

# iTPM

## 21.1.1 Update

### Spring 2021 Release Notes



BFN Certified

Revised May 8, 2021

# New Features in iTPM 21.1.1

## Deduction Management Management Enhancements

1. S-02672 New **“Non G/L Change”** button on the deduction to make changes in closed periods when the NetSuite EDIT button doesn't work.
2. S-02394 **UNDO iTPM Expense** button on a **Journal Entry** that applied to a deduction and not previously reversed.
3. S-02605 **When an iTPM journal entry is rejected, update the deduction** status and balance.
4. S-02718 **When a user DELETES a split deduction, update the parent deduction** balance and the split-off amount.
5. S-02712 **When an iTPM journal entry is DELETED, update the deduction** status and balance.
6. S-02784 Validate CSV Split reason code and reference date to **prevent deduction splits from getting stuck processing**
7. S-02819 Ability to **change the deduction customer** to the parent or child of the original deduction customer
8. S-02769 Allow a **non NetSuite Admin users can delete the original deduction** if they have deduction permission = FULL

## Promotion Planning

9. S-02610 **iTPM will check the checkbox instead of generating an error message** for the user to check *“Available for iTPM?”* when creating or editing NetSuite item groups for iTPM if any item does not have this checked.
10. S-02676 Add new saved search to the iTPM menu: **“ iTPM Promotion Comparison Detail w/units”**
11. S-02724 New reports: **“- iTPM Settlements by Deduction Report”** and **“- iTPM Settlements by Promotion Report”**
12. S-02592 New **“Back to Draft”** button on promotions allows promotions to go back to draft status (some limitations)
13. S-02763 **New Promotion Type configuration for Process Plan:** If checked, just use the first items the NetSuite item group to reduce processing time.

## Applying Off-invoice to sales orders

14. S-02553 **S-02553 Remove & apply off-invoice allowances on sales orders in less time**
15. S-02770 Checkbox **option on the customer record to skip applying iTPM off-invoice** discounts to sales orders
16. S-02675 **Skip iTPM applying discounts on sales order save if there are no overlapping promotions**

Note: Go to Technical Release notes for 21.1.1 at [www.i-TPM.com/admin-training-resources](http://www.i-TPM.com/admin-training-resources) to see a list of the over 60 changes to iTPM

# 1. New button on the deduction “Non G/L Change”

**Benefits:** Make non G/L changes to deductions in closed periods without using NetSuite EDIT.



### NON G/L CHANGES

**Submit** | **Cancel**

DEDUCTION  
- iTPM Deduction #195

REFERENCE #  
975113

REASON CODE  
Unknown

ASSIGN TO  
Alex Ring

REFERENCE DATE  
[Calendar icon]

MEMO  
test non G/L change

RESEARCH STATUS  
Other

NEXT STEPS  
[Dropdown menu]

GROUP  
Retail

EXTERNAL BACKUP URL  
[Text field]

DISPUTED?  
 CUSTOMER APPROVES REPAY?

