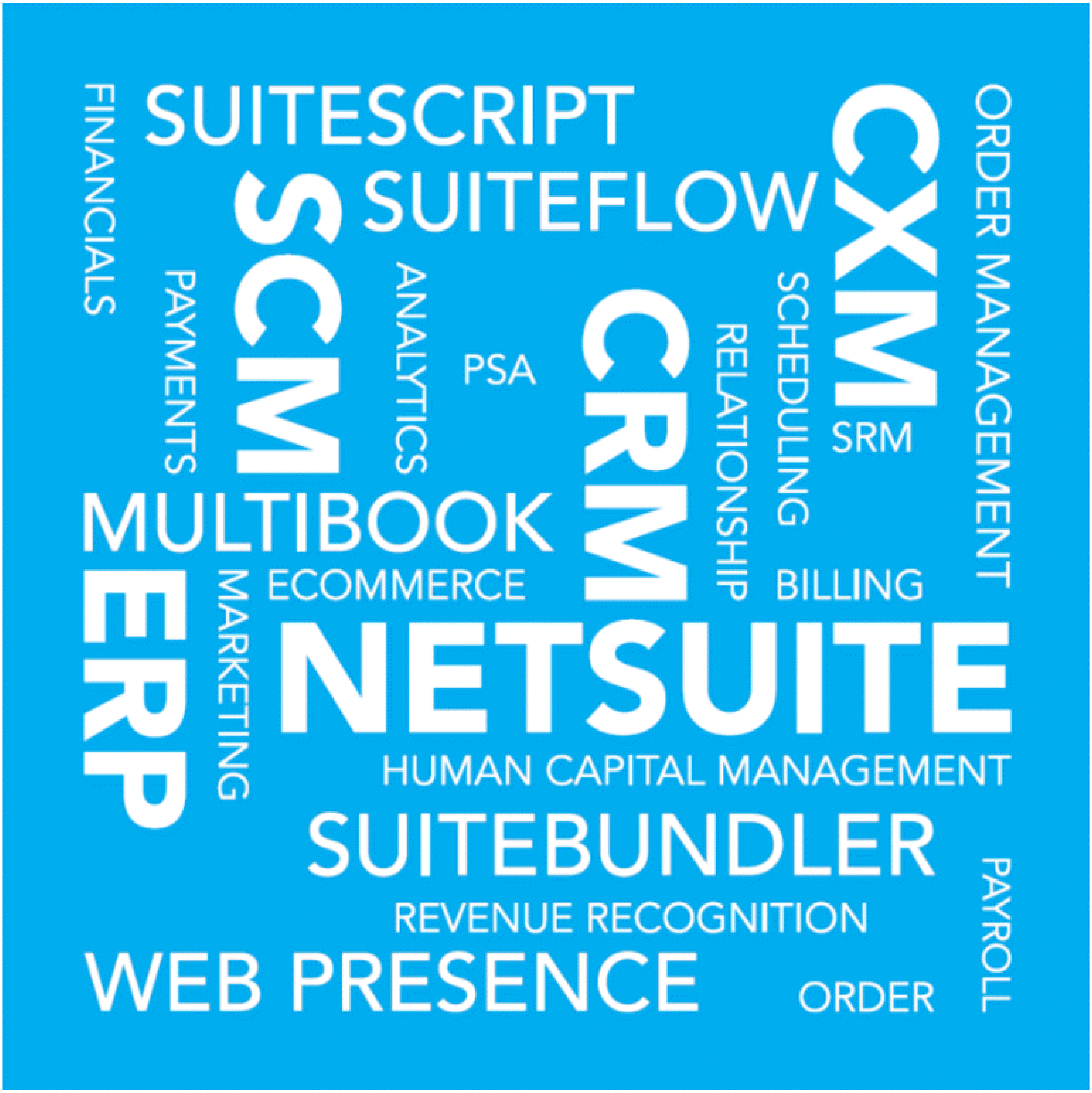
Marketing Automation



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Marketing Automation Overview

The ability to bring in new leads and to extend offers to existing customers is essential to any business. With NetSuite's marketing tools, your marketing department can manage lead generation and campaigns efficiently and effectively.

NetSuite combines all the tools you need to manage your marketing efforts in one integrated system. You can:

- Manage leads generated through custom online lead capture forms and imported lists.
- Create customized templates to generate marketing email.
- Schedule and manage multi-channel marketing campaigns.
- Use the Upsell Manager to determine which customers provide good selling opportunities.
- Track the search engine keywords that bring customers to your Web site.
- View reports and key performance indicators (KPIs) that give you the real-time information you need to make informed decisions.

This manual leads you through the steps to take in managing your marketing efforts with NetSuite. You can manage lead generation, set up and execute marketing campaigns, and get the information you need from reports and other sources.

> **Note:** The steps in this guide provide navigation for users logged in with the Marketing Administrator, Marketing Manager, and Marketing Assistant roles.

Examples in this guide refer to a fictional retail company called Wolfe Electronics. These examples are highlighted in blue.

Lead Capture

NetSuite is equipped to handle a variety of lead generation procedures. You can import lists of leads using CSV or XML files or enter records manually. You can also capture leads using online customer forms.

Online customer forms are customizable entry forms that create new lead, prospect or customer records when they are submitted. You can choose which information you want to capture for each lead and customize the look and feel of the form.

Additionally, you can determine what NetSuite does with the information you gather. You can choose the kind of record created–lead, prospect or customer–when the form is submitted and designate which URL the lead is taken to after submitting the form.

Avoiding the creation of duplicate lead records is vital in ensuring that lead generation is tracked accurately. To avoid creating multiple records for the same lead, you can choose to update existing records instead of creating new ones. To do this, select a field you want NetSuite to search for. When the information in this field matches an existing record, that record is updated with the information entered on the form.

> For example, the Wolfe Electronics marketing manager creates an online lead form that has fields for Company Name, Email Address, and State. The manager sets the Email Address field to search for matching records. If the email address entered matches the email address on an existing record, the existing record is updated instead of a new record being created.

Each lead is assigned a lead source that indicates which campaign generated the lead. Maintaining this lead source information enables you to tie revenue to campaigns and to use lead source analysis to see which campaigns are producing the most leads.

For more information on lead generation, see Capturing Leads.

Running Campaigns

Managing marketing campaigns has never been easier. With a few basic steps, you can create and execute campaigns that give you maximum visibility into the impact each campaign has on your business. NetSuite's reports and KPIs provide a comprehensive look into your marketing campaigns.

You can effectively track lead source data, return on investment (ROI) and campaign response for entire campaigns as well as individual campaign events. For more information on how to set up your campaigns to maximize your visibility into these key marketing metrics and for tips on carrying out different kinds of campaigns, see the help topic Campaign Overview. See also Managing Campaigns.

Email Campaigns

Campaign email is generated by NetSuite using templates that you can create and customize. CRMSDK tags enable you to include information that is personalized to each recipient. Also, NetSuite automates tracking ROI, lead source and campaign response for email campaign events. For more information on email campaigns, see Email Marketing Campaigns.

Paid Keywords

If you purchase keywords from Internet search engines such as Google Adwords and Yahoo Sponsored Search, you can use keyword campaigns to determine how customers find your Web site.

The revenue generated by paid keywords is tracked through the Lead Source field on sales transactions, permitting you to calculate return on investment (ROI).

Keyword campaigns track the paid keywords, search engines, target audience, and the URL associated with the keyword search results. For more information on how to manage your paid search keywords, see Paid Search Marketing.

Upselling

The Upsell Manager enables you to identify customers who provide a good opportunity for upsell.

By measuring the correlation between the items that customers purchase, the Upsell Manager presents a list of customers along with an item or set of items they might be willing to buy.

For more information, see Upsell Manager.

Campaign Analysis

NetSuite includes a full set of standard marketing reports, such as the Campaign ROI and Campaign Response reports. You can customize reports to meet the needs of your business. For example, you can add columns of data or display a report as a bar graph or pie chart.

Key performance indicators (KPIs) provide an immediate updates on your campaigns when you first log in to your NetSuite account. You can view your data in real time as orders are received or as campaign email is viewed.

In addition to reports, you can use NetSuite's search tools to create reports of your own design. You can show the results of searches on your Dashboard or add links to search results.

For more information, see the help topic Marketing Reports.

Capturing Leads

NetSuite provides all of the tools you need to manage the generation of new leads. In this section, you can learn how to create online customer forms and how to manage lead source information.

Lead Sources

Lead sources define how new leads come to your company. If you use the Marketing Automation feature, the list of possible lead sources matches the titles of your marketing campaigns. Marketing. For more information on this feature, see the help topic Campaign Overview.

Lead source is set in the Lead Source field on lead, prospect, customer, and contact records.

If you create a campaign email message with a link to an online lead capture form, be sure to pass the lead source in the URL so the new lead is properly attributed to the lead source. For more information on passing parameters in URLs, read Passing Parameters Through URLs.

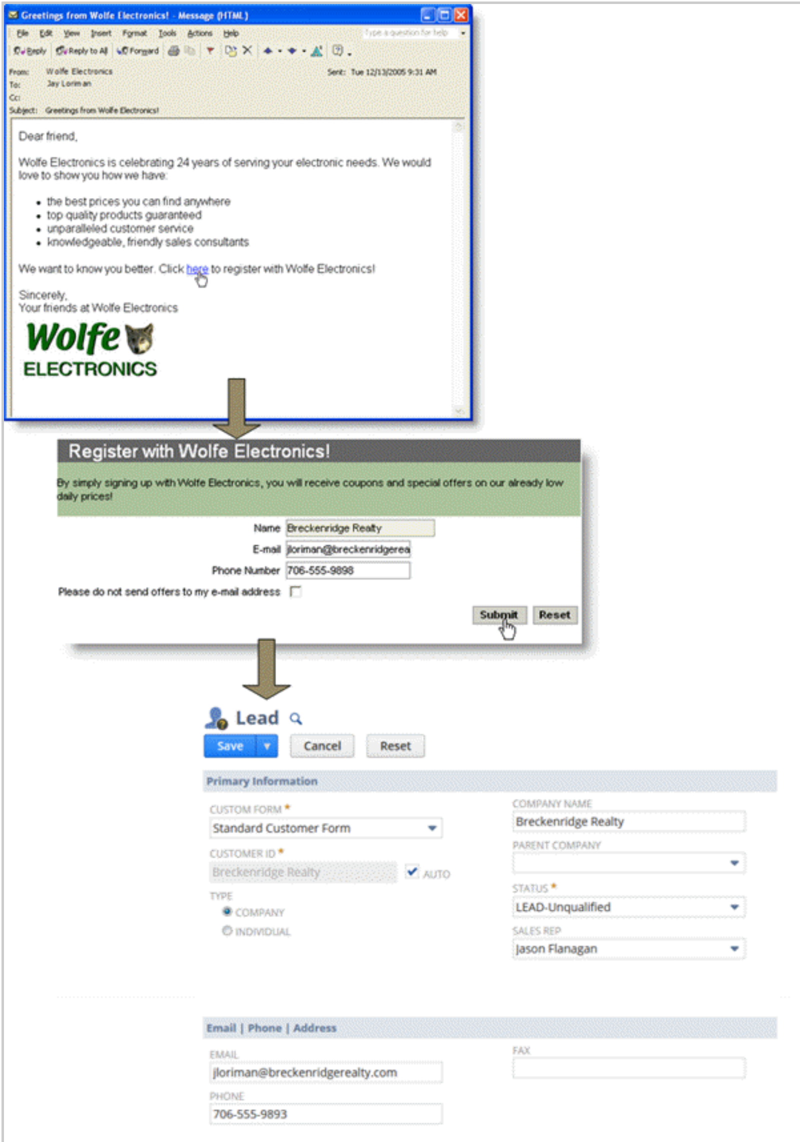
If you import a list of leads via smbXML or CSV import, you can include the lead source in the imported file to indicate where these leads came from.

For letter campaigns and other campaign channels, you can manually track which campaign brought a customer to your company by selecting the lead source on the customer record.

Creating Online Customer Forms

Online customer forms are used to create lead records in your NetSuite account. You can link to online forms from your Website, from partner sites, or through campaign email. When a lead submits an online customer form, a new lead record is created.

By using online customer forms in conjunction with your marketing campaigns, you can effectively capture new lead information and report on the effectiveness of campaigns.



To create an online lead capture form:

1. Go to Setup > Sales & Marketing Automation > Online Customer Forms > New.
2. Click Default Form Template.
3. Enter a title and message on the form.
4. On the **Select Fields** subtab, select a field you want to appear on the form.

   > **Note:** Be sure to include the fields that will enable you to contact the lead in the future. For example, Email Address is a field that would appear on most lead capture forms.

   Including **Company Name, First Name** and **Last Name** fields lets you capture information on both individual and companies.
5. Click **Add**.
6. Repeat these steps for each field you want to appear on the form.
7. Click **Save**.

Now, you can link to this form from your website or place it in a marketing email message.

If this online form is used for a single campaign, you can set the lead source that is associated with the records created from the form. To do this, click the **Set Up Workflow** subtab. Select the campaign in the **Set Lead Source** field.

If you check the **Allow Update** box next to the **Set Lead Source** field, existing customers that submit this form are assigned the lead source in the **Set Lead Source** field. Clear this box if you only want to assign this lead source to the following:

- New records
- Records that do not already have a lead source

Passing Parameters Through URLs

You can use parameters to pass information through the links to your online customer forms. For example, if you link from partner websites, you can include the partner's name or code in the URL so you know the source of the new lead or customer. You can also use parameters when creating links for paid search campaigns.

When a customer follows a link to an online customer form and submits the form, a new lead, prospect, or customer record is created. If you include parameters in the link to the form, this information is included on the new record. Parameters in the link to the form lets you associate this new record with a campaign or partner, for example.

> Wolfe Electronics advertises through banner ads on the internet. Each ad links to an online customer form from their websites. The marketing manager wants to track which ad campaign sends each lead to the form.
>
> The campaign ID for each ad is passed through the link to the online form. When the lead submits Wolfe Electronics' lead capture form, the campaign is automatically selected on the lead record that is created.

A form's URL can be found on the External subtab of the online customer form record in the Publishable Form URL field.

To pass information through a link, you add the information to the end of the publishable form URL. In the example above, the URL might look like this:

```
https://system.netsuite.com/app/site/crm/externalleadpage.nl?compid=ACCT000000&formid=1&h=1bdc8
0a058&leadsource=JoinNowAd
```

In this sample URL, notice that the first parameter in a URL begins with a question mark (?). Each parameter after the first begins with an ampersand (&). Most URLs include parameters by default. In this example, there are parameters referring to the NetSuite company ID, and the online form's ID.

Note: Spaces in parameters should be replaced with **%20**.

The table below lists the parameters you can use to automatically insert information into an online customer form.

Field	Parameter
Campaign Event***	&campaignevent=187
Company Name	&companyname=Global%20Distributing,%20Inc.
City	&city=New%20York

Field	Parameter
Country	&country=USA
Custom Form	&customform=New%20Lead%20Form
E-mail	&email=john@email.com
Lead Source	&leadsource=Spring%20Ad%20Campaign
Login Password	&password=password
Partner**	&partner=Universal%20Consulting
Partner Code**	&partner=1111
Phone Number	&phone=555-555-5554
Promotion	&promocode=Feb%20Flyer
State	&state=New%20York
Zip/Postal Code	&zip=54321

* The **&customform** parameter determines which lead, prospect, or customer entry form is used when editing or viewing the record you create.

The **&partner parameter is used to pass both partner names and partner codes.

***The **&campaignevent** parameter determines which event is associated to the customer entry form. The value of this parameter is the internal ID of the campaign event.

If a partner's site links to your online customer form, you might want the partner field to show the name of the partner. To do this you would create a link to the URL that would look like this:

```
https://sample.online.customer.form.com?partner=Partner%20Name
```

When a lead clicks the link to your online customer form on the partner's web page, the lead is taken to your online customer form and the Partner field has the partner's name automatically entered.

If you link to online customer forms within your NetSuite implementation, you can pass information into custom fields about the person navigating to the form. For example, you could pass this information when linking to a custom record form from your Customer Center.

Info	Parameter
name	{name}
login email address	{email}
first name	{firstname}
last name	{lastname}
internal ID	{user}
internal ID of user's role	{role}

Custom Field Parameters

You can create custom entity fields that you can use to track information that is specific to your business. Custom entity fields can be included in online customer forms.

A marketing manager creates a custom check box field called **Product Trial Candidate** that is used to indicate leads that are willing to test new products. When a lead clicks the link to "try New Products – Free!", they are taken to an online lead capture form. The Product Trial Candidate box is checked on the online form and on the lead record created when the form is submitted.

If you want to pass custom field information into your online lead capture forms, first determine the custom field ID. This can be found in the ID field on the custom field record. A URL with custom field parameters should follow this format:

```
https://system.netsuite.com/app/site/crm/externalleadpage.nl?compid=ACCT000000&formid=1&h=1bdc8
0a058
&custentity1=industryperiodical
```

Custom check box fields follow the following format:

```
https://system.netsuite.com/app/site/crm/externalleadpage.nl?compid=ACCT000000&formid=1&h=1bdc8
0a058
&custentity2=T
```

If you want the check box marked, set the parameter to **T** in the URL. To clear the check box, pass **F** through the URL.

For more information on creating custom fields, see the **SuiteBuilder** user guide.

Passing Parameters from Third Party Sites

If your site is not hosted by NetSuite, you must include Javascript in the code of your web pages so that parameters are passed to any online customer forms you link to.

The following Javascript code must be placed at the bottom of each page in your website. It should not be placed inside any HTML tags and should be the last code before the **</body>** tag.

```
<script type="text/javascript">
<!--
function getNS_url_param( name ){
name = name.replace(/[\[]/,"\\\[").replace(/[\]]/,"\\\]");
var regexS = "[\\?&]"+name+"=([^&#]*)";
var regex = new RegExp( regexS );
var results = regex.exec( window.location.href );
if( results == null )
return "";
else
return results[1];
}
function trackNSParams() {
var name = 'leadsource';
var value = getNS_url_param(name);
if (value != null && value.length > 0)
document.cookie = name+"="+value+"; path=/";
}
function appendNSParams(url) {
var nameEQ = "leadsource=";
var ca = document.cookie.split(';');
for(var i=0;i < ca.length;i++) {
```

```
var c = ca[i];
while (c.charAt(0)==' ') c = c.substring(1,c.length);
if (c.indexOf(nameEQ) == 0 )
      url = url + '&' + nameEQ + c.substring(nameEQ.length,c.length);
}
return url;
}
// -->
trackNSParams();
</script>
```

Then apply the following format to any links to online forms from your site (for example, Contact Us links):

```
<a href="#" onclick="document.location.href=appendNSParams(Publishable Form URL)">Contact Us
</a>
```

Paste the publishable form URL for the online customer form between the parentheses. For example:

```
<a href="#" onclick="document.location.href=appendNSParams(https://forms.netsuite.com/app/site/
crm/externalleadpage.nl?compid=1234567&formid=3&h=ed62a43be13c70de335b)">Contact Us
</a>
```

Be careful when copying and pasting the form URL that the single and double quotes are pasted properly. If necessary, you might need to retype the quotes.

Tips for Passing Parameters Through URLs

Consider the following tips for using parameters correctly in links:

- The **leadsource** parameter is used to pass the campaign ID into an online customer form. The campaign ID in the URL fills the Lead Source field on the online form.
- To pass a partner code through a URL, use the **partner** parameter. Partner codes can let you keep the partner-customer relationship transparent to the customer by keeping the partner's name from appearing in the URL.
- For check box fields, enter **T** as the value if you want the box checked, and enter **F** if you want the box clear. For example, a link that passes a parameter to a check box field would look like this:

  ```
  https://system.netsuite.com/app/site/crm/externalleadpage.nl?compid=ACCT000000&formid=1&h=1bdc8
  0a058&unsubscribe=T
  ```

- Campaign IDs, partner names, and partner codes passed in the parameter must be spelled and capitalized exactly as the information on the respective record.
- You can add as many parameters as you want to pass through to your online customer form. A link with multiple parameters should follow this format:

  ```
  https://system.netsuite.com/app/site/crm/externalleadpage.nl ?compid=ACCT000000&formid=1&h=1bdc
  80a058?partner=Wilson%20 Computers&leadsource=March%202010%20Flyer
  ```

  Each parameter beyond the first begins with an ampersand (&). Note that the first parameter, in this case **compid**, which is an internal parameter identifying your company, begins with a question mark (?). The partner and lead source parameters each begin with an ampersand.

- Replace any spaces in your URLs with **%20**.
- Often, it is useful to pass information into hidden fields on your online customer forms. Information in a hidden field is saved to the customer record when the online form is submitted, but the field is not seen by the person filling out the form.

  To hide a field on a form, check the box in the Hide column when selecting fields to include on your form.

Tracking Lead Sources for Web Store Visitors

Typically, as in the case of banner ads and paid search results, leads are directed to landing pages in your website rather than online forms. The method of tracking lead source and other information differs depending on whether you are using a NetSuite hosted site or a site hosted by a third party.

If you have enabled the Advanced Web Reports feature, you can pass lead source information in links to any page in your NetSuite website.

If you create a link to your home page with the **leadsource** parameter, this lead source is maintained for that visitor. When the visitor registers through your website, the lead source is saved in the customer record created by registration. This information is maintained even in the event that the visitor leaves your site and returns later. The lead source is also passed to the customer record if the visitor submits an online customer form even if the Lead Source field is not on the form.

> **Note:** In most cases, the link to your website has only the single parameter. The proper format for such a URL is
>
> **http://www.yourSite.com?leadsource=yourCampaign**.

In addition to lead source, you can also pass partner and promotion parameters in links to your site.

For information on passing parameters to third party-hosted sites, please see Passing Parameters from Third Party Sites.

Lead Reports and Analysis

NetSuite provides a full range of tools you can use to report on lead generation. With online form statistics and lead source reports, you can determine which efforts are the most successful at bringing in new leads.

Online Form Statistics

NetSuite keeps track of how often your online forms are viewed and filled out.

Statistics for online lead forms can be viewed on the External subtab of the form record. You can see:

- **Number of Requests** – Number of times someone navigates to this form
- **Number of Submits** – Number of times the form is submitted

To view online form statistics, go to Setup > Marketing > Online Customer Forms, and click View next to the online form you want to view. Then, click the External subtab.

Lead Source Reports

There are two sets of standard reports you can use to analyze how leads are coming into your company.

The Lead Source Analysis Summary Report list each lead source and the number of leads, prospects, and customers associated with it.

The Lead Source Analysis Detail Report lists the leads, prospects, and customers associated with each lead source, the customer's status, sales rep and date the customer's record was created.

> **Note:** These reports only include records that were originally entered as leads. Prospects and customers that do not start out as lead records are excluded.

For more information on these reports, see the help topic Marketing Reports.

Managing Campaigns

Campaign records are used to manage your marketing initiatives. With campaign records, you can manage your online marketing as well as your offline efforts. You can create and send email marketing messages, manage paid keywords, send promotions through the mail, and manage your advertising campaigns.

Campaigns can also be used to track leads from a variety of sources. You can monitor the keywords you purchase from search engines that bring new leads to your site or measure the return on investment for an purchased list of leads.

NetSuite provides the reports and tools necessary to manage and evaluate the marketing data that is important to your business.

In this chapter, you will learn how to set up your campaigns for maximum visibility into each layer of your marketing efforts: from category to campaign to event.

Campaign Categories

Campaign categories represent the highest level of the campaign data on campaign reports. Marketing campaigns are grouped into categories depending on the kind of campaigns you are running.

By default, campaign reports are grouped by campaign category. You can also filter the Campaigns list by category.

The following categories and subcategories are included by default:

- **Purchased Lists**
  - Direct Mail
  - Email
  - Phone
- **Print**
  - Magazine
  - Newspaper
- **Online**
  - Paid Keyword
  - Natural Keyword
  - Online
- **Broadcast**
  - Radio
  - TV
  - Webinar

To create a campaign category:

1. Go to Setup > Sales & Marketing Automation > Campaign Management > Categories > New.
2. Enter a name for the category.
3. If this is a subcategory, choose a parent category.

4. Select a default lead source for this category.

   When a customer selects a campaign category on an online customer form, this lead source is selected in the Lead Source field on the record created if no other lead source is associated with this customer.
5. Check the **Available Externally** box if you want this campaign category available for customers to select on online forms.
6. Click **Save**.

Campaign categories are tracked on the **Marketing** subtab of customer records. If you pass a customer's lead source through a link to an online customer form, the campaign's category is selected on the customer record that is created when the form is submitted.

Creating a Campaign Record

Campaign records are used to manage all the information that is important to your marketing efforts. On campaign records, you set the time and date events are sent, select the recipient groups, enter the overhead cost, and add information about your campaign that is important to your company's campaign reporting.

To create a marketing campaign:

1. Go to Campaigns > Marketing > Campaigns > New.
2. Under Primary Information:
   1. Enter an ID for this campaign in one of the following ways:
      - If you use auto-generated numbers for campaigns, an ID is generated automatically.
      - If you do not use auto-generated numbers for campaigns, enter an ID.

      Campaign IDs can be used to identify campaigns, especially in the event that campaigns share similar names.
   2. Enter a title for this campaign.
   3. Select the category this campaign belongs in.
   4. Select a campaign manager for this campaign.

      The campaign manager receives confirmation that email campaign events have been sent.
   5. Enter or pick the start date and end date for this campaign.
   6. In the **Base Cost** field, enter the cost of this campaign apart from the cost of any specific campaign events.

      You can enter the cost of specific events on the **Events** subtab.

      The **Total Cost** field shows the sum of the cost of any campaign events and the base cost.
   7. In the **Expected Revenue** field, enter the amount of revenue you expect this campaign to generate.
   8. Enter the URL for the campaign landing page or online customer form associated with this campaign.
   9. Enter a description.
3. Under Related Information:
   1. In the **Vertical** field, select a marketing vertical related to this campaign.

For more information, see the help topic Campaign Verticals.

2. Select a promotion you want to associate with this campaign.

> **Important:** You should not associate the same promotion with multiple campaigns or campaign events.

Promotions enable you to offer discounts as part of the campaign. For more info, see the help topic Promotions.

3. Select the items associated with this marketing campaign.
4. If you want to associate an offer with this campaign event, select that offer.
5. In the **Audience Description** field, select an audience for this campaign.

For more information, see the help topic Campaign Audiences.

4. Click **Save**.

Now you can schedule campaign events, enter keywords, add notes, and attach files and other related information.

Scheduling Campaign Events

Campaign events represent individual aspects of this campaign.

For example, a campaign could include three events: a series of print ads, an email message sent to existing customers and a banner ad on partner websites.

To schedule a campaign event:

1. On the campaign record, click the **Events** subtab.
2. On the **Events** subtab, click the subtab for the campaign channel used for this event.
3. In the **Target Group** column, select the group that receives this campaign event.
4. If you are creating an email or direct mail campaign event, select the template for the email or direct mailing in the **Template** column.

   If you use the **CRM Template Categories** feature, you can select a category in the **Template Category** column to filter the list of templates.
5. Enter a title for this campaign event.

   In the **Subscription** column, the subscription category for the template you are using is chosen by default. Only recipients that have this subscription receive this campaign event. For more information, see Campaign Subscription Categories.

   You can select a different subscription than the default for this template.
6. In the **Channel** column, choose the method used to deliver this event.
7. Enter the cost incurred by this campaign event.

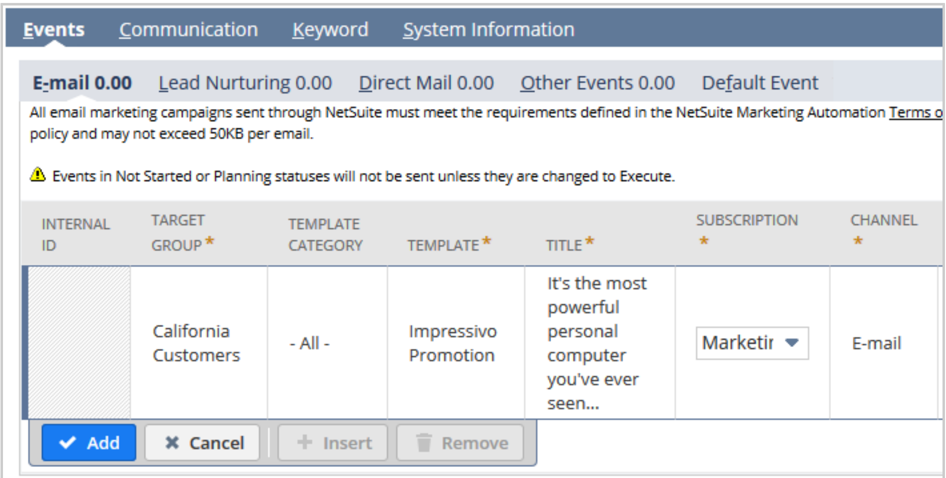
   Entering a cost lets you track return on investment (ROI) for the campaign. The **Total Cost** field at the top of the page shows the sum of the base cost plus the cost of each campaign event.
8. In the **Status** column, select the status of the campaign event.

   If you select **Execute** for an email campaign event, NetSuite will send your email on the date and time you set.

9. Select the date and time this campaign event will occur.

> **Note:** You cannot change the time of day an email campaign executes on the day it is scheduled to be delivered.

10. Leave the field **Internal ID** empty. When you save the campaign, a number will be automatically generated for this field. This internal ID will be available in forms as **Event ID** or **Campaign Event**, which will allow tracking responses to events.



11. Click **Add**.
12. Repeat these steps for other campaign events you want to schedule within this campaign.

Campaign Events

Campaign events are used when a single marketing campaign has several distinct phases or channels. Events are tracked on the Email, Direct Mail, and Other Events subtabs under the Events subtab on campaign records.

Not all campaigns have individual events. Campaign events are best used for scheduled aspects of a campaign, like email blasts, or when you are generating a campaign message with NetSuite, such as printing letters with the Mail Merge feature. You can schedule the time and date of a campaign event and track its progress on the campaign record.

> **Note:** Keyword campaigns should not have individual events. Each keyword you purchase should have its own individual campaign record. For more information, see Paid Search Marketing.

Campaign Channels

There are five default campaign channels: direct mail, email, phone, print ad, and misc.

Campaign events for different channels are tracked on the Events subtab on the campaign record. A separate subtab is used to track campaigns in each channel— **Email**, **Direct Mail**, and **Other**.

An administrator can create new campaign channels at Setup > Sales & Marketing Automation > Campaign Channels > New.

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Campaign Event Status

You can track the progress of campaign events in the Status field of the event. You can choose from the following statuses:

- **Not Started** – This status is used for events that are in the earliest stage.
- **Planning** – This status indicates that the event is being prepared or delivered, but it is not complete.
- **Execute** – This status is used for email campaign events.

  Setting an email campaign event to **Execute** tells NetSuite to send the email on the date and time you have selected.
- **Sent** – This status indicates that a campaign event has been completed and delivered to the recipients.

  NetSuite automatically sets email campaign events to **Sent** after the system generates and sends the email.
- **Failed** – This status indicates that a campaign event was not able to be sent by NetSuite. The most common reason for a failed campaign is exceeding your monthly email allotment.

  This status is not used for campaign email events that are successfully sent but cannot be delivered due to external issues like invalid email addresses or problems with the recipient's email server. If an event fails, you must create a new event and send it again.

Now that you are familiar with NetSuite terminology, you are ready to learn about the marketing metrics tracked by NetSuite.

Initiating Campaign Events

As soon as you have entered the campaign record, you can set campaign events to execute. This is especially important for email campaigns because setting an email campaign event status to **Execute** tells NetSuite to generate and send your email messages at the date and time you choose.

To set an event to execute:

1. From the list of campaigns, click **Edit** next to the campaign you want to execute.
2. On the **Events** subtab, click on the event you want to execute.
3. In the **Status** column, select **Execute**.
4. Select the date and time you want the event to be sent.

   NetSuite sends email campaigns on the time and date you set here.

   > **Note:** You cannot change the time of day for an email campaign event on the date it is scheduled to send.

5. Click **Add/Edit.**
6. Click **Save**.

When email has been sent, you receive email notification informing you that the event executed, and the status of the event is automatically marked **Sent**.

For direct mail events, you can perform a letter merge operation to prepare the letters and mailing labels. After you mail the letters, change the status of the campaign event to **Sent**.

Campaign Metrics

NetSuite reporting tools offer the following metrics for measuring the effectiveness of marketing campaigns on sales and lead generation. You can access these reports from the menu links in the Marketing section of the Reports page. Go to Reports > Marketing.

Metric	Description	Relevant Reports
Return on Investment (ROI)	Calculating ROI requires that you enter the cost of each campaign or campaign event. Transaction revenue is attributed to a campaign when the campaign is selected on the transaction record.	Campaign ROI Analysis Summary & Detail Sales by Paid Keyword Summary & Detail Sales by Lead Source Summary & Detail
Lead Source	Lead sources reference the names of your campaigns. Tracking lead sources lets you determine which campaigns are bringing in new customers and contacts. Lead source is tracked in the Lead Source field on lead, prospect, customer, and contact records. For information on lead sources, see Lead Sources.	Lead Source Analysis Summary & Detail Gross Lead Source Analysis Summary & Detail Leads by Paid Keyword Summary & Detail
Campaign Response	You can track campaign responses automatically for email campaigns. You must manually indicate each recipient's response to campaigns that use non-email channels.	Campaign Response Summary & Detail

Tracking Campaign Revenue

When a campaign is selected in the Lead Source field on a transaction, the transaction's revenue is tied to the campaign.

Before you send your first campaign, you should set the Default Lead Source on Sales Transactions preference at Setup > Sales & Marketing Automation > Set Up Marketing. This preference determines which campaign is selected by default in the Lead Source field on transactions entered manually or taken through your web store.

You can choose from the following:

- **First Campaign Sent** – The campaign that was first sent to the customer is selected by default.
- **Most Recent Campaign Sent** – The campaign event that was most recently sent to the customer is selected by default.
- **First Campaign Responded To** – The first campaign the customer responded to is selected by default.
- **Most Recent Campaign Responded To** – The campaign that was most recently responded to by the customer is selected by default.
- **Based on Lead Source** – The lead source on the customer record is selected by default.

This preference is set to **Based on Lead Source** by default. You can associate a customer with a campaign in three ways:

- Pass a campaign ID or lead source parameter through a link to an online customer form.
- Pass a campaign ID or lead source parameter through a link to your NetSuite website.
- Manually select the campaign in the Lead Source field on the lead, prospect or customer record.

For more information on passing parameters, see Passing Parameters Through URLs. For more information on how lead source is tracked for web store visitors, see Tracking Lead Sources for Web Store Visitors.

Cost and ROI

Return on investment (ROI) is a measured by comparing the cost of a campaign with the revenue it generates.

When you initiate a campaign, enter the cost of the campaign in the Base Cost field. If the campaign is made up of individual campaign events, enter the cost of each campaign event. The sum of the cost of all campaign events and the campaign's base cost is calculated in the Total Cost field.

After orders are entered that include lead sources, the sales revenue is tied to your campaigns. ROI is calculated by dividing the revenue by the cost of the campaign.

For information on ROI reports, see the help topics Campaign ROI Analysis Summary Report and Campaign ROI Analysis Detail Report.

Tracking Campaign Responses

Campaign response information helps you refine how you deliver your campaigns.

You can track the following responses from campaign recipients. These responses can be seen in the Response Detail column of the campaign response record:

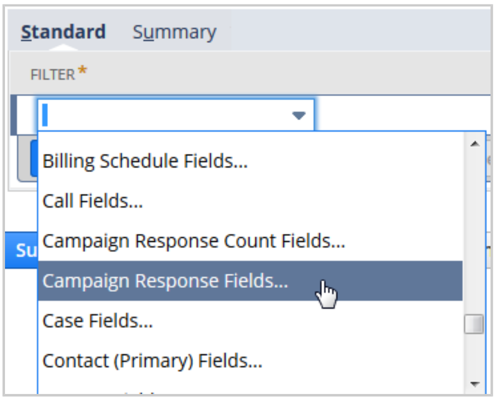
- **Received** – The recipient received the campaign but has not responded or purchased. This status is only applicable to non-email campaigns.
- **Responded** – The recipient either replied to the From address on the campaign email message, or the recipient submitted an online customer form that included the campaign's lead source or promotion.
- **Purchased** – The recipient made a purchase because of the campaign.
- **Sent** – The campaign has been sent.

You can also track the following responses to email campaigns:

- **Queued** – The email has been placed in a queue to be sent but has not yet been sent.
- **Opened** – The recipient opened the email message.
- **Clicked Thru** – The recipient opened and clicked a link in the email message.
- **Failed - delivery failure** - The email was sent, but it could not be delivered.
- **Failed - invalid address** – The email was sent, but delivery failed because the email address was invalid. This is also known as a hard bounce. For more information on managing hard bounces, see Managing Bounced Email.
- **Failed - miscellaneous delivery failure** - The email was sent, but delivery failed because of a miscellaneous delivery error.
- **Failed - spam** – The email was sent, but it was marked as spam by the recipient or the recipient's content filter. This is considered a soft bounce.
- **Failed - delivery failure** – The email was sent, but network issues out of NetSuite's control prevented its delivery. This is considered a soft bounce.
- **Failed - other** – The email was sent, but it was not delivered for unknown reasons. This response can only be set via web services. This is considered a soft bounce.

- **Subscribed** – The recipient subscribed to your campaigns through the Unsubscribe link in the email message.
- **Unsubscribed** – The recipient unsubscribed to your campaigns through the Unsubscribe link in the email message.

In addition to these response details, additional information is available in the Note field of the campaign response. These descriptions can be included in searches or reports. On reports, you can add the Comment field as a column or filter. To include these responses in searches, use the Response Comments field in the Campaign Response fields.



> **Note:** Email campaign responses are tracked automatically if you check the Track Outgoing Email box on the marketing template record. When a recipient opens and clicks through the email the response is automatically recorded. If the recipient's email client is configured to not display images or HTML, the tracking pixel will not automatically update the status of the campaign event.

Statistics on sent and bounced email can take longer to update based on the size of your recipient list and the rate the recipient's email servers accept your email. As data is received by NetSuite, statistics are updated every two hours on reports and on the Statistics subtab of campaign records.

The following campaign responses are no longer in use but are tracked on older email campaign events and can be shown in searches and on reports: Invalid Sender Address, Mail Protocol Issues, Mailbox Disabled, Mailbox is Full, Mailbox not Accepting Messages, Media Error, Messages Exceeds Size/Limit, Network/Server Issues, Security Issues, and Too Many Recipients.

Entering Campaign Responses

You can manually mark a recipient's response on the Campaigns subtab of the recipient's record. This is useful for campaigns that do not automatically track response like email campaigns do.

To enter a new campaign response:

1. Open the recipient's record.
2. Click the **Marketing** subtab.
3. Click the **Campaigns** subtab.
4. Click **Add Response**.
5. In the New Campaign Response popup window, select the campaign the recipient responded to.
6. Select the campaign event the recipient responded to.

7. Enter the date and time of the response.
8. In the **New Response Detail** field, select the response type.
9. Enter any notes related to the response.
10. Click **Save**.

The response history for each campaign is tracked along with the date and time of those responses.

