*i*TPM

2018.1.3 Update

Release Notes
July 24, 2018

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iTPM Extend NetSuite for Trade Promotion Management

ANALYSIS · BUDGETING · DEAL PLANNING · SETTLEMENTS

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Safe Harbor Statement:

Statements contained on this web page and with words **"product road map" are forward-looking statements.** Words such as "believe," "estimate," "intend," "will," "expect," "project," and similar expressions, as they relate to our future plans, are intended to identify such forward-looking statements. **All forward-looking statements are subject to various risks** and uncertainties that could cause actual results to differ materially from expectations. We reserve the right to adjust future plans as appropriate, based on client needs and market forces.

Top 7 New Features 2018.1.3

1. [S-01714] A new way to enter allowances, estimated quantity and retail info on one form.
2. [S-01181] Create a calendar view of *i*TPM promotions.
3. [S-01788] Show more detail on the list when selecting a promotion for a settlement
4. [S-01760] From the promotion, multi-select and resolve deductions associated with the promotion.
5. [S-01683] Option to Auto-close approved promotions after "x" days
6. [S-01754] CSV Expense to automate the process of expensing deductions.
7. [S-01755] CSV Settlement to automate the process of resolving deductions to approved promotions.

1. A new way to enter allowances, estimated quantity & retail info on one form.

Benefits:
- All data entry on one form saves mouse clicks
- Enter AND edit allowances, etc. by NetSuite item group or items

Click into each row, column to enter data, similar to Excel

2. Promotion Calendar View.

Benefits:
- Easier way to review your promotions and allowances

Customer	Item Description	Promotion Type	Promotion Description	ID	Start Ship	End Ship	UOM	MOP	%	Rate Per Unit	January				February				March				April				M	
											7	14	21	28	7	14	21	28	7	14	21	28	7	14	21	28	7	14
Kroger	12oz	EDLP	2018 EDLP	3	1/1/2018	12/31/2018	Case	OI	10%	$1.50																		
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3. Show more detail on the list when selecting a promotion for a settlement

Benefit: Save time finding the correct promotions for promotional settlements

Promotions are now in a list instead of a drop-down menu.

Promotions List

Cancel

APPLY TO	PROMOTION TITLE	OTHER REF CODE	PROMOTION TYPE	CONDITION	SHIP START DATE	SHIP END DATE	NET LIABILITY	OVERPAY	EST.SPEND	LE SPEND	MAX LIABILITY	EXPECTED LIABILITY	ACTUAL SPEND
2	Test Promotion - 05/29			Ad and EDLP (BB OI)	2/28/2018	2/28/2018	0.00	211.56	5,845.00	223.56	12.00	12.00	223.56
4	Test Promotion-J 05/29			Ad and EDLP (BB OI)	5/12/2018	5/28/2018	0.00	1,481.90	600.20	1,629.90	148.00	148.00	1,629.90
6	Testing 90 days Older			Ad and EDLP (BB OI)	2/28/2018	2/28/2018	12.00	0.00	12.00	23.00	12.00	12.00	11.00

