

# Marketing Automation



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# Table of Contents

Marketing .....	1
Marketing Automation Overview .....	2
Capturing Leads .....	5
Lead Sources .....	5
Creating Online Customer Forms .....	5
Passing Parameters Through URLs .....	7
Tips for Passing Parameters Through URLs .....	10
Tracking Lead Sources for Web Store Visitors .....	11
Lead Reports and Analysis .....	11
Lead Source Reports .....	11
Managing Campaigns .....	13
Campaign Categories .....	13
Creating a Campaign Record .....	14
Scheduling Campaign Events .....	15
Campaign Events .....	16
Campaign Channels .....	16
Campaign Event Status .....	17
Initiating Campaign Events .....	17
Campaign Metrics .....	18
Tracking Campaign Revenue .....	18
Tracking Campaign Responses .....	19
Bounced Email .....	22
Mail Merge vs. Email Campaigns .....	22
Creating Target Groups for Campaigns .....	23
Marketing to Contacts .....	23
Campaign Calendar .....	25
Tips for Campaigns .....	25
Email Marketing Campaigns .....	27
Email Campaign Checklist .....	27
Email Best Practices .....	27
Optimizing Email Campaigns .....	29
Subscription Management .....	32
Setting Up Campaign Subscriptions .....	34
How Customers Opt In to Marketing Campaigns .....	35
Opt-In Email .....	35
Sending Subscription Messages .....	36
Campaign Subscription Categories .....	38
Campaign Email Domains .....	39
Creating a Campaign Email Address Record .....	40
Marketing Templates .....	41
Email Marketing Templates .....	41
Creating an Email Marketing Campaign .....	45
Creating Email Campaigns Using the Campaign Assistant .....	47
Lead Nurturing Campaigns .....	52
Configuring Your Lead Nurturing Workflow .....	52
Creating a Lead Nurturing Campaign .....	53
Sending Newsletters Through Email Campaigns .....	53
Marketing Test Cells .....	54
Attaching Files to Email Campaigns .....	55
Using the Sent Email List .....	55
Managing Bounced Email .....	60
Troubleshoot Undelivered Email .....	60
Undelivered Emails Saved Search .....	61

Invalid Email Address Notification .....	61
Mass Unsubscribing Entities with Bounced Email Addresses .....	62
Viewing the Bounced Email Address List .....	63
Paid Search Marketing .....	65
Creating Keyword Campaigns in Bulk .....	66
Importing Keyword Campaigns .....	66
Naming Keyword Campaigns .....	67
Exporting Keywords .....	67
Submitting Your Paid Search Proposal .....	67
Campaign Families .....	68
Upsell Manager .....	69
Using the Upsell Manager Wizard .....	69
Upselling From Customer Records .....	73
Upselling on Transactions .....	74
Upsell Preferences .....	75
Limits on Upsell Manager Data .....	76
Product Affinity Analysis in Search .....	76

# 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 provides instruction 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 can 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, customer), and designate which URL the record is taken to after form submission.

Avoid the creation of duplicate lead records to ensure that NetSuite accurately tracks lead generation. 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. NetSuite does not create a new record.

Each lead is assigned a lead source that indicates which campaign generated the lead. You should maintain this lead source information to tie revenue to campaigns. Accurate lead source information provides analysis into which campaigns produce the most leads.

For more information on lead generation, see [Capturing Leads](#).

## Manage Campaigns

Managing marketing campaigns has never been easier. With a few 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 information on setting up your campaigns to maximize visibility into key marketing metrics, see the help topic [Campaign Overview](#). For tips to carry out different kinds of campaigns, see [Managing Campaigns](#).

## Email Campaigns

NetSuite uses templates that you can create and customize to generate campaign email. CRM SDK 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, you can use keyword campaigns to determine how customers find your website. Common internet search engines include Google Adwords and Yahoo Sponsored Search.

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

Keyword campaigns track the paid keywords, search engines, and target audience. These campaigns also track 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.

The Upsell Manager measures the correlation between the items that customers purchase. It then provides a list of customers, and an item or set of items they might purchase. 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 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, pass the lead source in the URL. When you pass the lead source in the URL, the new lead is properly attributed to the lead source. For more information on passing parameters in URLs, read [Passing Parameters Through URLs](#).

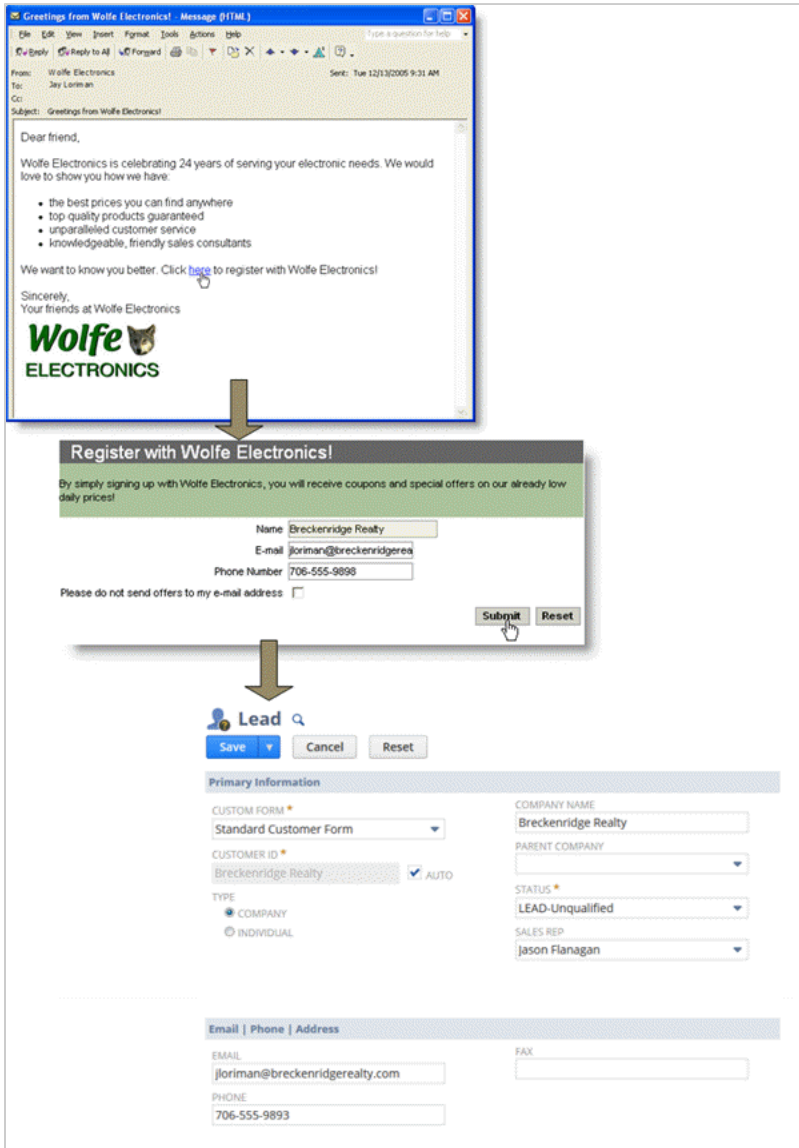
If you import a list of leads through smbXML or CSV import, you can include the lead source in the imported file. When you include the lead source in the imported file, you know where these leads originated.

For letter campaigns and other campaign channels, you can manually track which campaign brought a customer to your company. To manually track the campaign, select 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, NetSuite creates a new lead record.

When you use online customer forms in conjunction with your marketing campaigns, you capture new lead information and report on the effectiveness of campaigns.



### To create an online lead capture form:

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

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

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

5. Click **Add**.
6. Repeat these steps for each field you want to appear on the form.
7. Click **Save**.

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

If this online form is used for a single campaign, 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.

Check the **Allow Update** box next to the **Set Lead Source** field. Now, 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. When you do this, you know the source of the new lead or customer. You can also use parameters when you create links for paid search campaigns.

When a customer follows a link to an online customer form and submits the form, NetSuite creates a new lead, prospect, or customer record. If you include parameters in the link to the form, NetSuite includes this information 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 NetSuite creates.

You can find a form's URL in the Publishable Form URL field on the External subtab of the online customer form record.

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:

```
1 | 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.

Field	Parameter
Campaign Event***	&campaignevent=187

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

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

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

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

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

```
1 | 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 transfers to your online customer form. The Partner field has the partner's name automatically entered.

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

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

## Custom Field Parameters

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

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

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

```
1 | https://system.netsuite.com/app/site/crm/externalleadpage.nl?compid=ACCT000000&formid=1&h=1bdc80a058&custentity1=industryperiodical
```

Custom check box fields follow the following format:

```
1 | https://system.netsuite.com/app/site/crm/externalleadpage.nl?compid=ACCT000000&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 NetSuite does not host your site, you must include Javascript in the code of your web pages. Javascript enables parameters to pass 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.

