Promotions

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Promotions

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 Promotions can help you to move out-of-date stock, increase sales, and reward valuable clients.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

Promotions Overview

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

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

You can offer your customers:

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

Enhancements Introduced in SuitePromotions

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

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

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

Stackable Promotions

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

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

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▶ View the Combining SuitePromotions video

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

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

Auto-Apply Promotions

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

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

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

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

The following diagram shows the steps needed to automatically apply promotions to a transaction.
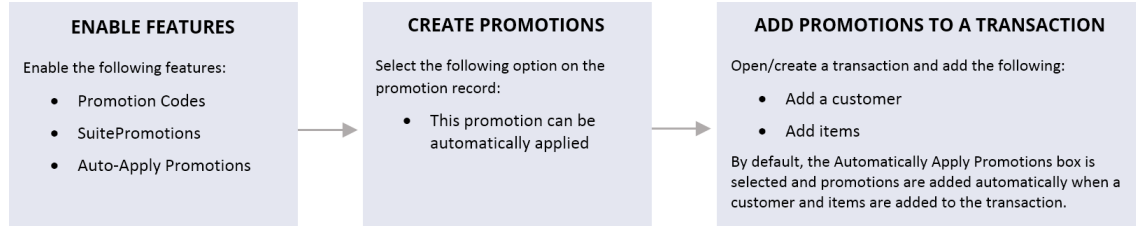
ENABLE FEATURES	CREATE PROMOTIONS	ADD PROMOTIONS TO A TRANSACTION
Enable the following features: • Promotion Codes • SuitePromotions • Auto-Apply Promotions	Select the following option on the promotion record: • This promotion can be automatically applied	Open/create a transaction and add the following: • Add a customer • Add items By default, the Automatically Apply Promotions box is selected and promotions are added automatically when a customer and items are added to the transaction.

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

Best Offer

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

For more information, see the help topic How Best Offer is Applied.

Cached Saved Searches

The Cached Saved Search feature lets you configure the way that a promotion handles saved searches. You can choose to use cached saved searches which provide better performance by returning the

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results faster. You can also choose to check for the latest saved search results every time a promotion is applied to a transaction to get the most up to date results possible, but results are retrieved slower.

For more information, see the help topic Saved Search Performance.

Audit and Visibility

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

For more information see the help topic Viewing the Status of Applied Promotions.

Automatically Add Free Gift to the Transaction

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

For more information see the help topic Creating Free Gift Promotions.

Features Specific to Advanced Promotions Only

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

Tiered Promotions

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

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

For more information, see the help topic Creating Tiered Promotions.

Configuring Promotions

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

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

Enabling Promotion Features

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

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

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

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

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

To enable Promotion features:

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

> ⓘ **Note:** The SuitePromotions feature is not compatible with the Revenue Commitments feature. Disable Revenue Commitments before you enable SuitePromotions. For more information, see the help topic Enabling the Revenue Commitments Feature.

Enabling Other Features that Impact Promotions

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

- locations
- websites

Enabling Features for Location-Based Promotion Eligibility

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

To enable the Locations feature:

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

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Enabling Features for Website-Based Promotion Eligibility

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

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

Configuring How Free Shipping Eligibility is Calculated

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

To configure how free shipping eligibility is calculated:

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

Installing Advanced Promotions

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

To install the Advanced Promotions bundle:

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

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- Bundle ID: 49247

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

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

3. Enable the promotion types:

   a. Go to Customization > Plug-ins > Manage Plug-ins > Promotions (Administrator).

   b. On the Manage Plug-In Implementations page, under Promotions, check the box next to each promotion type you want to create.

   c. Click **Save**.

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

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

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

Under Permissions > Lists:

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

Under Permissions > Custom Record:

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

The Promotion Record

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

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

Basic Properties of a Promotion

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

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

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

Scheduling Promotions

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

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

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

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

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

Promotion Buy Conditions

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

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

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

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

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

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

Promotion Get Conditions

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

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

What the Discount is Applied to – Promotion Types

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

Types of SuitePromotions

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

There are five types of SuitePromotions:

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

Non-SuitePromotions Types

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

- **Standard Promotions** – see the help topic Creating Standard Promotions.

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- **Advanced Promotions** – see the help topic Creating Advanced Promotions.

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

Promotion Discount Rates

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

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

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

Promotion discount rates are defined:

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

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

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

Fixed Price Item Discounts

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

For information, see the help topic Creating Fixed Price Item Promotions.

Free Gift Promotions

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

For information, see the help topic Creating Free Gift Promotions.

Tiered Promotion Discounts

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

For information, see the help topic Creating Tiered Promotions.

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

Apply Promotion Discount to Each or Every X Items

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

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- each eligible item in the transaction, or

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

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

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

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

Coupon Codes

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

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

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

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

See also:.

- Associating Coupon Codes With a SuitePromotion

- Associating Coupon Codes With a Standard Promotion

- Associating Coupon Codes With an Advanced Promotion

Single-Use Coupons

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

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

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

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

All single-use codes are listed on the Coupon Codes subtab on the promotion. You can click a code to see more details including the date it was sent and which customer used the code. Single-use coupon

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codes can be used on sales transactions entered through your web store as well as those entered in NetSuite.
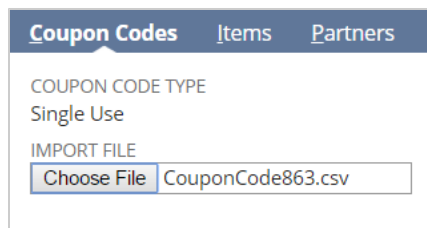
To create a promotion with single-use coupon codes, click the Coupon Codes subtab, and in the Number of Uses field, select Single Use.

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

Importing Single-Use Coupon Codes

To import a CSV file with coupon codes, you can do any of the following:
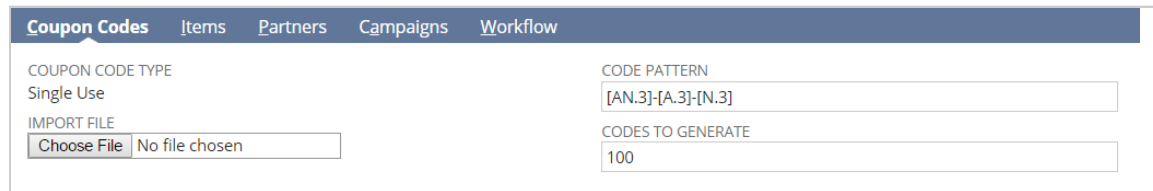
- First create and save the promotion record. Then, go to Lists > Marketing > Import Coupon Codes (Administrator). Download the CSV template, enter the name of the promotion record in the first column, enter your coupon codes in the second column, and then run the CSV import.

- You can also import coupon codes on the promotion record when you are creating the promotion record by selecting your CSV file in the Import File field. When you save the promotion, the coupon codes are imported.

Generating Single-Use Coupon Codes on the Promotion Record

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

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

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

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

- ABC-J3N-FLN-647

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

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

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

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

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

Coupon Code ·

VIEW
Coupon Codes ▾

| New | Customize View | Export - CSV |

EDIT	CODE ▲	USED
Edit	ABC-1FZ-HYL-466	No
Edit	ABC-36B-YMX-517	No
Edit	ABC-3HK-ZHW-845	No
Edit	ABC-47D-XFH-472	No
Edit	ABC-61X-NWD-435	No
Edit	ABC-8WN-TBS-770	No
Edit	ABC-97M-PEX-238	No
Edit	ABC-E40-BJQ-904	No

Promotions and Marketing Campaigns

Promotions can work with your marketing campaigns.

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

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

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

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

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

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

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

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

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

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

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

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

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

Sending Single-Use Coupon Codes Through Email Campaigns

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

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

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

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

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

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

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

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

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

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Targeting Promotions at Specific Customers

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

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

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

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

Setting Where Promotions Can Be Used

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

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

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

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

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

Promotion Usage Limits

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

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

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

Creating Promotions

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

- Creating SuitePromotions:
  - **Item promotions** – see the help topic Creating Item Promotions.
  - **Fixed price item promotions** – see the help topic Creating Fixed Price Item Promotions.

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- □ **Order promotions** – see the help topic Creating Order Promotions.
  - □ **Shipping promotions** – see the help topic Creating Shipping Promotions.
  - □ **Free gift promotions** – see the help topic Creating Free Gift Promotions.
- ■ Creating Standard Promotions
- ■ Creating Advanced Promotions:
  - □ **Item-based promotions** – see the help topic Creating Item-Based Advanced Promotions.
  - □ **Buy X, Get Y promotions** – see the help topic Creating Buy X, Get Y Advanced Promotions.
  - □ **Order-based promotions** – see the help topic Creating Order-Based Advanced Promotions.

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

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

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

Creating SuitePromotions

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

SuitePromotion Types

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

- ■ **Item promotions** – give percentage or currency amount discounts on items. See the help topic Creating Item Promotions.
- ■ **Fixed price item promotions** – give items for a fixed discounted price. See the help topic Creating Fixed Price Item Promotions.
- ■ **Order promotions** – give percentage or currency discounts at the order level. See the help topic Creating Order Promotions.
- ■ **Shipping promotions** – give your customers free shipping on specific shipping methods. See the help topic Creating Shipping Promotions.

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- **Free gift promotions** – give your customers a free gift that is automatically added to their order. See the help topic Creating Free Gift Promotions.

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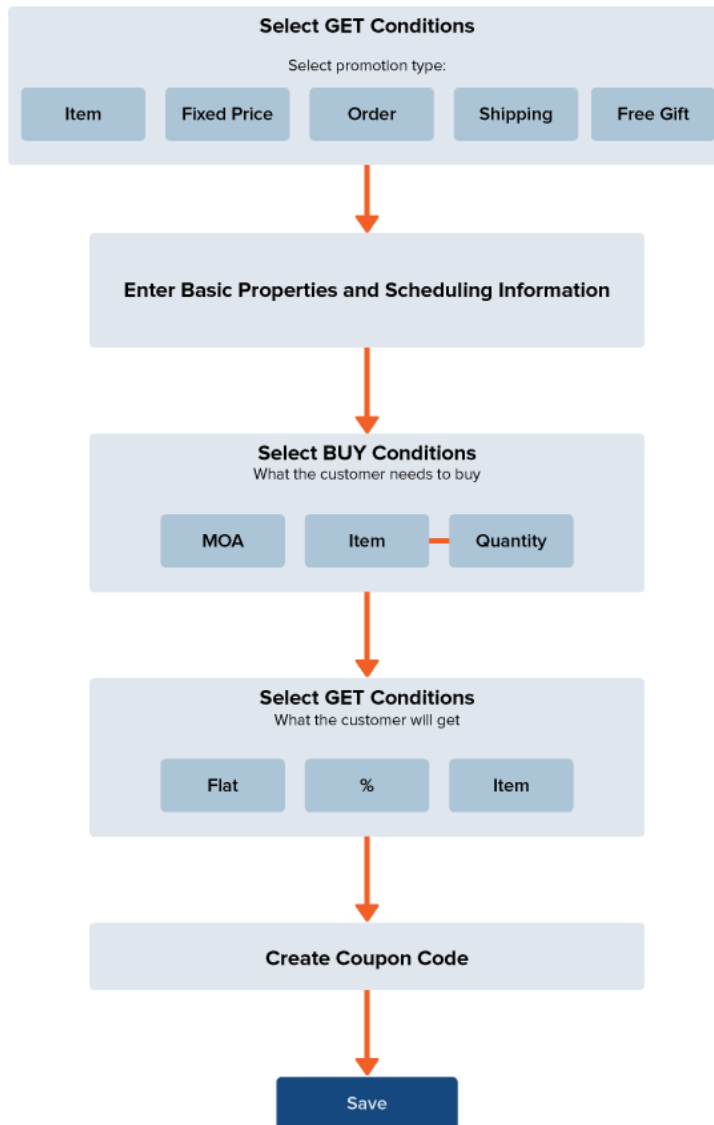
Each type of Suite Promotion follows the same workflow. You select the promotion type, enter basic properties and scheduling information, enter the Buy conditions, specify further Get conditions, and finally create a coupon code. The main variation in the process occurs when applying the Get conditions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

The promotion records for all SuitePromotions contain the following sections:

- **Basic Properties** – see the help topic SuitePromotions Basic Properties
- **Scheduling** – see the help topic SuitePromotions Scheduling
- **Further Settings** – see the help topic SuitePromotions Further Settings
- **What the Customer Needs to Buy** – see the help topic What the Customer Needs to Buy
- **What the Customer Will Get** – see the help topic What the Customer Will Get

- **Coupon Codes subtab** – see the help topic Associating Coupon Codes With a SuitePromotion
- **Audience subtab** – see the help topic Setting Customer Eligibility on SuitePromotions
- **Sales Channels subtab** – see the help topic Setting Sales Channel Eligibility on SuitePromotions
- **Usage Limits subtab** – see the help topic Setting Usage Limits on SuitePromotions

Each section is identical for each Suite promotion type with the exception of the **What the Customer Needs to Buy** and **What the Customer Will Get** sections.

