Marketing Automation
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Marketing

- Marketing Automation Overview
- Capturing Leads
- Campaign Overview
- Email Marketing Campaigns
- Paid Search Marketing
- Upsell Manager
- Marketing Reports
- Promotional URLs
- Setting Up Marketing
- Customer Surveys

For more information about promotions, including SuitePromotions, see the Promotions help topic.
Marketing Automation Overview

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

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

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

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

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

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

**Lead Capture**

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

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

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

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

For example, the Wolfe Electronics marketing manager creates an online lead form that has fields for Company Name, Email Address, and State. The manager sets the Email Address field to search for matching records. If the email address entered matches the email address on an existing record, the existing record is updated instead of a new record being created.
Each lead is assigned a lead source that indicates which campaign generated the lead. Maintaining this lead source information enables you to tie revenue to campaigns and to use lead source analysis to see which campaigns are producing the most leads.

For more information on lead generation, see Capturing Leads.

Running Campaigns

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

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

Email Campaigns

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

Paid Keywords

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

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

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

Upselling

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

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

For more information, see Upsell Manager.

Campaign Analysis

NetSuite includes a full set of standard marketing reports, such as the Campaign ROI and Campaign Response reports. You can customize reports to meet the needs of your business. For example, you can add columns of data or display a report as a bar graph or pie chart.
Key performance indicators (KPIs) provide an immediate updates on your campaigns when you first log in to your NetSuite account. You can view your data in real time as orders are received or as campaign email is viewed.

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

For more information, see the help topic Marketing Reports.
Capturing Leads

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

Lead Sources

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

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

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

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

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

Creating Online Customer Forms

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

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

2. Click Default Form Template.
3. Enter a title and message on the form.
4. On the Select Fields subtab, select a field you want to appear on the form.

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

   Including **Company Name**, **First Name** and **Last Name** fields lets you capture information on both individual and companies.

5. Click Add.
6. Repeat these steps for each field you want to appear on the form.
7. Click Save.
Now, you can link to this form from your website or place it in a marketing email message.

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

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

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

### Passing Parameters Through URLs

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

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

Wolfe Electronics advertises through banner ads on the internet. Each ad links to an online customer form from their websites. The marketing manager wants to track which ad campaign sends each lead to the form.

The campaign ID for each ad is passed through the link to the online form. When the lead submits Wolfe Electronics' lead capture form, the campaign is automatically selected on the lead record that is created.

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

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

```
https://system.netsuite.com/app/site/crm/externalleadpage.nl?compid=ACCT000000&formid=1&h=1bdc80a058&leadsource=JoinNowAd
```

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

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Parameter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign Event</td>
<td>&amp;campaignevent=187</td>
</tr>
</tbody>
</table>
Passing Parameters Through URLs

<table>
<thead>
<tr>
<th>Field</th>
<th>Parameter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name</td>
<td>&amp;companyname=Global%20Distributing,%20Inc.</td>
</tr>
<tr>
<td>City</td>
<td>&amp;city=New%20York</td>
</tr>
<tr>
<td>Country</td>
<td>&amp;country=USA</td>
</tr>
<tr>
<td>Custom Form</td>
<td>&amp;customform=New%20Lead%20Form</td>
</tr>
<tr>
<td>E-mail</td>
<td>&amp;email=<a href="mailto:john@email.com">john@email.com</a></td>
</tr>
<tr>
<td>Lead Source</td>
<td>&amp;leadsource=Spring%20Ad%20Campaign</td>
</tr>
<tr>
<td>Login Password</td>
<td>&amp;password=password</td>
</tr>
<tr>
<td>Partner**</td>
<td>&amp;partner=Universal%20Consulting</td>
</tr>
<tr>
<td>Partner Code**</td>
<td>&amp;partner=1111</td>
</tr>
<tr>
<td>Phone Number</td>
<td>&amp;phone=555-555-5554</td>
</tr>
<tr>
<td>Promotion</td>
<td>&amp;promocode=Feb%20Flyer</td>
</tr>
<tr>
<td>State</td>
<td>&amp;state=New%20York</td>
</tr>
<tr>
<td>Zip/Postal Code</td>
<td>&amp;zip=54321</td>
</tr>
</tbody>
</table>

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

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>Info</th>
<th>Parameter</th>
</tr>
</thead>
<tbody>
<tr>
<td>name</td>
<td>(name)</td>
</tr>
<tr>
<td>login email address</td>
<td>(email)</td>
</tr>
<tr>
<td>first name</td>
<td>(firstname)</td>
</tr>
<tr>
<td>last name</td>
<td>(lastname)</td>
</tr>
<tr>
<td>internal ID</td>
<td>(user)</td>
</tr>
<tr>
<td>internal ID of user's role</td>
<td>(role)</td>
</tr>
</tbody>
</table>
Custom Field Parameters

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

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

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

https://system.netsuite.com/app/site/crm/externalleadpage.nl?
compid=ACCT00000000&formid=1&h=1bdc80a058&custentity1=industryperiodical

Custom check box fields follow the following format:

https://system.netsuite.com/app/site/crm/externalleadpage.nl?compid=ACCT00000000&formid=1&h=1bdc80a058 &custentity2=T

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

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

Passing Parameters from Third Party Sites

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

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

```javascript
<script type="text/javascript">
<!--
function getNS_url_param( name ){ 
  name = name.replace(/\[/\]/g,\"[\]\]).replace(/\[/\]/g,\"\]\"); 
  var regexS = '[\\?&]+name=([^\\&]+)'; 
  var regex = new RegExp( regexS ); 
  var results = regex.exec( window.location.href ); 
  if( results == null ) 
    return ''; 
  else 
    return results[1]; 
} 

function trackNSParams() { 
  var name = 'leadsource'; 
  var value = getNS_url_param(name); 
  if (value != null && value.length > 0) 
    document.cookie = name + '=' + value + '; path=/'; 
}

function appendNSParams(url) { 
  var nameEQ = 'leadsource='; 
  var ca = document.cookie.split('!'); 
```
Then apply the following format to any links to online forms from your site (for example, Contact Us links):

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

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

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

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

**Tips for Passing Parameters Through URLs**

Consider the following tips for using parameters correctly in links:

- **The leadsource parameter** is used to pass the campaign ID into an online customer form. The campaign ID in the URL fills the Lead Source field on the online form.

- To pass a partner code through a URL, use the partner parameter. Partner codes can let you keep the partner-customer relationship transparent to the customer by keeping the partner's name from appearing in the URL.

- For check box fields, enter T as the value if you want the box checked, and enter F if you want the box clear. For example, a link that passes a parameter to a check box field would look like this:

  ```
  https://system.netsuite.com/app/site/crm/externalleadpage.nl ?compid=ACCT000000&formid=1&h=1bdc80a058&unsubscribe=T
  ```

- Campaign IDs, partner names, and partner codes passed in the parameter must be spelled and capitalized exactly as the information on the respective record.

- You can add as many parameters as you want to pass through to your online customer form. A link with multiple parameters should follow this format:

  ```
  https://system.netsuite.com/app/site/crm/externalleadpage.nl ?compid=ACCT000000&formid=1&h=1bdc80a058?partner=Wilson%20Computers%20leadsource=March%202020%20Flyer
  ```

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

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

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

Tracking Lead Sources for Web Store Visitors

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

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

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

Note: In most cases, the link to your website has only the single parameter. The proper format for such a URL is


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

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

Lead Reports and Analysis

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

Online Form Statistics

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

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

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

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

Lead Source Reports

There are two sets of standard reports you can use to analyze how leads are coming into your company.
The Lead Source Analysis Summary Report list each lead source and the number of leads, prospects, and customers associated with it.

