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Overview

As a Merchandiser, you are responsible for forecasting and delivering the forward planning of your department. Furthermore, you are required to deliver sales in order to meet your company's required commercial targets. We also recognize that your role may include or overlap with a Marketing role therefore tasks such as creating search synonyms and promotions are also important.

Merchandising responsibilities may include:

- Range planning
- Collaborating with buyers to achieve marketable ranges, and managing the performance of your ranges throughout the season
- Analyzing sales information
- Producing sales projections
- Formulating range strategy, utilizing relevant performance data to support your proposals
- Managing profit performance through limiting risk, maximizing profit and managing departmental sales performance to achieve bottom line results
- Helping with promotions and advertising campaigns

NetSuite has all the merchandising tools you need in order to successfully meet these demands. From core features such as Merchandise Hierarchy, Promotions, and Searchandising, to website applications such as Correlated Items or Best Sellers.

Let's imagine you have a new product ready to launch. What are the tasks required to help you successfully launch the product and then monitor the performance of your new product? We can take a look at how you can do all of this in NetSuite.

1. First of all, the product needs to be configured in NetSuite:
   - It will be added to the product inventory. For more information, see the help topic Inventory Management.
   - You will also want to set it up to appear on your website. Detailed instructions are available in the Item Configuration for Web Stores topic.
   - You can also use storefront product tools to add Product Images, assign the item to a Commerce Categories, set up Product Reviews, and more.

2. You will want your customers to be able to find the new product on your website. There are several things you could do here to ensure your product is visible on your website:
   - You can set up search synonyms to ensure it is discoverable. For more information, see Search Synonyms.
   - You can use Storefront Merchandising Tools extensions to present the new product to customers while they shop on your website, such as Correlated and Related Items, Best Sellers, or Featured Product.

3. You can also monitor activity related to orders of your new product on your website with storefront order features. These include Quantity Pricing to encourage upselling, and Product Lists or Save For Later which provide an indication of the popularity of your product and also encourage sales.

4. In order to analyze sales information and produce sales projections, you will need detailed reports, organized by product categories. To set these up you can create a merchandise hierarchy and assign items to it. For more information, see Merchandise Hierarchy.

5. Finally, you could create promotions to incentivize your customers to buy the product. For more information, see Promotions.
Merchandising Features

The following merchandising features are omni-channel and support Web, In-Store, Order Management, and Email.

Merchandise Hierarchy

Manage the planning, purchasing and tracking stages of your product lifecycle. Merchandise Hierarchy provides a useful tool that helps you analyze sales, purchase and inventory data that is rolled up by hierarchy categories.

Promotions

Motivate your customers to purchase products in higher quantities by offering various types of promotions or discounts, including Item, Fixed Price Item, Order, Shipping, and Free Gift promotions. Promotions can help you to move out-of-date stock, increase sales, and reward valuable clients. With SuitePromotions, you can also combine promotions on the same transaction and automatically apply eligible promotions.

Searchandising

Powerful merchandising search capabilities, that help your customers quickly find the items that they are looking for with minimum navigation. Commerce Merchandising provides everything you need to enhance the item search capabilities for your website to ensure your customers find the merchandise you want them to find.

Merchandising Storefront Features

The following features are specifically designed for storefront application, helping you manage your merchandise directly on your website.

- **Storefront products** - manage and configure your merchandise on your website:
  - Item Configuration for Web Stores
  - Product Images
  - Commerce Categories
  - URL Components
  - Product Reviews

- **Storefront orders** - Encourage sales and upselling of your merchandise on your website:
  - Quantity Pricing
  - Product Lists
- Save For Later

**Storefront Marketing** - Promote selected merchandise on your website:

- Storefront Merchandising Tools
  - Product Merchandising
  - Correlated and Related Items
  - Best Sellers
  - Featured Category
  - Featured Product
  - Gifts

- Advertising
  - Product Feeds
  - Testimonials
  - Logo List
Merchandise Hierarchy

Merchandise Hierarchy lets you efficiently categorize and manage products or items across your enterprise. Merchandise Hierarchy can help you with planning, purchasing, and tracking your product inventory.

Merchandise Hierarchy Overview

Merchandise Hierarchy helps you to identify market trends and realize shopper buying and demand by providing a customizable organization of your company's merchandise.

You design merchandise hierarchies to represent how you categorize your items or products during a particular time period and assign the items to the hierarchy. After you have assigned items, you have a strong framework that you can use in the downstream workflow for workbooks, reports, pricing, promotions, and more. This framework enables you to make informed merchandising decisions.

Organizing your workbooks or reports using Merchandise Hierarchy makes it easier to see specific details. Such information helps to identify sales trends across product classes and is invaluable when determining sales strategies such as promotions. For example, you can create a workbook to examine sales by department that at a glance shows you that sales of men's organic cotton T-shirts are much lower than expected.
Merchandise Hierarchy Overview

**Note:** Do not confuse the Merchandise Hierarchy feature with Commerce Categories, a SuiteCommerce feature designed to help you create hierarchical product structures on your websites. Commerce categories presents items on your website in a structured way that makes it easy for your shoppers to find them. For more information, see the help topic Commerce Categories.

Each merchandise hierarchy is multi-level with the highest level providing an overall enterprise view and then narrowing down to families or classes of products. Hierarchy levels help you to determine the relationships between items. This enables you to efficiently manage items throughout the enterprise workflow while planning, buying, merchandising, pricing and more.

Hierarchy levels contain nodes which provide simplified product definition and enable alternate views of product classifications. For example, a hierarchy level for women's clothing may contain different nodes for each of the available item classes such as skirts, pants, T-shirts, and shirts.

Merchandise hierarchies are customizable, so you can label each hierarchy level and node as needed to completely match your enterprise.

The Hierarchy Manager lets you visualize and manage the merchandise hierarchies you create. For more information, see The Hierarchy Manager.

View the Merchandise Hierarchy overview video

**Configuring Merchandise Hierarchy**

To use Merchandise Hierarchy in NetSuite, an administrator must first ensure the required features are enabled.

**Enabling Merchandise Hierarchy Features**

An administrator can enable the Merchandise Hierarchy feature at Setup > Company > Setup Tasks > Enable Features (Administrator) on the Items & Inventory subtab.
Configuring Merchandise Hierarchy

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.

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.

The Merchandise Hierarchy and Custom Segments features must be enabled before you can use Merchandise Hierarchy.

To apply attributes to items assigned to a hierarchy you also need to ensure that the Custom Record feature is enabled.

To enable the Merchandise Hierarchy feature:

1. Go to Setup > Company > Enable Features, and click the Items & Inventory subtab.
2. Under Items check the Merchandise Hierarchy box.
3. Click OK to enable the Custom Segments feature if prompted.

Note: Merchandise Hierarchy requires the Custom Segments feature to be enabled. If Custom Segments is not enabled you will be prompted to enable this feature when you check the Merchandise Hierarchy box. For more information, see the help topic Custom Segments.
4. Click Save.

To enable the Custom Record feature:

1. Go to Setup > Company > Enable Features, and click the SuiteCloud subtab.
2. Under SuiteBuilder check the Custom Records box.
3. Click Save.

For more information regarding attributes, see Applying Attributes to Items in a Merchandise Hierarchy.

Merchandise Hierarchy Roles and Permissions

If you use custom roles that you want to use for creating merchandise hierarchies, assign the following permissions to those roles:

- Merchandise Hierarchy Level - Full
- Merchandise Hierarchy Node - Full
- Merchandise Hierarchy Version - Full

To assign these permissions to a role:

1. Go to Setup > User/Roles > Manage Roles (Administrator) and open the Role that needs to be granted Merchandise Hierarchy permissions.
2. Under the Permissions subtab, click Setup and assign the permissions to the role.

The Hierarchy Manager

The Hierarchy Manager is a tool that lets you visualize and edit your merchandise hierarchies.

To open the Hierarchy Manager, go to Setup > Merchandise Hierarchy > Hierarchy Manager (Administrator).
1 Hierarchy Tree Panel - Displays the selected hierarchy version tree. You can select nodes in this panel to view the items assigned to the node in the Information Panel.

2 Information Panel - Displays information regarding the items assigned to a node selected in the Hierarchy Tree Panel. You can assign and remove items here, and search for specific items assigned to a node in the search field. Click on an item in the list to open the item record.

3 Version information - Displays the name of the selected hierarchy version and the dates that the version is active. By default, when the Hierarchy Manager is opened, it will load the currently active hierarchy version if an active version is available. For more information, see Creating a Hierarchy Version.

4 Click the Create Level button to create a new level assigned to the selected hierarchy version. For more information, see Creating a Hierarchy Level.

5 Click the Create Node button to create a new node assigned to the selected hierarchy version. For more information, see Creating a Hierarchy Node.

6 Use the Zoom buttons to zoom in or out on the selected hierarchy tree.

7 Click the Actual Size button to restore the selected hierarchy tree to the original size in the Hierarchy Tree Panel.

8 Click the Scale to Fit button to view the entire hierarchy tree in the Hierarchy Tree Panel.

9 Click the Refresh button to refresh the selected hierarchy tree in the Hierarchy Tree Panel.

10 Click the Collapse / Expand button to hide or reveal the Information Panel.

11 Click the Assign button to add items to a selected node. For more information, see Assigning Items to a Node in the Hierarchy Manager.

12 Click the Remove button to remove assigned items from a selected node. For more information, see Assigning Items to a Node in the Hierarchy Manager.

13 Click the Apply Attributes button to apply attributes to items under a selected hierarchy path. For more information, see Applying Attributes to Items in a Merchandise Hierarchy.
A selected node/hierarchy path – select a node to display the items assigned to it in the Information Panel or the attributes applied to items under the selected hierarchy path.

Click the Item List button to show the list of items assigned to the selected node in the Information Panel.

Click the Attribute List button to show the list of attributes applied to items under the selected hierarchy path in the Information Panel.

The Hierarchy Manager displays a selected merchandise hierarchy version in the Hierarchy Tree Panel. This lets you clearly see the structure of your hierarchy and view parent-child node relationships in the hierarchy.

You can also select nodes in the hierarchy to display information regarding the items assigned to the selected node in the Information Panel. Only nodes that have no child nodes can have items assigned to them. In the previous image, the Sandals node is selected and all the items assigned to the Sandals node are listed in the Information panel. Click on an item in the list to open the item record. Furthermore, you can assign items to a node and remove them directly from the Hierarchy Manager. For more information, see Assigning Items to a Hierarchy Node.

Creating a Merchandise Hierarchy

In this section you will learn how to create a merchandise hierarchy manually. For information regarding how to create a hierarchy using data from a CSV import, see Creating a Merchandise Hierarchy by CSV.

To create a merchandise hierarchy manually you must create the following elements in NetSuite:

- **A hierarchy version** – contains the complete hierarchy definition for a specific time period. You may only need one version, which therefore would not have an end date. If you have defined several versions, only one version can be active at any time. See Creating a Hierarchy Version.

- **Hierarchy levels** – provide a useful way to categorize hierarchy nodes and determine the relationships between items. See Creating a Hierarchy Level.

- **Hierarchy nodes** – groupings for merchandise that share similar characteristics. They also provide a point in the hierarchy from where other nodes can be created or products can be assigned. See Creating a Hierarchy Node.

The following diagram shows the recommended workflow for the first time creation of a merchandise hierarchy.
After you create a hierarchy version, you create the levels and nodes for that version in the The Hierarchy Manager.

When all the required elements have been created for your complete hierarchy, you can assign items to the appropriate hierarchy node. For more information, see Assigning Items to a Hierarchy Node.

Creating a Hierarchy Version

A merchandise hierarchy version contains a complete hierarchy definition, including all the levels, nodes and assigned items in the hierarchy. A version can represent a specific time period, although typically you will only need one hierarchy version with no end date.

If you define multiple versions of a merchandise hierarchy in your system, note that only one version will be active at any time.

For more information regarding using multiple hierarchy versions, see Using Hierarchy Versions in Workbooks and Reports.

To create a hierarchy version:

1. Go to Setup > Merchandise Hierarchy > Hierarchy Versions > New (Administrator)
2. Enter a name and description for this hierarchy version.
3. Enter a start date for this hierarchy version. The start date can be in a future or past date, but can be no more than two years in the past.

   **Note:** The End date of a hierarchy versions can not be manually entered. The current version by default will never expire, unless multiple versions are created, therefore no end date will be defined.

   When multiple hierarchy versions are created, the end date of the active version is updated automatically to match the start date of a new scheduled version.

4. If you have previously created levels, you can assign them to your new version if required. Check the **Included in this Version** box for each of the levels to assign to this hierarchy version.
5. Click **Save**.

Editing Hierarchy Versions

You can edit hierarchy versions at any time, to change the start date or change the levels assigned to the version. Note, you can only remove levels from a version that do not have nodes assigned to them.

You can edit a hierarchy version directly from the Hierarchy manager or from the Setup menu.

To edit a hierarchy version from the Hierarchy Manager:

1. Go to Setup > Merchandise Hierarchy > Hierarchy Manager (Administrator).
2. If your setup uses multiple versions, from the Version list select the hierarchy version you want to add the level to.
3. Point to the right of the Version list and click the **Edit Version** button that appears.
a. To edit the start date, either enter the new start date manually in the Start Date field or point to the right of the Start Date field and click the Pick button that appears.

b. To assign existing levels to the hierarchy version, in the Levels In This Version subtab, check the Included in this Version box for each of the levels you want to assign to this hierarchy version.

4. Click Save.

To edit a hierarchy version from the Setup menu:

1. Go to Setup > Merchandise Hierarchy > Hierarchy Versions (Administrator).
2. In the Merchandise Hierarchy Versions list click Edit for the hierarchy version you want to edit.
   a. To edit the start date, either enter the new start date manually in the Start Date field or point the mouse pointer to the right of the Start Date field and click the Pick button that appears.
   b. To assign existing levels to the hierarchy version, in the Levels In This Version subtab, check the Included in this Version box for each of the levels you want to assign to this hierarchy version.
3. Click Save.

Deleting Hierarchy Versions

You cannot delete a hierarchy version that has nodes assigned to it.

To delete a hierarchy version:

1. Go to Setup > Merchandise Hierarchy > Hierarchy Versions (Administrator).
2. In the Merchandise Hierarchy Versions list click Edit for the hierarchy version you want to delete.
3. From the Actions list select Delete.
Creating a Hierarchy Version

Note: If you have assigned nodes to a hierarchy version you cannot delete that version. When you click Delete, a message is displayed providing a link to a list of all the nodes assigned to that version (dependent records). You must manually remove these nodes from the version before it can be deleted.