```
1 | <script type="text/javascript">
2 | <!--
3 | function getNS_url_param( name ){
4 | name = name.replace(/[\/, "\\\[ ]"/, "\\[ ]/");
5 | var regexS = "[\\?&]" + name + "=[^&#]*";
6 | var regex = new RegExp( regexS );
7 | var results = regex.exec( window.location.href );
8 | if( results == null )
9 | return "";
10 | else
11 | return results[1];
12 | }
13 | function trackNSParams() {
14 | var name = 'leadsource';
15 | var value = getNS_url_param(name);
16 | if (value != null && value.length > 0)
17 | document.cookie = name+"="+value+"; path=/";
18 | }
19 | function appendNSParams(url) {
20 | var nameEQ = "leadsource=";
21 | var ca = document.cookie.split(';');
22 | for(var i=0;i < ca.length;i++) {
23 | var c = ca[i];
24 | while (c.charAt(0)==' ') c = c.substring(1,c.length);
25 | if (c.indexOf(nameEQ) == 0 )
26 | url = url + '&' + nameEQ + c.substring(nameEQ.length,c.length);
27 | }
```



```

28 | return url;
29 | }
30 | //-->
31 | trackNSParams();
32 | </script>

```

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

```

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

```

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

```

1 | <a href="#" onclick="document.location.href=appendNSParams(https://fozms.netsuite.com/app/site/crm/externallead
2 | page.nl?compid=1234567&formid=3&h=ed62a43be13c70de335b)">Contact Us

```

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

For more information on URL Parameters, see [Tips for Passing Parameters Through URLs](#) and [Website URL Parameters](#)

## 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. 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:

```

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

```

- You must spell and capitalize campaign IDs, partner names, and partner codes passed in the parameter 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:

```

1 | https://system.netsuite.com/app/site/crm/externalleadpage.nl ?compid=ACCT000000&formid=1&h=1bdc80a058?partner=Wilson%20 Comput
  | ers&leadsource=March%202010%20Flyer

```

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

- Replace any spaces in your URLs with **%20**
- You may want to pass information into hidden fields on your online customer forms. Information in a hidden field saves to the customer record when the online form is submitted. However, the person filling out the form cannot see the field.

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 banner ads and paid search results, leads are directed to landing pages in your website, rather than online forms. Tracking lead source and other information differs depending on whether you are using a NetSuite hosted site or a third party hosted site.

If you use 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, NetSuite maintains this lead source for that visitor. When the visitor registers through your website, NetSuite saves the lead source in the customer record created by registration. NetSuite maintains this information even when the visitor leaves your site and returns later. NetSuite passes the lead source to the customer record if the visitor submits an online customer form. NetSuite does this even if the Lead Source field is not on the form.

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

**<http://www.yourSite.com?leadsource=yourCampaign>**.

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

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

## Lead Reports and Analysis

NetSuite provides a full range of tools that 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

You use campaign records 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.

You can also use campaigns 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. You can also measure the return on investment for a 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 run.

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

NetSuite includes the following categories and subcategories, 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 appears in the Lead Source field. This field is on the record NetSuite creates if there is no other lead source associated with this customer.

5. Check the **Available Externally** box to make this campaign category available for customers to select on online forms.
6. Click **Save**.

NetSuite tracks campaign categories on the **Marketing** subtab of customer records. Lead sources passed through links on online forms display the campaign's category on the customer record created when the customer submits the form.

## Creating a Campaign Record

NetSuite uses campaign records to manage the information important to your marketing efforts. On campaign records, you set the time and date events are sent. You select the recipient groups and enter the overhead cost. You can also 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:
  - a. 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.
  - b. Enter a title for this campaign.
  - c. Select the category this campaign belongs in.
  - d. Select a campaign manager for this campaign.
 

The campaign manager receives confirmation that email campaign events have been sent.
  - e. Enter or pick the start date and end date for this campaign.
  - f. 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.
  - g. In the **Expected Revenue** field, enter the amount of revenue you expect this campaign to generate.
  - h. Enter the URL for the campaign landing page or online customer form associated with this campaign.
  - i. Enter a description.
3. Under Related Information:
  - a. In the **Vertical** field, select a marketing vertical related to this campaign.
 

For more information, see the help topic [Campaign Verticals](#).
  - b. 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](#).

- c. Select the items associated with this marketing campaign.
- d. If you want to associate an offer with this campaign event, select that offer.
- e. 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
- 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 this event is an email or direct mail campaign event, select the template for the email or direct mail in the **Template** column.

If you use the **CRM Template Categories** feature, you can select a category in the **Template Category** column to filter the list of templates.

5. Enter a title for this campaign event.

In the **Subscription** column, the subscription category for the selected template 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 subscription different from the default for this template.

6. In the **Channel** column, choose the method used to deliver this event.
7. Enter the cost incurred by this campaign event.

When you enter a cost, you can track return on investment (ROI) for the campaign. The **Total Cost** field at the top of the page shows the sum of the base cost plus the cost of each campaign event.

8. In the **Status** column, select the status of the campaign event.

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

- 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 execute.

- Leave the field **Internal ID** empty.

When you save the campaign, NetSuite generates a number for this field. This internal ID appears in forms as **Event ID** or **Campaign Event**, so that you can track event responses.

INTERNAL ID	TARGET GROUP *	TEMPLATE CATEGORY	TEMPLATE *	TITLE *	SUBSCRIPTION *	CHANNEL *
	California Customers	- All -	Impressive Promotion	It's the most powerful personal computer you've ever seen...	Marketir	E-mail

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

## Campaign Events

You can use campaign events when a single marketing campaign has several distinct phases or channels. NetSuite tracks events 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. Another use for campaign events is when you generate a campaign message, such as when you use the Mail Merge feature to print letters. You can schedule the time and date of a campaign event and track its progress on the campaign record.

For example, Wolfe Electronics has a yearly sale in the spring. The Marketing Administrator creates a marketing campaign to manage the sales drive and to track the revenue generated.

- A flyer sent through the mail to all customers
- An advertisement in a local newspaper
- An email message sent to customers who purchased during last year's sales event

**Note:** Keyword campaigns should not have individual events. Each keyword you purchase should have its own 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.


NetSuite tracks campaign events for different channels on the Events subtab on the campaign record. Separate subtabs track campaigns in each channel: Email, Direct Mail, and Other.

To create new campaign channels, go to 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** – Use this status to indicate that the event is in the earliest stage.
- **Planning** – Use this status to indicate that the event is in preparation or delivered, but not complete.
- **Execute** – Use this status for email campaign events.  
When you set an email campaign event to **Execute**, NetSuite will send the email on the specified date and time.
- **Sent** – Use this status to indicate that a campaign event is complete and was delivered to the recipients.  
NetSuite automatically sets email campaign events to **Sent** after the system generates and sends the email.
- **Failed** – Use this status to indicate that a NetSuite could not send the campaign event.  
The most common reason for a failed campaign is when you exceed your monthly email allotment. Do not use this status for campaign email events that were successfully sent but not delivered due to external issues. For example, in cases that involve invalid email addresses, or problems with the recipient's email server.

 **Note:** 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 NetSuite tracks.

## Initiating Campaign Events

After you create the campaign record, you should immediately set campaign events to execute. This is especially important for email campaigns. When you set an email campaign event status to **Execute**, NetSuite generates and sends your email messages at the date and time you specify.

### 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 the event you want to execute.
3. In the **Status** column, select **Execute**.
4. Select the date and time you want NetSuite to send the event.

 **Note:** You cannot change the time of day NetSuite should send an email campaign event on the day it is scheduled to be sent.

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



When NetSuite sends email, you receive email notification that the event executed, and the event status displays **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 campaign event status to **Sent**.

## Campaign Metrics

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

Metric	Description	Relevant Reports
<b>Return on Investment (ROI)</b>	Calculating ROI requires that you enter the cost of each campaign or campaign event.	Campaign ROI Analysis Summary & Detail
	Transaction revenue is attributed to a campaign when the campaign is selected on the transaction record.	Sales by Paid Keyword Summary & Detail
		Sales by Lead Source Summary & Detail
<b>Lead Source</b>	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 Analysis Summary & Detail
	NetSuite tracks the Lead source in the Lead Source field on lead, prospect, customer, and contact records.	Gross Lead Source Analysis Summary & Detail
	For information on lead sources, see <a href="#">Lead Sources</a> .	Leads by Paid Keyword Summary & Detail
<b>Campaign Response</b>	You can track campaign responses automatically for email campaigns.	Campaign Response Summary & Detail
	You must manually indicate each recipient's response to campaigns that use non-email channels.	

## Tracking Campaign Revenue

When you select a campaign in the Lead Source field on a transaction, NetSuite ties the transaction's revenue to the campaign.

Before you send your first campaign, you should set the Default Lead Source on Sales Transactions preference. Go to Setup > Sales & Marketing Automation > Set Up Marketing. This preference determines which campaign displays 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 first campaign sent to the customer displays, by default.
- **Most Recent Campaign Sent** – The campaign event most recently sent to the customer displays, by default.
- **First Campaign Responded To** – The first campaign the customer responded to displays, by default.
- **Most Recent Campaign Responded To** – The campaign most recently responded to by the customer displays, by default.
- **Based on Lead Source** – The lead source on the customer record displays, by default.

NetSuite sets this preference 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, see [Passing Parameters Through URLs](#) and [Tracking Lead Sources for Web Store Visitors](#).

## Cost and ROI

You measure return on investment (ROI) when you compare 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 includes 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 displays in the Total Cost field.

When orders include lead sources, NetSuite ties the sales revenue to your campaigns. NetSuite then calculates ROI 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. You can view these responses 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 did one of the following:
  - Replied to the From address on the campaign email message
  - 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** – NetSuite sent the campaign.

You can also track the following responses to email campaigns:

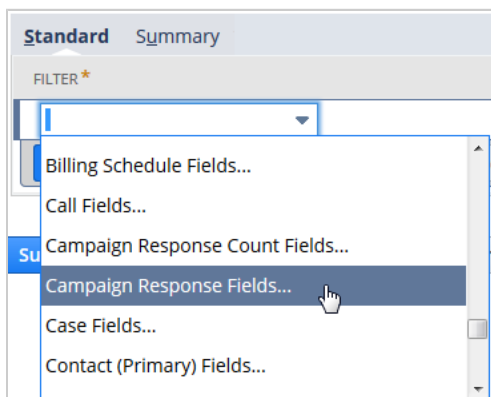
- **Queued** – The email is in a queue to be sent but has not yet been sent.
- **Opened** – The recipient opened the email message.
- **Clicked Thru** – The recipient opened and clicked a link in the email message.

 **Note:** NetSuite tracks recipient response data only for links to NetSuite pages. For example, NetSuite tracks a link to a page in your NetSuite website, but not a link to a third-party site.

- **Failed - delivery failure** - NetSuite sent the email, but it could not be delivered.
- **Failed - invalid address** – Email delivery failed due to an invalid email address. This is also known as a hard bounce. For more information on managing hard bounces, see [Managing Bounced Email](#).
- **Failed - miscellaneous delivery failure** - Email delivery failed due to a miscellaneous delivery error.

- **Failed - spam** – The email was marked as spam by the recipient or the recipient's content filter. This is considered a soft bounce.
- **Failed - delivery failure** – Network issues out of NetSuite's control prevented email delivery. This is considered a soft bounce.
- **Failed - other** – The email was not delivered due to 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.

You can find additional information in the Note field of the campaign response. You can include these descriptions in searches or reports. On reports, you can add the Comment field as a column or filter. To include these responses in searches, use the Response Comments field in the Campaign Response fields.



**Note:** NetSuite tracks email campaign responses automatically if you check the Track Outgoing Email box on the marketing template record. When a recipient opens and clicks through the email, NetSuite records the response. 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. Updates are also delayed based on the rate at which the recipient's email servers accept your email. As NetSuite receives data, it updates statistics every two hours on reports and on the Statistics subtab of campaign records.

NetSuite no longer uses the following campaign responses, but tracks them on older email campaign events. These responses are also available to searches and 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
- 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 the way 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**.

NetSuite tracks the response history for each campaign including 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. Click Actions, and then 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](#).


In addition, you can view data on the Statistics subtab of campaign records. This subtab provides cost analysis such as 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, NetSuite returns **Clicked Thru** campaign response whenever an entity clicks any link in the email message. You can see which specific links entities clicked 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. Others can be the result of permanent issues and result in hard bounces. A hard bounce generates the **Failed - invalid address** campaign response.

 **Note:** If an email address generates a **hard bounced** response, NetSuite restricts its inclusion in subsequent campaigns for 30 days or 90 days. The day length depends on whether DKIM and an email domain are set up. Attempts to send to the bounced address before the time elapses results in an unsent message, and the campaign response: **Failed - invalid address**.

You can access all saved searches from Lists > Search > Saved Searches. NetSuite provides the following saved searches to assist administrators who work with bounced email:

- You can also access the Sent Email List from Setup > Company > Communication > Sent Email List. See [Using the Sent Email List](#).
- You can also access the Undelivered Emails from Lists > Mailing > Undelivered Emails. See [Managing Bounced Email](#).
- The Bounced Email Addresses list is more inclusive. 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 five preceding reasons)

### Soft Bounce Reasons

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

For information on excluding email addresses that returned hard bounce responses, see [Choosing Email Recipients](#).

## Mail Merge vs. Email Campaigns

As with marketing campaigns, NetSuite's Mail Merge feature lets you create personalized email in bulk. When you use campaigns for your marketing email, you can track revenue, lead source, and other marketing information for your campaign events.

For campaign events that use a channel other than email, use NetSuite Mail Merge tools. NetSuite Mail Merge tools 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 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 then select **Customer** in the list.

3. Click **Continue**.
4. On the Create Dynamic Customer Group page, enter a name for your group.
5. Next to the **Saved Search** field, click **New**.
6. In the New Saved Search popup window, select what you want to base your customer group on. You can base a customer group on searches for transaction and case criteria in addition to customer criteria.
7. Enter the criteria customers must meet to be included in this group.
8. Click **Save**.
9. On the Create Customer Dynamic Group page, in the **Comments** field, enter a description of the group.
10. Check the **Private** box, if you want to be the only one to use this group.
11. In the **Restrict To** field, select the employee group you want to grant access to this group. For example, you can select a group of marketing reps 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 your customer base, you may prefer to send your marketing campaigns to contacts, rather than the customer for whom they work. You can create a target group of contacts based on the characteristics of the customer who employ them.

The Wolfe Electronics marketing manager plans to send email messages to let customers know about a summer sales promotion. Rather than send the email to the customer's company email address, the

marketing manager sends it to their primary customer contacts. This email includes a coupon code that they can use when they place an order. The marketing manager creates a new customer search that filters 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 in the same manner 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. 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. Check the **Use Advanced Search** box.
3. Click **Create Saved Search**.
4. On the **Criteria** subtab, set criteria based on customer fields.

5. After you set the customer criteria, click **Save**.
6. Go to Campaigns > Marketing > Groups > New.
7. On the Create Group page, choose **Dynamic**, and then 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 revenue as if the event targeted the customers the contacts work for.

After contacts review the marketing email, they place orders on behalf of their employers. As orders are placed, Wolfe sales reps enter the campaign's coupon code on the order. Later, the Wolfe marketing manager can view the Campaign ROI Analysis and Sales by Promotion reports to determine the success of the campaign.

When contacts submit online customer forms, NetSuite tracks the submissions on the Online Forms subtab on the contact record. NetSuite displays the online form's name, contact's company, and lead source that generated the form submission, for each submission. NetSuite also displays the submission on the Online Forms subtab of the customer record associated with the contact.

## Campaign Calendar

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

## Tips for Campaigns

Following is information to help you manage two common marketing scenarios: direct mail and imported leads lists.

### Direct Mail

To ensure a successful direct mail campaign, the campaign should be recorded on the customer record and on the sales transaction.

When you link a direct mail campaign with revenue, the sales rep must manually select 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. Do one of the following:

- **For CSV imports** – In the **Lead Source** column, paste the name of the campaign you use 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, you can link the revenue generated by these leads to the campaign. See [Tracking Campaign Revenue](#)

To track revenue for imported leads, use the Default Lead Source on Sales Transactions preference. Go to Setup > Sales & Marketing Automation > Set Up Marketing. In the Default Lead Source on Sales Transactions field, select **Based on Lead Source**. When sales reps enter transactions for a customer with this lead source, NetSuite defaults the campaign event on the transaction. Now you can 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 NetSuite, they create a campaign titled Summer 2019 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 and determine which email campaigns produce the most leads. You can also 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. 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](#).

You can also use email campaigns 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](#).

NetSuite generates campaign email from HTML templates you create. You can personalize these templates 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

Best practice includes the use of industry-standard email authentication through DomainKeys Identified Mail (DKIM) and campaign email domains. Best practice also includes the careful maintenance of recipients lists 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 offers tips for optimizing your email campaign delivery.

Five Golden Rules For Outbound Email		
<b>1</b>	<b>Always send using a FROM domain you control</b>	<ul style="list-style-type: none"> <li>■ Do not send email messages on behalf of customers, and never use customer email addresses in the FROM field.</li> <li>■ Never send from addresses using a DNS record you don't control.               <ul style="list-style-type: none"> <li>□ For emailed forms, or email messages related to transactions, ensure that the <b>Return Email Address</b> field in <a href="#">Setting Email Preferences</a> is specifying your domain.</li> </ul> </li> </ul>

		<ul style="list-style-type: none"> <li>▫ For campaign email messages, see <a href="#">Campaign Email Domains</a>.</li> </ul>
2	<b>Manage Your Scripts</b>	Regularly check your SuiteScript outbound mail scripts. Promptly delete any obsolete scripts or deprecated customizations.
3	<b>Be Compliant</b>	<ul style="list-style-type: none"> <li>■ Ensure you have proper DNS records set up for DKIM on the domains you send email from. See the help topics <a href="#">DomainKeys Identified Mail (DKIM)</a> and <a href="#">DomainKeys Identified Mail (DKIM) and Email Domains</a>.</li> <li>■ Consider setting up a DMARC policy record for your company's entire email infrastructure. See <a href="#">Domain-based Message Authentication, Reporting and Conformance (DMARC)</a>.</li> <li>■ For NetSuite purposes, it is not 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 <a href="#">Sender Policy Framework (SPF)</a>.</li> </ul>
4	<b>Be Aligned</b>	If you have an email relay between NetSuite and your mailbox provider (where the MX points), ensure the MAIL-FROM (ENVELOPE-FROM, RETURN-PATH) passes the SPF check.
5	<b>Be Hygienic</b>	<ul style="list-style-type: none"> <li>■ Never send spam or unwanted email.</li> <li>■ Never send single email more than a single time.</li> <li>■ Always honor unsubscribe requests.</li> <li>■ Do not send or forward email with content (especially attachments) that is unknown to you.</li> </ul>

For an overview of the processes marketing administrators can use to ensure your company's campaigns are reaching their audience effectively, see [Optimizing Email Campaigns](#).

## 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 you set up your account. For more information, see the help topic [Setting Email Preferences](#). Best practice is the domains implied by both the **Campaign Email Domains** configuration and **Setting Email Preferences** should be those 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. 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)

A domain administrator can use DMARC to 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. This validation ensures that the email message was 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 received reports.

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

## Sender Policy Framework (SPF)

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

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

An SPF record is a TXT record using the SPF format with your DNS provider. An SMTP server on the receiving end determines (based on the content of the DNS TXT record) whether the IP address the email message is sent from is approved for that domain. 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 a reference to NetSuite SPF in the configuration of your email system, use the domain `sent-via.netsuite.com`.

**Note:** Do not attempt to manage access to NetSuite by adding a list of NetSuite IP addresses to an access control list. Rather than using a list of allowed IP addresses, there are better, more secure, and less fragile methods to protect your account from unauthorized access. For more information, see the help topic [NetSuite IP Addresses](#).

## Optimizing Email Campaigns

NetSuite provides 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 the recipient has agreed to receive it. For example, email sent to a list purchased from a third party is considered spam.

You can 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.

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

NetSuite email policies abide by the standards set by the Messaging Anti-Abuse Working Group (MAAWG), of which Oracle 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, NetSuite complies with UK law. NetSuite includes the name of your business address and VAT number 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. Recipients whose email addresses have domains that are listed on the [Federal Communications Commission \(FCC\) Web site](#) 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:** Some jurisdictions have regulations regarding whether you can contact entities if you do not have their explicit permission to do so. For example, the European Union (EU). 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 (email merge), or more than 100,000 bulk email per month.

If you have DKIM set up, there is no limit to 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 create 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 send email campaign messages only to:

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

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

Before you add 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. NetSuite does not send email to those addresses for a designated period of time. For more information, see [Managing Bounced Email](#).

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

Select the right group of recipients is important in to ensure that your email is delivered quickly and successfully. When you create a target group with search criteria, consider adding the following criteria to the other criteria you use to select your recipients:

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

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

You can send email campaigns to recipients with the status of Soft Opt-In. However, 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 use the **Remove email addresses from Bounced Email Addresses list** preference, these email addresses are not sent email. However, when you add this criterion you do not incur a charge for these messages.

- **Campaign Response Fields...: Campaign Response Filter: Response** is none of **Failed - spam**

This criterion filters recipients who have flagged your email as spam.

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 uses your email history to determine whether your email meets 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.

When you maintain a positive sender reputation, your email campaigns receive 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. However, letting recipients subscribe can increase the deliverability of your email.

You can invite your customers to opt in by going to Campaigns > Other > Mass Updates. Under the Marketing heading, select the Send Subscription Message update you want to perform. For more information, see [Opt-In Email](#).

- Only send campaign email to customers who have purchased from you or responded to prior campaigns. For tips on creating recipient groups, see [Choosing Email Recipients](#).
- Set up a campaign email domain.
- Set up domain key identified mail (DKIM).

## Subscription Management

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

Email message you send through email campaigns or email merge operations contains a message in the footer with a link and instructions to unsubscribe. 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 subscribes to your marketing campaigns, NetSuite assigns 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 spam by ISPs.

- **Soft Opt-In** - Recipients with this status receive all email marketing campaigns received by recipients with the **Confirmed Opt-In** status. They also receive opt-in messages that enable them to confirm whether they want to receive the email campaigns.

Recipients cannot set their own status to **Soft Opt-In**. You can set this status in 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**, NetSuite unsubscribes the recipient 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 through the Customer Center. They can also click the link in a campaign message they received prior to opting out.

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

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

**Note:** Certain jurisdictions have regulations regarding whether you can contact entities if you do not have their explicit permission to do so. For example, the European Union (EU). You should check that your global subscription status adheres to the regulations in the recipient's jurisdiction.

NetSuite tracks subscription status in the **Global Subscription Status** field on each record. This field is located in the Subscriptions subtab of the Marketing subtab. 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, NetSuite maintains the subscription statuses from the master record 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. NetSuite uses saved searches to build these lists, and lists can apply to both customers or contacts. A list of the most commonly used filters is as follows. For more information on creating saved searches, see the help topic [Saved Searches](#).

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

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



## Setting Up Campaign Subscriptions

The first step to manage campaign subscriptions in NetSuite is to set the Unsubscribed to Marketing by Default preference. Go to Setup > Sales & Marketing Automation > Marketing Preferences. This preference determines whether new records are subscribed or unsubscribed, by default. You can set the preference by checking the Unsubscribed to Marketing by Default preference box:

- If you check the preference box, NetSuite automatically assigns new leads, prospects, customers, and other records you create the Soft Opt-Out subscription status by default.
- If you do not check the preference box, NetSuite assigns new records the Soft Opt-In status. Ensure you provide appropriate notice and obtain consent to automatically subscribe new and existing entities to 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. Categories permit 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 communication 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 a recipient unsubscribes, no one in your company can resubscribe them. Recipients cannot be resubscribed manually on the entity record, or through updates made through CSV import. 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. Best practice is 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 tabsub. 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. Entities can also 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. When they click this link, the Campaign Subscription Center opens.



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. Choose the font, font size, and text alignment you want to apply to the footer text.



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

## Opt-In Email

There are two subscription messages you can send to your customers to let 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. Best practice is 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 subtab. For more information, see [Viewing List of Subscription Messages Sent to a Recipient](#).

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

## Opt-In Invitation Email

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

If you use 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](#).

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

## Opt-In Confirmation Email

You can send confirmation email to customers to let them confirm their current subscription status. This email specifically provides an opportunity for your customers to reaffirm their interest to receive your email. Opt-in confirmation messages assure your customers that you are committed to sending them only the email they want to receive.

If you use 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](#).

To use a new email template that you create as the confirmation email, go to Setup > Marketing > Preferences > Marketing Preferences. Select it from the Opt-In Confirmation Message list.

## Sending Subscription Messages

You can send subscription messages to a large group of recipients, or to individual recipients.

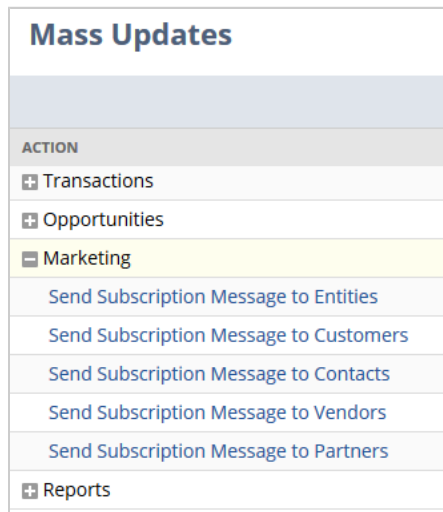
You should avoid repeatedly sending subscription email because the recipients may consider it spam.

Certain jurisdictions have regulations regarding whether you can contact entities if you do not have their explicit permission to do so. For example, the European Union (EU). You should check that your global subscription status adheres to the regulations in the recipient's jurisdiction. For information on how to check how many subscription invitation and confirmation email messages have already been sent to an entity, see [Viewing List of Subscription Messages Sent to a Recipient](#).

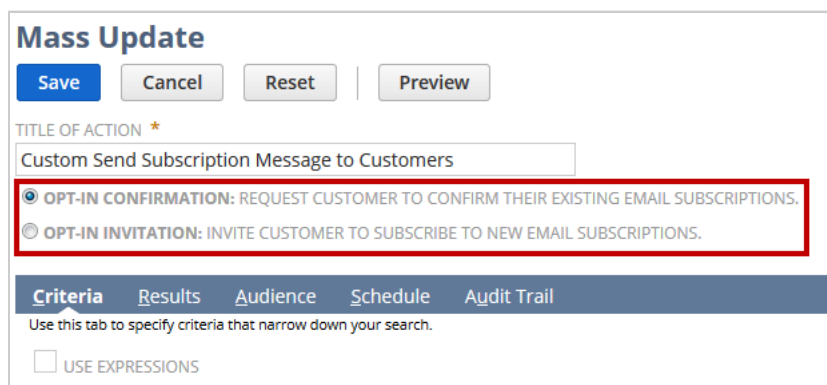
### To send subscription messages to a group of recipients:

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

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



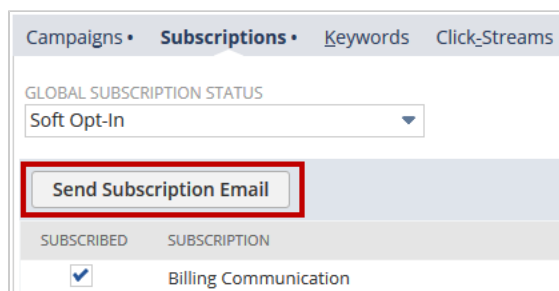
- On the Mass Update page, select the type of message.



- Set the criteria for the recipients you want to receive your invitations, and then click **Save**. NetSuite sends your messages.

### To send subscription messages to an individual:

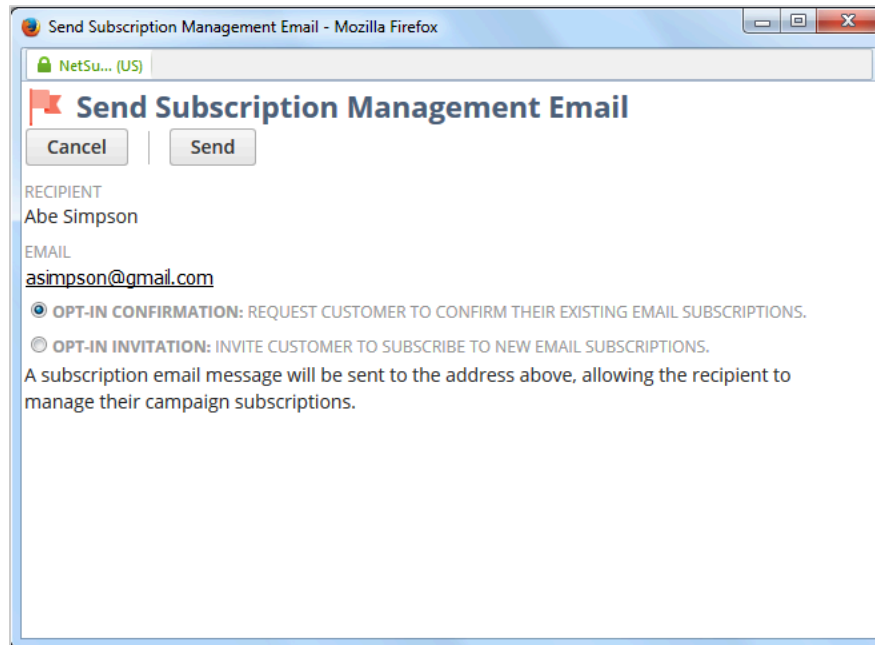
- Open the recipient's record in edit mode.
- Click the **Marketing** tab.
- Perform one of the following:
  - If you use the Subscription Categories feature, click the **Send Subscription Email** button on the **Subscriptions** subtab.



- If you do not use 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), NetSuite prompts you to choose the type of message you would like to send.



5. Click **Send**.

## Viewing List of Subscription Messages Sent to a Recipient

You should avoid sending recipients multiple, repetitive subscription invitation and confirmation messages. You should verify how many of these messages were previously sent before you send another message.

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

1. Open the recipient's record.
2. Click the **Marketing** subtab.
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

The Campaign Subscription Categories feature enables entities with whom you communicate through bulk email to choose which types of campaign communication they want to receive.

When you enable this feature, you can create unique campaign subscription categories in addition to the following default subscription categories:

- Billing Communication
- Marketing
- Newsletters
- Product Updates
- Product Updates

When recipients log in to the Campaign Subscription Center, they 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. When you select a template on a campaign or in an email merge, NetSuite sets this subscription category, by default. Email is sent only 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

To send more than 100,000 email messages through marketing campaigns in a 30 day period, you must set up a campaign domain. Similarly, to send 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:

- [Point your Domain Name at your Domain \(DNS Settings\)](#)
- [Set Up Domains for Web Stores](#)
- [Campaign Email Limits](#)

When you set up a campaign email domain, all links and other references to **netsuite.com** are instead replaced with your domain.



**Important:** 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:** A campaign email domain is different from a 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 must match the domain in your links and tracking pixels return responses.


To set up a campaign email domain, 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. NetSuite uses the CNAME (Alias) domain 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 to send 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 you create a new domain or update an existing domain, **you must wait two hours** before you configure DNS settings with your domain provider. See the help topic [Point your Domain Name at your Domain \(DNS Settings\)](#).

7. After two hours, return to the Domain Setup page, and then copy the **CNAME (Alias)** NetSuite assigned to you. 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 CNAME record setup. See the help topic [Set Up a CNAME Record](#).
9. 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. Go to Setup > Marketing > Set Up Web Site > **Default Campaign Domain** field.

After you set up domain names in NetSuite, and configure 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 two 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 you send 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 you save the email record, NetSuite sends an authorization code 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 included in the email NetSuite sent when you saved the record.
4. Click **Save**.

You can select a validated email address on campaign email templates to serve as the From address, the Reply to address, or both.

After you create a target group, upload an email template, and validate your marketing email addresses, you can create email marketing campaigns.

For more information on creating email campaign templates, see [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 you can create outside of NetSuite. Then you upload those documents 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.



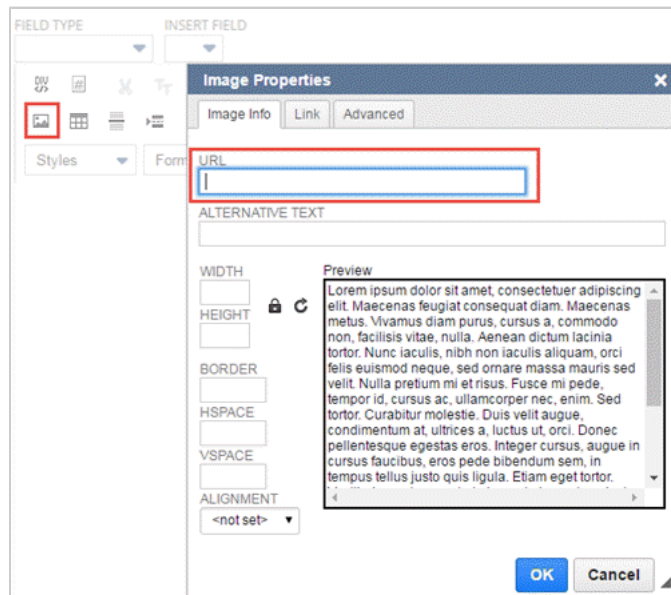
If you create your marketing template outside of NetSuite, you must include the following HTML elements in your template:

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

You can store images in your template in your NetSuite file cabinet. When you use an image file in a template, ensure 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 that 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.



6. In the Image Properties popup window, paste the URL of the image into the **URL** field.
7. Click **OK** to insert the image into the template.
8. When you finish 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.

