Integrated Trade Promotion Management
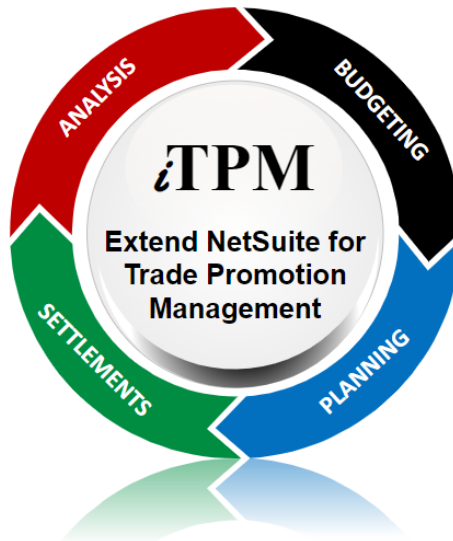

Built for
ORACLE
NETSUITE

Native SuiteApp
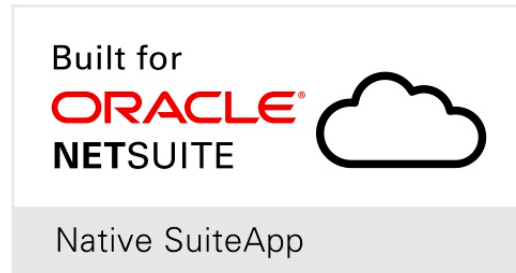
*i*TPM Admin Release & Install Notes

Version 19.1.2 Update

July 26, 2019

Revised July 30, 2019

CG Squared, Inc.
3001 North Rocky Point Drive East, Suite 200, Tampa Florida 33607
support@CGsquared.com

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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.

*i*TPM

Quick Reference: UPDATE *i*TPM 18.2.5, 19.1.1 to 19.1.2

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 2.6 iTPM Administrator tasks (After first-time install or Update).
We test *i*TPM using the Chrome browser.

⚠️ **You are required to update to 19.1.2 on or before September 27, 2019**. Any NetSuite accounts not updated by this date will be notified when their account will be updated. *i*TPM.

Milestone	UPDATE *i*TPM: Tasks for the *i*TPM Administrator	Status / Comments
1. *i*TPM 19.1.2 is available.	As time allows, **read Chapter 1 and Section 2.6** in these technical release notes and the *What's New In 19.1.1 / 19.1.2*	
2. Update your sandbox Skip to step 5 if you don't have a sandbox.	To **update your sandbox**, follow instructions in section 2.4 UPDATE iTPM in you Sandbox (or Release Preview account) to update your sandbox to *i*TPM 19.1.2. If you don't have a sandbox, update and test in your Release Preview account if available. **If you don't have a sandbox or release preview account, skip to step 5.**	
3. Perform admin tasks in your sandbox	**Perform admin tasks** as described in 2.6 *i*TPM Administrator tasks (After first-time install or Update)	
4. Test!	**Test *i*TPM.** Suggested areas to include are in section 2.7 Suggested Sandbox Testing	
5. Authorize update to your production	**Email CG Squared** to update *i*TPM in production, described in 2.5 UPDATE *i*TPM in production	
6. Perform admin tasks in production	**Perform admin tasks** as described in 2.6 *i*TPM Administrator tasks (After first-time install or Update)	
7. Monitor	Monitor *i*TPM to confirm it's working as expected.	

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19.1.2 Update Quick Reference

1.0 Overview

1.1 Enhancements in _i_TPM 19.1.1 & 19.1.2

The following are the top enhancements to _i_TPM version 19.1.2:

- ○ S-01897 Support creating promotion allowances using NetSuite item groups with 100 or more items. This makes it easier to create allowances for a large number of items.
- ○ S-02092 Option to remove all _i_TPM off-invoice discounts from a sales order. This makes it easier to correct off-invoice allowances when something goes wrong.
- ○ S-02089 Option to apply _i_TPM off-invoice discounts to invoices. Use this when your off-invoice allowances are only applied to your invoices and not to the NetSuite sales order.
- ○ S-02095 Performance dates added to promotion list & comparison reports. This is helpful for scan down and other promotions that are not directly related to what you shipment.
- ○ S-02133 Reinvoice using Statement charge (not journal entry)
- ○ S-02129 Allow partial expensing of open deduction in the Bulk Expense CSV import.
- ○ S-02125 Option to SPLIT and EXPENSE at the same time (Also CSV Split)
- ○ S-02122 New helpful sublists on credit memos and invoices; a saved search to show all deduction related to an invoice, including ones created from the credit memo(s) linked to an invoice
- ○ S-02114 Combine apply & remove _i_TPM discount codes so that _i_TPM allowances can't be duplicated if re-applied to a sales order or invoice
- ● S-02126 Allow partial expensing of open deductions through a new EXPENSE button. Rename the existing EXPENSE function QUICK EXPENSE.
- ● S-02127 Provide option to change Reason Code on SPLIT, and CSV SPLIT.
- ● S-02130 Update the _i_TPM Expense Queue to support Reason Codes.
- ● S-02131 Use a customer record flag to determine if ship or order dates are used to apply off-invoice allowances to sales orders or invoices.

Other enhancements:

- ● S-02081 Allow the KPI Refresh to 'skip' items that are marked as inactive. This allows the KPI refresh to update the KPIs for all the other active items in a promotion.
- ● S-02094 Filter the drop-down menu in a deduction based on the subsidiary of the deduction. As part of this change, make the subsidiary field on the reason code form a required field.
- ● S-02067 New KPI Summary fields to store KPI values
- ● S-02115 Add reference code as a filter field in the default deduction list view.
- ● S-02121 Add _Other Reference code_ and _Memo_ as columns to a sublist on the invoice form
- ● S-02110 NetSuite workbook: Determine how to add customer to the accrual log workbook
- ● S-02097 Add transaction column to link _i_TPM Discount Logs with the transaction line
- ● S-02118 Populate the summary KPI record with net liability to support NetSuite workbook analysis using KPI summary records.

- S-02140 Apply *i*TPM discounts (disable user event process) so that off-invoice allowances will always be applied by the script that runs every 15 minutes.
- S-02137 Add *i*TPM - > *Resolutions -> Statement Charges* to the *i*TPM Menu
- S-01284 iTPM Preferences are not valid for Elimination subsidiaries
- S-02101 Create a saved search for reminders that shows sales orders being processed by *i*TPM
- S-02142 Change the filter on *i*TPM Preferences to only show Other Charge Items in the item drop-down list
- S-02131 Use a new customer record flag to determine if ship or order dates are used when applying OI to sales orders. If there are no order dates in the promotion, use ship dates.
- D-01285 Do not show the reinvoice button if the role does not have permission to create statement charges. This will prevent bad data from being created.
- S-02139 Change the reports on sales orders and invoices from saved searches to Suitelets. For customers with thousands of promotional allowances, this approach prevents speeds up viewing sales orders.
- S-02107 Create a new MOP called Fixed price. This is similar to net-bill. Instead of changing the sales order price by an amount, the price on the order is replaced by the iTPM allowance price. No iTPM KPIs are calculated for this MOP. See Admin user guide for limitations.

  > Email support@cgsquared.com **before you use this new Fixed price mop for more details on the limitations.**

