Integrated Trade Promotion Management

BUILT FOR ORACLE + NETSUITE
NATIVE SUITEAPP

Built-for-NetSuite

iTPM Admin Release & Install Notes

Version 2018.2.1b *Minor* Update

Released January **25**, 2019

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Helpful Hint: When viewing this as a PDF, click on the topic to go directly to that section. To get back to the Table of Contents, click on *Release Notes* at the top of the page or *Link to Table of Contents* at the bottom of the page.

Quick Reference: UPDATE *i*TPM 2018.2.1a to 2018.2.1b

Use the Administrator User Guide and follow first-time tasks when installing *i*TPM.
This check list is for UPDATING *i*TPM in your sandbox and/or production account.

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

Test in your sandbox before installing in production. We recommend you test this new version in your sandbox before installing in production to prevent issues, and to practice performing the administrative tasks in section 3.6 iTPM Administrator tasks (After first-time install or Update).
We test *i*TPM using the Chrome browser.

You are required to update to 2018.2.1b on or before February 8, 2019. Any accounts not updated by this date will be notified when their account will be updated. *i*TPM must be updated before first wave clients are updated to NetSuite 2019.1, which will start February 15th.

Milestone	UPDATE *i*TPM: Tasks for the *i*TPM Administrator	Status / Comments
1. *i*TPM 2018.2.1b is available.	If time allows, **read these technical release notes and the *What's New In 2018.2.1b***	
2. Update your sandbox	To **update your sandbox**, follow instructions in section 3.4 UPDATE iTPM in you Sandbox (or Release Preview account) to update your sandbox to *i*TPM 2018.2.1**b**. If you don't have a sandbox, skip to set 5.	
3. Perform admin tasks in your sandbox	**Perform admin tasks** as described in 3.6 *i*TPM Administrator tasks (After first-time install or Update)	
4. Test!	**Test *i*TPM.** Suggested areas to include are in section 3.7 Suggested Sandbox Testing	
5. Authorize update to your production	**Email CG Squared** to update *i*TPM in production, described in 3.5 UPDATE *i*TPM in production	
6. Perform admin tasks in production	**Perform admin tasks** as described in 3.6 *i*TPM Administrator tasks (After first-time install or Update)	
7. Monitor	Monitor *i*TPM to confirm it's working as expected.	

1.0 Overview

1.1 Enhancements in 2018.2.1b (End User Perspective)

All user guides have been updated with information on these enhancements to *i*TPM:

Top *i*TPM 'Minor' Enhancements:

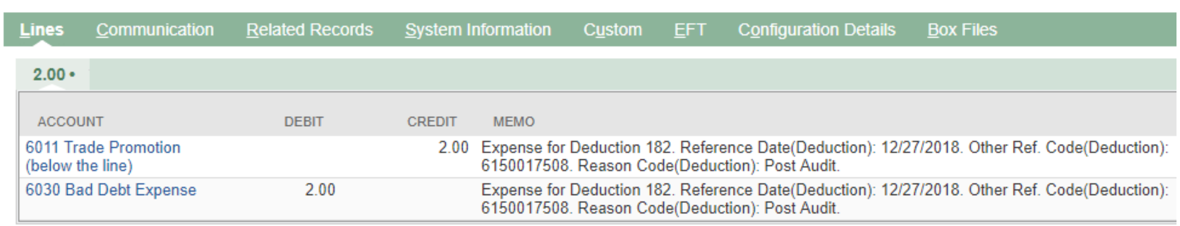
- S-01934, S-02034 Reconciliation: Create saved searches and documentation to help clients reconcile *i*TPM data monthly. As part of this story, the following is now available:
  - Template saved searches, available in the global search using "*iTPM recon*"
  - *iTPM -> Reconciliation* is new for roles using the accounting center.
  - A first draft of the *Monthly Reconciliation User Guide* is available on-line with the other deduction management user guides.

- S-01968 Add REASON CODE and Performance date to Split and CSV SPLIT template.

- S-02035 Reduce mouse clicks for clients that use REASON CODE. Clients now have the option to associate one GL-account with each reason code. When using the EXPENSE button on a deduction, *i*TPM uses the reason code to pre-populate the debit GL-account in the journal entry.

> **Possible Data Loss:** Reason code was only introduced a few weeks ago, and is not yet being used in production accounts by clients. Because of this, previous deduction values may not be brought forward when updating from 2018.2.1a to 2018.2.1b.

- S-01974 Save mouse clicks by auto populating the lines on EXPENSE journal entries using information from the deduction and journal entry; date, memo, etc.