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

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

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

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

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

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

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

Campaign Categories

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

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

The following categories and subcategories are included by default:

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

To create a campaign category:

1. Go to Setup > Sales & Marketing Automation > Campaign Management > Categories > New.
2. Enter a name for the category.
3. If this is a subcategory, choose a parent category.
4. Select a default lead source for this category.
   When a customer selects a campaign category on an online customer form, this lead source is
   selected in the Lead Source field on the record created if no other lead source is associated with
   this customer.
5. Check the Available Externally box if you want this campaign category available for customers
   to select on online forms.
6. Click Save.

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

Creating a Campaign Record

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

To create a marketing campaign:
1. Go to Campaigns > Marketing > Campaigns > New.
2. Under Primary Information:
   1. Enter an ID for this campaign in one of the following ways:
      - If you use auto-generated numbers for campaigns, an ID is generated automatically.
      - If you do not use auto-generated numbers for campaigns, enter an ID.
      Campaign IDs can be used to identify campaigns, especially in the event that campaigns
      share similar names.
   2. Enter a title for this campaign.
   3. Select the category this campaign belongs in.
   4. Select a campaign manager for this campaign.
      The campaign manager receives confirmation that email campaign events have been
      sent.
   5. Enter or pick the start date and end date for this campaign.
   6. In the Base Cost field, enter the cost of this campaign apart from the cost of any specific
      campaign events.
      You can enter the cost of specific events on the Events subtab.
      The Total Cost field shows the sum of the cost of any campaign events and the base cost.
   7. In the Expected Revenue field, enter the amount of revenue you expect this campaign to
      generate.
   8. Enter the URL for the campaign landing page or online customer form associated with
      this campaign.
   9. Enter a description.
3. Under Related Information:
   1. In the Vertical field, select a marketing vertical related to this campaign.
Creating a Campaign Record

For more information, see the help topic Campaign Verticals.

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

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

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

3. Select the items associated with this marketing campaign.

4. If you want to associate an offer with this campaign event, select that offer.

5. In the Audience Description field, select an audience for this campaign.

For more information, see the help topic Campaign Audiences.

4. Click Save.

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

Scheduling Campaign Events

Campaign events represent individual aspects of this campaign.

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

**To schedule a campaign event:**

1. On the campaign record, click the Events subtab.
2. On the Events subtab, click the subtab for the campaign channel used for this event.
3. In the Target Group column, select the group that receives this campaign event.
4. If you are creating an email or direct mail campaign event, select the template for the email or direct mailing in the Template column.
   
   If you use the CRM Template Categories feature, you can select a category in the Template Category column to filter the list of templates.
5. Enter a title for this campaign event.
6. In the Subscription column, the subscription category for the template you are using is chosen by default. Only recipients that have this subscription receive this campaign event. For more information, see Campaign Subscription Categories.
   
   You can select a different subscription than the default for this template.
7. In the Channel column, choose the method used to deliver this event.
8. Enter the cost incurred by this campaign event.
   
   Entering a cost lets you track return on investment (ROI) for the campaign. The Total Cost field at the top of the page shows the sum of the base cost plus the cost of each campaign event.
9. In the Status column, select the status of the campaign event.
   
   If you select Execute for an email campaign event, NetSuite will send your email on the date and time you set.
9. Select the date and time this campaign event will occur.

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

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

11. Click Add.

12. Repeat these steps for other campaign events you want to schedule within this campaign.

### Campaign Events

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

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

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

### Campaign Channels

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

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

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

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

- **Not Started** – This status is used for events that are in the earliest stage.
- **Planning** – This status indicates that the event is being prepared or delivered, but it is not complete.
- **Execute** – This status is used for email campaign events.
  
  Setting an email campaign event to **Execute** tells NetSuite to send the email on the date and time you have selected.
- **Sent** – This status indicates that a campaign event has been completed and delivered to the recipients.
  
  NetSuite automatically sets email campaign events to **Sent** after the system generates and sends the email.
- **Failed** – This status indicates that a campaign event was not able to be sent by NetSuite. The most common reason for a failed campaign is exceeding your monthly email allotment.
  
  This status is not used for campaign email events that are successfully sent but cannot be delivered due to external issues like invalid email addresses or problems with the recipient’s email server. If an event fails, you must create a new event and send it again.

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

Initiating Campaign Events

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

**To set an event to execute:**

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

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

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

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

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

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

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

Tracking Campaign Revenue

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

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

You can choose from the following:

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

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

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

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

Cost and ROI

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

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

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

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

Tracking Campaign Responses

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

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

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

You can also track the following responses to email campaigns:

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

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

![Standard Summary](image)

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

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

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

### Entering Campaign Responses

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

**To enter a new campaign response:**

1. Open the recipient's record.
2. Click the **Marketing** subtab.
3. Click the **Campaigns** subtab.
4. Click **Add Response**.
5. In the New Campaign Response popup window, select the campaign the recipient responded to.
6. Select the campaign event the recipient responded to.
7. Enter the date and time of the response.
8. In the New Response Detail field, select the response type.
9. Enter any notes related to the response.
10. Click Save.

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

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

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

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

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

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

**Email with Multiple Links**

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

**Bounced Email**

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

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

As of 2017.1, two enhancements assist administrators in working with bounced emails:
A new saved search, Undelivered Emails, accessed from Lists > Mailing > Undelivered Emails.
For more information, see Managing Bounced Email.
- The Bounced Email Addresses list is more inclusive. For more information, see Viewing the Bounced Email Address List.

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

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

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

**Mail Merge vs. Email Campaigns**

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

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

**Creating Target Groups for Campaigns**

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

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

**To create a customer group:**

1. Go to Campaigns > Marketing > Groups > New.
2. On the Create Group page, choose Dynamic, and select Customer in the list.

3. Click Continue.

4. On the Create Dynamic Customer Group page, enter a name for your group.

5. Next to the Saved Search field, click New.

6. In the New Saved Search popup window, select what you want to base your customer group on.
   You can base a customer group on searches for transaction and case criteria in addition to customer criteria.

7. Enter the criteria customers must meet to be included in this group.

8. Click Save.


10. Check the Private box, if you want to be the only one to use this group.

11. In the Restrict To field, select the employee group you want to have access to this group.
    For example, you can select a group of marketing reps in this field to make this group only available to those reps.

12. Click Save.

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

Marketing to Contacts

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

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

Wolfe Electronics is sending email messages to let customers know about a summer sales promotion. Rather than sending the email to the customer's company email address, the Wolfe marketing manager sends it to their primary customer contacts. This email includes a coupon code that is to be used when placing an order.

Wolfe marketing manager creates a new customer search by filtering out customers that have not purchased within the last year. Then, they create a group made up of the primary contacts for these customers.
You can track lead sources for contacts as you do for leads, prospects, and customers. There is no transaction or revenue impact of a contact's lead source, however, contact lead sources can help you understand which marketing campaigns are most effective at bringing contacts to your company.

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

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

To create a contact group based on customer criteria:

1. Go to Campaigns > Contacts > Search.
2. Make sure the Use Advanced Search box is checked.
3. Click Create Saved Search.
4. On the Criteria subtab, set criteria based on customer fields.
5. After setting the customer criteria, click Save.
6. Go to Campaigns > Marketing > Groups > New.
7. On the Create Group page, choose Dynamic, and select Contact in the list.
8. Enter a name for this group.
9. Next to the Saved Search field, choose the saved search you created.
10. Click Save.

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

After viewing the marketing email, the contacts place orders on behalf of their employers. As each order is placed over the phone, Wolfe sales reps enter the campaign's coupon code on the order. Later, Wolfe marketing managers can view the Campaign ROI Analysis and Sales by Promotion reports to determine how successful the campaign was.
When contacts submit online customer forms, it is tracked on the Online Forms subtab on the contact record. By default, the name of the online form, the contact’s company, and the lead source that resulted in the form submission are shown for each submission. The submission is also shown on the Online Forms subtab of the customer record the contact is associated with.