SuitePromotions Basic Properties

The Basic Properties section provides basic details regarding the promotion.

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

SuitePromotions Scheduling

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

Field	Description
Start Date	Enter the date from when the promotion is valid.
End Date	Enter the date after which the promotion is no longer valid.

If you leave the Start Date and End Date fields blank, the promotion is permanently valid.

SuitePromotions Further Settings

The Further Settings section provides controls specifically related to the behavior of promotions on transactions when the SuitePromotions feature is enabled.

You can determine:

- if a promotion can be automatically applied to a transaction

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

Field	Description
Combining Options SuitePromotions enable you to combine multiple promotions on the same transaction, but you can also determine exactly which promotions can or cannot be combined with others. ⓘ **Note:** Free gift promotions cannot be made exclusive and are not considered in the Best Offer logic. For more information see the help topic Best Offer. ▶ View the Combining SuitePromotions video	
Combinable Promotion	Select this option to permit this promotion to be combined with other eligible promotions on a transaction when the SuitePromotions feature is enabled.
Exclusive Promotion	Select this option to prevent this promotion from being combined with other eligible promotions on a transaction when the SuitePromotions feature is enabled.
Item Line Exclusive Promotion	Select this option to prevent this promotion from being combined with other eligible promotions for the same item on a transaction when the SuitePromotions feature is enabled. It is important to emphasize that exclusivity is based on the item receiving the discount, not on the promotion type. This option is available for only item type promotions.
Order Type Exclusive Promotion	Select this option to prevent this promotion from being combined with other eligible order type promotions on a transaction when the SuitePromotions feature is enabled. This option is available for only order type promotions.
Shipping Type Exclusive Promotion	Select this option to prevent this promotion from being combined with other eligible shipping type promotions on a transaction when the SuitePromotions feature is enabled. This option is available for only shipping type promotions.

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Field	Description
This promotion can be automatically applied	Check this box to enable this promotion to be automatically applied to transactions when the SuitePromotions feature is enabled.
Discount Item for Accounting	Select the discount item you want to assign to this promotion. The account on the discount item is impacted by the promotion's discount. This field is mandatory but required for only accounting purposes.

What the Customer Needs to Buy

In the What the customer needs to buy section, you set the Buy conditions for the promotion. These determine what the customer must add to a transaction to be eligible for the discount provided by the promotion.

> **Note:** Item promotions can contain eligibility criteria for a minimum order amount and a specific item or items, for example, a customer must spend at least $100 and buy a blue scarf. A transaction will only be eligible for a promotion's discount if it meets all of the criteria. A blue scarf added to the order by a free gift promotion is not taken into consideration for eligibility.

Field	Description
Buy Anything	Select this option if you do not want to specify any Buy conditions. The eligibility of the promotion will not depend on what the customer buys.
Spend a Minimum Order Amount or Buy Specific Items	Select this option if you want to specify Buy conditions. The Minimum Order Amount and Specific Items boxes will appear.
Minimum order Amount	Check this box if you want to specify a minimum order amount that must be spent before a transaction is eligible for the promotion.
Specific Items	Check this box if you want to specify an item or items that must be bought before a transaction is eligible for the promotion. The Item and Item Saved Search lists appear.

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Field	Description
	Free gift items added to the order by a free gift promotion are not taken into consideration for eligibility.
From Items List	Select an item or items from the Item list that must be bought before a transaction is eligible for the promotion.
From Saved Search	Select an item saved search from the From Saved Search list that must be bought before a transaction is eligible for the promotion. Saved searches can be created to group specific items together. For example, all the dresses to be discounted in the Spring Sale. For more information, see the help topic Saved Searches. When you use an item saved search, the Saved Search Preferences subtab appears on the promotion record. For more information, see the help topic Saved Search Performance.
Apply the discount every time the following number of units are bought at full price	Check this box to require that a specific quantity of the item must be bought at full price before the discount is applied.
Units	Enter how many units the customer has to buy at full price to get an additional unit for a discounted amount. For example, enter 2 to set up "Buy 2, Get 1" or "Buy 3 for the price of 2" promotions.

What the Customer Will Get

In the What the customer will get section, you set the Get conditions for the promotion. The options available vary depending on the promotion type.

Item Promotion Get Conditions

Item promotions specify an item or items that will be discounted in the What the Customer Will Get section.

Field	Description
%	Select this option to give the customer a percentage off the selected item or items.
Flat	Select this option to give the customer a flat rate discount off the selected item or items.

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Field	Description
Discount Rate	Enter the amount to be discounted. This will either be a percentage or a currency amount depending on the type of discount selected with the previous options.
From Items List	Select an item or items from the Item list that the discount will be applied to.
From Saved Search	Select an item saved search from the From Saved Search list. The discount will be applied to one or more of the items included in the saved search if they are added to an eligible transaction. Saved searches can be created to group specific items together. For example, all the dresses to be discounted in the Spring Sale. For more information, see the help topic Saved Searches. When you use an item saved search, the Saved Search Preferences subtab appears on the promotion record. For more information, see the help topic Saved Search Performance.
Apply Discount To	This option is visible when the **Apply the discount every time the following number of units are bought at full price** box is checked. You must select if the discount is applied to the cheapest or most expensive items in the transaction.

Fixed Price Item Promotion Get Conditions

Fixed price item promotions specify items that will be available at a fixed price in the What the Customer Will Get section.

Field	Description
Fixed Price	Enter the amount of the fixed price for the selected item.
From Items List	Select an item or items from the Item list that the discount will be applied to.
From Saved Search	Select an item saved search from the From Saved Search list. The discount will be applied to one or more of the items included in the saved search if they are added to an eligible transaction. Saved searches can be created to group specific items together. For example, all the dresses to be discounted in the Spring Sale. For more information, see the help topic Saved Searches. When you use an item saved search, the Saved Search Preferences subtab appears on the promotion record. For more information, see the help topic Saved Search Performance.

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Field	Description
Apply Discount To	This option is visible when the **Apply the discount every time the following number of units are bought at full price** box is checked. You must select if the discount is applied to the cheapest or most expensive items in the transaction.

Order Promotion Get Conditions

Order promotions specify a percentage or a currency amount discount that will be applied to an order in the What the Customer Will Get section.

Field	Description
%	Select this option to give the customer a percentage off the order.
Flat	Select this option to give the customer a flat rate discount off the order.
Discount Rate	Enter the amount to be discounted. This will either be a percentage or a currency amount depending on the type of discount selected with the previous options.

Shipping Promotion Get Conditions

Shipping promotions specify a shipping method that will provide the customer with free shipping on an eligible transaction in the What the Customer Will Get section.

Field	Description
Shipping Method	Select a free shipping method from the list to be applied to eligible transactions.

Free Gift Get Conditions

Free gift promotions specify items that will be added automatically to the customer's order with 100% discount in the What the Customer Will Get section.

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Field	Description
Select Free Gift	Select an item from the Item list that the discount will be applied to. Note that you can only select a maximum of one free item. You cannot select parent-matrix items as the free gift.

Associating Coupon Codes With a SuitePromotion

The Coupon Codes subtab is where you choose how many times your coupon codes can be used and where you import or generate coupon codes.

Coupon Codes   Audience   Sales Channels   Usage Limits

Choose whether you are entering one coupon code that can be used by multiple customers for this promotion (multiple uses), or if you are entering coupon codes that can be used only once by one customer (single use).

COUPON CODE TYPE

Multiple Uses

COUPON CODE *

To add coupon codes:

On the **Coupon Codes** subtab:

1. In the **Coupon Code Type** field, choose whether the coupon code for this promotion can be used more than one time (Multiple Uses), or can only be used one time (Single Use).
2. If you are entering a multi-use coupon code, enter the code in the **Coupon Code** field.
3. If you are entering single-use coupon codes, do one of the following:
   - Select a CSV file to import
   - Enter a code pattern and the number of codes you want to generate

For more information regarding coupon codes, see the help topic Coupon Codes.

Setting Customer Eligibility on SuitePromotions

The Audience subtab is where you select which customers are eligible for the promotion. You can specify if the promotion is available to:

- **Everyone** – select this option to set no restrictions on which customers are eligible for the promotion.
- **Specific Customers** – select this option to limit eligibility for the promotion to specific customer categories, marketing campaigns, or both. You can define new categories and assign customers to them as required.

Coupon Codes   **Audience**   Sales Channels   Usage Limits

EVERYONE
SPECIFIC CUSTOMERS

CUSTOMER CATEGORY

<Type & tab for single value>

To limit eligibility for a promotion to a specific customer category:

1. Make sure you have defined your customer categories and that your customers are correctly assigned to them, or that you have defined your marketing campaign and associated this promotion.

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2. On the **Audience** subtab select the **Specific Customers** option.

3. Enter each customer category name in the **Customer Category** field.

For more information on how to create customer categories, see the help topic Customer Category.

To limit eligibility for a promotion to a specific marketing campaign:

1. Make sure you have defined your marketing campaign and associated this promotion with the campaign.

2. On the **Audience** subtab select the **Specific Customers** option.

> **(i) Note:** You do not need to enter the details of the marketing campaign here. The marketing campaign is associated with the promotion by including it's coupon code in the marketing template.

For more information on how to set up marketing campaigns, see the help topic Promotions and Marketing Campaigns.

Setting Sales Channel Eligibility on SuitePromotions

The Sales Channels subtab is where you select if eligibility for the promotion is limited to a specific location, or a specific website.

The Sales Channel subtab does not appear if the Locations feature and SuiteCommerce Advanced are not enabled.

Select the **All Locations and Websites** option to set no restrictions regarding location and website eligibility for the promotion.

See also Enabling Other Features that Impact Promotions.

Limiting Eligibility to Locations

Before you can set location-based promotion eligibility, you must first enable the Locations feature. For more information regarding creating locations and assigning them to transactions, see the help topic *Working with Locations*.

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

To limit eligibility for a promotion to a specific location:

On the **Sales Channels** subtab:

1. Select the **Specific Locations** option.

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2. Enter each location that is eligible for the promotion in the **Location** field that appears.

Limiting Eligibility to Websites

Before you can set website-based promotion eligibility, you must first install and set up the SuiteCommerce Advanced SuiteApp. Only websites created in SuiteCommerce Advanced are eligible for website-based promotion eligibility. For more information regarding creating a SuiteCommerce Advanced website, see the help topic *Creating a Website*.

To limit eligibility for a promotion to a specific website:
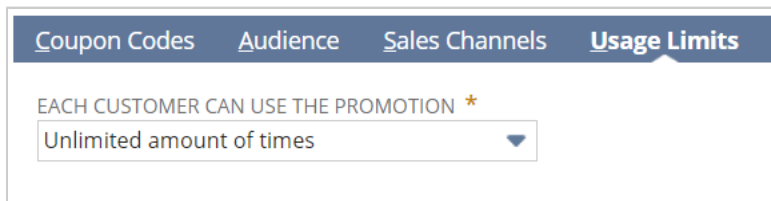
On the **Sales Channels** subtab:

1. Select the **Specific Websites** option.
2. Enter each website that is eligible for the promotion in the **Website** field that appears.

Setting Usage Limits on SuitePromotions

The usage Limits subtab is where you select how many times a customer can use the promotion. You can specify:

- **One time only** – select this option to limit usage of the promotion to one time only per customer.
- **Unlimited amount of times** – select this option to set no restrictions on how many times customers can use the promotion. This is the default behavior.

Creating Item Promotions

You can create item promotions that give customers discounts on specific items in a transaction.

To create an item promotion:

1. Go to Lists > Marketing > Promotions > New.
2. Select **Item Promotion** from the SuitePromotions category.
3. Enter a name and description for this promotion.
4. Check the **Inactive** box if you want to make the promotion inactive but not deleted. If this box is checked the promotion will not be available for selection on a transaction.
5. Enter a start date and an end date for this promotion.

    After the end date, the promotion will no longer trigger discounts, and will no longer appear in the list of available promotions.
6. Select the combinability options for this promotion. For more information, see the help topic SuitePromotions Further Settings.
7. Check the **This promotion can be automatically applied** box if you want this promotion to be automatically applied to transactions.

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In the **Discount Item for Accounting** field, select the discount item you want to assign to this promotion. The account on the discount item is impacted by the promotion's discount. This field is mandatory but only required for accounting purposes.

8. Enter the **Buy** conditions for this promotion. For more information, see the help topic What the Customer Needs to Buy.

9. Enter the **Get** conditions for this promotion. For more information, see the help topic Item Promotion Get Conditions.

10. Enter coupon code details for this promotion. For more information, see the help topic Associating Coupon Codes With a SuitePromotion.