Lines | Communication | Related Records | System Information | Custom | EFT | Configuration Details | Box Files

2.00 •

ACCOUNT	DEBIT	CREDIT	MEMO
6011 Trade Promotion (below the line)		2.00	Expense for Deduction 182. Reference Date(Deduction): 12/27/2018. Other Ref. Code(Deduction): 6150017508. Reason Code(Deduction): Post Audit.
6030 Bad Debt Expense	2.00		Expense for Deduction 182. Reference Date(Deduction): 12/27/2018. Other Ref. Code(Deduction): 6150017508. Reason Code(Deduction): Post Audit.

- S-01977 Save mouse clicks when creating a deduction from a credit memo; bring forward the credit memo values into the deduction:
  - *i*TPM copies the Credit Memo *memo* into the Deduction *memo*
  - *i*TPM copies the Credit Memo *date* into the Deduction *date*
  - *i*TPM copies the Credit Memo *PO* into the Deduction *Other Ref. Code*

- S-2010 Add three more selectable attributes for deductions. Use these new fields to manage deductions, and to support reporting.

- Research Status: i.e., In Progress, Approved, Not-Approved, Other
- Next Steps: i.e., Split this, Contact customer, Get approval, Other, None
- Group: i.e. Foodservice, Retail, Other
- Go to *iTPM -> Setup* to create values for your company

Other enhancements and minor changes:

- S-02028 The error message "*iTPM Amount and Open Balance should be equal*" was confusing. The text has been changed to "*Deduction has been resolved and can't be edited.*"
- S-02020 Add a column to the *iTPM -> Resolutions -> Settlements* list, and the Settlements subtab on the promotion. The new column shows which settlements were created from deductions, and which ones are the new Adjust Spend settlements that only impact promotion KPIs. This is helpful for monthly reconciliation of *i*TPM data.
- S-01973 When using the RESOLVE DEDUCTIONS button on a promotion, we added customer to the promotion list. This is helpful if you have promotions at both the corporate parent (i.e. Kroger Corp) and for the customer's divisions (i.e., Peyton, King Super, etc.)
- S-01976 Add columns to *iTPM -> Promotions -> List*, including memo and other reference code.
- S-02016 Make the Accrual subtab the first subtab on the Promotion Type form.
- S-02014 Add item description to the 52 weeks saved searches under the planning subtab, and show both the total and 52 week average. Currently only the item number is shown and the total.
- S-02031 On the ALL settlement list view, identify settlements that void other settlements. Add additional list views that show Only Voiding Settlements, and Only Adjust Spend Settlements, and a list view that does NOT show voided/voiding settlements and spend adjustments. These list views are helpful for data reconciliation.
- S-01952 Add MEMO field to the CSV Bulk Expense template
- S-01969 On Quick Split, the reason code and performance date should be copied forward as defaults.
- S-02003 Not all the fields were copied forward to both deductions from the original when using Quick Split.
- S-01975 Prevent promotions from being copied if the promotion is "*Pending Copy"* status.
- S-01970: Splits should retain the date of the parent deduction unless the user changes the date
- S-01992 Move the CREDIT MEMO list to the *i*TPM DEDUCTIONS memu. (This is because we no longer allow match-to-deduction, so all credit memos in the list were used to create deductions, not resolve them.
- S-01990 When using bulk journal entry approvals, deductions can get stuck in pending status. *i*TPM should move every deduction to resolved status when it's associated journal entry is bulk-approved.
- S-02001 CSV Bulk Expense should populate the line-level memos of the JE the same way as the EXPENSE button.
- S-02000 Add checkbox to accrual configuration: Adjust accrual for overspends
- S-01999 Add JE status to the *iTPM -> Resolutions -> JE* saved search list
- S-02009 Change to S-01977 Populate Deduction Other Reference # with Credit Memo PO field

- S-02008 Add item to the filter in the *iTPM -> Promotion Comparison Detail* list view
- S-02032 On the accrual set-up form, don't make Statistical Account a required field. This change allows clients to use the Accrual Log without needing to enable NetSuite Advanced Financials.
- S-02030 Simplify the on-line documentation, *iTPM Help-> User Guides*, with one web page per role: Planning, Deduction Management, and Admin. Currently the Planning and Deduction management training resources are on one web page.
- S-02011 To prevent deductions from getting stuck in processing status, check deduction status before split in case someone has changed the deduction after the CSV split file was imported.
- S-02002 Apply % off-invoice allowances on a sales order as a percent, not as a rate per unit.
- S-02024 Add item description to the 52 week saved searches under the planning subtab, and show both the 52 week average and the total number of units sold.
- S-02013 Create an *i*TPM Executive center tab for clients that use that center.
- S-02039 *i*TPM Support and *i*TPM Admin roles are missing new setup menu elements
- S-02034 Three more reconciliation saved searches
- S-02040 When viewing a deduction, add a new subtab to show ALL applied transactions to the parent deduction and all related splits.
- S-02036 Do additional validations on CSV Splits to prevent deductions from getting stuck in processing status under certain circumstances.
- S-02046 Open up the period field on settlements for editing to allow backdating.
- S-02044 To prevent any confusion, change one *i*TPM clean-up delete script concurrency from 2 to 1 to be consistent with all the other scripts that absolutely must always be a concurrency of 1. ALL *i*TPM scripts are now a concurrency of 1.
- S-02048 change the Adjust Spend feature to be available to all users that can create settlements, not just the *i*TPM admin role.

