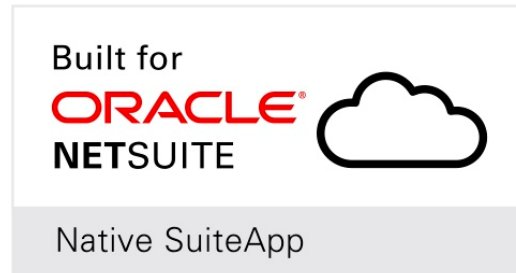


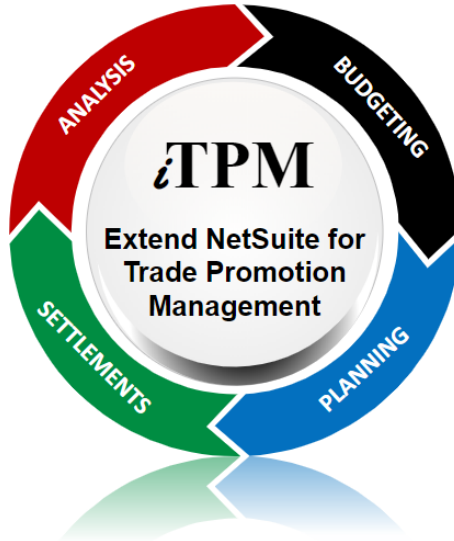
Integrated Trade Promotion Management



User Guide: NetSuite Basics for iTPM

January 25, 2019

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CG Squared, Inc.

CG Squared designs, develops and supports the iTPM SuiteApp. CG Squared, or CG², stands for **C**onsumer **G**oods **C**onsulting **G**roup. Our passion and 100% focus is trade promotion for the CG industry. We have more than 30 years experience delivering closed-loop, trade promotion management solutions. CG² is committed to providing you world-class software and services:



- **Implementation services** to get iTPM configured, installed and ready for live production.
- **Training**, so your staff can efficiently use iTPM for trade promotion management.
- **Help Desk** support to answer your questions and help solve any issues.
- **Ongoing software enhancements**, with two new releases scheduled every year.
- Optional **TPM best-practices consulting**.

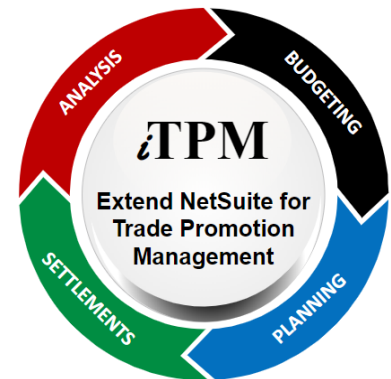
Learn more and follow our TPM blog at www.CGquared.com.

CG² services are bound to terms of service of the Professional Services Agreement between the parties.

iTPM Closed Loop Trade Promotion Management

iTPM is a native SuiteApp built for NetSuite. iTPM is published and installed into your NetSuite account as a managed bundle. CG² works to make new releases of iTPM backward compatible so you can enjoy new features every few months.

This User Guide is written for people that need to use iTPM, have no experience using NetSuite, and have not received any basic NetSuite training. This User Guide is a quick read before reading any of the other iTPM user guides.



This manual has been designed for two-sided printing to save paper!

We invite you to follow our iTPM blog at www.i-TPM.com.

Because we publish updates to iTPM twice each year, features and screenshots in this User Guide may not match what you see in iTPM. This document is not intended to be a reference for NetSuite features, functionality and version releases.

The iTPM Subscription is bound to terms of service of the iTPM License Agreement between the parties.

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One Page Quick Reference: NetSuite Basics

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

Documents at www.i-TPM.com/training-resources.com

iTPM

iTPM Overview

Setup ▶

Promotions ▶

Deductions ▶

Resolutions ▶

Help ▶

Login to NetSuite to access iTPM

1. Go to www.Netsuite.com.
 - a. The first time you go to this web page, **click on Log in** at the top right corner.
 - b. After the first time NetSuite will go directly to the login screen
2. Enter your email address and password.
3. Look for **iTPM** on the main control tab menu.

Change your password

- Go to the home page.
- Look for the **Settings Portlet**
- Click on **Change Password** and follow directions.

Setup challenge questions BEFORE you forget your password.


- Go to the home page. Look for the **Settings Portlet** (Scroll down to find this portlet.)
- Click on **Update Security Questions**, enter your password, Select and answer three questions, then click **SAVE**.



Helpful Suggestions for using NetSuite

- Be patient. [Wait for the browser](#) spinning wheel to stop before you click on your web page
- [Wait for the form to completely load](#).
- [Avoid using the browser's back arrows](#). Instead, try to use the buttons and links in the web page
- [What's taking so long?](#) Double click on the Oracle logo, or go to <https://status.netsuite.com>
- [VIEW promotions to see the workflow](#) You will only see workflow buttons when you **VIEW** promotions.
- **Help, I'm lost!** Just go back to the [iTPM main menu](#), or go back using [recent records](#).
- [Save time using the LIST and ARROW links](#) when viewing a promotion, settlement or deduction.

Time saving features in NetSuite

- **Recent Records:** Hover over the recent record icon  in the upper left of your screen. Simply click on anything in the list to go back and open these records that you viewed or created.
- **Input Fields:** Type in a few letters in any free-form data entry field and let NetSuite find what matches. i.e., type in ALB, to find Albertsons / Safeway
- **Save options:** **Save** saves your data and returns you to the previous form. **Save and New** saves your data, and gives you another blank form. **Save and Copy** saves your data, and copies data from your last form to save time. One of these options may save you time when entering data.
- **Entering Dates:** You can **enter a "T" for today's date**, and a **"Y" for yesterday's date**. **"+" advances one day**, **"-" goes back one day every time you enter it**. If you need other dates, you can use the calendar icon, or just type in the date.
- **Open links in new tabs:** You can directly click on links to drill-down into your data. If you want to see that data AND keep your place on the current form, **just hover over the link, right-click, and select "Open link in new tab"**.

[List views, Dashboards, and forms can be customized in NetSuite.](#) (If your role has the permissions)

1.0 Introduction to NetSuite Basics

This User Guide is **for users that have not received formal NetSuite training** that need to use iTPM.

- **First-time NetSuite users should read this User Guide before the other iTPM User Guides.**
- The User Guide will provide **just the basics of standard NetSuite** features and functionality

1.1 What's NetSuite?

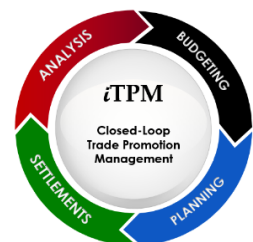
NetSuite is the #1 leading ERP in the Cloud.

- ERP stands for Enterprise Resource Planning, and is the software that companies use to manage all aspects of their business. ERPs manage financial accounting, inventory, warehouses, manufacturing, human resources, CRM customer relationship marketing, and more.
- Because NetSuite is in the Cloud, companies do not need to purchase any additional computer equipment to host the ERP. NetSuite enables companies to access their ERP from anywhere using any device that has a compatible browser.
- NetSuite is a global, multi-lingual, multi-currency ERP.
- NetSuite is highly flexible and customizable.

1.2 What's iTPM?

iTPM is the only Trade Promotion Management software solution *inside* NetSuite.

- The iTPM software is written using the NetSuite development platform. iTPM is not a separate stand-alone software solution. There's no nightly data synchronization between the TPM solution and the ERP. iTPM data is real-time. For example, new customers, vendors, product items, new sales orders, new short-pays and other data created or edited in NetSuite is immediately available within iTPM because iTPM is inside NetSuite.
- iTPM has the same look-and-feel as NetSuite.
- To current NetSuite users, iTPM has the familiar NetSuite look-and-feel, and can be access with their existing NetSuite login ID and password.
- Brokers and first-time NetSuite users may be unfamiliar with NetSuite, but will find NetSuite user friendly and easy to use..



2.0 Get Started

NetSuite is a cloud-based solution. That means it is designed and optimized for access through your Internet Browser. **You will need an Internet connection and device with a browser to use iTPM and NetSuite.**

2.1 Supported Browsers

The table below was published on the NetSuite website as of January 24, 2019. Click here to see current [supported browsers](#).

Browsers by Platform

NetSuite is supported in the following browsers and operating systems:

Browser	Platform
Internet Explorer 11* (1) *OpenAir is not supported	Windows 10 Windows 8.x Windows 7 with Service Pack 1 (SP1) or higher
Google Chrome 58 (2)	Windows 10 Windows 8.x Windows 7
Microsoft Edge (Anniversary Update and later)	Windows 10 (Anniversary Update)
Mozilla Firefox 60 (2)	Windows 10 Windows 8.x Windows 7 Windows Vista Mac OS X 10.6 and newer
Safari 10	Mac OS X 10.10 or newer

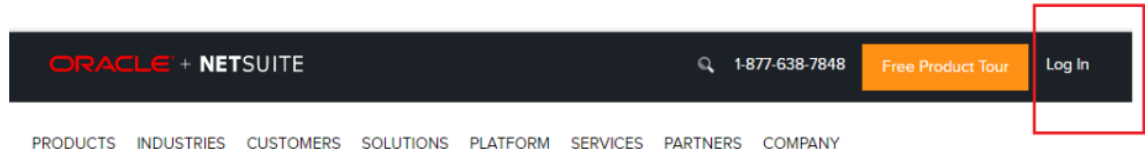
(1) If you are using Internet Explorer 11, and have difficulty accessing NetSuite, add the website to your security zones as a trusted site. In your Internet Explorer 11 browser, go to Settings > Internet Options > Security > Trusted Sites. Click Sites, and add the wild card https://*.netsuite.com as a website to the zone. Click OK.