11. Enter usage limits for this promotion. For more information, see the help topic Setting Usage Limits on SuitePromotions.

12. Click **Save**. You can also do one of the following:

   - Click **Save & New** to save the form and create a new promotion.
   - Click **Save & Copy** to save the form and create a new promotion with the same data.

Item Promotion Example

Buy One, Get One Free (BOGO)

- **Description** – Customers are eligible for a 100% discount on an additional item when they buy at least two of that item.
- **Tagline** – Buy 1 T-shirt and get 1 T-shirt for free! Or Buy 2 for the price of 1!
- **Small print** – Discount applied to the cheapest T-shirt or T-shirts.

What the customer needs to buy

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

Field	Value
Buy Anything	Clear
Spend a minimum order amount or buy specific items	Select
Minimum Order Amount	–
Specific Items	Select
Item	T-shirt
Apply the discount every time the following number of units are bought at full price	Select
Units	1

What the customer will get

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

Field	Value
Discount Type	%
Discount Rate	100.00
Items to be discounted	T-shirt
Apply discount to	Cheapest

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Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirts	$10	–	$10
2 T-shirts	$20	$10 ($10 off the cheapest T-shirt)	$10
3 T-shirts	$30	$10 ($10 off the cheapest T-shirt)	$20
6 T-shirts	$60	$30 ($10 off each of the three cheapest T-shirts)	$30

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

Creating Fixed Price Item Promotions

Fixed price item promotions provide an alternative to offering a currency or percentage discount through a promotion. You can create promotions that offer items at a fixed promotional price.

For example, a promotion that offers any dress for $15 if a customer buys any T-shirt. Rather than entering a discount as a percentage or currency amount, a fixed price for the dress is entered. If the promotion is applied to an order that meets these criteria, the dress price is modified by calculating the amount of discount required to provide the dress for $15.

To create a fixed price item promotion:

1. Go to Lists > Marketing > Promotions > New.
2. Select **Fixed Price Item Promotion** from the SuitePromotions category.
3. Enter a name and description for this promotion.
4. Check the **Inactive** box if you want to make the promotion inactive but not deleted. If this box is checked the promotion will not be available for selection on a transaction.
5. Enter a start date and an end date for this promotion.

    After the end date, the promotion will no longer trigger discounts, and will no longer appear in the list of available promotions.
6. Select the combinability options for this promotion. For more information, see the help topic SuitePromotions Further Settings.
7. Check the **This promotion can be automatically applied** box if you want this promotion to be automatically applied to transactions.
8. In the **Discount Item for Accounting** field, select the discount item you want to assign to this promotion. The account on the discount item is impacted by the promotion's discount. This field is mandatory but only required for accounting purposes.
9. Enter the **Buy** conditions for this promotion. For more information, see the help topic What the Customer Needs to Buy.
10. Enter the **Get** conditions for this promotion. For more information, see the help topic Fixed Price Item Promotion Get Conditions.
11. Enter coupon code details for this promotion. For more information, see the help topic Associating Coupon Codes With a SuitePromotion.
12. Enter usage limits for this promotion. For more information, see the help topic Setting Usage Limits on SuitePromotions.

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13. Click **Save**. You can also do one of the following:
    - Click **Save & New** to save the form and create a new promotion.
    - Click **Save & Copy** to save the form and create a new promotion with the same data.

Fixed Price Item Promotion Example

Buy Items for a Discounted Fixed Price

- **Description** – Customers are eligible to buy any number of the same item for a fixed price without any buy conditions.
- **Tagline** – All T-shirts now only $8!

What the customer needs to buy

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

Field	Value
Buy Anything	Select
Spend a minimum order amount or buy specific items	Clear
Minimum Order Amount	Clear
Specific Items	Clear
Item	–
Apply the discount every time the following number of units are bought at full price	Clear
Units	–

What the customer will get

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

Field	Value
Fixed Price	8.00
Items to be discounted	T-shirt
Apply discount to	–

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirt	$10	$2	$8
2 T-shirts	$20	$4 ($2 off each T-shirt)	$16
3 T-shirts	$30	$6 ($2 off each T-shirt)	$24
6 T-shirts	$60	$12 ($2 off each T-shirt)	$48

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

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Creating Order Promotions

You can create order promotions that give customers discounts that are applied to the order total.

To create an order promotion:

1. Go to Lists > Marketing > Promotions > New.
2. Select **Order Promotion** from the SuitePromotions category.
3. Enter a name and description for this promotion.
4. Check the **Inactive** box if you want to make the promotion inactive but not deleted. If this box is checked the promotion will not be available for selection on a transaction.
5. Enter a start date and an end date for this promotion.

   After the end date, the promotion will no longer trigger discounts, and will no longer appear in the list of available promotions.
6. Select the combinability options for this promotion. For more information, see the help topic SuitePromotions Further Settings.
7. Check the **This promotion can be automatically applied** box if you want this promotion to be automatically applied to transactions.
8. In the **Discount Item for Accounting** field, select the discount item you want to assign to this promotion. The account on the discount item is impacted by the promotion's discount. This field is mandatory but only required for accounting purposes.
9. Enter the **Buy** conditions for this promotion. For more information, see the help topic What the Customer Needs to Buy.
10. Enter the **Get** conditions for this promotion. For more information, see the help topic Order Promotion Get Conditions.
11. Enter coupon code details for this promotion. For more information, see the help topic Associating Coupon Codes With a SuitePromotion.
12. Enter usage limits for this promotion. For more information, see the help topic Setting Usage Limits on SuitePromotions.
13. Click **Save**. You can also do one of the following:
    - Click **Save & New** to save the form and create a new promotion.
    - Click **Save & Copy** to save the form and create a new promotion with the same data.

Order Promotion Example

Flat Rate Discount on an Order if Minimum Order Amount is Met

- **Description** – Customers are eligible for a flat rate discount on any order over a certain value.
- **Tagline** – $10 off your order, when you spend $50 or more!

What the customer needs to buy

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

Field	Value
Buy Anything	Clear
Spend a minimum order amount or buy specific items	Select
Minimum Order Amount	50.00

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Field	Value
Specific Items	Clear
Item	–

What the customer will get

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

Field	Value
Discount Type	Flat
Discount Rate	10.00

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirt, 1 dress	$30	–	$30
2 T-shirts, 1 dress	$40	–	$40
3 T-shirts, 1 dress	$50	$10	$40
6 T-shirts, 2 dresses	$100	$10	$90

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

Creating Shipping Promotions

You can create shipping promotions that give customers free shipping for their transactions using a specified shipping method.

To create a shipping promotion:

1. Go to Lists > Marketing > Promotions > New.
2. Select **Shipping Promotion** from the SuitePromotions category.
3. Enter a name and description for this promotion.
4. Check the **Inactive** box if you want to make the promotion inactive but not deleted. If this box is checked the promotion will not be available for selection on a transaction.
5. Enter a start date and an end date for this promotion.

   After the end date, the promotion will no longer trigger discounts, and will no longer appear in the list of available promotions.
6. Select the combinability options for this promotion. For more information, see the help topic SuitePromotions Further Settings.
7. Check the **This promotion can be automatically applied** box if you want this promotion to be automatically applied to transactions.
8. Enter the **Buy** conditions for this promotion. For more information, see the help topic What the Customer Needs to Buy.
9. Enter the **Get** conditions for this promotion. For more information, see the help topic Shipping Promotion Get Conditions.

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10. Enter coupon code details for this promotion. For more information, see the help topic Associating Coupon Codes With a SuitePromotion.

11. Enter usage limits for this promotion. For more information, see the help topic Setting Usage Limits on SuitePromotions.

12. Click **Save**. You can also do one of the following:

    ▪ Click **Save & New** to save the form and create a new promotion.

    ▪ Click **Save & Copy** to save the form and create a new promotion with the same data.

Shipping Promotion Example

Free Shipping if a Specific Item is Included in the Order

▪ **Description** – Customers are eligible for free shipping when they buy a minimum number of a specific item.

▪ **Tagline** – Buy a T-shirt and get free shipping on your order!

What the customer needs to buy

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

Field	Value
Buy Anything	Clear
Spend a minimum order amount or buy specific items	Select
Minimum Order Amount	Clear
Specific Items	Select
Item	T-shirt

What the customer will get

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

Field	Value
Shipping Method	Select any available shipping method from the list (the selected shipping method will be free for any eligible order).

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

Creating Free Gift Promotions

You can create free gift promotions that give customers an item with 100% discount. The free gift is automatically added to the customer's order if the transaction is eligible.

> ℹ **Note:** Free gift promotions cannot be made exclusive, nor can they be excluded by other exclusive promotions.

To create a free gift promotion:

1. Go to Lists > Marketing > Promotions > New.

2. Select **Free Gift Promotion** from the SuitePromotions category.

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3. Enter a name and description for this promotion.

4. Check the **Inactive** box if you want to make the promotion inactive but not deleted. If this box is checked the promotion will not be available for selection on a transaction.

5. Enter a start date and an end date for this promotion.

   After the end date, the promotion will no longer trigger discounts, and will no longer appear in the list of available promotions.

6. Check the **This promotion can be automatically applied** box if you want this promotion to be automatically applied to transactions.

7. Enter the **Buy** conditions for this promotion. For more information, see the help topic What the Customer Needs to Buy.

8. Enter the **Get** conditions for this promotion. For more information, see the help topic Free Gift Get Conditions.

9. Enter coupon code details for this promotion. For more information, see the help topic Associating Coupon Codes With a SuitePromotion.

10. Enter usage limits for this promotion. For more information, see the help topic Setting Usage Limits on SuitePromotions.

11. Click **Save**. You can also do one of the following:

    ▪ Click **Save & New** to save the form and create a new promotion.

    ▪ Click **Save & Copy** to save the form and create a new promotion with the same data.

Free Gift Promotion Example

Free Gift With Any Order

▪ **Description** – Customers are eligible for a free gift with any order.

▪ **Tagline** – Get a free T-shirt with any order!

What the customer needs to buy

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

Field	Value
Buy Anything	Select
Spend a minimum order amount or buy specific items	Clear
Minimum Order Amount	Clear
Specific Items	Clear
Item	–
Apply the discount every time the following number of units are bought at full price	Clear
Units	–

What the customer will get

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

Field	Value
Free Gift	T-shirt Note, you cannot add parent matrix items as a free gift.

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Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Free gifts	Price after discount
1 T-shirt	$10	1 T-shirt	$10 (the T-shirt in the order is not discounted, an extra T-shirt is added to the order)
1 dress	$20	1 T-shirt	$20
1 T-shirt, 1 dress	$30	1 T-shirt	$30 (the T-shirt in the order is not discounted, an extra T-shirt is added to the order)
2 T-shirts, 1 dress	$40	1 T-shirt	$40 (the T-shirts in the order are not discounted, an extra T-shirt is added to the order)

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

Creating Standard Promotions

You can continue to create and apply standard promotions to a transaction, but remember they are not compatible with the Enhancements Introduced in SuitePromotions. For more information, see the help topic Migrating to SuitePromotions.

The standard promotion record contains the following sections:

- **Primary Information** – see the help topic Standard Promotions Primary Information.
- **Coupon Codes subtab** – see the help topic Associating Coupon Codes With a Standard Promotion.
- **Items subtab** – see the help topic Discounting Items With Standard Promotions.
- **Partners subtab** – see the help topic Associating Partners With a Standard Promotion.

For details regarding how to create a standard promotion, see the help topic Creating a Standard Promotion.

Standard Promotions Primary Information

This section provides the majority of details needed to set up the promotion, excluding those pertaining to coupon codes, and items or specific partners that will receive the discount.

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Field	Description
Custom Form	Select the promotion type. You can select one of the Suite promotion types (item, order, or shipping) or the Standard Promotion Code Form.
Name	Enter a name for the promotion.
Start Date	Enter the date from when the promotion is valid.
End Date	Enter the date after which the promotion is no longer valid.
Discount Item for Accounting	Select the discount item from the list. The account on the discount item is impacted by the promotion's discount. This field is mandatory but only required for accounting purposes.
%	Select this option to give the customer a percentage off the order.
Flat	Select this option to give the customer a flat rate discount off the order.
Discount Rate	Enter the amount to be discounted. This will either be a percentage or a currency amount depending on the type of discount selected with the previous options.
Each Customer Can use the Promotion	Select how many times a customer can use this promotion. Select from: ▪ One time only ▪ Unlimited amount of times
Free Shipping Method	Select a shipping method here to create a free shipping promotion.
Minimum Order Amount	Enter the amount that the customer must spend before the promotion becomes valid. If you use the Multiple Currencies feature, a subtab appears where you can set a different minimum order amount for each currency in which you do business.
Description	Enter a description of the promotion.
Location	Limit the eligibility of the promotion to one or more locations by entering the name of each location in this field. For more information, see the help topic Setting Where Promotions Can Be Used.
Available to All Customers	Check this box if you want this promotion's coupon codes to be able to be applied to transactions for any customer, even if a specific partner or marketing campaign has been designated for this promotion. If you prefer to make the promotion available to only a specific partner or marketing campaign, clear this box.
Inactive	Check this box to make this promotion inactive but not deleted. The promotion will not be available for selection on a transaction.
Display Line Discounts	Check this box if you want the following: ▪ the discount for this promotion to show as a line item on transactions ▪ to display strikethrough pricing in the shopping cart on web store orders

> **ⓘ Note:** When the Display Line Discounts box is checked, the discount total will not be shown in the order summary. When the box is cleared, the promotion discount will be shown only in the transaction-level total.
>
> If there are no items on the Items subtab, the promotion will be applied at the transaction level, regardless of whether the Display Line Discounts box is checked or not.