Additional changes in this version of *i*TPM:

- 1.2 What's Fixed or Improved
- 2.2 What's New (Technical Perspective)

1.2 What's Fixed or Improved

The following are *i*TPM defects and usability issues that have been addressed in this update:

- D-01236 One client was not able to create new allowances under the Allowances subtab because the UOM drop-down menu was blank.
- I-01096 On client reported that they were unable to create a deduction from an invoice. This was fixed in both 2018.2.1a and 2018.2.1b.
- D-01233 The saved search used for NetSuite reminders "Promotions active in the next 30 days" showed promotions beyond 30 days.
- S-02015 To prevent confusion, don't allow a promotion to be copied while promotion copy is in progress.
- D-01232 While *i*TPM would not allow users to create bad data, the deduction open amount was editable in a settlement. We made that field a read-only field.
- S-02017 To prevent the potential for creating 'bad' data, prevent users from checking or unchecking two fields on the promotion type form; order dates and performance dates. Changing these values for existing promotions created error messages when editing and coping promotions created with the old values. Users will follow best practices of creating a replacement promotion type and unchecking the "*Available?*" checkbox for the old promotion type.
- D-02019 Deleting a settlement didn't trigger a KPI refresh.
- S-02022 Validations on performances types were too strict. Validations were relaxed to only validate that the performance end date is after or equal to the performance start date.
- S-01971 To prevent confusion, do NOT show deductions on the list of deductions when using RESOLVE DEDUCTIONS that are already in the resolution queue. While this didn't create 'bad' data, it was confusing.
- S-01980 We removed some permissions from example *i*TPM roles that are not needed:
    - Change *Find Transaction* permission from EDIT to VIEW for role= *iTPM Promotion View Only* and *iTPM Promotion Planner*
    - Remove the *Override Period Restrictions* permission from the role= *iTPM Settlements & Deductions*
    - Remove *Check* permission from *i*TPM roles, including *iTPM Admin*, and *iTPM Settlements & Deductions*. *i*TPM no longer supports 'Apply-to-Check'.
- S-01998 Show journal entry reversals in the *Applied Transactions* sublist on deductions and settlements.
- S-01235 Prevent user from creating bad data: On JE save, confirm the JE amount is equal to the deduction amount. When working on *i*TPM data reconciliation, we confirmed that it is possible to change the amount of the journal entry such that it does not match the deduction open balance.
- S-01242 Editing a voided settlement changes the GL impact.
- D-01239 One client noted that the deduction amount is not correct when creating a deduction from an invoice that is associated with a payment against multiple invoices. We have not been able to replicate this issue in any other account, and not other client has reported this issue.
- D-01225 Prevent users from creating bad data: On the journal entry save, confirm the journal entry amount is equal to the deduction open amount.

- D-01250 CSV Bulk Expense could create bad data by create a journal entry for a deduction in a closed period where “Allow non-GL changes” is not checked
- D-01249 Voiding a Spend Adjustment settlement does not add the promotion to the KPI refresh queue.
- D-01246 Under some circumstances, the Close and Reopen buttons don’t add the promotion to KPI refresh queue.
- D-01255 Sometime process plan appears to skip an item. Why?
- D-01254 Net Liability KPI is not always correct for closed promotions on the Promotion Comparison report.
- D-01242 Editing a voiding settlement changes the GL impact
- D-01251 Journal entry amount is doubled in Resolutions -> Journal Entries. Not the rows, just the amount of the debit and credit. The data is correct, just doubled in the view
- D-01252 Known issue: Creating a settlement for $.01 that is allocated across more than 10 items will result in the settlement getting stuck. Short-term work-around: void the settlement and use the EXPENSE button on the deduction as an alternative to resolve the deduction.
- D-01256 Known issue: The new sublist “Related Applied Transactions” under the *i*TPM subtab on deductions shows a doubled amount for credit memos. The data is correct, the issue is only in the list view.

1.3 Upcoming changes

You are required to update to 2018.2.1b on or before February 8. Any accounts not updated by this date will be notified of when their account will be updated. This must be done before first wave of clients are updated NetSuite 2019.1, which will start February 15th.

Release Schedule:

The following is the anticipated schedule of future *i*TPM versions. * Release dates subject to change.