(2) New versions of browsers with rapid development cycles (Google Chrome and Mozilla Firefox) are certified one time each quarter. You should turn on automatic updates for these browsers to receive the latest security updates.

2.2 Login to NetSuite

Go to www.Netsuite.com.

The first time you go to this web page, **click on *Log in*** at the top right corner of the page.



Enter your email address and password. (Your NetSuite password is your iTPM password.)

The image shows the NetSuite login page. At the top is the 'ORACLE | NETSUITE' logo. Below it is a dark blue horizontal bar. The login form consists of two input fields: 'Email address' and 'Password'. Below the password field is a checkbox labeled 'Remember Me'. A blue 'Log In' button is positioned below the form. At the bottom of the form area, it says 'FOR AUTHORIZED USERS ONLY'.

Helpful Hint: The next time you log in to NetSuite, you will not see the NetSuite visitor's page. NetSuite will automatically prompt you with the above login screen, saving you one mouse click.

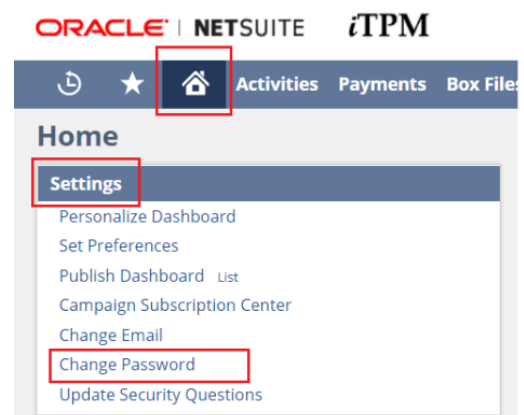
Helpful Hint: Bookmark www.netsuite.com in your browser to save time.

2.3 Change your password

To change your password,

- **Go to the home page.**
- Look for the **Settings Portlet** (You may have to scroll down to find this portlet.)
- Click on **Change Password** and follow directions.

Helpful Hint: If you represent multiple manufacturers using iTPM, changing your password for your email address in one account changes the password for all your accounts.

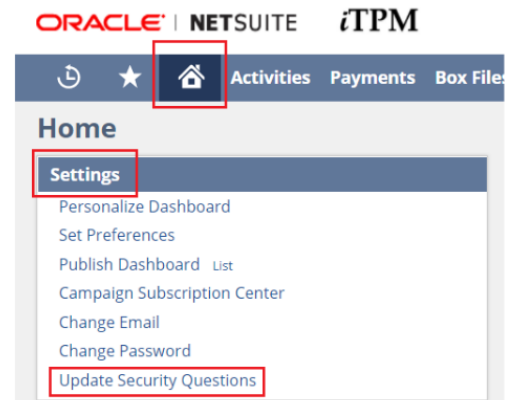


2.4 Create or Update your NetSuite Security Questions

If you forget your password, you can answer questions to get back into NetSuite.

To select your challenge questions and enter your answers,

- **Go to the home page.**
- Look for the **Settings Portlet** (You may have to scroll down to find this portlet.)
- Click on **Update Security Questions** and follow directions.
 - Enter your current password
 - Select your three questions
 - Enter your three answers
 - Click SAVE.



 A screenshot of the 'Update Security Questions' form in NetSuite. The form is titled 'Update Security Questions' and has a 'More' link on the right. It includes a 'Save' button and a 'Cancel' button. Below the buttons, there's a note: 'Please select and provide answers to the 3 questions shown below. The answers to these questions are used to verify your identity if you forget your NetSuite password. Answers are not case-sensitive.' Another note states: 'After successfully completing your security questions, you may reset your password by using the "Forgot your password?" link on the login page.' The form contains three sections, each with a question dropdown and an answer text field.

Section 1: 'CURRENT PASSWORD *' with a text field.

Section 2: 'QUESTION 1' with a dropdown menu showing 'What was your childhood nickname?'. Below it is 'ANSWER 1 *' with a text field.

Section 3: 'QUESTION 2' with a dropdown menu showing 'In what city did you m...se/significant other?'. Below it is 'ANSWER 2 *' with a text field.

Section 4: 'QUESTION 3' with a dropdown menu showing 'In what city or town was your first job?'. Below it is 'ANSWER 3 *' with a text field.

At the bottom, there is a checkbox labeled 'HIDE ANSWERS' which is checked.


Important: You can get locked out of NetSuite if you don't set up security questions.



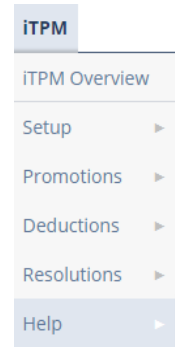
Note: When traveling, NetSuite may challenge you with security questions.

When you login to NetSuite from a new location, like an airport, Starbucks, etc., NetSuite may ask you to answer security questions before you can access iTPM. This additional level of security helps protect your trade promotion data from hackers and unauthorized access.

2.5 Your iTPM menu

Your access to standard NetSuite functionality and to iTPM is controlled by the iTPM administrator. You will be given access to the modules and features of iTPM you need to do your assigned trade promotion tasks.

Contact your iTPM administrator if you do not see the iTPM menus you need, or if you have access to menus you don't need.



iTPM Menu	What does it do?	Who needs access to this?
iTPM Overview	Click on this to see your customized iTPM dashboard.	Everyone that uses iTPM.
Setup	This is for administrators to configure iTPM.	iTPM administrators only.
Promotions	View, Create, or Edit trade promotions.	All users that plan and manage trade promotions.
Deductions	View, Create, and manage customer short-pays	The Finance team, including A/R and A/P
Resolutions	View or Create Settlement Requests, Credit Memos and Journal Entries used or created by iTPM. Settlements resolve open deductions.	The Finance team, including A/P
Help	Links to our online user guides. www.i-TPM.com/training-resources	All iTPM users

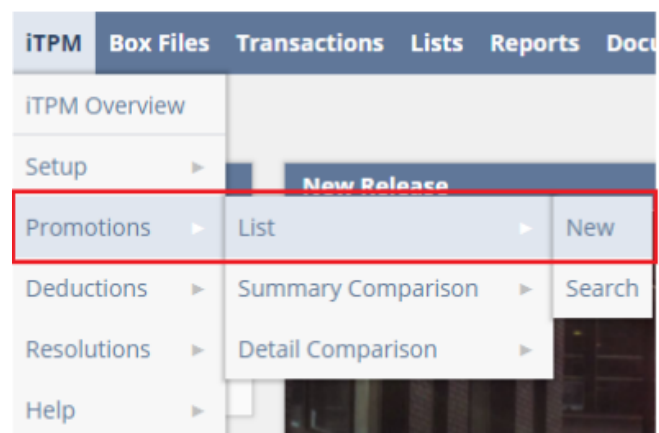
The following is standard NetSuite functionality.

Mouse over the menu to see the complete menu.

Examples:


To see a *LIST*, hover over the iTPM menu and click on *LIST* right.

To create a *NEW* promotion, hover over *LIST* and click *NEW*.



2.6 Training in the Sandbox

What is the Sandbox? This is the NetSuite account used for **training and testing**.

- It's called the *Sandbox* because you can play and do anything without breaking anything.
- Promotions created during training will be discarded.
- The sandbox may be turned off and not available after your training.
- On your list of your roles and NetSuite accounts, you will see  after the account name.



Important: If you don't see **SANDBOX** in the upper left corner of every web page, you are **NOT** in the sandbox.


'Production' is the system-of-record for the manufacturer's accounting and financial statements.

- Don't make ANY changes or create promotions, settlements, deductions, etc. in the live production account until you are authorized to do so by the manufacturer you represent.
- Promotions, settlements, etc. created in the production account are official promotions.
- Production will always be available because it is the manufacturer's ERP, even if you don't have access to it.



Helpful Hint: [Read the next section](#) to learn how to switch between your sandbox and production accounts.

What is a Release Preview account? Release Preview is used to **test the next version of NetSuite**.

- Only your NetSuite administrators have access to a release preview account.
- The Release Preview account is only available for a limited time before each NetSuite update.
- On your list of your roles and NetSuite accounts, you  will see after the account name.



2.7 Access to a sandbox (and Brokers with Manufacturer Principals)

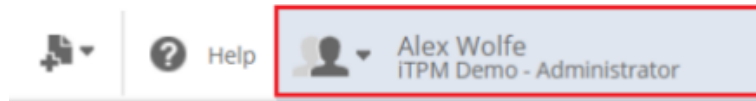
You may have access to **MORE THAN ONE NetSuite account or role, and/or NetSuite account:**


- You may have access to a sandbox AND a live production account.
- As a broker, you may need to use iTPM for more than one manufacturer. If each manufacturer used your same email address to give you access, **you can login once and switch between manufacturers!**
- It's possible you may be given more than one NetSuite role. Example: one for only promotion planning, and another one for only deduction management. However, typically you'll have only one NetSuite role per manufacturer.