Creating a Hierarchy Level

Levels provide a useful way to categorize hierarchy nodes and determine the relationships between items. Each hierarchy level divides the merchandise into progressively smaller product classifications. You create levels that match the hierarchy of your enterprise, with complete control over the number of levels you create and how they are named. Note that level names must be unique and cannot be repeated in the same hierarchy.

Levels represent the higher level structure of your enterprise and should not vary much after they have been defined. However, nodes represent the more variable aspects of your enterprise such as product lines.

You should prefix level names with [MH] to indicate that this level is part of a merchandise hierarchy. This is useful when creating workbooks or custom reports and searches for use with Merchandise Hierarchy as it allows you to quickly identify the relevant internal internal custom fields. For more information, see the Using Merchandise Hierarchy to Analyze Sales and Item Performance and Creating Saved Searches Based on a Merchandise Hierarchy.

Merchandise hierarchy levels are ranked. The lowest ranked level (rank 1) represents the top level of your hierarchy and contains the root node of the hierarchy. In our example, the level named [MH] Company at the top of the hierarchy is rank 1 and contains the root node which is named NORSO.

Tip: When creating levels, it is good practice to start with the level that will be ranked 1 — the level at the top of the hierarchy — and proceed creating levels sequentially. By doing so, the levels are automatically ranked sequentially as you create them and you can leave the Insert before field blank.

To create a hierarchy level:

1. Go to Setup > Merchandise Hierarchy > Hierarchy Manager (Administrator).
2. From the Version list select the hierarchy version you want to add the level to.
3. Click the Create Level button.
4. Enter a unique name and description for this hierarchy level. Note, you cannot enter a name that is already used in the same hierarchy version.

Tip: You should prefix level names with [MH] to indicate that this level is part of a merchandise hierarchy. This makes it easy to identify custom merchandise hierarchy fields when creating workbooks or custom reports and searches.

5. To add the new level at the bottom of the hierarchy (highest rank) leave the Insert before field blank. The rank is automatically assigned. Note, you cannot have more than one level assigned to the same rank.

To manually set the level rank, select an existing level in the hierarchy from the Insert Before list. This new level will be placed higher in the hierarchy than the level selected in the list, which means it will have a lower rank.
Creating a Hierarchy Level

6. Click Save.

**Note:** If you have multiple hierarchy versions in your system, you can assign a level to as many hierarchy versions as required. For more information, see Editing Hierarchy Versions.

### Editing Hierarchy Levels

You can edit a hierarchy level to change its name or its rank in the merchandise hierarchy. However, you can only change the rank of a level if it has no nodes assigned to it.

**To edit a hierarchy level:**

1. Go to Setup > Merchandise Hierarchy > Hierarchy Levels (Administrator).
2. In the Merchandise Hierarchy Levels list click Edit for the hierarchy level you want to edit.
   a. To edit the name, enter the new name in the Name field.
   b. To change the rank, select a new level in the Insert Before list. The rank is automatically updated.
3. Click Save.

### Deleting Hierarchy Levels

You cannot delete hierarchy levels that are assigned to a hierarchy version.

**To delete a hierarchy level:**

1. Go to Setup > Merchandise Hierarchy > Hierarchy Levels (Administrator).
2. In the Merchandise Hierarchy Levels list click Edit for the hierarchy level you want to delete.
3. From the Actions list select Delete.

**Note:** If you have assigned the level to a hierarchy version, you cannot delete that level. When you click Delete, a message is displayed providing a link to a list of all the versions (dependent records) that the level is assigned to.

### Creating a Hierarchy Node

Hierarchy nodes provide groupings for merchandise that share similar characteristics. They can either be a point in the hierarchy from which other nodes can be created, or the point in the hierarchy where products are assigned to.

For example, a level named [MH] Group could contain nodes for Men's Wear, Women's Wear, and Accessories. Each of these nodes could have items assigned to them or could have child nodes attached.

There are four node definitions in the hierarchy:

- **Root node** – the node on level one of the hierarchy from which all other nodes originate. In our example the root node is the name of the company (SOLID Jeans & Denim). Note, a hierarchy can have more than one root node.
### Parent node
- any node in the hierarchy that has nodes below it (child nodes)

### Child node
- any node in the hierarchy that has nodes above it (parent nodes)

### Leaf node
- any node in the hierarchy that does not have nodes below it (child nodes)

A node is defined as a root, parent, child, or leaf depending on where it resides in the hierarchy. A root node will also be a parent node and some child nodes will also be parent nodes. Note however, a parent node with nodes below it cannot have items assigned to it. Only leaf nodes can have items assigned to them. For more information, see Assigning Items to a Hierarchy Node.

Each node is given a name which does not need to be unique if the nodes do not share a parent node. You can for example, have two nodes called Tops, if their parent nodes are different. In the following example, one node is a child node of Men's Wear, and one is a child node of Women's Wear.
Creating a Hierarchy Node

To create a hierarchy node:

1. Go to Setup > Merchandise Hierarchy > Hierarchy Manager (Administrator).
2. From the Version list select the hierarchy version you want to add the level to.
3. Click the Create Node button.
4. Enter a name and description for this hierarchy node. Node names do not need to be unique. However, you cannot select the same parent node for two nodes with the same name.
5. To determine where the node fits into the merchandise hierarchy, select one or both of the following options on the Hierarchy Versions subtab:
   - **Hierarchy level** – if you select a hierarchy level, the parent node options in the list are limited to nodes available on levels above the selected level. If you select the lowest ranked level for example, you will create a root node and there will be no options to select from in the Parent node list.
   - **Parent node** – if you select a parent node, the hierarchy level will be defaulted automatically to the level below the parent node. Note that you do not have to accept the default selection.
and can select a different level lower than the selected parent node. This is an example of an asymmetrical hierarchy.

**Important:** After you save a hierarchy node you cannot change its level.

The parent node represents the full path of the selected node back to the root node of the merchandise hierarchy.

In the above example, the parent node for the Jackets node (on a rank 4 hierarchy level) displays three nodes in total, starting with the root node: NORSO : Women’s Wear : Tops.

The parent node field therefore, uniquely identifies a node in the hierarchy when the node has the same name as another node.

6. Click **Save**, or **Save & New** if you want to create another node.

### Editing Hierarchy Nodes

You can edit a hierarchy node to change its name, description, or parent node. If you have defined multiple hierarchy versions in your system you can also assign it to another version. You cannot however, change the level of a node after it has been saved.

You can edit a hierarchy node at any time. If a node has items assigned to it, the merchandise hierarchy will be updated after you save the edits. How long this update takes will depend on the following:

- The quantity of items assigned to the node being edited
- The quantity of transactions associated with the items assigned to the node being edited

During this update, some merchandise hierarchy related data may not include the latest changes and could be inaccurate.

**Tip:** You should wait until merchandise hierarchy updates are completed before using merchandise hierarchy related data in workbooks, reports, and searches.

**To edit a hierarchy node:**

1. Go to Setup > Merchandise Hierarchy > Hierarchy Nodes (Administrator).
2. In the Merchandise Hierarchy Nodes list click **Edit** for the hierarchy node you want to edit.
   a. To edit the name, enter the new name in the Name field.
   b. If you have defined multiple hierarchy versions in your system, on the **Hierarchy Versions** subtab check the **Included in Version** box for each of the hierarchy versions you want to assign this hierarchy node to. You can assign a node to multiple versions.
   
   **Note:** You can only deselect the Included in Version box for a specific version, if the node does not have items assigned to it, or is not a parent node in that version.
   c. To change the parent node, select a new parent node in the **Parent Node** list.
3. Click **Save**.

**Note:** The hierarchy level for a node cannot be edited.

### Deleting Hierarchy Nodes

You cannot delete a hierarchy node that has items assigned to it.

**To delete a hierarchy node:**

1. Go to Setup > Merchandise Hierarchy > Hierarchy Nodes (Administrator).
2. In the Merchandise Hierarchy Nodes list click **Edit** for the hierarchy node you want to delete.
3. From the **Actions** list select **Delete**.

**Note:** If you have items assigned to a hierarchy node, you cannot delete that node. When you click Delete, a message is displayed providing a link to a list of all the items (dependent records) that are assigned to the node.

### Assigning Items to a Hierarchy Node

After you have created a merchandise hierarchy version with the required levels and nodes, you can assign items to leaf nodes in the hierarchy version.

There are multiple ways to assign items to a hierarchy:

- **In the Hierarchy Manager** – select a node you want to assign items to and add the items directly in the Hierarchy Manager. For more information, see Assigning Items to a Node in the Hierarchy Manager.
- **On the Item record** – select an item and assign it to a node in the hierarchy on the Item record. For more information, see Assigning Items to a Node on the Item Record.
- **By CSV** – you can assign items to a merchandise hierarchy by CSV import. For more information, see Assigning Items and Applying Attributes by CSV.

You can only assign items to a leaf node (a node in the hierarchy that does not have child nodes). For example, in the following image, you can assign items to the following nodes:

- NORSO : Men’s Wear : Bottoms : Pants
Assigning Items to a Hierarchy Node

Assigning Items to a Node in the Hierarchy Manager

You can assign multiple items at a time to a specified node in a hierarchy in the Hierarchy Manager.

View the Merchandise Hierarchy item assignment video

To assign an item to a node in the Hierarchy Manager:

1. Go to Setup > Merchandise Hierarchy > Hierarchy Manager (Administrator).
2. In the Version field, make sure you have selected the correct hierarchy version.
3. In the Hierarchy Tree Panel select the node you want to assign an item or items to. In the Information Panel click the Assign button.
4. In the Assign Items popup window select the items you want assign to the node:
   a. In the Available column select the box or boxes next to the items in you want assign to the node.
   b. Click the Add button to add the items to the To Assign column.
   c. Click Done to assign the items to the node.
Assigning Items to a Hierarchy Node

**Tip:** You can manage large lists of items that can be assigned in the Assign Items popup window. Enter a search term in the **Filter** field at the top of the Available Column to limit the items that appear to those that match the term. Click the **View Selected** box to show only the items currently selected in the list.

When you assign or remove items the hierarchy has to be updated. It is important to note that during this update, some merchandise hierarchy related data may not include the latest changes and could be inaccurate. You should wait until merchandise hierarchy updates are completed before using merchandise hierarchy related data in workbooks, reports, and searches. In the Hierarchy Manager a notification at the top of the Information Panel will inform you that the hierarchy is being updated. Furthermore the node in the Hierarchy Tree Panel will change as shown in the following image.
Assigning Items to a Hierarchy Node

After the items have been successfully assigned to the node they are listed in the Information Panel. You can click the notification at the top of the Information Panel to view a list of all the records that have been processed as part of the item assignment.

To remove items assigned to a node in the Hierarchy Manager

1. Go to Setup > Merchandise Hierarchy > Hierarchy Manager (Administrator).
2. In the Version field, make sure you have selected the correct hierarchy version.
3. In the Hierarchy Tree Panel select the node you want to remove an item or items from.
4. In the Information Panel select all the items that you do not want to be assigned to the selected node and click the Remove button.
5. Click Yes, remove when prompted.
Assigning Items to a Node on the Item Record

You can assign items individually to a node in a hierarchy on the Item record.

A field on the Item record called **Hierarchy Node** is used to determine exactly where the item is assigned to the selected merchandise hierarchy. The hierarchy node represents the full path of the node (not just the name of the node) that the item is assigned to. The full path goes back to the root node of the hierarchy. This ensures you can uniquely identify the correct node to which the item should be assigned in the hierarchy, even when the selected node has the same name as another node.

For example, in the following image, if you want to assign women's jackets to a merchandise hierarchy, you need to distinguish between the jackets node for Men's Wear and the jackets node for Women's Wear. The hierarchy node would be: NORSO : Women's Wear : Tops : Jackets.

Parent and child matrix items do not have to be assigned to the same hierarchy node. You can assign child matrix items to different nodes directly from each child matrix item record.

**To assign an item to a node on the Item Record:**

1. Go to Lists > Accounting > Items (Administrator)
2. Locate the item you want to assign to a hierarchy version in the list and click **Edit**.

3. Select the Standard Inventory Part Form in the **Custom Form** list – if it is not already selected. If you do not select this form, you will not be able to see the Merchandise Hierarchy subtab.

4. If you have defined multiple hierarchy versions in your system, on the Merchandise Hierarchy subtab check the **Include in Version** box for the merchandise hierarchy version you want to assign the item to. You can assign an item to multiple versions.

5. Select a hierarchy node in the **Hierarchy Node** list to determine where in the selected merchandise hierarchy the item is assigned. The hierarchy node is the full path of the node the item is assigned to, back to the root of the hierarchy.

6. Click **Save**.

![Image of a hierarchy management interface](image)

After you assign an item to a hierarchy node you can see the item listed when you select the node in the Hierarchy Manager. Click on the item in the Information Panel to open the item record.
Applying Attributes to Items in a Merchandise Hierarchy

Merchandise hierarchy attributes provide you with the option to add an extra layer of classification to items in your hierarchies. Attributes can be created to describe the characteristics of your products and when applied to items, they allow you to look at item performance workbooks or reports from a different angle. They give you greater flexibility to slice your workbooks and reports as needed, no longer limiting you to your product classification by hierarchy nodes.

Furthermore, attributes can be applied to items under a specific hierarchy path directly from the Hierarchy Manager. You can apply attributes in bulk, using Mass Update, or individually as required.

You could for example, create attributes for different fabrics, allowing you to view workbooks that displayed how your denim clothing collections were performing compared to your leather collections. Such attributes would span several nodes which would have been impossible to view prior to the introduction of merchandise attributes.

To apply attributes to items assigned to a hierarchy you also need to ensure that the Custom Record feature is enabled. For more information, see Configuring Merchandise Hierarchy.

Creating Attributes for Merchandise Hierarchies

Merchandise hierarchy attributes are custom item fields that can be applied to a merchandise hierarchy. Attributes provide further granular classification in a merchandise hierarchy workbook or report. When the Merchandise Hierarchy feature is enabled you can use existing custom item fields as attributes, or you can create new custom item fields to serve as attributes as needed.

To create attributes you must create a custom list to which you add the attribute values. For example, to create attributes for various fabrics you first create a fabric list, then add various values to the list for each fabric type, such as denim, leather, wool, polyester, etc.

**Note:** To save a Custom Item Field as a merchandise attribute, you must select List/Record in the Type field, check the Store Value box, check the Merchandise Attribute box, and select all items, item types and sub-types in the Applies To subtab.

For more information, see the Custom Item Fields help topic.