## 2. UNDO EXPENSE button on iTPM Journal Entries.

**Benefits:** Easier way to un-do mistakes. iTPM creates a JE reversal, updates deduction open balance & status

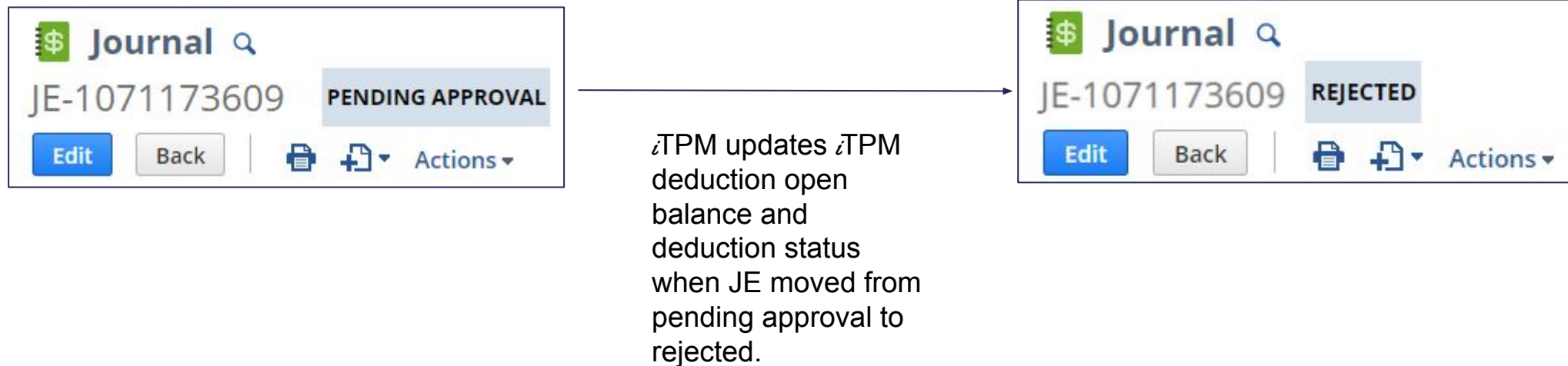
The image displays two screenshots of the iTPM Journal Entry interface. The top screenshot shows a journal entry for JOURNAL ID J0U00000786, which is 'APPROVED FOR POSTING'. The interface includes buttons for 'Edit', 'Back', and 'Undo Expense', along with a printer icon and an 'Actions' dropdown menu. Below the buttons is a 'Primary Information' section with the following details:

ENTRY NO. J0U00000786	<input checked="" type="checkbox"/> APPROVED	REVERSAL #
CURRENCY USA	DATE 9/28/2020	REVERSAL DATE
EXCHANGE RATE 1.00	POSTING PERIOD	MEMO Expense for Deduction 155

The bottom screenshot shows the same journal entry after the 'Undo Expense' button has been clicked. A new reversal entry has been created, with the 'REVERSAL #' field populated with 'J0U00000879'. The 'POSTING PERIOD' is now 'Mar 2021'. The 'MEMO' field remains 'Expense for Deduction 155'. A blue arrow points from the 'Undo Expense' button in the top screenshot to the 'REVERSAL #' field in the bottom screenshot.

### 3. iTPM updates deduction status & balance when iTPM JE is REJECTED.

**Benefits:** Easier way to reject journal entries without using the iTPM Admin tool. Updating the deduction open balance and deduction status is automatic.



**For this feature, contact your iTPM Team. A script specific to your JE workflow will be deployed.**

Note: If deduction is in a locked or closed period, "Allow non G/L changes" must be checked for that period.

## 4. DELETE a split deduction, iTPM updates the parent deduction balance, split-off amount & status

**Benefits:** Easier way to un-do deduction splits, because NetSuite admin permissions and iTPM Admin tool are no-longer needed.

**Actions -> DELETE** deduction #282, which was split from parent Deduction #280

The screenshot shows the NetSuite iTPM interface for editing a split deduction. The top navigation bar includes 'Activities', 'iTPM', 'Transactions', 'Lists', 'Reports', 'Analytics', 'Documents', 'Setup', 'Customization', 'Support', 'SuiteApps', 'Sales', and 'Knowledge Base'. The main header shows '282' and an 'OPEN' button. Below this are 'Save', 'Cancel', and 'Reset' buttons. An 'Actions' dropdown menu is open, with 'Delete' selected. The form is divided into sections: 'Primary Information' (highlighted in yellow), 'ENTRY NO.' (282), 'ITPM OTHER REFERENCE CODE' (2), 'STATUS' (Open), 'RESEARCH STATUS' (All other), 'NEXT STEPS', 'ITPM CUSTOMER' (Aaron Abbott), 'DATE' (1/5/2021), 'POSTING PERIOD' (Jan 2021), 'REFERENCE DATE' (1/25/2021), 'TRANSACTION' (Credit Memo #MEM00000245), 'ORIGINAL DEDUCTION' (- iTPM Deduction #220), 'PARENT DEDUCTION' (- iTPM Deduction #280), and 'ITPM APPLIED TO' (- iTPM Deduction #280). There are also checkboxes for 'DISPUTED?' and 'CUSTOMER APPROVES REPAY?'.