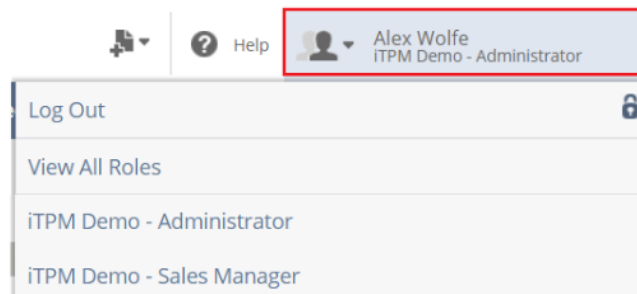


Helpful Hint: If you don't want to use this feature to switch between your principal's NetSuite accounts, use a different email address for each manufacturer's NetSuite login.

To see your current role and NetSuite database account, look at the upper right corner of your screen. You'll see your name, the name of the database account, and a description of your current role.



Mouse over your name, or use the  drop down to see what, if any, roles are available to you.



To go between switch roles or manufacturers, click on the role or account.

Example above: Click on the role *iTPM Demo - Sales Manager* to change from the *Administrator* role to the Sales Manager role in the same NetSuite database account called *iTPM Demo*.

If you are a broker with multiple principles using iTPM, the ability to quickly switch accounts can be a real time-saver. Your email address and one password gives you quick access to all of the manufacturers using iTPM that you manage. Each principle using iTPM will appear in this drop down list.



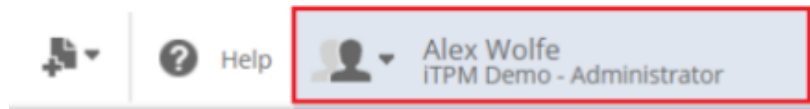
Helpful Hint: As you switch between NetSuite accounts and principals, be aware that business rules within each principal's promotion types may be different. Manufacturers have the ability to configure and enforce their own unique TPM business rules by promotion type.

2.8 Set your Default Login Account

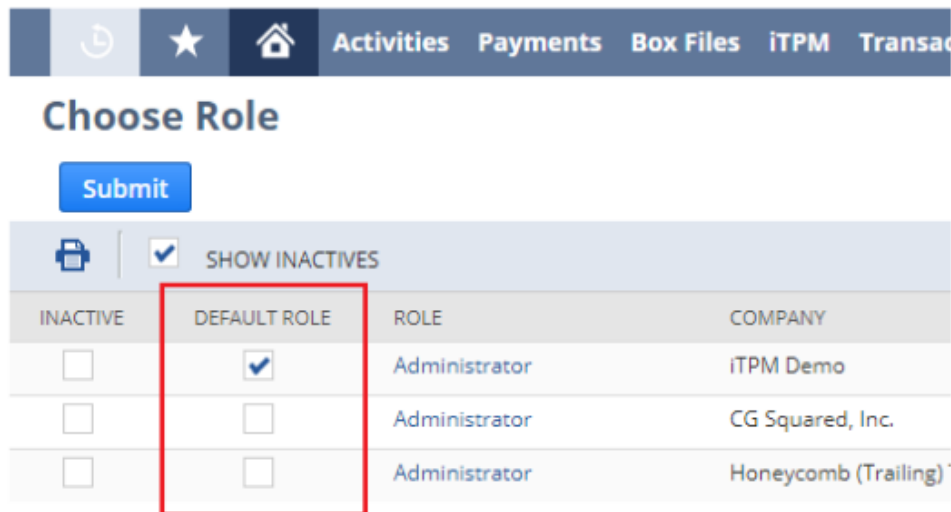
If you are a broker, some of your manufacturers will be on a different planning cycle. To save mouse clicks, sometimes you may want to have a different account be the first one you see after you login. Here's how to change your default login account:

Login to NetSuite.

Click on your name in the upper right corner of your screen to get a list of all your roles and manufacturers using iTPM.



Check the box next to the account you want to be the first, or default account that you see after you login. You can always [switch to another account](#). You can also repeat these steps and select a different account as your default.

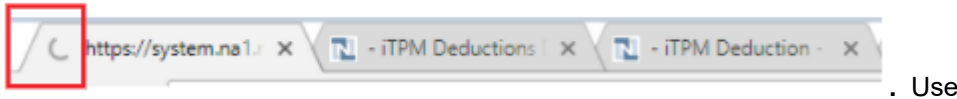


3.0 Helpful Suggestions

3.1 Wait for the browser spinning wheel to stop

Most browsers use a spinning wheel on the browser tab to show you the form is still loading

Wait for the spinning wheel to stop before you start clicking on the form.



3.2 Wait for the form to completely load...

Even after you can see your web page, parts of the web page may still be loading. Some forms in NetSuite have scripts and other customization running on top of the standard NetSuite functionality.

When you see the following, **wait just a few seconds before clicking or typing...**

- You click on a drop-down menu but nothing happens...
- You type a few letters into a field and nothing happens...
- You see part of the form is missing...
- You click on a sub-tab and see the message, 'loading'
- You see the spinner on your browser tab still spinning...

If you see any of the above, wait just a few seconds for your form to complete.

If you think you've waited long enough, you can try one of the following:

- **Use your browser's refresh button to refresh the page.**



Note: Doing this may clear all the values you entered on the page before saving.

- Click *BACK* in the form and try again
- If typing in a few letters, just click on the icon to get a list

3.3 Avoid the browser back-button

If you need to go back, most NetSuite forms have a *BACK* or *CANCEL* button on the form. Use these NetSuite buttons.

If you want to go to several pages back to a previous form or menu, it's faster and better to just use some of the built-in short-cuts and time-saving features:

- Try [recent records](#); **hover, then one mouse click.**
- To keep the current page open and go to a new one, try right click, [open in a new tab](#)

3.4 Waiting? Find out why!

You have two ways to check the performance of NetSuite:

- AFTER your form has loaded, Double-click on the **Oracle | NetSuite** logo. (screen below)
- Go to <https://status.netsuite.com> to check the status of the NetSuite data centers.

The screenshot shows the iTPM NetSuite interface. At the top, the Oracle | NetSuite logo is highlighted with a red box. Below the navigation bar, the 'iTPM Promotion List' is displayed. A 'Performance Details' modal is open, showing a table of performance metrics. The table is highlighted with a red box. The modal also displays the page URL, email address, and time.

Performance Details	
Total	0.811
Server	0.124 (15.29%)
Server Suite Script	0 (0.00%)
Server Workflow	0 (0.00%)
Network	0.209 (25.77%)
Client	0.478 (58.94%)

Page: /app/common/custom/custrecordentrylist.nl?rectype=625&whence=
Email: alex.ring@cgsquared.com
Time: 10/4/2017 2:43 pm GMT +4

Measure	Measure description, and how to use it.	Example:
Total	How long did you wait for the web page, in seconds?	.8 seconds, or 8/10
Server	How much of the total time was NetSuite building your web page?	15.29%
Server SuiteScript	How much of NetSuite's time was used by scripts? If this is a high percentage, there may be an issue with the script.	0%
Server Workflow	How much of NetSuite's time was used by workflows? If this is a high percentage, there may be an issue with the workflow.	0%
Network	How much of the total time was traveling over the Internet? If this is a high percentage, there may be an issue with your internet connection, your firewall, or something between your PC and the NetSuite datacenter.	25.77%
Client	How much of the total time was your PC building the web page? If this is a high percentage, there could be an issue with your PC, including your browser, Virus software, etc.	58.98%

3.5 VIEW promotions to see the workflow (Not *EDIT*)

Here are some helpful iTPM hints:

VIEW your promotion to see workflow buttons like SUBMIT, APPROVE, etc. When you have a list of promotions, settlements, or deductions, click VIEW instead of EDIT. You will NOT see iTPM workflow buttons when you are EDITING the promotion. (Same for settlements and deductions.)

Just because you see a button, it doesn't mean you can perform the task.

Sometimes you will not see the buttons you expect. Workflow or permissions may hide the buttons.

This is normal behavior, and is designed into NetSuite and iTPM to prevent users from creating bad data, and from performing tasks they aren't allowed to do.

- Sometimes BUTTONS on forms ARE visible to you, but workflow or permissions prevent you from performing the task.

Example: Standard NetSuite functionality will show an EDIT button on your promotion. However, the promotion is ACTIVE, so iTPM prevents you from changing an active promotion. You will click EDIT, but you will just VIEW the promotion because it's locked by iTPM workflow.

- Sometime BUTTONS are NOT visible because of workflow or permissions.

Permissions Example: If your role doesn't have permissions to APPROVE a promotion, you can view a submitted promotion, but you will NOT see the APPROVE / REJECT buttons.

Workflow Example: You have permissions to approve promotions, but you will not see the APPROVE buttons if the submitted promotion is already ACTIVE. iTPM workflow only allows you to approve FUTURE promotions. (This task is reserved for iTPM administrators.)

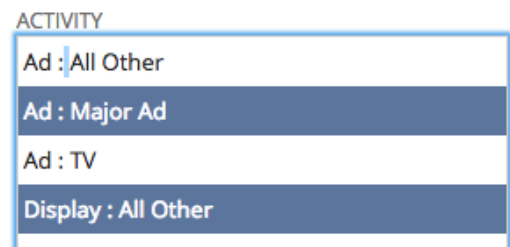
3.6 How to select multiple things on a drop-down menu

You can select multiple things on some menus in iTPM.

Hold down the **CONTROL** or **CRL** key and click on the menu items you want. (Apple Command key on a Mac)

To un-select one of your choices, just click the selection again, and it will toggle off.

