


Quick Reference: iTPM PROMOTIONS

HELP! Email questions & issues to support@cgsquared.com

 **FIRST TIME NETSUITE USER?** Read **NetSuite Basics User Guide** at www.i-TPM.com/training-resources.com.

<u>Promotion CONDITION</u> based on dates	<u>Promotion Workflow:</u> YOU control Deal STATUS	<u>Method of Payment (MOP)</u>
Future: Promotion hasn't started. Active: Promotion is running. Completed: Promotion is over. You don't control this. Condition is calculated using ship dates.	Draft: Submit <i>Drafts</i> for approval. Pending Approval: Deal waiting for approval. Approved: Official promotion. Rejected: Deal wasn't approved. Voided: Stop this promotion. Closed: No more settlements expected.	Billback: Allowances paid sometime AFTER the transaction. Off-invoice: Allowances applied AND visible on the order. Net-bill: Allowances applied but NOT visible on the order.

Steps to create and submit a NEW promotion for approval: [COPY PROMOTIONS to save time.](#) (ACTIONS-> MAKE COPY)

1. [New Promotion](#): Click on *iTPM -> Promotions -> List -> New*
2. [Who gets this promotion?](#) Under **Promotion Information**, select **Customer & More**:
A: Correct **Subsidiary?** **B:** Select **promotion type:** **C:** **What customer?** Enter the first few letters of customer name
D: Select **price level** **E:** Enter a **title / reference code**
3. [When is this promotion?](#) Under **Promotion Dates** Enter **Start and end ship dates**. Optional: Order & Performance dates
4. [Any Lump Sum?](#) (Optional) Under **Allowances** **A:** Enter the **fixed cost** and **B:** change the **default account (optional)**.
5. [Allowances, how much will you sell?](#) **Planning**
A: Select **item or item group** and enter the following information:
B: Allowance **Unit-of-Measure** **G:** **Default chart-of-account** **K:** **Everyday price**
C: **Method of Payment** **H:** **Base Quantity** **L:** **Estimated Merch price**
D: **% discount, --OR--** **I:** **Incremental Quantity** **M:** **Estimated % ACV with Display**
E: Allowance **Rate** per unit **J:** **% Redemption** **N:** **Merchandising Activity**
F: **Additional discounts?** (Multiple allowances for the same item in this promotion?)
 to add an item or item group. when done. to make changes directly in any row and cell
6. Click when you are done adding and/or editing all your items and/or item groups to your promotion.
PROCESS PLAN will validate your data, and expand your item groups to items. **Process Plan can take up to 15 minutes.**
7. Review [Is my estimated quantity reasonable?](#) Under **Planning** *Last 52 wk items*, **Reports**, look at *Last 52 weeks*.
[Any duplicates?](#) Under **Overlapping Promotions**, confirm all overlapping allowances and promotions are correct.
[Add Notes, Attachments & More](#) Use the **Communication** subtab to add comments and attach electronic documents.
8. **SUBMIT** for approval? If not, edit, back to #5, and PROCESS PLAN again. If the promotion is ready, click on the button.

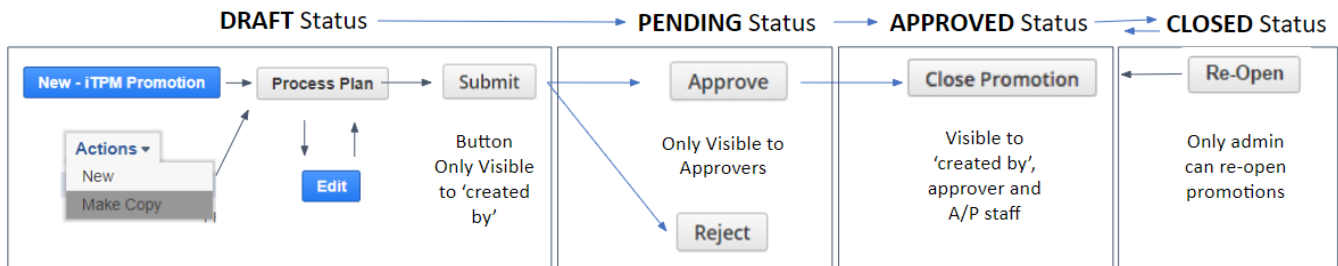
[Find Promotions in a List](#), *iTPM -> Promotions -> List* Then click **VIEW** or the promotion ID to open the promotion
 When **VIEWING** a promotion, workflow includes: **EDIT SUBMIT APPROVE / REJECT VOID CLOSE REOPEN Actions-> COPY**
[Calendar View report](#): *iTPM -> Promotions -> Calendar*

Analyse & Compare Promotions: Go to *-iTPM -> Promotions -> Comparison Summary* or *-iTPM -> Promotions -> Comparison Detail*

Promotion Spending KPIs	Estimated	Latest Estimate	Expected Liability	Net Liability	Actual
	What you THINK will happen.	What is most likely to happen.	Expected cost as of today , including paid and unpaid amounts.	What you owe but haven't paid.	What has happened that's been paid or resolved as of today .

1.0 Get Started

Below is an overview of iTPM promotion workflow:



DRAFT Status:

- 1a. Create a new promotion using *iTPM -> Promotions -> List -> New*
- 2a. Type in the details of your promotion on one page, then **SAVE**
----- or -----
- 1b. Create a new promotion using *Actions / Make Copy*
- 2b. Wait for your promotion to be copied (up to 15 minutes)
- 3. **EDIT** your promotion if necessary
- 4. **PROCESS PLAN** to validate and expand your plan to allowances, estimated quantity and retail info subtabs. (This can take up to 15 minutes.)
- 5. Review your promotion KPIs. Review the estimated cost of your promotion.
- 6. **SUBMIT** your promotion for approval

PENDING Status

- 7. Someone will **APPROVE** or **REJECT** your promotion.


APPROVED status

- 9. When promotions become active or completed, promotions are available to **RESOLVE DEDUCTIONS**.
Use the promotion KPIs to review deductions and claims matched to each promotion:
 - Compare your estimated promotion cost to the Latest Estimate for the promotion.
 - Review Net Liability; This is what iTPM thinks you owe, but haven't paid yet. (Net Liability = Expected Liability minus Actual Spend.)

CLOSED status

- 10. **CLOSE PROMOTION** when you think all settlements and claims have been processed. This will 'release' any unpaid Net Liability for this promotion.
- 11. Optional: **REOPEN** promotion if you get a claim or deduction after you closed the promotion.

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



Note: This user manual is written with the assumption that iTPM users are already familiar with NetSuite and have received basic NetSuite training on navigation and features. If you are new to NetSuite, first read the **NetSuite Basics User Guide**, located at www.i-TPM.com/training-resources