**Campaign Calendar**

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

**To add campaign events to a calendar portlet:**

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

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

**Tips for Campaigns**

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

**Direct Mail**

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

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

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

**Imported Leads Lists**

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

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

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

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

If you default lead sources on sales transactions as described in **Tracking Campaign Revenue**, you can link the revenue generated by these leads to the campaign.
To track revenue for imported leads, be sure to set the Default Lead Source on Sales Transactions preference at Setup > Sales & Marketing Automation > Set Up Marketing to Based on Lead Source. Then, when a transaction is entered for a customer with this lead source, the campaign event is defaulted on the transaction, enabling you to track campaign revenue and calculate ROI.

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

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

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

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

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

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

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

Email Campaign Checklist

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

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

Email Best Practices

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

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

<table>
<thead>
<tr>
<th>Five Golden Rules For Outbound Email</th>
<th>Always send using a FROM domain you control</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Do not send email messages on behalf of customers, and never use customer email addresses in the FROM field.</td>
</tr>
<tr>
<td></td>
<td>Never send from addresses using a DNS record you don't control.</td>
</tr>
</tbody>
</table>
### Email Best Practices

<table>
<thead>
<tr>
<th>Step</th>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Manage Your Scripts</td>
<td>Check your SuiteScript outbound mail scripts regularly. Delete any obsolete scripts or deprecated customizations promptly.</td>
</tr>
<tr>
<td>3</td>
<td>Be Compliant</td>
<td>- Ensure you have proper DNS records set up for DKIM on the domains you send email from. See the help topics DomainKeys Identified Mail (DKIM) and Email Domains.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Consider setting up a DMARC policy record for your company's entire email infrastructure. See Domain-based Message Authentication, Reporting and Conformance (DMARC).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- For NetSuite purposes, as of 2018.1, it is no longer necessary to set up DNS records for SPF on the domains you send email from. However, depending on the needs of your company, it might be necessary to create a DNS record for SPF. See Sender Policy Framework (SPF).</td>
</tr>
<tr>
<td>4</td>
<td>Be Aligned</td>
<td>If you have an email relay between NetSuite and your mailbox provider (where the MX points), ensure the MAIL-FROM (ENVELOPE-FROM, RETURN-PATH) is rewritten to pass the SPF check.</td>
</tr>
<tr>
<td>5</td>
<td>Be Hygienic</td>
<td>- Never send spam or unwanted email.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Never send single email more than a single time.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Always honor unsubscribe requests.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Do not send or forward email with content (especially attachments) that is unknown to you.</td>
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</tbody>
</table>

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

### DomainKeys Identified Mail (DKIM) and Email Domains

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

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

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

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

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

Using DMARC, an administrator of a domain can determine how email messages using an address from the sender's domain will be perceived by a receiving system. DMARC informs the receiver which
validations (SPF or DKIM, or both) will pass to trust that the email message has been sent by the sender identified by the From: address.

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

**Important:** Setting up a DMARC policy affects the entire email infrastructure of your company. The administrator responsible for your company's email infrastructure should be involved in setting up a DMARC policy record with your domain provider. Consider carefully how strong a policy to implement as it may have consequences. For example, if you use the optional rua tag, it might consume some of your company’s email resources, depending on the volume of reports you might receive.

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

### Sender Policy Framework (SPF)

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

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

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

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

**Note:** Never whitelist the range of NetSuite IP addresses. For more information, see the help topic [NetSuite IP Addresses](https://dmarc.org/overview).

### Optimizing Email Campaigns

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

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

Spam is not restricted to email with inappropriate or harmful content. Spam is defined only by whether or not the recipient has agreed to receive it. For example, email sent to a list purchased from a third party is considered spam.
To ensure that those who use campaigns irresponsibly do not adversely impact legitimate marketing campaigns, NetSuite employs criteria to separate appropriate email campaigns from email that might be spam.

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

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

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

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

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

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

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

### Characteristics of Legitimate Campaign Email

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

Legitimate marketing email has the following characteristics:

- The recipients have opted in to your campaigns. **This is the most important indicator in determining whether an email message is spam.**
  
  For information on opting in to campaigns, see How Customers Opt In to Marketing Campaigns.
- The campaign recipients have purchased or responded to your campaigns in the past.
- The email uses a campaign email domain.
  
  For information on campaign email domains, see Campaign Email Domains.
- The email uses domain key identified mail (DKIM).
  
  You can use the same domain you use for your campaign email domain for DKIM. For more information, see the help topic DomainKeys Identified Mail (DKIM).
- You have garnered a positive sender reputation through your previous campaigns.
  
  For more information, see Developing a Positive Email Sender Reputation.

### Characteristics of Possible Spam

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

Email that might be spam has some or all of the following characteristics:
The recipients have not opted in to the campaign. **This is the strongest indication that a campaign might be spam.**

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

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

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

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

### Campaign Email Limits

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

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

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

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

### Choosing Email Recipients

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

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

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

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

Repeatedly sending email to an invalid email address damages your sender reputation. To help with this, NetSuite automatically logs when email messages return hard bounce responses and does not send email to those addresses for a designated period of time. For more information, see **Managing Bounced Email.**
To ensure that you only send email to valid email addresses, be sure you have set a suitable time increment for bounced email addresses at Setup > Marketing > Preferences > Marketing Preferences > Subscription.

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

- **Global Subscription Status is Confirmed Opt-In**
  Sending to recipients who have confirmed that they want to receive your email is the most important factor in determining if your email meets the Marketing Automation Terms of Service. You can send email campaigns to recipients with the status of Soft Opt-In, but your email might not be delivered as quickly or as successfully as it would be to Confirmed Opt-In customers.

- **Hard Bounced is false**
  If you have set the Remove email addresses from Bounced Email Addresses list after preference, these email addresses are not sent email, but adding this criterion prevents you from incurring a charge for these messages.

- **Campaign Response Fields...: Campaign Response Filter: Response is none of Failed - spam**
  This filters recipients who have flagged your email as spam in the past.

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

### Developing a Positive Email Sender Reputation

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

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

Maintaining a positive sender reputation leads to faster delivery.

### Improving the Deliverability of Your Campaign Email

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

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

- **Only send campaign email to customers who have purchased from you or responded to prior campaigns.** For tips on creating recipient groups, see Choosing Email Recipients.

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

Subscription Management

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

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

Email recipients can have one of four subscription statuses:

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

  Getting recipients to opt in results in better delivery rates and faster delivery because these messages are less likely to be labelled as spam by ISPs.

- **Soft Opt-In** - Recipients with this status receive all email marketing campaigns that are received by recipients with the Confirmed Opt-In status. They also receive opt-in messages that enable them to confirm whether or not they want to receive the email campaigns.

  Recipients cannot set their own status to Soft Opt-In; it is done within NetSuite, either manually or through mass update.

- **Soft Opt-Out** - Recipients with this status do not receive campaign email messages but they do receive opt-in messages.

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

- **Confirmed Opt-Out** - Only the recipient can set their subscription status to Confirmed Opt-Out.

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

<table>
<thead>
<tr>
<th>Status</th>
<th>Receive campaigns?</th>
<th>Receive opt-in message?</th>
<th>Set by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirmed Opt-In</td>
<td>yes</td>
<td>yes</td>
<td>recipient only</td>
</tr>
<tr>
<td>Soft Opt-In</td>
<td>yes</td>
<td>yes</td>
<td>manual or mass update</td>
</tr>
<tr>
<td>Soft Opt-Out</td>
<td>no</td>
<td>yes</td>
<td>manual or mass update</td>
</tr>
<tr>
<td>Confirmed Opt-Out</td>
<td>no</td>
<td>no</td>
<td>recipient only</td>
</tr>
</tbody>
</table>

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

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

Subscription status is tracked in the Global Subscription Status field on each record. This field is located in the Subscriptions subtab of the Marketing tab. The Subscription Message History subtab
contains information about all subscription invitation and confirmation email messages sent to the entity after June 2018.