To update the status of an existing campaign response:

1. Open the recipient's record.
2. Click the **Marketing** subtab.
3. Click the **Campaigns** subtab.
4. Click **Update Status** next to the campaign event you want to update.
5. In the Campaign Response popup window, set the date and time for this response..
6. In the **New Response Detail** field, select the new response.
7. Enter a note about the campaign response.
8. Click **Save New Response**.

To delete all responses to a campaign, click Update Status next to the campaign, and under Actions, click Delete.

> **Note:** The Response column shows the most recent response for each campaign sent to this recipient. There may be a delay in reporting the response statuses of Sent and Bounced.

You can view how recipients respond to your campaign events with the Campaign Response Summary and Detail reports. For more information, see the help topic Marketing Reports.

Additionally, you can view data on the Statistics subtab of campaign records. There you can see cost analysis like total revenue, ROI, profit, as well as cost per lead and per purchaser. You can also see the number of leads and website visitors generated by the campaign.

Email with Multiple Links

In a marketing email message **Clicked Thru** campaign response is returned whenever any of the links is clicked in the email message. You can see which specific links are clicked by recipients in the Campaign Clickthrough report. For more information, see the help topic Campaign Clickthrough Detail Report.

Bounced Email

There are various reasons why an email message might not be delivered, or bounce. Some are temporary and result in soft bounces, whereas others can be the result of permanent issues and result in hard bounces. A hard bounce is indicated by the **Failed - invalid address** campaign response.

> **Note:** If an email address generates a **hard bounced** response, NetSuite will restrict its inclusion in subsequent campaigns for a period of 30 days or 90 days, depending on whether DKIM and an email domain have been set up. Attempts to send to the bounced address before the time has elapsed will result in an unsent message and a campaign response — Failed - invalid address.

As of 2017.1, two enhancements assist administrators in working with bounced emails:

- A new saved search, Undelivered Emails, accessed from Lists > Mailing > Undelivered Emails.

  For more information, see Managing Bounced Email.
- The Bounced Email Addresses list is more inclusive. For more information, see Viewing the Bounced Email Address List.

Hard Bounce Reasons

- Unknown User
- Bad Domain
- Address Error
- Account Closed
- Receiver Error
- Hard Bounced - Other (used when unable to determine one of the four main reasons above)

Soft Bounce Reasons

- Mailbox Full
- Disabled Account
- Greylisted
- Server Too Busy
- Soft Bounce - Other (used when unable to determine one of the four main reasons above)

For information on excluding email addresses that have returned hard bounce responses, see Choosing Email Recipients.

Mail Merge vs. Email Campaigns

As with marketing campaigns, NetSuite's Mail Merge feature enables you to create personalized email in bulk. Using campaigns for your marketing email ensures that you are able to track revenue, lead source and other marketing information for your campaign events.

For campaign events that use a channel other than email, NetSuite Mail Merge tools can help you create fax, PDF, or letter documents for your marketing events. For more information on merging letters, see the help topic Working with Mail Merge.

Creating Target Groups for Campaigns

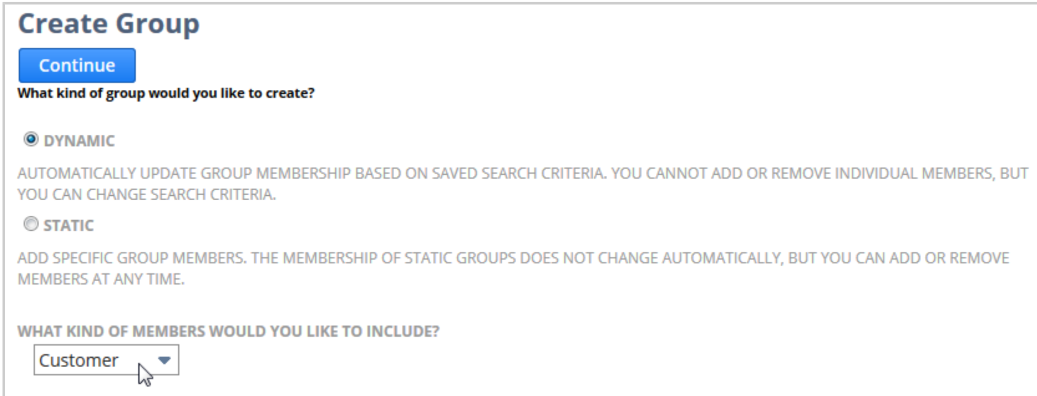
Email and direct mail campaign events target segments of customers, prospects, or leads. You can create new customer groups based on such purchase history criteria as items purchased, purchase dates and amount purchased.

You can also create groups based on location, customer category or lead source.

To create a customer group:

1. Go to Campaigns > Marketing > Groups > New.

2. On the Create Group page, choose **Dynamic**, and select **Customer** in the list.



3. Click **Continue**.
4. On the Create Dynamic Customer Group page, enter a name for your group.
5. Next to the **Saved Search** field, click **New**.
6. In the New Saved Search popup window, select what you want to base your customer group on.

   You can base a customer group on searches for transaction and case criteria in addition to customer criteria.
7. Enter the criteria customers must meet to be included in this group.
8. Click **Save**.
9. On the Create Customer Dynamic Group page, in the **Comments** field, enter a description of the group.
10. Check the **Private** box, if you want to be the only one to use this group.
11. In the **Restrict To** field, select the employee group you want to have access to this group.

    For example, you can select a group of marketing reps in this field to make this group only available to those reps.
12. Click **Save**.

Now you can select this group in the Group field on marketing campaign events.

Marketing to Contacts

Depending on the nature of your customer base, you may need to target contacts with your marketing campaigns instead of the customer they work for.

You can create a target group of contacts based on the characteristics of the customer they are employed by.

> Wolfe Electronics is sending email messages to let customers know about a summer sales promotion. Rather than sending the email to the customer's company email address, the Wolfe marketing manager sends it to their primary customer contacts. This email includes a coupon code that is to be used when placing an order.
>
> Wolfe marketing manager creates a new customer search by filtering out customers that have not purchased within the last year. Then, they create a group made up of the primary contacts for these customers.

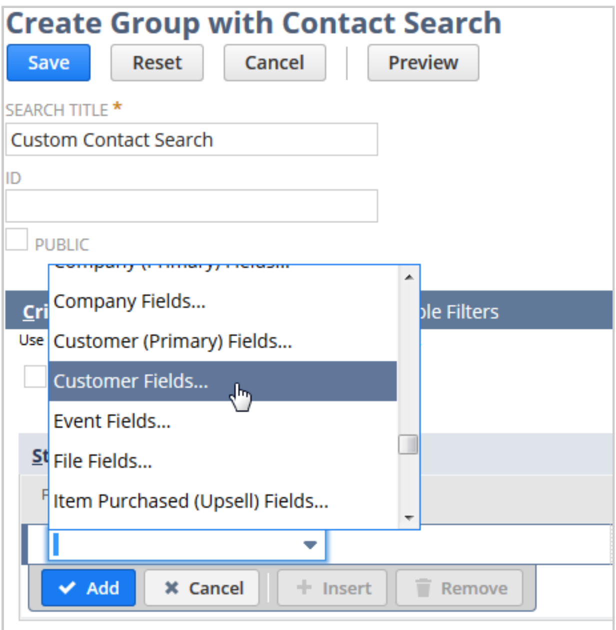
You can track lead sources for contacts as you do for leads, prospects, and customers. There is no transaction or revenue impact of a contact's lead source, however, contact lead sources can help you understand which marketing campaigns are most effective at bringing contacts to your company.

You can use online customer forms to capture contact information. For more information, see the help topic Using Online Customer Forms for Contacts.

Before you create a dynamic contact group based on customer criteria, you must first create the contact saved search the group is based on.

To create a contact group based on customer criteria:

1. Go to Campaigns > Contacts > Search.
2. Make sure the **Use Advanced Search** box is checked.
3. Click **Create Saved Search**.
4. On the **Criteria** subtab, set criteria based on customer fields.



5. After setting the customer criteria, click **Save**.
6. Go to Campaigns > Marketing > Groups > New.
7. On the Create Group page, choose **Dynamic**, and select **Contact** in the list.
8. Enter a name for this group.
9. Next to the **Saved Search** field, choose the saved search you created.
10. Click **Save**.

After you have sent a campaign message to contacts, you can track the revenue as if the event targeted the customers the contacts work for.

After viewing the marketing email, the contacts place orders on behalf of their employers. As each order is placed over the phone, Wolfe sales reps enter the campaign's coupon code on the order. Later, Wolfe marketing managers can view the Campaign ROI Analysis and Sales by Promotion reports to determine how successful the campaign was.

When contacts submit online customer forms, it is tracked on the Online Forms subtab on the contact record. By default, the name of the online form, the contact's company, and the lead source that resulted in the form submission are shown for each submission. The submission is also shown on the Online Forms subtab of the customer record the contact is associated with.

Campaign Calendar

You can choose to show campaign events in calendar portlets on your dashboard.

To add campaign events to a calendar portlet:

1. Click **Set Up** on the calendar portlet.
2. Check the **Show Campaign Events** box.
3. Click **Save**.

You can choose to include campaign events in the same calendar as your other events, tasks, and phone calls, or you can choose to add a separate calendar for campaigns.

Tips for Campaigns

Below you will find information to help you manage two common marketing scenarios: direct mail and imported leads lists.

Direct Mail

The biggest challenge when managing a direct mail campaign is ensuring that campaigns associated with your direct mailings are transferred to the customer record and resulting sales.

Unlike email campaigns, linking a direct mail campaign with the revenue relies on the sales rep manually selecting the lead source on the sales transaction. To set a lead source for a lead, prospect, or customer, open the record. In the Lead Source field, select the campaign that brought this customer to your company.

You can use the Mail Merge feature to create personalized mailings in NetSuite and print address labels for the recipients.

Imported Leads Lists

You can import lists of leads into NetSuite via CSV or XML files.

To ensure that these leads are associated with the appropriate lead source, do one of the following:

- **For CSV imports** – In the **Lead Source** column, paste the name of the campaign you are using to track this list of leads.
- **For XML imports** – Include the **leadSourceRef** element in the import for each record.

For both types of imports, the lead source must **exactly** match the name of the campaign record.

If you default lead sources on sales transactions as described in Tracking Campaign Revenue, you can link the revenue generated by these leads to the campaign.

To track revenue for imported leads, be sure to set the Default Lead Source on Sales Transactions preference at Setup > Sales & Marketing Automation > Set Up Marketing to **Based on Lead Source**.

Then, when a transaction is entered for a customer with this lead source, the campaign event is defaulted on the transaction, enabling you to track campaign revenue and calculate ROI.

Wolfe Electronics purchases a list of leads from a consulting firm. Before the marketing administrator imports the leads into their NetSuite account, they create a campaign titled Summer 2017 Fleming Consulting Leads.

Now that you understand how to execute your marketing campaigns through NetSuite, you can learn how to create and manage email marketing campaigns.

Email Marketing Campaigns

The integrated marketing tools in NetSuite enable you to create and track all aspects of your email campaigns. You can measure return on investment, determine which email campaigns produce the most leads, and view reports of how many recipients are receiving your offers.

Unlike other campaign channels, campaign email is created and sent by NetSuite at the time and date you set on campaign records.

You can create email marketing campaigns to be sent a set date and time, and you can also set up lead nurturing email campaigns that are sent according to criteria you set. For information on lead nurturing campaigns, see Lead Nurturing Campaigns.

Email campaigns can also be used to send and track email newsletters. Using campaigns enables you to track how readers respond to your newsletters. For more information, see Sending Newsletters Through Email Campaigns.

Campaign email is generated from HTML templates you create. These templates can be personalized to include the name, address, and other information specific to the customer or contact receiving the email.

Email Campaign Checklist

To execute an email campaign in NetSuite, complete these steps:

- Set up a campaign email domain.
- Have an administrator set up DKIM.
- Validate campaign email addresses.
- Create an email marketing template.
- Create a recipient group.
- Create the campaign record.
- Set the time and date of the email event.
- As soon as you have completed these steps, change the event's status to Execute.

Email Best Practices

The following best practices include the use of industry-standard email authentication through DomainKeys Identified Mail (DKIM) and campaign email domains, as well as the careful maintenance of lists of recipients who have elected to receive your email messages. Both practices work to increase your deliverability and reduce the incidence of your email messages being reported as spam.

The following sections show you how to implement email campaigns in NetSuite and offer tips for optimizing your email campaign delivery.

Five Golden Rules For Outbound Email		
1	**Always send using a FROM domain you control**	▪ Do not send email messages on behalf of customers, and never use customer email addresses in the FROM field. ▪ Never send from addresses using a DNS record you don't control.

		▫ For emailed forms, or email messages related to transactions, ensure that the **Return Email Address** field in Setting Email Preferences is specifying your domain. ▫ For campaign email messages, see Campaign Email Domains.
2	**Manage Your Scripts**	Check your SuiteScript outbound mail scripts regularly. Delete any obsolete scripts or deprecated customizations promptly.
3	**Be Compliant**	▪ Ensure you have proper DNS records set up for DKIM on the domains you send email from. See DomainKeys Identified Mail (DKIM) and DomainKeys Identified Mail (DKIM) and Email Domains. ▪ Consider setting up a DMARC policy record for your company's entire email infrastructure. See Domain-based Message Authentication, Reporting and Conformance (DMARC). ▪ For NetSuite purposes, as of 2018.1, it is no longer necessary to set up DNS records for SPF on the domains you send email from. However, depending on the needs of your company, it might be necessary to create a DNS record for SPF. See Sender Policy Framework (SPF).
4	**Be Aligned**	If you have an email relay between NetSuite and your mailbox provider (where the MX points), ensure the MAIL-FROM (ENVELOPE-FROM, RETURN-PATH) is rewritten to pass the SPF check.
5	**Be Hygienic**	▪ Never send spam or unwanted email. ▪ Never send single email more than a single time. ▪ Always honor unsubscribe requests. ▪ Do not send or forward email with content (especially attachments) that is unknown to you.

Refer your marketing administrators to Optimizing Email Campaigns for an overview of the processes they can use to ensure your company's campaigns are reaching their audience effectively.

DomainKeys Identified Mail (DKIM) and Email Domains

When you create your email template, you can select your company's email domain. This domain replaces each instance of the `netsuite.com` domain that would show in your email by default.

For email messages sent as emailed forms, or email messages related to your transactions, you can select your company's email domain when setting up your account. For more information, see the help topic Setting Email Preferences. In an ideal case, the domains implied by both the **Campaign Email Domains** configuration and **Setting Email Preferences** should be the ones whose DNS records you control.

This same domain can be used for DomainKeys Identified Mail (DKIM) email authentication. DKIM is an accepted method of vouching for the email you send. Many ISPs like Google and Yahoo identify email in their recipients' inboxes that has used DKIM, and they also verify their own email with this method.

For more information on setting up email domains and DKIM, direct your administrator to Campaign Email Domains and DomainKeys Identified Mail (DKIM).

Domain-based Message Authentication, Reporting and Conformance (DMARC)

Using DMARC, an administrator of a domain can determine how email messages using an address from the sender's domain will be perceived by a receiving system. DMARC informs the receiver which validations (SPF or DKIM, or both) will pass to trust that the email message has been sent by the sender identified by the **From:** address. For more information about DMARC, see the help topic Creating DMARC-compliant messaging in NetSuite.

Consider setting up a a DMARC policy record with your domain provider. A DMARC policy record is a DNS resource record of the type TXT. The shortest valid DMARC policy record is `v=DMARC1; p=none`. To assist with email deliverability analysis, include an email address (or addresses) to which reports of aggregated feedback can be sent. Use the `rua` tag to list the address (or addresses) for aggregate feedback reports in your policy. For example, `rua=mailto:aggrep@example.com`.

> **Important:** Setting up a DMARC policy affects the entire email infrastructure of your company. The administrator responsible for your company's email infrastructure should be involved in setting up a DMARC policy record with your domain provider. Using the optional `rua` tag might consume some of your company's email resources, depending on the volume of reports you might receive.

For more information about DMARC, go to https://dmarc.org/overview. You might find the **Anatomy of a DMARC resource record** and **How Senders Deploy DMARC in 5-Easy Steps** sections of that page particularly helpful. See also the DMARC specification, RFC 7489.

Sender Policy Framework (SPF)

SPF is a Simple Mail Transfer Protocol (SMTP) validation system that verifies the IP address of an email sender. It lets administrators determine which servers can send email messages from a particular domain.

> **Important:** As of 2018.1, SPF alignment with your DMARC policy record is no longer required when you send email from NetSuite. Set up an SPF record only when it is specifically required by a recipient's email system.

An SPF record is a TXT record using the SPF format with your DNS provider. An SMTP server on the receiving end determines (based on the content of the DNS TXT record) whether the IP address the email message is sent from is approved for that domain. Setting up a DNS TXT record for SPF might be required by the email infrastructure or services (as presented by email domains) that you send email to.

If you must include NetSuite systems in your SPF DNS record, ensure that the definition `'include:mailsenders.netsuite.com'` is a part of the that record.

> **Note:** Never whitelist the range of NetSuite IP addresses. For more information, see the help topic NetSuite IP Addresses.

Optimizing Email Campaigns

NetSuite provides all the tools your marketing department needs to maximize the deliverability of your email campaigns and build your reputation with ISPs as a legitimate marketer.

The NetSuite Marketing Application Terms of Service specifically prohibit the use of email marketing campaigns for sending spam. **Spam is defined as any email that is sent to recipients who do not want to receive it.**

Spam is not restricted to email with inappropriate or harmful content. Spam is defined only by whether or not the recipient has agreed to receive it. For example, email sent to a list purchased from a third party is considered spam.

To ensure that those who use campaigns irresponsibly do not adversely impact legitimate marketing campaigns, NetSuite employs criteria to separate appropriate email campaigns from email that might be spam.

When you send email campaign messages that meet the characteristics of legitimate marketing email, they are sent at a higher priority than those that do not. Additionally, email that meets these characteristics has a higher delivery rate as it is less likely an ISP would consider it spam.

Our email policies abide by the standards set by the Messaging Anti-Abuse Working Group (MAAWG) of which NetSuite is a supporting member. For more information, visit MAAWG's Web site.

These standards apply only to the following types of email in NetSuite:

- campaign email
- bulk merge email
- SuiteScript-initiated email (by the **nlapiSendEmail()** or **nlapiSendFax()** API calls)

> **Important:** If you use the UK Edition, to comply with UK law, the name of your business address and VAT number are included in the footer of all email you send to those outside of your company.

In accordance with the CAN-SPAM act, NetSuite campaign email is not sent to email addresses with wireless domains. If you have recipients whose email addresses have domains that are listed on the Federal Communications Commission (FCC) Web site, they will not receive campaign email.

This section provides an overview of how you can maximize the deliverability of your email campaigns.

Characteristics of Legitimate Campaign Email

Campaign email that abides by our Terms of Service is sent with a higher priority than email that does not meet the criteria below.

Legitimate marketing email has the following characteristics:

- The recipients have opted in to your campaigns. **This is the most important indicator in determining whether an email message is spam.**

  For information on opting in to campaigns, see How Customers Opt In to Marketing Campaigns.
- The campaign recipients have purchased or responded to your campaigns in the past.
- The email uses a campaign email domain.

  For information on campaign email domains, see Campaign Email Domains.
- The email uses domain key identified mail (DKIM).

  You can use the same domain you use for your campaign email domain for DKIM. For more information, see DomainKeys Identified Mail (DKIM).
- You have garnered a positive sender reputation through your previous campaigns.

  For more information, see Developing a Positive Email Sender Reputation.

Characteristics of Possible Spam

Email that does not exhibit the characteristics of legitimate marketing email is sent with a significantly lower priority.

Email that might be spam has some or all of the following characteristics:

- The recipients have **not** opted in to the campaign. **This is the strongest indication that a campaign might be spam**.

  To ensure that your recipients list includes only those who want to receive your email, send campaign subscription invitations. For information on how to have your customers opt in to your campaigns, see Opt-In Email.

  > **Note:** In some jurisdictions, such as the European Union (EU), there are regulations regarding whether or not you can contact entities if you do not have their explicit permission to do so. Ensure that you adhere to these regulations when you send both subscription invitations and campaign email.

- You have garnered a poor sender reputation based on previous campaigns.
- The recipients have not purchased from you or responded to previous campaigns.

To improve the speed at which your email is sent and the rate at which it is delivered, see Improving the Deliverability of Your Campaign Email.

Campaign Email Limits

If you have not set up DKIM and an email domain, you are limited to 10,000 messages per campaign.

Your system administrator can set up DKIM and campaign email domains. Your company must first purchase a domain from a domain provider like GoDaddy.com or Network Solutions. DKIM and email domains are required to send more than 10,000 email messages per campaign (or email merge) or more than 100,000 bulk email per month.

If you have DKIM set up, there is no limit on the number of email messages you can send in a single merge or campaign. The only limit is the monthly allotment of email messages you have purchased. Email that is sent by NetSuite servers is counted towards your monthly allotment even if it does not reach its target recipient.

Subscription opt-in email does not count against your monthly email allotment.

Choosing Email Recipients

After you have created your email template, it is time to create a group of recipients to whom you will be sending your marketing campaign. For best results, you should only send email campaign messages to:

- Customers who have subscribed to your marketing campaigns (with a Confirmed Opt-In status).
- Email addresses that have not resulted in bounced email.

For more information on how to create a group of recipients, see the help topic Working with Groups.

Before adding a customer to a recipient group in NetSuite, it is important that you give them an opportunity to subscribe to your campaigns. Campaigns sent to subscribed customers have a much higher delivery success rate than those who have not explicitly subscribed. NetSuite provides a variety of tools you can use to invite recipients to opt in. For more information on subscriptions, see Subscription Management.

Repeatedly sending email to an invalid email address damages your sender reputation. To help with this, NetSuite automatically logs when email messages return hard bounce responses and does not send email to those addresses for a designated period of time. For more information, see Managing Bounced Email.

To ensure that you only send email to valid email addresses, be sure you have set a suitable time increment for bounced email addresses at Setup > Marketing > Preferences > Marketing Preferences > Subscription.

Selecting the right group of recipients is important in ensuring that your email is delivered quickly and successfully. When creating a target group with search criteria, consider including the following criteria in addition to the other criteria you use to select your recipients:

- **Global Subscription Status** is **Confirmed Opt-In**

  Sending to recipients who have confirmed that they want to receive your email is the most important factor in determining if your email meets the Marketing Automation Terms of Service.

  You can send email campaigns to recipients with the status of Soft Opt-In, but your email might not be delivered as quickly or as successfully as it would be to Confirmed Opt-In customers.
- Hard Bounced is **false**.

  If you have set the Remove email addresses from Bounced Email Addresses list after preference, these email addresses are not sent email, but adding this criterion prevents you from incurring a charge for these messages.
- **Campaign Response Fields...: Campaign Response Filter: Response** is none of **Failed - spam**

  This filters recipients who have flagged your email as spam in the past.

Careful management of your recipient lists improves your campaigns' performance, and it also creates trust between you and those with whom you do business. For more information on creating searches, see the help topic Search Overview.

Developing a Positive Email Sender Reputation

NetSuite considers your email history to determine whether your email meets NetSuite's best practice criteria. This includes:

- The percentage of campaign email that is replied to.
- The percentage of email sent to invalid email addresses.
- The percentage of your campaign email that leads to spam complaints from recipients and ISPs.
- The purchase and response history of recipients.

Maintaining a positive sender reputation leads to faster delivery.

Improving the Deliverability of Your Campaign Email

If you want your email sent at the optimal rate of delivery, you should do the following:

- **Invite recipients to opt in to your campaigns.**

  You can send campaigns to recipients with the Soft Opt-In status, but having recipients subscribe can increase the deliverability of your email.

  You can invite your customers to opt in by going to Campaigns > Other > Mass Updates. Under the Marketing heading, select the Send Subscription Message update you want to perform. For more information, see Opt-In Email.
- Only send campaign email to customers who have purchased from you or responded to prior campaigns. For tips on creating recipient groups, see Choosing Email Recipients.

- Set up a campaign email domain.
- Set up domain key identified mail (DKIM).

Subscription Management

NetSuite provides you with the tools you need to manage the email preferences of those with whom you do business.

Each email message you send through email campaigns or through email merge operations contains a message in the footer with a link and instructions for unsubscribing. For more information, see How Customers Opt In to Marketing Campaigns.

Email recipients can have one of four subscription statuses:

- **Confirmed Opt-In** - When an email recipient has subscribed to your marketing campaigns, they are assigned this subscription status. Only a lead or customer can set their subscription status to **Confirmed Opt-In**. For more information, see How Customers Opt In to Marketing Campaigns.

  Getting recipients to opt in results in better delivery rates and faster delivery because these messages are less likely to be labelled as spam by ISPs.
- **Soft Opt-In** - Recipients with this status receive all email marketing campaigns that are received by recipients with the **Confirmed Opt-In** status. They also receive opt-in messages that enable them to confirm whether or not they want to receive the email campaigns.

  Recipients cannot set their own status to **Soft Opt-In**; it is done within NetSuite, either manually or through mass update.
- **Soft Opt-Out** - Recipients with this status do not receive campaign email messages but they do receive opt-in messages.

  You can change this subscription status to **Soft Opt-In** manually or through a mass update. If you set a recipient's status to **Soft Opt-Out**, the recipient is unsubscribed from all subscription categories.
- **Confirmed Opt-Out** - Only the recipient can set their subscription status to **Confirmed Opt-Out**.

  Recipients with this status do not receive email campaigns or opt-in messages. Recipients with this status can opt in again only through the Customer Center or by clicking the link in a campaign message they have received prior to opting out.

Status	Receive campaigns?	Receive opt-in message?	Set by
Confirmed Opt-In	**yes**	**yes**	recipient only
Soft Opt-In	**yes**	**yes**	manual or mass update
Soft Opt-Out	no	**yes**	manual or mass update
Confirmed Opt-Out	no	no	recipient only

You can set new records to one of the soft statuses when you create them manually or through a CSV import. You cannot set confirmed statuses on the record or through an import.

> **Note:** Certain jurisdictions, such as the EU, have regulations regarding whether or not you can contact entities if you do not have their explicit permission to do so. You should check that your global subscription status adheres to the regulations in your entity jurisdiction.

Subscription status is tracked in the **Global Subscription Status** field on each record. This field is located in the Subscriptions subtab of the Marketing tab.

You can set the default global subscription status at Setup > Marketing > Preferences > Marketing Preferences.

If you use the Duplicate Detection and Merge feature, when you merge two records the subscription statuses on the master record are maintained on the final merged record.

To begin managing campaign subscriptions, see Setting Up Campaign Subscriptions.

Creating Subscriber Lists Using Saved Searches

You can use search filters to keep track of your campaign subscriptions and build exportable mailing lists. These lists are built using saved searches and can apply to both customers or contacts. A list of the most commonly used filters is as follows. For more information on creating saved searches, see the help topic Saved Searches.

Filter	Options	Comments
Global Subscription Status	Soft Opt-In Soft Opt-Out Confirmed Opt-In Confirmed Opt-Out	Refine your list to target the more receptive (confirmed opt-in) customers.
Inactive	Either, Yes, No	Set to No to only search for active customers or contacts.
Subscription	Select item from Campaign Subscriptions list.	First enable Subscription Categories, at Setup > Company > Enable Features.
Subscription Status	Either, Yes, No	Set to Yes and use with subscription filter to return positive instances of that Campaign Subscription.

When the saved search has been set up, you can export the search results in the required format. Supported formats include, CSV, Excel, and PDF.

Setting Up Campaign Subscriptions

The first step in managing campaign subscriptions in NetSuite is to set the Unsubscribed to Marketing by Default preference at Setup > Sales & Marketing Automation > Marketing Preferences. This preference determines whether new records are subscribed or unsubscribed by default. If you check this box, new leads, prospects, customers, and other records you create are assigned the Soft Opt-Out subscription status by default. If you clear this box, new records are set to Soft Opt-In. Do not clear this box unless you have provided the appropriate notices and obtained sufficient consent to automatically subscribe new and existing entities for marketing messages. For more information on global subscription statuses, see Subscription Management.

If you use the Subscription Categories featu re, you should next create subscription categories. This permits recipients to choose which types of campaign communication they want to receive rather than being subscribed (or unsubscribed) to all communication. For more information, see Campaign Subscription Categories.

You can also customize the opt-in email message text sent to your email recipients. For more information, see Opt-In Email.

Finally, give your customers the opportunity to subscribe to your marketing campaigns. For more information, see Sending Subscription Messages.

How Customers Opt In to Marketing Campaigns

Customers, vendors, partners, and employees can receive email you generate in bulk through campaigns or email merge operations. The messages they receive depend on their global subscription status. For more information on global subscription statuses, see Subscription Management.

The Campaign Subscription Categories feature permits customers to subscribe to some kinds of communication, and avoid receiving email they do not want. Your account administrator can enable this feature at Setup > Company > Setup Tasks > Enable Features. For more information, see Campaign Subscription Categories.

> **Important:** **When someone has unsubscribed, no one in your company can resubscribe them.** This includes updates made via CSV import as well as manual changes to the entity's record. Only the recipient can choose to resubscribe.

Entities can opt in to your campaign email through one of the following ways:

- **Through opt-in email**

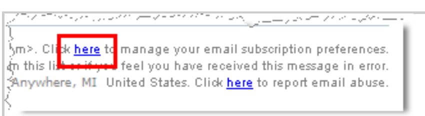
  You can send email messages to invite entities to change their subscriptions. You can either click the Send Subscription Email link or you can use a mass update. For more information, see Opt-In Email.
- **Opting-in through the Campaign Subscription Center**

  Email recipients can change their subscription settings in the Customer Center, Partner Center, Advanced Partner Center, or Vendor Center.

  In the Settings portlet, an entity can click the Campaign Subscription Center link. If the Campaign Subscription Categories feature is enabled, entities can choose the subscription categories they want to subscribe to or check the box at the bottom of the page to unsubscribe to all bulk email communication.

  If the Campaign Subscription Categories feature is not enabled, an entity can check the box to unsubscribe to all bulk email communication.
- **Clicking the Opt-In link in the footer of an email campaign message**

  Every email message you send includes a link your customers can click to set their email preferences. Clicking this link opens the Campaign Subscription Center.

  You cannot change the text of the unsubscribe message, but you can change the formatting of the text to match your template. To format the text, go to Setup > Marketing > Marketing Preferences and choose the font, font size, and text alignment you want to apply to the footer text.

> **Note:** If an entity unsubscribes to your campaigns, any entity record in your account with that entity's email address is also unsubscribed.

Opt-In Email

There are two subscription messages you can send to your customers to allow them to set their email preferences: **opt-in confirmation email** and **opt-in invitation email**. These email do not count against your monthly email allotment.

> **Note:** You cannot send opt-in email to recipients who have the Confirmed Opt-Out subscription status.

Opt-In Invitation Email

Opt-in invitation email is used to invite customers to set their subscription preferences, if they have not done so in the past.

If you have enabled the Multi-Language feature, the default invitation email is available in all languages supported by NetSuite. Customers receive the email in their preferred language.

You can customize the email by modifying the default email template or by creating a new email template. See the help topic Customizing Templates for System-Automated Email for instructions on how to do this.

To choose an email template as the invitation email, go to and select it from the Opt-In Invitation Message list.

Opt-In Confirmation Email

You can send confirmation email to customers allowing them to confirm their current subscription status. Rather than sending a more generic message, this email specifically provides an opportunity for your customers to reaffirm their desire to receive your email. Sending opt-in confirmation messages is a good way to assure your customers that you are committed to sending them only the email they want to receive.

If you have enabled the Multi-Language feature, the default confirmation email is available in all languages supported by NetSuite. Customers receive the email in their preferred language.

You can customize the email by modifying the default email template or by creating a new email template. See the help topic Customizing Templates for System-Automated Email for instructions on how to do this.

To use a new email template you have created as the confirmation email, go to and select it from the Opt-In Confirmation Message list.

Sending Subscription Messages

You can send subscription messages in two ways:

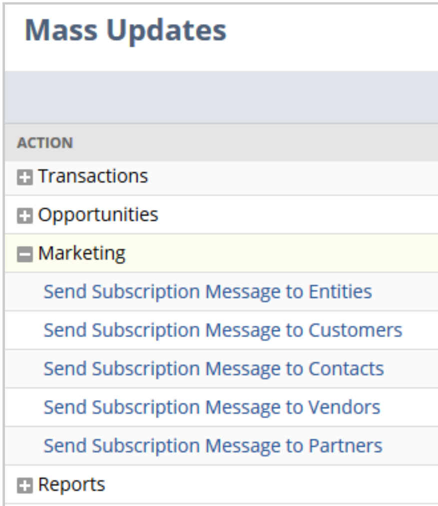
- To a large group of recipients
- To individual recipients

Avoid sending subscription email repeatedly as the recipients may consider it spam. Certain jurisdictions, such as the EU, have regulations regarding whether or not you can contact entities if you do not have their explicit permission to do so. You should ensure that your use of subscription messages adheres to the regulations in the relevant jurisdiction.

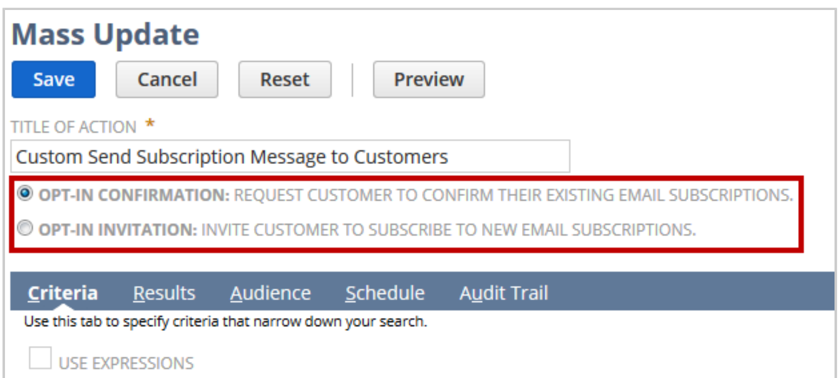
To send subscription messages to a group of recipients:

1. Go to Lists > Mass Updates > Mass Updates.

2. Under Marketing, click the link for the type of recipient you want to send to.



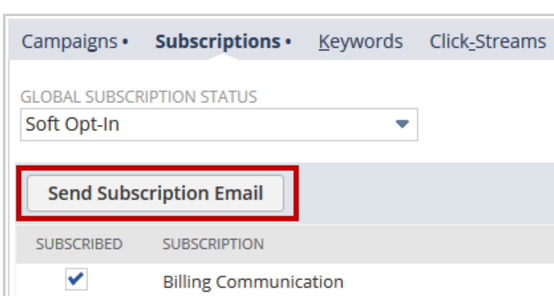
3. On the Mass Update page, select the type of message.



4. Set the criteria for the recipients you want to receive your invitations and Save. Your messages are sent.

To send subscription messages to an individual:

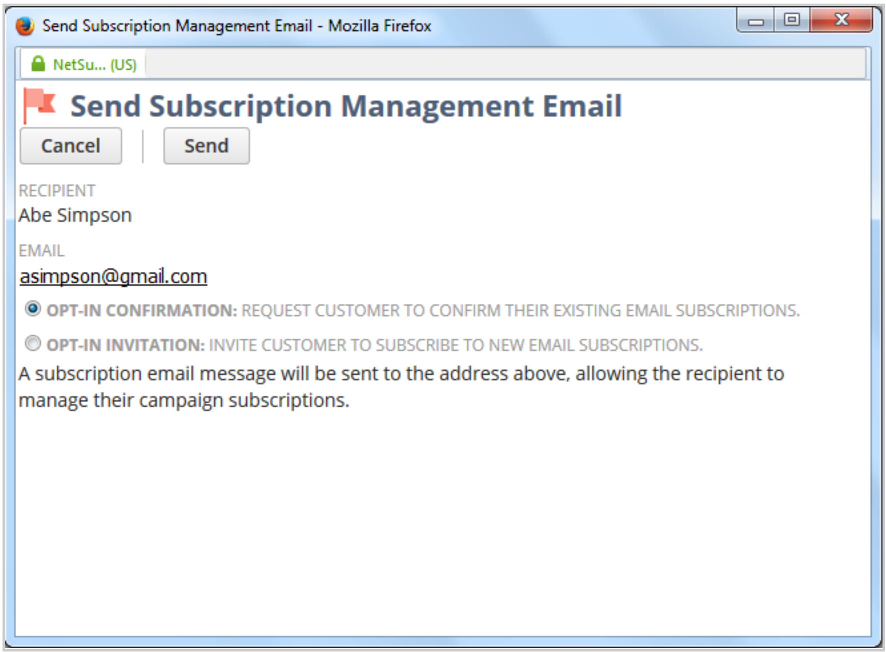
1. Open the recipient's record in Edit mode.
2. Click the Marketing tab
3. If you are:
   - Using the Subscription Categories feature, click the Send Subscription Email button on the Subscriptions subtab.



- Not using the Subscription Categories feature, click the Send Subscription Email link next to the Global Subscription Status field.

> **Note:** The recipient must have an email address for you to be able to send subscription email.

4. When you click the link (or button), you are prompted to choose the type of message you would like to send.



5. Click Send to send the message.

Campaign Subscription Categories

With the Campaign Subscription Categories feature, customers and others with whom you communicate via bulk email can choose which types of campaign communication they want to receive.

When you enable this feature, you can create your own campaign subscription categories in addition to the following default subscription categories: Billing Communication, Marketing, Newsletters, Product Updates, and Surveys. By logging in to the Campaign Subscription Center, recipients can choose which subscriptions they want.

With this feature, the Subscription field on campaign events is mandatory. You can associate subscriptions with marketing and email templates so that when you select a template on a campaign or in an email merge, this subscription category is set by default. Email is only sent to the recipient group members with the subscription set on the event.

The Subscription subtab on customer, contact, partner, vendor, and employee records shows the subscription status for each subscription category.

To create a new subscription category:

1. Go to Setup > Sales & Marketing Automation > Campaign Subscriptions > New.

2. Enter the name of this subscription category and a description.
3. Check the **Subscribed by Default** box if you want new and existing records to be subscribed to this campaign subscription.

   Entities must manually subscribe to subscriptions that they are unsubscribed to.
4. In the **External Name** field enter the name of this subscription category as you want it to appear in the Campaign Subscription Center.
5. In the **External Description** field, enter the description of this category that you want to show in the Campaign Subscription Center.
6. Click **Save**.

Campaign Email Domains

If you intend to send more than 100,000 email messages through marketing campaigns within a 30 day period, you must set up a campaign domain. Similarly, if you intend to send out more than 10,000 email messages in any single campaign event (blast) you must also set up a campaign domain.

For more information on domains and your website, read the following:

- Link your Domain Name with your NetSuite Domain
- Set Up a Web Store Domain
- Campaign Email Limits

When you set up a campaign email domain, all links and other references to **netsuite.com** that might appear in the email campaigns you send are instead replaced with your domain.

> **Important:** Even if you do not host your web store with NetSuite, you should not use your web store or site domain as your email domain.

> **Note:** Setting up a campaign email domain is a separate process from setting up DKIM. For information on DKIM, see DomainKeys Identified Mail (DKIM).

To ensure that the links in your email work properly, your sender domain matches the domain in your links, and tracking pixels return responses, you must first point your email domain name at NetSuite.