```

1 <b>Dear <#if Customer.companyName != "">${Customer.companyName}<#else>Customer</if>,</b>
2
3 <p>Now you have unique opportunity to get your favorite items with 20% discount!</p>
4
5 <p>All you need to do is to use the following coupon code when you place an order on our site: ${CampaignEvent.couponCode}!</p>
6
7 <#assign printedOutItems = 0>
8 <#list Customer.correlatedItems as itemLine>

```

```

9   <#if 33 <itemLine.correlation >
10  <br/>
11  </#if>
12  <#assign printedOutItems = printedOutItems + 1>
13  <#if printedOutItems = 3><#break></#if>
14  </#list>
15  <#if 3 <printedOutItems >
16  <#list Customer.relatedItems as itemLine>
17  <br/>
18  <#assign printedOutItems = printedOutItems + 1>
19  <#if printedOutItems = 3><#break></#if>
20  </#list>
21  </#if>
22
23  <p>
24  Best regards,<br/>
25  <br/>
26  ${preferences.MESSAGE_SIGNATURE}
27  </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, NetSuite uses the campaign email template 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 then 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. You might want to include personalized upsell items in a promotional email message.

When you create an campaign email template, the fields you use must match the record type of the members of your target group. NetSuite does not enter fields in the message that do not refer to a field in the recipient's record. For example, you create a campaign email template for customers. You insert a field in the message that refers to the Salutation field. Unfortunately, the salutation does not appear in the message because the customer record has no Salutation field.

Records referenced in a campaign email template must match the group you are targeting with your marketing campaign. If not, the group does not appear in the group column of campaign records.



**Note:** HTML documents uploaded to your file cabinet must include 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 must create campaign email address records. You can use only validated email addresses in your email marketing campaigns. For more information, see [Creating a Campaign Email Address Record](#).

### To create a marketing email template:

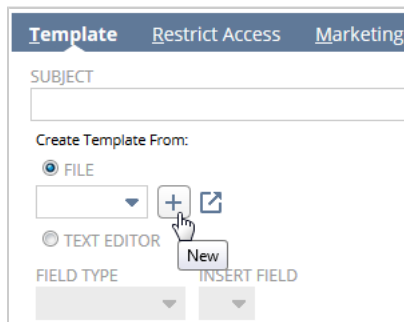
1. Go to Documents > Templates > Marketing Templates > New.
2. On the Select Type page, click **Campaign**.
3. Select the template layout you want to use to design your template.

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, upload a file you prepared outside of NetSuite. You can also 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:
  - Choose **File** if you created the template beforehand, and then 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 then compose your template in the rich text field.
- To insert a field in the template, select the record type in the **Field Type** list. Then, select a field in the **Insert Field** list.

**Note:** If you use the UK Edition, NetSuite complies with UK law. NetSuite includes your business address and VAT number 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 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 features enabled in your account determine the fields shown on the Marketing subtab.

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 to be sent to the sales rep assigned to customer recipients.

When checked, each campaign email shows the nickname and From email address entered by the rep. The rep enters this information at Home > Set Preferences > General, under the User Profile heading. If the rep does not have a profile set up, NetSuite uses the marketing email address and From name entered on the template record.

 **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, NetSuite chooses this campaign subscription, by default. For more information, see [Campaign Subscription Categories](#).

7. To track statistics related to how often this email message is opened or clicked through, check the **Track Outgoing Email** box.

When checked, 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 website or an online customer form would be tracked. However, a link to a third-party site would not be tracked.

NetSuite includes these tracking statistics in reports such as the Campaign Statistics Summary and Detail.

## Categories Subtab

This subtab appears only if you use 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, NetSuite automatically generates an ID.
    - If you do not use auto-generated numbers for campaigns, enter an ID.

You can use campaign IDs to identify campaigns, especially when campaigns share similar names. In addition, you can use campaign IDs when you pass lead source information into online customer forms.
  3. Enter a title for this campaign.
 

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


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

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

You can enter the cost of specific events on the **Events** subtab.
  9. In the **Expected Revenue** field, enter the amount of revenue you expect this campaign to generate.
3. Under the **Events** subtab, click the **Email** subtab.
4. In the **Target Group** column, select the group to receive the campaign email.
5. To test this email campaign and send 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 available only if you have use the CRM Template Categories feature.
7. Select the template for the email in the **Email Template** column.
8. Enter a title for this campaign event.
9. The **Subscription** column displays the subscription category for the template in use. 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.
 

 **Note:** **Execute** instructs NetSuite to your email on the date and time specified in the **Delivery Date** and **Delivery Time** fields.
12. Select the date and time you want this campaign event to occur.

13. 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. A low complaint rate increases 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 omit 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

NetSuite requires the Marketing Automation feature to install Campaign Assistant. An administrator can enable this feature at Setup > Company > Enable Features (Administrator) > CRM subtab.

## Installation

### To install the Campaign Assistant SuiteApp:

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

## Roles and Permissions

The SuiteApp is accessible to the following roles after installation:

- Marketing Administrator
- Marketing Assistant
- Marketing Manager

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

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

## Creating Email Campaigns

To create email campaigns with 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 (Administrator). 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 use an existing target group or 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 automatically change. However, 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 does not appear in the list. Go to Setup > Company > Enable Features (Administrator) and click the **CRM** subtab to enable this feature.

3. For a dynamic group, select an existing saved search from the list, or select **New** to create new search criteria for the target group.

When you select or create a saved search, the criteria used to filter saved search records displays 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:** After you save a new saved search, it is automatically available for selection in the existing saved search list.

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



## Step 3: Selecting the Event Target Group

If you used an existing group in the previous step, select a group from the list. The group properties, member type, and group members display when you make your selection.

If you created a target group, the group type and member type you selected displays in the Create Target Group section.

If you created a dynamic target group, the saved search you created or selected displays its results in the Create Target Group section. These results form the members of your dynamic group.

### To create a target group:

- 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.
- If you created a static target group, in the Group Member section, select the members you would like to add to the target group.
- Click **Add** after selecting each member.  
To delete a member, click the **x** found on the right side.
- Click **Next** to select an event template for this campaign.

**Note:** The target group you created is automatically saved when you click **Next**. This group is then 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 can still view and use them in Campaign Assistant.

### To create an event template:

- Select **New** from the Template list.
- 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.
- In the Template Information section, enter values for the following fields:
  - Subject** – Enter a subject for the email that you send with this template.
  - Create Template From** – Select from the following options:

- **File** – Select this option if you previously created the template. 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 exclusively use the template.
- **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.  
If you enter a cost, you can 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 sends your email on the date and time you set.

 **Note:** You cannot change the time of day an email campaign executes on the day you schedule it for delivery.

- **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 finish 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 you confirm the information, click **Finish** to create your campaign event.

**Note:** When you complete the Campaign Assistant, you will be redirected to a standard marketing page where the campaign you created displays.

## Lead Nurturing Campaigns

Lead nurturing campaigns offer an alternative to traditional email blasts. Sometimes referred to as drip marketing campaigns, these campaigns use a series of targeted messages 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 identified as being in the software industry. One day after the lead record is created, NetSuite uses the marketing template Webinar Invitation: "Trends in Internet Security" to send an email message.

Lead nurturing campaigns can use NetSuite's Workflow Manager. Workflow Manager lets you customize the criteria used to determine who receives each campaign message. You can determine 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 you create a lead nurturing workflow, an administrator must first enable the Workflow feature. Go to Setup > Customization > Scripting > Enable Features > 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 to be 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  
You use this information to create states and transitions in the workflow.
- how much time should pass before you sent each successive email message  
You can implement these delays 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. See the help topic [Lead Nurturing Workflow](#).

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 campaigns.

## 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 to use 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 use the **CRM Template Categories** feature.
5. In the **Template** column, choose one of the email marketing templates you want to use in this campaign. 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 value this later.
7. To offer a discount through this event, or to track this event with a promotion, select it in the **Promotion** column.
8. Click **Add**.
9. Repeat these steps for each different template you will use in your lead nurturing campaign.
10. 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

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

You could use the Mail Merge feature, however, email campaigns offer additional functionality. For example, 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 blocks images from showing.

- Only include short summaries in the newsletter, with links to the 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. 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 in NetSuite it as a marketing template. See [Marketing Templates](#).
3. Create the target group for the newsletter. You may want to send 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 must 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 and have sales reps follow up with clients for upsell opportunities. See [Lead Nurturing Campaigns](#).

## 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.  
Ensure 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 attach files to campaign email. However, you can permit recipients to access files you saved in your NetSuite file cabinet through links in your campaign email.