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

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

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

Creating Subscriber Lists Using Saved Searches

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

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

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

Setting Up Campaign Subscriptions

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

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

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

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

How Customers Opt In to Marketing Campaigns

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

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

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

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

- **Through opt-in email**
  
  You can send email messages to invite entities to change their subscriptions. You can either click the Send Subscription Email link or you can use a mass update. It is advisable not to spam entities with opt-in email messages. You can check how many opt-in messages have previously been sent to an entity in the Subscription Message History subtab of the Marketing tab. For more information, see Opt-In Email and Viewing List of Subscription Messages Sent to a Recipient.

- **Opting-in through the Campaign Subscription Center**
  
  Email recipients can change their subscription settings in the Customer Center, Partner Center, Advanced Partner Center, or Vendor Center.

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

  If the Campaign Subscription Categories feature is not enabled, an entity can check the box to unsubscribe to all bulk email communication.

- **Clicking the Opt-In link in the footer of an email campaign message**
  
  Every email message you send includes a link your customers can click to set their email preferences. Clicking this link opens the Campaign Subscription Center.

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

There are two subscription messages you can send to your customers to allow them to set their email preferences: **opt-in confirmation email** and **opt-in invitation email**. These email do not count against your monthly email allotment. It is advisable not to spam entities with opt-in email messages. You can check how many opt-in messages have previously been sent to an entity on the Subscription Message History subtab of the Marketing tab. For more information, see Viewing List of Subscription Messages Sent to a Recipient.

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

Opt-In Invitation Email

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

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

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

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

Opt-In Confirmation Email

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

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

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

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

Sending Subscription Messages

You can send subscription messages in two ways:
To a large group of recipients
To individual recipients

Avoid sending subscription email repeatedly as the recipients may consider it spam. Certain jurisdictions, such as the EU, have regulations regarding whether or not you can contact entities if you do not have their explicit permission to do so. You should ensure that your use of subscription messages adheres to the regulations in the relevant jurisdiction. See Viewing List of Subscription Messages Sent to a Recipient for information on how to check how many subscription invitation and confirmation email messages have already been sent to an entity.

To send subscription messages to a group of recipients:

1. Go to Lists > Mass Updates > Mass Updates.
2. Under Marketing, click the link for the type of recipient you want to send to.
3. On the Mass Update page, select the type of message.
4. Set the criteria for the recipients you want to receive your invitations and Save. Your messages are sent.

To send subscription messages to an individual:

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

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

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

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

5. Click Send to send the message.

**Viewing List of Subscription Messages Sent to a Recipient**

To avoid spamming recipients with multiple, repetitive subscription invitation and confirmation messages, you should check how many of these messages have previously been sent before deciding to send another one.

**To view all subscription messages sent to a recipient:**

1. Open the recipient's record.
2. Click the Marketing tab.

3. The Subscription Message History subtab contains a list of all subscription invitation and confirmation email messages previously sent to the recipient. The list is organized by date and time and contains information about the sender, the recipient, and the type of message.

Campaign Subscription Categories

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

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

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

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

To create a new subscription category:

1. Go to Setup > Sales & Marketing Automation > Campaign Subscriptions > New.
2. Enter the name of this subscription category and a description.
3. Check the Subscribed by Default box if you want new and existing records to be subscribed to this campaign subscription.
   Entities must manually subscribe to subscriptions that they are unsubscribed to.
4. In the External Name field enter the name of this subscription category as you want it to appear in the Campaign Subscription Center.
5. In the External Description field, enter the description of this category that you want to show in the Campaign Subscription Center.
6. Click Save.

Campaign Email Domains

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

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

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

When you set up a campaign email domain, all links and other references to netsuite.com that might appear in the email campaigns you send are instead replaced with your domain.
Important: Even if you do not host your web store with NetSuite, you should not use your web store or site domain as your email domain.

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

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

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

To set up your email domain name in NetSuite:

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

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

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

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

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

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

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

In addition to email domains, you can also upload your own email domain keys to increase your delivery rates. For more information, see the help topic DomainKeys Identified Mail (DKIM).
Creating a Campaign Email Address Record

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

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

To create a campaign email address record:

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

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

To validate an email address:

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

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

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

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

Marketing Templates

You can create marketing templates for:

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

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

Online form templates are HTML documents that can create outside of NetSuite and then upload to your NetSuite file cabinet for use with your online forms. For more information on creating online form templates, see the help topic Online Form Templates.
You can personalize your templates with information from customer, vendor, partner, employee, or contact records. For example, you might want to have the name of your customers included in the greeting of your monthly newsletter. Email campaign templates can be created as scriptable templates. For more information, see the help topic Scriptable Templates.

**Email Marketing Templates**

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

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

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

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

**To insert images from the file cabinet into email templates:**

1. Go to Documents > Files > File Cabinet and open the folder containing the required image.
2. Click **Edit** next to the image you want to use in the email template.
3. Copy the URL of the image file. If there is more than one listed, copy the one which begins `https://system`.
4. On the Email Template (Scriptable) form, position where you want the image to appear using the WYSIWYG editor.
5. Click the **Picture** icon on the editor. Paste the URL of the image into the **URL** field of the **Image Properties** box.
6. Click **OK**. The image will now be inserted into the template.
7. When you have finished formatting your template, click **Save**.
Scriptable templates enable you to insert personalized information in the body of your email templates through the use of FreeMarker code. For more information, see the help topic Scriptable Templates.

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

```html
<b>Dear <#if Customer.companyName != "">${Customer.companyName}<#else>Customer</#if>,<b>
<p>Now you have unique opportunity to get your favorite items with 20% discount!</p>
<p>All you need to do is to use the following coupon code when you place an order on our site: ${CampaignEvent.couponCode}</p>
</#assign printedOutItems = 0>
</List Customer.correlatedItems as itemLine>
</if 3 < itemLine.correlation>
<#img src="${itemLine.upsellItem.imageURL}" alt="${itemLine.upsellItem.displayName}" height="128" width="128"/>\r
</#if>
</if printedOutItems = 3><#break></#if>
</List>
</if 3 < printedOutItems>
</List Customer.relatedItems as itemLine>
<#img src="${itemLine.upsellItem.imageURL}" alt="${itemLine.upsellItem.displayName}" height="128" width="128"/>
<#assign printedOutItems = printedOutItems + 1>
<#if printedOutItems = 3><#break></#if>
</List>
</if>
<p>
Best regards,\r
<br/>
${preferences.MESSAGE_SIGNATURE}
</p>
```

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

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

With campaign email templates, you can:

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

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

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

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

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

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

**To create a marketing email template:**

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

**Template Subtab**

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

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

To insert a field in the template, select the record type in the Field Type list, and select a field in the Insert Field list.
**Note:** If you use the UK Edition, to comply with UK law, your business address and VAT number are included in the footer of all email you send to those outside of your company.

### Restrict Access Subtab

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

### Marketing Subtab

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

1. In the **From Name** field, enter the name you want to appear in the **From** field on email messages you send with this template.
2. In the **From Email** address field, select a validated email address to appear in the **From** field of your marketing email.
3. In the **Reply to Email** address field, select a validated email address to receive responses to your marketing email.
   You can create and validate email address records at Setup > Campaign Email Addresses > New.
4. Check the **Email as Sales Rep** box if you want replies to the email generated by this template to be sent to the sales rep assigned to customer recipients.
   If you check this box, each campaign email shows the nickname and From email address entered by the rep at Home > Set Preferences > General under the User Profile heading. If the rep does not have a profile set up, the marketing email address and From name entered on the template record are used.
   **Note:** This setting overrides the reply to email address set in the **Reply To Email Address** field.
5. In the **Campaign Domain** field, select the campaign domain you want to use for this template.
   For more information, see Campaign Email Domains.
6. In the **Subscription** field, select the category of campaign subscription that this email template is used for.
   When you select this template for an email merge or a marketing campaign, this campaign subscription is chosen by default. For more information, see Campaign Subscription Categories.
7. If you want to track statistics related to how often this email message is opened or clicked through, check the **Track Outgoing Email** box.
   If you choose to track marketing email statistics, whenever a recipient of your marketing email opens or clicks through a message, a request is sent to NetSuite's server. Some of your marketing email recipients may have concerns about this process that you may want to address in your company's privacy policy.
   **Note:** Only links to pages in NetSuite are tracked as having been clicked for campaign response reporting. For example, a link to a page in your NetSuite Web site or an online customer form would be tracked, but a link to a third-party site would not be tracked.

