

# Quick Reference: TPM PROMOTIONS

HELP! Email questions & issues to <a href="mailto:support@cgsquared.com">support@cgsquared.com</a>

◮ FIRST TIME NETSUITE USER? Read NetSuite Basics User Guide at www.i-TPM.com/training-resources.com **Promotion CONDITION based on dates Promotion Workflow: YOU control Deal STATUS Method of Payment (MOP)** Future: Promotion hasn't started Draft: Submit Drafts for approval. Billback: Allowances paid sometime AFTER the transaction. Active: Promotion is running. Pending Approval: Deal waiting for approval. Completed: Promotion is over. Approved Official promotion. Off-invoice: Allowances applied AND visible on the order. You don't control this Rejected: Deal wasn't approved. Net-bill: Allowances applied but NOT Voided: Stop this promotion. Condition is calculated using ship dates. visible on the order. Closed: No more settlements expected.

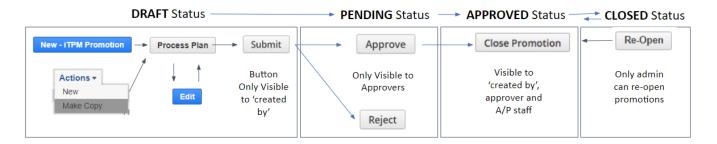
COPY PROMOTIONS to save time. (ACTIONS-> MAKE COPY) Steps to create and submit a NEW promotion for approval: 1. New Promotion: Click on iTPM -> Promotions -> List -> New 2. Who gets this promotion? Under Promotion Information , select Customer & More: A: Correct Subsidiary? B: Select promotion type: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

Analyse & Compare Promotions : Go to -iTPM -> Promotions -> Comparison Summary or -iTPM -> Promotions -> Comparison Detail					
Promotion Spending KPIs	Estimated	Latest Estimate	Expected Liability	Net Liability	Actual
	What you <b>THINK</b> will happen.	What is <b>most likely</b> to happen.	Expected cost as of today, including paid and unpaid amounts.	What you owe but haven't paid.	What has happened that's been paid or resolved as of today.



## 1.0 Get Started

Below is an overview of *i*TPM promotion workflow:



#### **DRAFT Status:**

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

## **PENDING Status**

• 7. Someone will APPROVE or REJECT your promotion.

### **APPROVED status**

 9. When promotions become active or completed, promotions are available to RESOLVE DEDUCTIONS.

Use the promotion KPIs to review deductions and claims matched to each promotion:

- Compare your estimated promotion cost to the Latest Estimate for the promotion.
- Review Net Liability; This is what iTPM thinks you owe, but haven't paid yet.
  (Net Liability = Expected Liability minus Actual Spend.)

#### **CLOSED** status

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

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



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