*i*TPM Anticipated Releases	Anticipated Date Generally Available*
2018.2.1x	Minor updates as needed. *i*TPM 2018.2.1x will be minor releases to fix critical bugs, and the addition of minor features requested by clients.
If needed	February 2019 A new release will be offered if changes are needed to work with NetSuite 2019.1 BFN certification that *i*TPM is compatible with the new version of NetSuite, 2019.1
2019.1.1a	Spring / Summer 2019 Major release with significant enhancements After *i*TPM 2019.1.1a is published, no bug fixes will be published to previous versions.

Enhancement candidates for the first half of 2019:

2019 ‘major’ release enhancement candidates that are being considered:

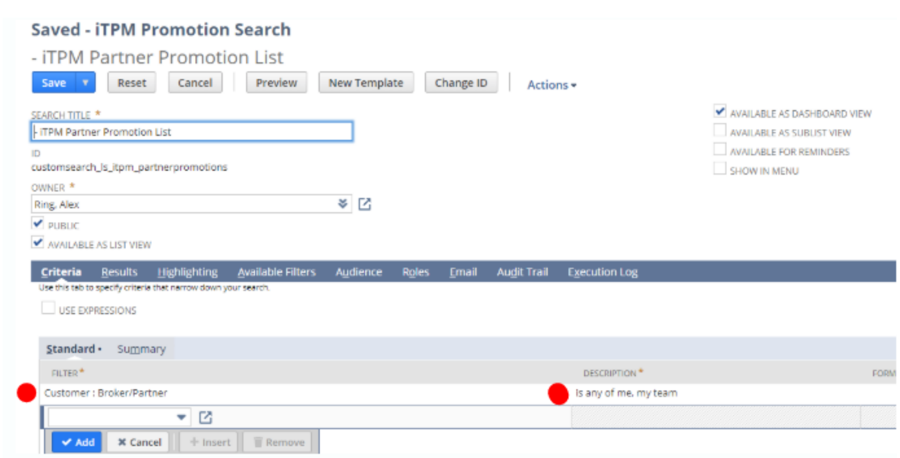
S-02050	Period-based accruals
S-01872	Support line promotions with thousands of items
S-01897	Support NS item groups with 100 or more items
S-01812	Better support for indirect customer promotions
R-01356	Option for PROCESS PLAN to allocation estimated quantity using actual sales over last 52 weeks for allocation
R-01366	Option to override GL-account on settlement (to use an accrual account)
S-01957	Option to adjust event-based accruals for over-spends
S-01938	Change REINVOICE to statement charge

****Note:** These enhancements and changes are subject to change, and may not be included in the next or future releases. Prioritization changes, technical challenges, and other factors may cause these stories to be delayed or rescheduled.

1.4 Known issues:

As of the release date, the following are being considered for future *i*TPM releases**:

- DO NOT change the concurrency of any *i*TPM scheduled scripts without first consulting CG Squared. Script concurrency should be 1 for all *i*TPM scripts. Concurrency of 2 or more may result in duplicate settlement and other records.
- D-01223 In some NetSuite accounts, the price level doesn't always default correctly. CG2 is working with NetSuite support to determine the root cause case #3233263. Work around is to manually select the price level when creating a new promotion if it doesn't default correctly, or to populate a default price level for customers.
- D-01241 Settlement list views (Regular, Voiding, Adjust Spend) only work for Admin roles. This is a NetSuite issue, case# 3303681. This defect may be fixed in a 2018.2.1**c.**
- D-01252 Under some circumstances, settlements less than $1.00 can get stuck in process status. *i*TPM now prevents settlements less than $1.00 until we change the allocation methodology to accommodate this. For small amounts, use the EXPENSE button to get the spending to the correct GL-account. You can use ADJUST SPEND on the promotion to add the amount if required.
- D-01253 Promotion KPIs don't match the Promotion Comparison Report for Estimated Spend. The promotion KPIs under the KPI subtab are correct. Under some circumstances the Promotion Comparison Report KPIs aren't being updated. This defect will be fixed in a 2018.2.1**c.**
- D-01254 Net Liability KPIs are not correct for closed promotions on the Promotion Comparison Report. Net Liability is correct on the promotion KPI subtab. This defect will be fixed in a 2018.2.1**c.**
- D-1256 The new *Related Applied Transactions* subtab on a deduction is doubling the credit memo amount in the view. The amount is correct, it is only doubled in the view. This defect may be fixed in a 2018.2.1**c.**
- S-01981 If you have partner management **not enabled** when you update or install *i*TPM, the criteria in the saved search, "*- iTPM Partner Promotion List*" will not have the correct search criteria. After you enable partner management, edit this search to enter the correct criteria shown below, or simply update *i*TPM again. This is only an issue if you have brokers that use your Advanced Partner Center role and *i*TPM.