- S-02184 Make the iTPM discount item off-invoice description cleaner on sales orders by removing some redundant wording and adding the allowance rate from the promotion.
- S-02186 SPLIT should populate "assigned-to" with the user that is splitting the deduction, the same way QUICK SPLIT does.
- S-02156 Convert the reports under the iTPM subtab on the sales order from using estimated quantity records to allowance records.
- S-02180 The dashboard reminder that shows which sales orders and invoices where iTPM is applying off-invoice allowances now includes sales orders where iTPM is removing allowances. (If iTPM allowances were previously applied, iTPM must first remove discounts before they can be re-applied.)
- S-02172   Update the text in the banner on sales orders when iTPM discounts are being applied. This message appears when saving a sales order, discounts have been previously applied, and the "Apply iTPM discounts" is checked.
- S-02161 The SETTLEMENT button on the deduction should not be visible unless the user's role has EDIT permission on the deduction record.
- S-02141 The VOID button on settlements should not be visible unless the user's role has EDIT rights on deduction records.
- S-02210 Add a list field of NetSuite users on the reason code record called *Approver*. You can use this field to build custom workflows for deductions based by assigning specific approvers by reason code.
- S-02160 Add two new fields to the deduction form. One field can be used to store a URL link to electronic documents, and the other field can be used to store approver notes in your custom deduction workflow: *custbodyitpm_ddn_approval_notes* and *custbody_itpm_ddn_bckup_url*
- D-01310 Remove the subsidiary filter on the assign-to field on deductions. This filter was used to shorten the drop-down list to only show NetSuite users that match the subsidiary of the deduction. Under some circumstances, this filter could cause errors splitting deductions.

1.2 What's Fixed, Improved or Removed

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

- D-01276 Deductions sometimes got stuck processing a split. There was a problem with the lines on the deduction. Deduction splits always have only two lines, but when a deduction is created from a Credit Memo, it is possible that the deduction can have more than two lines. When splitting, the deduction record is actually copied and then only the relevant fields are updated. This also means that the lines are copied. This resulted in an error. This is fixed in 19.1.1.

- S-02077 Under some circumstances, settlements can get stuck in processing status. Add new logic to prevent settlement from getting stuck.

- D-01269 The *NEW iTPM PROMOTION PLANNING* button under the planning subtab adds rows when it should not.

- S-01279 Department on the deduction doesn't flow into the settlement and populate department. As part of this story, Department was moved from the settlement lines to the settlement header.

- S-02111 Research ways to speed up the application of iTPM off-invoice allowances to sales orders and invoices. As part of this research, the buffer size of the script - *iTPM NBOI Processing   customdeploy_itpm_mr_nboi_processing* was changed to 1.

1.3 Upcoming changes

⚠️ **You are required to update to 19.1.2 on or before September 27, 2019.** Any accounts not updated by this date will be notified of when their account will be updated.

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*
19.1.x	Minor updates as needed. *i*TPM 19.1.x will be minor releases to fix critical bugs, and the addition of minor features requested by clients.
19.1.2	Fall / Winter 2019 Major release with significant enhancements After *i*TPM 19.2 is published, no bug fixes will be published to previous versions.

Enhancement candidates for 2019:

2019 'major' release enhancement candidates that are being considered:

S-02050	Period-based accruals
S-01872	Support line promotions with thousands of items. (All item promotions)
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.

*i*TPM

1.4 Known issues:

As of the release date, the following are known issues in *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, except for the NBOI script that applies off-invoice to sales orders.. Concurrency of 2 or more may result in the creation of incorrect data.

- **D-01261 A deduction created from an invoice is not correctly adjusted for the term discounts.** Workaround if your open invoices have the cash terms available: Use a credit memo, and create the deduction from the credit memo.

- 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-01253 Under some circumstances when allowances for approved, future promotions are edited, the Promotion Comparison Report KPIs aren't being updated for *Estimated Spend*. The promotion KPIs under the KPI subtab are correct. Work-around: Use the KPI Refresh button when the promotion changes from Future to Active.

- D-01254 Net Liability KPIs are correct on the promotion KPI, but not always updated on the Promotion Comparison and Detail Reports for *closed* promotions. Work-around: Set the report filter to exclude closed promotions when analyzing liability across promotions.

- S-01261 If the invoice is still within cash discount terms, then NetSuite puts discounts on the lines, which is not considered when we create the *i*TPM deduction amount.   If you have this situation, a deduction will show up in the credit memo list. Email support@cgsquared.com for steps to correct this.

- S-01981 This is only a one-time issue if you have brokers that use the Advanced Partner Center to access *i*TPM. If you have a partner management **not enabled** before 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**.

---

*i*TPM

1.5 *i*TPM Bundle Details:

For details on how to update your existing *i*TPM bundle, or install *i*TPM for the first time, go to 2.0 Installing the Bundle.