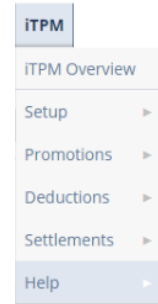
To de-select all of your selections, just let go of the CONTROL key and click on one menu item.



3.7 I'm lost! What do I do?

Sometimes you can end up somewhere in the NetSuite software and you have no idea how you got there, or perhaps how to get back to where you were.

If you were doing something in iTPM, we recommend you simply start over again, by going back to the [the main iTPM menu](#), or use the feature to [go back](#) to the recent promotion, settlement or deduction you were working on.



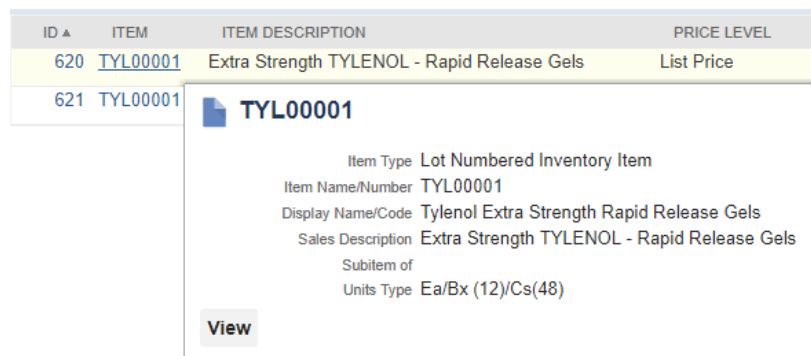
3.8 Why do items, customers, etc. have blue links? Hover pop-ups?

When viewing a list of promotions, you will see items and customers in blue. If you click on these links you can view more details about the customer and items. These links are standard NetSuite functionality.

Example: Hover or, or click on the customer link to view the address and confirm you are planning a promotion for the correct customer.



Example: click on the item description or item number to view the item, and confirm you are giving an allowance to the correct item.




4.0 Time saving features

These time-saving features are optional. Even if you are not a 'power user', you may still find these easy features helpful.

4.1 Recent records

A nice feature in NetSuite is the ability to quickly go back to your recent forms, lists, and other screens.

Hover over the recent record icon  in the upper left of your screen. Simply click on anything in the list to go back and open these records that you viewed or created.



Helpful Hint: To keep your current browser page open *AND* open one of your recent records in another browser tab, **hover over a recent record, Right Click, and select *Open Link in a new tab*.**




Note: You may need to refresh your browser page when using multiple browser tabs. When working across multiple browser tabs, the data you update in one tab does not automatically refresh the data in all your other browser tabs.

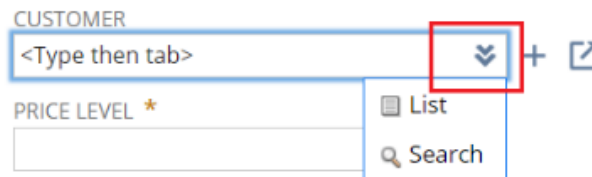
4.2 Input fields: Type in the first three letters...

Another time-saving feature is the ability to type in a few letters in any free-form data entry field and let NetSuite find what matches.

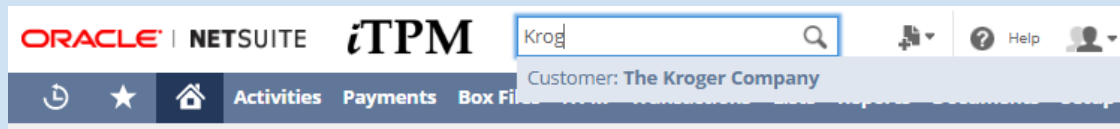
In the example below, you want to create a promotion for Albertsons. You can type in “Alb” and wait a second. NetSuite searches for customers that start with “Alb”, and displays matches below. To select *Albertsons / Safeway*, hover over it and click.




Sometimes the customer name isn't a perfect match. For example, you type in “Kro” for “Kroger”, but it's in NetSuite as “*The Kroger Company*”. If NetSuite doesn't find a match, click on the , then click on *List* or *Search* to find your customer.




Helpful Hint: Another way to find Kroger is to use the NetSuite global search at the top of the page. In the example above, type in “Kroger”, and you'll get a list of all the customers with “Kroger” in the name, including “*The Kroger Company*”.




If you're not sure you've selected the correct customer, you can open that customer record to see the address and other information by clicking on the  icon after you've selected a customer.

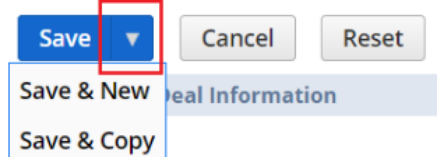


If you've been given rights to create new records, you can use the  icon next to a field to create a new record. Most iTPM users will NOT have this privilege.

4.3 SAVE vs. SAVE & NEW vs. SAVE & COPY (For advanced-users)

When entering data, use the down arrow  to the right of SAVE to see additional save features.

- iTPM Allowances





Action	What it does	When to use it
Save	Saves your data and returns to your previous form.	When you have no more records to enter. When you want to see the results of your data before you enter more data.
Save & New	Saves your current data, and gives you another blank form to keep entering data.	When you want to enter all your data before going back to the previous screen, AND.... When the data you're entering is different, and copy will not save you time.
Save & Copy	Saves your current data, opens another form and copies some of some of your values from your last screen to the new screen.	When you want to enter all your data before going back to the previous screen, AND.... When much of the data you're entering is the same.


4.4 Use “ + ”, “ - ”, “ T ” and “ Y ” in date fields

When entering dates you can **enter a “ T ” for today’s date**, and a **“ Y ” for yesterday’s date**. **Everytime you click +, you will advance one day, and - you will go back one day.** **“M” gets you the last day of the month.**

If you need other dates, you can use the calendar icon, or just type in the date. In the US, month/day/year is most common, while day/month/year is common in European. iTPM and NetSuite support all date formats. Select your preferred format using NetSuite [preferences](#).

Promotion Dates

SHIP DATE - START *  SHIP DATE - END * 

LENGTH IN WEEKS - SHIP 

4.5 How to Open web links in New Tab

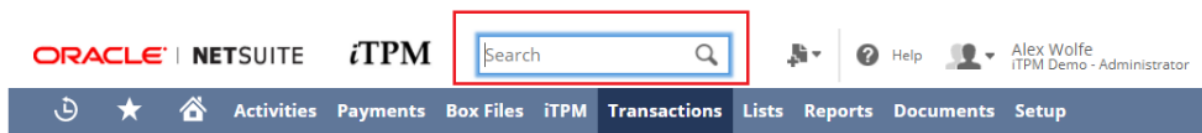
A powerful feature in NetSuite is the ability to have uncluttered screens, but still have quick drill-down into your data to get more detail. Any word or number that's in blue is a web link. You can directly click on that link to drill-down into your data. If you want to see that data AND keep your place on the current form, just *hover* over the link, *right-click*, and select "Open link in new tab".

Example: Below is promotional information shown in an iTPM settlement. To see more detail, simply click or right-click on the promotion description, "July 21 Event".

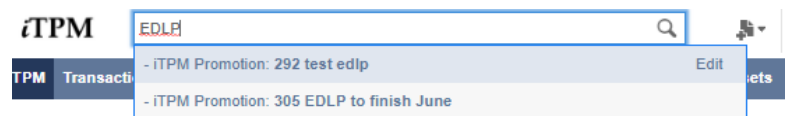
iTPM Promotion Information			
PROMOTION / DEAL (SETTLEMENT)		SHIP START DATE	SHIP END DATE
July 21 Event		7/21/2017	7/28/2017
PROMOTION		NET PROMOTIONAL LIABILITY	
1		0.00	
PROMOTION		TOTAL INCURRED PROMOTION LIABILITY	
		2,000.00	
CUSTOMER		PARENT	
HEB			
CURRENCY	EXCHANGE RATE		
USA	1.00		

4.6 NetSuite 'global' Search to find promotions, deductions, settlements

The NetSuite 'global' search is on every web page at the top of the screen. You can use this to search for many things, including specific transactions, customer names, and even records.



For example, this search for **EDLP** found two promotions with EDLP in the description. Enter **Prom: 212** and NetSuite will return iTPM promotion #212. Enter **Set: 23** for settlement 23, **Ded:113** for deduction 113.

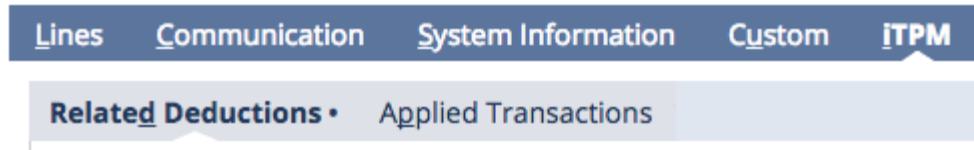


Use [NetSuite help](#) and enter 'Search' in the search box to learn more.

4.7 What are those “DOTs” on Sublists?

If there's a DOT to the right of a sub list, then there are records or information available. If you don't see the DOT, you don't need to click on the sublist

Example: iTPM sublist on a deduction: Below, the DOT to the right of Related Deductions tells you there's information on that subtab, and no dot to the right of Applied Transactions tells you there's no information in that sublist.