Split deduction must be in a unlocked, open NetSuite period.

Split deduction must be open with no resolutions.

Parent deduction period must have "Allow non G/L changes checked"


User role must have appropriate iTPM permissions.

iTPM automatically updates the open deduction amount, split-off amount and status of parent deduction #280.

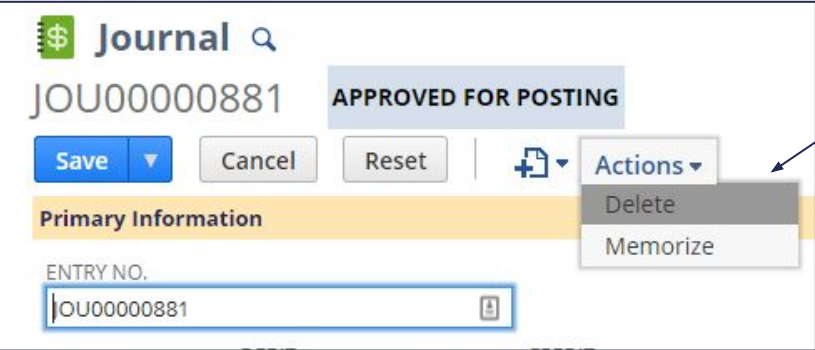


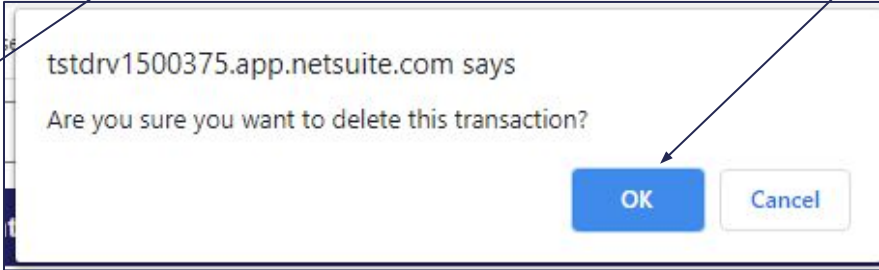
# 5. Update deduction status and balance if the iTPM journal entry is deleted

**Benefits:** The iTPM Admin tool is no longer needed if you need to delete an iTPM journal entry.

1.  - iTPM Deduction   
 272 RESOLVED   
 Edit Back Actions

Journal Entry must be in an open, un-locked period  
User role must have appropriate permissions to delete a journal entry.  
If deduction is in a locked or closed period, "Allow non G/L changes" must be checked for that period.

2.  Journal   
 JOU00000881 APPROVED FOR POSTING   
 Save Cancel Reset Actions   
 Primary Information   
 ENTRY NO.   
 JOU00000881   
 Delete   
 Memorize



tstdrv1500375.app.netsuite.com says  
Are you sure you want to delete this transaction?  
OK Cancel

3.  - iTPM Deduction   
 272 OPEN   
 Edit Back Non G/L Changes Quick Split Split (CSV) Split Re-Invoice Quick Expense Expense Settlement Actions

# 6. CSV Split Validations for reason code and reference date

**Benefits:** CSV Splits will not get stuck because a CSV file has bad data.

Split (CSV)

	A	B	C	D	E	F	G	H
1	Deduction_ID	Split_Amount	Split_Disputed?	Split_Memo	Split_ReferenceCode	Split_ReferenceDate	Split_ReasonCode	Expense?
14	- iTPM Deduction #11	654.33	NO	Testing S 0278	CSV Split Feb 3	3/24/2021		NO
15	- iTPM Deduction #11	2100	NO	Bad date	CSV Split Feb 3	13/1/2021		NO
16	- iTPM Deduction #11	5300	NO	Bad date	CSV Split Feb 3	3/33/2021		NO