The following describes *i*TPM 'minor' Release 19.1.2.

*i*TPM Bundle Details	Release 19.1.2
Design, development, testing and publishing	March 28, 2019 - July 26, 2019
Bundle release date	July 26, 2019
Publisher ID	44277 CG Squared, Inc.
Bundle ID	Bundle #287592
NetSuite Built-for-NetSuite review?	*i*TPM 2018.2.3 was tested with Netsuite 2019.1 and received Built-for-Netsuite certification. *i*TPM 2019.1.2 will be submitted for BFN certification August 2019..
Admin tasks required AFTER installation?	**Yes**. Review and update preferences. See 2.6 Administrator tasks (First-time install or Update)

⚠️ **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: 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.

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

Perform admin tasks as outlined in 2.6 iTPM Administrator tasks (After every Install or Update)

2.0 Installing or Updating the *i*TPM Bundle

2.1 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 currently 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
- Accounting Periods

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

2.2 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. Confirm your account is not scheduled for maintenance when you want to install *i*TPM.
2. Confirm prerequisites in section 2.1.
3. 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 could install two copies of *i*TPM in your sandbox, and require a sandbox refresh to fix.**

4. Use the following information to **search** for the *i*TPM SuiteApp:
   - **Bundle Name:** *iTPM : Trade Promotion Management*   **Bundle ID:** 287592

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

   a. See section   2.3 First-time Administrator Set-up Tasks (Skip if Updating)

   b. See section   2.6 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.

ℹ️ **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.

2.3 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 2.6 for the installation.
2. Then use the *Administrator User Guide* to setup and configure *i*TPM for the first time:

Setup tasks: (Skip bolded steps if only using Deduction Management)	Status / Notes
Step 1: Setup the GL-accounts for Trade Promotion	
Step 2: **Setup off-invoice discount item & statement charge 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: Set NetSuite Accounting Preference for JE bulk approval (Optional)	
Step 13: Setup customers that apply off-invoice based on ship dates	
Step 14: Publish Dashboard Portlets and Reminders (optional)	
Step 15: Configure Event-Based Accruals (Optional)	
Step 16: Update your new Item checklist / workflow	
Step 17: Update your Month-end close checklist and reconciliation	
Step 18: TPM Cut-over date and legacy data options	
Step 19: Test your *i*TPM Setup	
Step 20: Document your transition plan for promotions / deductions	

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

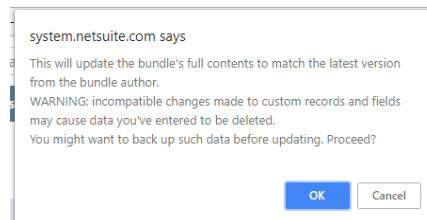7. Follow the NetSuite update steps.

   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 2.6.

*i*TPM

2.5 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.

Make sure your account is not schedule for maintenance when you are updating *i*TPM.

1. Go to Setup-> Company -> Administrative Notifications
2. Go to the *Confirmed* subtab and sort the notices so the newest notices are on the top.

Administrative Notifications

[Edit] [Back]

Options ▾	**Confirmed** ▾	Pending Confirmation		
				1
NOTIFICATION TYPE	CONFIRMED BY	DATE CONFIRMED ▾	MESSAGE TEXT	
Scheduled Maintenance	Giriesh Gunturi	3/27/2019 2:25 pm	As a courtesy, this communication is to notify you of scheduled downtime for your NetSuite account(s) during a planned maintenance window as we perform hardware maintenance.	
			Account TSTDRV1837465 is **scheduled for maintenance downtime on March 28, 2019 from 11:00 pm to 12:00 am (Eastern Daylight Time)**.	

3. Look at the list and confirm there is no maintenance or down-time scheduled. Postpone your *i*TPM update if your account is scheduled for maintenance or downtime.