4.8 Save time using the LIST and ARROW links

When you click on *VIEW* in a list, you don't have to go back to the list to see the next promotion. You can use these time-saving features:



Click LIST to get back to the list. (That might be faster than clicking on *iTPM*-> *Promotions* -> *Promotions*)

Click the LEFT or RIGHT arrow to move up and down on the list of promotions without going back to the list.

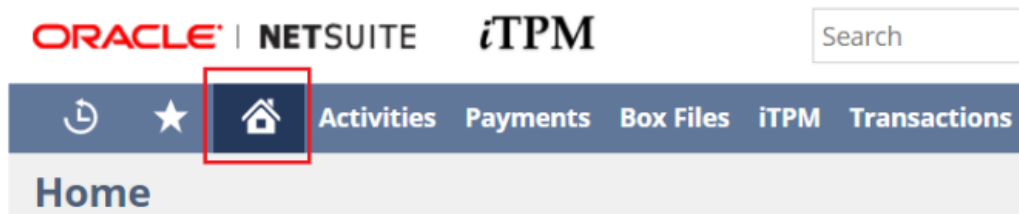
5.0 NetSuite Basics (Optional read)

We suggest you skim over this chapter of Netsuite basics to help familiarize you to NetSuite words and concepts.

- If you email support@cgsquared.com to create a support ticket, the iTPM help desk may use some of these terms in correspondence to you as they work on your issue.
- All the other iTPM User Guides assume you already know these NetSuite basics, and will use some of these terms in the documentation.

5.1 Home icon

At any time you can return to the NetSuite home page and dashboard by clicking on the home icon. You'll find this on the upper left size of your screen.



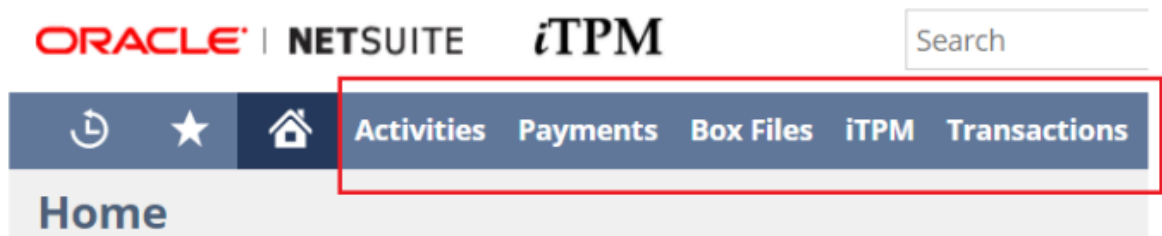
5.2 Center & Center Tab

The NetSuite **CENTER** contains groups of related tasks that a person will typically use in a specific [role](#). The idea is to give each user what they need, and not clutter the web page with functionality they don't need.

Each center has a menu and it's own dashboard.

- You'll see the NetSuite *Center* bar across the top of your screen (red box below).
- Click on one of the tabs (like., iTPM) and you'll see the [dashboard](#) associated with that tab.
- Hover over each tab and you'll see a menu of tasks.

If you've been given permission to see iTPM, you'll see it as one of the center tabs when you login.



5.3 Dashboards

The **NetSuite dashboard** is anything below the the **control center**. Below is an example iTPM dashboard. Click on the iTPM center tab (small red box) to see the iTPM dashboard (big red box below).

You can customize your dashboard to include almost any NetSuite information. Your dashboard can include [lists](#), [Portlets](#), [Saved Searches](#) and more.

The screenshot shows the NetSuite iTPM dashboard. The top navigation bar includes 'ORACLE | NETSUITE', 'iTPM', a search bar, and user information 'Alex Wolfe (TPM Demo - Administrator)'. The main dashboard area is divided into several sections:

- Shortcuts:** Links to 'iTPM User Guide' and 'iTPM Admin User Guide'.
- Settings:** Options to 'Personalize Dashboard', 'Set Preferences', 'Campaign Subscription Center', and 'Edit Custom Tab'.
- iTPM Promotion List:** A table showing promotion events with columns for ID, CUSTOMER, NAME, PROMOTION TYPE, CONDITION, STATUS, and LUMP SUM.
- iTPM Promotion Type List:** A table showing promotion types with columns for NAME and METHODS OF PAYMENT.
- Custom Content:** A message stating 'Portlet not set up. Please set up this portlet by clicking on the menu icon.'

5.4 Roles

NetSuite has roles that control and define what that role can and can't do in NetSuite. NetSuite users are members of one or more roles. As a member of a specific role, you inherit the permissions of that role. For example, a 'broker' role will not have access to the manufacturer's cost-of-goods and profitability, but will be allowed to see items and associated list prices. Your iTPM administrator will create your user ID, give you a role and assign you the appropriate permissions to use iTPM.

Example: The screen below shows Mark Jones is using the *iTPM Demo* account in the role of *Sales Manager*.

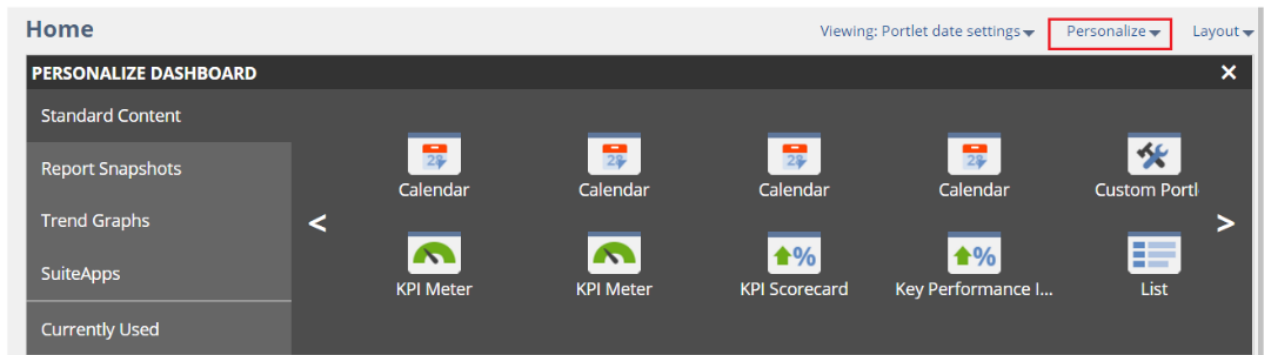
The screenshot shows the NetSuite iTPM dashboard for user 'Mark Jones' in the role of 'Sales Manager'. The top navigation bar includes 'ORACLE | NETSUITE', 'iTPM', a search bar, and user information 'Mark Jones (iTPM Demo - Sales Manager)'. The main dashboard area is divided into several sections:

- Shortcuts:** Links to 'iTPM User Guide' and 'iTPM Admin User Guide'.
- Settings:** Options to 'Personalize Dashboard', 'Set Preferences', 'Campaign Subscription Center', and 'Edit Custom Tab'.
- iTPM Promotion List:** A table showing promotion events with columns for ID, CUSTOMER, NAME, PROMOTION TYPE, CONDITION, STATUS, and LUMP SUM.
- iTPM Promotion Type List:** A table showing promotion types with columns for NAME and METHODS OF PAYMENT.
- Custom Content:** A message stating 'Portlet not set up. Please set up this portlet by clicking on the menu icon.'

5.5 Portlets

Portlets are customizable plug-ins on the NetSuite dashboard. Portlets can be used to show any data in NetSuite. The iTPM example dashboard in section [2.3 Dashboards](#) uses a *portlets* to show a list of promotions and a list of open deductions.

Click on *Personalize* in the upper right corner of your web page to add portlets to any of your NetSuite dashboards, including iTPM.



Use the [NetSuite help](#) for more documentation on how to personalize your iTPM dashboard.

5.6 NetSuite Data

There are three types of data stored in NetSuite:

- **Entities** include individual people and companies. In iTPM, you will select customers that will receive trade promotion allowances.
- **Items:** In iTPM, you will select items or item groups for trade promotion allowances.
- **Transactions:** iTPM will create custom transactions when you process short-pays, when you resolve open deductions, and when you apply settlement requests.

5.7 Lists

Virtually all the data in NetSuite can be viewed in a list or saved search. Much like an Excel spreadsheet, NetSuite lists your data in rows and columns. You have at least two ways to get the data you need:

- Modify the NetSuite list (or iTPM list) using **EDIT VIEW**.
 - Add or remove data columns
 - Change the order of the columns
 - Change the sort order and other attributes
- Create a [saved search](#)
- You can export most lists directly to Excel

5.8 Forms

A form is a web page where you enter data in [fields](#) and create or update transactions and [records](#). Most NetSuite forms have [subtabs](#).

Example Below: This is the main form in iTPM used to create and edit your trade promotions. Notice the blue subtab toward the bottom of the page of this completed trade promotion.

When you build your promotion, you'll enter data at the top of the form and save it. Next you'll work from left to right on the subtabs, starting with **Allowances**.