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

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

The screenshot shows a NetSuite File record form. The 'FILE NAME' field contains 'addressList.xlsx'. The 'FILE TYPE' is 'Excel File' and the 'FILE SIZE (BYTES)' is '8,360'. On the right side, there are four checkboxes: 'INACTIVE', 'AVAILABLE FOR SUITEBUNDLES', 'HIDE IN SUITEBUNDLE', and 'AVAILABLE WITHOUT LOGIN'. The 'AVAILABLE WITHOUT LOGIN' checkbox is checked and highlighted with a red rectangular box.

2. 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.

You could also use an email merge operation to provide files through email. With email merges, you can include attachments, but you lose the revenue and lead tracking abilities that are available with campaigns.

## Using the Sent Email List

The Sent Email List provides a view into all outgoing email sent from an account. You can view email that was delivered successfully as well as email that was not delivered to the recipient. By default, the Sent Email List and search capabilities are only accessible to users with the Administrator role. Administrators can assign the Sent Email permission to other roles, which lets users with those roles use the feature.

The Undelivered Emails feature is also available in your NetSuite account. See [Undelivered Emails Saved Search](#).

**Note:** The planned deprecation of the Undelivered Emails page and saved search, targeted for September 2020, has been postponed. A new target date for the deprecation has not yet been determined.

You can access all saved searches in your account from Lists > Search > Saved Searches. The Sent Email feature provides similar capabilities as the Undelivered Emails feature. However, Sent Email also provides information on all outbound email sent from an account. The Sent Email List displays the following details for all outbound email:

- Send date, Log date, and sender (From)
- Subject - Shows the first 300 bytes of the subject line of the message.
- Recipients (To/Cc/Bcc)
- Body - Shows the first 1,000 bytes of the body of the message. HTML tags are removed for readability. Any private or sensitive information is masked.
- Message ID
- Status - **Sent** or **Not Sent**. (Email delivery status per recipient is shown on the Sent Email record.)
- Compliance Verified - Indicates whether messages comply with standards, including DKIM alignment. For more information, see the help topic [DomainKeys Identified Mail \(DKIM\)](#).

For information on how to optimize email campaign delivery, see the **Five Golden Rules for Outbound Email** in [Email Best Practices](#).

You can schedule Sent Email saved searches the same way that you scheduled Undelivered Emails saved searches.

### To use the Sent Email List:

To view the Sent Email List or to incorporate new saved searches in your account:

- You have several options to view the information on the Sent Email List:
  - Go to Setup > Company > Communication > Sent Email List.
  - Go to Setup > Company > Communication > Sent Email List > Search. On the Sent Email Search page, click **Personalize Search** or **Create Saved Search**.
  - To create a saved search, go to Lists > Search > Saved Searches. Click **New Saved Search**. In the list, click **Sent Email List**. Customize the search as required, and click **Save**.
- The Sent Email List or Send Email Saved Search page display the results of email generated from your NetSuite account. The status of email in the list will be either **Sent** or **Not Sent**.

Status	Description
Sent	The message was sent from NetSuite and delivered to all recipients. That is, none of the email addresses were bounced or filtered.
Not Sent	The message was not delivered to at least one of the intended recipients. At least one of the email addresses was bounced or was filtered before sending.

- To view the delivery status, click the corresponding row number with the status of **Not Sent** or **Sent**.

#	SENT DATE	LOG DATE	FROM	SUBJECT	STATUS	TO RECIPIENTS	CC
1	8/27/2019 8:28 am	8/27/2019 8:28 am	"Example.com (jmuller@example.com)" <email@example.com>	Verify your email address with Example.com	Not Sent	awolfe1@wolfelectronics.com	
2	8/27/2019 8:28 am	8/27/2019 8:28 am	"Example.com (jmuller@example.com)" <email@example.com>	Verify your email address with Example.com	Sent	ksmith12@wolfelectronics.com	
3	8/21/2019 9:01 am	8/21/2019 9:01 am	"Example.com (jmuller@example.com)" <email@example.com>	Verify your email address with Example.com	Not Sent	awolfe1@wolfelectronics.com	
4	8/21/2019 9:01 am	8/21/2019 9:01 am	"Example.com (jmuller@example.com)" <email@example.com>	Verify your email address with Example.com	Sent	mgarcia15@wolfelectronics.com	

For example, an email in the third row was Not Sent on 8/21/2019. If you clicked on the number 3, you would see the reason for the failure in the following screenshot:

**Sent Email**

**Email**

SENT DATE  
8/21/2019 9:01 am

LOG DATE  
8/21/2019 9:01 am

FROM  
"Example.com (jmulier@example.com)"

SUBJECT  
Verify your email address with Example.com

TO RECIPIENTS  
"awolfe1@wolfeelectronics.com"

CC RECIPIENTS

BCC RECIPIENTS

MESSAGE-ID  
<eis53jsrmmfmh6xdzx24h5tjj3kusue2j19m6af0uvOthlqwSz1ep7x4hbc69f@example.com>

COMPLIANCE VERIFIED

BODY

We received a request to update the email address that you use to log in to Example.com from awolfe@wolfeelectronics.com to awolfe1@wolfeelectronics.com.

To complete this change, please click the following link to confirm:

<https://example.com/app/center/validatekey.nl?key=qREQbWZEKfvuOW-ndRnt&compid=123456>

This link is valid until 8/23/2019 9:01 am.

If you did not make this request, please contact your administrator.

RECIPIENT	STATUS	FAILURE REASON
awolfe1@wolfeelectronics.com	UNDELIVERED	Permanent Failure: Other undefined status

If you clicked on the number 1 in the first row of the Sent Email List, you could see that an attempt was made to the same email address on 8/27/2019, but delivery was skipped, because that email address had previously resulted in a bounced email.



**Sent Email**

**Email**

SENT DATE  
8/27/2019 8:28 am

LOG DATE  
8/27/2019 8:28 am

FROM  
"Example.com (jmulder@example.com)"

SUBJECT  
Verify your email address with Jane Inc.

TO RECIPIENTS  
"awolfe1@wolfelectronics.com"

CC RECIPIENTS

BCC RECIPIENTS

MESSAGE-ID  
<a0io78hkyqxifdlh8cr067zy0a5dlscyam7xpl7uv7x78lhsp1r7v8s1xe144zau@example.com>

COMPLIANCE VERIFIED

BODY

We received a request to update the email address that you use to log in to Example.com from awolfe@wolfelectronics.com to awolfe1@wolfelectronics.com.

To complete this change, please click the following link to confirm:

<https://example.com/app/center/validatekey.nl?key=5jCZg75t1hQtrWupMHfk&compid=123456>

This link is valid until 8/29/2019 8:28 am.

If you did not make this request, please contact your administrator.

RECIPIENT	STATUS	FAILURE REASON
awolfe1@wolfelectronics.com	SKIPPED	Not sent: Specific address(es) recently bounced

See the following table for information on the meaning of various recipient statuses and failure reasons.

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

Status	Failure Reason	Description
Undelivered	Permanent Failure: Mailbox disabled, not accepting messages	The mailbox exists, but is not accepting messages.

Multiple delivery statuses can exist in a single Sent Email record. For example, if you clicked on the number 1 in the following Sent Email List:

#	SENT DATE	LOG DATE	FROM	SUBJECT	TO RECIPIENTS	BODY	STATUS	COMPLIANCE VERIFIED	MESSAGE ID
1	11/8/2019 3:33 am	11/8/2019 3:33 am	J. Muller <jmuller@sales.example.com>	Orders Report January 2020	N. Real <nreal@fulfilment.example.net>	Hi all. See new orders report in attachment.	Not Sent	Yes	<f5qn4swwb2hkt786qbc89n83z27893bhqw66td7mic82q1n5582bmswi8y4bq@sales.example.com>
2	11/8/2019 3:31 am	11/8/2019 3:31 am	J. Muller <jmuller@sales.example.com>	Orders Report December 2019	Ms. Take <mtake@fulfilment.example.net>	Hi all. See new orders report in attachment.	Not Sent	Yes	<1d1k2a0n3n19582bmswi8y4bq@sales.example.com>
3	11/8/2019 3:27 am	11/8/2019 3:27 am	J. Muller <jmuller@sales.example.com>	Orders Report November 2019	N. Real <nreal@fulfilment.example.net>	Hi all. See new orders report in attachment.	Not Sent	Yes	<kk36yo3oud7mic82q1n5582bmswi8y4bq@sales.example.com>
4	11/8/2019 3:26 am	11/8/2019 3:26 am	J. Muller <jmuller@sales.example.com>	Orders Report October 2019	O.K. Team <okteam@fulfilment.example.net>	Hi all. See new orders report in attachment.	Sent	Yes	<1mbchzjkn7bmic82q1n5582bmswi8y4bq@sales.example.com>
5	11/8/2019 3:26 am	11/8/2019 3:26 am	J. Muller <jmuller@sales.example.com>	Orders Report September 2019	O.K. Team <okteam@fulfilment.example.net>	Hi all. See new orders report in attachment.	Sent	Yes	<1d1k2a0n3n19582bmswi8y4bq@sales.example.com>

You can see that a different status was recorded for each recipient.

Sent Email		
<b>Email</b>		
SENT DATE 11/8/2019 3:33 am		
LOG DATE 11/8/2019 3:33 am		
FROM J. Muller		
SUBJECT Orders Report January 2020		
TO RECIPIENTS nreal@fulfilment.example.net		
CC RECIPIENTS bad.eyedee@warehouse.example.net		
BCC RECIPIENTS okteam@fulfilment.example.net		
MESSAGE-ID <f5qn4swwb2hkt786qbc89n83z27893bhqw66td7mic82q1n5582bmswi8y4bq@sales.example.com>		
<input checked="" type="checkbox"/> COMPLIANCE VERIFIED		
BODY Hi all. See new orders report in attachment.		
RECIPIENT	STATUS	FAILURE REASON
bad.eyedee@warehouse.example.net	UNDELIVERED	Permanent Failure: Unable to route
nreal@fulfilment.example.net	SKIPPED	Not sent: Specific address(es) recently bounced
okteam@fulfilment.example.net	DELIVERED	

## Managing Bounced Email

It is important that a marketer develop a positive sender reputation. One way to do this is to avoid sending email to invalid email addresses. NetSuite tracks when an email message is returned due to invalid address (hard bounce).