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

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

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

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

Creating an Email Marketing Campaign

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

To create an email marketing campaign:

1. Go to Campaigns > Marketing > Marketing Campaigns > New.
2. Under Primary Information:
   1. If you use custom forms, you can select a custom campaign form.
   2. Enter an ID for this campaign in one of the following ways:
      If you use auto-generated numbers for campaigns, an ID is generated automatically.
      If you do not use auto-generated numbers for campaigns, enter an ID.
      Campaign IDs can be used to more easily identify campaigns, especially in the event that campaigns share similar names.
         Note: Additionally, campaign IDs can be used when passing lead source information into online customer forms.
   3. Enter a title for this campaign.
      You can enter up to 99 characters in this field.
   4. Select the category this campaign belongs in.
   5. Select a campaign manager for this campaign.
      The campaign manager receives confirmation that email campaign events have been sent.
   6. Enter or pick the start date and end date for this campaign.
   7. In the Base Cost field, enter the cost of this campaign apart from the cost of any specific campaign events.
      The Total Cost field shows the sum of the cost of any campaign events and the base cost.
   8. Enter the URL for the campaign landing page or online customer form associated with this campaign.
Creating an Email Marketing Campaign

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

9. In the Expected Revenue field, enter the amount of revenue you expect this campaign to generate.

3. Under the Events subtab, click the Email subtab.

4. In the Target Group column, select the group that receives the campaign email.

5. If you want to test this mailing by sending it to only a portion of this group, select the test cell you want to send it to.
   For more information, see Marketing Test Cells.

6. Select a template category in the Template Category column to filter the list of email templates to that category.
   This field is only available if you have enabled the CRM Template Categories feature.

7. Select the template for the email you are sending in the Email Template column.

8. Enter a title for this campaign event.

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

10. Enter the cost incurred by this campaign event.

11. In the Status column, select the status of the campaign event.
    If you select Execute for an email campaign event, NetSuite will send your email on the date and time you set in the Delivery Date and Delivery Time fields.

12. Select the date and time you want this campaign event to occur.

13. If you want to associate a promotion with this campaign event, select it in the Promotion column.

14. Click Add/Edit.

15. Repeat these steps for each event for this email campaign.

16. Click Save.

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

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

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

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

Handling of Spam When Notified by Mail Service Providers

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

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

Creating Email Campaigns Using the Campaign Assistant

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

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

- Setting Up Campaign Assistant
- Creating Email Campaigns

Setting Up Campaign Assistant

Prerequisites

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

Installation

To install the Campaign Assistant SuiteApp:

1. Go to Setup > Company > Enable Features.
2. Click the CRM subtab.
3. Under the Basic Features section, click the Campaign Assistant link.

Roles and Permissions

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

- Marketing Administrator
- Marketing Assistant
- Marketing Manager

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

<table>
<thead>
<tr>
<th>Navigation</th>
<th>Permission</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permission &gt; Lists</td>
<td>CRM Groups</td>
<td>Full or Create</td>
</tr>
<tr>
<td></td>
<td>Marketing Campaigns</td>
<td>Full or Create</td>
</tr>
<tr>
<td></td>
<td>Marketing Template</td>
<td>Full or Create</td>
</tr>
</tbody>
</table>
Creating Email Campaigns

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

Step 1: Entering Campaign Details

To enter campaign details:

1. In the Primary Information section, enter values for the following fields:
   - **Title** – Enter a title for this campaign. You can enter up to 99 characters in this field.
   - **Category** – Select a category for this campaign. You can create new campaign categories at Setup > Marketing > Campaign Management > Categories > New. For more information, see Campaign Categories.
   - **Manager** – Select a campaign manager. The campaign manager receives confirmation when email campaign events have been sent.
   - **Start Date** – Enter or select a start date for this campaign.
   - **End Date** – Enter or select an end date for this campaign.
   - **Base Cost** – Enter the cost of this campaign apart from the cost of any specific campaign events.
   - **Expected Revenue** – Enter the amount of revenue you expect this campaign to generate.
   - **URL** – Enter the campaign landing page or online customer form associated with this campaign.
   - **Description** – Enter a description for this campaign.

2. In the Related Information section, enter values for the following fields:
   - **Vertical** – Select a marketing vertical related to this campaign. For more information, see the help topic Campaign Verticals.
   - **Promotion Code** – Select a promotion to offer with your campaign. You can enable promotion codes at Setup > Company > Enable Features. Click the Transactions tab, then check the Promotion Codes box under the Sales subfield. You can create new promotion codes at List > Marketing > Promotions > New. For more information, see the help topic Promotion Code.
   - **Audience Description** – Select your audience for this campaign.
   - **Offer** – Select an offer that you want to associate to this campaign. You can create new offers at Setup > Sales > Setup Tasks > CRM Lists > New. For more information, see the help topic Campaign Offers.
   - **Item** – Select the items associated with this marketing campaign. You can create new items at Lists > Accounting > Items > New.

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

Step 2: Selecting the Event Target Group Type

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

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

2. Select the type of members you want to include in this target group from the list.

   **Note:** If you do not use the Partner Relationship Management feature, the Partner member type will not appear in the list. Go to Setup > Company > Enable Features and click the CRM subtab to enable this feature.

3. If you are creating a dynamic group, select an existing saved search from the list or select **New** to create new search criteria for the target group.
   
   When a saved search has been created or selected, the criteria used to filter saved search records will be displayed under the **Criteria Details** section.

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

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

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

Step 3: Selecting the Event Target Group

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

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

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

To create a target group:

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

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

3. Click Add after selecting each member.
   To delete a member, click the x found on the right side.

4. Click Next to select an event template for this campaign.

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

---

**Step 4: Selecting an Event Template**

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

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

---

**To create an event template:**

1. Select New from the Template list.

2. In the Create Campaign Email Template section, enter values for the following fields:
   - **Name** – Enter a name for this template
   - **Description** – Enter a description for this template.

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

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

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

Step 5: Entering Event and Schedule Details

To enter event and schedule details:

1. In the Event Information section, enter values for the following fields:
   - **Title** – Enter a title for this campaign event.
   - **Cost** – Enter the cost incurred by this campaign event.
     Entering a cost lets you track return on investment (ROI) for the campaign.

2. In the Schedule Information section, enter values for the following fields:
   - **Status** – Select the status of the campaign event. If you select Execute for an email campaign event, NetSuite will send your email on the date and time you set.

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

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

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

Step 6: Reviewing Email Campaign

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

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

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

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

Lead Nurturing Campaigns

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

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

Lead nurturing campaigns can use NetSuite's Workflow Manager and enable you to customize the criteria used to determine who receives each campaign message, the timing of these messages, and the actions or responses that trigger subsequent email.
To see complete steps for creating the lead nurturing campaign example above, see the help topic Lead Nurturing Workflow. Read Configuring Your Lead Nurturing Workflow for help on applying the sample workflow to your own lead nurturing campaigns.