4. Multi-select more than one deduction for settlements

Feature: We now support deduction settlement workflow starting on the promotion, and allow users to settle more than one deduction at a time.
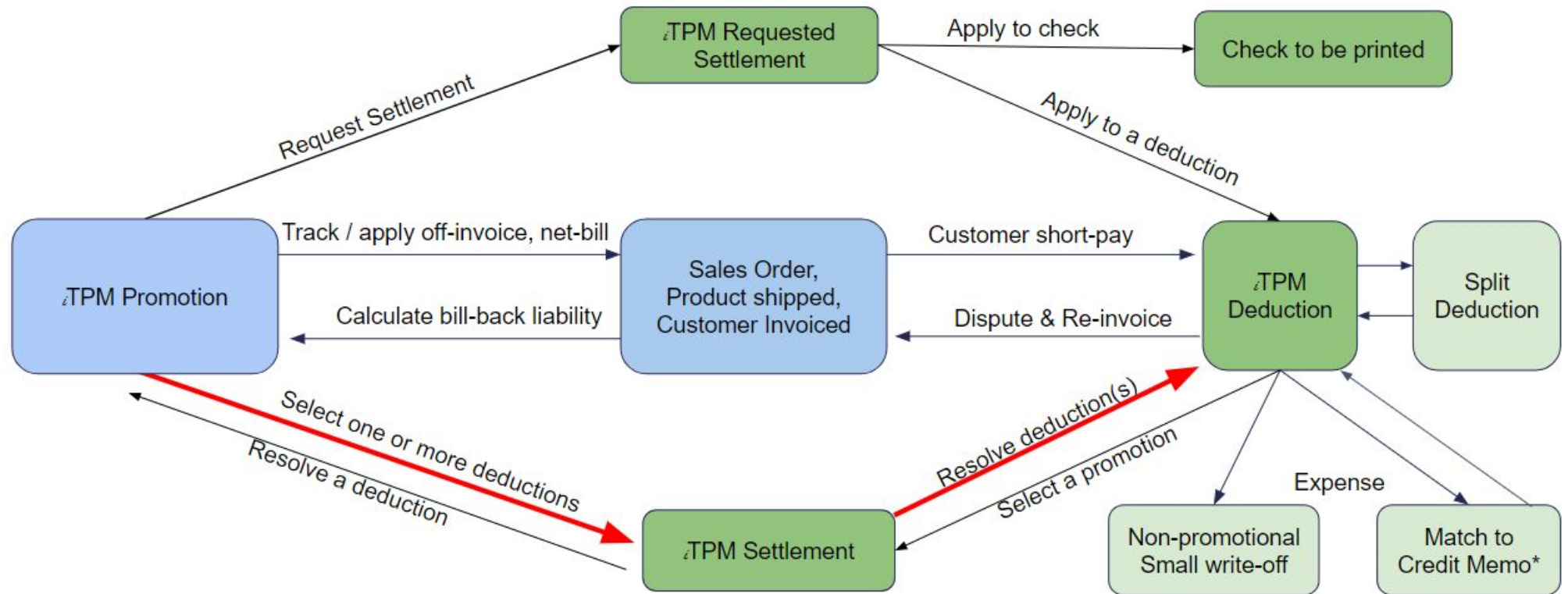
4. Multi-select more than one deduction for settlements

Benefit:

Save time and mouse clicks by selecting many deductions.

5. Option to auto-close Approved promotions after "X" days

Benefits:
One less TPM task to manually perform.

This insures promotions are always closed in a timely manner.

Set how auto-close by promotion type.

Leave the # of days blank or 0 to always close manually

6. CSV Expense to automate the process of expensing deduction.

Benefit: Save time and reduce data entry errors by using CSV files to quickly EXPENSE hundreds of open deductions with one CSV import.

7. CSV Settlement to automate resolving deductions to approved promotions

Benefit: Save time and reduce data entry errors by using CSV files to quickly create promotional SETTLEMENTS for hundreds of open deductions with one CSV import.
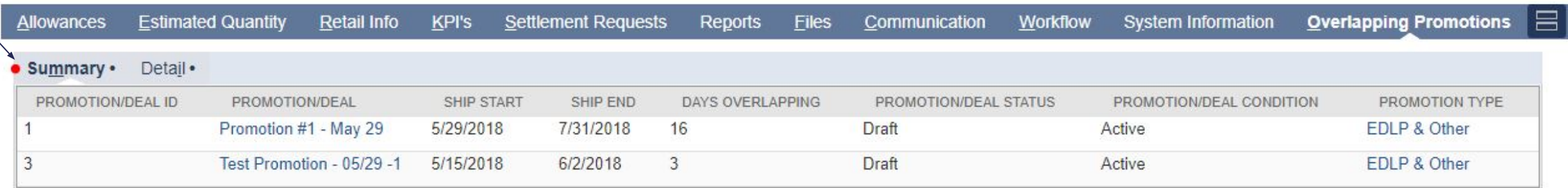
Other Features 2018.1.3

8. [S-01686] *Summary* sublist for *Overlapping Promotions* sublist
9. [S-01690] Real-time total of split records (See the total of your splits as you enter each row.)
10. [S-01786] Add new columns on the Settlements list view to support month-end reporting.
11. [S-01790] Add UOM to the Item Summary sublist on the promotion Sales and Shipment reports.
12. [S-01688] "Please wait" banner when creating an allowance from NetSuite Item Groups with 3 or more items
13. [S-01787] Add column to the JE list view to support month-end reporting.

8. *Summary* subtab on the *Overlapping Deals* sublist

Benefit: Easier to see how many promotions are overlapping

text

9. Real-time Balance of split records

Benefit: No need to use a calculator; always know the sum of your splits as you enter them.

Prevents losing the data you entered because the total doesn't match the open balance.