To set up a campaign email domain, you must configure Domain Name System (DNS) settings to point your email domain name to hosting servers at NetSuite. Your domain provider can redirect your email domain using a CNAME record (Canonical Name record). This approach designates your email domain as an alias of the NetSuite hosting domain name assigned to your account. The CNAME (Alias) domain is used by NetSuite whenever a secure (HTTPS) connection is **not** required, for example with website hosting and email campaigns.

To set up your email domain name in NetSuite:

1. Go to Setup > Site Builder/SuiteCommerceAdvanced > Domains.
2. In the **Domain Name** column, enter the domain name you have registered for sending campaign email messages.
3. In the **Hosted As** column, select **Email Campaign**.
4. Click **Add**.

5. Repeat these steps for each email domain you want to add.
6. Click **Save**.

> **Warning:** After creating a new domain or updating an existing domain, you must wait 2 hours before configuring DNS settings with your domain provider. For more information, see the help topic Link your Domain Name with your NetSuite Domain.

7. After waiting two hours, go back to the Domain Setup page and copy the **CNAME (Alias)** assigned to you by NetSuite. You will use this CNAME to complete DNS setup with your domain name provider.

   Go to Setup > Site Builder > Domains. If you use SuiteCommerce Advanced, go to Setup > SuiteCommerce Advanced > Domains.

   > **Note:** Each time you add or edit a domain name in NetSuite, the CNAME (Alias) displayed for that domain changes. You must configure DNS settings with your domain provider to point your domain name to the correct CNAME (Alias).

8. (Required) Visit your domain provider's website to complete the task of setting up a CNAME record. For more information, see the help topic Set Up a CNAME Record.
9. Finally, select the campaign domain on the **Marketing** subtab of your email template or campaign template records. You can set a default domain for your templates in the **Default Campaign Domain** field at Setup > Marketing > Set Up Web Site.

After you have set up your domain names in NetSuite, and configured DNS settings with your domain provider, your domains should begin redirecting. **The time frame for domain redirecting depends on your DNS provider. Generally, this process takes between 2 to 48 hours.**

In addition to email domains, you can also upload your own email domain keys to increase your delivery rates. For more information, see DomainKeys Identified Mail (DKIM).

DomainKeys Identified Mail (DKIM)

To protect customers from unsolicited email, many ISPs check the domain key used in an email message to determine whether it is spam or not. DomainKeys Identified Mail (DKIM) is a method of digitally signing your email to allow its authentication.

When sending email from NetSuite, using your own domain key increases campaign delivery rates and help enhance your reputation as a legitimate marketer. Without DKIM, you cannot send more than 10,000 messages in a single email campaign.

When set up, your domain keys will be used to authenticate all email sent from NetSuite.

> **Note:** For campaigns and bulk email, if you set up multiple domain keys NetSuite will automatically select the best possible key based on the sender's domain. For more information, see Campaign Email Domains.

From Headers in Emails Can Be Rewritten

If you do not complete the Procedures to Set Up DKIM, by default, the From header on emails you send from NetSuite will be rewritten. When the From header is rewritten, the original email address is moved to the display string, and the SMTP-related email address refers to netsuite.com. For example, an email from `jsmith@example.com` would be rewritten to `jsmith@example.com <sent-via.netsuite.com>`. What your recipients will see as the sender of the email depends on the email client in use at the recipient's site. Some recipients will see the original email address with the modified <sent-via.netsuite.com> From header. Some recipients will not see the original email address at all.

Procedures to Set Up DKIM

The following procedures contain instructions for setting up Domain Keys in NetSuite and with your domain provider. These procedures should be performed by someone with DNS experience.

To enter Domain Keys in your NetSuite account:

1. Go to Setup > Company > Email > Email Preferences.
2. Click the **Domain Keys** subtab.
3. In the **Domain Selector** field, enter the first domain selector. You can name the selector anything you want, but it is recommended that you incorporate the current date in the selector name so that you know the age of each key.

   > **Note:** When you set up your domain name with your domain provider, you will enter the same domain selector along with the **._domainkey** suffix.
   >
   > For example, if you enter **selector1** in this field in NetSuite, you would enter **selector1._domainkey** as the domain selector with your domain provider.

4. In the **Domain Name** field, enter the domain name you are using to send DKIM signed emails from NetSuite. For example, if the email address from which you are sending DKIM signed email is jwolfe@wolfeelectronics.com, the domain is wolfeelectronics.com. An email address from this domain can appear in the From header.
5. Enter the **Private** and **Public** domain keys used for signing in one of the following ways:
   - If you have used the same domain with another application, enter the domain keys manually.
   - If you have not generated a domain key for this domain previously, click the **Generate Key Pairs** link to have NetSuite generate them for you.

   You need the public domain key to set up your domain with a domain hosting service.
6. After entering the domain keys, click **DNS Entry**. Your complete, properly formatted DNS entry is shown in a popup window. Copy this DNS entry. Do not close the browser window.
7. Complete the following procedure to set up a DNS text record with your domain provider.

To set up a DNS text record with your domain provider:

> **Important:** Complete the following procedure within 14 days after completing the previous procedure in NetSuite. If this procedure is not completed within 14 days, the From header of email sent from that particular domain will continue to be rewritten. For more information, see From Headers in Emails Can Be Rewritten.

1. Open another browser window, and log in to your domain provider.
2. Add a text record with a name in the following format:

   selector1._domainkey

   That is, use the selector name you entered in NetSuite, followed by the **._domainkey** suffix.

3. Paste or enter the value you copied after clicking the DNS Entry link in your NetSuite account.
4. Save the text record.

> **Note:** Create a separate text record for each domain you plan on creating domain keys for. With different domain selectors, each text record can be used to create multiple keys but only for a single domain.

> **Tip:** Consider setting up a DMARC policy record for your company's entire email infrastructure. See Domain-based Message Authentication, Reporting and Conformance (DMARC).

5. Complete the following procedure to activate the keys you set up in NetSuite.

To activate DKIM keys in your NetSuite account:

1. Back in your NetSuite account on the Email Preferences page, check the **Active** box for each key you have set up.
2. Click **Save**. All outgoing email messages sent from NetSuite using the selected keys will have a DKIM header.

   This code header contains the domain key information but does not add any text to your messages.

After setting up your domain with your provider, you can test your DKIM setup. For more information, see DKIM Setup Verification.

> **Note:** You must set up DKIM in NetSuite and publish DNS DKIM records with your domain provider for email messages to be recognized as DMARC-compliant. You should also consider publishing a DNS DMARC policy record with your domain provider. See the help topic Creating DMARC-compliant messaging in NetSuite.

DKIM Setup Verification

You can verify that your domain keys are properly set up before attempting to use them in marketing campaigns or in other email communication. You can also perform more extensive testing by sending a test message and receiving a report on your DKIM setup.

After you have entered your domain information in NetSuite and added the appropriate DNS entries with domain provider, go to Setup > Company > Email > Email Preferences. On the **Domain Keys** subtab, select the domain key you want to verify and click **Verify DNS Entry**.

NetSuite checks to make sure the public domain key in the DNS record matches the public domain key entered in NetSuite. The results of the test are displayed in a popup window.

Possible results from this test include the following:

Result	Details
Your DNS entry for DKIM has successfully been verified.	The DNS entry has been validated. You can use this domain name in an email campaign or email merge operation.
You need to enter a valid selector, domain name and	Make sure you have entered the selector, domain name and public key properly in your NetSuite account.

Result	Details
public key to perform this operation.	
There are errors in your DNS entry for DKIM.	This error is followed by specific details about why the test failed. For example, if the public key in your domain settings does not match the public key in your NetSuite account, the test result presents the erroneous key as well as the correct key. Update the public key in the DNS entry in your domain settings to correct this problem.
Your DNS DKIM entry could not be read.	Your DNS entry has not been entered correctly. Please make sure the DNS entry has been properly set up with your domain provider.

If you receive a message that your DNS entry for DKIM has been verified, click **Send Test Email to DKIM Reflector** to send a test email message. A DKIM reflector is a service set up to receive and analyze email. This reflector then forwards a report on your domain key setup. The report is sent to the address shown in the **Email Address to Receive Test Response** field.

Creating a Campaign Email Address Record

Campaign email addresses can appear in the From field of your marketing email and can receive replies to your marketing email.

Before sending email campaign events, you must validate the email address you want to use.

To create a campaign email address record:

1. Go to Setup > Sales & Marketing Automation > Email Addresses > New.
2. On the Campaign Email Address page, enter the email address you want to use.
3. If you check the **Private** box, only the person that entered this campaign email address record can:
   - view this email address record
   - assign this email address to email templates
4. Click **Save**.

When an email record is saved, an authorization code is sent to the email address. Before you can use this email address, you must enter the authorization code in the campaign email address record.

To validate an email address:

1. Go to Setup > Sales & Marketing Automation > Email Addresses.
2. Click **Edit** next to the email address you want to validate.
3. In the **Authentication Code** field, enter the code that was included in the email that was sent when the record was created.
4. Click **Save**.

When an email address has been validated, it can be selected on campaign email templates to serve as the From address, the Reply to address or both.

When you have created a target group, uploaded an email template and validated your marketing email addresses, you can create email marketing campaigns.

For more information on creating email campaign templates, read Email Marketing Templates.

Marketing Templates

You can create marketing templates for:

- **Email campaigns and online form notification** – customize the email you send in your marketing campaign or automatically send to people who submit your online forms
- **Online forms** – create custom templates that determine the look and arrangement of your online forms.

Email marketing templates are HTML documents that you can select to send marketing campaigns to groups. You can also use marketing templates to automatically send confirmation email to those who submit your online customer forms. For more information on creating email marketing templates, read Email Marketing Templates.

Online form templates are HTML documents that can create outside of NetSuite and then upload to your NetSuite file cabinet for use with your online forms. For more information on creating online form templates, see the help topic Online Form Templates.

You can personalize your templates with information from customer, vendor, partner, employee, or contact records. For example, you might want to have the name of your customers included in the greeting of your monthly newsletter. Email campaign templates can be created as scriptable templates. For more information, see the help topic Scriptable Templates.

Email Marketing Templates

Email marketing templates are HTML files used to generate campaign email. You can create these templates in an HTML editor outside of NetSuite, or you can use the Rich Text Editor on the template record.

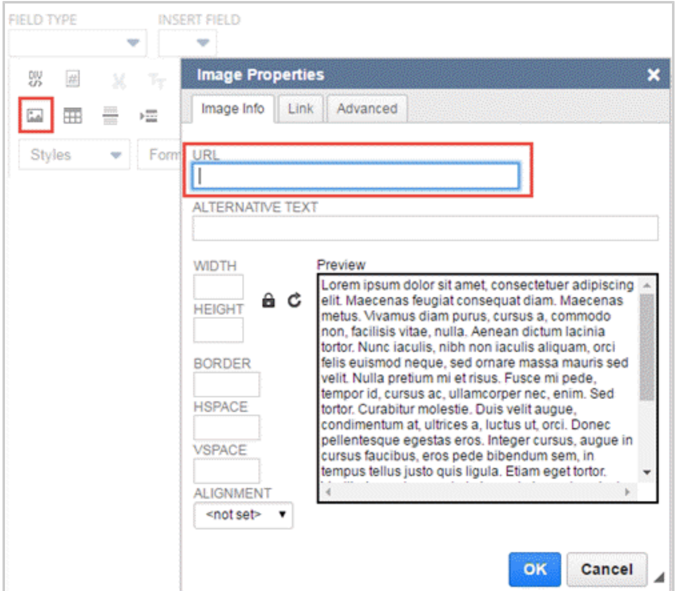
If you create your marketing template outside of NetSuite, you must include the following HTML elements in your template:

- `<html>` and `</html>` tags
- `<body>` and `</body>` tags at the beginning and end of the message
- All end tags, such as `</p>` and `</li>`

Images in your template can be stored in your NetSuite file cabinet. When using an image file in a template, make sure the Available Without Login box is checked on the File record.

To insert images from the file cabinet into email templates:

1. Go to Documents > Files > File Cabinet and open the folder containing the required image.
2. Click **Edit** next to the image you want to use in the email template.
3. Copy the URL of the image file. If there is more than one listed, copy the one which begins **https://system**.
4. On the Email Template (Scriptable) form, position where you want the image to appear using the WYSIWYG editor.

5. 

Click the **Picture** icon on the editor. Paste the URL of the image into the **URL** field of the **Image Properties** box.
6. Click **OK**. The image will now be inserted into the template.
7. When you have finished formatting your template, click **Save**.

Scriptable templates enable you to insert personalized information in the body of your email templates through the use of Freemarker code. For more information, see the help topic Scriptable Templates.

The following is an example of a campaign email template that uses Freemarker code.

```
<b>Dear <#if Customer.companyName != "">${Customer.companyName}<#else>Customer</#if>,</b>

<p>Now you have unique opportunity to get your favorite items with 20% discount!</p>

<p>All you need to do is to use the following coupon code when you place an order on our site:
${CampaignEvent.couponCode}!</p>

<#assign printedOutItems = 0>
<#list Customer.correlatedItems as itemLine>
  <#if 33 < itemLine.correlation>
    <img src="${itemLine.upsellItem.imageURL}" alt="${itemLine.upsellItem.displayName}" height=
"128" width="128"/><br/>
  </#if>
  <#assign printedOutItems = printedOutItems + 1>
  <#if printedOutItems = 3><#break></#if>
</#list>
<#if 3 < printedOutItems>
  <#list Customer.relatedItems as itemLine>
    <img src="${itemLine.upsellItem.imageURL}" alt="${itemLine.upsellItem.displayName}" height=
"128" width="128"/><br/>
    <#assign printedOutItems = printedOutItems + 1>
    <#if printedOutItems = 3><#break></#if>
  </#list>
</#if>
```

```
<p>
  Best regards,<br/>
  <br/>
  ${preferences.MESSAGE_SIGNATURE}
</p>
```

If you compose your email template using NetSuite Rich Text Editor, you can choose fields from the Insert Field list.

Campaign email templates are HTML documents that you attach to email marketing campaign events. On the delivery date for the campaign event, the campaign email template is used to generate the email you send to the target group.

With campaign email templates, you can:

- Generate auto-reply email sent to people who submit online forms
- Create campaign email templates outside of NetSuite and upload them into your NetSuite File Cabinet
- Personalize your email templates with Freemarker code that uses information from NetSuite records

  For example, you might want to have the name of your customers included in the greeting of your monthly newsletter or include personalized upsell items in a promotional email message.

When you create an campaign email template, the fields used must match the record type of the members of your target group. If you include a field that does not refer to a field in the recipient's record, nothing is entered in the message where that field is located. For example, if you inserted a field that referred to the Salutation field in a message to one of your customers, the salutation does not appear because the customer record has no Salutation field.

Additionally, if the kind of record referenced in a campaign email template does not match the group you are targeting with your marketing campaign, the group does not appear in the group column of campaign records.

> **Note:** HTML documents uploaded to your file cabinet must included appropriate end tags to be recognized as an HTML files.

If you send more than 10,000 email per marketing campaign or email merge operation, you must set up a campaign domain and DKIM. For more information, see Campaign Email Domains and DomainKeys Identified Mail (DKIM).

Before you create an email template, you need to create campaign email address records. Only validated email addresses can be used in your email marketing campaigns. For more information, see Creating a Campaign Email Address Record.

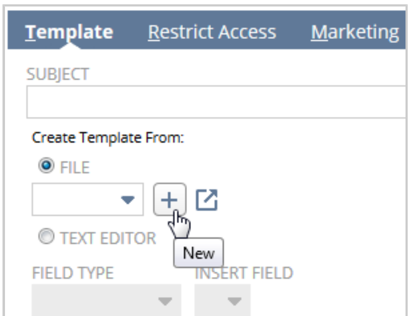
To create a marketing email template:

1. Go to Documents > Templates > Marketing Templates > New.
2. On the Select Type page, click **Campaign**.
3. Select the template layout you want to use to design your template.
4. On the New Campaign Email Template page, enter a name for this template.
5. Enter a description of this template.
6. To send a preview of the email template, check the **Send Email Preview** box, and enter the email address to which you want to send a preview.

Template Subtab

On the **Template** subtab, you can either upload a file you have prepared outside of NetSuite, or you can create the template with the text editing options in the **Template** field.

1. In the **Subject** field, enter a subject for the email you send with this template.
2. Do one of the following:
   - Select **File** if you have created the template beforehand, and select the template file in the list. You can also click **New** if you have not already uploaded your template file to your file cabinet.

   - Select **Text Editor** if you have not yet created your template, and compose your template in the rich text field.

     To insert a field in the template, select the record type in the Field Type list, and select a field in the **Insert Field** list.

> **Note:** If you use the UK Edition, to comply with UK law, your business address and VAT number are included in the footer of all email you send to those outside of your company..

Restrict Access Subtab

1. Check the **Private** box if you do not want others in your company to use this template.
2. If you want this template to be used only by members of a specific group, select that group in the **Restrict to Group** field.

Marketing Subtab

> **Note:** The fields shown on the Marketing subtab are determined by the features you have enabled.

1. In the **From Name** field, enter the name you want to appear in the **From** field on email messages you send with this template.
2. In the **From Email** address field, select a validated email address to appear in the **From** field of your marketing email.
3. In the **Reply to Email** address field, select a validated email address to receive responses to your marketing email.

   You can create and validate email address records at Setup > Campaign Email Addresses > New.
4. Check the **Email as Sales Rep** box if you want replies to the email generated by this template to be sent to the sales rep assigned to customer recipients.

If you check this box, each campaign email shows the nickname and From email address entered by the rep at Home > Set Preferences > General under the User Profile heading. If the rep does not have a profile set up, the marketing email address and From name entered on the template record are used.

> **Note:** This setting overrides the reply to email address set in the **Reply To Email** Address field.

5. In the **Campaign Domain** field, select the campaign domain you want to use for this template.

   For more information, see Campaign Email Domains.
6. In the **Subscription** field, select the category of campaign subscription that this email template is used for.

   When you select this template for an email merge or a marketing campaign, this campaign subscription is chosen by default. For more information, see Campaign Subscription Categories.
7. If you want to track statistics related to how often this email message is opened or clicked through, check the **Track Outgoing Email** box.

   If you choose to track marketing email statistics, whenever a recipient of your marketing email opens or clicks through a message, a request is sent to NetSuite's server. Some of your marketing email recipients may have concerns about this process that you may want to address in your company's privacy policy.

   > **Note:** Only links to pages in NetSuite are tracked as having been clicked for campaign response reporting. For example, a link to a page in your NetSuite Web site or an online customer form would be tracked, but a link to a third-party site would not be tracked.

   These tracking statistics are included in such reports as the Campaign Statistics Summary and Detail.

Categories Subtab

This subtab appears only if you have enabled the CRM Template Categories feature. Template categories enable you to organize templates. You can create new categories at Documents > Templates > Template Categories > New..

1. Click the **Categories** subtab.
2. In the **Template Category** column, select the category you want to organize this template into.
3. Click **Add**.
4. Repeat these steps for each category you want to organize this template into. A template can be in any number of categories.
5. Click **Save**.

Now, you can select this campaign email template on campaign records. For more information on creating email campaigns, read Creating an Email Marketing Campaign.

Creating an Email Marketing Campaign

Email marketing campaigns are used to generate email messages you send as part of a marketing effort.

To create an email marketing campaign:

1. Go to Campaigns > Marketing > Marketing Campaigns > New.
2. Under Primary Information:
    1. If you use custom forms, you can select a custom campaign form.
    2. Enter an ID for this campaign in one of the following ways:

       If you use auto-generated numbers for campaigns, an ID is generated automatically.

       If you do not use auto-generated numbers for campaigns, enter an ID.

       Campaign IDs can be used to more easily identify campaigns, especially in the event that campaigns share similar names.

       > **Note:** Additionally, campaign IDs can be used when passing lead source information into online customer forms.
    3. Enter a title for this campaign.

       You can enter up to 99 characters in this field.
    4. Select the category this campaign belongs in.
    5. Select a campaign manager for this campaign.

       The campaign manager receives confirmation that email campaign events have been sent.
    6. Enter or pick the start date and end date for this campaign.
    7. In the **Base Cost** field, enter the cost of this campaign apart from the cost of any specific campaign events.

       The **Total Cost** field shows the sum of the cost of any campaign events and the base cost.
    8. Enter the URL for the campaign landing page or online customer form associated with this campaign.

       You can enter the cost of specific events on the **Events** subtab.
    9. In the **Expected Revenue** field, enter the amount of revenue you expect this campaign to generate.
3. Under the **Events** subtab, click the **Email** subtab.
4. In the **Target Group** column, select the group that receives the campaign email.
5. If you want to test this mailing by sending it to only a portion of this group, select the test cell you want to send it to.

   For more information, see Marketing Test Cells.
6. Select a template category in the **Template Category** column to filter the list of email templates to that category.

   This field is only available if you have enabled the CRM Template Categories feature.
7. Select the template for the email you are sending in the **Email Template** column.
8. Enter a title for this campaign event.
9. In the **Subscription** column, the subscription category for the template you are using is chosen by default. Only recipients that have this subscription receive this campaign event. For more information, see Campaign Subscription Categories.
10. Enter the cost incurred by this campaign event.
11. In the **Status** column, select the status of the campaign event.

    If you select **Execute** for an email campaign event, NetSuite will send your email on the date and time you set in the **Delivery Date** and **Delivery Time** fields.

12. Select the date and time you want this campaign event to occur.
13. If you want to associate a promotion with this campaign event, select it in the **Promotion** column.
14. Click **Add/Edit**.
15. Repeat these steps for each event for this email campaign.
16. Click **Save**.

NetSuite automatically deletes duplicate messages to ensure that each email address only receives one copy of the campaign email you send.

After you save a campaign record, you can view additional subtabs on that record. Go to Campaigns > Marketing > Marketing Campaigns. Click the name of the campaign you want to view. You can view statistics on what recipients did with email messages, add notes to the campaign record and attach file cabinet documents.

Your Campaign Calendar keeps track of your campaign events. To view your campaign calendar, go to Campaigns > Marketing > Campaign Calendar.

Only customers that have not unsubscribed to your marketing campaigns can receive marketing email. Every email message you send includes an "Unsubscribe" link your customers can click to automatically unsubscribe to your email marketing campaigns.

Handling of Spam When Notified by Mail Service Providers

NetSuite supports **Complaint Feedback Loop** by which mail service providers notify NetSuite when a campaign email was marked as spam by a recipient. NetSuite automatically unsubscribes the recipient from their marketing subscription preferences and sets their global subscription status to **Confirmed Opt-Out**. The unsubscribed recipient no longer receives email campaigns, which keeps the complaint rate per domain low, increasing the likelihood of MSP's delivering your messages to the inbox of your customers. Customers can also opt-out by clicking the unsubscribe link provided in the email.

For more information on creating email marketing templates, read Email Marketing Templates.

Creating Email Campaigns Using the Campaign Assistant

Campaign Assistant is a free SuiteApp that consolidates all the necessary forms you need to create an email campaign. The application lets you go through all the required steps to ensure that you do not leave out any important information for your campaign event.

Read the following help topics to learn more about Campaign Assistant:

- Setting Up Campaign Assistant
- Creating Email Campaigns

Setting Up Campaign Assistant

Prerequisites

Before you install Campaign Assistant, make sure that you have enabled the Marketing Automation feature. Go to Setup > Company > Enable Features and click the **CRM** subtab to enable this feature.

Installation

To install the Campaign Assistant SuiteApp:

1. Go to Setup > Company > Enable Features.
2. Click the **CRM** subtab.
3. Under the **Basic Features** section, click the **Campaign Assistant** link.
4. On the SuiteApp Details page, click **Install**.

Roles and Permissions

The SuiteApp will be accessible to the following roles upon installation:

- Marketing Administrator
- Marketing Assistant
- Marketing Manager

You need to configure the following permissions for a role to fully access the application.

Navigation	Permission	Level
Permission > Lists	CRM Groups	Full or Create
	Marketing Campaigns	Full or Create
	Marketing Template	Full or Create

Creating Email Campaigns

To start creating email campaigns using Campaign Assistant, go to Lists > Marketing > Create Email Campaigns.

Step 1: Entering Campaign Details

To enter campaign details:

1. In the Primary Information section, enter values for the following fields:
   - **Title** – Enter a title for this campaign.

     You can enter up to 99 characters in this field.
   - **Category** – Select a category for this campaign.

     You can create new campaign categories at Setup > Marketing > Campaign Management > Categories > New. For more information, see Campaign Categories.
   - **Manager** – Select a campaign manager.

     The campaign manager receives confirmation when email campaign events have been sent.
   - **Start Date** – Enter or select a start date for this campaign.
   - **End Date** – Enter or select an end date for this campaign.

- **Base Cost** – Enter the cost of this campaign apart from the cost of any specific campaign events.
- **Expected Revenue** – Enter the amount of revenue you expect this campaign to generate.
- **URL** – Enter the campaign landing page or online customer form associated with this campaign.
- **Description** – Enter a description for this campaign.

2. In the Related Information section, enter values for the following fields:
   - **Vertical** – Select a marketing vertical related to this campaign.

     For more information, see the help topic Campaign Verticals.
   - **Promotion Code** – Select a promotion to offer with your campaign.

     You can enable promotion codes at Setup > Company > Enable Features. Click the **Transactions** tab, then check the **Promotion Codes** box under the Sales subfield.

     You can create new promotion codes at List > Marketing > Promotions > New. For more information, see the help topic Promotion Code.
   - **Audience Description** – Select your audience for this campaign.
   - **Offer** – Select an offer that you want to associate to this campaign.

     You can create new offers at Setup > Sales > Setup Tasks > CRM Lists > New. For more information, see the help topic Campaign Offers.
   - **Item** – Select the items associated with this marketing campaign.

     You can create new items at Lists > Accounting > Items > New.
3. Click **Next** to define the target group for this campaign event.

Step 2: Selecting the Event Target Group Type

You can choose to use an existing target group or to create a new target group.

To create a target group:

1. Choose the type of group you want to create:
   - **Static** – You need to add specific group members for this type of group. The membership of static groups does not change automatically, but you can add or remove members at any time. You can add members for static groups in the Group Member section.
   - **Dynamic** – This type of group automatically updates group membership based on a saved search criteria. You cannot add or remove individual members, but you can change the search criteria.
2. Select the type of members you want to include in this target group from the list.

   > **Note:** If you do not use the **Partner Relationship Management** feature, the Partner member type will not appear in the list. Go to Setup > Company > Enable Features and click the **CRM** subtab to enable this feature.
3. If you are creating a dynamic group, select an existing saved search from the list or select **New** to create new search criteria for the target group.

   When a saved search has been created or selected, the criteria used to filter saved search records will be displayed under the **Criteria Details** section.

   You can edit an existing saved search's criteria and save the changes. You can also save the modified saved search as a new saved search.

> **Note:** The saved search you created will automatically be available for selection in the existing saved search list as soon as it has been saved.

4. Click **Next** to define the target group for this campaign event.

Step 3: Selecting the Event Target Group

If you chose to use an existing group in the previous step, select a group from the list. The group properties, member type, and group members will display when you have made your selection.

If you chose to create a target group in the previous step, the group type and member type you selected is displayed in the Create Target Group section.

If you chose to create a dynamic target group in the previous step, the saved search you created or selected will display its results in the Create Target Group section. These results will form the members of your dynamic group.

To create a target group:

1. In the Create Target Group section, enter values for the following fields:
   - **Group Name** – Enter a name for this target group. You can enter up to 25 characters in this field.
   - **Owner** – Select the owner of this target group. By default, the person creating the group is the owner.
   - **Email** – If this group shares an email alias, enter the email address in this field.
   - **Comments** – Enter a description for the group in this field.
   - **Private** – Check this box if you want to be the only one to use this group.
   - **Restrict To** – Select the group that you want to have access to this group.

     For example, you can select a group of marketing reps in this field to make this group available only to those reps.
2. If you chose to create a static target group, in the Group Member section, select the members you would like to add to the target group.
3. Click **Add** after selecting each member.

   To delete a member, click the **x** found on the right side.
4. Click **Next** to select an event template for this campaign.

   > **Note:** The target group you created will automatically be saved when you click **Next**. This group will then be available for selection in the existing target group list.

Step 4: Selecting an Event Template

You can select an existing event template from the list or select **New** to create a new template.

> **Note:** Campaign Assistant uses a different text editor from standard NetSuite templates. However, if you choose to use an existing template in your campaign, you will still be able to view and use them in Campaign Assistant.

To create an event template:

1. Select **New** from the Template list.

2. In the Create Campaign Email Template section, enter values for the following fields:
   - **Name** – Enter a name for this template
   - **Description** – Enter a description for this template.
3. In the Template Information section, enter values for the following fields:
   - **Subject** – Enter a subject for the email that you will send with this template.
   - **Create Template From** – Select from the following options:
     - **File** – Select this option if you have created the template beforehand. Select the template file in the list or click **New** if you have not uploaded your template to the file cabinet.
     - **Text Editor** – Select this option if you want to compose your template.
   - **Private** – Check this box if you do not want others to use this template.
   - **Restrict To Group** – Select the group that can use the template exclusively.
   - **From Name** – Enter the name that you want to appear in the **From** field on email messages you send with this template.
   - **From Email Address** – Select a validated email address to appear in the **From** field of your marketing email.
   - **Reply To Email Address** – Select a validated email address where you want to receive responses to your marketing email.
   - **Email as Sales Rep** – Check this box if you want replies to emails generated by this template sent to the sales representative assigned to customer recipients

     > **Note:** **Email as Sales Rep** overrides the **Reply To Email Address** setting.

   - **Campaign Domain** – Select the campaign domain that you want to use for this template.

     For more information, see Campaign Email Domains.
   - **Track Outgoing Email** – Check this box to track statistics related to how often this email message is opened or clicked.
4. Click **Next** to enter the event and schedule details for this campaign.

Step 5: Entering Event and Schedule Details

To enter event and schedule details:

1. In the Event Information section, enter values for the following fields:
   - **Title** – Enter a title for this campaign event.
   - **Cost** – Enter the cost incurred by this campaign event.

     Entering a cost lets you track return on investment (ROI) for the campaign.
2. In the Schedule Information section, enter values for the following fields:
   - **Status** – Select the status of the campaign event. If you select **Execute** for an email campaign event, NetSuite will send your email on the date and time you set.

     > **Note:** You cannot change the time of day an email campaign is executed on the day it is scheduled to be delivered.

   - **Date** – Select the date this campaign event will occur.
   - **Time** – Select the time this campaign event will occur.

3. Click **Next** to review the details for this Campaign Event.

Step 6: Reviewing Email Campaign

When you have finished entering information for your campaign event, you can review all the details you entered in the Review Campaign page.

You can add more target groups for the same event under the Campaign Events section. You can select a different template and set a different schedule for additional target groups, however, you cannot create a new target group and template from this section.

After confirming all the information, click **Finish** to create your campaign event.

> **Note:** When you have completed the Campaign Assistant, you will be redirected to a standard marketing page where the campaign you have created is displayed.

Lead Nurturing Campaigns

Lead nurturing campaigns, sometimes referred to as drip marketing campaigns, offer an alternative to traditional email blasts by using a series of targeted messages that are sent based on each lead's response. Lead nurturing campaigns enable you to focus effort on the leads who express interest in your marketing messages, gradually moving them toward becoming customers.

> For example, fictional company Wolfe Electronics sends a webinar invitation to each new lead that is identified as being in the software industry. One day after the lead record is created, an email message is sent using the marketing template Webinar Invitation: “Trends in Internet Security”.

Lead nurturing campaigns can use NetSuite's Workflow Manager and enable you to customize the criteria used to determine who receives each campaign message, the timing of these messages, and the actions or responses that trigger subsequent email.

To see complete steps for creating the lead nurturing campaign example above, see the help topic Lead Nurturing Workflow. Read Configuring Your Lead Nurturing Workflow for help on applying the sample workflow to your own lead nurturing campaigns.

Before creating a lead nurturing workflow, an administrator must first enable the Workflow feature at Setup > Customization > Scripting > Enable Features on the SuiteCloud subtab.

To create a lead nurturing campaign, complete the following steps:

1. Map out how your company's lead nurturing campaigns work. For more information, see Configuring Your Lead Nurturing Workflow.
2. Create the email templates that are used in your lead nurturing campaign. For information, see Creating an Email Marketing Campaign.
3. Create a lead nurturing campaign record. For information, see Creating a Lead Nurturing Campaign
4. Set up a lead nurturing workflow.

   For a detailed sample lead nurturing workflow, see the help topic Lead Nurturing Workflow . Creating workflows requires the Workflow permission.

Configuring Your Lead Nurturing Workflow

Before designing your own workflow, it is recommended that you read the help topics SuiteFlow Overview and carefully map out how your lead nurturing campaigns are currently set up.

Be sure to make a note of:

- which leads you send lead nurturing email to

  This will help you determine the criteria your workflow uses to select recipients.
- how you determine which templates get sent at each point of the lead nurturing campaign

  This information is used to create states and transitions in the workflow.
- how much time should pass before sending out each successive email message

  These delays can be implemented at any point in your workflow in the transitions.

As soon as you have all of this information, you can adapt the procedures for setting up the sample workflow at Lead Nurturing Workflow to your own lead nurturing campaigns.

You can only set up lead nurturing workflows with criteria that reference the campaign responses for lead nurturing campaigns. You cannot set workflow criteria that references the campaign responses for other types of campaign.

Creating a Lead Nurturing Campaign

Each lead nurturing campaign tracks each message sent as a different campaign event on the Lead Nurturing subtab of the campaign record.

Before you create your lead nurturing campaign record, create the marketing templates used for each event. For more information, see Email Marketing Templates.

To create a lead nurturing campaign:

1. Go to Campaigns > Marketing > Marketing Campaigns > New.
2. Under Primary Information, enter the title and other information related to the campaign.
3. Under the **Events** subtab, click the **Lead Nurturing** subtab.
4. In the **Template Category** column, select a category to filter the list of templates to this category.

   This field is available only if you have enabled the **CRM Template Categories** feature.
5. In the **Template** column, choose one of the email marketing templates you want to use in this campaign.

   You can update the email subject in the **Title** column or accept the subject on the template record.
6. If you know the cost of this campaign event, enter it in the **Cost** column. You can update this later.
7. If you are offering a discount through this event, or if you want to track this event with a promotion, select it in the **Promotion** column.
8. Click **Add**.
9. Repeat these steps for each different template used in your lead nurturing campaign.
10. When you have entered all of the templates used in this campaign, click **Save**.

Now, you are ready to set up your lead nurturing workflow. For more information, see the help topic Lead Nurturing Workflow.

Sending Newsletters Through Email Campaigns

If you send email newsletters to your customers, contacts, and others you do business with, you can use email marketing campaigns to track behavior and revenue that results from your communication.

It is possible to use the Mail Merge feature, however, email campaigns offer additional functionality like responses that tell you whether recipients opened your newsletters and if they clicked links in the email. You can also track revenue through the lead source of the newsletter campaign.

Best Practices

To maximize the impact of your newsletter:

- Make sure it displays properly and clearly even if the recipient's email application has blocked images from showing.
- Include only short summaries in the newsletter with links to articles on your NetSuite website.
- Schedule the newsletter to be sent mid-morning on a weekday.

How to Set Up Your Newsletter Campaign

To set up the campaign used to distribute your newsletter:

1. First, choose where you want to host your articles. If you host them on your NetSuite website, they can be shared through social media and indexed by search engines.
2. Create your newsletter with an HTML editor and save it as a Marketing Templates in NetSuite.
3. Create the target group for the newsletter. You might consider sending it to both customers and their contacts. See Creating Target Groups for Campaigns.
4. Create an email campaign with your template and recipient groups. If you send it to both a contact group and a customer group, you will need to schedule two separate email events on the campaign. See Scheduling Campaign Events.
5. Set the time and date for delivery, and set the status of the events to Execute. See Initiating Campaign Events.

You can use campaign reports to refine your marketing based on the results of your campaign. For example, you can remove invalid email addresses (that trigger bounced responses). For more information, see Bounced Email.

You can also use these campaign responses in Lead Nurturing Campaigns (or drip marketing) and have sales reps follow up with clients for upsell opportunities.

Marketing Test Cells

You can divide campaign recipient groups into test cells to help you evaluate the effectiveness of your campaign templates.

You can create a campaign event for each test cell of the recipient group, and choose which template you want that cell to receive. Then, you can view sales and ROI reports to determine which templates are most effective.

To create a marketing test cell:

1. Go to Leads > Relationships > Groups.
2. Click Edit next to the group you want to divide into test cells.
3. Click the **Test Cells** subtab.
4. In the **Name** column, enter a name for a test cell of this group.
5. In the **Percentage** column, enter the percentage of group members you want to be a part of this test cell.
6. Click **Add.**
7. Repeat these steps for each test cell.

   Make sure that the percentages add up to 100%.
8. Click **Save**.

Now, when you create a campaign record, create an event for each test cell in this group.

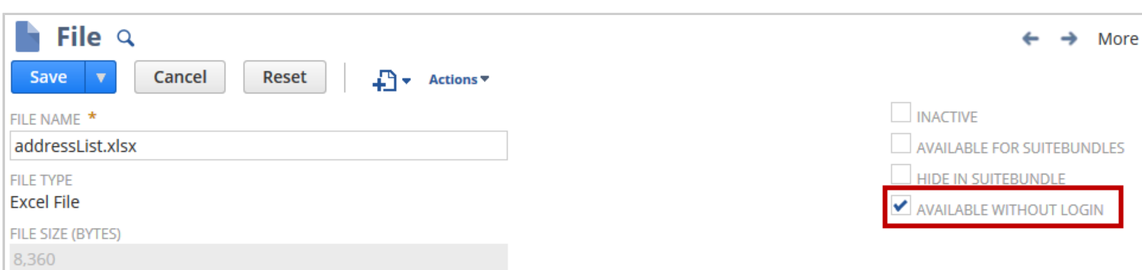
If you do not want to use test cells, clear the Campaign Test Cells box at Setup > Sales & Marketing Automation > Marketing Preferences.

Attaching Files to Email Campaigns

You cannot currently attach files to campaign email, however, you can permit recipients to access files you have saved in your NetSuite file cabinet through links in your campaign email.

> **Note:** Files selected on the Files subtab of your campaign record are not sent as email attachments.

To link to a file, you must first check the Available Without Login box on the file record. This permits anyone with the file's URL to access it.



Next, you can link to this file in the email template you use with your campaign. When a recipient receives your email they can view or save the file with this link.

Another method of providing files through email is to use an email merge operation. With email merges, you can include attachments, but you lose the revenue and lead tracking abilities that are available with campaigns.

Managing Bounced Email

One of the most important ways a marketer can develop a positive sender reputation is by avoiding sending email to invalid email addresses. To help with this, NetSuite tracks when an email message is returned due to invalid address. This is known as a hard bounce.

In addition to keeping track of hard bounced email addresses resulting from email marketing campaigns and mail merge, NetSuite tracks any address that has hard bounced from any email sent from NetSuite including transactional email.

