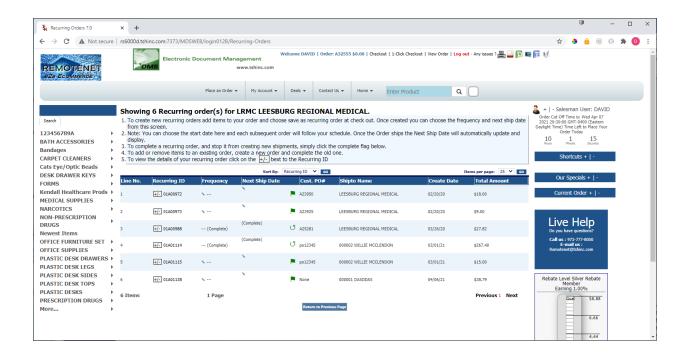
Once you place your order a note will show advising you it was not processed as a shipment but saved as a recurring order



Step 2. Modifying or Updating your Orders

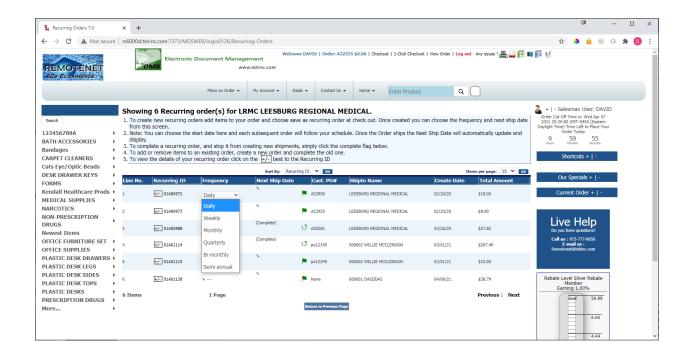
To modify an existing order items, you can complete the existing order and create a new one from it then add or remove items from the cart, then save as a new recurring order.

To update the frequency of when the order ships login to the website and go to Recurring Orders.



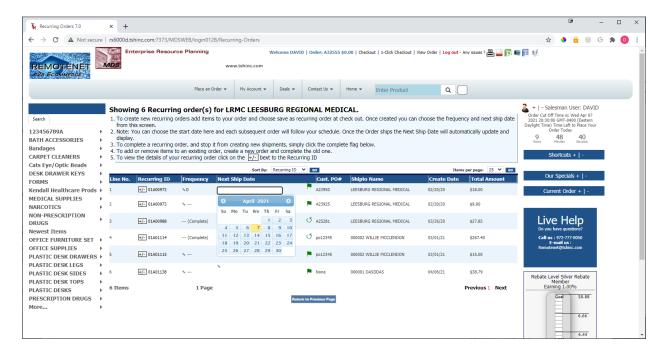
Note: You can choose the start date here and each subsequent order will follow your schedule. Once the Order ships the Next Ship Date will automatically update and display. (it does not current refresh the screen when you change it so that you can update multiple orders.

Click on the frequency to change the shipping schedule -



Options allow for Daily/Weekly/Quarterly/Bi-Monthly/Semi-Annual

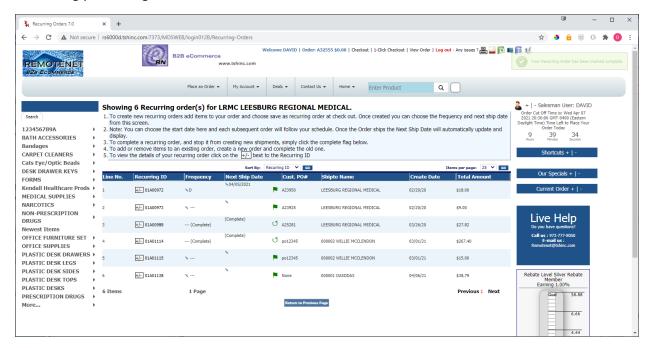
Bimonthly would be twice a month, and Semi Annual is Twice a year (every 6 months)



To update the date, click on the date field and use the date select drop down to choose your next date.

Or enter your date manually in the format MM/DD/YYYY

To complete a recurring order, and stop it from creating new shipments, simply click the complete flag next to the ship date if it is Green, it means it is still active. Once you click it will change the data and frequency to say complete and move the order to history, you can always move it back and update the dates and frequency. — once you update a status message will appear at the top of the screen confirming your changes.



To view the details of your recurring order, click on the +/- next to the Recurring ID.