- iTPM Promotion

Example promotion

Edit Back Actions

Promotion Information

SUBSIDIARY Honeycomb Holdings Inc. : Honeycomb US-East	PROMOTION TYPE EDLP & Other	CUSTOMER Walmart	STATUS Draft	CONDITION Active
CURRENCY USA	TITLE / REFERENCE CODE Example promotion	PROMOTION # 11	PRICE LEVEL List Price	STACKABLE WITH
	OTHER REFERENCE CODE	DESCRIPTION		

Promotion Dates

SHIP DATE - START SHIP DATE - END
2/23/2018 12/31/2018

LENGTH IN WEEKS - SHIP
44.57

Allowances Estimated Quantity Retail Info KPI's Settlement Requests Reports Communication Workflow System Information Box Files Overlapping Promotions

Lump Sum Information

LS AMOUNT LS ACCOUNT
0.00

VIEW - iTPM ALLOWANCES
Default View

New - iTPM Allowances Attach Customize View

EDIT	ID	ITEM	ITEM DESCRIPTION	PRICE LEVEL	IMPACT PRICE	METHOD OF PAYMENT	ALLOWANCE TYPE	UNIT	UNIT PRICE	RATE PER UNIT	% PER UNIT	ALLOW ADDITIONAL DISCOUNTS
Edit	36	ACC00002	Digital Single Line Telephone (.4400) for support calls	List Price	100.00	Bill-Back	Rate Per UOM	Each	100.00	1.00	1.0%	No

5.9 Subtabs

Subtabs help organize data, and help prevent information overload by allowing the user to select the data they want to see. To see information in a subtab, simply click on the word. The subtab being shown will

have a small 'carrot' under the word:

Allowances

Example: Below are the subtabs for a promotion. The *Allowances* subtab has been selected.

EDIT	ID	ACCOUNT	METHOD OF PAYMENT	ITEM	ALLOW ADDITIONAL DISCOUNTS	ITEM DESCRIPTION	ALLOWANCE TYPE	UNIT	RATE PER UNIT
Edit	1	6011 Trade Promotion	Bill-Back	- NIC00001	No	Brand N Size 10, Orig	Rate Per UOM	Case	10.00
Edit	2	6011 Trade Promotion	Bill-Back	- NIC00002	No	Brand N Size 10, Mint	% Discount	Each	1.00

If you need to see all of the data on your web page, including ALL of the sub-tab data, you can click on



the icon on the right side of the subtab bar. (All the way to the right of the red box above.)

This is a toggle. **Click it once to expand all the subtab data. Click it again to collapse the subtabs.**

5.10 Records

When iTPM or NetSuite documentation mentions '*records*', think about rows in an Excel spreadsheet.

Example: Consider a spreadsheet where each row is a promotion. All the rows in your spreadsheet would be called promotion records in NetSuite terminology.

5.11 Fields

When iTPM or NetSuite documentation mentions fields, think about cells in an Excel spreadsheet.

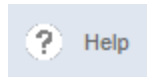
Example: Consider a spreadsheet where each row is a promotion, and the columns describe specific attributes about your promotions, such as start and ending dates, customer, promotion description, etc. In NetSuite, each of these cells would be called 'fields' within the promotion '*record*'.

5.12 Saved Searches

A saved search is a reusable search definition, that can have many advanced search filters and results display options. A saved search can be used to display data on your dashboard, or you can use it to get data only when you need it.

The screenshot shows the NetSuite Help Center interface. At the top, there's a navigation bar with 'ORACLE | NETSUITE' and 'HELP CENTER' links, a search box, and a language dropdown set to 'English (U.S.)'. Below this is a secondary navigation bar with links: 'SuiteAnswers', 'Training', 'SuiteApps', 'User Guides', and 'New Release'. The main content area is titled 'Table of Contents' on the left, listing various topics like 'Account Administration', 'NetSuite Basics', 'SuiteAnalytics (Dashboards, Searches, & Reports)', 'Dashboards', 'Search', 'Finding Records', 'Running Searches', and 'Using Saved Searches'. The 'Using Saved Searches' item is highlighted. The right side of the page shows the article 'Using Saved Searches' with a sub-header and two paragraphs of text explaining what a saved search is and how to use it.

Use [NetSuite help](#)



and enter 'Saved Searches' in the search box to learn more.

5.13 Views

NetSuite allows you to view your data lists the way need to see the data. A view is just the way you look at your data list. **For a different view of your data, click on the down arrow and select another view.**

Click on the column label to sort your data.

Click on the “+” sign next to *FILTER* to show ways to filter options

To customize your own views, go to section [6.1 Customizing Views](#).

Example: Below is a list of promotions. The selected view was created for a dashboard portlet.

- iTPM Promotion List List Search Audit Trail

VIEW Portlet Edit View New - iTPM Promotion

FILTERS

CUSTOMER

- All -
- Unassigned -
- Mine -
- My Team -

PROMOTION TYPE

- All -
- None -
- Hi / Low

CONDITION

- All -
- None -
- Future
- Active

STYLE

Normal

STATUS

- All -
- None -
- Draft
- Pending Approval

☐ SHOW INACTIVES EDIT QUICK SORT TOTAL: 4

EDIT VIEW	INTERNAL ID	ID	CUSTOMER	NAME ▲	PROMOTION TYPE	CONDITION	STATUS	LUMP SUM	SHIP DATE - START	SHIP DATE - END
Edit View	2	2	HEB	*18 July 21 event	Hi / Low	Future	Draft	2,000.00	7/21/2018	7/28/2018
Edit View	4	4	HEB	Dec event (copy)	Hi / Low	Future	Draft	2,000.00	12/1/2017	12/31/2017
Edit View	1	1	HEB	July 21 Event	Hi / Low	Active	Approved	2,000.00	7/21/2017	7/28/2017
Edit View	3	3	Albertsons / Safeway	July 21 one-day event	Hi / Low	Completed	Draft	250.00	7/21/2017	7/21/2017

5.13 Why the asterisk on some fields?

The asterisk tells you that field is required, so you can't leave it blank when entering data.

Example: When creating a new promotion, the asterisks on the iTPM form below show you that the “Other Reference Code” and “Description” are optional, and everything else is required.

Promotion Information

SUBSIDIARY *
Honeycomb Holdings Inc. : Honeycomb Mfg. + ✕

CURRENCY
USA

PROMOTION TYPE *
<Type then tab> + ✕

IMPACT

CUSTOMER
<Type then tab> + ✕

PRICE LEVEL *
[Dropdown]

TITLE / REFERENCE CODE *
[Text Field]

OTHER REFERENCE CODE
[Text Field]

DESCRIPTION
[Text Area]

STATUS CONDITION
Draft Future

STACKABLE WITH

5.14 Help text is on every field

Help is available on every NetSuite screen. Every field has help text.

Example: You're adding retail information and you're not sure what to enter in the % ACV field.

1. Hover over the field description, and you'll see the "*What's this*" pop-up description.

The screenshot shows the 'iTPM Retail Event Information' form. It includes fields for 'ITEM BASE PRICE' (with sub-fields 'EST. EVERYDAY PRICE' and 'EST. MERCH PRICE'), 'ALLOWANCES PER UNIT', and 'ACTIVITY'. The 'EST. PERCENT ACV WITH DISPLAY' field is highlighted with a red box, and a 'What's this?' button is visible next to it. Other fields include 'INACTIVE', 'PROMOTION / DEAL', 'ITEM', and 'ITEM DESCRIPTION'.

2. Click on the field to see the help text. Example, click on "*Est. percent ACV with display*".

The 'Field Help' pop-up window displays the following text: 'This is a measure of the anticipated display support, between 0 and 100%. Higher values represent stronger in-store support for this deal.' Below this, it shows the 'Field ID: custrecord_itpm_rei_estacvdisplay'.

5.15 Scripts

Scripts can be used to customize NetSuite by performing tasks and processing data.

iTPM uses scripts. For example, when you copy a promotion from last year to next year, an iTPM script runs in the background, so you can continue to working on other tasks in NetSuite while the script copies the promotion.

NetSuite limits how often scripts can run. Scheduled scripts are not allowed to run more often than every 15 minutes.

5.16 Print a promotion, settlement or deduction

If you need to print a hard copy of any NetSuite web page, follow these steps to see more of your web page on paper.

When you print a web page with subtabs, by default you will not see the information under every subtab.

Example: Using your browser to print your promotion will only show the allowances, and no other data.

- iTPM Promotion

Alex test: update actuals

[New Settlement](#)

Promotion Information

SUBSIDIARY	PROMOTION TYPE	CUSTOMER	STATUS	CONDITION
Honeycomb Holdings Inc. : Honeycomb	Scan (UPDATE using actuals)	Acera	Approved	Active
US-East	TITLE / REFERENCE CODE	PROMOTION #	PRICE LEVEL	STACKABLE WITH
CURRENCY	Alex test: update actuals	36	List Price	
USA	OTHER REFERENCE CODE		DESCRIPTION	

Promotion Dates


SHIP DATE - START	SHIP DATE - END	PERFORMANCE - START	PERFORMANCE - END
1/1/2017	12/31/2017	1/1/2017	12/31/2017
LENGTH IN WEEKS - SHIP	LENGTH IN WEEKS - PERFORMANCE		
52.14	52.14		

Allowances Estimated Quantity Retail Info KPI's Settlement Requests Reports Communication Workflow System Information Box Files C

VIEW
Default View

Item ID	Item Name	Unit	Price	Discount	Quantity	Amount	Amount	Amount
503 ACC00004	Merlin 4412D: The most powerful features avail in a 12 button display phone	Each	1.00	0.31%	100	0	100	100
504 ACC00005	A great phone with 24 programmable feature buttons	Each	1.00	0.26%	200	0	200	200
505 ACC00007	50 Button Digital Console	Each	1.00	0.35%	400	0	400	400

[New Settlement](#)

To include all the subtab data when you browser print, click on the  icon at the right of the subtab.