When a message sent to an email address results in a hard bounce, that email address is marked as a hard bounce address. Hard bounced addresses are not sent email through marketing campaigns for a set period of time. To choose how long the bounce history of an email address is maintained, go to Setup > Company > Email > Email Preferences. In the field marked **Remove Email Addresses From Bounced Email Address List After**, enter the number of days you want to keep copies of bounced email addresses on the bounce list.

You can use the search field Hard Bounced to filter recipients with invalid email addresses from your marketing groups. For more information, see Choosing Email Recipients.

You can view and manage the list of hard bounced email addresses at Lists > Relationships > Bounced Email Addresses. For more information, see Viewing the Bounced Email Address List.

You can create group of recipients based on the type of system response received for them after sending an email campaign. For more information, see Creating Groups Based On Campaign Response Count.

For more information on managing bounced email addresses, see the following topics:

- Troubleshoot Undelivered Email
- Undelivered Emails Saved Search
- Invalid Email Address Notification
- Mass Unsubscribing Entities with Bounced Email Addresses

Troubleshoot Undelivered Email

This topic includes some troubleshooting tips for determining why email messages from NetSuite are not being delivered.

See also the **Five Golden Rules for Outbound Email** in Email Best Practices for information on how to optimize email campaign delivery.

1. If an email message to one person was not delivered, go to Lists > Relationships > Bounced Email Addresses to determine if the recipient is on the bounced email list. For more information, see Viewing the Bounced Email Address List.
2. Determine whether the email was blocked by NetSuite or whether it was rejected on the destination mail system. For more information, see Undelivered Emails Saved Search.
3. Go to Lists > Mailing > Undelivered Emails. Find the email address and look at the value in the Compliance Verified column. If the email address is not compliant, check the DKIM settings for your account. For more information about email compliance, see DomainKeys Identified Mail (DKIM).
4. If the Compliance Verified column is set to **No**, go to Setup > Company > Email > Email Preferences. On the Domain Keys subtab, verify or set up a DKIM key for the domain that was populated by the customer in the From header of the email. As of 2017.2, you can set multiple

DKIM keys for each domain that they you use in the From header. When sending an email message, NetSuite uses the DKIM key that best matches the From domain in the current email message. For more information, see the help topic Setting Email Preferences.

Undelivered Emails Saved Search

The Undelivered Emails saved search helps users analyze email deliverability problems. Accessed from Lists > Mailing > Undelivered Emails, the search results provide information logged for undelivered email messages. Fields in each log record include: Sent Date, Log Date, From, Recipients, Subject, Compliance Verified, Message-ID, and Reason. The Recipients field is a comma-separated list of the original recipients to whom a specific email message was not delivered. The Compliance Verified field is used to denote email messages that were not delivered because they failed to meet NetSuite's compliance standards, including DKIM alignment. For more information about DKIM, see DomainKeys Identified Mail (DKIM).

See also the **Five Golden Rules for Outbound Email** in Email Best Practices for information on how to optimize email campaign delivery.

The Reason, or root cause, of a specific error might indicate the following deliverability problems:

Error	Description
Not sent: Blocked by mail filter	The sending rate is not accurate or is too high (similar email messages are being sent too rapidly).
Not sent: Specific address(es) recently bounced	The email was not sent because the recipient address appears on the Bounced Email Addresses list.
Permanent Failure: Delivery not authorized, message refused	The sender is not authorized to send to the destination. This can be the result of per-host or per-recipient filtering.
Permanent Failure: No answer from host	The outbound connection attempt was not answered.
Permanent Failure: Bad destination mailbox address	The mailbox specified in the address does not exist.
Permanent Failure: Unable to route	The mail system was unable to determine the next hop for the message because the necessary routing information was unavailable from the directory server.
Permanent Failure: Mailbox disabled, not accepting messages	The mailbox exists, but is not accepting messages.

A specific email message can have more than one error log record. The destination domains in the original To header determine whether a new error log record is created. Search results can be filtered by Reason, Recipients, and Log Date.

Invalid Email Address Notification

When an email message returns an invalid address, or hard bounce response, any records associated with that email address displays a warning that the email address is invalid. This includes:

- email campaigns
- customer, contact, vendor, employee, and other name records
- email messages

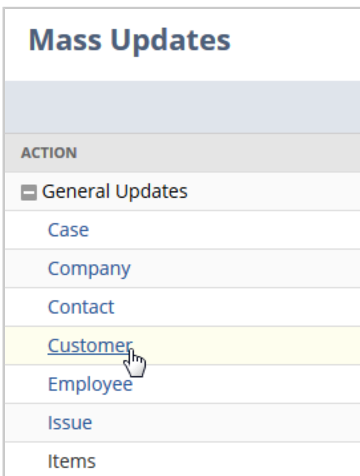
Note: If the **Remove Email Addresses From Bounced Email Address List After** preference is checked, NetSuite will not send email messages to addresses that have triggered a hard bounce for the number of days specified. See Setup > Company > Email > Email Preferences.

Mass Unsubscribing Entities with Bounced Email Addresses

You can unsubscribe customers and others with invalid email addresses from email campaigns with a mass update. This mass update can be based on the Hard Bounced field that is set on a record whenever email sent from NetSuite triggers a hard bounce.

To unsubscribe entities with bounced email addresses:

1. Go to Lists > Mass Update > Mass Updates.
2. Expand **General Updates**.



3. Click the type of record you want to unsubscribe.
4. On the Mass Update page, on the **Criteria** subtab, select **Hard Bounced** in the **Filter** column.
5. Click **Add**.
6. Enter any other criteria for the records you want to unsubscribe.
7. Click the **Mass Update Fields** subtab.
8. Check the box in the **Apply** column next to **Global Subscription Status** box.
9. In the Value column, select **Soft Opt-Out**.
10. Click **Preview** to review the records that will be affected by this update.
11. On the preview page, click **Perform Update**.

For information on saving mass updates so they can be reused, see the help topic Mass Changes or Updates.

Viewing the Bounced Email Address List

Account administrators have a good view into the reason for a delivery failure to a particular email address. The reason code indicates whether the failure to deliver is temporary (a soft bounce) or permanent (a hard bounce). Accessed from Lists > Relationships > Bounced Email Addresses, this list helps account administrators better manage their email campaign lists.

The following table sums up all potential system generated errors, both soft and hard bounces:

Soft Bounce	Hard Bounce
Mailbox Full	Unknown User
Disabled Account	Bad Domain
Greylisted	Address Error
Server Too Busy	Account Closed
Soft Bounce – Other	Hard Bounce

Key Features:

- Transactional email message addresses are evaluated against hard bounce records in the list. If the recipient for a transactional message matches a hard bounce record in the list, the message will not be sent.
- Bulk email message addresses are evaluated against soft bounce records in the list. If the recipient for a bulk message matches a soft bounce record in the list, the message will not be sent.
- Less serious problems (soft bounces) for both bulk and transitional email recipient addresses are included in the list. A fixed-length TTL is applied to these soft bounces. The TTL assigned could be minutes or hours, depending on the specific reason code.

Each email address that triggers a hard bounce response is automatically excluded from any email traffic for a defined period of time. You can view a list of bounced email addresses at Lists > Relationships > Bounced Email Addresses. On this page, you can also remove email addresses from the list to include them in email campaigns.

To remove an email address from the Bounced Email Addresses list:

1. Go to Lists > Relationships > Bounced Email Addresses.
2. Check the box in the **Delete** column for each email address you want to clear the bounce history for, or click **Mark All** to select all email addresses in the list.
3. Click **Delete**.

When you have cleared the bounce history for an email address, you can send messages to that address.

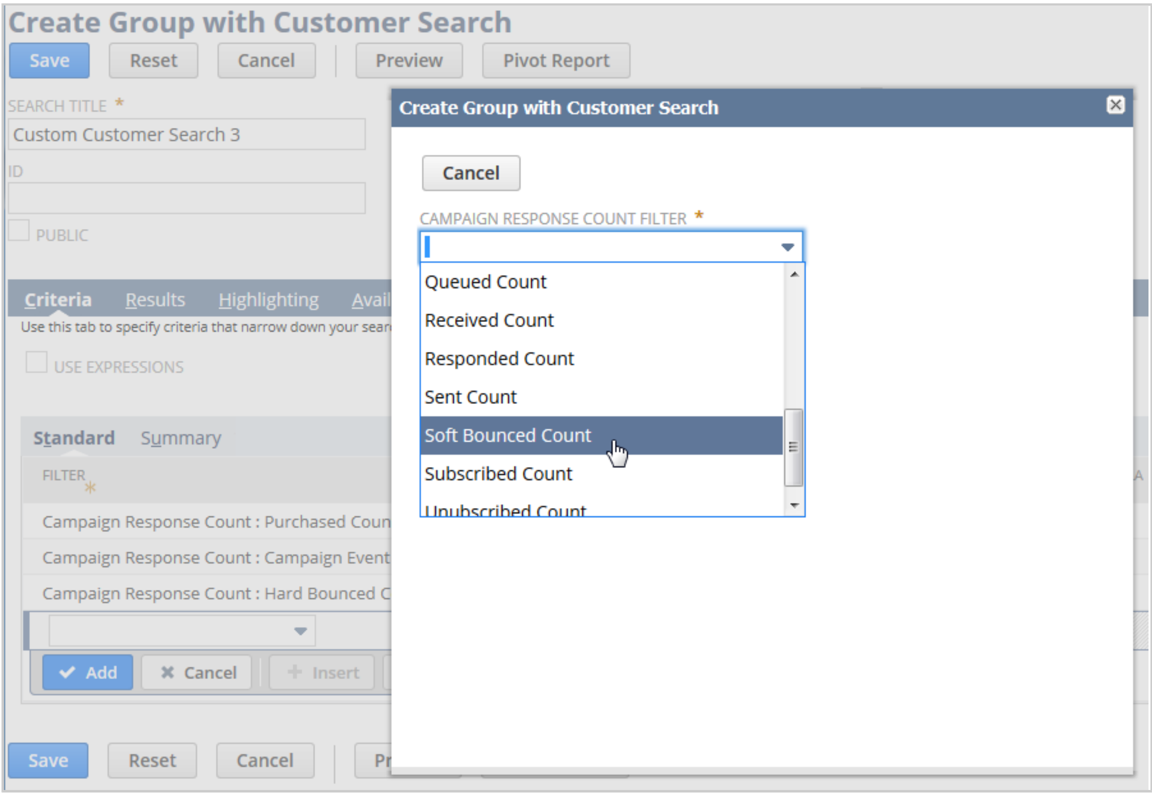
Creating Groups Based On Campaign Response Count

You can create customer, contact, vendor, employee, and partner saved searches, filtering results based on **Campaign Response Count** . This search join provides the count of responses of each response type for the combination of recipient and campaign event. A Customer record is an entity record. There are many response count types to choose from, such as Soft or Hard Bounced Count, Sent Count, Queued Count, or Clicked Through Count. This capability can have multiple uses. An example is provided here.

To create a group of recipients who triggered a bounce response to a campaign email event:

1. In the search form, under the criteria subtab choose the **Campaign Response Count** filter.

2. Choose a field to filter on, in this example, choose **Campaign Event**. Choose from the list of available **Campaign Events**.
3. Add an additional line of criteria by choosing again the **Campaign Response Count** field..
4. From the popup window, choose **Hard Bounced Count** and set the value of the count to be any value of your choice greater than zero.
5. Save or preview.



Paid Search Marketing

You can use marketing campaign records to track the revenue and leads generated by paid search keywords you have purchased through such services as Google Adwords and Yahoo! Sponsored Search.

The first step in executing search keyword campaigns is to create your search keyword campaigns in NetSuite. Then, you can export the campaign information you need to register with a search engine.

There are three ways to create keyword campaigns:

- Creating Keyword Campaigns in Bulk
- Importing Keyword Campaigns
- Creating keyword campaigns individually

Importing keywords and creating keyword campaigns on the Create Keyword Campaigns page both allow you to create many keyword campaign records in bulk.

Before you create keyword campaigns, you should first set up autonumbering for your campaigns and set the Bulk Keyword Campaign Naming Template preference at Setup > Sales & Marketing Automation > Set Up Marketing.When you enter a campaign record, the campaign ID is assigned according to this preference.

When you autonumber campaigns, the landing page URLs for paid keywords are generated automatically. You must only enter the URL of the destination page in the URL field. When you save the record, the campaign ID parameter is added to that URL.

For example, many of Wolfe Electronics paid keywords direct customers to Wolfe's home page. The URL for a keyword campaign might look like:

```
http://www.wolfeelectronics.com/home?leadsource=420
```

In this example, **420** is the campaign ID for this search keyword.

To set up autonumbering, an administrator can go to Setup > Company > Setup Tasks > Auto-Generated Numbers > CRM.

These are the possible steps for a customer to track the leads and revenue generated by an online advertisement:

- Create a campaign for the advertisement.
- Create an online customer form that includes the Lead Source field or Campaign Event field. They can be set to hidden.
- When you create a paid search or display advertisement with a service like DoubleClick, Facebook, Twitter, etc. you need to provide them with a URL to your site than includes the Lead Source or Event ID parameters. These parameters allow you to track how customers arrived to your site.
- You can run reports on revenue and lead generation for the tracked link you provided to the advertising service.
- For more detailed information read sections that go into further details on Lead Source and Campaign Event, such as: Passing Parameters Through URLs

Creating Keyword Campaigns in Bulk

On the Create Keyword Campaigns page, you can create multiple campaigns for paid keywords on various search engines from one page. When you create keyword campaigns using this page, an individual campaign is automatically created for each keyword.

To create keyword campaigns in bulk:

1. Go to Campaigns > Marketing > Create Keyword Campaigns.
2. Under Primary Information:
    1. Select the category for these keyword campaigns.
    2. Select the manager of these keyword campaigns.
    3. Enter start and end dates for these campaigns.
3. Under Related Information, select a campaign vertical, audience description and items you want to associate with this campaign.
4. In the **ID** column, enter a campaign ID for a keyword campaign.
5. Select a search engine and a campaign family.
6. Enter a paid keyword in the **Keyword** column.
7. Enter the cost paid for the keyword.
8. Enter the URL of the landing page or online customer form for this keyword.
9. Select an offer to associate with this campaign.
10. Click **Add**.
11. Repeat these steps for each keyword campaign you want to create.
12. Click **Save**.

When you save this page, campaign records are created for each keyword you added on the Keyword subtab. The vertical, audience, and items selected are applied to each of the campaigns created.

The keyword campaigns created are named according to the Bulk Keyword Campaign Naming Template preference at Setup > Sales & Marketing > Marketing Preferences.

Importing Keyword Campaigns

You can import keyword campaigns using CSV files. NetSuite provides a sample file that you can use to ensure that all of the the keyword campaign information is included. The search engines, families, and offers listed in the CSV file must match the corresponding records exactly.

The keyword campaigns created are named according to the Bulk Keyword Campaign Naming Template preference at Setup > Sales & Marketing > Marketing Preferences.

To import keyword campaigns:

1. If you are logged in with a marketing role, go to Campaigns > Marketing > Create Keyword Campaigns > Import.

    If you are logged in as administrator or a full access role, go to Lists > Marketing > Create Keyword Campaigns > Import.
2. On the Import Assistant page in Step 1: Scan and Upload CSV File, select the type of character encoding for imported data.
3. Click the **Campaign Keywords Template File** link to download a template file, save the file to your system, and populate the saved file with your keyword data.
4. Click **Select** to choose the keyword campaign CSV file you have prepared.
5. Click **Next**.
6. In Step 2: View Mapping / Start Import page, review the mapping of fields (columns) in your CSV file to fields found on the campaign record in NetSuite, and make any necessary changes or additions.

7. Click **Run** to start the import.

When you save this page, campaign records are created for each keyword you import. The vertical, audience, and items selected on the Related Info subtab are selected on the on each of the campaigns created.

Naming Keyword Campaigns

Keyword campaigns that you create in bulk or that you import into NetSuite are named according to the Bulk Keyword Campaign Naming Template preference at Setup > Sales & Marketing > Marketing Preferences.

By default, this naming template used the following format:

Keyword---{searchengine}---{keyword}

So an actual keyword campaign title might be:

Keyword---Google---electronics

You can replace the delimiters with underscores or other characters, but do not remove the **{searchengine}** and **{keyword}** tags unless you do not want this information to show in the title of the keyword campaigns you create.

If you enter individual keyword campaign records manually, it is a good idea to maintain this format so your keyword campaign names are recognizable.

Exporting Keywords

After you have entered your keyword campaigns in NetSuite, you can create a saved search in NetSuite that you use to export the information you need to provide to search engines.

To create a saved search, go to Campaigns > Marketing > Campaigns > Search. Enter criteria for the keyword campaigns that you want to export. For example, you probably would only want to export the campaigns for a single search engine at a time.

Then, choose which information you want to show on the Results subtab. For example, you might only want to include the keyword, the keyword family and the destination URL in your results.

Finally, click Create Saved Search, enter a title for this search, and click Save. When you view these search results, click Export to save the information as a CSV or Excel spreadsheet.

Submitting Your Paid Search Proposal

With the Advanced Web Reports feature enabled, when a customer finds your site through a search engine, NetSuite captures the keyword campaign information for that customer. This allows you to track revenue and lead generation for your paid keywords.

To ensure that this information is stored on the lead or customer record, you should do the following:

- Have an administrator enable the Advanced Web Reports feature at Setup > Company > Setup Tasks > Enable Features. Create campaign records for each keyword you purchase.
- Provide a URL with the proper lead source parameter when you register a keyword with a paid keyword service.

Formatting Destination URLs

When you register keywords with a paid search service, you must provide the URL that customers arrive at when they click a search results link to your company's Website.

The destination URL should be formatted as follows to ensure that the correct keyword campaign is associated with the customer record:

```
http://yourlandingpage.com?leadsource=yourcampaignID
```

When you enter a keyword campaign record in NetSuite, you must only enter the URL for the landing page. When you save the record, the lead source parameter and campaign ID are automatically added to the URL.

You can copy and paste this URL from the record when you register the keyword with the search engine, or you can export this URL into a spreadsheet. For more information, see Exporting Keywords.

When a lead clicks the link to your site, the lead source is saved in the cookie received from your Website. This information is maintained no matter how many times the lead leaves your site and returns. When the lead registers with your Website or submits an online customer form, the lead source is saved to the record.

Managing Cost-Per-Click

Many paid search services have no up-front cost but are paid each time someone clicks your search result. You can calculate ROI at any point in time by updating a campaign's total cost with the cost you have incurred for a certain time period.

Campaign Families

Campaign families represent a grouping of keywords used in marketing campaigns. If you purchase keywords by groups, you can represent the group with a keyword family.

> For example, Wolfe Electronics purchases a group of keywords that refer to specific brands of computer systems. These keywords are grouped in the keyword family Computers.

> **Note:** Grouping keyword campaigns by family can make it easier to view keyword reports, especially if you have many keyword campaigns.

You can track keyword families on the Keyword subtab of campaign records. You can customize campaign reports to include information about keyword families. The Family Name field is included in the Lead Source component. For more information, see the help topic Report Customization.

To create a campaign family, go to Setup > Marketing > Campaign Management > Campaign Families > New.

Promotions

Promotions enable you to create special offers to motivate your customers to purchase products in higher quantities. Promotions can help you to move out-of-date stock, increase sales, and reward valuable clients. Promotions provide discounts that customers can apply to web store orders and orders placed with sales reps. Furthermore, NetSuite promotions enable you to target specific customers, locations or channels, and time periods.

Promotions Overview

You can create a wide range of feature-rich promotions, whether you use SuitePromotions, the Advanced Promotions SuiteApp, or standard promotions.

SuitePromotions take advantage of all the most recent promotion enhancements, as well as user interface and performance improvements.

You can offer your customers:

- Item promotions that give percentage or currency amount discounts on items.
- Fixed price item promotions that give items for a fixed discounted price.
- Order promotions that give percentage or currency discounts at the order level.
- Shipping promotions that give your customers free shipping on specific shipping methods.
- Free gift promotions that give your customers an item for free.

Enhancements Introduced in SuitePromotions

With SuitePromotions, NetSuite has introduced several enhancements that enrich the way you offer promotions to your customers:

- Stackable Promotions
- Auto-Apply Promotions
- Best Offer
- Cached Saved Searches
- Audit and Visibility
- Automatically Add Free Gift to the Transaction

> **Important:** Existing standard and Advanced promotions are not compatible with the new enhancements introduced in SuitePromotions. For more information, see Migrating to SuitePromotions.

Stackable Promotions

NetSuite lets you offer your customers better discounts by applying multiple promotions to one transaction. You can add any combination of item promotions, order promotions, and shipping promotions to an order.

You also have complete control over which promotions you want to be able to stack and which you would prefer to be exclusive and not combined with other promotions.

View the Combining SuitePromotions video

Stackable Promotions work with the Auto-Apply Promotions feature so that sales reps can have NetSuite automatically apply multiple promotions to an order. For information on automatically applying promotions to a transaction, see Automatically Applying Promotions.

Stackable Promotions require very little configuration. After you enable the SuitePromotions feature, you can apply more than one promotion to a transaction, see Configuring Promotions.

Auto-Apply Promotions

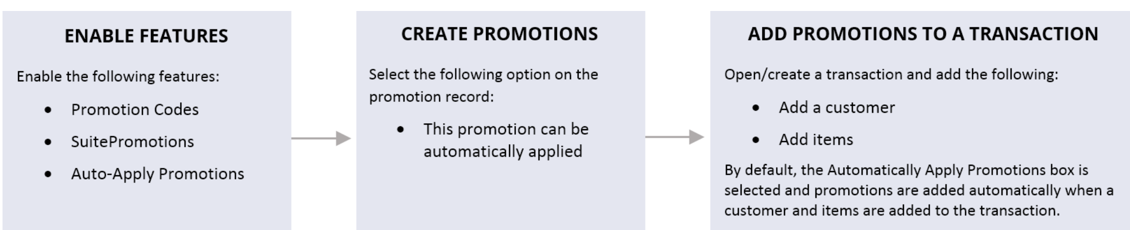
NetSuite lets you automatically apply multiple promotions to a transaction. This streamlines the work of your sales reps by automatically applying eligible promotions without the need to manually find out which promotions should be applied. The Auto-Apply Promotions feature ensures multiple promotions are quickly added to transactions at the point of sale.

Auto-apply runs in the background and when changes are made to a transaction it determines which promotions the transaction is eligible for.

Currently, you can automatically apply up to 30 active promotions to a transaction for a specific date range per location. You can however, add more promotions manually if the transaction is eligible. For more information, see Auto-Apply Promotions Limits.

Before promotions can be automatically applied to a transaction you must first enable the required features in NetSuite and create the promotion records, see Configuring Promotions.

The following diagram shows the steps needed to automatically apply promotions to a transaction.



For information on automatically applying promotions to a transaction, see Automatically Applying Promotions.

Best Offer

When several promotions are eligible on a transaction including exclusive promotions, NetSuite applies the promotion or promotions that ensure the customer gets the best offer (the largest discount on the transaction) available. If you have many promotions running at the same time, Best Offer in combination with the Auto-Apply Promotions feature saves you valuable time and keeps your customers happy. Best Offer also works equally well with manually applied promotions.

For more information, see How Best Offer is Applied.

Cached Saved Searches

The Cached Saved Search feature lets you configure the way that a promotion handles saved searches. You can choose to use cached saved searches which provide better performance by returning the results faster. You can also choose to check for the latest saved search results every time a promotion is applied to a transaction to get the most up to date results possible, but results are retrieved slower.

For more information, see Saved Search Performance.

Audit and Visibility

Audit and Visibility provides details of the promotions that are applied to transactions. This is important when multiple promotions can be automatically applied to a transaction, and the Best Offer logic is managing which combination of promotions are applied. With Audit and Visibility you can see which promotions have been applied to a transaction, which have not been applied, and the reasons why.

For more information see Viewing the Status of Applied Promotions.

Automatically Add Free Gift to the Transaction

With SuitePromotions, you can create a promotion that automatically adds a free gift to an eligible transaction. Currently, any inventory item can be offered as a free gift with the exception of parent-matrix items.

For more information see Creating Free Gift Promotions.

Features Specific to Advanced Promotions Only

Tiered promotions are available only in promotions created using the Advanced Promotions SuiteApp. This feature is currently not available for SuitePromotions.

Tiered Promotions

If you use the Advanced Promotions SuiteApp you can create a tiered promotion that offers different discounts depending on the quantity or sales amount of items sold or on transaction total.

For example, you may have a single promotion that offers a 25% discount on orders of greater than $50 and a 30% discount for orders greater than $100.

For more information, see Creating Tiered Promotions.

Configuring Promotions

To use promotions in NetSuite, an administrator must first enable the promotion features.

If you choose to use the Advanced Promotions SuiteApp, an administrator must first install the bundle and set up role permissions.

Enabling Promotion Features

An administrator can enable promotion features at Setup > Company > Setup Tasks > Enable Features (Administrator) on the Transactions subtab.

> **Note:** In NetSuite, the role you use has a set of permissions that give you access to pages, transactions, and records. Your role also determines the tabs and navigation menu in the application.
>
> Most of the tasks in this guide use the standard Marketing Manager role. If a task or procedure cannot be completed with the Marketing Manager role, instructions are provided using the Administrator role.
>
> If you have questions about your role and access permissions, speak with your account administrator. For more information on roles and permissions, see the help topic NetSuite Access Overview.

Before enabling the SuitePromotions feature, the Promotion Codes feature must be enabled.

With the SuitePromotions feature enabled, the Promotions subtab appears on sales orders, cash sale transactions, invoices, and return authorizations. In addition, the Coupon Code and Promotions fields no longer appear on the Items subtab.

Before you can create promotions that can be automatically applied, you must first enable the Auto-Apply Promotions feature.

To enable Promotion features:

1. Go to Setup > Company > Enable Features, and click the **Transactions** subtab.
2. Under Sales:
    1. Check the **Promotion Codes** box.
    2. Check the **SuitePromotions** box.
    3. Check the **Auto-Apply Promotions** box.
3. Click **Save**.

> **Note:** The SuitePromotions feature is not compatible with the Revenue Commitments feature. Disable Revenue Commitments before you enable SuitePromotions. For more information, see the help topic Enabling the Revenue Commitments Feature.
>
> The SuitePromotions feature is not compatible with the Customer Center. Customers cannot open orders directly from the Customer Center when SuitePromotions is enabled.

Enabling Other Features that Impact Promotions

To manage promotion eligibility based on sales channels, further features must be enabled, relating to:

- locations
- websites

Enabling Features for Location-Based Promotion Eligibility

Before you can set location-based promotion eligibility, you must first enable the Locations feature.

To enable the Locations feature:

1. Go to Setup > Company > Enable Features, and click the **Company** subtab.
2. Under Classifications, check the **Locations** box.
3. Click **Save**.

Enabling Features for Website-Based Promotion Eligibility

Before you can set website-based promotion eligibility, you must first set up SuiteCommerce Advanced. For more information, see *SuiteCommerce Advanced*.

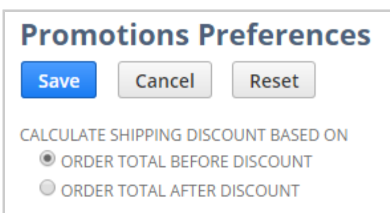
Note: Site Builder websites are not eligible for website-based promotion eligibility.

Configuring How Free Shipping Eligibility is Calculated

You can choose how you want shipping discount to be calculated with respect to the order total. Eligibility for free shipping can be based on the original order total before any discounts have been applied from eligible promotions, or on the order total after discounts have been applied.

To configure how free shipping eligibility is calculated:

1. Go to Setup > Marketing > Promotions Preferences.
2. Select to calculate shipping based on:
   - **Order total before discount** – the transaction is eligible for free shipping based on the order total before promotion discounts have been applied. This is the default option.
   - **Order total after discount** – the transaction is eligible for free shipping based on the order total after promotion discounts have been applied.
3. Click **Save**.



Installing Advanced Promotions

An administrator must install the Advanced Promotions bundle and set up role permissions before you can create Advanced Promotions.

To install the Advanced Promotions bundle:

1. Ensure the **Promotion Codes** feature is enabled.
   a. Go to the **Transactions** subtab at Setup > Company > Setup Tasks > Enable Features (Administrator).
   b. Under Sales, check the **Promotion Codes** box.
   c. Click **Save**.
2. Install the **Advanced Promotions SuiteApp**.
   a. Go to Customization > SuiteBundler > Install Bundle (Administrator).
   b. Use the following search criteria to locate the SuiteApp:
      - Location: Production Account
      - Account ID: 3856193
      - Availability: Public

- Bundle ID: 49247

The company name is NetSuite Platform Solutions Group. For information on installing SuiteApps, see the help topic Installing a Bundle.

> **Important:** The promotion entry forms installed with this SuiteApp are locked and cannot be customized.

3. Enable the promotion types:
   a. Go to Customization > Plug-ins > Manage Plug-ins > Promotions (Administrator).
   b. On the Manage Plug-In Implementations page, under Promotions, check the box next to each promotion type you want to create.
   c. Click **Save**.

The Advanced Promotions SuiteApp is a managed SuiteApp and is automatically updated whenever there are updates. These issue fixes and enhancements are available after the SuiteApp is updated in your account.

After you install the Advanced Promotions SuiteApp, when you go to Campaigns > Marketing > Promotions > New, you can choose from a list of promotion types. Selecting a promotion type opens a promotion form specific for that promotion type.

If you use custom roles that you want to access the Advanced Promotions SuiteApp, assign the following permissions to those roles:

Under Permissions > Lists:

- Currency - View (This permission is required only if you use the Multiple Currencies feature.)
- Customers - View
- Documents and Files - View
- Items - View
- Perform Search - Full
- Promotion - Full
- Publish Search - Create

Under Permissions > Custom Record:

- AP Eligible Customer - Full
- AP Minimum Purchase - Full
- AP Promotion Discount - Full
- AP Promotion Shipping Method
- AP Promotion Shipping Price
- AP Promotional Offer - Full
- AP Saved Search Select Setup - Full

The Promotion Record

Each promotion type has its own unique promotion form. However, all promotions consist of the same basic elements. Before you create a promotion, you should understand each of the following promotion elements:

- **Basic properties** – identify the promotion. See Basic Properties of a Promotion.
- **Scheduling** – limit promotion usage to a specific date range. See Scheduling Promotions.
- **Buy conditions** – define what the customer needs to buy to be eligible for the discount. See Promotion Buy Conditions.
- **Get conditions** – define what the customer will get from the promotion. See Promotion Get Conditions.
- **Coupon codes** – let you apply promotions to a transaction. See Coupon Codes.
- **Targeting customers** – limit promotion usage to specific customers or groups of customers. See Targeting Promotions at Specific Customers.
- **Sales channels** – limit promotion usage to specific sales channels. See Setting Where Promotions Can Be Used.
- **Usage limits** – limit how many times a promotion can be used by each customer. See Promotion Usage Limits.

Basic Properties of a Promotion

To identify a promotion, you must give each promotion a useful name. You can also provide a description for each promotion if needed.

On SuitePromotions, name and description information is defined in the SuitePromotions Basic Properties section on the promotion record.

On standard and Advanced promotions, name and description information is defined in the **Primary Information** section on the promotion record.

Scheduling Promotions

You can restrict promotions to make them available only during specific date ranges.

Use the Start Date and End Date fields on the promotion record to set scheduling criteria.

On SuitePromotions, start and end dates are defined in the SuitePromotions Scheduling section on the promotion record.

On standard and Advanced promotions, start and end dates are defined in the **Primary Information** section on the promotion record.

> **Note:** There are limits to the number of promotions that can be automatically applied based on schedule and location. For more information, see Auto-Apply Promotions Limits.

Promotion Buy Conditions

Buy conditions are the promotion's eligibility rules that determine the transactions that qualify for the promotion. A promotion can only be applied to a transaction that meets the requirements specified by the eligibility rules.

You choose which customers are eligible for the promotion, specify locations or websites that are eligible, or if the order itself must meet specific criteria to be eligible for the promotion, or a combination of all the preceding factors. Criteria can include items that the customer must buy or a minimum amount that the customer must spend, or both. Item promotions for example, can contain eligibility criteria for a minimum order amount and a specific item or items. A transaction will be eligible for a promotion's discount only if it meets all of the defined eligibility criteria.

You can create promotions that do not have any Buy conditions.

On SuitePromotions, Buy conditions are defined in the What the Customer Needs to Buy section.

On standard promotions, a minimum order amount is defined in the **Primary Information** section on the promotion record. Item discounts are defined on the **Items** subtab.

On Advanced Promotions, Buy conditions are defined on the **Eligibility** subtab of the promotion record.

Promotion Get Conditions

When creating a promotion, the first thing to consider are the Get conditions. Get conditions specify exactly what the customer gets when a transaction meets the requirements defined by the promotion's eligibility rules. You must determine the following:

- **What is the discount applied to?** – you can apply the discount to Items, orders or shipping. This choice determines the promotion type. See What the Discount is Applied to – Promotion Types.
- **What is the discount rate?** – you can apply percentage or flat rate discounts, apply a fixed discounted price to an item, or provide a free gift. See Promotion Discount Rates.
- **Which eligible item or items is the discount applied to?** – if you have an item promotion you must determine if the discount is applied to each eligible item in the transaction, or only the cheapest or most expensive. See Apply Promotion Discount to Each or Every X Items.

What the Discount is Applied to – Promotion Types

There are various aspects of a transaction to which you can apply discount. What you apply discount to, determines what type of promotion you need to create.

Types of SuitePromotions

All types of SuitePromotions take advantage of the Stackable Promotions, Auto-Apply Promotions, Best Offer, Cached Saved Search, and Audit and Visibility features.

There are five types of SuitePromotions:

- **Item Promotions** – percentage or currency amount discounts are applied to items included in an order. These promotions create line-level discounts for each item defined on the promotion. See Creating Item Promotions.
- **Fixed price item promotions** – specific items are available for a fixed promotional price. These promotions create line-level discounts for each item defined on the promotion. See Creating Fixed Price Item Promotions.
- **Order promotions** – percentage or currency amount discounts are applied at the order level and can be based on the order total or on items included in the order. See Creating Order Promotions.
- **Shipping Promotions** – discounts are applied to certain shipping methods and can be based on the order total or on items included in the order. See Creating Shipping Promotions.
- **Free gift promotions** – a specific item is available for free. This free item is automatically added to eligible transactions. See Creating Free Gift Promotions.

Non-SuitePromotions Types

You can also create the following promotions, but note they are not compatible with the new enhancements available with SuitePromotions:

- **Standard Promotions** – see Creating Standard Promotions.
- **Advanced Promotions** – see Creating Advanced Promotions.

> **Note:** Standard and Advanced promotions cannot be stacked, automatically applied to a transaction, use the best offer logic, manage how free shipping eligibility is calculated, or manage saved search performance.
>
> For more information regarding the limitations of using standard and Advanced promotions, see Migrating to SuitePromotions.

Promotion Discount Rates

Promotions can offer percentage or currency amount discounts, or items (free gifts).

Currency amount discounts are referred to as flat rate discounts because the amount of discount awarded to the customer is fixed.

Promotion discounts are not defined by discounts items selected in the **Discount Item for Accounting** field. This field is mandatory but only required for accounting purposes.

Promotion discount rates are defined:

- On SuitePromotions, in the What the Customer Will Get section.
- On standard promotions, in the **Discount Rate** field under Primary Information.
- On Advanced Promotions, on the **Discount** subtab.

If you use the Multiple Currencies feature, you can offer flat rate discounts in each currency you use.

> **Note:** Promotion discounts can never exceed the item or order total.

Fixed Price Item Discounts

Rather than offering a discount as a percentage or amount off of an item's price, you can instead set a fixed price. To do this, create a fixed price item promotion. Set the eligibility criteria and define the currency price for the discounted items.

For information, see Creating Fixed Price Item Promotions.

Free Gift Promotions

You can also offer specific items with 100% discount that will be automatically added to the customer's order. To do this, create a free gift promotion. Set the eligibility criteria and define which item will be added to the transaction for free.

For information, see Creating Free Gift Promotions.

Tiered Promotion Discounts

Tiered promotions offer different discounts depending on the quantity or sales amount of items sold or on transaction total. For example, you may have a single promotion that offers a 25% discount on orders of greater than $50 and a 30% discount on orders greater than $100.

For information, see Creating Tiered Promotions.

> **Note:** Tiered Promotions are currently only available with the Advanced Promotions SuiteApp.

Apply Promotion Discount to Each or Every X Items

Item promotion discounts (including fixed price item promotions) can be applied to:

- each eligible item in the transaction, or
- the cheapest or most expensive eligible item or items in the transaction

By default, a discount is applied to each eligible item.

When you create an item promotion with specific item buy conditions, you can select the quantity of items that must be bought at full price to make the transaction eligible for the promotion. In such promotions, the discount is not applied to each eligible item, it is applied to the additional items added to the transaction after this quantity is met. For example, if a customer must buy one item at full price to get a discount on additional items and they have two of these items in their transaction, they will get a discount on one of these items. If they have four of these items in their transaction, they will get a discount on two. To determine which of the items is discounted you specify if the discount is applied to the cheapest or most expensive of the eligible items.

For more information regarding setting the quantity of eligible items that must be bought at full price, see What the Customer Needs to Buy.

Coupon Codes

Coupon codes can be multiple-use or single-use. Multiple-use codes can be used any number of times by any number of customers. Each single-use code can only be used one time by a single customer.

A promotion can include as many single-use codes as you require. If you are sending coupons out to a group of customers, you can provide a unique coupon code for each customer. These single-use codes can be imported or generated on the promotion record.

Single-use codes can also be included in email offers you send through NetSuite marketing campaigns.

On SuitePromotions, standard and Advanced promotions, coupon codes are defined on the **Coupon Codes** subtab.

See also:.

- Associating Coupon Codes With a SuitePromotion
- Associating Coupon Codes With a Standard Promotion
- Associating Coupon Codes With an Advanced Promotion

Single-Use Coupons

You can create single-use coupon codes that enable you to personalize your promotional campaigns and email marketing by providing each recipient a unique coupon code that can only be used one time by a single customer.

On the Coupon Codes subtab of promotion records, you can choose to use a list of single-use coupon codes or enter a multi-use coupon code that can be used any number of times. Single-use coupon codes can be used by any single customer who meets the promotion's customer eligibility requirements.

> **Note:** The Coupon Codes subtab is called Codes on standard and Advanced promotions.

> **Note:** If you do not set customer eligibility on the promotion, anyone with the code can use it as long as it has not been used before.

All single-use codes are listed on the Coupon Codes subtab on the promotion. You can click a code to see more details including the date it was sent and which customer used the code. Single-use coupon codes can be used on sales transactions entered through your web store as well as those entered in NetSuite.

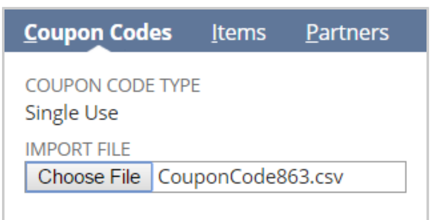
To create a promotion with single-use coupon codes, click the Coupon Codes subtab, and in the Number of Uses field, select Single Use.

There are two ways to create single-use coupon codes. You can either prepare a CSV file and import it into NetSuite, or you can have NetSuite generate the coupon codes for you. After you have saved a promotion, you can also click New on the Coupon Codes subtab to manually enter a single coupon code.