**To create an attribute for a merchandise hierarchy:**

1. Go to Customization > Lists, Records, & Fields > Item Fields.
2. Enter a label for the custom field and a useful description.
3. Select List/Record from the Type list.
4. Select an existing list from the List/Record list or create a new list that contains the attribute values you want to apply to your items.
   - To create a new list:
     a. Move your mouse to the right of the List/Record field and click the New button that appears.
Applying Attributes to Items in a Merchandise Hierarchy

b. Enter a name for your new list.
c. Add the first attribute value in the Value column and click the Add button. Repeat to add all attribute values to the list.
d. Click Save when all values have been added.

5. Check the Store Value box.
6. Check the Merchandise Attribute box.
7. On the Applies To subtab, check the boxes next to all items, item types, and sub types.
8. Click Save.

Applying Attributes to Items Under a Merchandise Hierarchy Path Using Mass Update

After you have created hierarchy attributes you can apply them to items directly from the Hierarchy Manager.

Attributes are applied to one or more items in the Hierarchy Manager using the Mass Update feature. For more information, see the Mass Changes or Updates topic.

Filters for the mass update are automatically created based on the node selection in the Hierarchy Manager. You can therefore, quickly create a mass update to apply attributes to all the items under a selected node path by selecting the parent node. Note that the parent node you select in the Hierarchy Manager is the starting point for the mass update filter, but you can edit the filters as required before you perform the update. This way you can fine tune the items to which the attribute is applied.

For example, if you want to apply attributes to multiple items in your Women's Wear department, including tops and bottoms, select the Women's Wear parent node. When you click the Apply Attributes button, all the items in the hierarchy path under women's wear will be included. You can edit the filters during the process to exclude certain items or manually select which items the attribute should be applied to. You will repeat the process for each attribute value.

Note: If you have not created any attributes, the option to apply attributes to the hierarchy will not be visible. See Creating Attributes for Merchandise Hierarchies.

To apply attributes to items in the Hierarchy Manager:

1. Go to Setup > Merchandise Hierarchy > Hierarchy Manager (Administrator).
2. Select a node in the Hierarchy Manager that will define the filter for the mass update. All items under the selected hierarchy path will be selected. You can modify the item selection later in the process.
3. Click the Apply Attributes button at the top of the Item List.
4. Modify the default name for the mass update in the Title of Action field if required.
5. Modify the filter criteria on the **Criteria** subtab if required.
6. On the **Mass Update Attributes** tab check the box next to the appropriate attribute list and select the specific attribute **Value** you want to apply.

7. Click **Preview Items** to view the items that the attribute will be applied to.
8. Clear the boxes next to all the items you do not want to apply the attribute to.
9. Click **Perform Update** to apply the attribute to the selected items.

You must repeat the above procedure for each attribute you want to apply to items in the hierarchy.

Click the **Attribute List** icon 📚 at the bottom of the Information Panel to view all the attributes that have been applied under a selected hierarchy path.

### Applying Attributes to an Item on the Item Record

You can apply attributes to individual items assigned to a hierarchy directly on the Item record.

**To apply attributes to individual items on the Item record:**

1. Open the Item record.

2. Click the **Edit** button.

3. On the **Custom** subtab, select the attributes you want to apply to the item. If the attribute value does not exist, move your mouse to the right of the appropriate attribute list and click the **New** button that appears.

4. After selecting the attributes, click **Save**.

### Creating a Merchandise Hierarchy by CSV

You can create parts of a merchandise hierarchy by CSV import when you have merchandise hierarchy data available in a CSV (comma-separated value) file.

You can do the following:

- Import merchandise hierarchy nodes to an existing merchandise hierarchy version (import type: Classification)
- Import items to a merchandise hierarchy (import type: Items)
- Update existing items to assign them to a merchandise hierarchy (import type: Items)
- Apply attributes to items assigned to a merchandise hierarchy (import type: Items)

You cannot import merchandise hierarchy versions or levels. Therefore, before you import merchandise hierarchy nodes, you must first create a hierarchy version and the levels to which the nodes will be assigned. For more information, see Creating a Hierarchy Version and Creating a Hierarchy Level.

For more information, see the CSV Imports topic.

Creating Nodes in Bulk by CSV

When you are creating a new merchandise hierarchy, adding new nodes to an existing hierarchy, or re-parenting existing nodes you can import the nodes in bulk by CSV import.

The following is an example of a CSV file and the results displayed in the Hierarchy Manager when the CSV file is imported into NetSuite.

Note that the parentnode value assigns a parent node using the ExternalID of the parent node. For example, the parentnode value for Women's Wear is 100, this is the ExternalID for NORSO, and therefore makes NORSO the parent node for Women's Wear.

For information regarding the importing of merchandise hierarchy nodes by CSV, see the help topic Merchandise Hierarchy Node Import
Assigning Items and Applying Attributes by CSV

You can add and assign new items or existing items to a merchandise hierarchy by CSV import. You can also apply existing attributes to the items in the same CSV import.

The following image is an example of a CSV file containing items and attributes.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Name</td>
<td>Version Name</td>
<td>Is Included</td>
<td>parenthood</td>
<td>Fabric</td>
<td>Collection</td>
</tr>
<tr>
<td>Skin Tight Jeans</td>
<td>NORSO's Merchandise</td>
<td>T</td>
<td>17</td>
<td>Denim</td>
<td></td>
</tr>
<tr>
<td>Bell Bottom Trousers</td>
<td>NORSO's Merchandise</td>
<td>T</td>
<td>17</td>
<td>Denim</td>
<td></td>
</tr>
<tr>
<td>Denim Mini Skirt</td>
<td>NORSO's Merchandise</td>
<td>T</td>
<td>18</td>
<td>Denim</td>
<td>Summer Fun in the Sun</td>
</tr>
<tr>
<td>High Waist Skirt</td>
<td>NORSO's Merchandise</td>
<td>T</td>
<td>18</td>
<td>Leather</td>
<td></td>
</tr>
<tr>
<td>Rain Boots</td>
<td>NORSO's Merchandise</td>
<td>T</td>
<td>21</td>
<td></td>
<td>Winter Budget Collection</td>
</tr>
<tr>
<td>Honolulu Sandals</td>
<td>NORSO's Merchandise</td>
<td>T</td>
<td>22</td>
<td>Leather</td>
<td>Summer Fun in the Sun</td>
</tr>
<tr>
<td>Rain Coat Jacket</td>
<td>NORSO's Merchandise</td>
<td>T</td>
<td>20</td>
<td></td>
<td>Winter Budget Collection</td>
</tr>
<tr>
<td>Peruvian Poncho</td>
<td>NORSO's Merchandise</td>
<td>T</td>
<td>20</td>
<td>Wool</td>
<td></td>
</tr>
<tr>
<td>Rolling Stones Skirt</td>
<td>NORSO's Merchandise</td>
<td>T</td>
<td>16</td>
<td>Cotton</td>
<td></td>
</tr>
<tr>
<td>Cowl Neck Shirt</td>
<td>NORSO's Merchandise</td>
<td>T</td>
<td>19</td>
<td>Cotton</td>
<td></td>
</tr>
<tr>
<td>Jobs Turtleneck</td>
<td>NORSO's Merchandise</td>
<td>T</td>
<td>15</td>
<td>Polyester</td>
<td>Winter Budget Collection</td>
</tr>
<tr>
<td>Prada Blouse</td>
<td>NORSO's Merchandise</td>
<td>T</td>
<td>19</td>
<td>Cotton</td>
<td></td>
</tr>
<tr>
<td>Cool Camisa</td>
<td>NORSO's Merchandise</td>
<td>T</td>
<td>19</td>
<td>Polyester</td>
<td></td>
</tr>
</tbody>
</table>

Note that you can assign a parent node for an item in two ways:

- Enter the Internal ID of the parent node (as shown in the example above). During the import, remember to change the reference type of the parent node to **Internal ID** when mapping the fields.

- Enter the full path of the selected node back to the root node of the merchandise hierarchy. For example NORSO : Women's Wear : Bottoms : Pants. If you select this method you will have to ensure that the path is entered correctly, observing that there is space, a colon, and another space in between each node in the path.

You can apply attributes by adding existing attribute values to a column or columns in the CSV file. The Attributes will be available to map to in the list of NetSuite fields.
After the items have been imported you will see the items assigned to the appropriate node in the Hierarchy Manager.

For information regarding importing or updating items by CSV, see the Items Import topic.

### Exporting Merchandise Hierarchies

You cannot export a complete merchandise hierarchy to a single CSV file. You can however, export the following merchandise hierarchy elements to individual CSV files:
Exporting Merchandise Hierarchies

- Merchandise hierarchy versions
- Merchandise hierarchy levels
- Merchandise hierarchy nodes
- Items

You can export the merchandise hierarchy elements from their list pages. Click the Export - CSV icon to export the contents of the list. Only the fields displayed in the list will be exported to CSV. For more information, see the Exporting Reports, Searches, and Lists topic.

Using Merchandise Hierarchy to Analyze Sales and Item Performance

A major benefit of the Merchandise Hierarchy feature is the ability to organize sales and item performance data in SuiteAnalytics workbooks and custom reports. You can enhance your sales workbooks and reports by including merchandise hierarchy elements such as levels and nodes. These elements help you to group and organize data in the reports by product classifications. With Merchandise Hierarchy, you can visualize sales by company branches, groups, departments, classes, or even attributes.

You can create workbooks and custom reports that include merchandise hierarchy internal custom fields combined with any other NetSuite field.

In NetSuite, you can use any of the following tools to analyze sales and item performance:

- **SuiteAnalytics Workbook** – analytical tool available in NetSuite for creating highly customizable workbooks that combine queries, pivot tables, and charts. For more information, see SuiteAnalytics Workbook and Merchandise Hierarchy.
- **Report Builder** – a tool you can use to customize reports’ data and formatting. For more information, see Creating Merchandise Hierarchy Reports.
Using Merchandise Hierarchy to Analyze Sales and Item Performance

- **Saved Searches** – reusable search definitions. For more information, see *Creating Saved Searches Based on a Merchandise Hierarchy.*

SuiteAnalytics Workbook and Merchandise Hierarchy

SuiteAnalytics Workbook enables you to create customizable workbooks that combine queries, pivot tables, and charts. Workbooks are ideally suited to help you analyze items organized in merchandise hierarchies, enabling you to slice sales performance data by product categories (hierarchy nodes).

For more information, see the help topic *SuiteAnalytics Workbook.*

You can use Merchandise Hierarchy with SuiteAnalytics in:

- **Standard SuiteAnalytics Sales workbooks** – include custom Merchandise Hierarchy fields by default. See *Merchandise Hierarchy in Standard Sales Workbooks.*
- **Custom SuiteAnalytics workbooks** – if the standard Sales workbooks do not cover your needs, you can create custom workbooks. See *Creating Custom Merchandise Hierarchy Workbooks.*

Merchandise Hierarchy in Standard Sales Workbooks

You can analyze sales performance sliced by Merchandise Hierarchy elements using standard SuiteAnalytics Sales workbooks. Custom Merchandise Hierarchy fields are included in these standard Sales workbooks by default:

- Sales (Invoiced) Workbook (Beta)
- Sales (Ordered) Workbook (Beta)

If you have the Analytics Administrator permission, you can access the workbooks using the links in the Standard Workbooks list on the Workbook Listing Page.
You can drag the custom Merchandise Hierarchy fields to columns or rows into a pivot table or chart in the workbook to organise the data as needed. The following image is an example of Merchandise Hierarchy fields used in a Pivot by Item table.

For more information, see the help topic Standard Workbooks.

**Note:** Standard Sales workbooks do not include merchandise hierarchy attribute fields by default. To include attributes in your workbooks you must create a custom workbook. For more information, see Creating Custom Merchandise Hierarchy Workbooks.

Creating Custom Merchandise Hierarchy Workbooks

With SuiteAnalytics Workbook, you can create custom workbooks that include all the merchandise hierarchy elements you need, including merchandise hierarchy attributes. SuiteAnalytics Workbook supports multilevel joins, which means you can join fields from multiple records in one single workbook. SuiteAnalytics Workbook also enhances the visualization of data in workbooks, providing better grouping of hierarchical data in pivot tables, and charts.

If the standard Sales workbooks do not include all fields you require in your workbook, you can create a custom workbook by adding the required fields to the Dataset. For more information, see the Custom Workbooks topic.

To include Merchandise Hierarchy fields in a custom workbook, you must manually add them to the workbook. You should start with a Sales record type and find the Merchandise Hierarchy fields under Item in the Formulas panel:
Important: When you have only one hierarchy version defined in your system, you will create merchandise hierarchy workbooks that display the current hierarchy structure and item classification. These workbooks use custom merchandise hierarchy fields that have been added to the item record. They only show the current classification of items in the hierarchy and cannot show different classifications from different hierarchy versions.

For reports that use historical hierarchy data when your system includes multiple merchandise hierarchy versions, see Using Hierarchy Versions in Workbooks and Reports.

Including Attributes in Merchandise Hierarchy Workbooks

The following example shows how to create a workbook that includes merchandise hierarchy attributes. To demonstrate how merchandise hierarchy attributes can be utilized, the workbook will show transactions for items assigned to a specific node: the Women's Wear department. You can change the criteria to produce different types of merchandise hierarchy workbooks as needed.

For more information regarding attributes, see Applying Attributes to Items in a Merchandise Hierarchy.

To create a custom workbook to include merchandise hierarchy fields and attributes you must complete the following steps in order:

1. Start with a standard Sales workbook
2. Add attribute fields to the source data
3. Set up your pivots and charts

Open a Standard Sales Workbook to Include Attributes

You should use a standard Sales workbook as the starting point for any custom merchandise hierarchy workbook because they include custom Merchandise Hierarchy fields by default.
Tip: Do not create a new workbook and use Sales (Invoiced) or Sales (Ordered) as the root record type. The workbook will not include custom Merchandise Hierarchy fields by default.

To open a standard Sales workbook:
1. Click the Analytics tab in the NetSuite navigation menu.
2. On the Analytics dashboard, expand the Standard Workbooks list.
3. Select one of the following standard Sales workbooks:
   - Sales (Invoiced) Workbook (Beta)
   - Sales (Ordered) Workbook (Beta)

Add Attributes to the Source Data in Merchandise Hierarchy Workbooks

The following steps show you how to add attribute fields to the source data of your merchandise hierarchy workbook. Merchandise hierarchy attributes are custom item fields and therefore are located under Item in the Formulas panel on the Dataset tab. Only fields that are added to the Data Grid can be used to generate a pivot table or chart.