Example: Promotion with expanded subtabs for browser printing:

- ITPM Promotion

Alex test: update actuals

New Settlement

Promotion Information

SUBSIDIARY Honeycomb Holdings Inc. : Honeycomb US-East	PROMOTION TYPE Scan (UPDATE using actuals)	CUSTOMER Acera	STATUS Approved	CONDITION Active
CURRENCY USA	TITLE / REFERENCE CODE Alex test: update actuals	PRICE LEVEL List Price	STACKABLE WITH	
	PROMOTION # 36	DESCRIPTION		
	OTHER REFERENCE CODE			

Promotion Dates

SHIP DATE - START 1/1/2017	SHIP DATE - END 12/31/2017	PERFORMANCE - START 1/1/2017
LENGTH IN WEEKS - SHIP 52.14		PERFORMANCE - END 12/31/2017
		LENGTH IN WEEKS - PERFORMANCE 52.14

Allowances

Lump Sum Information

LS AMOUNT	LS ACCOUNT
1,000.00	6011 Trade Promotion

- ITPM Allowanceses (3)

VIEW

Default View

545 ACC00004	Merlin 4412D: The most powerful features avail in a 12 button display phone	List Price	325.00	Bill-Back	Rate Per UOM	Each	325.00	1.00	0.31%	Yes	100.0%
546 ACC00005	A great phone with 24 programmable feature buttons	List Price	379.99	Bill-Back	Rate Per UOM	Each	379.99	1.00	0.26%	Yes	100.0%
547 ACC00007	50 Button Digtal Console	List Price	285.99	Bill-Back	Rate Per UOM	Each	285.99	1.00	0.35%	Yes	100.0%

Estimated Quantity

- ITPM Estimated Quantities (3)

VIEW

Default View

503 ACC00004	Merlin 4412D: The most powerful features avail in a 12 button display phone	Each	1.00	0.31%	100	0	100	100
504 ACC00005	A great phone with 24 programmable feature buttons	Each	1.00	0.26%	200	0	200	200
505 ACC00007	50 Button Digtal Console	Each	1.00	0.35%	400	0	400	400

Retail Info

- ITPM Retail Event Informations (0)

VIEW


Default View

No records to show.

KPI's

KPI Summary	KPI Summary : Lump Sum	KPI Summary : Bill Back	KPI Summary : Off Invoice
ESTIMATED SPEND : PROMOTION 1,700.00	ESTIMATED SPEND : LUMP SUM 1,000.00	ESTIMATED SPEND : BILL BACK 700.00	ESTIMATED SPEND : OFF INVOICE 0.00
LE SPEND : PROMOTION 1,700.00	LE SPEND : LUMP SUM 1,000.00	LE SPEND : BILL BACK 700.00	LE SPEND : OFF INVOICE 0.00
MAXIMUM LIABILITY : PROMOTION 1,006.00	MAXIMUM LIABILITY : LUMP SUM 1,000.00	MAXIMUM LIABILITY : BILL-BACK 6.00	MAXIMUM LIABILITY : OI 0.00

To collapse your web page and see the subtabs again, click on at the right side of any bar.

NOTE: You will not see  until you HOVER over the blue divider bar.

6.0 Features for NetSuite Advanced Users

We've tried to design iTPM with screens, forms and reports with everything you need, so you don't have to customize anything. Use this chapter to make changes and customize iTPM to your specific needs.

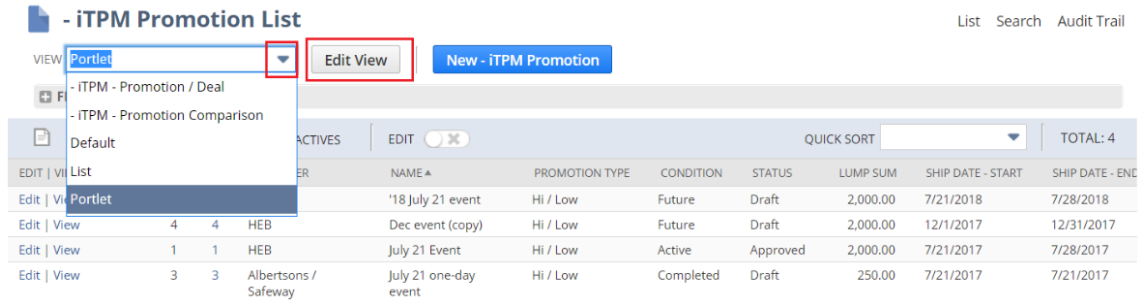
6.1 Customizing Views

You can customize your views and lists if your iTPM administrator gives you this permission.

Why would you customize your view?

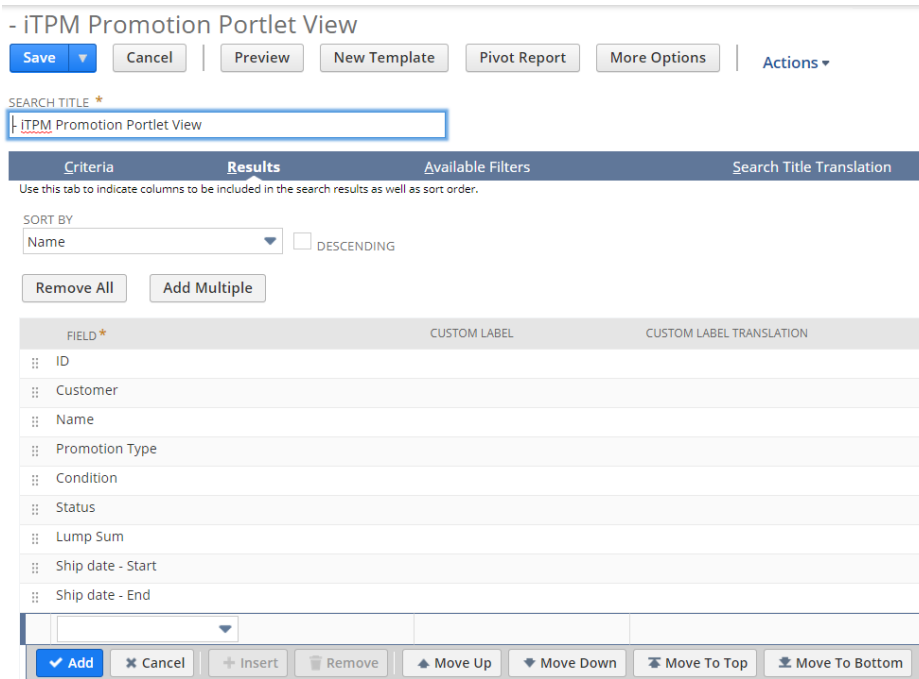
- Change what columns you see, and the order of the columns
- Add another filter

Use the down button  and select a view, including ones you created.



NAME	PROMOTION TYPE	CONDITION	STATUS	LUMP SUM	SHIP DATE - START	SHIP DATE - END
'18 July 21 event	Hi / Low	Future	Draft	2,000.00	7/21/2018	7/28/2018
Dec event (copy)	Hi / Low	Future	Draft	2,000.00	12/1/2017	12/31/2017
July 21 Event	Hi / Low	Active	Approved	2,000.00	7/21/2017	7/28/2017
July 21 one-day event	Hi / Low	Completed	Draft	250.00	7/21/2017	7/21/2017

Use the **Edit View** to customize your view. Use the [NetSuite online help](#) to learn more, or use a Google search to find free training videos on customizing your NetSuite views.



FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION
ID		
Customer		
Name		
Promotion Type		
Condition		
Status		
Lump Sum		
Ship date - Start		
Ship date - End		

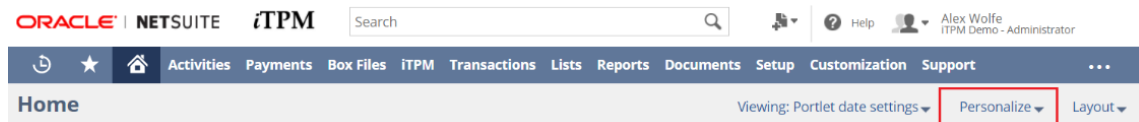
6.2 Customizing your Dashboard

NetSuite has powerful dashboards that you can customize to your specific needs.

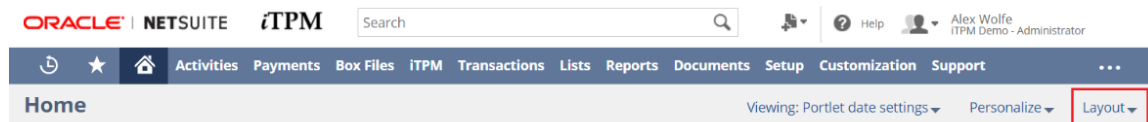
Why would you customize your view?