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

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

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

Configuring Your Lead Nurturing Workflow

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

Be sure to make a note of:

- which leads you send lead nurturing email to
  This will help you determine the criteria your workflow uses to select recipients.
- how you determine which templates get sent at each point of the lead nurturing campaign
  This information is used to create states and transitions in the workflow.
- how much time should pass before sending out each successive email message
  These delays can be implemented at any point in your workflow in the transitions.

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

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

Creating a Lead Nurturing Campaign

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

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

To create a lead nurturing campaign:

1. Go to Campaigns > Marketing > Marketing Campaigns > New.
2. Under Primary Information, enter the title and other information related to the campaign.
3. Under the Events subtab, click the Lead Nurturing subtab.
4. In the Template Category column, select a category to filter the list of templates to this category.
   This field is available only if you have enabled the CRM Template Categories feature.
5. In the Template column, choose one of the email marketing templates you want to use in this campaign.
   You can update the email subject in the Title column or accept the subject on the template record.
6. If you know the cost of this campaign event, enter it in the Cost column. You can update this later.
7. If you are offering a discount through this event, or if you want to track this event with a promotion, select it in the Promotion column.
8. Click Add.
9. Repeat these steps for each different template used in your lead nurturing campaign.
10. When you have entered all of the templates used in this campaign, click Save.

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

Sending Newsletters Through Email Campaigns

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

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

Best Practices

To maximize the impact of your newsletter:

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

How to Set Up Your Newsletter Campaign

To set up the campaign used to distribute your newsletter:

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

5. Set the time and date for delivery, and set the status of the events to Execute. See Initiating Campaign Events.

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

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

Marketing Test Cells

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

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

To create a marketing test cell:

1. Go to Leads > Relationships > Groups.
2. Click Edit next to the group you want to divide into test cells.
3. Click the Test Cells subtab.
4. In the Name column, enter a name for a test cell of this group.
5. In the Percentage column, enter the percentage of group members you want to be a part of this test cell.
6. Click Add.
7. Repeat these steps for each test cell.
   Make sure that the percentages add up to 100%.
8. Click Save.

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

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

Attaching Files to Email Campaigns

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

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

To link to a file, you must first check the Available Without Login box on the file record. This permits anyone with the file’s URL to access it.
Next, you can link to this file in the email template you use with your campaign. When a recipient receives your email they can view or save the file with this link.

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

### Managing Bounced Email

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

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

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

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

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

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

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

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

### Troubleshoot Undelivered Email

This topic includes some troubleshooting tips for determining why email messages from NetSuite are not being delivered.
See also the Five Golden Rules for Outbound Email in Email Best Practices for information on how to optimize email campaign delivery.

1. If an email message to one person was not delivered, go to Lists > Relationships > Bounced Email Addresses to determine if the recipient is on the bounced email list. For more information, see Viewing the Bounced Email Address List.

2. Determine whether the email was blocked by NetSuite or whether it was rejected on the destination mail system. For more information, see Undelivered Emails Saved Search.

3. Go to Lists > Mailing > Undelivered Emails. Find the email address and look at the value in the Compliance Verified column. If the email address is not compliant, check the DKIM settings for your account. For more information about email compliance, see the help topic DomainKeys Identified Mail (DKIM).

4. If the Compliance Verified column is set to No, go to Setup > Company > Email > Email Preferences. On the Domain Keys subtab, verify or set up a DKIM key for the domain that was populated by the customer in the From header of the email. As of 2017.2, you can set multiple DKIM keys for each domain that they use in the From header. When sending an email message, NetSuite uses the DKIM key that best matches the From domain in the current email message. For more information, see the help topic Setting Email Preferences.

Undelivered Emails Saved Search

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

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

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

<table>
<thead>
<tr>
<th>Error</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not sent: Blocked by mail filter</td>
<td>The sending rate is not accurate or is too high (similar email messages are being sent too rapidly).</td>
</tr>
<tr>
<td>Not sent: Specific address(es) recently bounced</td>
<td>The email was not sent because the recipient address appears on the Bounced Email Addresses list.</td>
</tr>
<tr>
<td>Permanent Failure: Delivery not authorized, message refused</td>
<td>The sender is not authorized to send to the destination. This can be the result of per-host or per-recipient filtering.</td>
</tr>
<tr>
<td>Permanent Failure: No answer from host</td>
<td>The outbound connection attempt was not answered.</td>
</tr>
<tr>
<td>Permanent Failure: Bad destination mailbox address</td>
<td>The mailbox specified in the address does not exist.</td>
</tr>
<tr>
<td>Permanent Failure: Unable to route</td>
<td>The mail system was unable to determine the next hop for the message because the necessary routing information was unavailable from the directory server.</td>
</tr>
<tr>
<td>Permanent Failure: Mailbox disabled, not accepting messages</td>
<td>The mailbox exists, but is not accepting messages.</td>
</tr>
</tbody>
</table>
A specific email message can have more than one error log record. The destination domains in the original To header determine whether a new error log record is created. Search results can be filtered by Reason, Recipients, and Log Date.

Invalid Email Address Notification

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

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

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

Mass Unsubscribing Entities with Bounced Email Addresses

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

To unsubscribe entities with bounced email addresses:

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

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

## Viewing the Bounced Email Address List

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

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

<table>
<thead>
<tr>
<th>Soft Bounce</th>
<th>Hard Bounce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mailbox Full</td>
<td>Unknown User</td>
</tr>
<tr>
<td>Disabled Account</td>
<td>Bad Domain</td>
</tr>
<tr>
<td>Greylisted</td>
<td>Address Error</td>
</tr>
<tr>
<td>Server Too Busy</td>
<td>Account Closed</td>
</tr>
<tr>
<td>Soft Bounce - Other</td>
<td>Hard Bounce</td>
</tr>
</tbody>
</table>

**Key Features:**

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

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

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

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

When you have cleared the bounce history for an email address, you can send messages to that address.
Creating Groups Based On Campaign Response Count

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

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

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

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

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

There are three ways to create keyword campaigns:

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

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

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

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

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

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

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

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

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

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

Creating Keyword Campaigns in Bulk

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

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

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

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

Importing Keyword Campaigns

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

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

To import keyword campaigns:

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

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

**Naming Keyword Campaigns**

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

By default, this naming template used the following format:

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

So an actual keyword campaign title might be:

```
Keyword-Google-electronics
```

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

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

**Exporting Keywords**

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

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

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

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

**Submitting Your Paid Search Proposal**

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

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

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

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

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

http://yourlandingpage.com?leadsource=yourcampaignID

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

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

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

Managing Cost-Per-Click

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

Campaign Families

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

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

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

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

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

The Upsell Manager enables you to maximize your sales and marketing efforts by determining which items present a good upsell opportunity and which customers you should target. This process is also known as product affinity analysis.

The Upsell Manager searches your customer transaction histories to recommend possible upsell items and categories of items. These upsell items and item categories are chosen based on their correlation. Correlation is a measure of how often two items are purchased by the same customer.

For example, Wolfe Electronics uses NetSuite's Upsell Manager to determine that 30% of customers that bought desktop computer systems also purchased store warranties on those machines. Wolfe decides to create a list of customers that have purchased desktops that have not yet purchased warranties in the hopes of upselling store warranties.

Another value used by the Upsell Manager is lift. Lift is the difference between an item's correlation and its purchase rate (percentage of customers who have purchased it).

Then, NetSuite creates a list of customers that are likely to buy the items you choose to upsell. The Upsell Manager then guides you through each step in the process.

When you have determined which items to upsell and which customers to target, you can choose to create:

- a customer group that you can target in marketing campaigns
- tasks for each customer's sales rep to upsell the selected upsell items to
- scheduled phone calls for each customer
- opportunities for each customer that include the upsell items

You can also determine upsell items on customer records or on sales transactions. When the Upsell Manager feature is enabled:

- an Upsell subtab appears on customer records listing potential upsell items for the customer
- an Upsell Items button appears on sales transactions. After you select items on the transaction, click Upsell Items to see a list of items that correlate with the items you have chosen.