In this example we will add the following attribute fields:
- Fabric
- Seasonal Collection

To add attribute fields to the source data of your workbook:
1. Click the Dataset tab.
2. Expand the Item list in the Formulas panel and select the attribute you want to add in the list. In our example, the first attribute we select is Fabric.
3. Double-click the Name field from the Fields panel to add it to the Data Grid.
4. Repeat steps 2 through 3 to add the Name field for the Seasonal Collection attribute.

Your selected attributes are now included in the dataset for your workbook. You can now customize your pivots and charts to include the attribute values.
Customize Pivots and Charts in Merchandise Hierarchy Workbooks

The standard Sales workbooks have several pivots and charts predefined by default. In our example we will customize the Pivot by Item table to include Fabric attribute values. You can add merchandise hierarchy attributes to any of the default pivots and charts or create your own as needed.

To customize a pivot table in your merchandise hierarchy workbook:

1. Click the **Pivot by Item** tab. Note, this tab appears by default in both standard Sales workbooks.
2. Double-click the desired fields in the Fields panel to add them to the Rows tab in the Layout panel.
   In this example we add the following to the **Rows** tab:
   - [MH] Department
   - [MH] Silhouette
   - [MH] Class
   - Name (Fabric attribute)
   **Tip:** Notice that in the Fields panel the Name field for each attribute is simply called Name. You can only rename the field after you have added it to the Rows panel. To edit the name of a column click the **Field Menu** icon and select Rename. You can also remove any prefix you may have added to the level names.
   In this example we also add **Quantity (Sum)** to the ** Measures** tab.
3. Select the **Item** field in the Rows panel and click the **Down Arrow** icon in the Rows panel header to move it to the last row.
4. Click the **Refresh** icon to generate the pivot table.
Important: If any changes are made on the Dataset tab or Pivot table tab, you must click the Refresh icon in the Pivot table tab to update the pivot table.

Remember to save your workbook. You can save your workbook at any time, click the Menu icon, and select Save (or Save As to save a copy of your workbook).

For more details regarding working with pivots, including formatting the layout, changing the summary type, or adding filters, see the Step 4: Pivot Your Source Data topic.

Creating Merchandise Hierarchy Reports

You can create custom reports that include merchandise hierarchy elements using Report Builder.

For more information regarding customizing reports with the Report Builder, see the help topic Report Customization.

Internal Custom Fields for Merchandise Hierarchy Reports

To create customized sales reports that utilize your merchandise hierarchy structure, it is necessary to manually add the internal custom fields that have been created for the merchandise hierarchy in the Report Builder. Internal custom fields are created automatically for all the levels in your merchandise hierarchy when the Custom Segments feature is enabled. These internal custom fields cannot be accessed nor edited. For more information, see Enabling Merchandise Hierarchy Features.

You can use the custom merchandise hierarchy fields created by Custom Segments as columns or filters.

The custom merchandise hierarchy fields are located in the Add Fields list in the Report Builder. Each custom field appears under the label representing the record type where it was applied. For transactions, the custom merchandise hierarchy fields appear twice in the Add Fields list. One instance represents the custom field as a transaction column. The other represents the custom field that has been added to the item record.

When you have only one hierarchy version defined in your system, you will create merchandise hierarchy reports that display the current hierarchy structure and item classification. These reports are also known as item-based reports because they use custom merchandise hierarchy fields that have been added to the item record. They only show the current classification of items in the hierarchy and cannot show different classifications from different hierarchy versions.
Important: In order to create reports that use the current merchandise hierarchy structure, you must select the internal custom fields that have been added to the item record. The location of these custom merchandise hierarchy fields varies depending on the type of report being customized. For more information, see Locating Custom Merchandise Hierarchy Fields for Reports.

Locating Custom Merchandise Hierarchy Fields for Reports

Custom merchandise hierarchy fields are located in the Add Fields list in the Report Builder.

The type of report you want to customize determines the location of the internal custom fields you need to add.

Note: Do not use the internal custom fields described in this section for reports that use historical hierarchy data when your system includes multiple merchandise hierarchy versions. For more information, see Using Hierarchy Versions in Workbooks and Reports.

To locate the internal custom fields needed to create reports using the latest merchandise hierarchy structure, refer to the following table. Note that we have provided details of only the most common types of report that utilize merchandise hierarchy data.

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Report</th>
<th>Custom Merchandise Hierarchy Fields Location</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchases</td>
<td>Purchase by Vendor</td>
<td>Purchases &gt; Item</td>
<td>Select fields with the suffix (Custom Column)</td>
</tr>
<tr>
<td></td>
<td>Purchase by Item</td>
<td>Item Type</td>
<td>Select fields with the suffix (Custom)</td>
</tr>
<tr>
<td></td>
<td>Purchase Order Register</td>
<td>Purchase Order Transactions &gt; Item</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Open Purchase Orders</td>
<td>Open Purchase Orders &gt; Item</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Purchase Order History</td>
<td>Purchase Order Transactions &gt; Item</td>
<td>Select fields with the suffix (Custom Column)</td>
</tr>
<tr>
<td>Inventory/Items</td>
<td>Inventory Profitability</td>
<td>Item</td>
<td>Select fields with the suffix (Custom)</td>
</tr>
<tr>
<td></td>
<td>Current Inventory Snapshot</td>
<td>Inventory Item</td>
<td>Select fields with the suffix (Custom)</td>
</tr>
<tr>
<td></td>
<td>Physical Inventory Worksheet</td>
<td>Inventory Item</td>
<td>Select fields with the suffix (Custom)</td>
</tr>
<tr>
<td></td>
<td>Inventory Valuation</td>
<td>Inventory Item</td>
<td>Select fields with the suffix (Custom)</td>
</tr>
<tr>
<td></td>
<td>Inventory Revenue</td>
<td>Inventory Item</td>
<td>Select fields with the suffix (Custom)</td>
</tr>
<tr>
<td></td>
<td>Inventory Back Order Report</td>
<td>Item Type</td>
<td>Select fields with the suffix (Custom)</td>
</tr>
<tr>
<td></td>
<td>Inventory Activity Detail</td>
<td>Inventory Item</td>
<td>Select fields with the suffix (Custom)</td>
</tr>
</tbody>
</table>
Creating Merchandise Hierarchy Reports

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Report</th>
<th>Custom Merchandise Hierarchy Fields Location</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stock Ledger</td>
<td>Item</td>
<td>Select fields with the suffix (Custom)</td>
<td></td>
</tr>
<tr>
<td>Items Pending Fulfillment</td>
<td>Item Type</td>
<td>Select fields with the suffix (Custom)</td>
<td></td>
</tr>
<tr>
<td>Inventory Turnover</td>
<td>Inventory Item</td>
<td>Select fields with the suffix (Custom)</td>
<td></td>
</tr>
<tr>
<td>Transfer Order Registry</td>
<td>Transfer Order Transactions</td>
<td>Select fields with the suffix (Custom)</td>
<td></td>
</tr>
<tr>
<td>Sales</td>
<td>Sales by Item</td>
<td>Item Type</td>
<td>Select fields with the suffix (Custom)</td>
</tr>
<tr>
<td></td>
<td>Sales by Customer</td>
<td>Sales &gt; Item</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sales by Sales Rep</td>
<td>Sales &gt; Item</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sales by Sales Team</td>
<td>Sales Team Sales &gt; Item</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sales by Partner</td>
<td>Sales &gt; Item</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sales by Historical Team</td>
<td>Historical Revenue &gt; Item</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sales by Historical Team (Transaction Date)</td>
<td>Sales &gt; Item</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sales by Promotion</td>
<td>Sales &gt; Item</td>
<td></td>
</tr>
<tr>
<td></td>
<td>New Customer Sales</td>
<td>Sales &gt; Item</td>
<td></td>
</tr>
</tbody>
</table>

To customize reports for Merchandise Hierarchy:

1. Navigate to the report you want to customize in the Reports menu, and select the customize option.
2. In the Report Builder on the Edit Columns page, edit the name to make it easy to identify in the Saved Reports list.
3. Select the Item Type 1 row and clear the Group box.
4. Optional. Select the Item Type column and click the Remove Column button.
5. Now you need to add the custom merchandise hierarchy fields to your report:

   a. Navigate to the correct custom merchandise hierarchy fields. For example, to add the internal custom fields to a Sales report:
      i. In the Add Fields list on the left, expand the Item Type list.
      ii. Scroll down to the merchandise hierarchy internal custom fields. If you have prefixed the name of the hierarchy levels with [MH] it is easier to locate them in the list.
   b. Drag and drop the internal custom fields into the Report Preview panel.
6. After you have added all the required fields, you can reorder the columns as needed by clicking the Move buttons or by dragging the columns into position.

**Important:** In order to create reports that use the current merchandise hierarchy structure, you must select the correct custom merchandise hierarchy fields. See Locating Custom Merchandise Hierarchy Fields for Reports.
7. Select the columns that you want to be able to collapse and expand as needed in the report and check the Group With Previous Column box for each of them.

8. After you have added the required columns, click Save.

Adding Filters to Customized Merchandise Hierarchy Reports

You can use the custom merchandise hierarchy fields created by Custom Segments as filters for your customized reports. Filters let you restrict the view in the report to a specific node or set of nodes.

**To add merchandise hierarchy filters to your report:**

1. Navigate to the report you want to customize in the Reports menu, and select the customize option.
2. Click Filters in the Report Builder menu to open the Filters page.
3. Now you need to add the custom merchandise hierarchy fields that you want to use as filters:
   a. Navigate to the correct custom merchandise hierarchy fields. See Locating Custom Merchandise Hierarchy Fields for Reports. For example, to add merchandise hierarchy filters to a Sales report:
      i. In the Add Fields list on the left, expand the Item Type list.
      ii. Scroll down to the merchandise hierarchy internal custom fields. If you have prefixed the name of the hierarchy levels with [MH] it is easier to locate them in the list.
   b. Drag and drop the internal custom fields into the Report Preview panel.
4. Select the field that represents the hierarchy level you want to filter on. Notice when you click on the custom field, the fields under the Report Component and Field columns in the Choose Filters panel are automatically pre-populated.
5. Check the box in the Show in Filter Region column for the new filter.
6. Click in the Value field and select Equal to and click Done.
7. After you have added the required filters click **Save**.

You can click the **Preview** button when you are customizing the report to visualize the report before you save it. Click **Return to Customization** to return to the Report Builder.

To view your customized reports, go to Reports > Saved Reports > All Saved reports (Administrator).

**Note:** To view the custom filters in the finished report, click the **More** button to expand the options toolbar at the bottom of the report.

**Example of a Customized Merchandise Hierarchy Report – Sales by Item Summary**

In this section, we will show you how to customize the Sales by Item Summary report to show data from your current merchandise hierarchy item classification.

With a customized Sales by Item Summary report you can show an overview of your sales, not only organized by item, but also by the levels or nodes in your hierarchy version. In the following image you can see the standard Sales by Item Summary report on the left, and the same report including the merchandise hierarchy elements on the right. Levels can be grouped and then expanded or minimized as needed depending on the level of detail you need to show in the report.
To customize the Sales by Item Summary report for Merchandise Hierarchy:

1. Navigate to Reports > Sales > Sales by Item > Customize Summary (administrator).
2. In the Report Builder on the Edit Columns page, edit the name to make it easy to identify in the Saved Reports list. For example, Sales by Item Summary – Merchandise Hierarchy.
3. Select the Item Type 1 row and clear the Group box.
4. (Optional) Select the Item Type column and click the Remove Column button.
5. Now you need to add the custom merchandise hierarchy fields to your report:

   **Important:** It is vital that you select the correct custom merchandise hierarchy fields in this step. Follow these instructions very carefully.

   a. Navigate to the correct custom merchandise hierarchy fields:
      i. In the Add Fields list on the left, expand the Item Type list.
      ii. Scroll down to the merchandise hierarchy internal custom fields. If you have prefixed the name of the hierarchy levels with [MH], it is easier to locate the internal custom fields in the list.

   b. Drag and drop the internal custom fields into the Report Preview panel.

6. After you have added all the required fields, you can reorder the columns as needed by clicking the Move buttons or by dragging the columns into position.

   **Tip:** In the Column Label field you can remove the [MH] prefix so that it does not appear in the report.

7. Select the columns that you want to be able to collapse and expand as needed in the report and check the Group With Previous Column box for each of them.
8. Add filters as required to your report. For information regarding how to add filters, see Adding Filters to Customized Merchandise Hierarchy Reports.

9. After you have added the required columns and filters, click Save.

Using Hierarchy Versions in Workbooks and Reports

If you use multiple merchandise hierarchy versions, each version contains a complete hierarchy definition for a specific time period. Although typically you only need one hierarchy version, a benefit of using multiple hierarchy versions is that you can update your merchandise hierarchy as required to reflect the items available at any time.

For example, an enterprise that sells fashion wear could have two product categories: Core, and Fashion. During the spring/summer, some items could be classified in the Core category, then during the fall/winter classified as Fashion. To preserve the historical classification of these items for workbooks and reporting, you can create a hierarchy version for the Spring/Summer period and another one for the Fall/Winter period.

Only one hierarchy version is active at any time. If you create multiple versions, the current version is the only active version, superseded versions are inactive but available for workbooks and reporting purposes. You can also have several versions scheduled for the future.

For more information, see the Creating a Hierarchy Version topic.

Workbooks and reports that incorporate multiple merchandise hierarchy version data use custom merchandise hierarchy fields that have been added to the transaction record rather than the item record. They are therefore, also known as transaction-based workbooks or reports.

**Important:** Only use transaction-based workbooks and reports when you have multiple versions and you need to preserve the historical classification of items in Purchase and Sales reports.

For all other merchandise hierarchy reports, see Creating Merchandise Hierarchy Reports.

Merchandise Hierarchy Transaction-Based Workbooks

You can create workbooks that include merchandise hierarchy historical version data using SuiteAnalytics Workbook.
To create a workbook that includes historical version data you must use custom fields from the Transaction Line record, rather than the Item record. This is the only difference when defining a workbook to show historical version data as opposed to current version data. You select the correct custom fields to use during the process for selecting the source data for your workbook.

For more information, see Add Attributes to the Source Data in Merchandise Hierarchy Workbooks.

Merchandise Hierarchy Transaction-Based Reports

You can create custom reports that include merchandise hierarchy historical version data using Report Builder. However, not all types of reports can display historical version data.

You can customize only the following types of standard NetSuite reports to display historical item classifications:

- **Purchase reports** – for example, Purchase by Item, Purchase by vendor, etc.
- **Sales reports** – for example, Sales by Item, Sales by Customer, etc.

**Locating Custom Merchandise Hierarchy Fields for Historical Reports Only**

Custom merchandise hierarchy fields are located in the Add Fields list in the Report Builder.