Importing Single-Use Coupon Codes

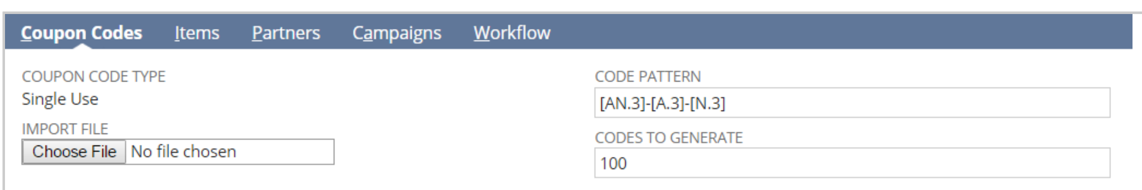
To import a CSV file with coupon codes, you can do any of the following:

- First create and save the promotion record. Then, go to Lists > Marketing > Import Coupon Codes (Administrator). Download the CSV template, enter the name of the promotion record in the first column, enter your coupon codes in the second column, and then run the CSV import.
- You can also import coupon codes on the promotion record when you are creating the promotion record by selecting your CSV file in the Import File field. When you save the promotion, the coupon codes are imported.



Generating Single-Use Coupon Codes on the Promotion Record

NetSuite can generate coupon codes for you on the promotion record. You define a code pattern and enter how many codes you would like to generate. When you save the promotion, the coupon codes are generated.



You enter code patterns using the following components in any order you choose:

- [A.#] – This adds a number of random letters in the code.
- [N.#] – This adds a number of random numbers in the code.
- [AN.#] – This adds a number of random alphanumeric characters to the code.
- Hard-coded alphanumeric characters. Do not enclose these in square brackets.
- Dashes (-)

For example, the code ABC-[AN.3]-[A.3]-[N.3] would generate codes like:

- ABC-J3N-FLN-647

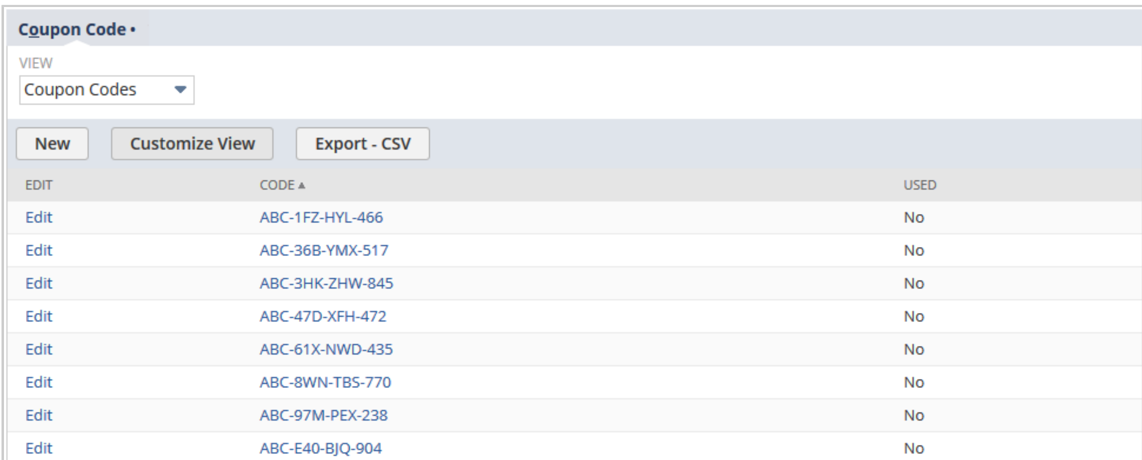
- ABC-45F-KPM-958
- ABC-5MP-PQA-874

The code [N.1]-[A.1]-[AN.5]-T-SHRT would generate codes like:

- 1-Q-6NJWU-T-SHRT
- 2-X-J0BR1-T-SHRT
- 4-Y-K9ZHC-T-SHRT

> **Note:** The following letters and numbers cannot be used in coupon codes: 1, 0, I, L, O. Do not include spaces.

When creating your code pattern, make sure that the pattern you give has enough variables to provide the number of unique codes you need for your promotion.



Promotions and Marketing Campaigns

Promotions can work with your marketing campaigns.

Single-use coupon codes and multi-use coupon codes are sent through campaigns differently. You can send both types of codes effectively with email campaigns. To include a single-use coupon code, you can use the `${campaignEvent.couponCode}` tag. This tag places a unique coupon code for each recipient to use. With multi-use coupon codes, you can include the actual coupon code in the text of the email.

When the coupon code is used on an order, the promotion's discount is applied, and you can track the revenue on promotion reports.

You can also pass coupon codes through links to your web store. To pass a coupon code, add the promocode parameter to the end of the URL. When a recipient follows the link to your site, the coupon code is stored and applied to your order when you check out.

The URL for a multi-use coupon code should be formatted like the following:

```
http://www.yoursite.com?promocode=<insert your coupon code here>
```

If the coupon code was SPRINGSALE, your URL would be:

```
http://www.yoursite.com?promocode=SPRINGSALE
```

If you are passing a single-use coupon code, the URL would include the tag enclosed in angle brackets:

```
http://www.yoursite.com?promocode=${campaignEvent.couponCode}
```

When the email is generated by your marketing campaign, the tag in the URL is replaced with the actual single-use coupon code.

> **Note:** Often links to your website include multiple parameters. The first parameter is preceded by a ?, and subsequent parameters begin with &.

If you use promotions for the tracking of campaigns and campaign events, it is important that you do not associate a promotion with more than one campaign or campaign event. You should either create a separate promotion for each campaign, or if you are tracking revenue by promotion, use lead source for revenue tracking.

> **Note:** If you include promotions in your marketing campaigns, it is recommended that you use Lead Source to track campaign revenue instead of promotions.

Sending Single-Use Coupon Codes Through Email Campaigns

You can send single-use coupon codes through email marketing campaigns by including the `${campaignEvent.couponCode}` tag in your marketing template. This tag is replaced in the email with a unique coupon code for each email recipient.

> **Important:** If your promotion has customer eligibility requirements defined by a saved search, be sure to use that same search to define the recipient group on the email campaign used to distribute the coupon code. If you use different saved searches, your recipients might not be able to use the code. Also, make sure these saved searches are both either dynamic or static.

If you are creating your template in NetSuite, to insert this tag, select Other in the Field Type list and in the Insert Field list, choose Coupon Code. If you are creating the template outside of NetSuite in an HTML editor, use the `${campaignEvent.couponCode}` tag in the HTML.

For information on passing coupon codes through URLs, see Promotions and Marketing Campaigns.

To schedule an email campaign event that includes single-use coupon codes, your email event needs two things:

- a marketing template that includes the `${campaignEvent.couponCode}` tag
- a promotion with single-use coupon codes selected in the Promotion column for that event

> **Important:** You cannot use this tag for campaign events associated with multi-use coupon code promotions.

For promotions with coupon codes generated by a code pattern, if there are more recipients of the email campaign than you have coupon codes, NetSuite automatically generates enough codes for your recipient list.

If you have a promotion where you have imported the coupon codes, it is important that you make sure there are enough coupon codes to accommodate the number of the campaign's recipients. If there are not enough coupon codes, some recipients will not be sent the email message. A list of intended recipients who were not sent the email because there were not enough codes is included in the confirmation email you receive after the event executes.

Targeting Promotions at Specific Customers

You can choose the customers who are eligible for a promotion so that you can specifically target certain customers. This means you can define accurate pricing and promotions that reward more valued customers to strengthen loyalty.

On SuitePromotions, customer eligibility is defined on the **Audience** subtab on the promotion record. For more information, see Setting Customer Eligibility on SuitePromotions.

On standard promotions, customer eligibility is determined using partners and is defined on the **Partners** subtab on the promotion record. For more information, see Associating Partners With a Standard Promotion.

On Advanced Promotions, customer eligibility is defined on the **Eligibility** subtab on the promotion record. For more information, see Setting Up Promotion Eligibility for Advanced Promotions.

Setting Where Promotions Can Be Used

You can restrict promotions so that they can only be used at specific locations, or on specific websites.

To set location-based promotion eligibility, you must first enable the Locations feature. See Enabling Other Features that Impact Promotions.

On SuitePromotions, location and website restrictions are defined on the **Sales Channel** subtab on the promotion record. For more information, see Setting Sales Channel Eligibility on SuitePromotions.

On standard and Advanced promotions, location and website restrictions are defined in the **Primary Information** section on the promotion record.

> **Note:** There are limits to the number of promotions that can be automatically applied based on schedule and location. For more information, see Auto-Apply Promotions Limits.

Promotion Usage Limits

Usage limits enable you to specify how many times a customer can use a promotion. You can choose to permit unlimited usage per customer or limit each customer to use the promotion one time only.

On SuitePromotions, usage limits are defined on the **Usage Limits** subtab on the promotion record. For more information, see Setting Usage Limits on SuitePromotions.

On standard and Advanced promotions, usage limits are defined in the **Primary Information** section on the promotion record.

Creating Promotions

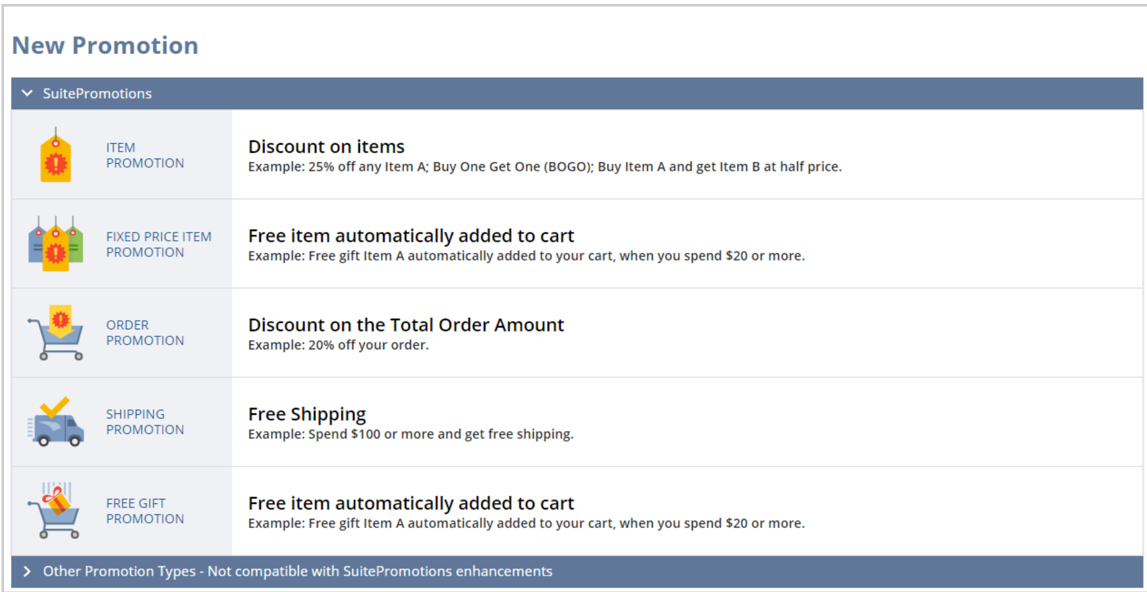
You can create promotions for each predefined promotion type. This section examines the different promotion records in detail and explains how to create the following promotions:

- Creating SuitePromotions:
  - **Item promotions** – see Creating Item Promotions.
  - **Fixed price item promotions** – see Creating Fixed Price Item Promotions.
  - **Order promotions** – see Creating Order Promotions.
  - **Shipping promotions** – see Creating Shipping Promotions.
  - **Free gift promotions** – see Creating Free Gift Promotions.

- Creating Standard Promotions
- Creating Advanced Promotions:
  - **Item-based promotions** – see Creating Item-Based Advanced Promotions.
  - **Buy X, Get Y promotions** – see Creating Buy X, Get Y Advanced Promotions.
  - **Order-based promotions** – see Creating Order-Based Advanced Promotions.

To create any type of promotion you must first go to the new promotions landing page, where you can select the type of promotion you want to create.

To open the new promotions landing page, go to Lists > Marketing > Promotions > New.



The types of promotion that appear on the landing page depend on which promotions you have enabled. For more information, see Configuring Promotions.

Creating SuitePromotions

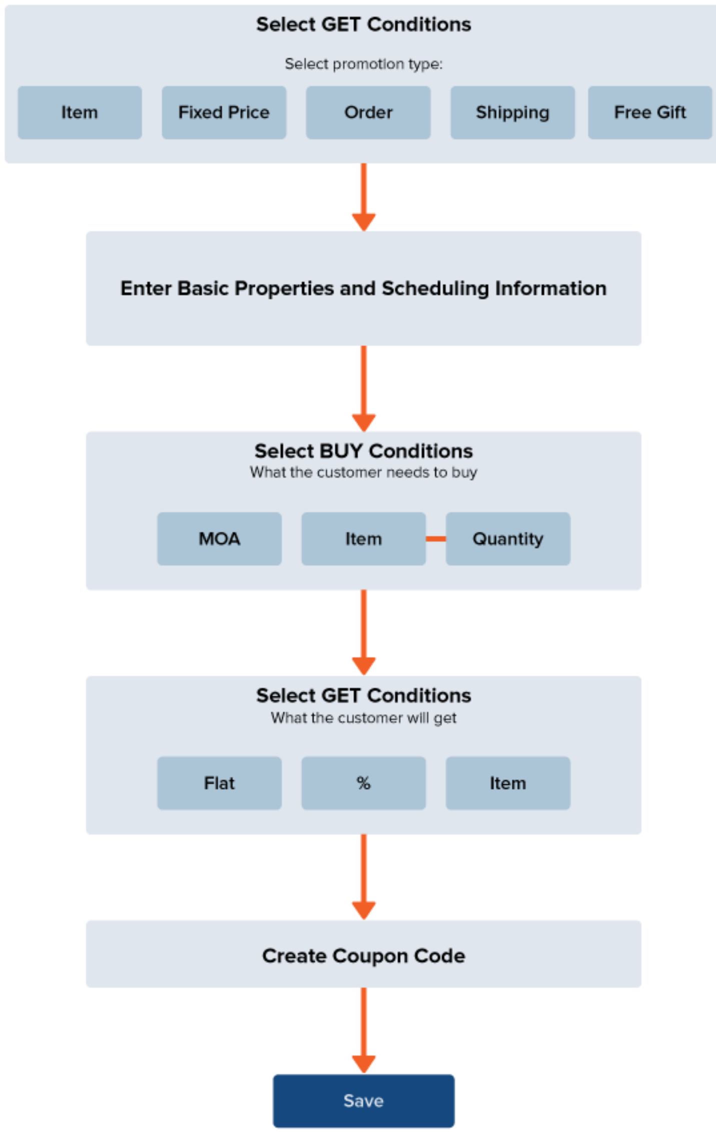
With SuitePromotions you can offer your customers a wide range of promotions that benefit from all the Enhancements Introduced in SuitePromotions.

SuitePromotion Types

SuitePromotions let you offer your customers the following types of promotion:

- **Item promotions** – give percentage or currency amount discounts on items. See Creating Item Promotions.
- **Fixed price item promotions** – give items for a fixed discounted price. See Creating Fixed Price Item Promotions.
- **Order promotions** – give percentage or currency discounts at the order level. See Creating Order Promotions.
- **Shipping promotions** – give your customers free shipping on specific shipping methods. See Creating Shipping Promotions.
- **Free gift promotions** – give your customers a free gift that is automatically added to their order. See Creating Free Gift Promotions.

The basic workflow for creating SuitePromotions is as follows:



Each type of Suite Promotion follows the same workflow. You select the promotion type, enter basic properties and scheduling information, enter the Buy conditions, specify further Get conditions, and finally create a coupon code. The main variation in the process occurs when applying the Get conditions available, which differ depending on the type of promotion.

The promotion records for all SuitePromotions contain the following sections:

- **Basic Properties** – see SuitePromotions Basic Properties
- **Scheduling** – see SuitePromotions Scheduling
- **Further Settings** – see SuitePromotions Further Settings
- **What the Customer Needs to Buy** – see What the Customer Needs to Buy
- **What the Customer Will Get** – see What the Customer Will Get
- **Coupon Codes subtab** – see Associating Coupon Codes With a SuitePromotion
- **Audience subtab** – see Setting Customer Eligibility on SuitePromotions

- **Sales Channels subtab** – see Setting Sales Channel Eligibility on SuitePromotions
- **Usage Limits subtab** – see Setting Usage Limits on SuitePromotions

Each section is identical for each Suite promotion type with the exception of the **What the Customer Needs to Buy** and **What the Customer Will Get** sections.

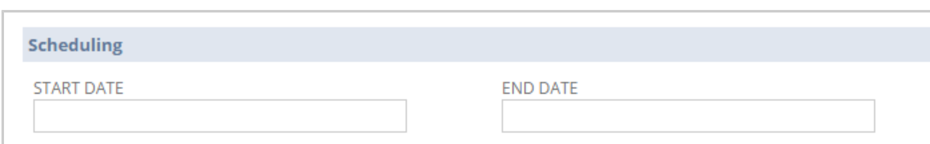
SuitePromotions Basic Properties

The Basic Properties section provides basic details regarding the promotion.

Field	Description
Custom Form	Select the promotion type. You can select one of the Suite promotion types (item, order, or shipping) or the Standard Promotion Code Form.
Name	Enter a name for the promotion.
Description	Enter a description of the promotion.
Inactive	Check this box to make this promotion inactive but not deleted. The promotion will not be available for selection on a transaction.

SuitePromotions Scheduling

In the scheduling section, you can set time frames for when the promotion is valid.



Field	Description
Start Date	Enter the date from when the promotion is valid.
End Date	Enter the date after which the promotion is no longer valid.

If you leave the Start Date and End Date fields blank, the promotion is permanently valid.

SuitePromotions Further Settings

The Further Settings section provides controls specifically related to the behavior of promotions on transactions when the SuitePromotions feature is enabled.

You can determine:

- if a promotion can be automatically applied to a transaction

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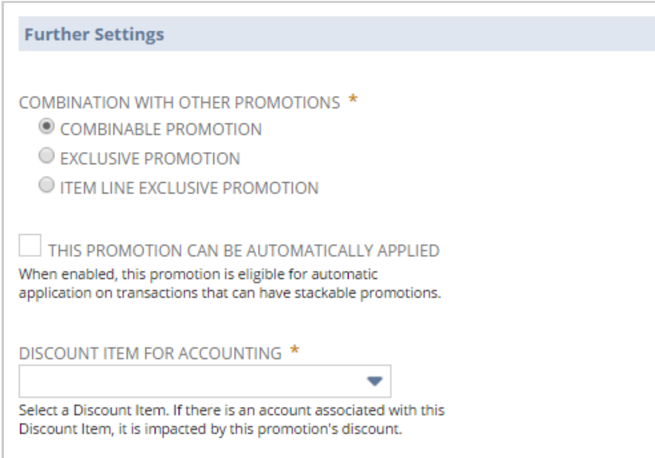
- if a promotion can be combined with other promotions, or is exclusive – globally or only in relation to a specific item, or promotion type



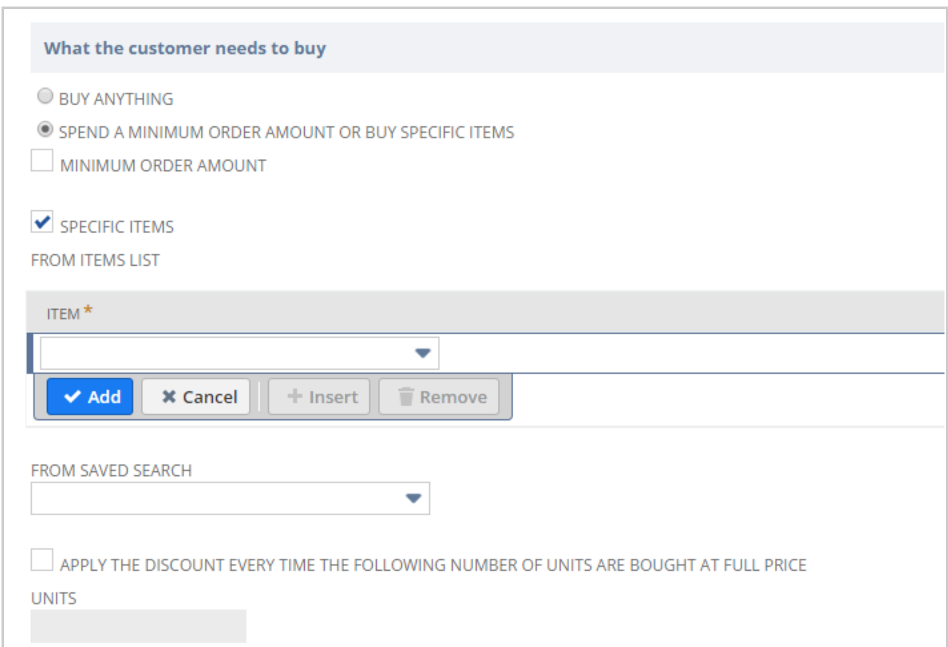
Field	Description
Combining Options SuitePromotions enable you to combine multiple promotions on the same transaction, but you can also determine exactly which promotions can or cannot be combined with others. **Note:** Free gift promotions cannot be made exclusive and are not considered in the Best Offer logic. For more information see Best Offer. View the Combining SuitePromotions video	
Combinable Promotion	Select this option to permit this promotion to be combined with other eligible promotions on a transaction when the SuitePromotions feature is enabled.
Exclusive Promotion	Select this option to prevent this promotion from being combined with other eligible promotions on a transaction when the SuitePromotions feature is enabled.
Item Line Exclusive Promotion	Select this option to prevent this promotion from being combined with other eligible promotions for the same item on a transaction when the SuitePromotions feature is enabled. It is important to emphasize that exclusivity is based on the item receiving the discount, not on the promotion type. This option is available for only item type promotions.
Order Type Exclusive Promotion	Select this option to prevent this promotion from being combined with other eligible order type promotions on a transaction when the SuitePromotions feature is enabled. This option is available for only order type promotions.
Shipping Type Exclusive Promotion	Select this option to prevent this promotion from being combined with other eligible shipping type promotions on a transaction when the SuitePromotions feature is enabled. This option is available for only shipping type promotions.

Field	Description
This promotion can be automatically applied	Check this box to enable this promotion to be automatically applied to transactions when the SuitePromotions feature is enabled.
Discount Item for Accounting	Select the discount item you want to assign to this promotion. The account on the discount item is impacted by the promotion’s discount. This field is mandatory but required for only accounting purposes.

What the Customer Needs to Buy

In the What the customer needs to buy section, you set the Buy conditions for the promotion. These determine what the customer must add to a transaction to be eligible for the discount provided by the promotion.

Note: Item promotions can contain eligibility criteria for a minimum order amount and a specific item or items, for example, a customer must spend at least $100 and buy a blue scarf. A transaction will only be eligible for a promotion’s discount if it meets all of the criteria. A blue scarf added to the order by a free gift promotion is not taken into consideration for eligibility.



Field	Description
Buy Anything	Select this option if you do not want to specify any Buy conditions. The eligibility of the promotion will not depend on what the customer buys.
Spend a Minimum Order Amount or Buy Specific Items	Select this option if you want to specify Buy conditions. The Minimum Order Amount and Specific Items boxes will appear.
Minimum order Amount	Check this box if you want to specify a minimum order amount that must be spent before a transaction is eligible for the promotion.
Specific Items	Check this box if you want to specify an item or items that must be bought before a transaction is eligible for the promotion. The Item and Item Saved Search lists appear.

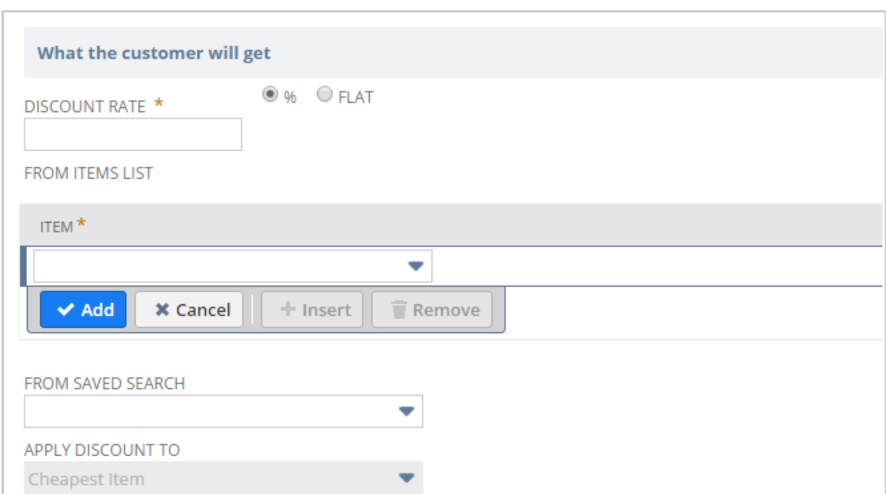
Field	Description
	Free gift items added to the order by a free gift promotion are not taken into consideration for eligibility.
From Items List	Select an item or items from the Item list that must be bought before a transaction is eligible for the promotion.
From Saved Search	Select an item saved search from the From Saved Search list that must be bought before a transaction is eligible for the promotion. Saved searches can be created to group specific items together. For example, all the dresses to be discounted in the Spring Sale. For more information, see the help topic Saved Searches. When you use an item saved search, the Saved Search Preferences subtab appears on the promotion record. For more information, see Saved Search Performance.
Apply the discount every time the following number of units are bought at full price	Check this box to require that a specific quantity of the item must be bought at full price before the discount is applied.
Units	Enter how many units the customer has to buy at full price to get an additional unit for a discounted amount. For example, enter 2 to set up “Buy 2, Get 1” or “Buy 3 for the price of 2” promotions.

What the Customer Will Get

In the What the customer will get section, you set the Get conditions for the promotion. The options available vary depending on the promotion type.

Item Promotion Get Conditions

Item promotions specify an item or items that will be discounted in the What the Customer Will Get section.

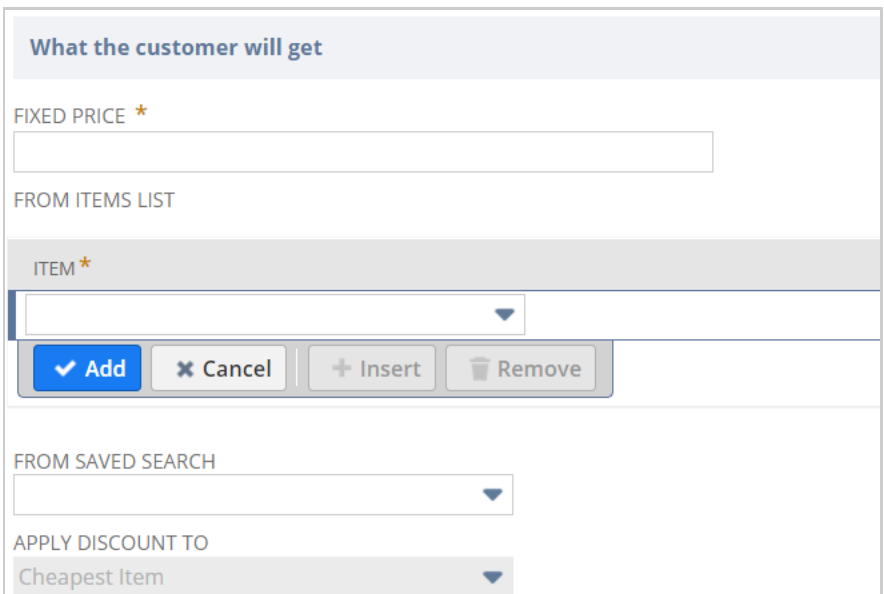


Field	Description
%	Select this option to give the customer a percentage off the selected item or items.
Flat	Select this option to give the customer a flat rate discount off the selected item or items.

Field	Description
Discount Rate	Enter the amount to be discounted. This will either be a percentage or a currency amount depending on the type of discount selected with the previous options.
From Items List	Select an item or items from the Item list that the discount will be applied to.
From Saved Search	Select an item saved search from the From Saved Search list. The discount will be applied to one or more of the items included in the saved search if they are added to an eligible transaction. Saved searches can be created to group specific items together. For example, all the dresses to be discounted in the Spring Sale. For more information, see the help topic Saved Searches. When you use an item saved search, the Saved Search Preferences subtab appears on the promotion record. For more information, see Saved Search Performance.
Apply Discount To	This option is visible when the **Apply the discount every time the following number of units are bought at full price** box is checked. You must select if the discount is applied to the cheapest or most expensive items in the transaction.

Fixed Price Item Promotion Get Conditions

Fixed price item promotions specify items that will be available at a fixed price in the What the Customer Will Get section.

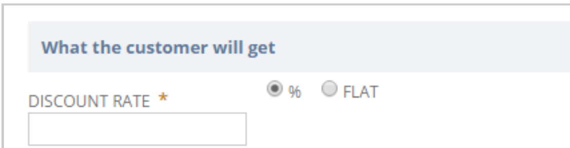


Field	Description
Fixed Price	Enter the amount of the fixed price for the selected item.
From Items List	Select an item or items from the Item list that the discount will be applied to.
From Saved Search	Select an item saved search from the From Saved Search list. The discount will be applied to one or more of the items included in the saved search if they are added to an eligible transaction. Saved searches can be created to group specific items together. For example, all the dresses to be discounted in the Spring Sale. For more information, see the help topic Saved Searches. When you use an item saved search, the Saved Search Preferences subtab appears on the promotion record. For more information, see Saved Search Performance.

Field	Description
Apply Discount To	This option is visible when the **Apply the discount every time the following number of units are bought at full price** box is checked. You must select if the discount is applied to the cheapest or most expensive items in the transaction.

Order Promotion Get Conditions

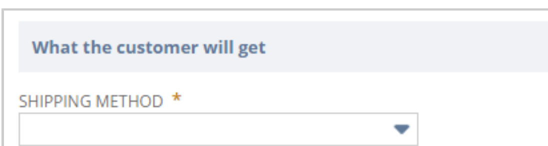
Order promotions specify a percentage or a currency amount discount that will be applied to an order in the What the Customer Will Get section.



Field	Description
%	Select this option to give the customer a percentage off the order.
Flat	Select this option to give the customer a flat rate discount off the order.
Discount Rate	Enter the amount to be discounted. This will either be a percentage or a currency amount depending on the type of discount selected with the previous options.

Shipping Promotion Get Conditions

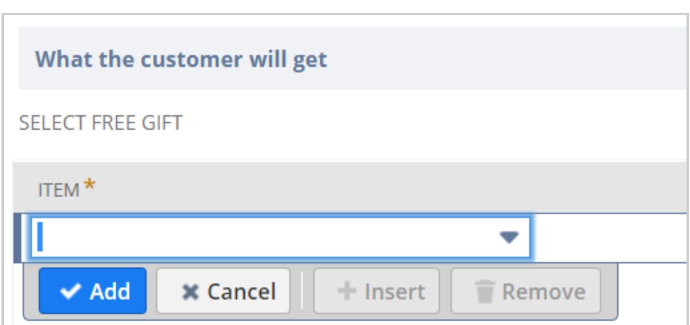
Shipping promotions specify a shipping method that will provide the customer with free shipping on an eligible transaction in the What the Customer Will Get section.



Field	Description
Shipping Method	Select a free shipping method from the list to be applied to eligible transactions.

Free Gift Get Conditions

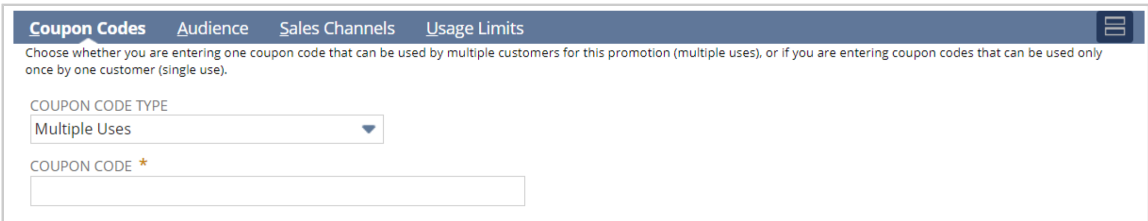
Free gift promotions specify items that will be added automatically to the customer’s order with 100% discount in the What the Customer Will Get section.



Field	Description
Select Free Gift	Select an item from the Item list that the discount will be applied to. Note that you can only select a maximum of one free item. You cannot select parent-matrix items as the free gift.

Associating Coupon Codes With a SuitePromotion

The Coupon Codes subtab is where you choose how many times your coupon codes can be used and where you import or generate coupon codes.



To add coupon codes:

On the **Coupon Codes** subtab:

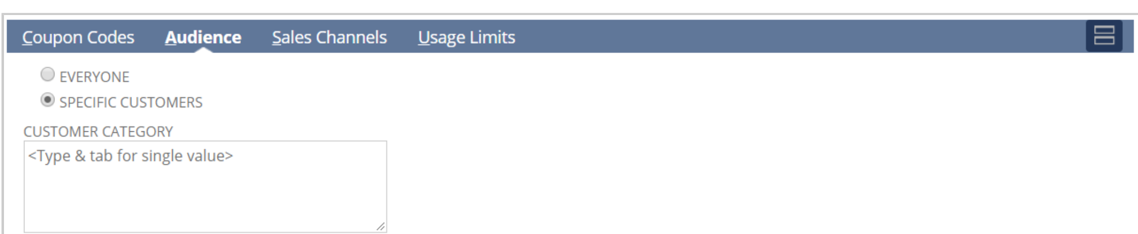
1. In the **Coupon Code Type** field, choose whether the coupon code for this promotion can be used more than one time (Multiple Uses), or can only be used one time (Single Use).
2. If you are entering a multi-use coupon code, enter the code in the **Coupon Code** field.
3. If you are entering single-use coupon codes, do one of the following:
   - Select a CSV file to import
   - Enter a code pattern and the number of codes you want to generate

For more information regarding coupon codes, see Coupon Codes.

Setting Customer Eligibility on SuitePromotions

The Audience subtab is where you select which customers are eligible for the promotion. You can specify if the promotion is available to:

- **Everyone** – select this option to set no restrictions on which customers are eligible for the promotion.
- **Specific Customers** – select this option to limit eligibility for the promotion to specific customer categories, marketing campaigns, or both. You can define new categories and assign customers to them as required.



To limit eligibility for a promotion to a specific customer category:

1. Make sure you have defined your customer categories and that your customers are correctly assigned to them, or that you have defined your marketing campaign and associated this promotion.
2. On the **Audience** subtab select the **Specific Customers** option.
3. Enter each customer category name in the **Customer Category** field.

For more information on how to create customer categories, see the help topic Customer Category.

To limit eligibility for a promotion to a specific marketing campaign:

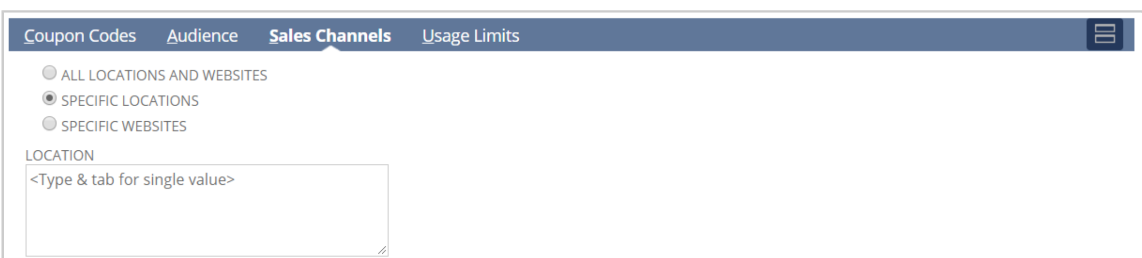
1. Make sure you have defined your marketing campaign and associated this promotion with the campaign.
2. On the **Audience** subtab select the **Specific Customers** option.

> **Note:** You do not need to enter the details of the marketing campaign here. The marketing campaign is associated with the promotion by including it's coupon code in the marketing template.

For more information on how to set up marketing campaigns, see Promotions and Marketing Campaigns.

Setting Sales Channel Eligibility on SuitePromotions

The Sales Channels subtab is where you select if eligibility for the promotion is limited to a specific location, or a specific website.



The Sales Channel subtab does not appear if the Locations feature and SuiteCommerce Advanced are not enabled.

Select the **All Locations and Websites** option to set no restrictions regarding location and website eligibility for the promotion.

See also Enabling Other Features that Impact Promotions.

Limiting Eligibility to Locations

Before you can set location-based promotion eligibility, you must first enable the Locations feature. For more information regarding creating locations and assigning them to transactions, see the help topic *Working with Locations*.

Note: There are limits to the number of promotions that can be automatically applied based on schedule and location. For more information, see Auto-Apply Promotions Limits.

To limit eligibility for a promotion to a specific location:

On the **Sales Channels** subtab:

1. Select the **Specific Locations** option.
2. Enter each location that is eligible for the promotion in the **Location** field that appears.

Limiting Eligibility to Websites

Before you can set website-based promotion eligibility, you must first install and set up the SuiteCommerce Advanced SuiteApp. Only websites created in SuiteCommerce Advanced are eligible for website-based promotion eligibility. For more information regarding creating a SuiteCommerce Advanced website, see the help topic *Creating a Website*.

To limit eligibility for a promotion to a specific website:

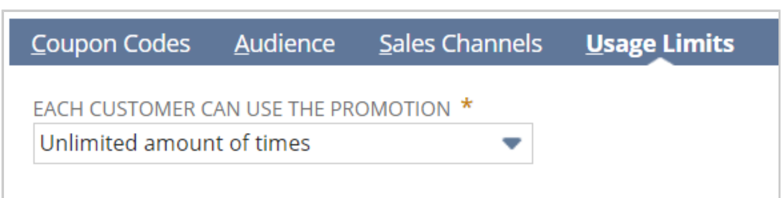
On the **Sales Channels** subtab:

1. Select the **Specific Websites** option.
2. Enter each website that is eligible for the promotion in the **Website** field that appears.

Setting Usage Limits on SuitePromotions

The usage Limits subtab is where you select how many times a customer can use the promotion. You can specify:

- **One time only** – select this option to limit usage of the promotion to one time only per customer.
- **Unlimited amount of times** – select this option to set no restrictions on how many times customers can use the promotion. This is the default behavior.



Note: When multiple sales orders are created from a single estimate, that has a promotion applied to it with one time only usage limits, the usage limits of the promotion are ignored. The promotion will be repeated for the same customer on each of the sales orders created from the estimate. When you make a copy of an estimate rather than creating a sales order, the usage limits of a one time only promotion are respected. A notification informs you that you cannot apply the promotion. For more information regarding estimates, see the Estimates help topic.

Creating Item Promotions

You can create item promotions that give customers discounts on specific items in a transaction.

To create an item promotion:

1. Go to Lists > Marketing > Promotions > New.
2. Select **Item Promotion** from the SuitePromotions category.
3. Enter a name and description for this promotion.
4. Check the **Inactive** box if you want to make the promotion inactive but not deleted. If this box is checked the promotion will not be available for selection on a transaction.
5. Enter a start date and an end date for this promotion.