Associating Coupon Codes With a Standard Promotion

The Coupon Codes subtab is where you choose how many times your coupon codes can be used and where you import or generate coupon codes.

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To add coupon codes:

On the **Coupon Codes** subtab:

1. In the **Coupon Code Type** field, choose whether the coupon code for this promotion can be used more than one time (Multiple Uses), or can only be used one time (Single Use).
2. If you are entering a multi-use coupon code, enter the code in the **Coupon Code** field.
3. If you are entering single-use coupon codes, do one of the following:
   - Select a CSV file to import
   - Enter a code pattern and the number of codes you want to generate

For more information regarding coupon codes, see the help topic Coupon Codes.

Discounting Items With Standard Promotions

If you are associating a discount with a standard promotion and want the discount to apply only to certain items, select those items on the Items subtab.

To add a discount to specific items:

1. Click the **Items** subtab.
2. Click **Add Multiple** to select multiple items at the same time and add them to this list.

   When you attach items to a promotion with a discount, the code acts as an item coupon. Customers receive the discount only if they purchase the associated item or items.
3. You can also use this subtab to exclude items that you do not want to discount. Check the **Exclude Items** box to have the promotion and discount apply to all items except those you select here.

   Line discount promotions must include items on the **Items** subtab.

Associating Partners With a Standard Promotion

If a customer is associated with a partner, only that partner's promotions are available to the customer. Consider the following:

- A promotion can be created without associating it with a partner, making that promotion available to all customers not associated with a partner.
- A promotion can be added to a partner record, making that promotion available to all customers associated with that partner.
- Partners can be named on a promotion record, making that promotion available to only those customers associated with those partners.

  You can assign promotional discounts and associate them with partners. When you create sales transactions for customers tied to a partner, you can apply that partner's promotions. If you apply a promotion that has a discount attached to it, that discount appears in the Discount field and is deducted from the total.

The Partners subtab is where you choose specific partners to be associated with the promotion.

To add Partners to a promotion:

1. Click the **Partners** subtab.
2. In the **Partner** column, select a partner from the list you want to associate with this promotion.
3. Click **Add**.

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4. Repeat these steps for each partner you want to associate with this promotion.

5. Click **Save**.

Now, you can assign this promotion to lead, prospect, and customer records.

> ⚠️ **Important:** Make sure the Available to all customers box on the promotion form is not selected If you wish to make the promotion available to a specific partner. For more information, see the help topic Standard Promotions Primary Information.

Creating a Standard Promotion

You can create standard promotions to track special offers and marketing initiatives.

To create a standard promotion:

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

2. Enter a name, description, start date, and an end date for this promotion.

   After the end date, the promotion will no longer trigger discounts, and will no longer appear in the list of available promotions.

3. In the **Discount Item for Accounting** field, select the discount item you want to assign to this promotion. The account on the discount item is impacted by the promotion's discount. This field is mandatory but only required for accounting purposes.

4. In the **Discount Rate** field, enter the percentage discount or flat rate discount to be applied.

   > ℹ️ **Note:** The **Rate** field automatically fills with the rate of the discount item selected in the **Discount** field. This value can be can be overridden as needed.

5. In the **Each customer can use the promotion** field, choose one of the following:

   - **Unlimited amount of times** - the discount can be applied to multiple sales.

   - **One time only** - the discount can be used only one time by each customer.

6. The **Free Shipping Method** list includes all the shipping items available in your account. Select a shipping method here to create a free shipping promotion.

   The price of the shipping method you select is discounted from the order total after the customer enters the coupon code on a sales transaction or a web order.

7. In the **Minimum Order Amount** field, enter the amount that the customer must spend before the promotion becomes valid.

   If you use the **Multiple Currencies** feature, a subtab appears where you can set a different minimum order amount for each currency in which you do business.

8. Check the **Available to All Customers** box if you want this promotion's coupon codes to be able to be applied to transactions for any customer.

9. Check the **Inactive** box if you want to make the promotion inactive but not deleted. If this box is checked the promotion will not be available for selection on a transaction.

10. Check the **Display line discounts** box if you want the following:

    - the discount for this promotion to show as a line item on transactions

    - to display strikethrough pricing in the shopping cart on web store orders

    If you clear this box, the promotion discount will be shown only in the transaction-level total.

    A flat rate promotion code applies to the entire order.

    You must select items on the **Items** subtab of the promotion to use line discounts.

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> **ⓘ Note:** If you use line discount promotions, when you apply the promotion to a transaction, you must click **Calculate** to create the discount line before saving the transaction. Line discount promotions are not compatible with web services endpoints 2009.2 or earlier.

When you apply promotions to sales transactions, the correct discount appears in the **Discount** field on transactions. You can change or remove the discount from a transaction.

11. Enter coupon code details for this promotion. For more information, see the help topic Associating Coupon Codes With a Standard Promotion.

12. Enter details of any items that will be discounted with this promotion. For more information, see the help topic Discounting Items With Standard Promotions.

13. Enter details of specific partners that are eligible for this promotion. For more information, see the help topic Associating Partners With a Standard Promotion.

14. Click **Save**. You can also do one of the following:
    - Click **Save & New** to save the form and create a new promotion.
    - Click **Save & Copy** to save the form and create a new promotion with the same data.

Standard Promotion Example

Flat Rate Discount on a Specific Item if Minimum Order Amount is Met

- **Description** – Customers are eligible for a $5 off T–shirts when they spend $20 or more.
- **Tagline** – Spend $20, and get $5 off T-shirts!

What the customer needs to buy

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

Field	Value
Minimum Order Amount	20.00

What the customer will get

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

Field	Value
Discount Type	Flat
Discount Rate	5.00
On the **Items** subtab in the Items list	T-shirt

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirt	$10	-	$10
1 dress	$20	-	$20
1 T-shirt, 1 dress	$30	$5 ($5 off the T-shirt)	$25

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What the customer buys	Price before discount	Discount	Price after discount
4 T-shirts, 1 dress	$60	$20 ($5 off each T-shirt)	$40

Creating Advanced Promotions

You can continue to create and apply Advanced Promotions to a transaction, but remember they are not compatible with the Enhancements Introduced in SuitePromotions. For more information, see the help topic Migrating to SuitePromotions.

With the Advanced Promotions SuiteApp, you can create promotions that offer discounts on specific items or on order totals. You can also offer discounted shipping based on order criteria.

The Advanced Promotions SuiteApp also enables you to create tiered promotions that offer discounts that depend on which tier an order qualifies for. Tiers can be based on the number of items sold as well as on item or order totals.

Advanced Promotion Types

There are three types of promotions available with the Advanced Promotions SuiteApp:

- **Item-based promotions**

  After installing the Advanced Promotions SuiteApp, you must enable item-specific promotions. Go to Customization > Plug-ins > Manage Plug-ins > Promotions (Administrator), and then check the **Item Specific Promotion** box.

  With item-based promotions, you can offer percentage or currency amount discounts on items. You can also use this type of promotion to offer discounted shipping.

  Item-based promotions are reflected at the line item level in the shopping cart and on sales transactions.

  See the help topic Creating Item-Based Advanced Promotions.

- **Buy X, Get Y promotions**

  After installing the Advanced Promotions SuiteApp, you must enable Buy X, Get Y promotions. Go to Customization > Plug-ins > Manage Plug-ins > Promotions (Administrator), and then check the **Buy X Get Y promotion** box.

  Buy X, get Y promotions offer free items when certain order criteria are fulfilled. This includes "buy one, get one free" and similar discounts.

Buy X, Get Y promotions are reflected at the line item level in the shopping cart and on sales transactions.

See the help topic Creating Buy X, Get Y Advanced Promotions.

- **Order-based promotions**

Order-based promotions offer percentage or currency discounts at the order level and can be based on the order total or on items included in the order. You can also offer discounted shipping.

Order-based discounts are reflected in the order summary on sales transactions and website orders.

See the help topic Creating Order-Based Advanced Promotions.

The basic workflow for creating Advanced Promotions is as follows:
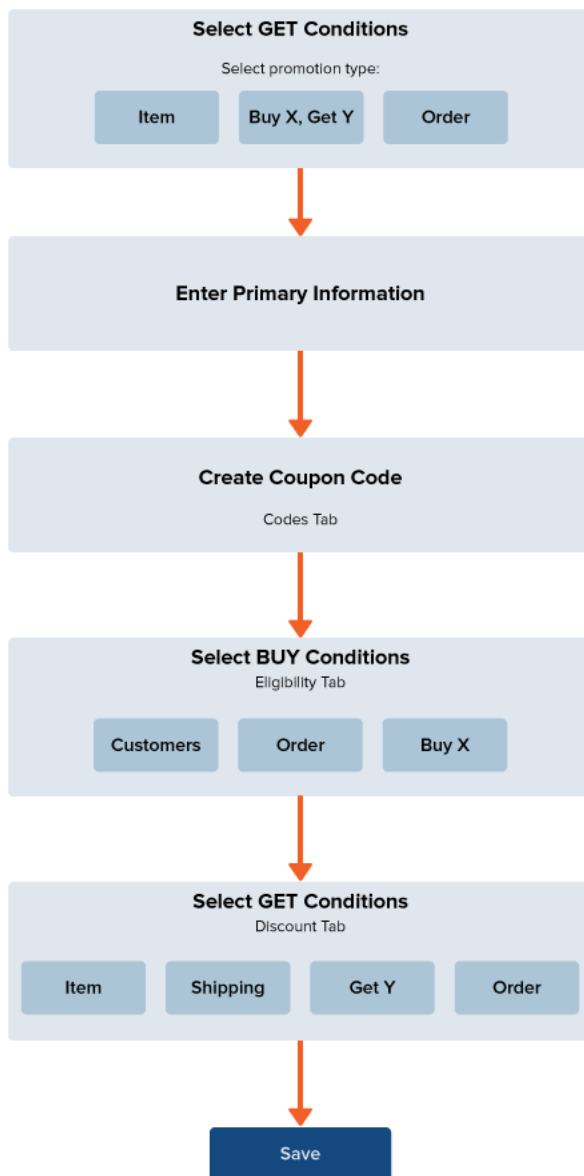
Each type of Advanced Promotion follows the same workflow. You select the promotion type, enter primary information, create a coupon code, enter the Buy conditions, and finally, specify further Get

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conditions. The main variation in the process occurs at stage five, where the get conditions available differ depending on the type of promotion.

The promotion records for all Advanced Promotions contain the following sections:

- **Primary Information** – see the help topic Advanced Promotions Primary Information.
- **Coupon Codes subtab** – see the help topic Associating Coupon Codes With an Advanced Promotion.
- **Eligibility subtab** – see the help topic Setting Up Promotion Eligibility for Advanced Promotions.
- **Discount subtab** – see the help topic Creating Promotion Discounts for Advanced Promotions.

Advanced Promotions Primary Information

This section provides the basic details needed to set up an Advanced Promotion, excluding those pertaining to coupon codes, eligibility, and discount.

Field	Description
Promotion Name	Enter a name for the promotion.
Description	Enter a description of the promotion.
Location	Limit the eligibility of the promotion to one or more locations by entering the name of each location in this field. For more information, see the help topic Setting Where Promotions Can Be Used.
Start Date	Enter the date from when the promotion is valid.
End Date	Enter the date after which the promotion is no longer valid.
Discount Item	Select the discount item from the list. The account on the discount item is impacted by the promotion's discount. This field is mandatory but only required for accounting purposes.
Each Customer Can use the Promotion	Select how many times a customer can use this promotion. Select from: - One time only - Unlimited amount of times
Site	Limit the eligibility of the promotion to one or more web sites by entering the name of each web site in this field. For more information, see the help topic Setting Where Promotions Can Be Used.
Inactive	Check this box to make this promotion inactive but not deleted. The promotion will not be available for selection on a transaction.
Set Fixed Price	Check this box to create a Fixed Price Advanced Promotion, see the help topic Creating Fixed Price Advanced Promotions.

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Field	Description
Create Tiers	Check this box to create a Tiered promotion, see the help topic Creating Tiered Promotions.