The type of report you want to customize determines the location of the internal custom fields you need to add.

**Note:** Do not use the internal custom fields described in this section when you have only one hierarchy version defined in your system. For more information, see Locating Custom Merchandise Hierarchy Fields for Reports.

To locate the internal custom fields needed to create historical merchandise hierarchy reports when you have multiple versions, refer to the following table:

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Report</th>
<th>Custom Merchandise Hierarchy Fields Location</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchases</td>
<td>Purchase by Vendor</td>
<td>Purchases</td>
<td>Select fields with the suffix (Custom Column)</td>
</tr>
<tr>
<td></td>
<td>Purchase by Item</td>
<td>Purchases</td>
<td>Select fields with the suffix (Custom Column)</td>
</tr>
<tr>
<td></td>
<td>Purchase Order History</td>
<td>Purchase Order Transactions</td>
<td>Select fields with the suffix (Custom Column)</td>
</tr>
<tr>
<td>Sales</td>
<td>Sales by Customer</td>
<td>Sales</td>
<td>Select fields with the suffix (Custom Column)</td>
</tr>
<tr>
<td></td>
<td>Sales by Item</td>
<td>Sales</td>
<td>Select fields with the suffix (Custom Column)</td>
</tr>
<tr>
<td></td>
<td>Sales by Sales Rep</td>
<td>Sales</td>
<td>Select fields with the suffix (Custom Column)</td>
</tr>
</tbody>
</table>
### Using Hierarchy Versions in Workbooks and Reports

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Report</th>
<th>Custom Merchandise Hierarchy Fields Location</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales by Sales Team</td>
<td>Sales Team Sales</td>
<td>Select fields with the suffix (Custom Column)</td>
<td></td>
</tr>
<tr>
<td>Sales by Partner</td>
<td>Sales</td>
<td>Select fields with the suffix (Custom Column)</td>
<td></td>
</tr>
<tr>
<td>Sales by Historical Team</td>
<td>Historical Revenue</td>
<td>Select fields with the suffix (Custom Column)</td>
<td></td>
</tr>
<tr>
<td>Sales by Historical Team</td>
<td>Sales</td>
<td>Select fields with the suffix (Custom Column)</td>
<td></td>
</tr>
<tr>
<td>(Transaction Date)</td>
<td>Sales</td>
<td>Select fields with the suffix (Custom Column)</td>
<td></td>
</tr>
<tr>
<td>Sales by Promotion</td>
<td>Sales</td>
<td>Select fields with the suffix (Custom Column)</td>
<td></td>
</tr>
<tr>
<td>New Customer Sales</td>
<td>Sales</td>
<td>Select fields with the suffix (Custom Column)</td>
<td></td>
</tr>
</tbody>
</table>

### Creating Saved Searches Based on a Merchandise Hierarchy

The Merchandise Hierarchy Node field can be utilized in saved searches to provide useful filtering capabilities.

Hierarchy node filters can be applied to the following:

- **Item saved searches** – See Using the Hierarchy Node Field in Item Saved Searches
- **Transaction saved searches** – See Using the Hierarchy Node Field in Transaction Saved Searches

For more information regarding saved searches, see the help topic Saved Searches.

### Using the Hierarchy Node Field in Item Saved Searches

Item saved searches are useful in NetSuite when you need to apply filters to lists of items, such as when you want to limit the eligibility of a promotion to a specific group of items. You can use a merchandise hierarchy node as a filter in such saved searches, creating a search that only lists items assigned to a specific node.
For example, you can create a saved search that lists all the items assigned to a node for women’s jackets. You can then create a promotion that can only be applied to the women’s jackets assigned to that node.

For more information on using saved searches in promotions, see Promotions.

**To create an item saved search based on a hierarchy node:**

1. Go to Lists > Search > Saved Searches > New (Administrator)
2. In the Search Type list click **Item**.
3. Enter a name for the search in the Search Title field.
4. In the Criteria subtab, on the Standard subtab, select **Hierarchy Node** in the Filter list.
5. In the Saved Item Search popup window select the hierarchy node or nodes that you want to filter on.
6. Click Set.
7. Click Preview to see the search results, or click Save to create the saved search.

Using the Hierarchy Node Field in Transaction Saved Searches

Transaction saved searches are useful in NetSuite when you want to examine transactions for specific items. You can use a merchandise hierarchy node as a filter in such saved searches, creating a search that only lists transactions involving items assigned to a specific node.
To create a transaction saved search based on a hierarchy node:

1. Go to Lists > Search > Saved Searches > New (Administrator)
2. In the Search Type list click **Transaction**.
3. Enter a name for the search in the Search Title field.
4. In the **Criteria** subtab, on the **Standard** subtab, select **Item Fields...** in the **Filter** list.
5. In the Saved Transaction Search popup window select the hierarchy level that contains the node or nodes that you want to filter on. If you have prefixed the name of the hierarchy levels with [MH] it is easier to locate them in the list.
6. Select the hierarchy node or nodes that you want to filter on.
7. Click **Set**.
8. Click **Preview** to see the search results, or click **Save** to create the saved search.
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
- Customer Specific Promotions
- Qualifying Item Quantity

⚠️ **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.
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.

![Diagram showing steps to automatically apply promotions](image)

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.
Promotions Overview

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.

Customer Specific Promotions

Customer Specific Promotions lets you create promotions destined for one or more customer categories, one or more customers, or a customer group. Customer groups can be either static or dynamic. If you use a dynamic customer group, you can choose to use a cached version of the results, or you can run the customer group every time the promotion is applied.

For more information, see Setting Customer Eligibility on SuitePromotions.

Qualifying Item Quantity

This feature lets you specify how many items a shopper needs to buy in order to be eligible for the discount provided by a SuitePromotion. You can choose if the discount is repeated when multiple qualifying items are bought, or if it is applied to an order one time only, regardless of how many qualifying items are bought. Furthermore, with Item and Item Fixed Price SuitePromotions, you can now apply the discount to each eligible item in the order, rather than just the cheapest or most expensive. Qualifying Item Quantity is available for all types of SuitePromotion.

Note: The following limitations exist on the usage of repeating the discount incrementally:
- You cannot repeat a discount incrementally and apply the discount to each item in the order on an Item type SuitePromotion
- You cannot repeat a discount incrementally and offer a percentage discount on an Order type SuitePromotion.
- You cannot repeat discounts incrementally on Shipping type SuitePromotions.

Qualifying Item Quantity is defined in the What the Customer Needs to Buy section of a SuitePromotion form.

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**.
Configuring Promotions

**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 Web Stores. For more information, see the help topic Commerce Product Overview.

**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 in one transaction 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.

**Note:** If a single-use coupon code is entered on a transaction and the transaction is then canceled, the coupon code is no longer valid and cannot be used again.

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.

![Coupon Codes Import Example](image)

**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.

![Coupon Codes Generation Example](image)

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:
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*.
Creating 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.

### New Promotion

<table>
<thead>
<tr>
<th>Promotion Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Item Promotion</strong></td>
<td>Discount on items. Example: 25% off any Item A; Buy One Get One (Bogo). Item A and get Item B at half price.</td>
</tr>
<tr>
<td><strong>Fixed Price Item Promotion</strong></td>
<td>Free item automatically added to cart. Example: Free gift item A automatically added to your cart, when you spend $20 or more.</td>
</tr>
<tr>
<td><strong>Order Promotion</strong></td>
<td>Discount on the Total Order Amount. Example: 20% off your order.</td>
</tr>
<tr>
<td><strong>Shipping Promotion</strong></td>
<td>Free Shipping. Example: Spend $100 or more and get free shipping.</td>
</tr>
<tr>
<td><strong>Free Gift Promotion</strong></td>
<td>Free item automatically added to cart. Example: Free gift item A automatically added to your cart, when you spend $20 or more.</td>
</tr>
</tbody>
</table>

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
Creating Promotions

- **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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Form</td>
<td>Select the promotion type. You can select one of the Suite promotion types (item, order, or shipping) or the Standard Promotion Code Form.</td>
</tr>
<tr>
<td>Name</td>
<td>Enter a name for the promotion.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the promotion.</td>
</tr>
<tr>
<td>Inactive</td>
<td>Check this box to make this promotion inactive but not deleted. The promotion will not be available for selection on a transaction.</td>
</tr>
</tbody>
</table>

### SuitePromotions Scheduling

In the scheduling section, you can set time frames for when the promotion is valid.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>Enter the date from when the promotion is valid.</td>
</tr>
<tr>
<td>End Date</td>
<td>Enter the date after which the promotion is no longer valid.</td>
</tr>
</tbody>
</table>

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
- if a promotion can be combined with other promotions, or is exclusive – globally or only in relation to a specific item, or promotion type

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combining Options</td>
<td></td>
</tr>
<tr>
<td>SuitePromotions</td>
<td>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.</td>
</tr>
<tr>
<td>Note: Free gift promotions cannot be made exclusive and are not considered in the Best Offer logic. For more information see Best Offer.</td>
<td></td>
</tr>
<tr>
<td>View the Combining SuitePromotions video</td>
<td></td>
</tr>
<tr>
<td>Combinable Promotion</td>
<td>Select this option to permit this promotion to be combined with other eligible promotions on a transaction when the SuitePromotions feature is enabled.</td>
</tr>
<tr>
<td>Exclusive Promotion</td>
<td>Select this option to prevent this promotion from being combined with other eligible promotions on a transaction when the SuitePromotions feature is enabled.</td>
</tr>
<tr>
<td>Item Line Exclusive Promotion</td>
<td>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.</td>
</tr>
<tr>
<td>Order Type Exclusive Promotion</td>
<td>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.</td>
</tr>
</tbody>
</table>
Creating Promotions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipping Type Exclusive Promotion</td>
<td>This option is available for only order type promotions. 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.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>This promotion can be automatically applied</td>
<td>Check this box to enable this promotion to be automatically applied to transactions when the SuitePromotions feature is enabled.</td>
</tr>
<tr>
<td>Discount Item for Accounting</td>
<td>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.</td>
</tr>
</tbody>
</table>

### 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.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buy Anything</td>
<td>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.</td>
</tr>
<tr>
<td>Spend a Minimum Order Amount or Buy Specific Items</td>
<td>Select this option if you want to specify Buy conditions. The Minimum Order Amount and Specific Items boxes will appear.</td>
</tr>
<tr>
<td>Minimum order Amount</td>
<td>Check this box if you want to specify a minimum order amount that must be spent before a transaction is eligible for the promotion.</td>
</tr>
<tr>
<td>Specific Items</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Free gift items added to the order by a free gift promotion are not taken into consideration for eligibility.</td>
</tr>
<tr>
<td>From Items List</td>
<td>Select an item or items from the Item list that must be bought before a transaction is eligible for the promotion.</td>
</tr>
<tr>
<td>From Saved Search</td>
<td>Select an item saved search from the From Saved Search list that must be bought before a transaction is eligible for the promotion.</td>
</tr>
<tr>
<td></td>
<td>Saved searches can be created to group specific items together. For example, all the dresses to be discounted in the Spring Sale.</td>
</tr>
<tr>
<td></td>
<td>For more information, see the help topic Saved Searches.</td>
</tr>
<tr>
<td></td>
<td>When you use an item saved search, the Saved Search Preferences subtab appears on the promotion record. For more information, see Saved Search Performance.</td>
</tr>
<tr>
<td>Item Quantity</td>
<td>Enter the quantity of items that the shopper needs to buy in order to be eligible for the discount.</td>
</tr>
<tr>
<td></td>
<td>For example, enter 2 to set up “Buy 2, Get 1” or “Buy 3 for the price of 2” promotions.</td>
</tr>
<tr>
<td>Repeat Discount Incrementally</td>
<td>Check this box to apply the discount to the order every time the customer buys the required item quantity.</td>
</tr>
<tr>
<td></td>
<td>This option is not available for Shipping type SuitePromotions.</td>
</tr>
<tr>
<td></td>
<td>Note, if this box is checked: you cannot apply the discount to each item in the order on an Item type SuitePromotion; you cannot offer a percentage discount on an Order type SuitePromotion. See What the Customer Will Get.</td>
</tr>
</tbody>
</table>

**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.
Creating Promotions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>Select this option to give the customer a percentage off the selected item or items.</td>
</tr>
<tr>
<td>Flat</td>
<td>Select this option to give the customer a flat rate discount off the selected item or items.</td>
</tr>
<tr>
<td>Discount Rate</td>
<td>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.</td>
</tr>
<tr>
<td>From Items List</td>
<td>Select an item or items from the Item list that the discount will be applied to.</td>
</tr>
<tr>
<td>From Saved Search</td>
<td>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.</td>
</tr>
<tr>
<td>Apply Discount To</td>
<td>Select from:</td>
</tr>
<tr>
<td>■ Each Discountable Item</td>
<td>– the discount is applied to each eligible item in the order. Note, you cannot select this option when the Repeat Discount Incrementally box is selected in the What the Customer Needs to Buy section. Such promotions may potentially apply 100% discount to each discountable item.</td>
</tr>
<tr>
<td>■ Cheapest Discountable Item</td>
<td>– the discount is applied to the cheapest eligible item in the order</td>
</tr>
<tr>
<td>■ Most Expensive Discountable Item</td>
<td>– the discount is applied to the most expensive eligible item in the order</td>
</tr>
</tbody>
</table>

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](#).
- **Apply Discount To** Select from:
  
  - **Each Discountable Item** – the discount is applied to each eligible item in the order. Note, you cannot select this option when the Repeat Discount Incrementally box is selected in the What the Customer Needs to Buy section. Such promotions may potentially apply 100% discount to each discountable item.
  
  - **Cheapest Discountable Item** – the discount is applied to the cheapest eligible item in the order
  
  - **Most Expensive Discountable Item** – the discount is applied to the most expensive eligible item in the order

### 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.
Creating Promotions

### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>Select this option to give the customer a percentage off the order. Note, this option is not available when the Repeat Discount Incrementally box is checked in the What the Customer Needs to Buy section.</td>
</tr>
<tr>
<td>Flat</td>
<td>Select this option to give the customer a flat rate discount off the order.</td>
</tr>
<tr>
<td>Discount Rate</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipping Method</td>
<td>Select a free shipping method from the list to be applied to eligible transactions.</td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Free Gift</td>
<td>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.</td>
</tr>
</tbody>
</table>
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 one or more of the following:
  - a target audience specified in a marketing campaign – see Setting SuitePromotion Eligibility With Marketing Campaigns.
  - a specific customer category – see Setting SuitePromotion Eligibility by Customer Category.
  - a specific customer – see Setting SuitePromotion Eligibility by Customer.
  - a specific customer group – see Setting SuitePromotion Eligibility by Customer Group.