   After the end date, the promotion will no longer trigger discounts, and will no longer appear in the list of available promotions.
6. Select the combinability options for this promotion. For more information, see SuitePromotions Further Settings.
7. Check the **This promotion can be automatically applied** box if you want this promotion to be automatically applied to transactions.

   In the **Discount Item for Accounting** field, select the discount item you want to assign to this promotion. The account on the discount item is impacted by the promotion's discount. This field is mandatory but only required for accounting purposes.
8. Enter the **Buy** conditions for this promotion. For more information, see What the Customer Needs to Buy.
9. Enter the **Get** conditions for this promotion. For more information, see Item Promotion Get Conditions.
10. Enter coupon code details for this promotion. For more information, see Associating Coupon Codes With a SuitePromotion.
11. Enter usage limits for this promotion. For more information, see Setting Usage Limits on SuitePromotions.
12. Click **Save**. You can also do one of the following:
    - Click **Save & New** to save the form and create a new promotion.
    - Click **Save & Copy** to save the form and create a new promotion with the same data.

Item Promotion Example

Buy One, Get One Free (BOGO)

- **Description** – Customers are eligible for a 100% discount on an additional item when they buy at least two of that item.
- **Tagline** – Buy 1 T-shirt and get 1 T-shirt for free! Or Buy 2 for the price of 1!
- **Small print** – Discount applied to the cheapest T-shirt or T-shirts.

View the How to Create a Buy One Get One Free SuitePromotion video

What the customer needs to buy

The following table shows how to set up the Buy conditions for this type of promotion.

Field	Value
Buy Anything	Clear

Field	Value
Spend a minimum order amount or buy specific items	Select
Minimum Order Amount	–
Specific Items	Select
Item	T-shirt
Apply the discount every time the following number of units are bought at full price	Select
Units	1

What the customer will get

The following table shows how to set up the Get conditions for this type of promotion.

Field	Value
Discount Type	%
Discount Rate	100.00
Items to be discounted	T-shirt
Apply discount to	Cheapest

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirts	$10	–	$10
2 T-shirts	$20	$10 ($10 off the cheapest T-shirt)	$10
3 T-shirts	$30	$10 ($10 off the cheapest T-shirt)	$20
6 T-shirts	$60	$30 ($10 off each of the three cheapest T-shirts)	$30

For many more SuitePromotions examples, please see the SuitePromotions Examples document.

Creating Fixed Price Item Promotions

Fixed price item promotions provide an alternative to offering a currency or percentage discount through a promotion. You can create promotions that offer items at a fixed promotional price.

For example, a promotion that offers any dress for $15 if a customer buys any T-shirt. Rather than entering a discount as a percentage or currency amount, a fixed price for the dress is entered. If the promotion is applied to an order that meets these criteria, the dress price is modified by calculating the amount of discount required to provide the dress for $15.

To create a fixed price item promotion:

1. Go to Lists > Marketing > Promotions > New.

2. Select **Fixed Price Item Promotion** from the SuitePromotions category.
3. Enter a name and description for this promotion.
4. Check the **Inactive** box if you want to make the promotion inactive but not deleted. If this box is checked the promotion will not be available for selection on a transaction.
5. Enter a start date and an end date for this promotion.

   After the end date, the promotion will no longer trigger discounts, and will no longer appear in the list of available promotions.
6. Select the combinability options for this promotion. For more information, see SuitePromotions Further Settings.
7. Check the **This promotion can be automatically applied** box if you want this promotion to be automatically applied to transactions.
8. In the **Discount Item for Accounting** field, select the discount item you want to assign to this promotion. The account on the discount item is impacted by the promotion's discount. This field is mandatory but only required for accounting purposes.
9. Enter the **Buy** conditions for this promotion. For more information, see What the Customer Needs to Buy.
10. Enter the **Get** conditions for this promotion. For more information, see Fixed Price Item Promotion Get Conditions.
11. Enter coupon code details for this promotion. For more information, see Associating Coupon Codes With a SuitePromotion.
12. Enter usage limits for this promotion. For more information, see Setting Usage Limits on SuitePromotions.
13. Click **Save**. You can also do one of the following:
    - Click **Save & New** to save the form and create a new promotion.
    - Click **Save & Copy** to save the form and create a new promotion with the same data.

Fixed Price Item Promotion Example

Buy Items for a Discounted Fixed Price

- **Description** – Customers are eligible to buy any number of the same item for a fixed price without any buy conditions.
- **Tagline** – All T-shirts now only $8!

What the customer needs to buy

The following table shows how to set up the Buy conditions for this type of promotion.

Field	Value
Buy Anything	Select
Spend a minimum order amount or buy specific items	Clear
Minimum Order Amount	Clear
Specific Items	Clear
Item	–
Apply the discount every time the following number of units are bought at full price	Clear

Field	Value
Units	–

What the customer will get

The following table shows how to set up the Get conditions for this type of promotion.

Field	Value
Fixed Price	8.00
Items to be discounted	T-shirt
Apply discount to	–

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirt	$10	$2	$8
2 T-shirts	$20	$4 ($2 off each T-shirt)	$16
3 T-shirts	$30	$6 ($2 off each T-shirt)	$24
6 T-shirts	$60	$12 ($2 off each T-shirt)	$48

For many more SuitePromotions examples, please see the SuitePromotions Examples document.

Creating Order Promotions

You can create order promotions that give customers discounts that are applied to the order total.

To create an order promotion:

1. Go to Lists > Marketing > Promotions > New.
2. Select **Order Promotion** from the SuitePromotions category.
3. Enter a name and description for this promotion.
4. Check the **Inactive** box if you want to make the promotion inactive but not deleted. If this box is checked the promotion will not be available for selection on a transaction.
5. Enter a start date and an end date for this promotion.

   After the end date, the promotion will no longer trigger discounts, and will no longer appear in the list of available promotions.
6. Select the combinability options for this promotion. For more information, see SuitePromotions Further Settings.
7. Check the **This promotion can be automatically applied** box if you want this promotion to be automatically applied to transactions.
8. In the **Discount Item for Accounting** field, select the discount item you want to assign to this promotion. The account on the discount item is impacted by the promotion's discount. This field is mandatory but only required for accounting purposes.

9. Enter the **Buy** conditions for this promotion. For more information, see What the Customer Needs to Buy.
10. Enter the **Get** conditions for this promotion. For more information, see Order Promotion Get Conditions.
11. Enter coupon code details for this promotion. For more information, see Associating Coupon Codes With a SuitePromotion.
12. Enter usage limits for this promotion. For more information, see Setting Usage Limits on SuitePromotions.
13. Click **Save**. You can also do one of the following:
    - Click **Save & New** to save the form and create a new promotion.
    - Click **Save & Copy** to save the form and create a new promotion with the same data.

Order Promotion Example

Flat Rate Discount on an Order if Minimum Order Amount is Met

- **Description** – Customers are eligible for a flat rate discount on any order over a certain value.
- **Tagline** – $10 off your order, when you spend $50 or more!

What the customer needs to buy

The following table shows how to set up the Buy conditions for this type of promotion.

Field	Value
Buy Anything	Clear
Spend a minimum order amount or buy specific items	Select
Minimum Order Amount	50.00
Specific Items	Clear
Item	–

What the customer will get

The following table shows how to set up the Get conditions for this type of promotion.

Field	Value
Discount Type	Flat
Discount Rate	10.00

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirt, 1 dress	$30	–	$30
2 T-shirts, 1 dress	$40	–	$40

What the customer buys	Price before discount	Discount	Price after discount
3 T-shirts, 1 dress	$50	$10	$40
6 T-shirts, 2 dresses	$100	$10	$90

For many more SuitePromotions examples, please see the SuitePromotions Examples document.

Creating Shipping Promotions

You can create shipping promotions that give customers free shipping for their transactions using a specified shipping method.

To create a shipping promotion:

1. Go to Lists > Marketing > Promotions > New.
2. Select **Shipping Promotion** from the SuitePromotions category.
3. Enter a name and description for this promotion.
4. Check the **Inactive** box if you want to make the promotion inactive but not deleted. If this box is checked the promotion will not be available for selection on a transaction.
5. Enter a start date and an end date for this promotion.

   After the end date, the promotion will no longer trigger discounts, and will no longer appear in the list of available promotions.
6. Select the combinability options for this promotion. For more information, see SuitePromotions Further Settings.
7. Check the **This promotion can be automatically applied** box if you want this promotion to be automatically applied to transactions.
8. Enter the **Buy** conditions for this promotion. For more information, see What the Customer Needs to Buy.
9. Enter the **Get** conditions for this promotion. For more information, see Shipping Promotion Get Conditions.
10. Enter coupon code details for this promotion. For more information, see Associating Coupon Codes With a SuitePromotion.
11. Enter usage limits for this promotion. For more information, see Setting Usage Limits on SuitePromotions.
12. Click **Save**. You can also do one of the following:
    - Click **Save & New** to save the form and create a new promotion.
    - Click **Save & Copy** to save the form and create a new promotion with the same data.

Shipping Promotion Example

Free Shipping if a Specific Item is Included in the Order

- **Description** – Customers are eligible for free shipping when they buy a minimum number of a specific item.
- **Tagline** – Buy a T-shirt and get free shipping on your order!

What the customer needs to buy

The following table shows how to set up the Buy conditions for this type of promotion.

Field	Value
Buy Anything	Clear
Spend a minimum order amount or buy specific items	Select
Minimum Order Amount	Clear
Specific Items	Select
Item	T-shirt

What the customer will get

The following table shows how to set up the Get conditions for this type of promotion.

Field	Value
Shipping Method	Select any available shipping method from the list (the selected shipping method will be free for any eligible order).

For many more SuitePromotions examples, please see the SuitePromotions Examples document.

Creating Free Gift Promotions

You can create free gift promotions that give customers an item with 100% discount. The free gift is automatically added to the customer's order if the transaction is eligible.

View the Free Gifft SuitePromotion video

> **Note:** Free gift promotions cannot be made exclusive, nor can they be excluded by other exclusive promotions.

To create a free gift promotion:

1. Go to Lists > Marketing > Promotions > New.
2. Select **Free Gift Promotion** from the SuitePromotions category.
3. Enter a name and description for this promotion.
4. Check the **Inactive** box if you want to make the promotion inactive but not deleted. If this box is checked the promotion will not be available for selection on a transaction.
5. Enter a start date and an end date for this promotion.

   After the end date, the promotion will no longer trigger discounts, and will no longer appear in the list of available promotions.
6. Check the **This promotion can be automatically applied** box if you want this promotion to be automatically applied to transactions.
7. Enter the **Buy** conditions for this promotion. For more information, see What the Customer Needs to Buy.
8. Enter the **Get** conditions for this promotion. For more information, see Free Gift Get Conditions.

9. Enter coupon code details for this promotion. For more information, see Associating Coupon Codes With a SuitePromotion.
10. Enter usage limits for this promotion. For more information, see Setting Usage Limits on SuitePromotions.
11. Click **Save**. You can also do one of the following:
    - Click **Save & New** to save the form and create a new promotion.
    - Click **Save & Copy** to save the form and create a new promotion with the same data.

Free Gift Promotion Example

Free Gift With Any Order

- **Description** – Customers are eligible for a free gift with any order.
- **Tagline** – Get a free T-shirt with any order!

What the customer needs to buy

The following table shows how to set up the Buy conditions for this type of promotion.

Field	Value
Buy Anything	Select
Spend a minimum order amount or buy specific items	Clear
Minimum Order Amount	Clear
Specific Items	Clear
Item	–
Apply the discount every time the following number of units are bought at full price	Clear
Units	–

What the customer will get

The following table shows how to set up the Get conditions for this type of promotion.

Field	Value
Free Gift	T-shirt Note, you cannot add parent matrix items as a free gift.

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Free gifts	Price after discount
1 T-shirt	$10	1 T-shirt	$10 (the T-shirt in the order is not discounted, an extra T-shirt is added to the order)
1 dress	$20	1 T-shirt	$20

What the customer buys	Price before discount	Free gifts	Price after discount
1 T-shirt, 1 dress	$30	1 T-shirt	$30 (the T-shirt in the order is not discounted, an extra T-shirt is added to the order)
2 T-shirts, 1 dress	$40	1 T-shirt	$40 (the T-shirts in the order are not discounted, an extra T-shirt is added to the order)

For many more SuitePromotions examples, please see the SuitePromotions Examples document.

Creating Standard Promotions

You can continue to create and apply standard promotions to a transaction, but remember they are not compatible with the Enhancements Introduced in SuitePromotions. For more information, see Migrating to SuitePromotions.

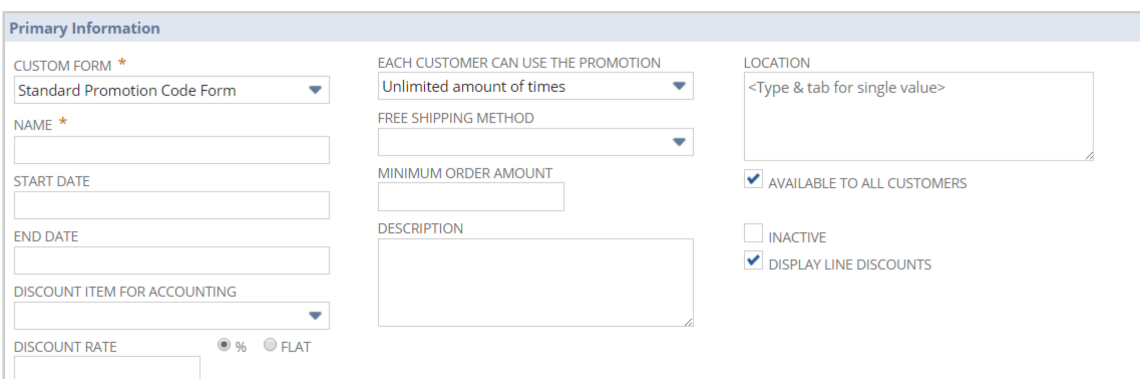
The standard promotion record contains the following sections:

- **Primary Information** – see Standard Promotions Primary Information.
- **Coupon Codes subtab** – see Associating Coupon Codes With a Standard Promotion.
- **Items subtab** – see Discounting Items With Standard Promotions.
- **Partners subtab** – see Associating Partners With a Standard Promotion.

For details regarding how to create a standard promotion, see Creating a Standard Promotion.

Standard Promotions Primary Information

This section provides the majority of details needed to set up the promotion, excluding those pertaining to coupon codes, and items or specific partners that will receive the discount.



Field	Description
Custom Form	Select the promotion type. You can select one of the Suite promotion types (item, order, or shipping) or the Standard Promotion Code Form.
Name	Enter a name for the promotion.
Start Date	Enter the date from when the promotion is valid.
End Date	Enter the date after which the promotion is no longer valid.

Field	Description
Discount Item for Accounting	Select the discount item from the list. The account on the discount item is impacted by the promotion's discount. This field is mandatory but only required for accounting purposes.
%	Select this option to give the customer a percentage off the order.
Flat	Select this option to give the customer a flat rate discount off the order.
Discount Rate	Enter the amount to be discounted. This will either be a percentage or a currency amount depending on the type of discount selected with the previous options.
Each Customer Can use the Promotion	Select how many times a customer can use this promotion. Select from: ■ One time only ■ Unlimited amount of times
Free Shipping Method	Select a shipping method here to create a free shipping promotion.
Minimum Order Amount	Enter the amount that the customer must spend before the promotion becomes valid. If you use the Multiple Currencies feature, a subtab appears where you can set a different minimum order amount for each currency in which you do business.
Description	Enter a description of the promotion.
Location	Limit the eligibility of the promotion to one or more locations by entering the name of each location in this field. For more information, see Setting Where Promotions Can Be Used.
Available to All Customers	Check this box if you want this promotion's coupon codes to be able to be applied to transactions for any customer, even if a specific partner or marketing campaign has been designated for this promotion. If you prefer to make the promotion available to only a specific partner or marketing campaign, clear this box.
Inactive	Check this box to make this promotion inactive but not deleted. The promotion will not be available for selection on a transaction.
Display Line Discounts	Check this box if you want the following: ■ the discount for this promotion to show as a line item on transactions ■ to display strikethrough pricing in the shopping cart on web store orders

Note: When the Display Line Discounts box is checked, the discount total will not be shown in the order summary. When the box is cleared, the promotion discount will be shown only in the transaction-level total.

If there are no items on the Items subtab, the promotion will be applied at the transaction level, regardless of whether the Display Line Discounts box is checked or not.

Associating Coupon Codes With a Standard Promotion

The Coupon Codes subtab is where you choose how many times your coupon codes can be used and where you import or generate coupon codes.

To add coupon codes:

On the **Coupon Codes** subtab:

1. In the **Coupon Code Type** field, choose whether the coupon code for this promotion can be used more than one time (Multiple Uses), or can only be used one time (Single Use).

2. If you are entering a multi-use coupon code, enter the code in the **Coupon Code** field.
3. If you are entering single-use coupon codes, do one of the following:
   - Select a CSV file to import
   - Enter a code pattern and the number of codes you want to generate

For more information regarding coupon codes, see Coupon Codes.

Discounting Items With Standard Promotions

If you are associating a discount with a standard promotion and want the discount to apply only to certain items, select those items on the Items subtab.

To add a discount to specific items:

1. Click the **Items** subtab.
2. Click **Add Multiple** to select multiple items at the same time and add them to this list.

   When you attach items to a promotion with a discount, the code acts as an item coupon. Customers receive the discount only if they purchase the associated item or items.
3. You can also use this subtab to exclude items that you do not want to discount. Check the **Exclude Items** box to have the promotion and discount apply to all items except those you select here.

   Line discount promotions must include items on the **Items** subtab.

Associating Partners With a Standard Promotion

If a customer is associated with a partner, only that partner's promotions are available to the customer. Consider the following:

- A promotion can be created without associating it with a partner, making that promotion available to all customers not associated with a partner.
- A promotion can be added to a partner record, making that promotion available to all customers associated with that partner.
- Partners can be named on a promotion record, making that promotion available to only those customers associated with those partners.

  You can assign promotional discounts and associate them with partners. When you create sales transactions for customers tied to a partner, you can apply that partner's promotions. If you apply a promotion that has a discount attached to it, that discount appears in the Discount field and is deducted from the total.

The Partners subtab is where you choose specific partners to be associated with the promotion.

To add Partners to a promotion:

1. Click the **Partners** subtab.
2. In the **Partner** column, select a partner from the list you want to associate with this promotion.
3. Click **Add**.
4. Repeat these steps for each partner you want to associate with this promotion.

5. Click **Save**.

Now, you can assign this promotion to lead, prospect, and customer records.

> **Important:** Make sure the Available to all customers box on the promotion form is not selected If you wish to make the promotion available to a specific partner. For more information, see Standard Promotions Primary Information.

Creating a Standard Promotion

You can create standard promotions to track special offers and marketing initiatives.

To create a standard promotion:

1. Go to Campaigns > Marketing > Promotions > New.
2. Enter a name, description, start date, and an end date for this promotion.

   After the end date, the promotion will no longer trigger discounts, and will no longer appear in the list of available promotions.
3. In the **Discount Item for Accounting** field, select the discount item you want to assign to this promotion. The account on the discount item is impacted by the promotion's discount. This field is mandatory but only required for accounting purposes.
4. In the **Discount Rate** field, enter the percentage discount or flat rate discount to be applied.

   > **Note:** The **Rate** field automatically fills with the rate of the discount item selected in the **Discount** field. This value can be can be overridden as needed.
5. In the **Each customer can use the promotion** field, choose one of the following:
   - **Unlimited amount of times** - the discount can be applied to multiple sales.
   - **One time only** - the discount can be used only one time by each customer.
6. The **Free Shipping Method** list includes all the shipping items available in your account. Select a shipping method here to create a free shipping promotion.

   The price of the shipping method you select is discounted from the order total after the customer enters the coupon code on a sales transaction or a web order.
7. In the **Minimum Order Amount** field, enter the amount that the customer must spend before the promotion becomes valid.

   If you use the **Multiple Currencies** feature, a subtab appears where you can set a different minimum order amount for each currency in which you do business.
8. Check the **Available to All Customers** box if you want this promotion's coupon codes to be able to be applied to transactions for any customer.
9. Check the **Inactive** box if you want to make the promotion inactive but not deleted. If this box is checked the promotion will not be available for selection on a transaction.
10. Check the **Display line discounts** box if you want the following:
    - the discount for this promotion to show as a line item on transactions
    - to display strikethrough pricing in the shopping cart on web store orders

    If you clear this box, the promotion discount will be shown only in the transaction-level total.

    A flat rate promotion code applies to the entire order.

    You must select items on the **Items** subtab of the promotion to use line discounts.

> **Note:** If you use line discount promotions, when you apply the promotion to a transaction, you must click **Calculate** to create the discount line before saving the transaction. Line discount promotions are not compatible with web services endpoints 2009.2 or earlier.

When you apply promotions to sales transactions, the correct discount appears in the **Discount** field on transactions. You can change or remove the discount from a transaction.

11. Enter coupon code details for this promotion. For more information, see Associating Coupon Codes With a Standard Promotion.
12. Enter details of any items that will be discounted with this promotion. For more information, see Discounting Items With Standard Promotions.
13. Enter details of specific partners that are eligible for this promotion. For more information, see Associating Partners With a Standard Promotion.
14. Click **Save**. You can also do one of the following:
    - Click **Save & New** to save the form and create a new promotion.
    - Click **Save & Copy** to save the form and create a new promotion with the same data.

Standard Promotion Example

Flat Rate Discount on a Specific Item if Minimum Order Amount is Met

- **Description** – Customers are eligible for a $5 off T–shirts when they spend $20 or more.
- **Tagline** – Spend $20, and get $5 off T-shirts!

What the customer needs to buy

The following table shows how to set up the Buy conditions for this type of promotion.

Field	Value
Minimum Order Amount	20.00

What the customer will get

The following table shows how to set up the Get conditions for this type of promotion.

Field	Value
Discount Type	Flat
Discount Rate	5.00
On the **Items** subtab in the Items list	T-shirt

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirt	$10	-	$10
1 dress	$20	-	$20

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirt, 1 dress	$30	$5 ($5 off the T-shirt)	$25
4 T-shirts, 1 dress	$60	$20 ($5 off each T-shirt)	$40

Creating Advanced Promotions

You can continue to create and apply Advanced Promotions to a transaction, but remember they are not compatible with the Enhancements Introduced in SuitePromotions. For more information, see Migrating to SuitePromotions.

With the Advanced Promotions SuiteApp, you can create promotions that offer discounts on specific items or on order totals. You can also offer discounted shipping based on order criteria.

The Advanced Promotions SuiteApp also enables you to create tiered promotions that offer discounts that depend on which tier an order qualifies for. Tiers can be based on the number of items sold as well as on item or order totals.

Advanced Promotion Types

There are three types of promotions available with the Advanced Promotions SuiteApp:

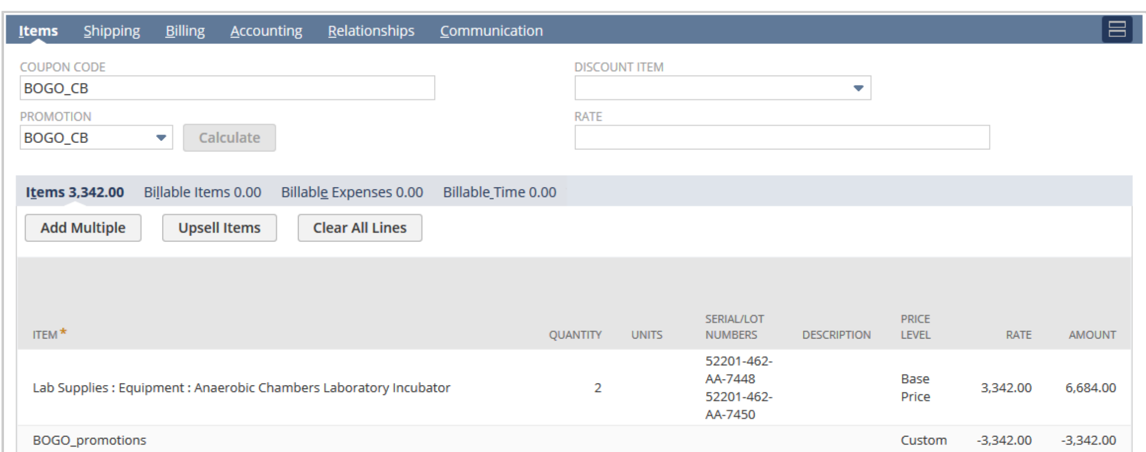
- **Item-based promotions**

  After installing the Advanced Promotions SuiteApp, you must enable item-specific promotions. Go to Customization > Plug-ins > Manage Plug-ins > Promotions (Administrator), and then check the **Item Specific Promotion** box.

  With item-based promotions, you can offer percentage or currency amount discounts on items. You can also use this type of promotion to offer discounted shipping.

  Item-based promotions are reflected at the line item level in the shopping cart and on sales transactions.

  See Creating Item-Based Advanced Promotions.



- **Buy X, Get Y promotions**

  After installing the Advanced Promotions SuiteApp, you must enable Buy X, Get Y promotions. Go to Customization > Plug-ins > Manage Plug-ins > Promotions (Administrator), and then check the **Buy X Get Y promotion** box.

Buy X, get Y promotions offer free items when certain order criteria are fulfilled. This includes “buy one, get one free” and similar discounts.

Buy X, Get Y promotions are reflected at the line item level in the shopping cart and on sales transactions.

See Creating Buy X, Get Y Advanced Promotions.

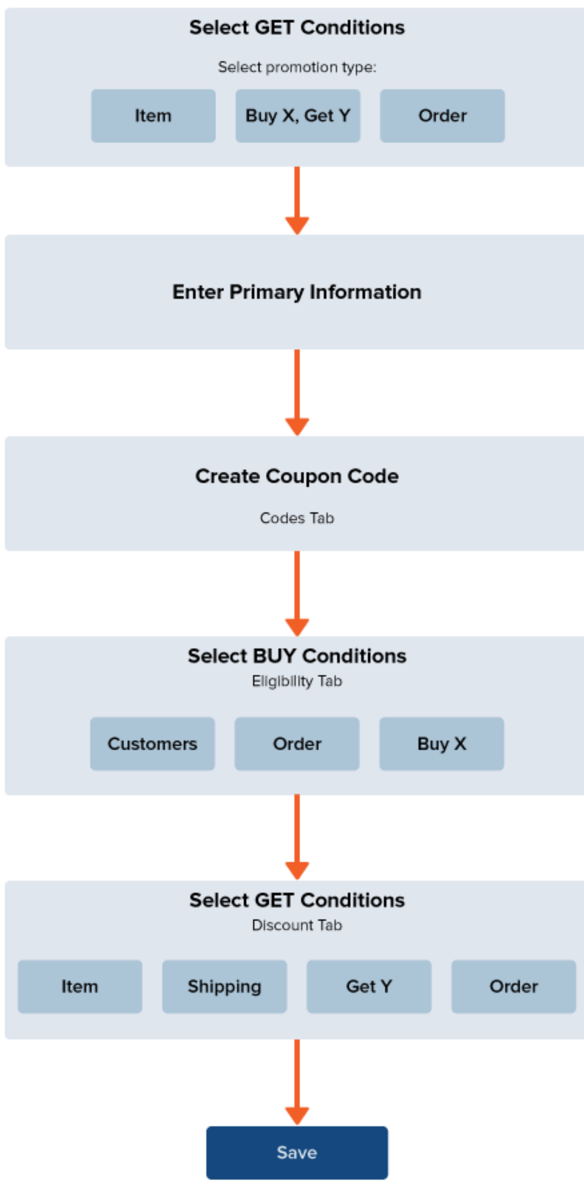
- **Order-based promotions**

  Order-based promotions offer percentage or currency discounts at the order level and can be based on the order total or on items included in the order. You can also offer discounted shipping.

  Order-based discounts are reflected in the order summary on sales transactions and website orders.

  See Creating Order-Based Advanced Promotions.

The basic workflow for creating Advanced Promotions is as follows:



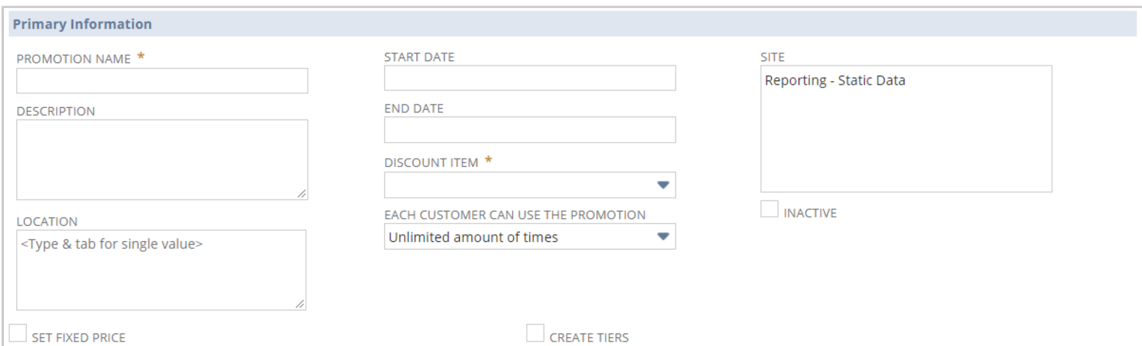
Each type of Advanced Promotion follows the same workflow. You select the promotion type, enter primary information, create a coupon code, enter the Buy conditions, and finally, specify further Get conditions. The main variation in the process occurs at stage five, where the get conditions available differ depending on the type of promotion.

The promotion records for all Advanced Promotions contain the following sections:

- **Primary Information** – see Advanced Promotions Primary Information.
- **Coupon Codes subtab** – see Associating Coupon Codes With an Advanced Promotion.
- **Eligibility subtab** – see Setting Up Promotion Eligibility for Advanced Promotions.
- **Discount subtab** – see Creating Promotion Discounts for Advanced Promotions.

Advanced Promotions Primary Information

This section provides the basic details needed to set up an Advanced Promotion, excluding those pertaining to coupon codes, eligibility, and discount.



Field	Description
Promotion Name	Enter a name for the promotion.
Description	Enter a description of the promotion.
Location	Limit the eligibility of the promotion to one or more locations by entering the name of each location in this field. For more information, see Setting Where Promotions Can Be Used.
Start Date	Enter the date from when the promotion is valid.
End Date	Enter the date after which the promotion is no longer valid.
Discount Item	Select the discount item from the list. The account on the discount item is impacted by the promotion’s discount. This field is mandatory but only required for accounting purposes.
Each Customer Can use the Promotion	Select how many times a customer can use this promotion. Select from: ■ One time only ■ Unlimited amount of times
Site	Limit the eligibility of the promotion to one or more web sites by entering the name of each web site in this field. For more information, see Setting Where Promotions Can Be Used.
Inactive	Check this box to make this promotion inactive but not deleted. The promotion will not be available for selection on a transaction.

Field	Description
Set Fixed Price	Check this box to create a Fixed Price Advanced Promotion, see Creating Fixed Price Advanced Promotions.
Create Tiers	Check this box to create a Tiered promotion, see Creating Tiered Promotions.

Associating Coupon Codes With an Advanced Promotion

The Coupon Codes subtab is where you choose how many times your coupon codes can be used and where you import or generate coupon codes.

To add coupon codes:

On the **Coupon Codes** subtab:

1. In the **Coupon Code Type** field, choose whether the coupon code for this promotion can be used more than one time (Multiple Uses), or can only be used one time (Single Use).
2. If you are entering a multi-use coupon code, enter the code in the **Coupon Code** field.
3. If you are entering single-use coupon codes, do one of the following:
   - Select a CSV file to import
   - Enter a code pattern and the number of codes you want to generate

For more information regarding coupon codes, see Coupon Codes.

Setting Up Promotion Eligibility for Advanced Promotions

You set a promotion's eligibility requirements on the Eligibility subtab of the promotion record. A promotion can be applied only to an order that meets these eligibility requirements.

First, you choose which customers are eligible for the promotion. You can set criteria based on customer saved searches, or you can choose specific customers.

If you are creating a tiered promotion, you set up the tiers on the Order subtab under the Eligibility subtab.

> **Note:** If you make no changes to the settings on the Eligibility subtab, the promotion can be applied to any order by any customer.

To choose which customers are eligible for a promotion:

1. Click the **Eligibility** subtab.

   The **Customers** subtab is where you choose which customers are eligible for the promotion. You add criteria in the form of saved searches or select lists of customers.
2. In the **Apply** field select one of the following:
   - **If customer matches any criterion** – Select this option if a customer must be included in only one of the searches or lists you add below to be eligible.
   - **If customer matches all criteria** – Select this option if a customer must be included in all of the searches and lists you add below to be eligible for this promotion.
3. In the **Add Customer Criteria** field, choose one of the following:
   - **Select Customers** – to select specific customers to add to the eligibility subtab.

     In the **Customer ID** field, select the customers you want to add to the list of criteria. Press and hold CTRL to select multiple customers.

- **Select Customer Saved Search** – to add an existing customer saved search to the list.

  In the **Customer Segment** field, select the customer saved search you want to add to the list of criteria. You can only choose public searches for criteria.

  > **Note:** Because these customers are defined by saved search criteria, the list of eligible customers can change. If you are distributing coupon codes to a recipient group, be sure that you use the same saved search to define the campaign recipients that you use for customer eligibility.

- **Create New Customer Search** – to create a new customer saved search to add to the list of criteria.

  Create a saved search to add to the list of criteria. You can choose only public searches for criteria.

4. In the popup window, click **Save**.
5. Repeat steps 3 and 4 for each customer criterion you want to add.

Next, you can select order requirements for eligibility.

To set requirements for the orders that are eligible for the promotion:

1. Click the **Eligibility** subtab, click the **Order** subtab if you are creating an item- or order-based promotion. Click the **Buy X** subtab if you are creating a Buy X, Get Y promotion.

   On this subtab, you can set the order requirements for this promotion. These criteria can be based on the order total, on the number of items purchased, or the line item amount for an item or items. For Buy X, Get Y promotions, you can only a limit based on the total number of units purchased.

2. In the **Apply** field select one of the following:
   - **If order matches any criterion** – Select this option if an order must only meet one of the criteria you add below to be eligible.
   - **If order matches all criteria** – Select this option if the promotion is eligible if all of the item criteria you list below are met. Select this option if an order must be included in all of the searches and lists you add below to be eligible for this promotion.

   > **Note:** This field is not available for tiered promotions.

3. In the **Add Order Criteria** field (item- and order-based promotions) or the **Add Buy X Criteria** field (Buy X, Get Y promotions), choose one of the following:
   - **Set Order Total** – to set order criteria based on the order total or on the total number of units purchased.
   - **Select Items** – to set criteria based on specific items.

     In the **Items** field, select the items you want to base your order criteria on, and then enter the minimum purchase requirement for the items you selected. Click **Add Another** to add items for this criterion.

     Then enter the minimum purchase for those items. This can be either a currency amount or a number of units.
   - **Select Item Saved Search** – to add criteria for the items in an existing item saved search.

     In the Item Saved Search field, select the item saved search you want to base criteria on.

     Then enter the minimum purchase for those items. This can be either a currency amount or a number of units.
   - **Create New Item Saved Search** – to create a new item saved search to add to the list

Create a saved search to add to the list of criteria, and set the minimum purchase quantity (units) or currency amounts for the items in the search.

> **Note:** You can choose only public searches for criteria.
>
> You cannot use an item saved search that has grouped or summarized results, see the help topic Defining Summary Types to Roll Up Search Results.

If you use the **Multiple Currencies** feature, you can add minimum purchase amounts for each currency you do business in.

4. In the popup window, click **Save**.
5. Repeat steps 3 and 4 to add order criteria.

   If you are creating a tiered promotion, enter the criteria for each tier.
6. Click **Save**.

Creating Promotion Discounts for Advanced Promotions

After you have entered the primary information and set the eligibility criteria, you can set up the promotion discount. The discount options available depend on the type of promotion you are creating:

- Creating Item-Based Advanced Promotions
- Creating Item-Based Shipping Advanced Promotions
- Creating Buy X, Get Y Advanced Promotions
- Creating Order-Based Advanced Promotions
- Creating Tiered Promotions
- Creating Fixed Price Advanced Promotions

Creating Item-Based Advanced Promotions

Item-based promotions enable you to offer discounts on items included in an order. These promotions create line-level discounts for each item defined on the promotion.

Item-based promotions may include the following:

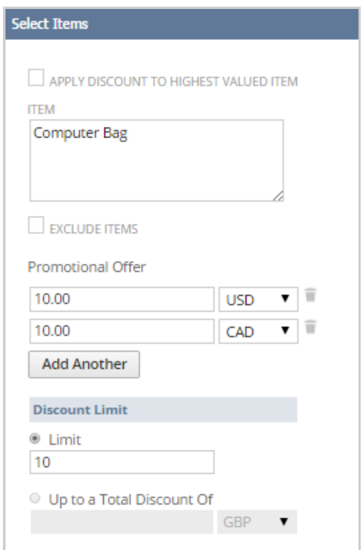
- A percentage or amount off an item or items (for example, 40% off all laptops).
- A percentage or amount off an item items, if certain order criteria are met (for example, “buy one, get one free” or “50% off monitors on orders over $600).
- An item-specific promotional discount for a segment of customers (for example, customers who registered in the last twelve months get 20% off desktop computers).
- A promotional discount off an item or items for a segment of customers, if certain order criteria are met (for example, customers who registered in the last month who buy one item, get another free).
- A discount on the price and shipping cost of an item or items (20% off the total and free shipping on all computer monitors).

> **Note:** You can only have one item discount and one shipping discount per promotion.

To create an item-based promotion:

1. Go to Campaigns > Marketing > Promotions > New.

2. Select **Item-Based Promotions** from the Standard Promotions and Advanced Promotions category.
3. Enter the primary information for this promotion, see Advanced Promotions Primary Information.
4. On the **Codes** subtab, set up the coupon codes for the promotion. For more information, see Associating Coupon Codes With an Advanced Promotion.
5. On the **Eligibility** subtab, set up the eligibility criteria for the promotion. For more information, see Setting Up Promotion Eligibility for Advanced Promotions.
6. Click the **Discount** subtab.
7. In the **Add Item Discount** field, choose the item you are offering a discount on in one of the following ways:
   - **Select Items** – Select the items you want to offer a discount on. Click **Add Another** to select additional items.



   - **Select Saved Search** – Choose an existing item saved search that includes the items you are offering a discount on.
   - **Create New Item Saved Search** – Create an item saved search that includes the items you are offering a discount on.

> **Note:** You can choose only public searches to define discounts.

8. In the popup, check the **Apply Discount to Highest Valued Item** option to apply the discount to the most expensive item in the order. Clear this box to apply the discount to the least expensive item on the order.

> **Important:** This setting only affects promotions with defined unit limits.

9. Check the **Exclude Items** box to apply the promotion and discount to all items on the order, except those you select here. This option is useful when you have a large number of products on sale, and you want to exclude only a few items from the promotional discount.
10. In the **Promotional Offer** field, enter the percentage or amount off for those items. Click **Add Another** if you want to enter a maximum discount amount in additional currencies.
11. If you want to limit the promotion amount, do one of the following:

- **Limit** – Enter the maximum number (units) of items you are offering the discount on. This is required if you want to apply the discount to the highest value item on the order.
- **Up to a Total Discount of** – Enter the maximum currency amount discount this promotion gives. If you use the **Multiple Currencies** feature, you can enter the maximum discount in any currency you do business in.