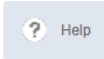
- Instantly see what's important to you every time you login
- You want to save mouse clicks by adding [saved searches](#) and [views](#) to your dashboard
- You want to add [portlets](#) and KPIs to your dashboard to see your data graphically

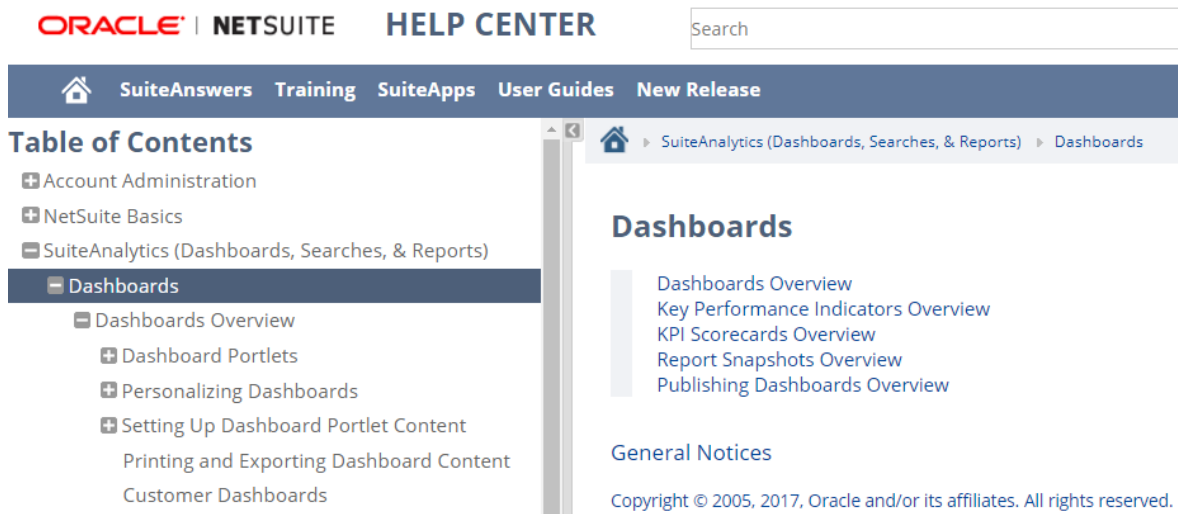
Click on **Personalize** in the upper right corner to add customize your Dashboard.



Click on **Layout** in the upper right corner to select the number of columns in your dashboard.



For more information on how to customize your dashboard, click on the  in the upper right corner to use the [NetSuite Help Center](#):



6.3 Customizing Forms

CG Squared strives to make iTPM web pages meet your needs out-of-the-box. Sometimes, however, your needs may be different from the typical user. NetSuite makes it easy for users to customize form without complex software coding.

Why would you customize your form?

- Move fields around
- Add fields, hide fields.

To customize one of your forms, click on Customize in the upper right corner of the web page.



Note: You may not have the privilege to customize your forms. Your iTPM and NetSuite administrators must give you this privilege.



Helpful Hint: If you have ideas on how to make iTPM forms better, email your idea to support@cgsquared.com

6.4 NetSuite Preferences

To change your preferences,

- Go to the home page.
- Scroll up and down to look for the **Settings Portlet** (a box somewhere on your dashboard)
- Click on the **Set Preferences** link
- Click on a sub-tab and enter data or select options from menus.

Example:

Click on the **Appearance sub-tab**.

Select your color theme for NetSuite.

Set Preferences

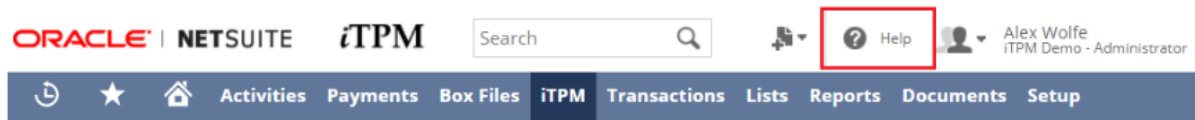
7.0 iTPM Help!

There are two ways to get help.

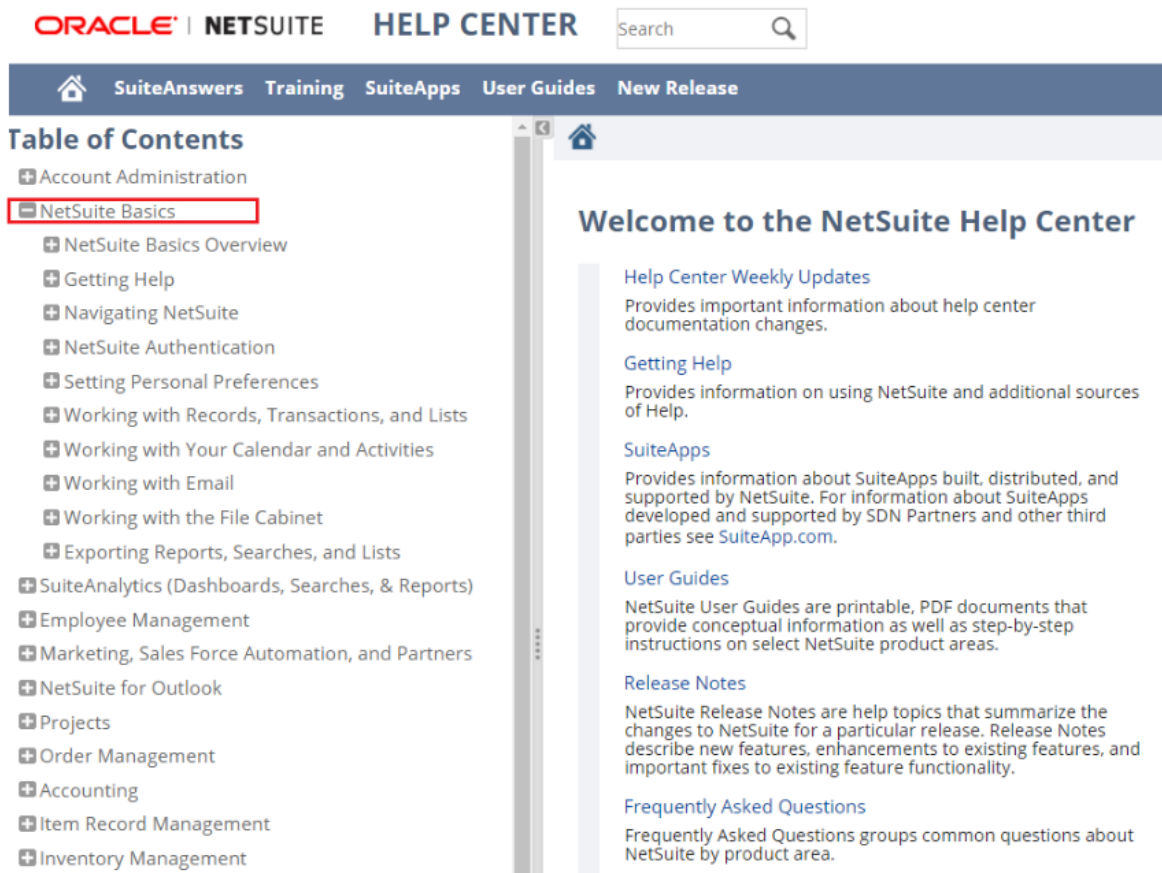
- **NetSuite has extensive online** help you can use to learn the basics of NetSuite.
- **iTPM has on-line documentation** to help you use iTPM for trade promotion management.

7.1 NetSuite Help

Click on **Help** in the upper right corner of your screen to use NetSuite on-line help.



In the *NetSuite HELP Center*, the *NetSuite Basics* topics will be most helpful for iTPM users.



7.2 iTPM Help

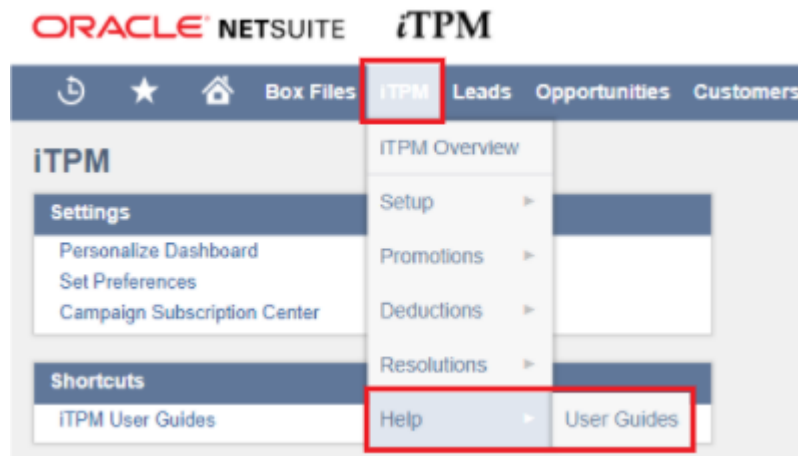
There are 2 ways for you to get **help** from the iTPM help desk, report **issues**, ask **questions**, and share your enhancement **ideas**:

How to get Help!	Description
Online documentation	Use www.i-tpm.com/training-resources for User Guide PDFs and Training videos. You don't have to remember this web URL. Access this directly from inside Netsuite from the iTPM menu.
Email	Just email your question or issue to support@cgsquared.com .

Access iTPM Online Documentation:

If you have appropriate permissions to see the iTPM menu, you also have easy access to our online documentation.

Click **iTPM -> Help -> iTPM User Guides** to open our web page with links to our User Guides and training videos.



You can also access our online documentation by typing this link into your browser:

www.i-tpm.com/training-resources

Help By Email: Email your support question or issue to support@cgsquared.com.

- Your email will create a support ticket so we can answer your question or fix your issue.
- You will get an email reply with an iTPM support ticket number in the subject line.
- iTPM support staff will follow-up with you by email, and by phone if necessary
- You will receive periodic email updates on the status of your support issue



Helpful Hint: Are you done reading this User Guide? **There are more User Guides and Training Videos for iTPM:** Go to www.i-TPM.com/training-resources for access to User Guides for Promotion Planning, and for Settlements and Deduction Management.