You can use a combination of these criteria to set the target audience depending on your requirements.
Creating Promotions

Note: You cannot delete customer categories, customers, customer groups, locations, nor websites when you create a promotion that has eligibility criteria based on them.

For example, lets say you want to create a promotion that is limited to VIPs, but also customers located in Oklahoma City. You can create a customer category for VIPs, and a new customer group that uses a saved search to include all customers with an address in Oklahoma City. In the Promotion record, you choose Specific Customers, select the VIP customer category and also select the Oklahoma City Customers customer group. Only customers who belong to the VIP category or who have an address in Oklahoma City can apply the promotion to a transaction.

Setting SuitePromotion Eligibility With Marketing Campaigns

Promotions are limited to specific marketing campaigns by choosing the Specific Customer option. You set the customers that are targeted by the marketing campaign in the campaign event. For more information, see the help topic Scheduling Campaign Events.

For more information on how to use promotions in marketing campaigns, see Promotions and Marketing Campaigns.

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 specify the customers targeted in the Promotion record. The promotion is associated with the marketing campaign in the Campaign record and included in the marketing template.

Setting SuitePromotion Eligibility by Customer Category

You can target promotions at one or several customer categories. A customer category is used on customer records to categorize them. It is often used to indicate the source of the customer. You can only assign a customer to one customer category at a time in the Customer record.

For more information on how to set up a new customer category, see the help topic Setting Up Accounting Lists.
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.
2. On the Audience subtab, select the Specific Customers option.
3. Enter each customer category name in the Customer Category field.

Setting SuitePromotion Eligibility by Customer
You can target promotions at a single customer or a selection of customers.

To limit eligibility for a promotion to a specific customer:
1. On the Audience subtab, select the Specific Customers option.
2. Enter the name of each customer in the Customer field or select a range of customers.

Setting SuitePromotion Eligibility by Customer Group
You can target promotions at a specific customer group. There are two types of customer group:

- **Static** – membership of the group does not change. If you select a static customer group, only the customers included in the group are eligible for the promotion.
- **Dynamic** – membership of the group is determined by saved search criteria. If you select a dynamic customer group, before the promotion is applied to the transaction, the saved search for the customer group is run first to determine the customer’s membership.

**Note:** If you set up a promotion to use a customer group, the customer group cannot be deleted until it has been removed from the promotion.

For more information on creating groups, see the help topic Working with Groups.

To limit eligibility for a promotion to a specific customer group:
1. Make sure you have defined your customer group and checked that your customers are correctly assigned.
2. On the Audience subtab, select the Specific Customers option.
3. Select the customer group in the Customer Group field.

**Tip:** If you select a dynamic customer group you can choose when the saved search criteria for the group membership is refreshed on the Customer Group Preferences tab. For more information, see Customer Group Performance.

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.

**Note:** You cannot delete customer categories, customers, customer groups, locations, nor websites when you create a promotion that has eligibility criteria based on them.

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 **Work 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 set up SuiteCommerce. Only SuiteCommerce web stores are eligible for website-based promotion eligibility. For more information regarding creating a SuiteCommerce web store, see the help topic **Commerce Product Overview**.

**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 that has a multi-use coupon code. 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.
Creating Promotions

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buy Anything</td>
<td>Clear</td>
</tr>
<tr>
<td>Spend a minimum order amount or buy specific items</td>
<td>Select</td>
</tr>
<tr>
<td>Minimum Order Amount</td>
<td>–</td>
</tr>
<tr>
<td>Specific Items</td>
<td>Select</td>
</tr>
<tr>
<td>Item</td>
<td>T-shirt</td>
</tr>
<tr>
<td>Item Quantity</td>
<td>1</td>
</tr>
<tr>
<td>Repeat Discount Incrementally</td>
<td>Select</td>
</tr>
</tbody>
</table>

### What the customer will get

The following table shows how to set up the Get conditions for this type of promotion.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discount Type</td>
<td>%</td>
</tr>
<tr>
<td>Discount Rate</td>
<td>100.00</td>
</tr>
<tr>
<td>Items to be discounted</td>
<td>T-shirt</td>
</tr>
<tr>
<td>Apply discount to</td>
<td>Cheapest Discountable Item</td>
</tr>
</tbody>
</table>

### 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.

<table>
<thead>
<tr>
<th>What the customer buys</th>
<th>Price before discount</th>
<th>Discount</th>
<th>Price after discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 T-shirts</td>
<td>$10</td>
<td>–</td>
<td>$10</td>
</tr>
</tbody>
</table>
Creating Promotions

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.

For many more SuitePromotions examples, please see the SuitePromotions Examples document.
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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buy Anything</td>
<td>Select</td>
</tr>
<tr>
<td>Spend a minimum order amount or buy specific items</td>
<td>Clear</td>
</tr>
<tr>
<td>Minimum Order Amount</td>
<td>Clear</td>
</tr>
<tr>
<td>Specific Items</td>
<td>Clear</td>
</tr>
<tr>
<td>Item</td>
<td>–</td>
</tr>
<tr>
<td>Item Quantity</td>
<td>–</td>
</tr>
<tr>
<td>Repeat Discount Incrementally</td>
<td>Clear</td>
</tr>
</tbody>
</table>

**What the customer will get**

The following table shows how to set up the Get conditions for this type of promotion.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Price</td>
<td>8.00</td>
</tr>
<tr>
<td>Items to be discounted</td>
<td>T-shirt</td>
</tr>
<tr>
<td>Apply discount to</td>
<td>Each Discountable Item</td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>What the customer buys</th>
<th>Price before discount</th>
<th>Discount</th>
<th>Price after discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 T-shirt</td>
<td>$10</td>
<td>$2</td>
<td>$8</td>
</tr>
<tr>
<td>2 T-shirts</td>
<td>$20</td>
<td>$4 ($2 off each T-shirt)</td>
<td>$16</td>
</tr>
<tr>
<td>3 T-shirts</td>
<td>$30</td>
<td>$6 ($2 off each T-shirt)</td>
<td>$24</td>
</tr>
<tr>
<td>6 T-shirts</td>
<td>$60</td>
<td>$12 ($2 off each T-shirt)</td>
<td>$48</td>
</tr>
</tbody>
</table>
Creating Promotions

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.
Creating Promotions

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buy Anything</td>
<td>Clear</td>
</tr>
<tr>
<td>Spend a minimum order amount or buy specific items</td>
<td>Select</td>
</tr>
<tr>
<td>Minimum Order Amount</td>
<td>50.00</td>
</tr>
<tr>
<td>Specific Items</td>
<td>Clear</td>
</tr>
<tr>
<td>Item</td>
<td>–</td>
</tr>
</tbody>
</table>

**What the customer will get**

The following table shows how to set up the Get conditions for this type of promotion.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discount Type</td>
<td>Flat</td>
</tr>
<tr>
<td>Discount Rate</td>
<td>10.00</td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>What the customer buys</th>
<th>Price before discount</th>
<th>Discount</th>
<th>Price after discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 T-shirt, 1 dress</td>
<td>$30</td>
<td>–</td>
<td>$30</td>
</tr>
<tr>
<td>2 T-shirts, 1 dress</td>
<td>$40</td>
<td>–</td>
<td>$40</td>
</tr>
<tr>
<td>3 T-shirts, 1 dress</td>
<td>$50</td>
<td>$10</td>
<td>$40</td>
</tr>
<tr>
<td>6 T-shirts, 2 dresses</td>
<td>$100</td>
<td>$10</td>
<td>$90</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buy Anything</td>
<td>Clear</td>
</tr>
<tr>
<td>Spend a minimum order amount or buy specific items</td>
<td>Select</td>
</tr>
<tr>
<td>Minimum Order Amount</td>
<td>Clear</td>
</tr>
<tr>
<td>Specific Items</td>
<td>Select</td>
</tr>
<tr>
<td>Item</td>
<td>T-shirt</td>
</tr>
<tr>
<td>Item Quantity</td>
<td>1</td>
</tr>
</tbody>
</table>

What the customer will get

The following table shows how to set up the Get conditions for this type of promotion.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipping Method</td>
<td>Select any available shipping method from the list (the selected shipping method will be free for any eligible order).</td>
</tr>
</tbody>
</table>

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 Gift 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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buy Anything</td>
<td>Select</td>
</tr>
</tbody>
</table>
Creating Promotions

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spend a minimum order amount or buy specific items</td>
<td>Clear</td>
</tr>
</tbody>
</table>

**What the customer will get**

The following table shows how to set up the Get conditions for this type of promotion.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free Gift</td>
<td>T-shirt</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>What the customer buys</th>
<th>Price before discount</th>
<th>Free gifts</th>
<th>Price after discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 T-shirt</td>
<td>$10</td>
<td>1 T-shirt</td>
<td>$10 (the T-shirt in the order is not discounted, an extra T-shirt is added to the order)</td>
</tr>
<tr>
<td>1 dress</td>
<td>$20</td>
<td>1 T-shirt</td>
<td>$20</td>
</tr>
<tr>
<td>1 T-shirt, 1 dress</td>
<td>$30</td>
<td>1 T-shirt</td>
<td>$30 (the T-shirt in the order is not discounted, an extra T-shirt is added to the order)</td>
</tr>
<tr>
<td>2 T-shirts, 1 dress</td>
<td>$40</td>
<td>1 T-shirt</td>
<td>$40 (the T-shirts in the order are not discounted, an extra T-shirt is added to the order)</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Form</td>
<td>Select the promotion type. You can select one of the Suite promotion types (item, order, or shipping) or the Standard Promotion Code Form.</td>
</tr>
<tr>
<td>Name</td>
<td>Enter a name for the promotion.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Enter the date from when the promotion is valid.</td>
</tr>
<tr>
<td>End Date</td>
<td>Enter the date after which the promotion is no longer valid.</td>
</tr>
<tr>
<td>Discount Item for Accounting</td>
<td>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.</td>
</tr>
<tr>
<td>%</td>
<td>Select this option to give the customer a percentage off the order.</td>
</tr>
<tr>
<td>Flat</td>
<td>Select this option to give the customer a flat rate discount off the order.</td>
</tr>
<tr>
<td>Discount Rate</td>
<td>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.</td>
</tr>
<tr>
<td>Each Customer Can use the Promotion</td>
<td>Select how many times a customer can use this promotion. Select from:</td>
</tr>
<tr>
<td></td>
<td>■ One time only</td>
</tr>
<tr>
<td></td>
<td>■ Unlimited amount of times</td>
</tr>
<tr>
<td>Free Shipping Method</td>
<td>Select a shipping method here to create a free shipping promotion.</td>
</tr>
<tr>
<td>Minimum Order Amount</td>
<td>Enter the amount that the customer must spend before the promotion becomes valid.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the promotion.</td>
</tr>
<tr>
<td>Location</td>
<td>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.</td>
</tr>
<tr>
<td>Available to All Customers</td>
<td>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.</td>
</tr>
<tr>
<td>Inactive</td>
<td>Check this box to make this promotion inactive but not deleted. The promotion will not be available for selection on a transaction.</td>
</tr>
<tr>
<td>Display Line Discounts</td>
<td>Check this box if you want the following:</td>
</tr>
<tr>
<td></td>
<td>■ the discount for this promotion to show as a line item on transactions</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>■</td>
<td>to display strikethrough pricing in the shopping cart on web store orders</td>
</tr>
</tbody>
</table>

**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 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.
Creating Promotions

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.

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Order Amount</td>
<td>20.00</td>
</tr>
</tbody>
</table>

**What the customer will get**

The following table shows how to set up the Get conditions for this type of promotion.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discount Type</td>
<td>Flat</td>
</tr>
</tbody>
</table>
Creating Promotions

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discount Rate</td>
<td>5.00</td>
</tr>
<tr>
<td>On the Items subtab in the Items list</td>
<td>T-shirt</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>What the customer buys</th>
<th>Price before discount (Price after discount)</th>
<th>Discount</th>
<th>Price after discount (Price after discount)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 T-shirt</td>
<td>$10 (-) $10</td>
<td>-</td>
<td>$10 (-) $10</td>
</tr>
<tr>
<td>1 dress</td>
<td>$20 (-) $20</td>
<td>-</td>
<td>$20 (-) $20</td>
</tr>
<tr>
<td>1 T-shirt, 1 dress</td>
<td>$30 ($5 off the T-shirt) $25 (price total)</td>
<td>$5</td>
<td>$25 ($5 off each T-shirt) $25 (price total)</td>
</tr>
<tr>
<td>4 T-shirts, 1 dress</td>
<td>$60 ($20 off 5 each T-shirt) $40 (price total)</td>
<td>$20</td>
<td>$40 ($20 off each T-shirt) $40 (price total)</td>
</tr>
</tbody>
</table>

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:

1. **Select GET Conditions**
   - Select promotion type:
     - Item
     - Buy X, Get Y
     - Order
2. **Enter Primary Information**
3. **Create Coupon Code**
   - Codes Tab
4. **Select BUY Conditions**
   - Eligibility Tab
     - Customers
     - Order
     - Buy X
5. **Select GET Conditions**
   - Discount Tab
     - Item
     - Shipping
     - Get Y
     - Order
6. **Save**

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotion Name</td>
<td>Enter a name for the promotion.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the promotion.</td>
</tr>
<tr>
<td>Location</td>
<td>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.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Enter the date from when the promotion is valid.</td>
</tr>
<tr>
<td>End Date</td>
<td>Enter the date after which the promotion is no longer valid.</td>
</tr>
<tr>
<td>Discount Item</td>
<td>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.</td>
</tr>
<tr>
<td>Each Customer Can use the Promotion</td>
<td>Select how many times a customer can use this promotion. Select from:</td>
</tr>
<tr>
<td></td>
<td>- One time only</td>
</tr>
<tr>
<td></td>
<td>- Unlimited amount of times</td>
</tr>
<tr>
<td>Site</td>
<td>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.</td>
</tr>
<tr>
<td>Inactive</td>
<td>Check this box to make this promotion inactive but not deleted. The promotion will not be available for selection on a transaction.</td>
</tr>
</tbody>
</table>
Creating Promotions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set Fixed Price</td>
<td>Check this box to create a Fixed Price Advanced Promotion, see Creating Fixed Price Advanced Promotions.</td>
</tr>
<tr>
<td>Create Tiers</td>
<td>Check this box to create a Tiered promotion, see Creating Tiered Promotions.</td>
</tr>
</tbody>
</table>

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 set 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.
Creating Promotions

- **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.