Associating Coupon Codes With an Advanced Promotion

The Coupon Codes subtab is where you choose how many times your coupon codes can be used and where you import or generate coupon codes.

To add coupon codes:

On the **Coupon Codes** subtab:

1. In the **Coupon Code Type** field, choose whether the coupon code for this promotion can be used more than one time (Multiple Uses), or can only be used one time (Single Use).
2. If you are entering a multi-use coupon code, enter the code in the **Coupon Code** field.
3. If you are entering single-use coupon codes, do one of the following:
   - Select a CSV file to import
   - Enter a code pattern and the number of codes you want to generate

For more information regarding coupon codes, see the help topic Coupon Codes.

Setting Up Promotion Eligibility for Advanced Promotions

You set a promotion's eligibility requirements on the Eligibility subtab of the promotion record. A promotion can be applied only to an order that meets these eligibility requirements.

First, you choose which customers are eligible for the promotion. You can set criteria based on customer saved searches, or you can choose specific customers.

If you are creating a tiered promotion, you set up the tiers on the Order subtab under the Eligibility subtab.

> **Note:** If you make no changes to the settings on the Eligibility subtab, the promotion can be applied to any order by any customer.

To choose which customers are eligible for a promotion:

1. Click the **Eligibility** subtab.

   The **Customers** subtab is where you choose which customers are eligible for the promotion. You add criteria in the form of saved searches or select lists of customers.

2. In the **Apply** field select one of the following:
   - **If customer matches any criterion** – Select this option if a customer must be included in only one of the searches or lists you add below to be eligible.
   - **If customer matches all criteria** – Select this option if a customer must be included in all of the searches and lists you add below to be eligible for this promotion.

3. In the **Add Customer Criteria** field, choose one of the following:
   - **Select Customers** – to select specific customers to add to the eligibility subtab.

     In the **Customer ID** field, select the customers you want to add to the list of criteria. Press and hold CTRL to select multiple customers.

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- **Select Customer Saved Search** – to add an existing customer saved search to the list.

  In the **Customer Segment** field, select the customer saved search you want to add to the list of criteria. You can only choose public searches for criteria.

  > **ⓘ Note:** Because these customers are defined by saved search criteria, the list of eligible customers can change. If you are distributing coupon codes to a recipient group, be sure that you use the same saved search to define the campaign recipients that you use for customer eligibility.

- **Create New Customer Search** – to create a new customer saved search to add to the list of criteria.

  Create a saved search to add to the list of criteria. You can choose only public searches for criteria.

4. In the popup window, click **Save**.
5. Repeat steps 3 and 4 for each customer criterion you want to add.

Next, you can select order requirements for eligibility.

To set requirements for the orders that are eligible for the promotion:

1. Click the **Eligibility** subtab, click the **Order** subtab if you are creating an item- or order-based promotion. Click the **Buy X** subtab if you are creating a Buy X, Get Y promotion.

   On this subtab, you can set the order requirements for this promotion. These criteria can be based on the order total, on the number of items purchased, or the line item amount for an item or items. For Buy X, Get Y promotions, you can only a limit based on the total number of units purchased.

2. In the **Apply** field select one of the following:

   - **If order matches any criterion** – Select this option if an order must only meet one of the criteria you add below to be eligible.

   - **If order matches all criteria** – Select this option if the promotion is eligible if all of the item criteria you list below are met. Select this option if an order must be included in all of the searches and lists you add below to be eligible for this promotion.

   > **ⓘ Note:** This field is not available for tiered promotions.

3. In the **Add Order Criteria** field (item- and order-based promotions) or the **Add Buy X Criteria** field (Buy X, Get Y promotions), choose one of the following:

   - **Set Order Total** – to set order criteria based on the order total or on the total number of units purchased.

   - **Select Items** – to set criteria based on specific items.

     In the **Items** field, select the items you want to base your order criteria on, and then enter the minimum purchase requirement for the items you selected. Click **Add Another** to add items for this criterion.

     Then enter the minimum purchase for those items. This can be either a currency amount or a number of units.

   - **Select Item Saved Search** – to add criteria for the items in an existing item saved search.

     In the Item Saved Search field, select the item saved search you want to base criteria on.

     Then enter the minimum purchase for those items. This can be either a currency amount or a number of units.

   - **Create New Item Saved Search** – to create a new item saved search to add to the list

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Create a saved search to add to the list of criteria, and set the minimum purchase quantity (units) or currency amounts for the items in the search.

> **ⓘ Note:** You can choose only public searches for criteria.
>
> You cannot use an item saved search that has grouped or summarized results, see the help topic Defining Summary Types to Roll Up Search Results.

If you use the **Multiple Currencies** feature, you can add minimum purchase amounts for each currency you do business in.

4. In the popup window, click **Save**.

5. Repeat steps 3 and 4 to add order criteria.

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

6. Click **Save**.

Creating Promotion Discounts for Advanced Promotions

After you have entered the primary information and set the eligibility criteria, you can set up the promotion discount. The discount options available depend on the type of promotion you are creating:

- Creating Item-Based Advanced Promotions
- Creating Item-Based Shipping Advanced Promotions
- Creating Buy X, Get Y Advanced Promotions
- Creating Order-Based Advanced Promotions
- Creating Tiered Promotions
- Creating Fixed Price Advanced Promotions

Creating Item-Based Advanced Promotions

Item-based promotions enable you to offer discounts on items included in an order. These promotions create line-level discounts for each item defined on the promotion.

Item-based promotions may include the following:

- A percentage or amount off an item or items (for example, 40% off all laptops).
- A percentage or amount off an item items, if certain order criteria are met (for example, "buy one, get one free" or "50% off monitors on orders over $600).
- An item-specific promotional discount for a segment of customers (for example, customers who registered in the last twelve months get 20% off desktop computers).
- A promotional discount off an item or items for a segment of customers, if certain order criteria are met (for example, customers who registered in the last month who buy one item, get another free).
- A discount on the price and shipping cost of an item or items (20% off the total and free shipping on all computer monitors).

> **ⓘ Note:** You can only have one item discount and one shipping discount per promotion.

To create an item-based promotion:

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

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2. Select **Item-Based Promotions** from the Standard Promotions and Advanced Promotions category.

3. Enter the primary information for this promotion, see the help topic Advanced Promotions Primary Information.

4. On the **Codes** subtab, set up the coupon codes for the promotion. For more information, see the help topic Associating Coupon Codes With an Advanced Promotion.

5. On the **Eligibility** subtab, set up the eligibility criteria for the promotion. For more information, see the help topic Setting Up Promotion Eligibility for Advanced Promotions.

6. Click the **Discount** subtab.

7. In the **Add Item Discount** field, choose the item you are offering a discount on in one of the following ways:

   ▪ **Select Items** – Select the items you want to offer a discount on. Click **Add Another** to select additional items.

   ▪ **Select Saved Search** – Choose an existing item saved search that includes the items you are offering a discount on.

   ▪ **Create New Item Saved Search** – Create an item saved search that includes the items you are offering a discount on.

   > ⓘ **Note:** You can choose only public searches to define discounts.

8. In the popup, check the **Apply Discount to Highest Valued Item** option to apply the discount to the most expensive item in the order. Clear this box to apply the discount to the least expensive item on the order.

   > ⚠ **Important:** This setting only affects promotions with defined unit limits.

9. Check the **Exclude Items** box to apply the promotion and discount to all items on the order, except those you select here. This option is useful when you have a large number of products on sale, and you want to exclude only a few items from the promotional discount.

10. In the **Promotional Offer** field, enter the percentage or amount off for those items. Click **Add Another** if you want to enter a maximum discount amount in additional currencies.

11. If you want to limit the promotion amount, do one of the following:

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- **Limit** – Enter the maximum number (units) of items you are offering the discount on. This is required if you want to apply the discount to the highest value item on the order.
- **Up to a Total Discount of** – Enter the maximum currency amount discount this promotion gives. If you use the **Multiple Currencies** feature, you can enter the maximum discount in any currency you do business in.

12. Click **Save**.

To add a shipping discount, choose from the options provided in the Add Shipping Discount field. For more information, see the help topic Creating Item-Based Shipping Advanced Promotions.

Item-Based Advanced Promotion Example

Flat Rate Discount on one Item – Advanced Promotions

- **Description** – Customers are eligible for a flat rate discount on an item when they buy a different item.
- **Tagline** – Buy a T-shirt and get $5 off a dress!

What the customer needs to buy

The following table shows how to set up the Buy conditions for this type of promotion with the Advanced Promotions SuiteApp.

Field	Value
On the **Eligibility** tab click the **Order** subtab	
Apply	If order matches any criterion
Add Order Criteria	Select Items
Item	T-shirt
Minimum Purchase	1 Unit

What the customer will get

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

Field	Value
Click the **Discount** subtab	
Add Item Criteria	Select Items
Item	Dress
Exclude Items	-

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirt, 1 dress	$30	$5	$25

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirt, 2 dresses	$50	$5	$45
1 T-shirt, 3 dresses	$70	$5	$65
2 T-shirts, 3 dresses	$80	$5	$75

Creating Item-Based Shipping Advanced Promotions

You can create item-based promotions that provide shipping discounts on certain shipping methods. In this way, your customers can use a coupon code that applies discounted shipping costs to an item on the order. You can also create a coupon code that ships a particular item on an order for free, different from the rest of the items in the order.

> ℹ **Note:** You can have only one shipping discount per promotion. You can select either a shipping discount or item-specific free shipping. You cannot stack multiple shipping discounts on one promotion.

To create an item-based shipping promotion:

1. Go to Campaigns > Marketing > Promotions > New.
2. Select **Item-Based Promotions** from the Standard Promotions and Advanced Promotions category.
3. Enter the primary information for this promotion, see the help topic Advanced Promotions Primary Information.
4. On the **Codes** subtab, set up the coupon codes for the promotion. For more information, see the help topic Associating Coupon Codes With an Advanced Promotion.
5. On the **Eligibility** subtab, set up the eligibility criteria for the promotion. For more information, see the help topic Setting Up Promotion Eligibility for Advanced Promotions.
6. Click the **Discount** subtab.
7. In the **Add Shipping Discount** field, select one of the following:
   - New Shipping Discount
   - New Item Specific Free Shipping
   - Select Item Saved Search for Free Shipping
8. If you use a saved search, you can preview a list of items associated with the shipping method you selected.
9. Click **Save.**

New Shipping Discount

Choose this option to apply a shipping discount to the shipping methods you choose. You can enter the discounted shipping amount or enter a discount percentage.

To add a new shipping discount:

1. Choose **Percent Off** or **Set Amount**.

   If you enter a percentage, the shipping amount is discounted by this percentage. If you enter a currency amount, this is used as the shipping amount.
2. Select one or more **Shipping Methods**.

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3. Click **Save**.

> ℹ **Note:** This discount applies to the order only if the shipping method selected on the promotion matches the shipping method on the transaction.

New Item Specific Free Shipping

Choose this option to assign free shipping to certain items on the order. Your customers can purchase items using a coupon code that ships an item for free, different from the rest of the items in the order. For example, you can configure a promotion code so that a customer can purchase Items X, Y, and Z, where item Z is shipped for free.

The Exclude Item From Rate Request column on the Items subtab lets you exclude line items from the shipping cost calculation when the box is checked. After an item-specific free shipping promotion is applied to a transaction, the box is checked for the line item that is to receive free shipping. This column is shown on the Items subtab by default on the standard sales order form. When using a customized sales order form, make sure this column is added.

To add item specific free shipping:

1. Select an item in the **Item** list.
2. Select one or more Shipping Methods to offer for free with this item.
3. Click **Save** to add the item and associated free shipping method to the list on the **Discount** subtab.

Customers can use the coupon code associated with this promotion to order the item free of shipping charge.

Select Item Saved Search for Free Shipping

This option applies a free shipping method to a set of items returned in saved search results.

To create a free shipping promotion for items in a saved search:

1. Select an **Item Saved Search** from the list. Only saved searches that you already created and marked public appear in the list.
2. Select one or more **Shipping Methods**.
3. Click **Save**.

For shipping promotions based on saved search results, click the link in the preview column to see the list of items selected for the free shipping promotion.

Creating Buy X, Get Y Advanced Promotions

Buy X, Get Y promotions enable you to offer discounts on the order total. Eligibility for order-based promotions can be based on the items in an order or on the order total.

This type of promotion includes the following:

- "Buy 1, get 1 free" offers (for example, buy a laptop, get a free wireless mouse).
- A currency or percentage off item if a set number of items are also purchased (for example, buy a camera, and get 50% off any camera bag).

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> 🛈 **Note:** You can only have one discount and one shipping discount per promotion.