12. Click **Save**.

To add a shipping discount, choose from the options provided in the Add Shipping Discount field. For more information, see Creating Item-Based Shipping Advanced Promotions.

Item-Based Advanced Promotion Example

Flat Rate Discount on one Item – Advanced Promotions

- **Description** – Customers are eligible for a flat rate discount on an item when they buy a different item.
- **Tagline** – Buy a T-shirt and get $5 off a dress!

What the customer needs to buy

The following table shows how to set up the Buy conditions for this type of promotion with the Advanced Promotions SuiteApp.

Field	Value
On the **Eligibility** tab click the **Order** subtab	
Apply	If order matches any criterion
Add Order Criteria	Select Items
Item	T-shirt
Minimum Purchase	1 Unit

What the customer will get

The following table shows how to set up the Get conditions for this type of promotion with the Advanced Promotions SuiteApp.

Field	Value
Click the **Discount** subtab	
Add Item Criteria	Select Items
Item	Dress
Exclude Items	-

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirt, 1 dress	$30	$5	$25

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirt, 2 dresses	$50	$5	$45
1 T-shirt, 3 dresses	$70	$5	$65
2 T-shirts, 3 dresses	$80	$5	$75

Creating Item-Based Shipping Advanced Promotions

You can create item-based promotions that provide shipping discounts on certain shipping methods. In this way, your customers can use a coupon code that applies discounted shipping costs to an item on the order. You can also create a coupon code that ships a particular item on an order for free, different from the rest of the items in the order.

> **Note:** You can have only one shipping discount per promotion. You can select either a shipping discount or item-specific free shipping. You cannot stack multiple shipping discounts on one promotion.

To create an item-based shipping promotion:

1. Go to Campaigns > Marketing > Promotions > New.
2. Select **Item-Based Promotions** from the Standard Promotions and Advanced Promotions category.
3. Enter the primary information for this promotion, see Advanced Promotions Primary Information.
4. On the **Codes** subtab, set up the coupon codes for the promotion. For more information, see Associating Coupon Codes With an Advanced Promotion.
5. On the **Eligibility** subtab, set up the eligibility criteria for the promotion. For more information, see Setting Up Promotion Eligibility for Advanced Promotions.
6. Click the **Discount** subtab.
7. In the **Add Shipping Discount** field, select one of the following:
   - New Shipping Discount
   - New Item Specific Free Shipping
   - Select Item Saved Search for Free Shipping
8. If you use a saved search, you can preview a list of items associated with the shipping method you selected.
9. Click **Save.**

New Shipping Discount

Choose this option to apply a shipping discount to the shipping methods you choose. You can enter the discounted shipping amount or enter a discount percentage.

To add a new shipping discount:

1. Choose **Percent Off** or **Set Amount**.

   If you enter a percentage, the shipping amount is discounted by this percentage. If you enter a currency amount, this is used as the shipping amount.
2. Select one or more **Shipping Methods**.

3. Click **Save**.

> **Note:** This discount applies to the order only if the shipping method selected on the promotion matches the shipping method on the transaction.

New Item Specific Free Shipping

Choose this option to assign free shipping to certain items on the order. Your customers can purchase items using a coupon code that ships an item for free, different from the rest of the items in the order. For example, you can configure a promotion code so that a customer can purchase Items X, Y, and Z, where item Z is shipped for free.

The Exclude Item From Rate Request column on the Items subtab lets you exclude line items from the shipping cost calculation when the box is checked. After an item-specific free shipping promotion is applied to a transaction, the box is checked for the line item that is to receive free shipping. This column is shown on the Items subtab by default on the standard sales order form. When using a customized sales order form, make sure this column is added.

To add item specific free shipping:

1. Select an item in the **Item** list.
2. Select one or more Shipping Methods to offer for free with this item.
3. Click **Save** to add the item and associated free shipping method to the list on the **Discount** subtab.

Customers can use the coupon code associated with this promotion to order the item free of shipping charge.

Select Item Saved Search for Free Shipping

This option applies a free shipping method to a set of items returned in saved search results.

To create a free shipping promotion for items in a saved search:

1. Select an **Item Saved Search** from the list. Only saved searches that you already created and marked public appear in the list.
2. Select one or more **Shipping Methods**.
3. Click **Save**.

For shipping promotions based on saved search results, click the link in the preview column to see the list of items selected for the free shipping promotion.

Creating Buy X, Get Y Advanced Promotions

Buy X, Get Y promotions enable you to offer discounts on the order total. Eligibility for order-based promotions can be based on the items in an order or on the order total.

This type of promotion includes the following:

- “Buy 1, get 1 free” offers (for example, buy a laptop, get a free wireless mouse).
- A currency or percentage off item if a set number of items are also purchased (for example, buy a camera, and get 50% off any camera bag).

Note: You can only have one discount and one shipping discount per promotion.

To create a Buy X, Get Y promotion:

1. Go to Campaigns > Marketing > Promotions > New.
2. Select **Buy X, Get Y Promotions** from the Standard Promotions and Advanced Promotions category.
3. Enter the primary information for this promotion, see Advanced Promotions Primary Information.
4. On the **Codes** subtab, set up the coupon codes for the promotion. For more information, see Associating Coupon Codes With an Advanced Promotion.
5. On the **Eligibility** subtab, set up the eligibility criteria for the promotion. For more information, see Setting Up Promotion Eligibility for Advanced Promotions.
6. Click the **Discount** subtab.
7. In the **Get Y Discount** field, select one of the following:
   - **Select Items** – Select the items you want to offer a discount on. Click **Add Another** to select additional items.
   - **Select Saved Search** – Choose an existing item saved search that includes the items you are offering a discount on.
   - **Create New Item Saved Search** – Create an item saved search that includes the items you are offering a discount on.

   Note: You can choose only public searches to define discounts.
8. In the popup, check the **Apply Discount to Highest Valued Item** box to apply the discount to the most expensive item in the order. Clear this box to apply the discount to the least expensive item on the order.

   Important: This option affects only those promotions with defined unit limits.
9. Check the **Exclude Items** box to apply the promotion and discount to all items on the order, except those you select here. This option is useful when you have a large number of products on sale, and you want to exclude only a few items from the promotional discount.
10. In the **Promotional Offer** field, enter the percentage or amount off you are offering with this promotion. Click **Add Another** if you want to enter a maximum discount amount in additional currencies.
11. In the **Limit** field, enter the number of items you are offering a discount on. This is required if you want to apply the discount to the highest value item on the order.
12. Click **Save**.

To add a shipping discount, choose from the options provided in the Add Shipping Discount field. For more information, see Creating Item-Based Shipping Advanced Promotions.

Buy X, Get Y Advanced Promotion Example

Buy One, Get One Free – Advanced Promotions

- **Description** – Customers are eligible for a 100% discount on a specific item when they buy one of that item.

- **Tagline** – Buy 1 T-shirt and get 1 T-shirt for free! Or, Buy 2 for the price of 1!

What the customer needs to buy

The following table shows how to set up the Buy conditions for this type of promotion with the Advanced Promotions SuiteApp.

Field	Value
On the **Eligibility** tab click the **Buy X** subtab	
Apply	If order matches any criterion
Add Buy X Criteria	Select Items
Item	T-shirt
Minimum Purchase	1 Unit

What the customer will get

The following table shows how to set up the Get conditions for this type of promotion with the Advanced Promotions SuiteApp.

Field	Value
Click the **Discount** subtab	
Get Y Discount	Select Items
Item	T-shirt
Exclude Items	-
Promotional Offer	100%
Limit	-

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirt	$10	-	$10
2 T-shirts	$20	$10	$10
3 T-shirts	$30	$10	$20
6 T-shirts	$60	$30	$30

Creating Order-Based Advanced Promotions

Order promotions enable you to offer discounts on the order total. Eligibility for order-based promotions can be based on the items in an order or on the order total.

Order-based promotions include the following:

- A percentage or amount off the entire order (for example, a 20% off coupon).
- A percentage or amount off an order if certain order criteria are met (for example, 25% off orders of $500, or 10% off an order when you purchase a new laptop).

- An order discount for a segment of customers (for example, customers who registered in the last month receive 25% off).
- An order discount for a segment of customers if certain order criteria are met (for example, all customers in California receive $50 off of orders of $500).
- Free shipping on orders that meet certain requirements (free shipping on orders of $100).

> **Note:** Eligibility for Order-Based Advanced Promotions is evaluated before discounts are applied. Therefore, if you have an order that is eligible for free shipping when a minimum order amount is met, and you apply a promotion that reduces the price of the order below the minimum free shipping requirement, then the order remains eligible for free shipping.

To create an order-based promotion:

1. Go to Campaigns > Marketing > Promotions > New.
2. Select **Order-Based Promotions** from the Standard Promotions and Advanced Promotions category.
3. Enter the primary information for this promotion, see Advanced Promotions Primary Information.
4. On the **Codes** subtab, set up the coupon codes for the promotion. For more information, see Associating Coupon Codes With an Advanced Promotion.
5. On the **Eligibility** subtab, set up the eligibility criteria for the promotion. For more information, see Setting Up Promotion Eligibility for Advanced Promotions.
6. Click the **Discount** subtab.
7. In the **Add Order Discount** field, select **New Order Discount**:
8. In the popup, in the **Promotional Offer** field, enter the percentage or amount off you are offering with this promotion.
9. In the **Discount Up To** field, enter the maximum discount amount for this promotion. For example, you might limit the discount to $200. This option is only available when you set up a percentage discount.
10. Click **Add Another** if you want to enter a maximum discount amount for additional currencies.

    You can designate maximum discounts for each currency you do business in.
11. Click **Save**.

To add a shipping discount, choose from the options provided in the Add Shipping Discount field. For more information, see Creating Item-Based Shipping Advanced Promotions.

Order-Based Advanced Promotion Example

Percentage Off an Order – Advanced Promotions

- **Description** – Customers are eligible for a percentage off any order when they buy a specific item.
- **Tagline** – Buy a T-shirt and get 10% off your order!

What the customer needs to buy

The following table shows how to set up the Buy conditions for this type of promotion with the Advanced Promotions SuiteApp.

Field	Value
On the **Eligibility** tab click the **Order** subtab	

Field	Value
Apply	If order matches any criterion
Add Order Criteria	Select Items
Item	T-shirt
Minimum Purchase	1 Unit

What the customer will get

The following table shows how to set up the Get conditions for this type of promotion with the Advanced Promotions SuiteApp.

Field	Value
Click the **Discount** subtab	
Add Order Discount	New Order Discount
Promotional Offer	10%
Discount Up To	-

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
1 Dress	$20	-	$20
1 T-shirt, 1 dress	$30	$3	$27
2 T-shirts, 2 dresses	$60	$6	$54
3 T-shirts, 2 dresses	$70	$7	$63

Creating Tiered Promotions

To create a tiered promotion, you need to:

1. Create tiers to define the promotion criteria. See Creating Tiers.
2. Add discounts to the tiers. See Adding Discounts to Tiers.

If you use the Multiple Currencies feature, and you want to base your tiers on multiple currencies, you must make sure that each tier includes a price in each of those currencies. If your promotion discount is in the form of a currency amount, you must include an amount for each of the currencies you used to define your tiers.

Creating Tiers

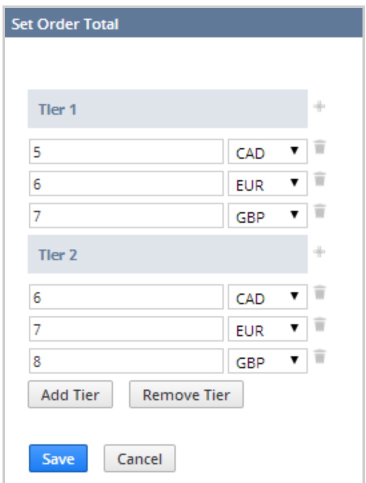
To create a tier:

1. Check the **Create Tiers** box on the promotion record.
2. Click the **Eligibility** subtab and add order criteria to define your tiers. Tiers can be defined by the number of units sold or by currency amounts.

> **Important:** Adding a large number of eligible items to a tiered promotion can result in an error. Use a saved search instead of adding items manually. For more information regarding saved searches, see the help topic Saved Searches.

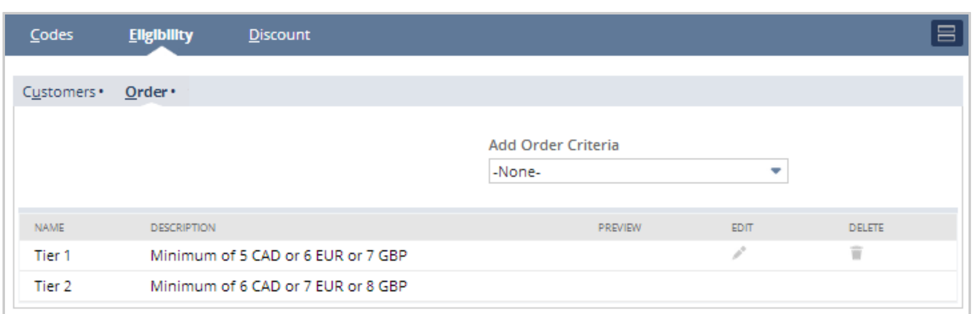
3. To define multiple currency amounts for your first tier:
   a. Enter the first currency amount and select the currency.
   b. Click **Add Another** to add an amount in a different currency for this tier.
   c. Repeat these steps for each currency you use to define this tier.
4. After you have added all of the currency amounts for the first tier or item quantities, click the add icon next to the tier to create an additional tier. A promotion can have up to 10 tiers.

> **Note:** Promotion tiers must be created in increasing order. If you define your first tier using currency amounts, every other tier must include amounts in each of the currencies you used for the first tier.



5. When you have added the tiers, click **Save** in the popup.

   Your tiers display on the **Order** subtab.



Adding Discounts to Tiers

To add a discount to a tier:

1. Click the **Discount** subtab.

2. In the **Add Item Discount** field, choose how to define your discount. The tiers you created on the **Eligibility** subtab are shown.

> **Important:** Adding a large number of eligible items to a tiered promotion can result in an error. Use a saved search instead of adding items manually. For more information regarding saved searches, see the help topic Saved Searches.

3. If you are creating an Item-Based or Buy X, Get Y promotion, note the following:
   - Check the **Apply Discount to Highest Valued Item** box to apply the discount to the most expensive item in the order. Clear this box to apply the discount to the least expensive item on the order. This setting affects only those promotions with defined unit limits.
   - Check the **Exclude Items** box to apply the promotion and discount to all items on the order, except those you select here. This option is useful when you have a large number of products on sale, and you want to exclude only a few items from the promotional discount.
   - Choose **Limit** in the Select Items popup window. Set the maximum number (units) of items you are offering the discount on.
4. Choose whether you are entering the promotion discounts as currency amounts or percentage discounts.
5. Enter the discount you are offering for each tier.

   If you are entering currency amount discounts, you must enter a currency amount for each tier you defined on the **Eligibility** subtab. If you do not enter a discount amount for a certain currency, no discount is applied on an order in that currency, even if the order qualifies for that tier.
6. When you have entered discounts for each tier, click **Save.**

   The discount for each tier is listed on the **Discount** subtab.
7. Click **Save**.

> **Note:** You cannot create tiered promotions for Buy X, Get Y promotions.

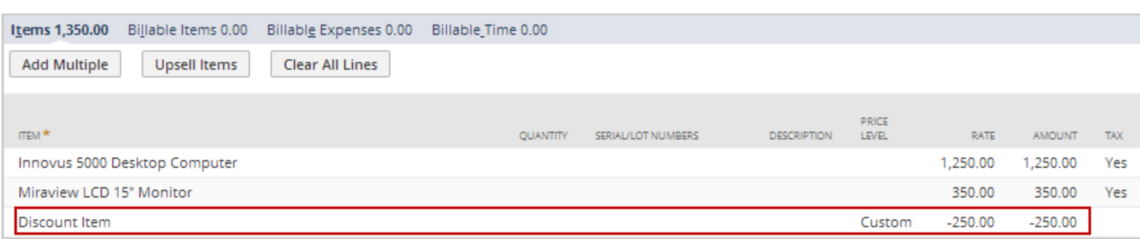
To make a change to a promotion's tiers, click Edit next to the list of tiers on the Eligibility or Discount subtab. If you change the tiers on the Eligibility subtab, you must re-enter the discounts for each tier.

Creating Fixed Price Advanced Promotions

As an alternative to offering a currency or percentage discount through a promotion, you can offer items at a fixed promotional price.

For example, Wolfe Electronics has a promotion that offers any Miraview computer monitor for $100 if they buy any desktop computer. Rather than entering a discount as a percentage or currency amount, Wolfe enters a price for the monitor. If the promotion is applied to an order that meets these criteria, the monitor price is set to $100.

Fixed price promotions create price adjustment lines after each item line on a transaction that includes items that were configured on the Discount subtab of the promotion.

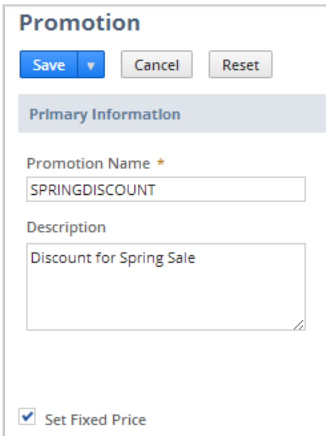


These price adjustments are reflected in the transaction subtotal rather than as discounts.

> **Note:** Fixed pricing is only available for item-based promotions and cannot include discount tiers.

To create a fixed price promotion:

1. Create an item-based promotion.
2. Check the **Set Fixed Price** box.



3. Enter other primary information and a coupon code for this promotion.
4. Set up the eligibility rules:
   a. Click the **Eligibility** subtab and
   b. Click the **Order** subtab, and enter order criteria for the promotion.

      Order criteria for fixed price promotions can be based on the order total or on the number of items sold. In the example above, the order criteria include one unit of any desktop computer item. For more information, see Setting Up Promotion Eligibility for Advanced Promotions.
5. Set up the discount:
   a. Click the **Discount** subtab.
   b. In the **Add Item Discount** field, choose one of the options for selecting items, and define the item discount.
   c. In the popup, check the **Apply Discount to Highest Valued Item** box to apply the discount to the most expensive item in the order. Clear this box to apply the discount to the least expensive item on the order.

      > **Important:** This setting only affects promotions with defined unit limits

   d. In the **Item** field, select the items you are setting the fixed price for.
   e. Check the **Exclude Items** box to apply the promotion and discount to all items on the order, except those you select here. This option is useful when you have a large number of products on sale, and you want to exclude only a few items from the promotional discount.
   f. In the **Promotional Offer** field, enter the percentage or amount off for those items. Click **Add Another** if you want to enter a maximum discount amount in additional currencies.
   g. To set limits on the promotion, choose one of the following:

- **Limit** – Enter the maximum number (units) of items you are offering the discount on. This is required if you want to apply the discount to the highest value item on the order.
- **Up to a Total Discount of** – Enter the maximum currency amount discount this promotion gives. If you use the **Multiple Currencies** feature, you can enter the maximum discount in any currency you do business in.

h. Click **Save**.

6. Click **Save** on the promotion record.

When you apply a fixed price promotion to a transaction, a discount line with the price adjustment is added after each item configured on the Discount subtab of the promotion.

Fixed Price Advanced Promotions Example

Fixed Price on Eligible Items – Advanced Promotions

- **Description** – Customers are eligible for a specific item or items when they buy a minimum quantity.
- **Tagline** – Save $15 when you buy 5 or more T-shirts!

What the customer needs to buy

The following table shows how to set up the Buy conditions for this type of promotion with the Advanced Promotions SuiteApp.

Field	Value
Check the **Set Fixed Price** box	
On the **Eligibility** subtab click the **Order** subtab	
Apply	If order matches any criterion
Add Order Criteria	Select Items
Select Items	T-shirt
Minimum Purchase	5 Units

What the customer will get

The following table shows how to set up the Get conditions for this type of promotion with the Advanced Promotions SuiteApp.

Field	Value
Click the **Discount** subtab	
Add Item Discount	Select Items
Item	T-shirt
Exclude Items	-
Promotional Offer	7 USD
Limit	-

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
4 T-shirts	$40	- (T-shirts are still $10 each)	$20
5 T-shirts	$50	$15 (T-shirts are now only $7 each = saving of $3 per T-shirt)	$27
6 T-shirts	$60	$18 (T-shirts are now only $7 each = saving of $3 per T-shirt)	$54
10 T-shirts	$100	$30 (T-shirts are now only $7 each = saving of $3 per T-shirt)	$70

Applying Promotions and Discounts to a Transaction

Promotions can be applied to a transaction in a variety of ways:

- You can apply promotion codes to a web store order, and at the point of sale. For more information, see Promotions and Websites.
- Promotions can be stacked, so you can have more than one eligible promotion per transaction. For more information, see Applying Stackable Promotions.
- Promotions can be manually or automatically applied. For more information, see Automatically Applying Promotions.

Discounts are applied to a transaction automatically when a promotion is applied. The value of the discount is dependent on how tax is calculated in your region, see How Promotion Discounts Are Applied to Transactions.

Free gift SuitePromotions automatically add the free item to a transaction. Promotions that offer an item or items for free – but are not created using the free gift SuitePromotion type – do not automatically add the item to a transaction. For more information, see Applying Automatically Added Free Gift Items.

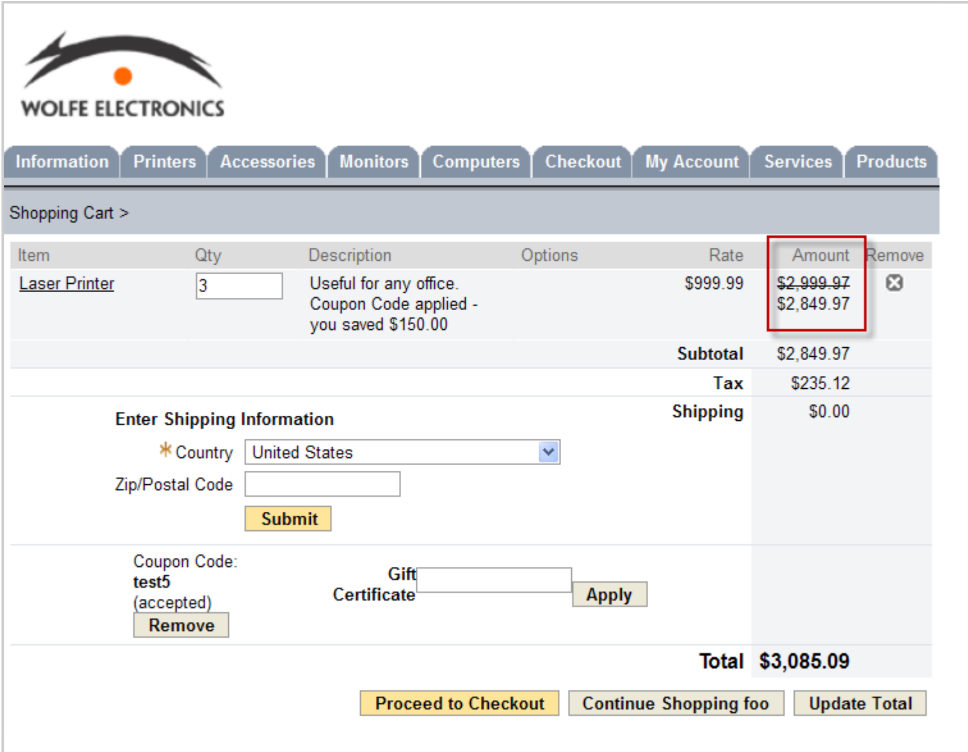
Promotions and Websites

When a promotion has a discount, the code can be used as a coupon code in your NetSuite web store. Web store shoppers can enter a coupon code on the shipping method page or on the last page of checkout.

Note: Coupon codes entered on web store orders are not case sensitive.

For more information regarding coupon codes, see Coupon Codes.

Line discounts are shown as strikethrough prices in the shopping cart on web store orders.



Only a percentage discount will register as line-level, and create strikeout pricing on the Web Store. A flat rate promotion code applies to the total order. To remove the Coupon Code fields from your shopping cart, you must inactivate or apply end dates to all of your promotions and turn off the Promotion Codes feature.

Applying Stackable Promotions

In this section, you will learn how to utilize the SuitePromotions feature to apply multiple promotions to one transaction.

> **Note:** Before you can apply promotions to a transaction, you must first enter a customer, and select at least one item on the transaction.

To apply multiple promotions on a transaction:

1. Click the **Promotions** subtab.
2. In the **Promotion** column, select a promotion from the list. This list is filtered to only show the promotions that can be applied to the transaction.
3. Click **Add**.
4. Repeat steps 2 through 3 for each promotion you want to add.
5. Click **Save**.

Combination With Other Promotions

All promotions can be combined on one transaction by default if this transaction is eligible. However, you can prevent any promotion from being combined with other promotions. This functionality is

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useful, for example, when you have promotions that offer large order-level discounts that you do not want to combine with other promotions.

To prevent a promotion from being combined with other promotions, go to Lists > Marketing > Promotions, edit the promotion and check the **Exclusive Promotion** box.

To prevent Item Promotions from being combined with other eligible promotions for the same item on a transaction, check the **Item Line Exclusive Promotion** box.

To prevent Order Promotions from being combined with other eligible order type promotions on a transaction, check the **Order Type Exclusive Promotion** box.

To prevent Shipping Promotions from being combined with other eligible shipping type promotions on a transaction, check the **Shipping Type Exclusive Promotion** box.

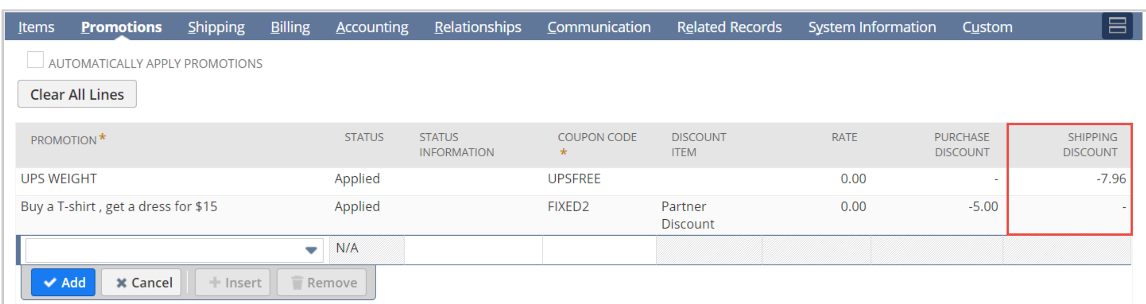
For more information on how exclusive promotions are automatically applied, see How Best Offer is Applied.

Shipping Discounts and Stackable Promotions

Shipping discounts are applied to transactions in the form of promotions that offer free shipping on a particular shipping method. Currently, only promotions that offer 100% discount on a particular shipping method can be created and applied.

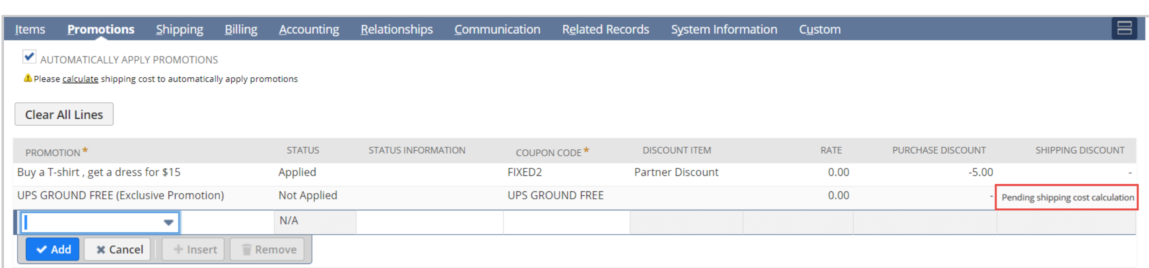
There is a new column on the Promotions subtab that provides specific information regarding the value of the shipping discount provided by applied promotions:

- **Shipping Discount:** shows the monetary value of the discount provided by the promotion on the shipping costs



When you add a shipping promotion to a transaction, the shipping discount is calculated automatically unless:

- The shipping method selected on the Shipping subtab does not match the shipping method eligible for a discount in the promotion.
- The shipping discount is unknown because the shipping method must be calculated in real time. In such instances, the Shipping Discount column shows that the value is "Pending shipping cost calculation" and you must calculate the shipping cost to show the value of the shipping discount.



To calculate the shipping discount when the shipping method must be calculated in real time:

1. Click the **Shipping** subtab.
2. Click the **Calculator** icon to calculate the shipping costs. The value of the shipping discount is added to the Shipping Discount column for the matching promotion on the Promotions subtab, and the shipping cost is adjusted in the transaction summary.

If there is a conflict involving exclusive promotions and shipping promotions when automatically applying promotions to a transaction, you must manually calculate shipping costs. For information, see Calculating Shipping Costs Before Automatically Applying Promotions.

After adding a shipping promotion to a transaction, NetSuite does not automatically update the shipping method on the Shipping tab. To ensure the customer benefits from the discount provided by the shipping promotion, you must manually add the shipping method eligible for the promotion on the Shipping tab.

To manually add the shipping discount associated with a shipping promotion:

1. Click the **Shipping** subtab.
2. In the **Shipping Carrier** field, select a shipping carrier that is eligible for free shipping in a shipping promotion.
3. In the **Shipping Method** field, select a shipping method that is eligible for free shipping in a shipping promotion. The value of the shipping discount is added to the Shipping Discount column for the matching promotion on the Promotions subtab and the shipping cost is adjusted in the transaction summary.

Automatically Applying Promotions

After you have set up your automatically applied promotions, they can be added to a transaction automatically using the Auto-Apply Promotions feature.

Making a Promotion Available for Automatic Applying

To make a promotion available for automatic applying to a transaction, on the promotion form check the **This promotion can be automatically applied** box.

If you want customers to provide a coupon code at the point of sale to be eligible for the promotion, do not check the **This promotion can be automatically applied** box on the promotion form.

Automatically Applying Promotions to a Transaction

Promotions are considered for automatic application on a transaction only if they meet the following criteria:

- The **Inactive** box is cleared on the promotion.
- The **This promotion can be automatically applied** box is checked on the promotion.

However, not all promotions that the transaction is eligible for are applied. For more information, see How Best Offer is Applied.

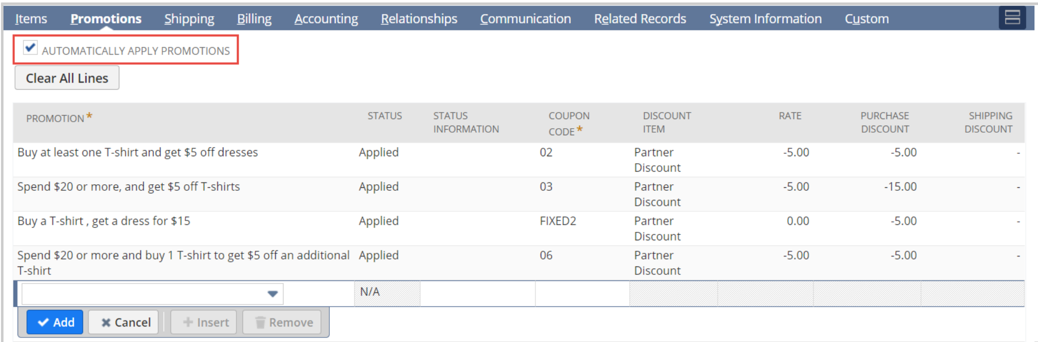
To automatically apply promotions to a transaction:

1. Go to Transactions > Sales > Enter Sales Order.
2. Create a sales order.
3. Select a customer.
4. On the **Items** subtab, add the items to be purchased in this transaction.

5. On the **Promotions** subtab, the **Automatically Apply Promotions** box is checked by default to indicate that eligible promotions have been automatically added to the transaction.

> **Important:** A customer and at least one item must be added to a transaction before promotions can be automatically applied.

> **Note:** You can also add SuitePromotions manually when the **Automatically Apply Promotions** box is checked. Select the promotion from the list and click the **Add** button to manually add the promotion discount. When a standard or Advanced Promotion is manually added to a transaction the **Automatically Apply Promotions** box is disabled. Standard and Advanced promotions cannot be added if another promotion has already been automatically applied and the **Automatically Apply Promotions** box is checked.



6. After you have finished adding promotions to the transaction, click **Save**.

How Best Offer is Applied

NetSuite provides flexible control over how promotions are added to transactions. You can utilize the Auto-Apply Promotions feature to ensure promotions are quickly added to a transaction at the point of sale. You can, however, also manually add promotions as needed.

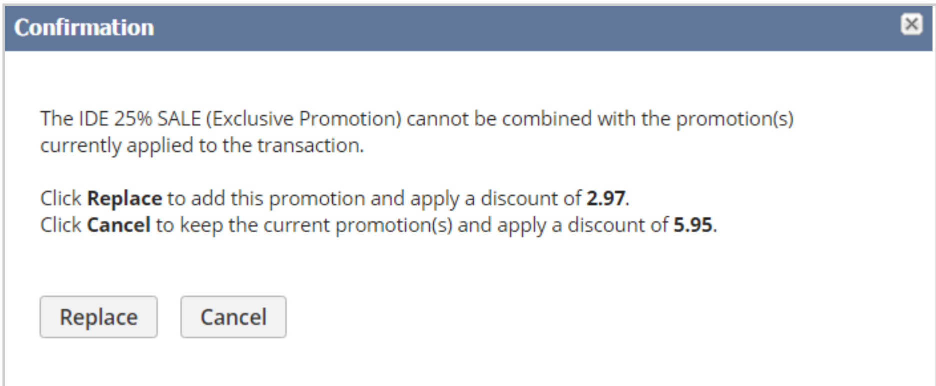
For example, when you have promotions that require a customer to provide a coupon code at the point of sale to be eligible for that promotion's discount. Manually adding promotions ensures that you have complete control over the discount provided to your customers, so they are guaranteed to be able to receive the best offer available.

Free gift promotions are not considered by the Best Offer logic. A free gift promotion cannot be exclusive, nor excluded by other exclusive promotions and is therefore always considered for eligibility.

Whenever promotions are added automatically or manually, it is important to consider if the promotions can be combined. NetSuite manages exclusive promotions in the following way:

- When the Automatically Apply Promotions box is checked:
  - An exclusive promotion is not applied unless there are no other promotions offering a greater discount for the customer, either alone or when combined with other promotions.
  - After you manually add an exclusive promotion, if it does not offer the greatest discount to the customer it will be automatically removed from the applied promotions list.
  - After you manually add an exclusive promotion, if it offers the greatest discount, it will be applied and all other promotions will be removed.
- When the Automatically Apply Promotions box is cleared:
  - After you manually add an exclusive promotion, when no other promotion is applied, the exclusive promotion is applied without conflict.

- After you manually add an exclusive promotion, when there are one or more promotions already applied, NetSuite shows the total discount to be applied in each scenario. You must manually consider which combination provides the best discount available for the customer and click **Replace** to apply the exclusive promotion, or click **Cancel** to discard it.



> **Note:** When Item Line Exclusive promotions are applied and there are one or more promotions that can also be applied, NetSuite warns you that you cannot combine the promotions. It does not, however, display the total discount that can be applied in each scenario.

When you check the Automatically Apply Promotions box again, NetSuite automatically applies the combination of promotions that provide the greatest discount possible to the customer. This combination can also include promotions that are not available to be automatically applied but have been added manually. Manually added promotions remain applied until you click Clear All Lines to reset the list of applied promotions to the default selection.

The following scenarios illustrate how promotions are applied. In this example, the promotions are applied to a transaction with an order total of $300 before promotions are applied. The value of the order does not change. The value of each promotion is the amount of US dollars that will be discounted from the order total.

When the Auto-Apply Box is Checked

Scenario 1: Default behavior, promotions are automatically applied.

Result: The exclusive promotion (Promotion 2) is excluded.

Total Discount: 150.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	Yes
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	No	100	Yes
Promotion 4	No	No	40	No
Promotion 5	No	No	200	No

Scenario 2: Promotion 3 is now exclusive. Default behavior, promotions are automatically applied, but now the promotion with the best discount is exclusive.

Result: The exclusive promotion with the highest discount to the customer (Promotion 3) is applied.

Total Discount: 100.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	**No**
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	**Yes**	100	Yes
Promotion 4	No	No	40	No
Promotion 5	No	No	200	No

Scenario 3: Promotion 4 is manually applied.

Result: Promotion 4 does not create the greatest discount when combined with other promotions so it is automatically removed. The promotion that offers the best discount is applied (promotion 3).

Total Discount: 100.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	No
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	Yes	100	Yes
Promotion 4	No	No	40	No
Promotion 5	No	No	200	No

Scenario 4: Promotion 5 is manually applied.

Result: Promotion 5 offers the greatest discount when combined with other promotions so it is applied with the other promotion that can be combined and automatically applied (Promotion 1), the exclusive promotion (Promotion 3) is removed.

Total Discount: 250.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	**Yes**
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	Yes	100	**No**
Promotion 4	No	No	40	No
Promotion 5	No	No	200	**Yes**

Scenario 5: Promotion 5 is manually applied, but is now exclusive.

Result: Promotion 5 offers the greatest discount compared with other possible combinations so it is applied. All other promotions are removed.

Total Discount: 200.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	**No**
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	Yes	100	No
Promotion 4	No	No	50	No
Promotion 5	No	**Yes**	200	Yes

When the Auto-Apply Box is Cleared

Scenario 1: Default behavior, promotions that are automatically applied before the box is cleared remain.

Result: The exclusive promotion (Promotion 2) is excluded.

Total Discount: 150.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	Yes
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	No	100	Yes
Promotion 4	No	No	40	No
Promotion 5	No	Yes	200	No

Scenario 2: Promotion 2 is manually applied.

Result: NetSuite displays a message that shows the total discount to be added to the transaction depending on which promotion is applied. Click **Cancel** to keep the currently applied promotions that offer a greater discount than Promotion 2.

Total Discount: 150.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	Yes
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	No	100	Yes
Promotion 4	No	No	40	No
Promotion 5	No	Yes	200	No

Scenario 3: Promotion 5 is manually applied.

Result: NetSuite displays a message that shows the total discount to be added to the transaction depending on which promotion is applied. Click **Replace** to apply Promotion 5 that offers a greater discount than the currently applied promotions.