6. If you are creating a tiered promotion, enter the criteria for each tier.

   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 or 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.

   ![Select Items](image)

   - 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.
Creating Promotions

- **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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>On the <strong>Eligibility</strong> tab click the <strong>Order</strong> subtab</td>
<td></td>
</tr>
<tr>
<td>Apply</td>
<td>If order matches any criterion</td>
</tr>
<tr>
<td>Add Order Criteria</td>
<td>Select Items</td>
</tr>
<tr>
<td>Item</td>
<td>T-shirt</td>
</tr>
<tr>
<td>Minimum Purchase</td>
<td>1 Unit</td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click the <strong>Discount</strong> subtab</td>
<td></td>
</tr>
<tr>
<td>Add Item Criteria</td>
<td>Select Items</td>
</tr>
<tr>
<td>Item</td>
<td>Dress</td>
</tr>
<tr>
<td>Exclude Items</td>
<td>-</td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>What the customer buys</th>
<th>Price before discount</th>
<th>Discount</th>
<th>Price after discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 T-shirt, 1 dress</td>
<td>$30</td>
<td>$5</td>
<td>$25</td>
</tr>
</tbody>
</table>
### 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).
Creating Promotions

To create a Buy X, Get Y promotion:

1. Go to Campaigns > Marketing > Promotions > New.
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!
Creating Promotions

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>On the <strong>Eligibility</strong> tab click the <strong>Buy X</strong> subtab</td>
<td>If order matches any criterion</td>
</tr>
<tr>
<td>Apply</td>
<td>Select Items</td>
</tr>
<tr>
<td>Add Buy X Criteria</td>
<td>T-shirt</td>
</tr>
<tr>
<td>Item</td>
<td>1 Unit</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click the <strong>Discount</strong> subtab</td>
<td>Select Items</td>
</tr>
<tr>
<td>Get Y Discount</td>
<td>T-shirt</td>
</tr>
<tr>
<td>Item</td>
<td></td>
</tr>
<tr>
<td>Exclude Items</td>
<td>-</td>
</tr>
<tr>
<td>Promotional Offer</td>
<td>100%</td>
</tr>
<tr>
<td>Limit</td>
<td>-</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>What the customer buys</th>
<th>Price before discount</th>
<th>Discount</th>
<th>Price after discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 T-shirt</td>
<td>$10</td>
<td>-</td>
<td>$10</td>
</tr>
<tr>
<td>2 T-shirts</td>
<td>$20</td>
<td>$10</td>
<td>$10</td>
</tr>
<tr>
<td>3 T-shirts</td>
<td>$30</td>
<td>$10</td>
<td>$20</td>
</tr>
<tr>
<td>6 T-shirts</td>
<td>$60</td>
<td>$30</td>
<td>$30</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order</td>
<td></td>
</tr>
</tbody>
</table>

On the **Eligibility** tab click the **Order** subtab.
Creating Promotions

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click the Discount subtab</td>
<td></td>
</tr>
<tr>
<td>Add Order Discount</td>
<td>New Order Discount</td>
</tr>
<tr>
<td>Promotional Offer</td>
<td>10%</td>
</tr>
<tr>
<td>Discount Up To</td>
<td>-</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>What the customer buys</th>
<th>Price before discount</th>
<th>Discount</th>
<th>Price after discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Dress</td>
<td>$20</td>
<td>-</td>
<td>$20</td>
</tr>
<tr>
<td>1 T-shirt, 1 dress</td>
<td>$30</td>
<td>$3</td>
<td>$27</td>
</tr>
<tr>
<td>2 T-shirts, 2 dresses</td>
<td>$60</td>
<td>$6</td>
<td>$54</td>
</tr>
<tr>
<td>3 T-shirts, 2 dresses</td>
<td>$70</td>
<td>$7</td>
<td>$63</td>
</tr>
</tbody>
</table>

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.
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.

   ! 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.

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.

![Promotion setup screenshot](image)

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:
Creating Promotions

■ 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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check the Set Fixed Price</td>
<td>box</td>
</tr>
<tr>
<td>On the Eligibility subtab</td>
<td>click the Order subtab</td>
</tr>
<tr>
<td>Apply</td>
<td>If order matches any criterion</td>
</tr>
<tr>
<td>Add Order Criteria</td>
<td>Select Items</td>
</tr>
<tr>
<td>Select Items</td>
<td>T-shirt</td>
</tr>
<tr>
<td>Minimum Purchase</td>
<td>5 Units</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click the Discount subtab</td>
<td></td>
</tr>
<tr>
<td>Add Item Discount</td>
<td>Select Items</td>
</tr>
<tr>
<td>Item</td>
<td>T-shirt</td>
</tr>
<tr>
<td>Exclude Items</td>
<td>-</td>
</tr>
<tr>
<td>Promotional Offer</td>
<td>7 USD</td>
</tr>
<tr>
<td>Limit</td>
<td>-</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>What the customer buys</th>
<th>Price before discount</th>
<th>Discount</th>
<th>Price after discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>4 T-shirts</td>
<td>$40</td>
<td>- (T-shirts are still $10 each)</td>
<td>$20</td>
</tr>
<tr>
<td>5 T-shirts</td>
<td>$50</td>
<td>$15 (T-shirts are now only $7 each = saving of $3 per T-shirt)</td>
<td>$27</td>
</tr>
<tr>
<td>6 T-shirts</td>
<td>$60</td>
<td>$18 (T-shirts are now only $7 each = saving of $3 per T-shirt)</td>
<td>$54</td>
</tr>
<tr>
<td>10 T-shirts</td>
<td>$100</td>
<td>$30 (T-shirts are now only $7 each = saving of $3 per T-shirt)</td>
<td>$70</td>
</tr>
</tbody>
</table>

Applying Promotions and Discounts to a Transaction

Promotions are applied to transactions in NetSuite on the Promotions subtab of a sales order. Note that a customer and at least one item must be added to a transaction before you can add a promotion.

The topics outlined in this section refer to applying promotions in NetSuite. You can also apply promotions to transactions:

- on a web store order in SuiteCommerce, see the help topic Promotions.
- at the point of sale in SCIS, see the help topic Promotions and Coupon Codes for SCIS.

To apply a promotion on 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. Click the Promotions subtab.
6. 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.
7. Click Add.

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.

How Promotion Discounts Are Applied to Transactions

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.
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 SuitePromotions to a Transaction

SuitePromotions provide the following added flexibility when applying promotions to a transaction:

- SuitePromotions can be stacked, so you can have more than one eligible promotion per transaction. For more information, see Applying Stackable Promotions.
- SuitePromotions can be manually or automatically applied. For more information, see Automatically Applying Promotions.
- 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.

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 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.

<table>
<thead>
<tr>
<th>Promotion</th>
<th>Automatically Applied?</th>
<th>Exclusive?</th>
<th>Value of Promotion</th>
<th>Applied?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotion 1</td>
<td>Yes</td>
<td>No</td>
<td>50</td>
<td>Yes</td>
</tr>
<tr>
<td>Promotion 2</td>
<td>Yes</td>
<td>Yes</td>
<td>10</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 3</td>
<td>Yes</td>
<td>No</td>
<td>100</td>
<td>Yes</td>
</tr>
<tr>
<td>Promotion 4</td>
<td>No</td>
<td>No</td>
<td>40</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 5</td>
<td>No</td>
<td>No</td>
<td>200</td>
<td>No</td>
</tr>
</tbody>
</table>

**Scenario 2:** Promotion 3 is now exclusive. Default behavior, promotions are automatically applied, but now the promotion with the best discount is exclusive.
Applying Promotions and Discounts to a Transaction

Result: The exclusive promotion with the highest discount to the customer (Promotion 3) is applied.

Total Discount: 100.

<table>
<thead>
<tr>
<th>Promotion</th>
<th>Automatically Applied?</th>
<th>Exclusive?</th>
<th>Value of Promotion</th>
<th>Applied?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotion 1</td>
<td>Yes</td>
<td>No</td>
<td>50</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 2</td>
<td>Yes</td>
<td>Yes</td>
<td>10</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 3</td>
<td>Yes</td>
<td>Yes</td>
<td>100</td>
<td>Yes</td>
</tr>
<tr>
<td>Promotion 4</td>
<td>No</td>
<td>No</td>
<td>40</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 5</td>
<td>No</td>
<td>No</td>
<td>200</td>
<td>No</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Promotion</th>
<th>Automatically Applied?</th>
<th>Exclusive?</th>
<th>Value of Promotion</th>
<th>Applied?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotion 1</td>
<td>Yes</td>
<td>No</td>
<td>50</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 2</td>
<td>Yes</td>
<td>Yes</td>
<td>10</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 3</td>
<td>Yes</td>
<td>Yes</td>
<td>100</td>
<td>Yes</td>
</tr>
<tr>
<td>Promotion 4</td>
<td>No</td>
<td>No</td>
<td>40</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 5</td>
<td>No</td>
<td>No</td>
<td>200</td>
<td>No</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Promotion</th>
<th>Automatically Applied?</th>
<th>Exclusive?</th>
<th>Value of Promotion</th>
<th>Applied?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotion 1</td>
<td>Yes</td>
<td>No</td>
<td>50</td>
<td>Yes</td>
</tr>
<tr>
<td>Promotion 2</td>
<td>Yes</td>
<td>Yes</td>
<td>10</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 3</td>
<td>Yes</td>
<td>Yes</td>
<td>100</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 4</td>
<td>No</td>
<td>No</td>
<td>40</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 5</td>
<td>No</td>
<td>No</td>
<td>200</td>
<td>Yes</td>
</tr>
</tbody>
</table>

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.
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.

**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.

**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.
Applying Promotions and Discounts to a Transaction

<table>
<thead>
<tr>
<th>Promotion</th>
<th>Automatically Applied?</th>
<th>Exclusive?</th>
<th>Value of Promotion</th>
<th>Applied?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotion 1</td>
<td>Yes</td>
<td>No</td>
<td>50</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 2</td>
<td>Yes</td>
<td>Yes</td>
<td>10</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 3</td>
<td>Yes</td>
<td>No</td>
<td>100</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 4</td>
<td>No</td>
<td>No</td>
<td>40</td>
<td>No</td>
</tr>
<tr>
<td>Promotion 5</td>
<td>No</td>
<td>Yes</td>
<td>200</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Viewing the Status of Applied Promotions

The Audit and Visibility Suite Promotions 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.
Applying Promotions and Discounts to a Transaction

The following promotion information is displayed in the Status Information window:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotion Name</td>
<td>The name of the promotion whose status is displayed</td>
</tr>
<tr>
<td>Status</td>
<td>Describes the current application status of the promotion regarding this transaction:</td>
</tr>
<tr>
<td></td>
<td>- Applied</td>
</tr>
<tr>
<td></td>
<td>- Not Applied</td>
</tr>
<tr>
<td>Mode</td>
<td>When a promotion is applied to this transaction, this field will show if it was initially applied automatically or manually.</td>
</tr>
<tr>
<td></td>
<td>Note this feature is currently not available.</td>
</tr>
<tr>
<td>Reason For Not Applying</td>
<td>If the promotion is not applied to this transaction, this field describes the reason why it has not been applied. Possible reasons are:</td>
</tr>
<tr>
<td></td>
<td>- Discarded by Best Offer – either this promotion is exclusive and the Best Offer logic has determined that one or more promotions offer</td>
</tr>
<tr>
<td></td>
<td>more discount to the customer, or another exclusive promotion offers more discount to the customer. For more information, see How Best</td>
</tr>
<tr>
<td></td>
<td>Offer is Applied.</td>
</tr>
<tr>
<td></td>
<td>- Discarded by the User – the user discarded the promotion from the transaction when prompted to choose between conflicting promotions (when</td>
</tr>
<tr>
<td></td>
<td>there is at least one exclusive promotion). For more information, see How Best Offer is Applied.</td>
</tr>
<tr>
<td></td>
<td>- Criteria Not Met – the transaction does not meet the eligibility criteria of this promotion. For example, the transaction is out of the</td>
</tr>
<tr>
<td></td>
<td>scheduled time frame for the promotion, or eligibility items have been removed from the transaction.</td>
</tr>
</tbody>
</table>

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.
Applying Promotions and Discounts to a 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.

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

Merchandising
Applying Promotions and Discounts to a Transaction

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.

Analyzing Promotions with SuiteAnalytics Workbooks

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
- Customer Group 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.

Customer Group Performance

When you use a dynamic customer group to define audience eligibility on SuitePromotions, the Customer Group Preferences subtab appears on the promotion record. Here you can configure how the customer group is handled when evaluating the promotion’s eligibility. The options provide you with a choice between better performance or more accurate results.

Dynamic customer groups are cached periodically to update membership. This also ensures the data is retrieved quickly every time a promotion that uses a dynamic customer group is evaluated on a transaction. However, if you have a dynamic customer group that frequently changes, it is possible that recent updates to this group are not taken into consideration when a promotion is evaluated.

For example, you may set up a customer group that determines group membership based on the State address field. When a new customer located in that state registers in your website, they are automatically added to the customer group. Since new users may register on your website at frequent intervals, it may be more effective to run the customer group each time a promotion is applied to ensure any new users can benefit from the promotion immediately. For example, if you create a promotion that offers new users 10% off their first order when they register.

You can select one of the following options for each promotion targeting dynamic customer groups:

- **Use cached customer group** – provides better performance as results are returned faster whenever the promotion is applied to a transaction. This is the default behavior.
- **Run customer group each time the promotion is applied** – uses the most up-to-date version of the customer group results possible, but the results are generated slower.

When a new promotion is created, the caching process automatically runs after the promotion is saved. The results of the customer group are cached again after 4 hours. For example, if a customer is added less than four hours after caching the customer group, the customer is not eligible for the promotion. You can manually trigger the caching process by clicking the **Update Now** link that appears under the Customer Group field on the Audience subtab.

**Note:** If you choose the run the customer group when the promotion is applied, you should test the promotion before making it available. If the customer group relies on a saved search with complex criteria, the promotion may take longer to run.

For more information, see Setting SuitePromotion Eligibility by Customer Group.

**To manage customer group performance on promotions targeting dynamic customer groups:**

1. On the **Audience** subtab, select the **Specific Customers** option.
2. Select the dynamic customer group in the **Customer Group** field.
3. Click the **Customer Group Preferences** subtab and choose the customer group option you require.