2.0 Technical Perspective

This chapter contains technical details for the NetSuite administrator.

For details on how to update your existing iTPM bundle, or install iTPM for the first time, go to 3.0 Installing the Bundle.

2.1 Bundle Details

The following describes iTPM Release 2018.2.1b.

iTPM Bundle Details	Release 2018.2.1b
Design, development, testing and publishing	November 11, 2018- January 24 2019
Bundle release date	January 25, 2019
Publisher ID	44277 CG Squared, Inc.
Bundle ID	Bundle # ~~238399~~ replaced by ---> **264626**
NetSuite Built-for-NetSuite review?	2018.1.3 was tested with Netsuite 2018.2 and received Built-for-Netsuite certification. BFM testing of iTPM 2018.2.1b will being the week of January 25, 2019.
Admin tasks required AFTER installation?	**Yes.** Review and update preferences. See 3.6 Administrator tasks (First-time install or Update)

IMPORTANT: DO NOT UNINSTALL iTPM from your live production account.
Doing so after go-live will result in the loss of iTPM data, including all promotional data and custom transaction records that resolve your short-pays.

IMPORTANT: Install iTPM in your SANDBOX account for testing BEFORE installing in your live production account. While iTPM is easy to install, and requires a minimum amount of effort to configure, **trade promotion has a material impact on your company's financial statements.** We recommend sandbox testing prior to go-live in production.

Helpful Hint: This is an incremental update to the previous version. For prerequisites, and additional iTPM technical details, **refer to release Notes for previous releases you didn't install**, available at www.i-TPM.com/admin-training-resources

2.2 What's New (Technical Perspective)

In addition to the end-user features identified in 1.1 Completed development stories, this version includes the following changes to *i*TPM.

- S-02011, S-02012, S-02036 To prevent the creation of bad data through splits, additional we are performing additional validations. One client accidentally replaced an imported CSV file with a different file in NetSuite after the file was imported, but before it was used to split a deduction. While this is an unusual situation, we added redundant validations to prevent an incorrect CSV file from being used; Check deduction status before split, and Check split lines before CSV split import.
- S-01708 To prevent users from accidentally installing two versions of *i*TPM into the same account, *i*TPM now validates that *i*TPM is NOT installed before a new copy of *i*TPM can be installed. This does NOT prevent the user from updating *i*TPM.

2.3 What's Removed

This version removes the following from *i*TPM:

- S-02021 Item fulfillment permission is not a required permission for the *i*TPM deduction role. It has been removed from that role.
- S-02005 Remove the validation on the deduction follow-up date when editing a deduction. This is to prevent mouse clicks when simply editing another field on a deduction. (Client request)
- S-02004 Remove CHECK-CREATE permission from three standard *i*TPM roles. This permission is no longer needed, now that we do not support Apply-to-Check.

3.0 Installing or Updating the *i*TPM Bundle

3.1 Prerequisites to first-time installation

Skip this section if you have already installed *i*TPM and you are just updating *i*TPM.

Note: *i*TPM requires all of these prerequisites to work properly in your NetSuite accounts.

Sandbox and Release Preview Accounts:
- Only Administrators can install the *i*TPM managed bundle in sandboxes and release preview accounts.
- The user that installs *i*TPM is the 'owner' of *i*TPM.

Production:
- Only Administrators can do the first-time install of *i*TPM.
- CG Squared must push *i*TPM updates to production accounts. After testing the new version in your sandbox, contact CG Squared to request an *i*TPM update to your production account.

Note: *i*TPM does NOT support custom segments. If you have custom segments, email support@cgsquared.

Before you install the *i*TPM SuiteApp in your sandbox, make sure that the following features are enabled on your sandbox and production accounts:

Go to ***Setup > Company > Enable Features***.

Company subtab
- Multiple Units of Measure

Accounting subtab
- Accounting
- A/R
- A/P

SuiteCloud subtab
- Custom Records
- Advanced PDF / HTML Templates
- Client SuiteScript
- Server SuiteScript
- SuiteFlow
- Custom Transactions