Note: To maintain NetSuite's performance, it is strongly recommended that you set upsell preferences at Setup > Sales > Upsell Preferences to limit the number items that are shown on the Upsell subtab of the customer record and the Upsell Items popup on transactions.

To upsell to your customers, you can:

- Create lists of upsell customers using the Upsell Manager Wizard at Campaigns > Marketing > Upsell Manager.
- On sales transactions, use the upsell items popup to add upsell items to a transaction.
- From customer records, view a list of upsell items and create opportunities for those items.

To turn on the Upsell Manager feature, an administrator can go to Setup > Enable Features > CRM, check the Upsell Manager box, and click Save.

Using the Upsell Manager Wizard

The NetSuite Upsell Manager enables you to maximize your sales and marketing efforts by determining which items or item categories present a good upsell opportunity and which customers you should target.
The Upsell Manager searches your customer transaction histories to recommend possible upsell items. These possible upsell items or categories of items are chosen based on their correlation. Correlation is the percentage of customers who purchased the upsell item and another item.

To upsell with the Upsell Manager, go to Campaigns > Marketing > Upsell Manager.

Step 1 of 5: The Upsell Manager Wizard

There are two ways to use the Upsell Manager to determine upsell items and target customers. You can base your upsell on:

- **Items to Upsell** – Choose this option if you already know which items or item categories you want to upsell.
- **Items Purchased** – Choose this option if you are not yet sure which items or item categories you want to upsell. This option lets you search for upsell items based on past purchases.

Then, click Next.

Next, you can select upsell items.

Step 2 of 5: Selecting Upsell Items

You can either selecting the items you want to upsell or search for items that provide strong upsell opportunities. Click one of the following links:

Up-selling Based on Items to Upsell

If you base your upsell on items to upsell, you first select your upsell items or item categories. NetSuite presents a list of items and categories that have sold well with the upsell items you chose.

This correlation between purchased items and upsell items is shown as the percentage of customers who have purchased both the upsell item and the correlated item.

After choosing the upsell items you will use these items to create a list of customers that have purchased the correlated item but have not purchased the upsell item.

For example, a Wolfe Electronics sales rep wants to upsell service plans. They use the Upsell Manager to determine that there is a strong correlation between service plans and desktop computers. They create a group of customers that have purchased desktop computers but have not yet purchased service plans.

To select specific upsell items:

1. Select the items or item categories you want to upsell in the **Items to Upsell** field.
   Hold **CTRL** to select more than one item.
2. You can set the following upsell search criteria to filter your upsell item search results:
   - **Correlation Greater Than** – only items with correlation greater than what you set here are returned in your upsell item search.
     Correlation is the percentage of customers that purchased both the upsell items and each item in your upsell search results.
   - **Count Greater Than** – only items with a greater count than what you set here are returned in your upsell item search.
Count represents the number of customers that have purchased both the upsell items and each item in your upsell search results.

3. Click Search.
   A list of items and categories that have correlation with the upsell items you selected appears.

4. If you need to change your search criteria, make your changes, and click Refresh.

5. Select the pair of items you would like to base your upsell on by checking the box in the Apply column.

6. Click Next.

NetSuite automatically creates a customer search based on items purchased.

You can now set additional criteria for your upsell customer search.

Upselling Based on Items Purchased

If you base your upsell on items purchased, you first select items customers have purchased in the past, and NetSuite presents a list of upsell items that have sold well with the purchased items.

This correlation between purchased items and upsell items is shown as the percentage of customers who purchased the correlated item as well as the upsell item.

For example, a Wolfe Electronics sales rep uses the Upsell Manager to decide which items they can upsell to their customers. They determine that there is strong correlation between desktop computers and wireless routers. They create a group of customers that have purchased desktop computers but have not yet purchased wireless routers.

To select upsell items based on items purchased:

1. Select the purchased items in the Items to Upsell field.
   Hold CTRL to select more than one item.

2. You can set the following upsell search criteria to filter your upsell item search results:
   - **Correlation Greater Than** – only items with correlation greater than what you set here are returned in your upsell item search.
     Correlation is the percentage of customers who purchased both the upsell item and each item in your upsell search results.
   - **Lift Greater Than** – only items with greater lift than what you set here are returned in your upsell item search.
     Lift is the degree to which the item's correlation exceeds its overall purchase frequency \((\text{correlation} - \text{purchase frequency})\). Purchase frequency is the percentage of customers who have purchased an item.

     A high lift implies a more reliable correlation.

     For example, Wolfe Electronics has sold Impressivo 3000 laptops to 100 customers. Four of the customers also purchased a premium warranty. The correlation between the laptop and the warranty is 40%. Wolfe has 1000 customers, so the purchase frequency is 10%. The lift is 30%.

     Wolfe has sold its less expensive Impressivo 1000 laptops to 300 customers. 150 of these customers purchased the premium warranty, giving a correlation of 50% and a purchase frequency of 30%. The lift is 20%.
Using the Upsell Manager Wizard

- **Count Greater Than** – only items with a greater count than what you set here are returned in your upsell item search.
  Count represents the number of customers that have purchased both the upsell items and each item in your upsell search results.

3. Click **Search**.
   A list of potential upsell items appears.

4. If you need to change your search criteria, make your changes, and click **Refresh**.

5. Select the pair of items you would like to base your upsell on by checking the box in the **Apply** column.

6. Click **Next**.

You can now set additional criteria for your upsell customer search.

**Step 3 of 5: Additional Customer Criteria**

After you have chosen your upsell items or item categories, you can define the list of customers you are targeting with the upsell.

By default, the customer search finds customers that have purchased the upsell items but have purchased other correlated items. You can set additional criteria if you want to filter the results further.

If you do not want to set additional criteria, click **Next**.

**To add criteria to the customer search:**

1. On the **Criteria** subtab, select a filter.
2. Enter the filter criteria.
3. Click **Add**.
4. Repeat these steps for each additional filter.

You can also change the way your customer search results appear.

**To change how your results display:**

1. Click the **Results** subtab.
2. At the top of the subtab, choose which columns determine the order of the list of results.
3. In the **Field** column, select a field to add a column to the results.
4. Click **Add**.
5. Repeat these steps for each new column.

After you have set additional criteria, click **Next**. NetSuite searches for customers that match your criteria and returns a list of results.

Now, you can preview your list of upsell customers.

**Step 4 of 5: Previewing Your Upsell Customer List**

After you have accepted your customer search criteria, NetSuite returns a list of customers that fit your criteria.
If you want to exclude any of these customers from the upsell effort, clear the box in the **Apply** column next to the customer’s name.

If you want to return to the search criteria page, click **Back**. To accept the customer list, click **Next**.

**Note:** Clicking **Next** does not contact customers.

When you have chosen the customers you want to include, you can choose upsell actions.

### Step 5 of 5: Choosing Upsell Actions

After you have selected your upsell customers, you can choose how NetSuite proceeds with the results.

On the Choose Upsell Action page, there are four options. You can choose any of these actions for this upsell effort.

For each upsell action, enter information in the accompanying fields for NetSuite to use when creating the records.

For example, a Wolfe Electronics sales rep chooses to create opportunities from upsell customer search results. In the Title field, they enter **Store Warranty Upsell**. For the expected close date, they enter the last day of the month. An opportunity is created for each customer in the upsell customer results with the same title and expected close date.

- **Create a group of customers to upsell to**
  - If you choose this action, a group record is created in NetSuite from this list of upsell customers. You can then create a marketing campaign targeting this group or perform a bulk merge offering the upsell items to these customers.

- **Create tasks for the sales reps assigned to the upsell customers**
  - If you choose this action, task records are created in NetSuite assigned to the sales rep for each customer.