NetSuite tracks any address that hard bounced from any email sent from NetSuite including marketing campaigns, mail merge, and transactional email.

When a message sent to an email address results in a hard bounce, NetSuite marks that email address 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 NetSuite maintains the bounce history of an email address, go to Setup > Company > Email > Email Preferences. In the **Remove Email Addresses From Bounced Email Address List After** field, enter the number of days NetSuite should keep copies of bounced email addresses.

You can use the search field Hard Bounced to filter recipients with invalid email addresses from your marketing groups. See [Choosing Email Recipients](#).

You can view and manage the list of hard bounced email addresses at Lists > Relationships > Bounced Email Addresses. 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. See [Creating Groups Based On Campaign Response Count](#).

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

- [Using the Sent Email List](#)
- [Troubleshoot Undelivered Email](#)
- [Undelivered Emails Saved Search](#)
- [Invalid Email Address Notification](#)
- [Mass Unsubscribing Entities with Bounced Email Addresses](#)

## Troubleshoot Undelivered Email

This topic includes troubleshooting tips to determine why email messages from NetSuite are not delivered.

For information on how to optimize email campaign delivery, see the **Five Golden Rules for Outbound Email** in [Email Best Practices](#).

1. If an email message to one person was not delivered, go to Lists > Relationships > Bounced Email Addresses. 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 [Using the Sent Email List](#) or [Undelivered Emails Saved Search](#).
3. Go to Setup > Company > Communication > Sent Email List or 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, 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, set up a DKIM key for the domain populated by the customer in the From header of the email. You can set up DKIM keys for each domain you use

in the From header, but only one DKIM key per domain. When you send 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 [DomainKeys Identified Mail \(DKIM\)](#). See also [Setting Email Preferences](#).

## Undelivered Emails Saved Search

**Note:** The planned deprecation of the Undelivered Emails page and saved search, targeted for September 2020, has been postponed. A new target date for the deprecation has not yet been determined.

The Undelivered Emails saved search helps users analyze email deliverability problems. Go to 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 denotes undelivered email messages because they failed to meet the NetSuite compliance standards including DKIM alignment. For more information about DKIM, see the help topic [DomainKeys Identified Mail \(DKIM\)](#).

For information on how to optimize email campaign delivery, see the **Five Golden Rules for Outbound Email** in [Email Best Practices](#).

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

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

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

## Invalid Email Address Notification

When an email message returns an invalid address (hard bounce), records associated with that email address display a warning about the invalid email address. This includes:

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

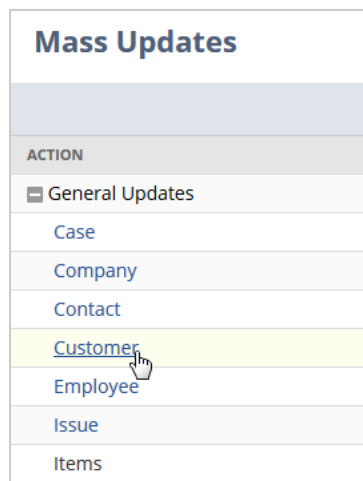
**Note:** NetSuite will not send messages (for a specified number of days) to addresses that trigger a hard bounce. You set the number of days in the **Remove Email Addresses From Bounced Email Address List After** preference. Go to Setup > Company > Email > Email Preferences.

## Mass Unsubscribing Entities with Bounced Email Addresses

You can use a mass update to unsubscribe entities with invalid email addresses from email campaigns. You can base the mass update on the Hard Bounced field on a record whenever email sent from NetSuite triggers a hard bounce.

### To unsubscribe entities with bounced email addresses:

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



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

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

## Viewing the Bounced Email Address List

Email campaign administrators can view the reason for a delivery failure to a particular email address to better manage their email campaign lists. The reason code indicates whether the failure to deliver is temporary (soft bounce) or permanent (hard bounce). Go to Lists > Relationships > Bounced Email Addresses.

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

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

Key Features:

- NetSuite evaluates transactional email message addresses against hard bounce records in the list. If the recipient for a transactional message matches a hard bounce record in the list, NetSuite does not send the message.
- NetSuite evaluates bulk email message addresses against soft bounce records in the list. If the recipient for a bulk message matches a soft bounce record in the list, NetSuite does not send the message.
- Soft bounces for both bulk and transitional email recipient addresses are included in the list. NetSuite applies a fixed-length TTL 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. You can also click **Mark All** to select all email addresses in the list.
3. Click **Delete**.

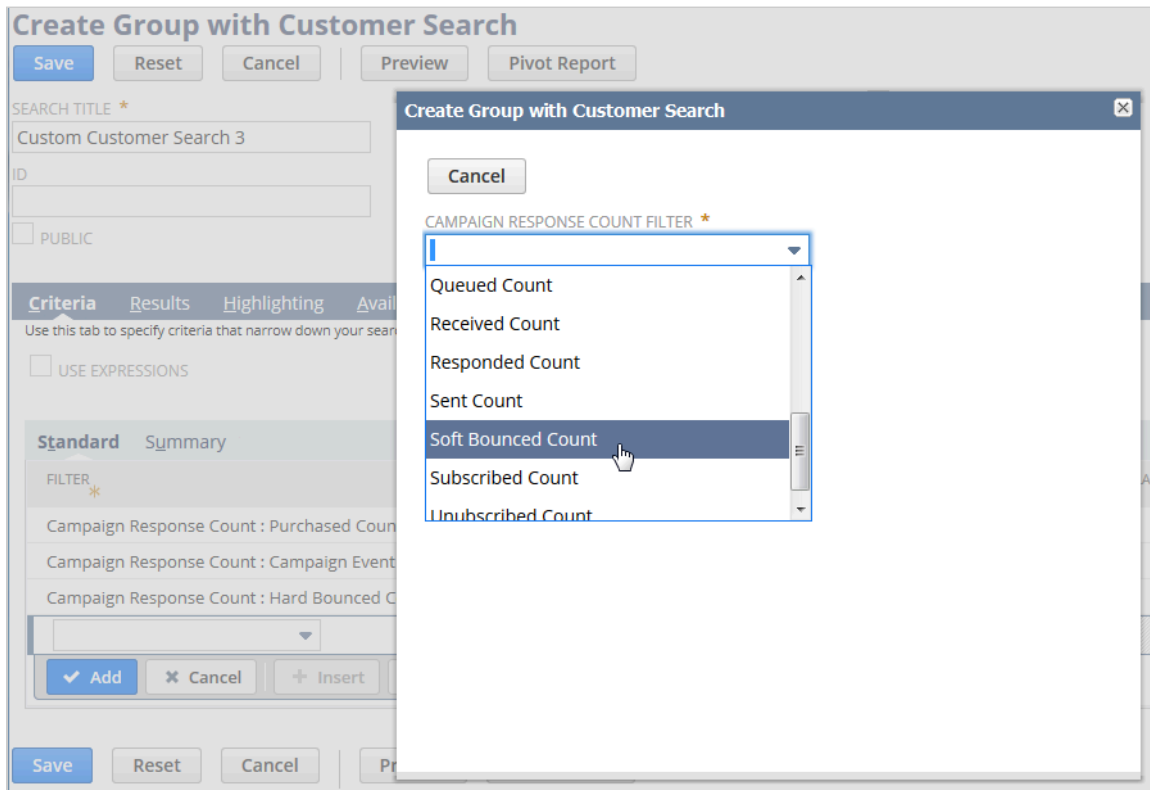
When you clear the bounce history for an email address, you can send messages to that address.

## 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. For example, Soft or Hard Bounced Count, Sent Count, Queued Count, or Clicked Through Count. This capability can have multiple uses. An example follows.

## 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. In the popup window, choose **Hard Bounced Count**. Then, set the value of the count to be any value 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 can purchase keywords through such services as Google Adwords and Yahoo! Sponsored Search.

The first step to execute 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](#)
- Create keyword campaigns individually

On the Create Keyword Campaigns page, you can import keywords and create keyword campaigns. This functionality lets you create many keyword campaign records in bulk.

Before you create keyword campaigns, you should first set up autonumbering for your campaigns. You should also set the Bulk Keyword Campaign Naming Template preference. Go to at Setup > Sales & Marketing Automation > Set Up Marketing. When you enter a campaign record, NetSuite assigns the campaign ID based on this preference.