10. Add new columns on the Settlements list view

Benefit: Easier to research settlement and deduction questions, especially when you export to Excel

2018.1.3 Update

11. Add UOM to the Sales and Shipment reports

Benefit: Prevents confusion when reading the shipment report
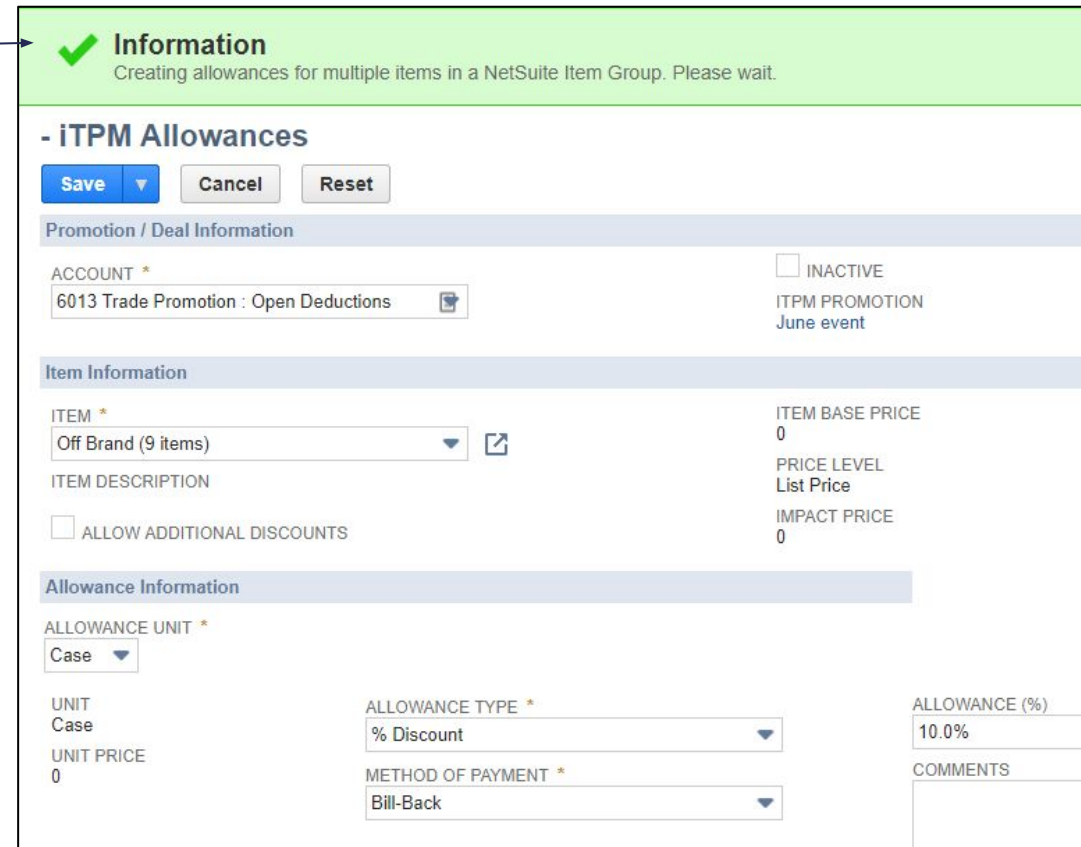
12. '*Please wait*' banner after selecting NetSuite Item Group for allowances

Benefit: User gets confirmation that *i*TPM is working, creating allowances for multiple items in a group.

Before this banner,

- The user wasn't aware that they selected a NetSuite Item Group.

- User didn't know if iTPM was working of if the web page was 'frozen'.

13. Add column to the JE list view to support month-end reporting

Benefit:
Save time when reviewing and researching iTPM related journal entries for month-end close.

Update Schedule

The next update is tentatively scheduled for **Fall 2018.**

¿TPM Anticipated Releases	Anticipated Date Generally Available*
2018.2.1	November 2018. Release date and enhancements may change based on client needs and requests.

* Subject to change

Enhancement Ideas

The following are enhancement candidates that are being considered for future ¿TPM updates:

- [S-01792] Event-based accruals.
- [S-01816] Apply a vendor bill to a promotion.
- [D-01169] Classifications should roll forward. (Credit memo to deduction, deduction to settlement, etc.)
- [S-01870] Settlements should not hit the A/P account. Redesign to eliminate the two-step JE.
- [S-01812] Ability to select an indirect account on the promotion plan, and filter the promotion list by indirect account.
- [S-01877] If the customer has a price level, default the promotion price level to the customer's price level.
- [S-01873] Promotion Incremental analysis & ROI report / view
- [S-01869] Calendar report to have option to show item groups, not just item detail
- [R-01261] Consolidate journal entries when using CSV Bulk Expense

Refer to the *Admin Release Notes* for known issues that are also candidates for the next release.

Summary

- Email questions and issues to support@cgsquared.com

- Updated User Guides are available at www.i-TPM.com/training-resources

- Technical release notes available at www.i-TPM.com/admin-training-resources