To create a Buy X, Get Y promotion:

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

2. Select **Buy X, Get Y Promotions** from the Standard Promotions and Advanced Promotions category.

3. Enter the primary information for this promotion, see the help topic Advanced Promotions Primary Information.

4. On the **Codes** subtab, set up the coupon codes for the promotion. For more information, see the help topic Associating Coupon Codes With an Advanced Promotion.

5. On the **Eligibility** subtab, set up the eligibility criteria for the promotion. For more information, see the help topic Setting Up Promotion Eligibility for Advanced Promotions.

6. Click the **Discount** subtab.

7. In the **Get Y Discount** field, select one of the following:

   - **Select Items** – Select the items you want to offer a discount on. Click **Add Another** to select additional items.

   - **Select Saved Search** – Choose an existing item saved search that includes the items you are offering a discount on.

   - **Create New Item Saved Search** – Create an item saved search that includes the items you are offering a discount on.

     > 🛈 **Note:** You can choose only public searches to define discounts.

8. In the popup, check the **Apply Discount to Highest Valued Item** box to apply the discount to the most expensive item in the order. Clear this box to apply the discount to the least expensive item on the order.

   > ⚠ **Important:** This option affects only those promotions with defined unit limits.

9. Check the **Exclude Items** box to apply the promotion and discount to all items on the order, except those you select here. This option is useful when you have a large number of products on sale, and you want to exclude only a few items from the promotional discount.

10. In the **Promotional Offer** field, enter the percentage or amount off you are offering with this promotion. Click **Add Another** if you want to enter a maximum discount amount in additional currencies.

11. In the **Limit** field, enter the number of items you are offering a discount on. This is required if you want to apply the discount to the highest value item on the order.

12. Click **Save**.

To add a shipping discount, choose from the options provided in the Add Shipping Discount field. For more information, see the help topic Creating Item-Based Shipping Advanced Promotions.

Buy X, Get Y Advanced Promotion Example

Buy One, Get One Free – Advanced Promotions

- **Description** – Customers are eligible for a 100% discount on a specific item when they buy one of that item.

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- **Tagline** – Buy 1 T-shirt and get 1 T-shirt for free! Or, Buy 2 for the price of 1!

What the customer needs to buy

The following table shows how to set up the Buy conditions for this type of promotion with the Advanced Promotions SuiteApp.

Field	Value
On the **Eligibility** tab click the **Buy X** subtab	
Apply	If order matches any criterion
Add Buy X Criteria	Select Items
Item	T-shirt
Minimum Purchase	1 Unit

What the customer will get

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

Field	Value
Click the **Discount** subtab	
Get Y Discount	Select Items
Item	T-shirt
Exclude Items	-
Promotional Offer	100%
Limit	-

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
1 T-shirt	$10	-	$10
2 T-shirts	$20	$10	$10
3 T-shirts	$30	$10	$20
6 T-shirts	$60	$30	$30

Creating Order-Based Advanced Promotions

Order promotions enable you to offer discounts on the order total. Eligibility for order-based promotions can be based on the items in an order or on the order total.

Order-based promotions include the following:

- A percentage or amount off the entire order (for example, a 20% off coupon).
- A percentage or amount off an order if certain order criteria are met (for example, 25% off orders of $500, or 10% off an order when you purchase a new laptop).

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- An order discount for a segment of customers (for example, customers who registered in the last month receive 25% off).
- An order discount for a segment of customers if certain order criteria are met (for example, all customers in California receive $50 off of orders of $500).
- Free shipping on orders that meet certain requirements (free shipping on orders of $100).

> ℹ **Note:** Eligibility for Order-Based Advanced Promotions is evaluated before discounts are applied. Therefore, if you have an order that is eligible for free shipping when a minimum order amount is met, and you apply a promotion that reduces the price of the order below the minimum free shipping requirement, then the order remains eligible for free shipping.

To create an order-based promotion:

1. Go to Campaigns > Marketing > Promotions > New.
2. Select **Order-Based Promotions** from the Standard Promotions and Advanced Promotions category.
3. Enter the primary information for this promotion, see the help topic Advanced Promotions Primary Information.
4. On the **Codes** subtab, set up the coupon codes for the promotion. For more information, see the help topic Associating Coupon Codes With an Advanced Promotion.
5. On the **Eligibility** subtab, set up the eligibility criteria for the promotion. For more information, see the help topic Setting Up Promotion Eligibility for Advanced Promotions.
6. Click the **Discount** subtab.
7. In the **Add Order Discount** field, select **New Order Discount**:
8. In the popup, in the **Promotional Offer** field, enter the percentage or amount off you are offering with this promotion.
9. In the **Discount Up To** field, enter the maximum discount amount for this promotion. For example, you might limit the discount to $200. This option is only available when you set up a percentage discount.
10. Click **Add Another** if you want to enter a maximum discount amount for additional currencies.

    You can designate maximum discounts for each currency you do business in.
11. Click **Save**.

To add a shipping discount, choose from the options provided in the Add Shipping Discount field. For more information, see the help topic Creating Item-Based Shipping Advanced Promotions.

Order-Based Advanced Promotion Example

Percentage Off an Order – Advanced Promotions

- **Description** – Customers are eligible for a percentage off any order when they buy a specific item.
- **Tagline** – Buy a T-shirt and get 10% off your order!

What the customer needs to buy

The following table shows how to set up the Buy conditions for this type of promotion with the Advanced Promotions SuiteApp.

Field	Value
On the **Eligibility** tab click the **Order** subtab	

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Field	Value
Apply	If order matches any criterion
Add Order Criteria	Select Items
Item	T-shirt
Minimum Purchase	1 Unit

What the customer will get

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

Field	Value
Click the **Discount** subtab	
Add Order Discount	New Order Discount
Promotional Offer	10%
Discount Up To	-

Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

What the customer buys	Price before discount	Discount	Price after discount
1 Dress	$20	-	$20
1 T-shirt, 1 dress	$30	$3	$27
2 T-shirts, 2 dresses	$60	$6	$54
3 T-shirts, 2 dresses	$70	$7	$63

Creating Tiered Promotions

To create a tiered promotion, you need to:

1. Create tiers to define the promotion criteria. See the help topic Creating Tiers.
2. Add discounts to the tiers. See the help topic Adding Discounts to Tiers.

If you use the Multiple Currencies feature, and you want to base your tiers on multiple currencies, you must make sure that each tier includes a price in each of those currencies. If your promotion discount is in the form of a currency amount, you must include an amount for each of the currencies you used to define your tiers.

Creating Tiers

To create a tier:

1. Check the **Create Tiers** box on the promotion record.
2. Click the **Eligibility** subtab and add order criteria to define your tiers. Tiers can be defined by the number of units sold or by currency amounts.

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> ⚠️ **Important:** Adding a large number of eligible items to a tiered promotion can result in an error. Use a saved search instead of adding items manually. For more information regarding saved searches, see the help topic Saved Searches.

3. To define multiple currency amounts for your first tier:

    a. Enter the first currency amount and select the currency.

    b. Click **Add Another** to add an amount in a different currency for this tier.

    c. Repeat these steps for each currency you use to define this tier.

4. After you have added all of the currency amounts for the first tier or item quantities, click the add icon next to the tier to create an additional tier. A promotion can have up to 10 tiers.

> ℹ️ **Note:** Promotion tiers must be created in increasing order. If you define your first tier using currency amounts, every other tier must include amounts in each of the currencies you used for the first tier.

5. When you have added the tiers, click **Save** in the popup.

    Your tiers display on the **Order** subtab.

Adding Discounts to Tiers

To add a discount to a tier:

1. Click the **Discount** subtab.

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2. In the **Add Item Discount** field, choose how to define your discount. The tiers you created on the **Eligibility** subtab are shown.

> ⚠ **Important:** Adding a large number of eligible items to a tiered promotion can result in an error. Use a saved search instead of adding items manually. For more information regarding saved searches, see the help topic Saved Searches.

3. If you are creating an Item-Based or Buy X, Get Y promotion, note the following:

   - Check the **Apply Discount to Highest Valued Item** box to apply the discount to the most expensive item in the order. Clear this box to apply the discount to the least expensive item on the order. This setting affects only those promotions with defined unit limits.

   - Check the **Exclude Items** box to apply the promotion and discount to all items on the order, except those you select here. This option is useful when you have a large number of products on sale, and you want to exclude only a few items from the promotional discount.

   - Choose **Limit** in the Select Items popup window. Set the maximum number (units) of items you are offering the discount on.

4. Choose whether you are entering the promotion discounts as currency amounts or percentage discounts.

5. Enter the discount you are offering for each tier.

   If you are entering currency amount discounts, you must enter a currency amount for each tier you defined on the **Eligibility** subtab. If you do not enter a discount amount for a certain currency, no discount is applied on an order in that currency, even if the order qualifies for that tier.

6. When you have entered discounts for each tier, click **Save.**

   The discount for each tier is listed on the **Discount** subtab.

7. Click **Save**.

> ℹ **Note:** You cannot create tiered promotions for Buy X, Get Y promotions.

To make a change to a promotion's tiers, click Edit next to the list of tiers on the Eligibility or Discount subtab. If you change the tiers on the Eligibility subtab, you must re-enter the discounts for each tier.

Creating Fixed Price Advanced Promotions

As an alternative to offering a currency or percentage discount through a promotion, you can offer items at a fixed promotional price.

For example, Wolfe Electronics has a promotion that offers any Miraview computer monitor for $100 if they buy any desktop computer. Rather than entering a discount as a percentage or currency amount, Wolfe enters a price for the monitor. If the promotion is applied to an order that meets these criteria, the monitor price is set to $100.

Fixed price promotions create price adjustment lines after each item line on a transaction that includes items that were configured on the Discount subtab of the promotion.

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These price adjustments are reflected in the transaction subtotal rather than as discounts.

> **(i) Note:** Fixed pricing is only available for item-based promotions and cannot include discount tiers.

To create a fixed price promotion:

1. Create an item-based promotion.
2. Check the **Set Fixed Price** box.

3. Enter other primary information and a coupon code for this promotion.
4. Set up the eligibility rules:
   a. Click the **Eligibility** subtab and
   b. Click the **Order** subtab, and enter order criteria for the promotion.

      Order criteria for fixed price promotions can be based on the order total or on the number of items sold. In the example above, the order criteria include one unit of any desktop computer item. For more information, see the help topic Setting Up Promotion Eligibility for Advanced Promotions.
5. Set up the discount:
   a. Click the **Discount** subtab.
   b. In the **Add Item Discount** field, choose one of the options for selecting items, and define the item discount.
   c. In the popup, check the **Apply Discount to Highest Valued Item** box to apply the discount to the most expensive item in the order. Clear this box to apply the discount to the least expensive item on the order.

      > **⚠ Important:** This setting only affects promotions with defined unit limits

   d. In the **Item** field, select the items you are setting the fixed price for.
   e. Check the **Exclude Items** box to apply the promotion and discount to all items on the order, except those you select here. This option is useful when you have a large number of products on sale, and you want to exclude only a few items from the promotional discount.
   f. In the **Promotional Offer** field, enter the percentage or amount off for those items. Click **Add Another** if you want to enter a maximum discount amount in additional currencies.
   g. To set limits on the promotion, choose one of the following:

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- **Limit** – Enter the maximum number (units) of items you are offering the discount on. This is required if you want to apply the discount to the highest value item on the order.

- **Up to a Total Discount of** – Enter the maximum currency amount discount this promotion gives. If you use the **Multiple Currencies** feature, you can enter the maximum discount in any currency you do business in.

h. Click **Save**.

6. Click **Save** on the promotion record.

When you apply a fixed price promotion to a transaction, a discount line with the price adjustment is added after each item configured on the Discount subtab of the promotion.

Fixed Price Advanced Promotions Example

Fixed Price on Eligible Items – Advanced Promotions

- **Description** – Customers are eligible for a specific item or items when they buy a minimum quantity.

- **Tagline** – Save $15 when you buy 5 or more T-shirts!

What the customer needs to buy

The following table shows how to set up the Buy conditions for this type of promotion with the Advanced Promotions SuiteApp.

Field	Value
Check the **Set Fixed Price** box	
On the **Eligibility** subtab click the **Order** subtab	
Apply	If order matches any criterion
Add Order Criteria	Select Items
Select Items	T-shirt
Minimum Purchase	5 Units

What the customer will get

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

Field	Value
Click the **Discount** subtab	
Add Item Discount	Select Items
Item	T-shirt
Exclude Items	-
Promotional Offer	7 USD
Limit	-

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Examples of the discount provided

The following table shows examples of the discount that this type of promotion provides when various quantities of items are added to a transaction.

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

Applying Promotions and Discounts to a Transaction

Promotions can be applied to a transaction in a variety of ways:

- You can apply promotion codes to a web store order, and at the point of sale. For more information, see the help topic Promotions and Websites.

- Promotions can be stacked, so you can have more than one eligible promotion per transaction. For more information, see the help topic Applying Stackable Promotions.