When you autonumber campaigns, NetSuite generates the landing page URLs for paid keywords. You must only enter the URL of the destination page in the URL field. When you save the record, NetSuite adds the campaign ID parameter 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:

```
1 | 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. You can hide them.
- When you create a paid search or display advertisement with a service, provide them your site's URL. The URL should include the Lead Source or Event ID parameters. These parameters let you track how customers arrived to your site.

Advertising services include DoubleClick, Facebook, Twitter, etc.

- 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 detail on Lead Source and Campaign Event. See [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.

### 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, NetSuite creates campaign records for each keyword you added on the Keyword subtab. NetSuite applies the vertical, audience, and items selected to each campaign record.

NetSuite names the keyword campaigns based on the Bulk Keyword Campaign Naming Template preference. Go to 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 you include all of the keyword campaign information. The search engines, families, and offers listed in the CSV file must exactly match the corresponding records.

NetSuite names the created keyword campaigns based on the Bulk Keyword Campaign Naming Template preference. Go to Setup > Sales & Marketing > Marketing Preferences.

### To import keyword campaigns:

1. If you logged in with a marketing role, go to Campaigns > Marketing > Create Keyword Campaigns > Import.  
If you 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.
4. Save the file to your system, and then populate the saved file with your keyword data.

5. Click **Select** to choose the keyword campaign CSV file you prepared.
6. Click **Next**.
7. In Step 2: View Mapping / Start Import page, compare the fields mapping (columns) in your CSV file to fields on the campaign record.  
Make any necessary changes or additions.
8. Click **Run** to start the import.

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

## Naming Keyword Campaigns

NetSuite names keyword campaigns that you create in bulk, or that you import based on the Bulk Keyword Campaign Naming Template preference. Go to Setup > Sales & Marketing > Marketing Preferences.

By default, this naming template uses the following format:

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

Therefore, a 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. If you do, this information does not appear in the title of the keyword campaigns you create.

If you enter individual keyword campaign records manually, you should maintain this format to ensure your keyword campaign names are recognizable.

## Exporting Keywords

After you enter your keyword campaigns, you can create a saved search 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 may 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 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 then click Save. When you view the 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, when a customer finds your site through a search engine, NetSuite captures that customer's keyword campaign information. This lets you track revenue and lead generation for your paid keywords.

To make this information available 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, provide the landing page URL when customers click a search results link to your website.

You should format the landing page URL as follows so that NetSuite associates the correct keyword campaign with the customer record:

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

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

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

When a lead clicks the link to your site, NetSuite saves the lead source in the cookie received from your website. NetSuite maintains this information 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, NetSuite saves the lead source to the record.

## Managing Cost-Per-Click

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

## Campaign Families

Campaign families represent a group 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:** When you group keyword campaigns by family, it is simpler 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. NetSuite includes the Family Name field 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 feature lets you maximize your sales and marketing efforts. It determines which items present a good upsell opportunity, and which customers you should target. This process is also known as **product affinity analysis**.

Upsell Manager searches your customer transaction histories to recommend possible upsell items and categories of items. It chooses these upsell items and item categories based on their **correlation**. Correlation is a measure of how often the same customer purchases two items.

For example, Wolfe Electronics used Upsell Manager to determine that 30% of customers that bought laptops also purchased store warranties on those machines. Wolfe decided to create a list of customers that purchased laptops but not warranties in an effort to upsell store warranties to those customers.


Another value Upsell Manager uses is **lift**. Lift is the difference between an item's correlation and its purchase rate (percentage of customers who purchased it). Then, create a list of customers that are likely to buy the items you choose to upsell. Upsell Manager then guides you through each step in the process.

When you know 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 you use the Upsell Manager feature:

- an Upsell subtab appears on customer records that lists 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, you should set upsell preferences. Go to Setup > Sales > Upsell Preferences. Upsell preferences let you limit the number of items that display on the Upsell subtab and the Upsell Items popup window on transactions.

To upsell to your customers, you can:

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

To enable the Upsell Manager feature, an administrator can go to Setup > Enable Features > CRM subtab. Check the Upsell Manager box, and then click Save.

## Using the Upsell Manager Wizard

The Upsell Manager Wizard helps you create lists of upsell customers. To upsell with the Upsell Manager, go to Campaigns > Marketing > Upsell Manager.

Each step in the wizard appears in its own topic.

## 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 do not know which items or item categories you want to upsell. This option lets you search for upsell items based on past purchases.

Click **Next**.

## Step 2 of 5: Selecting Upsell Items

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

### Upselling Based on Items to Upsell

To 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.

The correlation between purchased items and upsell items is the percentage of customers who purchased both the upsell item and the correlated item.

Use the selected upsell items to create a list of customers that purchased the correlated item but not the upsell item.

For example, a Wolfe Electronics sales rep wants to upsell service plans. They use Upsell Manager to determine that there is a strong correlation between service plans and laptops. They create a group of customers that purchased laptops but not 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. Set the following upsell search criteria to filter your upsell item search results:
  - **Correlation Greater Than** – NetSuite returns only those items with a correlation greater than what you set 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** – NetSuite returns only those items with a greater count than what you set in your upsell item search.  
Count represents the number of customers that 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. Check the boxes in the **Apply** column to select the item pairs on which you want to base your upsell.
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

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

The correlation between purchased items and upsell items is the percentage of customers who purchased both the upsell item and the correlated item.

For example, a Wolfe Electronics sales rep uses Upsell Manager to decide which items they can upsell to their customers. They use Upsell Manager to determine that there is a strong correlation between desktop computers and wireless routers. They create a group of customers that purchased desktop computers but not 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. Set the following upsell search criteria to filter your upsell item search results:
  - **Correlation Greater Than** – NetSuite returns only those items with a correlation greater than what you set 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.
  - **Lift Greater Than** – NetSuite returns only those items with a greater lift than what you set in your upsell item search.  
Lift is the degree to which the item's correlation exceeds its overall purchase frequency (**correlation - purchase frequency**). Purchase frequency is the percentage of customers who purchased an item.  
A high lift implies a more reliable correlation.  
For example, Wolfe Electronics sold Dell XPS 13 Developer Edition 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 sold its less expensive Dell Inspiron 15 3000 laptops to 300 customers. 150 of these customers purchased the premium warranty. A correlation of 50% and a purchase frequency of 30%. The lift is 20%.
  - **Count Greater Than** – NetSuite returns only those items with a greater count than what you set in your upsell item search.  
Count represents the number of customers that 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. Check the boxes in the **Apply** column to select the item pairs on which you want to base your upsell.
6. Click **Next**.

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

## Step 3 of 5: Additional Customer Criteria

After you choose your upsell items or item categories, define the list of target customers with the upsell.

By default, the customer search finds customers that purchased the upsell items but not 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 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

To exclude customers from the upsell effort, clear the box in the **Apply** column next to the customer's name.

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

 **Note:** When you click **Next** NetSuite does not contact customers.

After you choose the customers you want to include, you can choose upsell actions.

## Step 5 of 5: Choosing Upsell Actions

The Choose Upsell Action page provides four actions for how NetSuite should proceed with this upsell effort. You can choose any of these actions.

For each upsell action, enter information in the fields provided. NetSuite uses this information when it creates 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. NetSuite creates an opportunity for each customer in the upsell customer results list with the same title and expected close date.

- **Create a group of customers to upsell to**

If you choose this action, NetSuite creates a group record from this list of upsell customers. You can then create a marketing campaign targeting this group or perform a bulk merge that offers the upsell items to these customers.

- **Create tasks for the sales reps assigned to the upsell customers**

If you choose this action, NetSuite creates task records for the sales rep assigned to each customer.

- **Schedule phone calls for each upsell customer**

If you choose this action, NetSuite creates phone call records for the sales rep assigned to each customer.

- **Create opportunities for each upsell customer**

If you choose this action, NetSuite 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 choose your upsell actions, click **Finish**.

## Upselling From Customer Records

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

The Upsell subtab presents suggested upsell items that sold well with items that customers 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 and the items the customer purchased. The Count value indicates the number of customers that purchased both items, which provides the relative reliability of the correlation.

For example, Wolfe Electronics considers two items for upsell. The first item has a correlation of 50% and a count of six. The second item has a correlation of 20% and 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 to whom you want to upsell.
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 automatically selected.
6. Click the **Items** subtab.
7. Click **Upsell Items**.
8. In the Upsell Items popup window, check the boxes next to the items you want to upsell to the customer.
9. Click **Submit**.  
NetSuite adds these items to the opportunity.
10. Add additional items and enter other information on the opportunity.
11. Click **Save**.

Now you can provide this opportunity to your sales team so that they can negotiate the offer with the customer.

 **Note:** To maintain optimal NetSuite performance, you should set upsell preferences to limit the number items that display. Go to Setup > Marketing > Upsell Preferences. These limited items appear on the Upsell subtab of the customer record and the Upsell Items popup window 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 window lists items and item categories that historically sold well with the items on the transaction.

Each upsell item displays 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 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. After they select 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 if so, they add it to the order.

 **Note:** NetSuite searches for correlation on each item separately when you search 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 window, check the boxes next to the items you want to upsell to the customer.
5. Click **Submit**.  
NetSuite adds the item to the transaction.

 **Note:** To maintain optimal NetSuite performance, you should set upsell preferences to limit the number items that display. Go to Setup > Marketing > Upsell Preferences. These limited items appear on the Upsell subtab of the customer record and the Upsell Items popup window on transactions.

## Upsell Preferences

You should set up the upsell preferences before you use the Upsell Manager feature. Go to Setup > Sales > Upsell Preferences.

- **Items to Upsell** – When you upsell from transactions or from the customer record, NetSuite provides a list of possible upsell items. NetSuite generates this item list 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 were manually selected on the Related Items subtab of item records.

Choose from the following:

- **Show Upsell Items and Related Items** – Both related items and items with correlation display on the Upsell subtab and in the Upsell Items popup window.
- **Show Upsell Items If There Are No Related Items** – Related items display on the Upsell subtab and in the Upsell Items popup window. If there are no related items, items that correlate with past purchases display.
- **Show Only Related Items** – Only related items display on the Upsell subtab and in the Upsell Items popup window.
- **Minimum Correlation** – When you suggest 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 window on transactions
  - Appears by default in the Correlation Greater Than field on the Select Upsell Items page when you use 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 sold in a large percentage of transactions. A high lift implies a more reliable correlation. For example, an electronics dealer might notice that CD-Rs have very low lift because 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 window on transactions
  - Appears by default in the Lift Greater Than field on the Select Upsell Items page when you use Upsell Manager
- **Minimum Count** – Count represents the number of customers that 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 window on transactions
- Appears by default in the Lift Greater Than field on the Select Upsell Items page when you use Upsell Manager

After you set these preferences, click Save.

## Limits on Upsell Manager Data

The amount of upsell data that NetSuite stores on your account depends on how many items or customers you have. NetSuite uses the larger of these two values to determine your allocation. The following table provides examples of allocations and an explanation of how NetSuite calculates larger-sized accounts.

Number of customers / items	Number of correlations / recommendations allowed
<2000	100
5000	40
10000	20
25000	8
50000	4
100000	2

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

1. Determine the number of items or customers in your account and use the larger of these two values (for example, 4500 customers).
2. Divide this number by 2000\* (4500 / 2000 = 2.25).
3. Divide 100\*\* by the figure above (100 / 2.25 = 44).
4. This value is the number of correlated items and customer recommendations NetSuite allocates to your account. For example, NetSuite allows an account with 4500 customers 44 recommendations per customer and 44 correlations per item.

\* the customer/items threshold.

\*\* the correlations/recommendations threshold.

## Product Affinity Analysis in Search

You can use upsell data in item search results. This enables 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 purchased by the same customer as a certain item. (Correlation is the percentage of customers who purchased both the correlated item and the upsell item.)

- **Correlated Item Count** - This is the number of customers who 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 purchase rate of the correlated item, or the percentage of customers who purchased a certain item.)
- **Correlated Item Purchase Rate** - This is the percentage of customers who purchased the correlated item.
- **Correlated Item Fields** - This field group includes all of the fields on the item record of the correlated item.



**Note:** NetSuite provides weekly updates to the upsell data for accounts that exceed 2000 customers and items. See [Limits on Upsell Manager Data](#).