- **Schedule phone calls for each upsell customer**
  - Choosing this action creates phone call records for the sales rep assigned to each customer.

- **Create opportunities for each upsell customer**
  - Choosing this action creates opportunity records for each customer. These opportunities have the upsell items selected by default.

**Note:** You can create opportunities only for upsell items. You cannot add item categories to opportunities.

After you have chosen your upsell actions, click Finish.

### Upselling From Customer Records

When viewing customer records, you can view a list of potential upsell items and item categories.

The Upsell subtab presents suggested upsell items that have sold well with items that customers have purchased.
The list of upsell items also displays a correlation and count for each set of items. Correlation is the percentage of customers that purchased the upsell item as well as the items purchased by the customer. The Count value indicates the number of customers that have purchased both items, which gives you an idea of the reliability of the correlation.

For example, Wolfe Electronics considers two items for upselling. The first item has a correlation of 50% and a count of 6. The second item has a correlation of 20% with a transaction count of 150. The higher count value for the second upsell item indicates that its correlation is less likely to be coincidence. Wolfe decides that the second item is a better item for upsell.

To upsell from a customer record:

1. Go to Leads > Relationships > Customers.
2. Click View next to the name of the customer you want to upsell to.
3. Click the Sales subtab.
4. Click the Upsell subtab.
   This subtab shows a list of items, their correlation and a count of transactions in which the two items appear together.
5. Click the Create Opportunity button.
   A new opportunity opens with the customer selected automatically.
6. Click the Items subtab.
7. Click Upsell Items.
8. In the Upsell Items popup, check the boxes next to the items you want to upsell to the customer.
9. Click Submit.
   These items are added to the opportunity.
10. Add additional items and enter other information on the opportunity.
11. Click Save.

Now that an opportunity has been created for these items, your sales team can negotiate the offer with the customer.

Note: To maintain optimal NetSuite performance, it is strongly recommended that you set upsell preferences at Setup > Marketing > Upsell Preferences to limit the number items that are shown. These limited items appear on the Upsell subtab of the customer record and the Upsell Items popup on transactions.

Upselling on Transactions

When you enter an estimate, sales order, cash sale, invoice or opportunity, you can view a list of upsell items.

This Upsell Items popup lists items and item categories that have historically sold well with the items on the transaction.

Each upsell item is shown with correlation and count values to help you determine the best upsell candidate. An upsell item’s correlation is the percentage of customers that purchased both the upsell item as well and the items you selected on the transaction. The count displays the number of transactions in which the items are purchased together.
For example, a sales rep creates a sales order for a new laptop computer system. After selecting the laptop on the Items subtab, they click the Upsell Items button. At the top of the Upsell Items list, they see that 13% of transactions that include this model of laptop also include wireless routers. They ask the customer if they are interested in a router and add it to the order.

**Note:** NetSuite searches for correlation on each item separately when searching for potential upsell items.

To choose an upsell item on a transaction:

1. Create a new sales transaction.
2. On the Items subtab, add at least one item to the transaction.
3. Click Upsell Items.
4. In the Upsell Items popup, check the boxes next to the items you want to upsell to the customer.
5. Click Submit.

The item is added to the transaction.

**Note:** To maintain optimal NetSuite performance, it is strongly recommended that you set upsell preferences at Setup > Marketing > Upsell Preferences to limit the number items that are shown. These limited items appear on the Upsell subtab of the customer record and the Upsell Items popup on transactions.

## Upsell Preferences

Before you begin using the Upsell Manager, set the following preferences at Setup > Sales > Upsell Preferences:

- **Items to Upsell** – When you are upselling from transactions or from the customer record, a list of possible upsell items is shown. This list of items can be generated based on item correlation or from related items. Upsell items are items that have positive correlation with previously purchased items. Related items are items that have been manually selected on the Related Items subtab of item records.

  You can choose from the following:

  - **Show Upsell Items and Related Items** – Both related items and items with correlation show on the Upsell subtab and in the Upsell Items popup.
  - **Show Upsell Items If There Are No Related Items** – Related items are shown on the Upsell subtab and in the Upsell Items popup. If there are no related items, items that correlate with past purchases are shown instead.
  - **Show Only Related Items** – Only related items show on the Upsell subtab and in the Upsell Items popup.

- **Minimum Correlation** – When suggesting upsell items, NetSuite presents a correlation value for each pair of items.

  Correlation is the percentage of customers that purchased the upsell items and each item in your upsell search results. Enter a minimum correlation to:

  - filter the suggested upsell items on the Upsell subtab of customer records and on the Upsell Items popup on transactions
Upsell Preferences

- appears by default in the Correlation Greater Than field on the Select Upsell Items page when using the Upsell Manager

- **Minimum Lift** – Lift is the degree to which the item’s correlation exceeds its overall purchase frequency. Lift helps you filter out basic items that are sold in a large percentage of transactions. A high lift implies a more reliable correlation. For example, for an electronics dealer might notice that CD-Rs have very low lift since they are sold in many transactions with unassociated items.

Enter the degree of lift that:

- is used to filter items on the Upsell subtab of customer records and on the Upsell Items popup on transactions
- appears by default in the Lift Greater Than field on the Select Upsell Items page when using the Upsell Manager

- **Minimum Count** – Count represents the number of customers that have purchased the upsell items and each item in your upsell search results. Enter the count that:

- is used to filter items on the Upsell subtab of customer records and on the Upsell Items popup on transactions
- appears by default in the Lift Greater Than field on the Select Upsell Items page when using the Upsell Manager

After you set these preferences, click Save.

Limits on Upsell Manager Data

The amount of upsell data that is stored on your account depends on how many items or customers you have. The larger of these two values is used to determine your allocation. Examples of allocations are given in the table below, along with an explanation of how NetSuite calculates larger-sized accounts.

<table>
<thead>
<tr>
<th>Number of customers / items</th>
<th>Number of correlations / recommendations allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;2000</td>
<td>100</td>
</tr>
<tr>
<td>5000</td>
<td>40</td>
</tr>
<tr>
<td>10000</td>
<td>20</td>
</tr>
<tr>
<td>25000</td>
<td>8</td>
</tr>
<tr>
<td>50000</td>
<td>4</td>
</tr>
<tr>
<td>100000</td>
<td>2</td>
</tr>
</tbody>
</table>

For accounts with more than 2000 items or customers, NetSuite calculates the maximum number of correlated items and customer recommendations by:

1. Looking at the number of items or customers you have in your account and using the larger of these two values (e.g. 4500 customers).
2. Dividing this number by 2000* (e.g. 4500 / 2000 = 2.25).
3. Dividing 100** by the figure above (e.g. 100 / 2.25 = 44).
4. This figure is the number of correlated items and customer recommendations you are allocated (e.g. an account with 4500 customers is allowed 44 recommendations per customer and 44 correlations per item)
* the customer/items threshold.
** the correlations/recommendations threshold.

**Note:** The upsell data for accounts exceeding 2000 customers/items is updated weekly.

**Product Affinity Analysis in Search**

You can use upsell data in item search results. This allows you to create reports and saved searches that give information on customer purchasing patterns.

The following fields are available as criteria or as result columns:

- **Correlated Item** - this includes all of the items that have been purchased by the same customer as a certain item.  
  (Correlation is the percentage of customers who have purchased both the correlated item and the upsell item.)
- **Correlated Item Count** - this is the number customers who have purchased both the upsell item and the correlated item
- **Correlated Item Lift** - this is the lift between the upsell item and the correlated item  
  (Lift is the difference between the correlation and the purchase rate of the correlated item, or the percentage of customers who have purchased a certain item.)
- **Correlated Item Purchase Rate** - this is the percentage of customers who have purchased the correlated item
- **Correlated Item Fields** - this field group includes all of the fields on the item record of the correlated item

The information in these fields is updated according to the number of items or customers you have. For more information, see Limits on Upsell Manager Data.