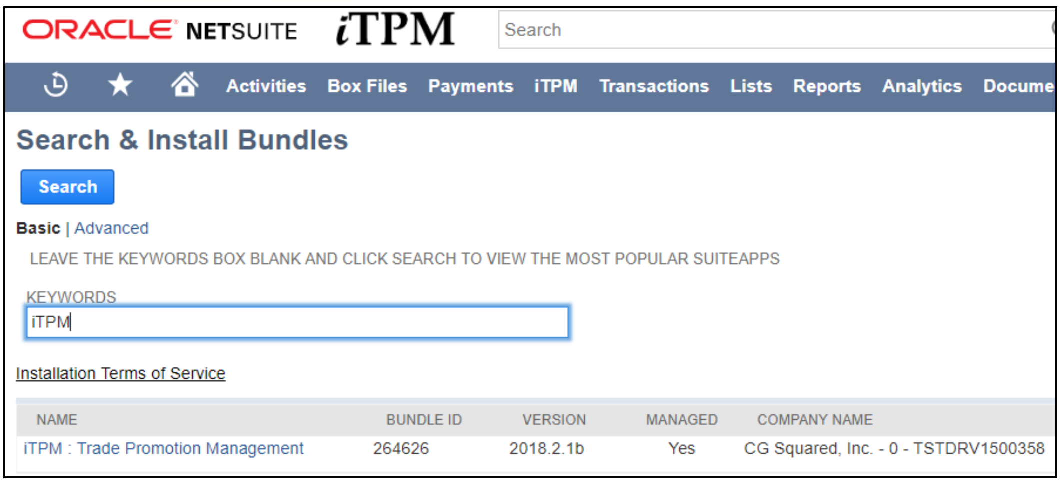
3.2 First-time Sandbox or Production Install (Skip if Updating)

Bundle installation should generally follow the standard installation steps provided in the NetSuite Help Center topic *Installing Bundles into Your NetSuite Account*.

1. After you confirm prerequisites in section 3.1, go to ***Customization > SuiteBundler > Search & Install Bundles*** to install the *i*TPM SuiteApp.

IMPORTANT: Do NOT use the Install process to UPDATE *i*TPM in your SANDBOX if *i*TPM is already installed in your sandbox. Doing so will install two copies of *i*TPM in your sandbox, and require a sandbox refresh to fix.

2. Use the following information to ***search* for the *i*TPM SuiteApp**:
   - **Bundle Name:** iTPM : Trade Promotion Management
   - **Bundle ID: ~~247293~~ -> 264626**



2. Click on the ***iTPM : Trade Promotion Management*** link
3. Click ***INSTALL*** and follow directions. (*I AGREE*, and *INSTALL BUNDLE*).
4. After *i*TPM is successfully installed, be sure to perform Administrator tasks:

   a. See section [3.3 First-time Administrator Set-up Tasks (Skip if Updating)](#)

   b. See section [3.6 Administrator tasks (First-time install or Update)](#)

IMPORTANT: Install *i*TPM in your SANDBOX and/or Release Preview account for testing BEFORE installing in your live production account. While *i*TPM is easy to install, and requires a minimum amount of effort to configure, **trade promotion has a material impact on your company's financial statements.** We recommend sandbox testing prior to go-live in production.

Note: If the Install button is not available:
- The *i*TPM SuiteApp may not have been shared with your account. To get access to *i*TPM, contact the *i*TPM Help Desk at support@cgsquared.com.

3.3 First-time Administrator Set-up Tasks (Skip if Updating)

Important: You, as *i*TPM administrator, are responsible for setting up preferences, NetSuite settings, and performing other tasks that are required by this updated version of *i*TPM. Be sure to read ALL of the tasks in this chapter before you begin testing *i*TPM in your sandbox.

1. After installing *i*TPM, complete all the administrator tasks listed in section 3.6 for the installation.
2. Then use the *Administrator User Guide* to setup and configure *i*TPM for the first time:

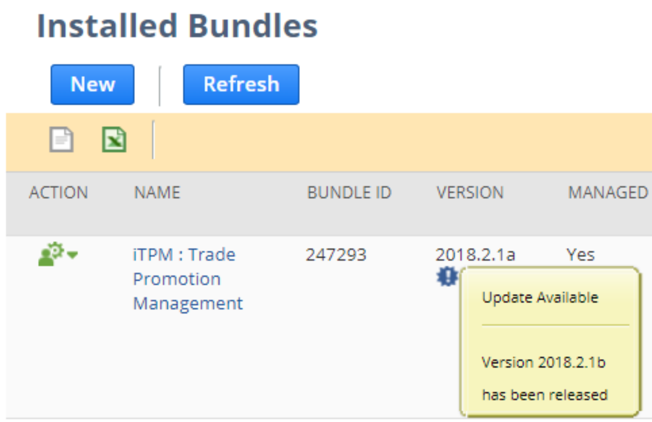
Setup tasks:	**Status / Notes**
Step 1: Setup the GL-accounts for Trade Promotion	
Step 2: Setup *i*TPM off-invoice discount item	
Step 3: Setup *i*TPM Preferences	
Step 4: Setup Promotional Activity (Optional)	
Step 5: Setup Promotion Types	
Step 6: Setup Deduction Reason Codes, Research Status, Next Steps, & Group	
Step 7: Flag Items available for *i*TPM allowances	
Step 8: Create NetSuite Item Groups for Allowances (optional)	
Step 9: Set the Default Sales Order Status	
Step 10: Setup *i*TPM roles and permissions	
Step 11: Show both item code and display name (optional)	
Step 12: Configure Event-Based Accruals (Optional)	
Step 13: Publish Dashboard Portlets and Reminders (optional)	
Step 14: Configure Event-Based Accruals (Optional)	
Step 15: Update your new Item checklist / workflow	
Step 16: Update your Month-end close checklist and reconciliation	
Step 17: TPM Cut-over date and legacy data options	
Step 18: Test your *i*TPM Setup	
Step 19: Document your transition plan for promotions / deductions	