- Promotions can be manually or automatically applied. For more information, see the help topic Automatically Applying Promotions.

Discounts are applied to a transaction automatically when a promotion is applied. The value of the discount is dependent on how tax is calculated in your region, see the help topic How Promotion Discounts Are Applied to Transactions.

Free gift SuitePromotions automatically add the free item to a transaction. Promotions that offer an item or items for free – but are not created using the free gift SuitePromotion type – do not automatically add the item to a transaction. For more information, see the help topic Applying Automatically Added Free Gift Items.

Promotions and Websites

When a promotion has a discount, the code can be used as a coupon code in your NetSuite web store. Web store shoppers can enter a coupon code on the shipping method page or on the last page of checkout.

> ⓘ **Note:** Coupon codes entered on web store orders are not case sensitive.

For more information regarding coupon codes, see the help topic Coupon Codes.

Line discounts are shown as strikethrough prices in the shopping cart on web store orders.

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Only a percentage discount will register as line-level, and create strikeout pricing on the Web Store. A flat rate promotion code applies to the total order. To remove the Coupon Code fields from your shopping cart, you must inactivate or apply end dates to all of your promotions and turn off the Promotion Codes feature.

Applying Stackable Promotions

In this section, you will learn how to utilize the SuitePromotions feature to apply multiple promotions to one transaction.

> ℹ️ **Note:** Before you can apply promotions to a transaction, you must first enter a customer, and select at least one item on the transaction.

To apply multiple promotions on a transaction:

1. Click the **Promotions** subtab.
2. In the **Promotion** column, select a promotion from the list. This list is filtered to only show the promotions that can be applied to the transaction.
3. Click **Add**.
4. Repeat steps 2 through 3 for each promotion you want to add.
5. Click **Save**.

Combination With Other Promotions

All promotions can be combined on one transaction by default if this transaction is eligible. However, you can prevent any promotion from being combined with other promotions. This functionality is

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useful, for example, when you have promotions that offer large order-level discounts that you do not want to combine with other promotions.

To prevent a promotion from being combined with other promotions, go to Lists > Marketing > Promotions, edit the promotion and check the **Exclusive Promotion** box.

To prevent Item Promotions from being combined with other eligible promotions for the same item on a transaction, check the **Item Line Exclusive Promotion** box.

To prevent Order Promotions from being combined with other eligible order type promotions on a transaction, check the **Order Type Exclusive Promotion** box.

To prevent Shipping Promotions from being combined with other eligible shipping type promotions on a transaction, check the **Shipping Type Exclusive Promotion** box.

For more information on how exclusive promotions are automatically applied, see the help topic How Best Offer is Applied.

Shipping Discounts and Stackable Promotions

Shipping discounts are applied to transactions in the form of promotions that offer free shipping on a particular shipping method. Currently, only promotions that offer 100% discount on a particular shipping method can be created and applied.

There is a new column on the Promotions subtab that provides specific information regarding the value of the shipping discount provided by applied promotions:

- **Shipping Discount:** shows the monetary value of the discount provided by the promotion on the shipping costs

When you add a shipping promotion to a transaction, the shipping discount is calculated automatically unless:

- The shipping method selected on the Shipping subtab does not match the shipping method eligible for a discount in the promotion.

- The shipping discount is unknown because the shipping method must be calculated in real time. In such instances, the Shipping Discount column shows that the value is "Pending shipping cost calculation" and you must calculate the shipping cost to show the value of the shipping discount.

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To calculate the shipping discount when the shipping method must be calculated in real time:

1. Click the **Shipping** subtab.
2. Click the **Calculator** icon to calculate the shipping costs. The value of the shipping discount is added to the Shipping Discount column for the matching promotion on the Promotions subtab, and the shipping cost is adjusted in the transaction summary.

If there is a conflict involving exclusive promotions and shipping promotions when automatically applying promotions to a transaction, you must manually calculate shipping costs. For information, see the help topic Calculating Shipping Costs Before Automatically Applying Promotions.

After adding a shipping promotion to a transaction, NetSuite does not automatically update the shipping method on the Shipping tab. To ensure the customer benefits from the discount provided by the shipping promotion, you must manually add the shipping method eligible for the promotion on the Shipping tab.

To manually add the shipping discount associated with a shipping promotion:

1. Click the **Shipping** subtab.
2. In the **Shipping Carrier** field, select a shipping carrier that is eligible for free shipping in a shipping promotion.
3. In the **Shipping Method** field, select a shipping method that is eligible for free shipping in a shipping promotion. The value of the shipping discount is added to the Shipping Discount column for the matching promotion on the Promotions subtab and the shipping cost is adjusted in the transaction summary.

Automatically Applying Promotions

After you have set up your automatically applied promotions, they can be added to a transaction automatically using the Auto-Apply Promotions feature.

Making a Promotion Available for Automatic Applying

To make a promotion available for automatic applying to a transaction, on the promotion form check the **This promotion can be automatically applied** box.

If you want customers to provide a coupon code at the point of sale to be eligible for the promotion, do not check the **This promotion can be automatically applied** box on the promotion form.

Automatically Applying Promotions to a Transaction

Promotions are considered for automatic application on a transaction only if they meet the following criteria:

- The **Inactive** box is cleared on the promotion.
- The **This promotion can be automatically applied** box is checked on the promotion.

However, not all promotions that the transaction is eligible for are applied. For more information, see the help topic How Best Offer is Applied.

To automatically apply promotions to a transaction:

1. Go to Transactions > Sales > Enter Sales Order.
2. Create a sales order.
3. Select a customer.
4. On the **Items** subtab, add the items to be purchased in this transaction.

5. On the **Promotions** subtab, the **Automatically Apply Promotions** box is checked by default to indicate that eligible promotions have been automatically added to the transaction.

⚠️ **Important:** A customer and at least one item must be added to a transaction before promotions can be automatically applied.

ℹ️ **Note:** You can also add SuitePromotions manually when the **Automatically Apply Promotions** box is checked. Select the promotion from the list and click the **Add** button to manually add the promotion discount. When a standard or Advanced Promotion is manually added to a transaction the **Automatically Apply Promotions** box is disabled. Standard and Advanced promotions cannot be added if another promotion has already been automatically applied and the **Automatically Apply Promotions** box is checked.

6. After you have finished adding promotions to the transaction, click **Save**.

How Best Offer is Applied

NetSuite provides flexible control over how promotions are added to transactions. You can utilize the Auto-Apply Promotions feature to ensure promotions are quickly added to a transaction at the point of sale. You can, however, also manually add promotions as needed.

For example, when you have promotions that require a customer to provide a coupon code at the point of sale to be eligible for that promotion's discount. Manually adding promotions ensures that you have complete control over the discount provided to your customers, so they are guaranteed to be able to receive the best offer available.

Free gift promotions are not considered by the Best Offer logic. A free gift promotion cannot be exclusive, nor excluded by other exclusive promotions and is therefore always considered for eligibility.

Whenever promotions are added automatically or manually, it is important to consider if the promotions can be combined. NetSuite manages exclusive promotions in the following way:

- When the Automatically Apply Promotions box is checked:
  - An exclusive promotion is not applied unless there are no other promotions offering a greater discount for the customer, either alone or when combined with other promotions.
  - After you manually add an exclusive promotion, if it does not offer the greatest discount to the customer it will be automatically removed from the applied promotions list.
  - After you manually add an exclusive promotion, if it offers the greatest discount, it will be applied and all other promotions will be removed.
- When the Automatically Apply Promotions box is cleared:
  - After you manually add an exclusive promotion, when no other promotion is applied, the exclusive promotion is applied without conflict.

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☐ After you manually add an exclusive promotion, when there are one or more promotions already applied, NetSuite shows the total discount to be applied in each scenario. You must manually consider which combination provides the best discount available for the customer and click **Replace** to apply the exclusive promotion, or click **Cancel** to discard it.

> **Note:** When Item Line Exclusive promotions are applied and there are one or more promotions that can also be applied, NetSuite warns you that you cannot combine the promotions. It does not, however, display the total discount that can be applied in each scenario.

When you check the Automatically Apply Promotions box again, NetSuite automatically applies the combination of promotions that provide the greatest discount possible to the customer. This combination can also include promotions that are not available to be automatically applied but have been added manually. Manually added promotions remain applied until you click Clear All Lines to reset the list of applied promotions to the default selection.

The following scenarios illustrate how promotions are applied. In this example, the promotions are applied to a transaction with an order total of $300 before promotions are applied. The value of the order does not change. The value of each promotion is the amount of US dollars that will be discounted from the order total.

When the Auto-Apply Box is Checked

Scenario 1: Default behavior, promotions are automatically applied.

Result: The exclusive promotion (Promotion 2) is excluded.

Total Discount: 150.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	Yes
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	No	100	Yes
Promotion 4	No	No	40	No
Promotion 5	No	No	200	No

Scenario 2: Promotion 3 is now exclusive. Default behavior, promotions are automatically applied, but now the promotion with the best discount is exclusive.

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

Total Discount: 100.

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Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	**No**
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	**Yes**	100	Yes
Promotion 4	No	No	40	No
Promotion 5	No	No	200	No

Scenario 3: Promotion 4 is manually applied.

Result: Promotion 4 does not create the greatest discount when combined with other promotions so it is automatically removed. The promotion that offers the best discount is applied (promotion 3).

Total Discount: 100.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	No
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	Yes	100	Yes
Promotion 4	No	No	40	No
Promotion 5	No	No	200	No

Scenario 4: Promotion 5 is manually applied.

Result: Promotion 5 offers the greatest discount when combined with other promotions so it is applied with the other promotion that can be combined and automatically applied (Promotion 1), the exclusive promotion (Promotion 3) is removed.

Total Discount: 250.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	**Yes**
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	Yes	100	**No**
Promotion 4	No	No	40	No
Promotion 5	No	No	200	**Yes**

Scenario 5: Promotion 5 is manually applied, but is now exclusive.

Result: Promotion 5 offers the greatest discount compared with other possible combinations so it is applied. All other promotions are removed.

Total Discount: 200.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	**No**
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	Yes	100	No
Promotion 4	No	No	50	No
Promotion 5	No	**Yes**	200	Yes

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When the Auto-Apply Box is Cleared

Scenario 1: Default behavior, promotions that are automatically applied before the box is cleared remain.

Result: The exclusive promotion (Promotion 2) is excluded.

Total Discount: 150.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	Yes
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	No	100	Yes
Promotion 4	No	No	40	No
Promotion 5	No	Yes	200	No

Scenario 2: Promotion 2 is manually applied.

Result: NetSuite displays a message that shows the total discount to be added to the transaction depending on which promotion is applied. Click **Cancel** to keep the currently applied promotions that offer a greater discount than Promotion 2.

Total Discount: 150.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	Yes
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	No	100	Yes
Promotion 4	No	No	40	No
Promotion 5	No	Yes	200	No

Scenario 3: Promotion 5 is manually applied.

Result: NetSuite displays a message that shows the total discount to be added to the transaction depending on which promotion is applied. Click **Replace** to apply Promotion 5 that offers a greater discount than the currently applied promotions.

Total Discount: 200.

Promotion	Automatically Applied?	Exclusive?	Value of Promotion	Applied?
Promotion 1	Yes	No	50	**No**
Promotion 2	Yes	Yes	10	No
Promotion 3	Yes	No	100	**No**
Promotion 4	No	No	40	No
Promotion 5	No	Yes	200	**Yes**

Viewing the Status of Applied Promotions

The Audit and Visibility SuitePromotions feature provides a clear overall view of the application of promotions on a transaction. Audit and Visibility shows if a promotion was added by the user or by

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best offer. If a promotion is not applied, it also displays the reasons why it was not applied. Such information is invaluable if you need to track customer issues, especially considering the increasing complexity of how promotions are applied to transactions.

Status information regarding promotions that are applied to a transaction, as well as those that are not applied, is displayed on the Promotions subtab on sales orders, cash sale transactions, invoices and return authorizations.

Promotions that are not applied to a transaction only appear on the Promotions subtab if they are manually added or were previously automatically applied before a change to the eligibility criteria. For example, an item being removed from a transaction that had previously qualified the transaction for a promotion's discount.

To illustrate, an item promotion that offers $5 discount on dresses when at least one T-shirt is bought, may be manually or automatically applied if a T-shirt and a dress are added to the transaction. This promotion will still show on the Promotions subtab if the T-shirt or dress are removed from the transaction, however it will not be applied. In the Status Information window, the reason for not applying this promotion will be listed as Criteria Not Met.

To view the status of a promotion on a transaction:

1. Click the **Promotions** subtab and click in the **Status Information** column for the promotion whose status you want to view.
2. Click the **Click for details** link that appears in the **Status Information** column.
3. The Status Information window opens.