**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.

<table>
<thead>
<tr>
<th>Combination 1: total number of active promotions is 120</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unspecified Date Range</strong></td>
</tr>
<tr>
<td>Unspecified Location</td>
</tr>
<tr>
<td>Barcelona</td>
</tr>
<tr>
<td>New York</td>
</tr>
</tbody>
</table>

### 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

<table>
<thead>
<tr>
<th></th>
<th>Unspecified Date Range</th>
<th>October</th>
<th>November</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unspecified Location</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Barcelona</td>
<td>30</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>New York</td>
<td>30</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

### 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

<table>
<thead>
<tr>
<th></th>
<th>Unspecified Date Range</th>
<th>October</th>
<th>November</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unspecified Location</td>
<td>30</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Barcelona</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>New York</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

### Combination 4

Combination 4 shows that you can have various combinations of specific date ranges and locations.

### Combination 4

<table>
<thead>
<tr>
<th></th>
<th>Unspecified Date Range</th>
<th>October</th>
<th>November</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unspecified Location</td>
<td>0</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>Barcelona</td>
<td>10</td>
<td>15</td>
<td>20</td>
</tr>
</tbody>
</table>

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.
Searchandising

Searchandising augments the existing search techniques with additional features to create an enhanced and profitable product search experience. With Searchandising features, you can entice shoppers to purchase certain products and move merchandise.

The Search Synonyms feature lets you define synonyms in NetSuite to ensure that when a shopper searches for a specific word, the search results also include synonyms for that word. For example, you define trousers and pants as synonyms. Any shopper searching for the term pants now gets search results for pants and trousers. The Search Synonyms feature is available to all SuiteCommerce and SuiteCommerce Advanced customers. For more information, see Search Synonyms.

With the Commerce Search Analytics feature, you can view standard reports showing the top search queries your shoppers used to find products on your website. Because they reveal the exact search queries that your shoppers use, these reports provide valuable insight into the shoppers that visit your website. For more information, see Search Analytics.

Search Synonyms

Applies to: SuiteCommerce Web Stores

Watch a related video.

The Synonyms feature lets you define variants of terms in your product catalog. With synonyms, shoppers can use familiar search terms and receive expanded results. A search for a term, also searches for that term's synonyms. Therefore, synonyms eliminate the need for you to try and include all terms and their possible variants in item records.

For example, the shopper searches for pants. However, trousers is more commonly used in your catalog. For pants to yield any results, you could add it as a keyword for every relevant item, but that is a time-consuming task. With Synonyms, you make one entry to define pants as a synonym for trousers. When visitors search for pants the search results returns pants and trousers.

Note: When you define search synonyms, make sure the terms are included in fields you configured as search fields with a Keyword match type. This is necessary because only indexed search fields are included in the search.

For example, consider you define purple, magenta, violet, and lavender as synonyms so shoppers can find the nearest shade of the item. You can use the defined search synonym only if the product color is specified in the Product Description field, and you configured the Product Description field as a search field with a Keyword match type.

Types of Search Synonyms

You can define two types of search synonyms in NetSuite:

- Group Synonym — A group synonym is a collection of synonyms that produce the same search results for all the terms defined in the group.
  
  For example, if sneakers, trainers, and shoes are defined as group synonyms (sneakers, trainers, running shoes), searching for any one of these terms triggers a search for all its synonyms.
One-way Synonym — A one-way synonym works in one direction to produce search results. For example, if candy is a one-way synonym to sweets (sweets → candy), searching for sweets triggers a search for its one-way synonym candy. However, searching for candy does not trigger a search for sweets. If you want the other way around to work too, you need to define sweets and candy as group synonyms.

Define Search Synonyms in NetSuite

To define a group synonym:

1. Go to Setup > SuiteCommerce Advanced > Group Synonyms.
3. On the Group Synonym page, enter a comma-separated list of synonymous terms in the Synonyms box.

   Note: For example, you can enter handbag, purse, shoulder bag in the Synonyms box.

4. If you use multiple websites, select the site from the list for which this group synonym should be applied.
5. If your site uses multiple languages, select the language from the list for which this group synonym should be applied.
6. (Optional) If you do not want to enable the group synonym, check the Inactive box.
7. (Optional) If you want to add more group synonyms, click Save & New and repeat Steps 3–7.
8. Click Save.

To define a one-way synonym:

1. Go to Setup > SuiteCommerce Advanced > One-way Synonyms.
2. On the One-way Synonyms page, click New One-way Synonym.
3. On the One-way Synonym page, enter the search term in the Searching For box.

   Note: The term you specify here should be the search term your shopper might search for but does not find relevant results. For example, you can enter pants in the Searching For box.

4. In the Shows These Synonyms In Results box, enter one or more synonyms separated by a comma.

   Note: The terms you specify here should be the synonymous terms you widely use in your catalog for the same product. For example, you can enter jeans and trousers in the Shows these synonyms in Results box.

5. If you use multiple websites, select the site from the list for which this one-way synonym should be applied.
6. If your site uses multiple languages, select the language from the list for which this one-way synonym should be applied.
7. (Optional) If you do not want to enable the one-way synonym, check the Inactive box.
8. (Optional) If you want to add more one-way synonyms, click Save & New and repeat Steps 3–7.
9. Click **Save**.

**Note:** When you click **Save**, your search index automatically rebuilds to reflect these changes. When the search index is rebuilt successfully with these changes, the Search Index Job Status page displays **Synonyms Updated** under the Job Name column.

After you define search synonyms, you can view and edit the synonyms on the One-way Synonyms/Group Synonyms page. These pages display the defined synonyms and their status. If there are too many entries on the page, you can filter out the synonyms you are looking for by specifying the Search Term and Synonyms, Site, Language, Last Modified Date, and Status in the respective fields.

**To view, edit, or delete a defined synonym:**

2. You can view the defined synonyms on the One-way Synonyms/Group Synonyms page.
3. (Optional) To filter the list of defined synonyms:
   1. Expand **Filters**.
   2. Use the following fields to filter the list of defined synonyms:
      - Search Term and Synonyms
      - Site
      - Language
      - Last Modified Date
      - Status
4. (Optional) To edit a synonym definition, click **Edit** next to the synonym record.

**Note:** To edit multiple search synonym records, use the Edit toggle button.

5. (Optional) To delete a defined synonym, click **Edit** next to the synonym record and then click **Delete** under the Actions menu.

**Note:** To delete multiple search synonym records, use the Edit toggle button and then click **Delete Record** under the New column.

**Best Practices for Defining Search Synonyms**

The following list contains best practices for defining Search Synonyms:

- If Google Analytics is enabled in your account, you can see analysis of the search terms used by your shoppers. You can then identify frequently used terms that return no results. You can use this data to include synonyms for unproductive search terms that should return related products from your catalog.
- Test a few synonyms on Sandbox or a Test Site to see how the addition of search synonyms affects the relevance of your search results.
- Synonyms applies for your entire product catalog. Therefore, define fewer synonyms that return relevant results rather than an exhaustive list of possible synonyms.
- If you use multiple websites or multiple languages, create multiple sets of synonyms to address the relevant customer base. For example, since different terms are used to describe the same item in American and British English, you can define such terms as synonyms for your US and UK websites.
Search Analytics

Applies to: SuiteCommerce Web Stores

The key to the success of your website is to understand your shoppers. The Commerce Search Analytics reports provide valuable insight into the shoppers that visit your website. The reports not just reveal the search queries that the shoppers use to find products on your website, but also the language that they use to describe it. Based on these reports, you can make changes to the product naming convention or use the Search Synonyms feature to define variants of terms in your product catalog. For more information on the Synonyms feature, see Search Synonyms.

After you have identified the popular search queries from these reports, you can apply promotions for the most searched products to entice shoppers to purchase them. You can also consider positioning your popular related products on your home page.

The reports also help you identify the popular searches that did not return any search result on your website. If such products are missing in your website, you can consider increasing your existing catalog with new products or update the product descriptions of related products to include the right keywords.

Enabling Search Analytics in Your NetSuite Account

The Search Analytics feature is available to all SuiteCommerce and SuiteCommerce Advanced customers. By default, the Search Analytics feature is disabled in all NetSuite accounts. You can enable the Search Analytics feature at Setup > Company > Enable Features on the Web Presence subtab.

Note: Before enabling the Search Analytics feature, ensure that the SuiteAnalytics Workbook feature is enabled. By default, the SuiteAnalytics Workbook feature is enabled in all NetSuite accounts. If you do not see the Analytics tab in the NetSuite navigation menu, enable the feature as described in Enabling SuiteAnalytics Workbook in Your NetSuite Account.

To enable the Search Analytics feature:

1. Go to Setup > Company > Enable Features, and click the Web Presence subtab.
2. Under Web Site check the Commerce Search Analytics box.
3. Click Save.

When the Commerce Search Analytics feature is enabled, the Commerce Search Activity Data records are created with aggregated search activity data. If the feature is disabled, existing records remain in the database but new aggregations will not occur until the feature is enabled again.

Using Search Analytics to Analyze Top Search Queries

With Search Analytics, every search performed by a shopper in the web store is logged in the backend. When you enable the Search Analytics feature, a periodic task scheduler runs a scheduled task to aggregate the logged data into a NetSuite record: Commerce Search Activity Data. The aggregated search activity data is then organized in SuiteAnalytics workbooks. SuiteAnalytics Workbook is an analytical tool available in NetSuite. For more information on SuiteAnalytics Workbook, see the help topic SuiteAnalytics Workbook Overview.
Note: There is a 48-hour delay from the time the search activity data is logged to the time search activity data is aggregated. Therefore, the latest data that you view in the workbook is from two days ago.

Commerce Search Analytics uses the SuiteAnalytics Workbook feature to generate two standard workbooks:

- Commerce Search Activity: Top Searches Workbook
- Commerce Search Activity: Top Searches with No Results Workbook

The main purpose of these workbooks is to allow a Merchandiser to get to the important search analytics data within a few clicks. Consider this search analytics data as a starting point for building advanced data visualizations. For information on creating visualizations from your search analytics data, see the help topic Workbook Charts.

Important: By default, only users with the Analytics Administrator permission can access the Commerce Search Activity: Top Searches and Commerce Search Activity: Top Searches with No Results workbooks. If you do not have the Analytics Administrator permission, you can only access the workbooks if another user with the Analytics Administrator permission shares them with you. For more information, see the help topic Sharing Workbooks. To access the workbooks, click the Commerce Search Activity: Top Searches or Commerce Search Activity: Top Searches with No Results link in the Standard Workbooks list on the Workbook Listing Page. For more information about the Analytics Administrator permission, see the help topic Analytics Administrator Permission.

Commerce Search Activity: Top Searches Workbook

This workbook displays the top search queries your shoppers used to find products on your website. You can not only find the popular products that shoppers search for on your website, but also analyze the language and the terminologies that your shoppers use to describe the products.

After identifying the popular search queries, Merchandisers can take these actions to entice shoppers to purchase the products:

- Apply promotions to the most searched products
- Position popular related products on the home page
- Boost popular products higher in the Search Results

After you have identified the popular search queries from these reports, you can apply promotions for the most searched products to entice shoppers to purchase them. You can also consider positioning your popular related products on your home page.

From within the workbook you can view pivot tables that sort Search Queries by Number of Searches in descending order. For each site configured in your account, a pivot table is created by default. To access the workbook, click the Commerce Search Activity: Top Searches link from the Standard Workbooks list on the Workbook Listing Page. Click any Site name tab and then click the refresh icon to load the data for that website.

Workbook Configuration

The source data used in the Commerce Search Activity: Top Searches workbook combines fields from two record types and multiple criteria filters. Depending on the number of sites configured in your account, the workbook also includes predefined pivot tables for each of the site. You can edit each of...
these components on the corresponding tab of the workbook user interface. For more information, see Defining Workbook Source Data.

<table>
<thead>
<tr>
<th>Root Record</th>
<th>Joined Record(s)</th>
<th>Custom Formula Field(s)</th>
<th>Data Grid</th>
<th>Criteria Filters</th>
<th>Pivot Tables and Charts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commerce Search Activity Data</td>
<td>Web Site</td>
<td>Not Applicable</td>
<td>The following record fields are included in the workbook source data:</td>
<td>The following criteria is used to filter the workbook source data:</td>
<td>For each site configured in your NetSuite account, a pivot table is created by default. Therefore, the number of pivot tables predefined in the Top Searches workbook is directly proportional to the number of sites configured in the account.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Web Site</td>
<td>- Metric is Search Query</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Search Query</td>
<td>- Start Time is 2 days ago</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Date</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>- Time Period</td>
<td></td>
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<td></td>
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<td></td>
<td>- Position</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Number of Searches</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: The name of the pivot table is same as the name of the site configured in your account.

Commerce Search Activity: Top Searches with No Results Workbook

This workbook displays the top search queries your shoppers used to find products on your website that returned zero results. You can not only discover the products that shoppers could not find on your website, but also analyze the language and the terminologies that your shoppers use to describe the products.

From within the workbook you can view pivot tables that sort Search Queries with No Results by Number of Searches in descending order. For each site configured in your account, a pivot table is created by default. To access the workbook, click the Commerce Search Activity: Top Searches No Results link from the Standard Workbooks list on the Workbook Listing Page. Click any Site name tab and then click the refresh icon to load the data for that website.

Workbook Configuration

The source data used in the Commerce Search Activity: Top Searches No Results workbook combines fields from two record types and multiple criteria filters. Depending on the number of sites configured in your account, the workbook also includes predefined pivot tables for each of the site. You can edit each of these components on the corresponding tab of the workbook user interface. For more information, see Defining Workbook Source Data.

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<td></td>
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<td>workbook source data:</td>
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<tr>
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<td></td>
<td></td>
<td>- Web Site</td>
<td>- Metric is Search Query</td>
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<tr>
<td></td>
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<td>- Search Query</td>
<td>- Start Time is 2 days ago</td>
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<td></td>
<td></td>
<td></td>
<td>- Date</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>- Time Period</td>
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<td></td>
<td></td>
<td></td>
<td>- Number of Searches</td>
<td></td>
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</tr>
</tbody>
</table>
Customize your Workbook

In the Commerce Search Activity standard workbooks, a pivot table exists for each site configured in your NetSuite account. The timeline criteria used to filter the workbook source data is the same in each of these pivot tables, which is Start Time is 2 days ago. You can change the timeline to a wider date range as described here.

To change the criteria filter to retrieve data for the last one month:

1. Click the Commerce Search Activity: Top Searches link from the Standard Workbooks list on the Workbook Listing Page.
2. Go to the Datasets tab.
3. Click Criteria Summary where the Metric is set to Search Query and Start Time is set to 1 day ago.
4. In the Filter: Start Time dialog box, set Days to on or after 1 month ago.
5. Click OK.
6. Click any Site name tab and then click the refresh icon.
   The top searches for that website in the last one month is displayed.