3.4 UPDATE *i*TPM in you Sandbox (or Release Preview account)

Updating a NetSuite Managed Bundle should generally follow the standard NetSuite updating steps provided in the NetSuite Help Center.

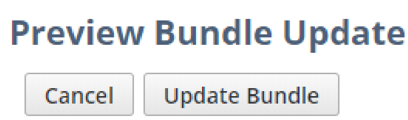
To update the *i*TPM SuiteApp,

1. Go to ***Customization > SuiteBundler > Search & Install Bundles -> LIST***.
2. Scroll up/down and find *i*TPM.
3. If *i*TPM is already installed in your account, NetSuite will show you that an update is available.
4. Click on the  green person/gear to the left of *i*TPM for a drop-down menu.
5. **On the drop-down menu select *UPDATE*.** **(DO NOT SELECT UNINSTALL)**

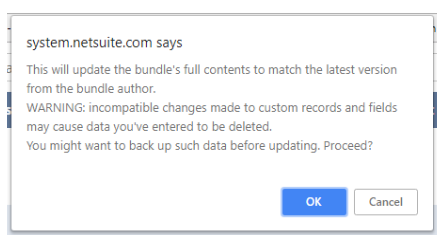


6. Follow the NetSuite update steps.

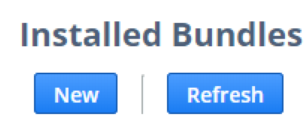
   a. Click UPDATE BUNDLE.



   b. Click OK.



   c. Click REFRESH to see the status of the *i*TPM update.



After *i*TPM is updated, be sure to perform ALL administrator tasks listed in section 3.6.

3.5 UPDATE *i*TPM in production

ONLY CG Squared can push updates of *i*TPM in production accounts. Contact CG Squared to request your production account be updated to this *i*TPM version.

IMPORTANT: DO NOT UNINSTALL *i*TPM from your live production account.
Doing so after go-live will result in the loss of *i*TPM data, including all promotional data and custom transaction records that resolve your short-pays.

IMPORTANT: UPDATE *i*TPM in your SANDBOX and/or Release Preview account for testing BEFORE UPDATING *i*TPM in your live production account. While *i*TPM is easy to update, **trade promotion has a material impact on your company's financial statements.** We recommend sandbox testing prior to updating in production.

1. Before you request *i*TPM to be installed for the first time, confirm your production account has all of the necessary prerequisites.
2. Email support@cgsquared.com to let us know you want *i*TPM installed in your production account. CG Squared will typically push the update after business hours, as recommended by NetSuite. Your administrator will receive notification that *i*TPM has been updated.
3. **After the update is done, review and perform the administrator tasks listed in section 3.6.**

3.6 *i*TPM Administrator tasks (After every Install or Update)

Important: If you skipped any *i*TPM updates, be sure to read the release notes for previous versions. Look for the link to the *iTPM Release Notes Archive LINK*. The archive has release notes for all previous version of *i*TPM. You may need to perform some or all of those administrator tasks for the previous versions. If in doubt as to what tasks to perform after *i*TPM is updated, contact support@cgsquared.com.

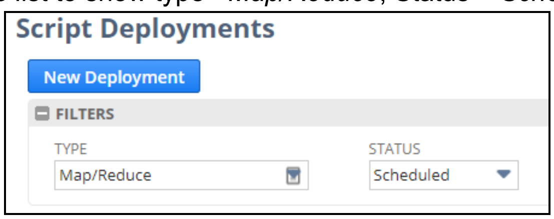
There are two tasks for administrators after *i*TPM is installed or updated from 2018.2.1a to **2018.2.1b:**

TASK #1: Review Reason code values after updating *i*TPM . You can now associate a GL-account with each reason code to save mouse clicks when using the EXPENSE button on deductions. See the Deduction Management user guide for more details.