Total Discount: 200.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	**No**
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	No	100	**No**
Promotion 4	No	No	40	No
Promotion 5	No	Yes	200	**Yes**

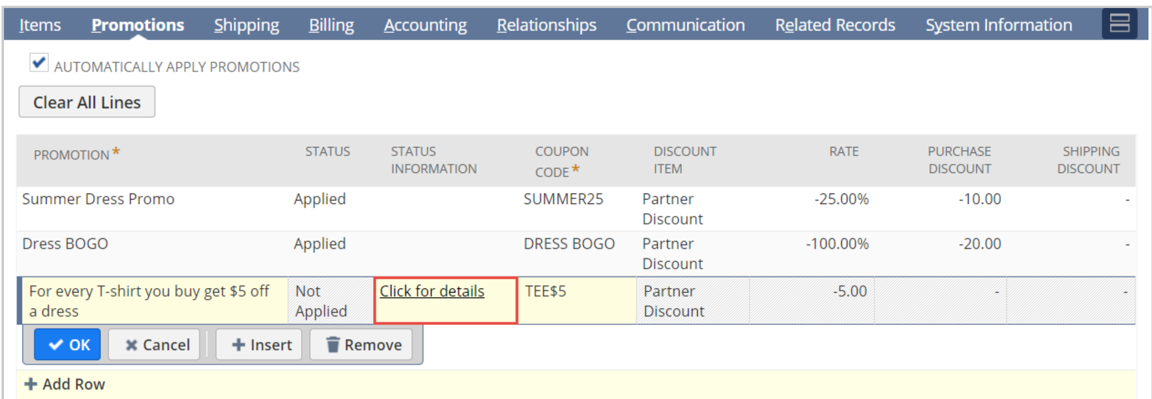
Viewing the Status of Applied Promotions

The Audit and Visibility SuitePromotions feature provides a clear overall view of the application of promotions on a transaction. Audit and Visibility shows if a promotion was added by the user or by best offer. If a promotion is not applied, it also displays the reasons why it was not applied. Such information is invaluable if you need to track customer issues, especially considering the increasing complexity of how promotions are applied to transactions.

Status information regarding promotions that are applied to a transaction, as well as those that are not applied, is displayed on the Promotions subtab on sales orders, cash sale transactions, invoices and return authorizations.

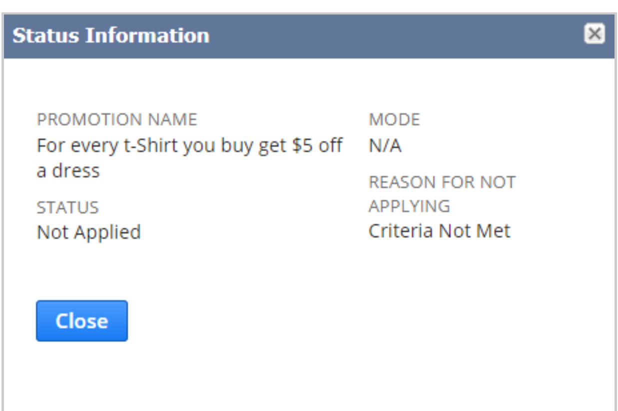
Promotions that are not applied to a transaction only appear on the Promotions subtab if they are manually added or were previously automatically applied before a change to the eligibility criteria. For example, an item being removed from a transaction that had previously qualified the transaction for a promotion's discount.

To illustrate, an item promotion that offers $5 discount on dresses when at least one T-shirt is bought, may be manually or automatically applied if a T-shirt and a dress are added to the transaction. This promotion will still show on the Promotions subtab if the T-shirt or dress are removed from the transaction, however it will not be applied. In the Status Information window, the reason for not applying this promotion will be listed as Criteria Not Met.



To view the status of a promotion on a transaction:

1. Click the **Promotions** subtab and click in the **Status Information** column for the promotion whose status you want to view.
2. Click the **Click for details** link that appears in the **Status Information** column.
3. The Status Information window opens.



The following promotion information is displayed in the Status Information window:

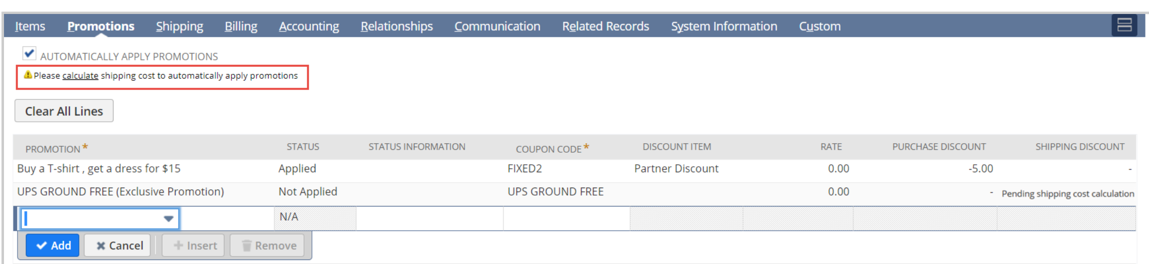
Field	Description
Promotion Name	The name of the promotion whose status is displayed
Status	Describes the current application status of the promotion regarding this transaction: ■ Applied ■ Not Applied
Mode	When a promotion is applied to this transaction, this field will show if it was initially applied automatically or manually. Note this feature is currently not available.
Reason For Not Applying	If the promotion is not applied to this transaction, this field describes the reason why it has not been applied. Possible reasons are: ■ **Discarded by Best Offer** – either this promotion is exclusive and the Best Offer logic has determined that one or more promotions offer more discount to the customer, or another exclusive promotion offers more discount to the customer. For more information, see How Best Offer is Applied. ■ **Discarded by the User** – the user discarded the promotion from the transaction when prompted to choose between conflicting promotions (when there is at least one exclusive promotion). For more information, see How Best Offer is Applied. ■ **Criteria Not Met** – the transaction does not meet the eligibility criteria of this promotion. For example, the transaction is out of the scheduled time frame for the promotion, or eligibility items have been removed from the transaction.

Calculating Shipping Costs Before Automatically Applying Promotions

When a transaction is eligible for a shipping promotion, at least one combinable promotion, and one exclusive promotion, the shipping costs will impact which promotions offer the largest discount. Therefore, only in such circumstances and when the shipping costs are unknown, you must first calculate shipping costs before you can automatically apply promotions.

When this happens a warning message appears on the Promotions subtab.

Click the **calculate** link to calculate shipping costs for the transaction before the promotions can be automatically applied. This is the only way to ensure the best offer will be calculated on the transaction.



After the shipping costs have been calculated the warning message disappears and the promotion combination that offers the greatest discount to the customer is applied to the transaction.

How Promotion Discounts Are Applied to Transactions

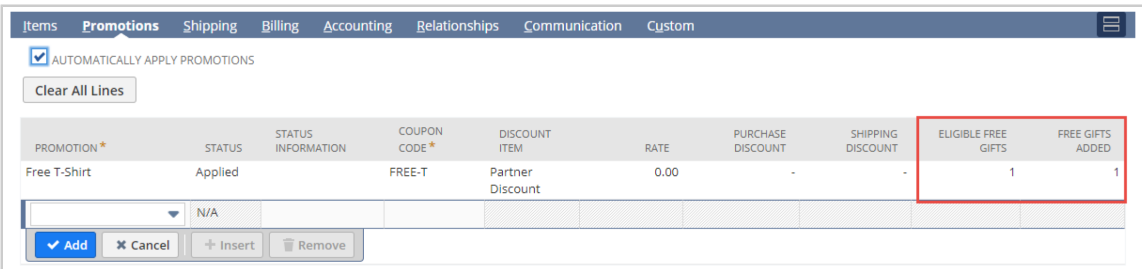
By default, promotion discounts are applied to the transaction total after sales tax has been calculated. However, in the U.S. you have the option to apply the discount to all items in a transaction before sales tax is calculated. For more information, see the help topic Applying a Discount Before Sales Tax

Applying Automatically Added Free Gift Items

The item provided by a free gift promotion is automatically added to a transaction if the transaction matches the promotion's eligibility criteria.

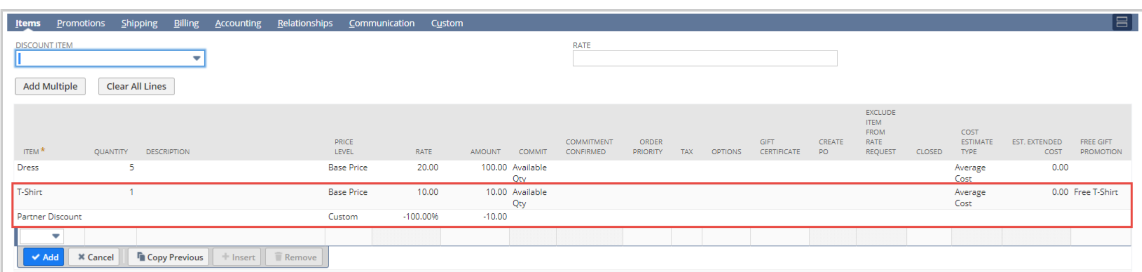
When you apply a free gift promotion on the Promotions subtab, the following columns provide information regarding the free gift promotion:

- **Eligible Free Gifts** – displays the number of free gifts eligible to be applied to this transaction with this promotion
- **Free Gifts Added** – displays the number of free gifts currently added to this transaction with this promotion



After the free gift promotion is applied to a transaction, either manually or automatically, the free item is added to the customer's order when the eligibility criteria is met. For example, if the customer must spend $100 to receive the free gift, the free gift item will automatically be added after items to the value of $100 or more are added to the transaction. The free gift appears on the Items subtab with the 100% discount showing on the line below in the Items list.

The Free Gift Promotion column in the Items list identifies the free gift promotion that is responsible for adding the free item to the order.



A free gift cannot be added to an order automatically if mandatory information regarding the free gift is missing. For example, a free gift promotion offers a warranty that requires a value to be entered in the Amount column in the Items list. In such cases a popup window displays the information that is required before the free gift can be added to the order. The free gift appears on the Items subtab but is not added to the order until the missing information is entered. On the Promotions subtab, the Eligible Free Gifts column will indicate that there are free gifts eligible to be applied to the transaction, but the Free Gifts Added column will display zero.

> **Note:** If the free gift item is already added to the order, this item does not become the free gift. An additional instance of the item is added.

To reject the free gift item, select it in the Items list and click the **Remove** button. The free gift item is discarded from the transaction.

SuitePromotions Best Practices

To take full advantage of SuitePromotions, you should follow the best practices outlined here:

- Migrating to SuitePromotions
- Transactions that Cannot have Stackable Promotions
- Free Gift Promotion Item Considerations
- Shipping Promotions and Multiple Shipping Routes
- Saved Search Performance
- Auto-Apply Promotions Limits
- Changing Customer Details After Applying Promotions
- Planning Automatically Applied Promotions

Migrating to SuitePromotions

SuitePromotions can be enabled at any time to enable you to take advantage of the new features they offer. For more information, see Configuring Promotions.

View the SuitePromotions Migration video — part one

View the SuitePromotions Migration video — part two

You can continue to use standard and Advanced promotions after SuitePromotions have been enabled, but you cannot benefit from the new SuitePromotions features such as Stackable Promotions, Auto-Apply Promotions, or Best Offer when you apply them to a transaction. You will be able to apply only one standard or Advanced promotion to a transaction, for example.

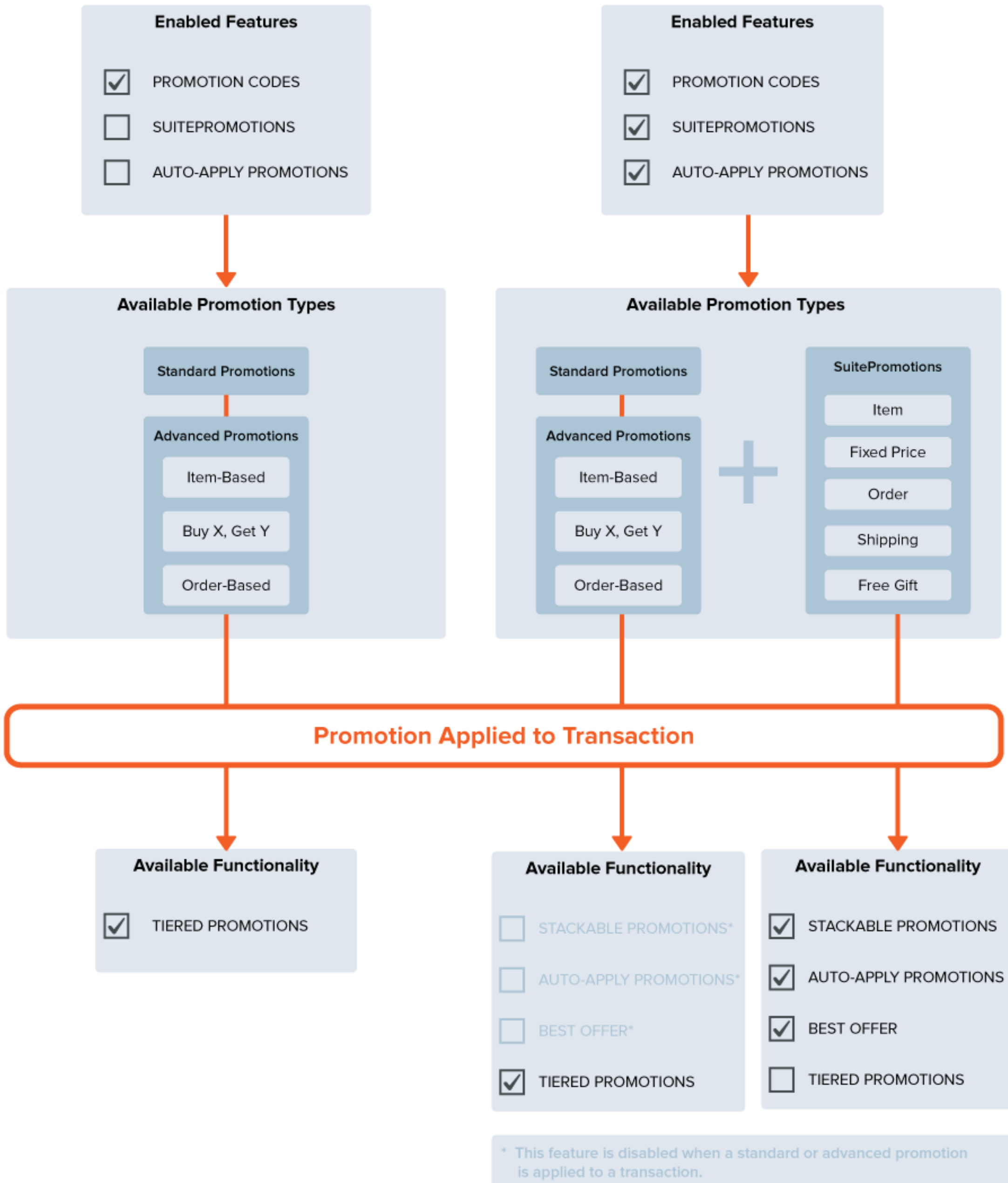
By default, the first promotion you apply to a transaction determines if the SuitePromotions feature can be used. If you apply a standard or Advanced promotion to a transaction, SuitePromotion features are disabled for that transaction only.

If you need to create tiered promotions, you can create an Advanced Promotion with tiers and apply this promotion to a transaction, even when SuitePromotions are enabled. Tiered promotions will be made available to SuitePromotions in a future release.

If you use the Auto-Apply feature, by default it will be enabled. To manually add standard, Advanced, or SuitePromotions that cannot be automatically applied, you must first clear the **Automatically Apply Promotions** box on the transaction. For more information, see Automatically Applying Promotions to a Transaction.

When you add a standard or Advanced promotion, the Best Offer feature is also disabled and you must manually determine if the promotion provides the best offer for the customer. For more information, see Best Offer.

You can continue to use standard and Advanced promotions until you no longer need them or have replaced them with SuitePromotions.



Transactions that Cannot have Stackable Promotions

Currently, transactions cannot have multiple stacked promotions in the following cases:

- The transaction was created when the SuitePromotions feature was disabled.
- The transaction is a sales order with billing schedules. For more information regarding billing schedules, see the help topic Billing Schedules.

Free Gift Promotion Item Considerations

Free gift promotions currently support all items with the exception of parent matrix items. For example, if you have a parent matrix item called Basic T-shirt that has child items for different sizes, the Basic T-shirt cannot be selected as a free gift item. You can however, define one of the child items, such as Basic T-shirt: Medium as the free gift item for your promotion.

Free gift promotions are limited to only one free gift item per promotion.

You cannot replace the free gift item added to a transaction by a free gift promotion with a different item. You cannot change the quantity of the free gift item added to a transaction by a free gift promotion. You can reject the free gift by clicking the Remove button to discard it from the transaction.

Shipping Promotions and Multiple Shipping Routes

You can use multiple shipping routes only with SuitePromotions that have shipping impact.

Multiple shipping routes are supported when:

- The Multiple Shipping Routes feature is enabled
- The Enable Item Line Shipping box is checked on the Items subtab of the transaction
- The SuitePromotions feature is enabled

If the above criteria are met, when an eligible shipping SuitePromotion is added, the shipping discount is applied after you calculate the shipping costs.

Shipping SuitePromotions can only be automatically applied after shipping costs have been calculated.

> **Note:** If the SuitePromotions feature is disabled, NetSuite displays a message confirming that promotions with shipping impact are not allowed when the transaction has Multiple Shipping Routes activated. The promotion is removed from the transaction.

For more information regarding Multiple Shipping Routes, see the help topic Multiple Shipping Routes.

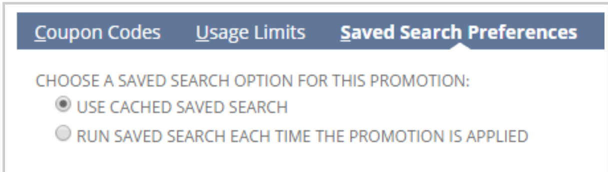
Saved Search Performance

When you use an item saved search to define item eligibility on SuitePromotions, the Saved Search Preferences subtab appears on the promotion record. Here you can configure the way that the promotion handles saved searches. The options provide you with a choice between better performance or more accurate results.

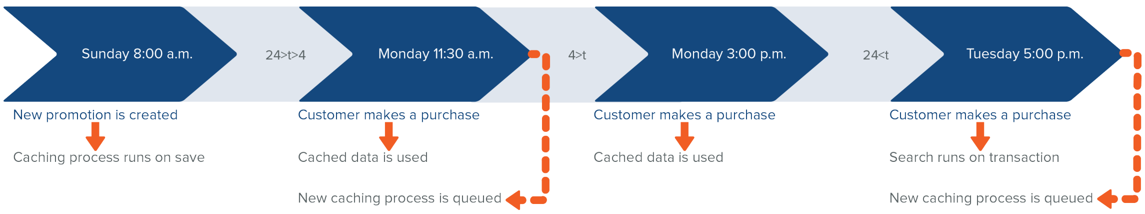
Saved searches are cached periodically to update the items included. This also ensures the data is retrieved quickly every time a promotion that uses saved searches is evaluated on a transaction. If however, you have a saved search that is linked to an inventory that frequently changes, it is possible that recent updates to this inventory are not taken into consideration when a promotion is evaluated. In such cases, it may be worth considering not relying on the cached version of the saved search.

You can select one of the following saved search options for each promotion:

- **Use cached saved search** – provides better performance as results are returned faster whenever the promotion is applied to a transaction. This is the default behavior.
- **Run saved search each time the promotion is applied** – uses the most up to date version of the saved search possible, but results are generated slower.



The frequency that saved searches are cached is illustrated in the following diagram.



When a new promotion is created, the caching process automatically runs after the promotion is saved. Then, for example, if a customer makes a purchase less than 24 hours but more than four hours after caching the saved search, the cached data is used and a new caching process is queued. If a customer makes a purchase more than 24 hours after the last cache, the cached data is not used, a new search on the transaction is initialized, and a new caching process is queued.

Auto-Apply Promotions Limits

The number of active promotions that can have the This promotion can be automatically applied box checked is limited to 30 for a specific date range per location. This limitation is enforced when you create or edit a promotion record. You cannot save a promotion if it exceeds this limit.

To save new promotions without exceeding the limit, you must do one of the following:

- Clear the **This promotion can be automatically applied** box for the new promotion.
- Check the **Inactive** box.
- Change the date range. Any promotions that do not specify a date range are considered as “any date” and are counted as one of the 30 available active promotions for all date ranges.
- Change the location. Any promotions that do not specify a location are considered as “any location” and are counted as one of the 30 available active promotions for all locations. For more information on setting locations, see Setting Where Promotions Can Be Used.
- Clear the **This promotion can be automatically applied** box on another promotion with the same date range or location, or on a promotion with an unspecified date or location.

For more information about promotions that do not specify date ranges or locations, see Promotions With Unspecified Schedules or Locations. See also, Planning Automatically Applied Promotions.

> **Note:** You can create an unlimited number of active promotions that do not have the This promotion can be automatically applied box checked, and you can apply these promotions manually.

Promotions With Unspecified Schedules or Locations

Promotions with blank date ranges and blank locations are considered as “any date and any location”. These promotions are counted as one of the 30 active promotions available for automatic application. You cannot create more than 30 active “any date and any location” promotions.

Coupon Codes and Auto-Apply

Promotions that have the **This promotion can be automatically applied** box checked are limited to Multiple Use coupon codes. Single-use coupon codes cannot be automatically applied.

Changing Customer Details After Applying Promotions

If the customer details change after promotions have been applied to a transaction, you should clear all lines on the Promotions subtab. Promotions that have been previously added and are no longer available to the new customer are not automatically removed. The discount these promotions offer is not applied to the transaction, but any single-use coupon codes associated with these promotions will be used.

Planning Automatically Applied Promotions

When planning what promotions you want to be available for automatically applying to a transaction, you need to consider the Auto-Apply Promotions limits. For more information, see Auto-Apply Promotions Limits.

To make additional promotions active, you may need to make some existing active promotions inactive. Consider the following scenario:

- Promotion locations:
  - Barcelona
  - New York
- Promotion date ranges:
  - October
  - November

The following tables illustrate some basic combinations of active promotions that can be created and can be available for automatically applying to transactions.

Combination 1

Combination 1 shows that the number of active promotions that can be automatically applied is 120, if you specify distinct date ranges for each location. You can have 30 active promotions for each date range, per location. This is the maximum number of automatically applied promotions that it is possible to create in this scenario.

Combination 1: total number of active promotions is 120			
	Unspecified Date Range	October	November
Unspecified Location	0	0	0
Barcelona	0	30	30
New York	0	30	30

Combination 2

Combination 2 shows that by specifying a location in each promotion without specifying a date range, the number of active promotions that can be automatically applied is decreased. You can have 30 active promotions per location.

Combination 2: total number of active promotions is 60			
	Unspecified Date Range	October	November
Unspecified Location	0	0	0
Barcelona	30	0	0
New York	30	0	0

Combination 3

Combination 3 shows that when no date ranges or locations are specified on any active promotion, the maximum number of active promotions that can be automatically applied is limited to 30.

Combination 3: total number of active promotions is 30			
	Unspecified Date Range	October	November
Unspecified Location	30	0	0
Barcelona	0	0	0
New York	0	0	0

Combination 4

Combination 4 shows that you can have various combinations of specific date ranges and locations.

Combination 4			
	Unspecified Date Range	October	November
Unspecified Location	0	5	0
Barcelona	10	15	20

In this example, the following active promotions are available in Barcelona during October:

- the 5 promotions for October with no specified location count as 5 of the promotions for Barcelona during October
- there are also 10 promotions for Barcelona with no specified date range
- the maximum number of active promotions that can be automatically applied specifically to Barcelona during October is 15

  5 October with no specified location + 5 Barcelona with no specified date + 15 Barcelona in October = 30 active promotions.

Upsell Manager

The Upsell Manager enables you to maximize your sales and marketing efforts by determining which items present a good upsell opportunity and which customers you should target. This process is also known as **product affinity analysis**.

The Upsell Manager searches your customer transaction histories to recommend possible upsell items and categories of items. These upsell items and item categories are chosen based on their **correlation**. Correlation is a measure of how often two items are purchased by the same customer.

For example, Wolfe Electronics uses NetSuite's Upsell Manager to determine that 30% of customers that bought desktop computer systems also purchased store warranties on those machines. Wolfe decides to create a list of customers that have purchased desktops that have not yet purchased warranties in the hopes of upselling store warranties.

Another value used by the Upsell Manager is **lift**. Lift is the difference between an item's correlation and its purchase rate (percentage of customers who have purchased it).

Then, NetSuite creates a list of customers that are likely to buy the items you choose to upsell. The Upsell Manager then guides you through each step in the process.

When you have determined which items to upsell and which customers to target, you can choose to create:

- a customer group that you can target in marketing campaigns
- tasks for each customer's sales rep to upsell the selected upsell items to
- scheduled phone calls for each customer
- opportunities for each customer that include the upsell items

You can also determine upsell items on customer records or on sales transactions. When the Upsell Manager feature is enabled:

- an Upsell subtab appears on customer records listing potential upsell items for the customer
- an Upsell Items button appears on sales transactions. After you select items on the transaction, click Upsell Items to see a list of items that correlate with the items you have chosen.

Note: To maintain NetSuite's performance, it is strongly recommended that you set upsell preferences at Setup > Sales > Upsell Preferences to limit the number items that are shown on the Upsell subtab of the customer record and the Upsell Items popup on transactions.

To upsell to your customers, you can:

- Create lists of upsell customers using the Upsell Manager Wizard at Campaigns > Marketing > Upsell Manager.
- On sales transactions, use the upsell items popup to add upsell items to a transaction.
- From customer records, view a list of upsell items and create opportunities for those items.

To turn on the Upsell Manager feature, an administrator can go to Setup > Enable Features > CRM, check the Upsell Manager box, and click Save.

Using the Upsell Manager Wizard

The NetSuite Upsell Manager enables you to maximize your sales and marketing efforts by determining which items or item categories present a good upsell opportunity and which customers you should target.

The Upsell Manager searches your customer transaction histories to recommend possible upsell items. These possible upsell items or categories of items are chosen based on their correlation. Correlation is the percentage of customers who purchased the upsell item and another item.

To upsell with the Upsell Manager, go to Campaigns > Marketing > Upsell Manager.

Step 1 of 5: The Upsell Manager Wizard

There are two ways to use the Upsell Manager to determine upsell items and target customers. You can base your upsell on:

- **Items to Upsell** – Choose this option if you already know which items or item categories you want to upsell.
- **Items Purchased** – Choose this option if you are not yet sure which items or item categories you want to upsell. This option lets you search for upsell items based on past purchases.

Then, click **Next**.

Next, you can select upsell items.

Step 2 of 5: Selecting Upsell Items

You can either selecting the items you want to upsell or search for items that provide strong upsell opportunities. Click one of the following links:

Upselling Based on Items to Upsell

If you base your upsell on items to upsell, you first select your upsell items or item categories. NetSuite presents a list of items and categories that have sold well with the upsell items you chose.

This correlation between purchased items and upsell items is shown as the percentage of customers who have purchased both the upsell item and the correlated item.

After choosing the upsell items you will use these items to create a list of customers that have purchased the correlated item but have not purchased the upsell item.

> For example, a Wolfe Electronics sales rep wants to upsell service plans. They use the Upsell Manager to determine that there is a strong correlation between service plans and desktop computers. They create a group of customers that have purchased desktop computers but have not yet purchased service plans.

To select specific upsell items:

1. Select the items or item categories you want to upsell in the **Items to Upsell** field.

   Hold **CTRL** to select more than one item.
2. You can set the following upsell search criteria to filter your upsell item search results:
   - **Correlation Greater Than** – only items with correlation greater than what you set here are returned in your upsell item search.

     Correlation is the percentage of customers that purchased both the upsell items and each item in your upsell search results.
   - **Count Greater Than** – only items with a greater count than what you set here are returned in your upsell item search.

Count represents the number of customers that have purchased both the upsell items and each item in your upsell search results.

3. Click **Search**.

   A list of items and categories that have correlation with the upsell items you selected appears.
4. If you need to change your search criteria, make your changes, and click **Refresh**.
5. Select the pair of items you would like to base your upsell on by checking the box in the **Apply** column.
6. Click **Next**.

NetSuite automatically creates a customer search based on items purchased.

You can now set additional criteria for your upsell customer search.

Upselling Based on Items Purchased

If you base your upsell on items purchased, you first select items customers have purchased in the past, and NetSuite presents a list of upsell items that have sold well with the purchased items.

This correlation between purchased items and upsell items is shown as the percentage of customers who purchased the correlated item as well as the upsell item.

> For example, a Wolfe Electronics sales rep uses the Upsell Manager to decide which items they can upsell to their customers. They determine that there is strong correlation between desktop computers and wireless routers. They create a group of customers that have purchased desktop computers but have not yet purchased wireless routers.

To select upsell items based on items purchased:

1. Select the purchased items in the **Items to Upsell** field.

   Hold **CTRL** to select more than one item.
2. You can set the following upsell search criteria to filter your upsell item search results:
   - **Correlation Greater Than** – only items with correlation greater than what you set here are returned in your upsell item search.

     Correlation is the percentage of customers who purchased both the upsell item and each item in your upsell search results.
   - **Lift Greater Than** – only items with greater lift than what you set here are returned in your upsell item search.

     Lift is the degree to which the item's correlation exceeds its overall purchase frequency (**correlation - purchase frequency**). Purchase frequency is the percentage of customers who have purchased an item.

     A high lift implies a more reliable correlation.

     For example, Wolfe Electronics has sold Impressivo 3000 laptops to 100 customers. Four of the customers also purchased a premium warranty. The correlation between the laptop and the warranty is 40%. Wolfe has 1000 customers, so the purchase frequency is 10%. The lift is 30%.

     Wolfe has sold its less expensive Impressivo 1000 laptops to 300 customers. 150 of these customers purchased the premium warranty, giving a correlation of 50% and a purchase frequency of 30%. The lift is 20%.

- **Count Greater Than** – only items with a greater count than what you set here are returned in your upsell item search.

  Count represents the number of customers that have purchased both the upsell items and each item in your upsell search results.

3. Click **Search**.

   A list of potential upsell items appears.
4. If you need to change your search criteria, make your changes, and click **Refresh**.
5. Select the pair of items you would like to base your upsell on by checking the box in the **Apply** column.
6. Click **Next**.

You can now set additional criteria for your upsell customer search.

Step 3 of 5: Additional Customer Criteria

After you have chosen your upsell items or item categories, you can define the list of customers you are targeting with the upsell.

By default, the customer search finds customers that have purchased the upsell items but have purchased other correlated items. You can set additional criteria if you want to filter the results further.

If you do not want to set additional criteria, click **Next**.

To add criteria to the customer search:

1. On the **Criteria** subtab, select a filter.
2. Enter the filter criteria.
3. Click **Add**.
4. Repeat these steps for each additional filter.

You can also change the way your customer search results appear.

To change how your results display:

1. Click the **Results** subtab.
2. At the top of the subtab, choose which columns determine the order of the list of results.
3. In the **Field** column, select a field to add a column to the results.
4. Click **Add**.
5. Repeat these steps for each new column.

After you have set additional criteria, click **Next**. NetSuite searches for customers that match your criteria and returns a list of results.

Now, you can preview your list of upsell customers.

Step 4 of 5: Previewing Your Upsell Customer List

After you have accepted your customer search criteria, NetSuite returns a list of customers that fit your criteria.

If you want to exclude any of these customers from the upsell effort, clear the box in the **Apply** column next to the customer's name.

If you want to return to the search criteria page, click **Back**. To accept the customer list, click **Next**.

> **Note:** Clicking **Next** does not contact customers.

When you have chosen the customers you want to include, you can choose upsell actions.

Step 5 of 5: Choosing Upsell Actions

After you have selected your upsell customers, you can choose how NetSuite proceeds with the results.

On the Choose Upsell Action page, there are four options. You can choose any of these actions for this upsell effort.

For each upsell action, enter information in the accompanying fields for NetSuite to use when creating the records.

> For example, a Wolfe Electronics sales rep chooses to create opportunities from upsell customer search results. In the Title field, they enter **Store Warranty Upsell**. For the expected close date, they enter the last day of the month. An opportunity is created for each customer in the upsell customer results with the same title and expected close date.

- **Create a group of customers to upsell to**

  If you choose this action, a group record is created in NetSuite from this list of upsell customers. You can then create a marketing campaign targeting this group or perform a bulk merge offering the upsell items to these customers.
- **Create tasks for the sales reps assigned to the upsell customers**

  If you choose this action, task records are created in NetSuite assigned to the sales rep for each customer.
- **Schedule phone calls for each upsell customer**

  Choosing this action creates phone call records for the sales rep assigned to each customer.
- **Create opportunities for each upsell customer**

  Choosing this action creates opportunity records for each customer. These opportunities have the upsell items selected by default.

> **Note:** You can create opportunities only for upsell items. You cannot add item categories to opportunities.

After you have chosen your upsell actions, click Finish.

Upselling From Customer Records

When viewing customer records, you can view a list of potential upsell items and item categories.

The Upsell subtab presents suggested upsell items that have sold well with items that customers have purchased.

The list of upsell items also displays a correlation and count for each set of items. Correlation is the percentage of customers that purchased the upsell item as well as the items purchased by the customer. The Count value indicates the number of customers that have purchased both items, which gives you an idea of the reliability of the correlation.

For example, Wolfe Electronics considers two items for upselling. The first item has a correlation of 50% and a count of 6. The second item has a correlation of 20% with a transaction count of 150. The higher count value for the second upsell item indicates that its correlation is less likely to be coincidence. Wolfe decides that the second item is a better item for upsell.

To upsell from a customer record:

1. Go to Leads > Relationships > Customers.
2. Click **View** next to the name of the customer you want to upsell to.
3. Click the **Sales** subtab.
4. Click the **Upsell** subtab.

   This subtab shows a list of items, their correlation and a count of transactions in which the two items appear together.
5. Click the **Create Opportunity** button.

   A new opportunity opens with the customer selected automatically.
6. Click the **Items** subtab.
7. Click **Upsell Items**.
8. In the Upsell Items popup, check the boxes next to the items you want to upsell to the customer.
9. Click **Submit**.

   These items are added to the opportunity.
10. Add additional items and enter other information on the opportunity.
11. Click **Save**.

Now that an opportunity has been created for these items, your sales team can negotiate the offer with the customer.

Note: To maintain optimal NetSuite performance, it is strongly recommended that you set upsell preferences at Setup > Marketing > Upsell Preferences to limit the number items that are shown. These limited items appear on the Upsell subtab of the customer record and the Upsell Items popup on transactions.

Upselling on Transactions

When you enter an estimate, sales order, cash sale, invoice or opportunity, you can view a list of upsell items.

This Upsell Items popup lists items and item categories that have historically sold well with the items on the transaction.

Each upsell item is shown with correlation and count values to help you determine the best upsell candidate. An upsell item's correlation is the percentage of customers that purchased both the upsell item as well and the items you selected on the transaction. The count displays the number of transactions in which the items are purchased together.

For example, a sales rep creates a sales order for a new laptop computer system. After selecting the laptop on the Items subtab, they click the Upsell Items button. At the top of the Upsell Items list, they see that 13% of transactions that include this model of laptop also include wireless routers. They ask the customer if they are interested in a router and add it to the order.

Note: NetSuite searches for correlation on each item separately when searching for potential upsell items.

To choose an upsell item on a transaction:

1. Create a new sales transaction.
2. On the **Items** subtab, add at least one item to the transaction.
3. Click **Upsell Items**.
4. In the Upsell Items popup, check the boxes next to the items you want to upsell to the customer.
5. Click **Submit**.

   The item is added to the transaction.

Note: To maintain optimal NetSuite performance, it is strongly recommended that you set upsell preferences at Setup > Marketing > Upsell Preferences to limit the number items that are shown. These limited items appear on the Upsell subtab of the customer record and the Upsell Items popup on transactions.

Upsell Preferences

Before you begin using the Upsell Manager, set the following preferences at Setup > Sales > Upsell Preferences :

- **Items to Upsell** – When you are upselling from transactions or from the customer record, a list of possible upsell items is shown. This list of items can be generated based on item correlation or from related items. Upsell items are items that have positive correlation with previously purchased items. Related items are items that have been manually selected on the Related Items subtab of item records.

  You can choose from the following:

  - **Show Upsell Items and Related Items** – Both related items and items with correlation show on the Upsell subtab and in the Upsell Items popup.
  - **Show Upsell Items If There Are No Related Items** – Related items are shown on the Upsell subtab and in the Upsell Items popup. If there are no related items, items that correlate with past purchases are shown instead.
  - **Show Only Related Items** – Only related items show on the Upsell subtab and in the Upsell Items popup.
- **Minimum Correlation** – When suggesting upsell items, NetSuite presents a correlation value for each pair of items.

  Correlation is the percentage of customers that purchased the upsell items and each item in your upsell search results. Enter a minimum correlation to:

  - filter the suggested upsell items on the Upsell subtab of customer records and on the Upsell Items popup on transactions

    - appears by default in the Correlation Greater Than field on the Select Upsell Items page when using the Upsell Manager

- **Minimum Lift** – Lift is the degree to which the item's correlation exceeds its overall purchase frequency. Lift helps you filter out basic items that are sold in a large percentage of transactions. A high lift implies a more reliable correlation. For example, for an electronics dealer might notice that CD-Rs have very low lift since they are sold in many transactions with unassociated items.

  Enter the degree of lift that:

    - is used to filter items on the Upsell subtab of customer records and on the Upsell Items popup on transactions
    - appears by default in the Lift Greater Than field on the Select Upsell Items page when using the Upsell Manager

- **Minimum Count** – Count represents the number of customers that have purchased the upsell items and each item in your upsell search results. Enter the count that:

    - is used to filter items on the Upsell subtab of customer records and on the Upsell Items popup on transactions
    - appears by default in the Lift Greater Than field on the Select Upsell Items page when using the Upsell Manager

After you set these preferences, click Save.

Limits on Upsell Manager Data

The amount of upsell data that is stored on your account depends on how many **items** or **customers** you have. The larger of these two values is used to determine your allocation. Examples of allocations are given in the table below, along with an explanation of how NetSuite calculates larger-sized accounts.

Number of customers / items	Number of correlations / recommendations allowed
<2000	100
5000	40
10000	20
25000	8
50000	4
100000	2

For accounts with more than 2000 items or customers, NetSuite calculates the maximum number of correlated items and customer recommendations by:

1. Looking at the number of items or customers you have in your account and using the larger of these two values (e.g 4500 customers).
2. Dividing this number by 2000* (e.g 4500 / 2000 = 2.25).
3. Dividing 100** by the figure above (e.g 100 / 2.25 = 44).
4. This figure is the number of correlated items and customer recommendations you are allocated (e.g an account with 4500 customers is allowed 44 recommendations per customer and 44 correlations per item)

* the customer/items threshold.

** the correlations/recommendations threshold.

Note: The upsell data for accounts exceeding 2000 customers/items is updated weekly.

Product Affinity Analysis in Search

You can use upsell data in item search results. This allows you to create reports and saved searches that give information on customer purchasing patterns.

The following fields are available as criteria or as result columns:

- **Correlated Item** - this includes all of the items that have been purchased by the same customer as a certain item.

  (Correlation is the percentage of customers who have purchased both the correlated item and the upsell item.)
- **Correlated Item Count** - this is the number customers who have purchased both the upsell item and the correlated item
- **Correlated Item Lift** - this is the lift between the upsell item and the correlated item

  (Lift is the difference between the correlation and the purchase rate of the correlated item, or the percentage of customers who have purchased a certain item.)
- **Correlated Item Purchase Rate** - this is the percentage of customers who have purchased the correlated item
- **Correlated Item Fields** - this field group includes all of the fields on the item record of the correlated item

The information in these fields is updated according to the number of items or customers you have. For more information, see Limits on Upsell Manager Data.