⚠️ **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 2.6.**

ℹ️ **Note:** After *i*TPM is updated, sometimes we see a few script errors. That's because a script from our older managed bundle is still running or hasn't been reset. We typically only see these errors after the update and before 12 midnight on the day *i*TPM is updated. You'll see "module not found" and similar messages because the old script has been replaced by a new script in the updated managed bundle.
Email support@cgsquared.com if you observe NetSuite error messages for *i*TPM the day after *i*TPM has been updated.

2.6 *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.

Here are the admin tasks to perform after *i*TPM is installed or updated from 18.2.5 to **19.1.2**:

TASK #1: Edit your reason codes that do NOT have the subsidiary

To help prevent users from selecting invalid reason codes, and to prevent confusion, reason codes now require a subsidiary.

You must do these one-time steps to keep using deduction reason codes in *i*TPM:

If you use *i*TPM reason codes in only one subsidiary, do these steps:

1. Go to *iTPM -> Setup -> Deduction Reason Codes -> List*
2. **If all your reason codes have a subsidiary, no action is required. Skip to TASK #2**
3. EDIT every reason code that does not show a value for subsidiary.
4. SAVE
5. EDIT an open deduction and click on the reason code drop-down menu. Confirm the drop-down menu contains all the reason codes you expect.
6. SAVE the deduction to confirm you are able to save deductions that were created using your reason code that did not have subsidiary.

If you use reason codes in more than one subsidiary:

6. Do steps 1 through 5 above. Populate your reason codes with one of your subsidiaries.
7. For every deduction that you need to use in another subsidiary, also do the following:
   a. View a reason code in one subsidiary that you also need to use in another subsidiary.
   b. Use *Action -> Copy* to make a copy
   c. Change the subsidiary and click SAVE
   d. Repeat for every reason code and subsidiary as necessary

TASK #2: You need to configure iTPM to reinvoice using Statement Charges

1. **Create a non-inventory item for iTPM statement charges.** See step #? in the Admin User Guide for details. This item MUST HAVE YOUR OPEN DEDUCTION GL-ACCOUNT.
2. **EDIT your iTPM Preferences**, and select your newly created statement charge item for iTPM statement charges.
3. ADD the EDIT STATEMENT CHARGE permission to any role that manages deductions. Add VIEW to any role that needs to review settlements & deductions.

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**

TASK #3 OPTIONAL: If you use *i*TPM to apply off-invoice allowances to sales orders, change the priority of the OI NB script from standard to HIGH.

1. Go to ***Customization -> Scripting -> Script Deployments***
2. Filter the list to show type= *Map/Reduce*, Status = *Scheduled scripts*.
3. **EDIT** the script, *- iTPM - MR NBOI Processing*
4. Change Priority from STANDARD to HIGH, and click **SAVE**

TASK #4: OPTIONAL: You may need to change the following if you customized *i*TPM

- If you changed links in the *i*TPM center tab menus, you may need to edit the menu so it points to your customized form, report, and or list view.
- If you changed frequency for any *i*TPM scripts, they will revert back to the default frequency after *i*TPM is updated. Edit these scripts and change the frequency as needed.

iTPM

2.7 Suggested Sandbox Testing

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

- Test using reason codes.   If you don't see reason codes in the drop-down menu on your deduction, you may not have correctly updated your reason code with the correct subsidiary, or created a duplicate reason code with the appropriate reason code.
- While many changes in this 'minor' update are cosmetic, we still recommend clients that have sandboxes test iTPM before updating their production account.

⚠ **Note: If you installed the iTPM 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 iTPM managed bundle**.

⚠ **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.

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

⚠ **Important: You, as iTPM administrator, are responsible for testing iTPM *BEFORE*** installing iTPM 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.

3.0 Support

3.1 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.

3.2 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. Documentation also available at: www.i-TPM.com/planning-resources www.i-TPM.com/deduction-management
Email	Just email your question or issue to support@cgsquared.com.

4.0 Terms and Conditions

4.1 NetSuite Disclaimer

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

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4.2 iTPM Terms and Conditions

By installing the iTPM managed bundle, you accept your **iTPM Acceptance Form Agreement** entered into between the purchasing company ("**Customer**") and CG Squared, Inc. (**CG²**), and agree to be bound by the **iTPM 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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