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

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

Calculating Shipping Costs Before Automatically Applying Promotions

When a transaction is eligible for a shipping promotion, at least one combinable promotion, and one exclusive promotion, the shipping costs will impact which promotions offer the largest discount. Therefore, only in such circumstances and when the shipping costs are unknown, you must first calculate shipping costs before you can automatically apply promotions.

When this happens a warning message appears on the Promotions subtab.

Click the **calculate** link to calculate shipping costs for the transaction before the promotions can be automatically applied. This is the only way to ensure the best offer will be calculated on the transaction.

After the shipping costs have been calculated the warning message disappears and the promotion combination that offers the greatest discount to the customer is applied to the transaction.

How Promotion Discounts Are Applied to Transactions

By default, promotion discounts are applied to the transaction total after sales tax has been calculated. However, in the U.S. you have the option to apply the discount to all items in a transaction before sales tax is calculated. For more information, see the help topic Applying a Discount Before Sales Tax

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Applying Automatically Added Free Gift Items

The item provided by a free gift promotion is automatically added to a transaction if the transaction matches the promotion's eligibility criteria.

When you apply a free gift promotion on the Promotions subtab, the following columns provide information regarding the free gift promotion:

- **Eligible Free Gifts** – displays the number of free gifts eligible to be applied to this transaction with this promotion

- **Free Gifts Added** – displays the number of free gifts currently added to this transaction with this promotion

After the free gift promotion is applied to a transaction, either manually or automatically, the free item is added to the customer's order when the eligibility criteria is met. For example, if the customer must spend $100 to receive the free gift, the free gift item will automatically be added after items to the value of $100 or more are added to the transaction. The free gift appears on the Items subtab with the 100% discount showing on the line below in the Items list.

The Free Gift Promotion column in the Items list identifies the free gift promotion that is responsible for adding the free item to the order.

A free gift cannot be added to an order automatically if mandatory information regarding the free gift is missing. For example, a free gift promotion offers a warranty that requires a value to be entered in the Amount column in the Items list. In such cases a popup window displays the information that is required before the free gift can be added to the order. The free gift appears on the Items subtab but is not added to the order until the missing information is entered. On the Promotions subtab, the Eligible Free Gifts column will indicate that there are free gifts eligible to be applied to the transaction, but the Free Gifts Added column will display zero.

> **ⓘ Note:** If the free gift item is already added to the order, this item does not become the free gift. An additional instance of the item is added.

To reject the free gift item, select it in the Items list and click the **Remove** button. The free gift item is discarded from the transaction.

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SuitePromotions Best Practices

To take full advantage of SuitePromotions, you should follow the best practices outlined here:

- Migrating to SuitePromotions
- Transactions that Cannot have Stackable Promotions
- Free Gift Promotion Item Considerations
- Shipping Promotions and Multiple Shipping Routes
- Saved Search Performance
- Auto-Apply Promotions Limits
- Changing Customer Details After Applying Promotions
- Planning Automatically Applied Promotions

Migrating to SuitePromotions

SuitePromotions can be enabled at any time to enable you to take advantage of the new features they offer. For more information, see the help topic Configuring Promotions.

▶ View the SuitePromotions Migration video — part one

▶ View the SuitePromotions Migration video — part two

You can continue to use standard and Advanced promotions after SuitePromotions have been enabled, but you cannot benefit from the new SuitePromotions features such as Stackable Promotions, Auto-Apply Promotions, or Best Offer when you apply them to a transaction. You will be able to apply only one standard or Advanced promotion to a transaction, for example.

By default, the first promotion you apply to a transaction determines if the SuitePromotions feature can be used. If you apply a standard or Advanced promotion to a transaction, SuitePromotion features are disabled for that transaction only.

If you need to create tiered promotions, you can create an Advanced Promotion with tiers and apply this promotion to a transaction, even when SuitePromotions are enabled. Tiered promotions will be made available to SuitePromotions in a future release.

If you use the Auto-Apply feature, by default it will be enabled. To manually add standard, Advanced, or SuitePromotions that cannot be automatically applied, you must first clear the **Automatically Apply Promotions** box on the transaction. For more information, see the help topic Automatically Applying Promotions to a Transaction.

When you add a standard or Advanced promotion, the Best Offer feature is also disabled and you must manually determine if the promotion provides the best offer for the customer. For more information, see the help topic Best Offer.

You can continue to use standard and Advanced promotions until you no longer need them or have replaced them with SuitePromotions.

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Enabled Features

☑ PROMOTION CODES
☐ SUITEPROMOTIONS
☐ AUTO-APPLY PROMOTIONS

Enabled Features

☑ PROMOTION CODES
☑ SUITEPROMOTIONS
☑ AUTO-APPLY PROMOTIONS

Available Promotion Types

Standard Promotions

Advanced Promotions
- Item-Based
- Buy X, Get Y
- Order-Based

Available Promotion Types

Standard Promotions

Advanced Promotions
- Item-Based
- Buy X, Get Y
- Order-Based

+ SuitePromotions
- Item
- Fixed Price
- Order
- Shipping
- Free Gift

Promotion Applied to Transaction

Available Functionality

☑ TIERED PROMOTIONS

Available Functionality

☐ STACKABLE PROMOTIONS*
☐ AUTO-APPLY PROMOTIONS*
☐ BEST OFFER*
☑ TIERED PROMOTIONS

Available Functionality

☑ STACKABLE PROMOTIONS
☑ AUTO-APPLY PROMOTIONS
☑ BEST OFFER
☐ TIERED PROMOTIONS

* This feature is disabled when a standard or advanced promotion is applied to a transaction.

Transactions that Cannot have Stackable Promotions

Currently, transactions cannot have multiple stacked promotions in the following cases:

- The transaction was created when the SuitePromotions feature was disabled.
- The transaction is a sales order with billing schedules. For more information regarding billing schedules, see the help topic Billing Schedules.

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Free Gift Promotion Item Considerations

Free gift promotions currently support all items with the exception of parent matrix items. For example, if you have a parent matrix item called Basic T-shirt that has child items for different sizes, the Basic T-shirt cannot be selected as a free gift item. You can however, define one of the child items, such as Basic T-shirt: Medium as the free gift item for your promotion.

Free gift promotions are limited to only one free gift item per promotion.

You cannot replace the free gift item added to a transaction by a free gift promotion with a different item. You cannot change the quantity of the free gift item added to a transaction by a free gift promotion. You can reject the free gift by clicking the Remove button to discard it from the transaction.

Shipping Promotions and Multiple Shipping Routes

You can use multiple shipping routes only with SuitePromotions that have shipping impact.

Multiple shipping routes are supported when:

- The Multiple Shipping Routes feature is enabled
- The Enable Item Line Shipping box is checked on the Items subtab of the transaction
- The SuitePromotions feature is enabled

If the above criteria are met, when an eligible shipping SuitePromotion is added, the shipping discount is applied after you calculate the shipping costs.

Shipping SuitePromotions can only be automatically applied after shipping costs have been calculated.

> **ⓘ Note:** If the SuitePromotions feature is disabled, NetSuite displays a message confirming that promotions with shipping impact are not allowed when the transaction has Multiple Shipping Routes activated. The promotion is removed from the transaction.

For more information regarding Multiple Shipping Routes, see the help topic Multiple Shipping Routes.

Saved Search Performance

When you use an item saved search to define item eligibility on SuitePromotions, the Saved Search Preferences subtab appears on the promotion record. Here you can configure the way that the promotion handles saved searches. The options provide you with a choice between better performance or more accurate results.

Saved searches are cached periodically to update the items included. This also ensures the data is retrieved quickly every time a promotion that uses saved searches is evaluated on a transaction. If however, you have a saved search that is linked to an inventory that frequently changes, it is possible that recent updates to this inventory are not taken into consideration when a promotion is evaluated. In such cases, it may be worth considering not relying on the cached version of the saved search.

You can select one of the following saved search options for each promotion:

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

The frequency that saved searches are cached is illustrated in the following diagram.
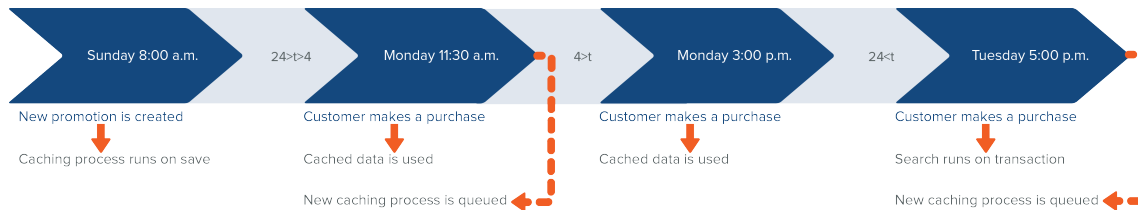
When a new promotion is created, the caching process automatically runs after the promotion is saved. Then, for example, if a customer makes a purchase less than 24 hours but more than four hours after caching the saved search, the cached data is used and a new caching process is queued. If a customer makes a purchase more than 24 hours after the last cache, the cached data is not used, a new search on the transaction is initialized, and a new caching process is queued.

Auto-Apply Promotions Limits

The number of active promotions that can have the This promotion can be automatically applied box checked is limited to 30 for a specific date range per location. This limitation is enforced when you create or edit a promotion record. You cannot save a promotion if it exceeds this limit.

To save new promotions without exceeding the limit, you must do one of the following:

- Clear the **This promotion can be automatically applied** box for the new promotion.
- Check the **Inactive** box.
- Change the date range. Any promotions that do not specify a date range are considered as "any date" and are counted as one of the 30 available active promotions for all date ranges.
- Change the location. Any promotions that do not specify a location are considered as "any location" and are counted as one of the 30 available active promotions for all locations. For more information on setting locations, see the help topic Setting Where Promotions Can Be Used.
- Clear the **This promotion can be automatically applied** box on another promotion with the same date range or location, or on a promotion with an unspecified date or location.

For more information about promotions that do not specify date ranges or locations, see the help topic Promotions With Unspecified Schedules or Locations. See also, Planning Automatically Applied Promotions.

> **ⓘ Note:** You can create an unlimited number of active promotions that do not have the This promotion can be automatically applied box checked, and you can apply these promotions manually.

Promotions With Unspecified Schedules or Locations

Promotions with blank date ranges and blank locations are considered as "any date and any location". These promotions are counted as one of the 30 active promotions available for automatic application. You cannot create more than 30 active "any date and any location" promotions.

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Coupon Codes and Auto-Apply

Promotions that have the **This promotion can be automatically applied** box checked are limited to Multiple Use coupon codes. Single-use coupon codes cannot be automatically applied.

Changing Customer Details After Applying Promotions

If the customer details change after promotions have been applied to a transaction, you should clear all lines on the Promotions subtab. Promotions that have been previously added and are no longer available to the new customer are not automatically removed. The discount these promotions offer is not applied to the transaction, but any single-use coupon codes associated with these promotions will be used.

Planning Automatically Applied Promotions

When planning what promotions you want to be available for automatically applying to a transaction, you need to consider the Auto-Apply Promotions limits. For more information, see the help topic Auto-Apply Promotions Limits.

To make additional promotions active, you may need to make some existing active promotions inactive. Consider the following scenario:

- Promotion locations:
  - Barcelona
  - New York
- Promotion date ranges:
  - October
  - November

The following tables illustrate some basic combinations of active promotions that can be created and can be available for automatically applying to transactions.

Combination 1

Combination 1 shows that the number of active promotions that can be automatically applied is 120, if you specify distinct date ranges for each location. You can have 30 active promotions for each date range, per location. This is the maximum number of automatically applied promotions that it is possible to create in this scenario.

Combination 1: total number of active promotions is 120			
	Unspecified Date Range	October	November
Unspecified Location	0	0	0
Barcelona	0	30	30
New York	0	30	30

Combination 2

Combination 2 shows that by specifying a location in each promotion without specifying a date range, the number of active promotions that can be automatically applied is decreased. You can have 30 active promotions per location.

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Combination 2: total number of active promotions is 60			
	Unspecified Date Range	October	November
Unspecified Location	0	0	0
Barcelona	30	0	0
New York	30	0	0

Combination 3

Combination 3 shows that when no date ranges or locations are specified on any active promotion, the maximum number of active promotions that can be automatically applied is limited to 30.

Combination 3: total number of active promotions is 30			
	Unspecified Date Range	October	November
Unspecified Location	30	0	0
Barcelona	0	0	0
New York	0	0	0

Combination 4

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

Combination 4			
	Unspecified Date Range	October	November
Unspecified Location	0	5	0
Barcelona	10	15	20

In this example, the following active promotions are available in Barcelona during October:

- the 5 promotions for October with no specified location count as 5 of the promotions for Barcelona during October

- there are also 10 promotions for Barcelona with no specified date range

- the maximum number of active promotions that can be automatically applied specifically to Barcelona during October is 15

  5 October with no specified location + 5 Barcelona with no specified date + 15 Barcelona in October = 30 active promotions.

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