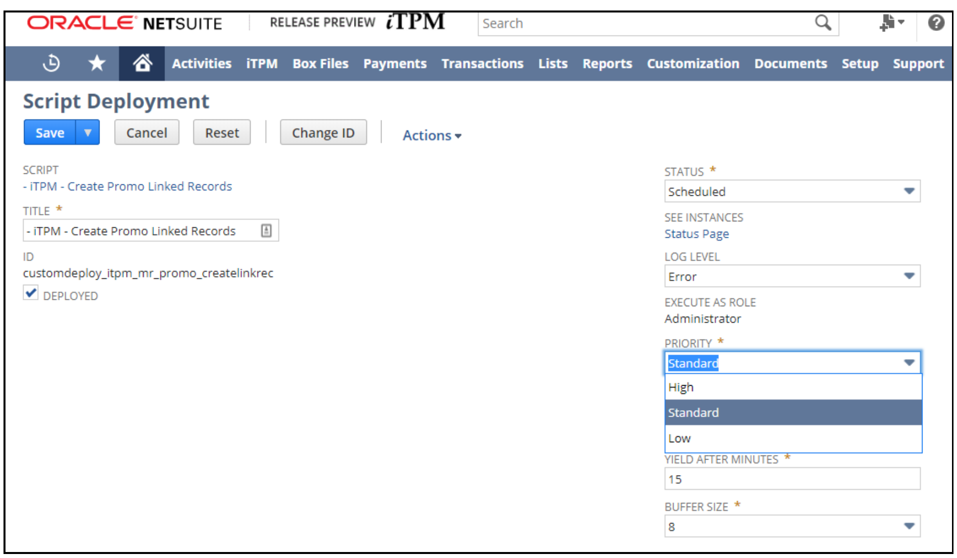
TASK #2 OPTIONAL: Change the priority of the PROCESS PLAN script from standard to HIGH.

To reduce the time it takes for the PROCESS PLAN button to process your plans, we suggest changing the *-iTPM Create Promo Linked Records* to HIGH priority.

1. Go to ***Customization -> Scripting -> Script Deployments***
2. Filter the list to show type= *Map/Reduce*, Status = *Scheduled scripts*.



3. **EDIT** the script, *- iTPM - Create Promo Linked Records*
4. Change Priority from STANDARD to HIGH, and click **SAVE**



3.7 Suggested Sandbox Testing

The following are suggested use-cases *i*TPM administrators should add to your standard testing scripts:

- While many changes in this 'minor' update are cosmetic, we still recommend clients that have sandboxes test *i*TPM before updating their production account.

⚠ **Note: If you installed the *i*TPM managed bundle, your user ID cannot be used for role-based testing.** As the implementer, your ID may show workflow buttons that should not be visible based on the role you are testing. **Role-based testing should be done with user IDs that have not installed or updated the *i*TPM managed bundle**.

⚠ **IMPORTANT: Install *i*TPM in your SANDBOX account for testing *BEFORE* installing in your live production account.** While *i*TPM is easy to install, and requires a minimum amount of effort to configure, **trade promotion has a material impact on your company's financial statements.** We recommend sandbox testing prior to go-live in production.

⚠ **Important: You, as *i*TPM administrator, are responsible for setting up any new preferences**, NetSuite settings, and performing any other tasks that are required by this updated version of *i*TPM. Be sure to read ALL of the tasks in this chapter before you begin testing *i*TPM in your sandbox.

⚠ **Important: You, as *i*TPM administrator, are responsible for testing *i*TPM *BEFORE*** installing *i*TPM into your NetSuite production account. Best business practice is to install each new release in your sandbox for testing BEFORE installing in your production account.

4.0 Support

4.1 Troubleshooting

Email your issues to support@cgsquared.com.

Please include the following in your email to *i*TPM support:

- Your name, your NetSuite role, and the sandbox or account with the issue.
- Describe the issue.
- If appropriate, describes the steps or actions that led up to the issue.
- Add screenshots if possible.
- Give us contact information, along with your current timezone.
- Replies to support emails do NOT create new support tickets, it just adds to the email thread.

4.2 Contacting Support

There are two ways for you to get **help**, report **issues**, ask **questions**, and share your enhancement **ideas**:

How to get Help!	Description
Online documentation	Use www.i-tpm.com/admin-training-resources for User Guide PDFs and Training videos.
Email	Just email your question or issue to support@cgsquared.com.

5.0 Terms and Conditions

5.1 NetSuite Disclaimer

NetSuite does not test, approve, or support SuiteBundles developed by our partners or our customers.

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5.2 *i*TPM Terms and Conditions

By installing the *i*TPM managed bundle, you accept your ***i*TPM Acceptance Form Agreement** entered into between the purchasing company ("**Customer**") and CG Squared, Inc. (**CG^2**), and agree to be bound by the ***i*TPM License Agreement**, www.i-TPM.com/professional-services-agreement, incorporated as **Exhibit A**, and the **Professional Services Agreement**, www.i-TPM.com/professional-services-agreement, incorporated as **Exhibit B**.

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