**ORACLE NETSUITE**

Notice (SuiteScript)

Error: Please give Valid Date(Dont give 0 infront of Single dates and months)

[Go Back](#)

	A	B	C	D	E	F	G	H
1	Deduction_ID	Split_Amc	Split_Dis	Split_Memo	Split_ReferenceCode	Split_Referer	Split_Reas	Expense?
2	- iTPM Deduction #28	94.89	NO	Testing S 02784	CSV Split Feb 3	3/24/2021		NO
3	- iTPM Deduction #28	21.31	NO	Wrong reason code	CSV Split Feb 3	3/24/2021	Damage	NO
4	- iTPM Deduction #28	24.58	YES	Testing S 02784	CSV Split Feb 3	3/24/2021		NO
5	- iTPM Deduction #28	27.39	NO	Testing S 02784	CSV Split Feb 3	3/24/2021	Damages	YES
6	- iTPM Deduction #28	30.32	NO	Testing S 02784	CSV Split Feb 3	3/24/2021		NO
7	- iTPM Deduction #28	30.89	NO	Testing S 02784	CSV Split Feb 3	3/24/2021	Damages	NO
8	- iTPM Deduction #28	37.07	NO	Testing S 02784	CSV Split Feb 3	3/24/2021		YES
9	- iTPM Deduction #28	42.03	NO	Testing S 02784	CSV Split Feb 3	3/24/2021		NO

**ORACLE NETSUITE**

Notice (SuiteScript)

Error: Please Provide Valid ReasonCode

[Go Back](#)



## 7. Change the customer on a deduction

**Benefits:** Align the deduction to the parent or child entity that claimed the deduction.  
(Must be NetSuite Admin role or have permission = FULL for the iTPM Deduction)



The screenshot shows the top navigation bar of the iTPM Deduction interface. It includes a search icon, the text "iTPM Deduction", and a magnifying glass icon. Below this, there is a "236" and an "OPEN" button. A row of buttons follows: "Edit", "Back", "Non G/L Changes", "Quick Split", "Split (CSV)", "Split", "Re-Invoice", "Quick Expense", "Expense", "Settlement", and "Change Customer". An arrow points from the "Change Customer" button to the next screenshot.



The screenshot shows the "iTPM - Deduction Change Customer" form. It features a blue "Submit" button at the top. Below the button, the form displays the following information: "ID 35173", "DEDUCTION EXISTING CUSTOMER AB&I Holdings", and a "SELECT CUSTOMER \*" dropdown menu. The dropdown menu is open, showing two options: "AB&I Holdings" and "AB&I Holdings : Absolute Location Support".

# 8. Show the DELETE deduction when deduction permission = FULL

**Benefits:** User doesn't need to be a NetSuite admin to be able to delete a deduction created in error

- To delete a deduction, it must be an original deduction in an OPEN period with NO splits and NO resolutions.
- In an open period, if you delete all related resolutions (settlements, journal entries, statement charges), and delete all the splits, then the DELETE button will become visible on the parent deduction.

The screenshot shows the top section of a NetSuite record page for '- iTPM Deduction'. The record ID is 339 and the status is 'OPEN'. A row of buttons is visible: Edit (highlighted in blue), Back, Non G/L Changes, Quick Split, Split (CSV), Split, Re-Invoice, Quick Expense, Expense, Settlement, and Delete. An arrow points from the 'Delete' button in this interface to the 'Full' permission level in the table below.

The screenshot shows a table of permissions in NetSuite. The table has two columns: PERMISSION and LEVEL. The first row shows '- iTPM Deduction' with a 'Full' permission level. The second row shows '- iTPM Settlement' with an 'Edit' permission level. An arrow points from the 'Full' level in the first row to the 'Delete' button in the screenshot above.

PERMISSION	LEVEL
- iTPM Deduction	Full
- iTPM Settlement	Edit

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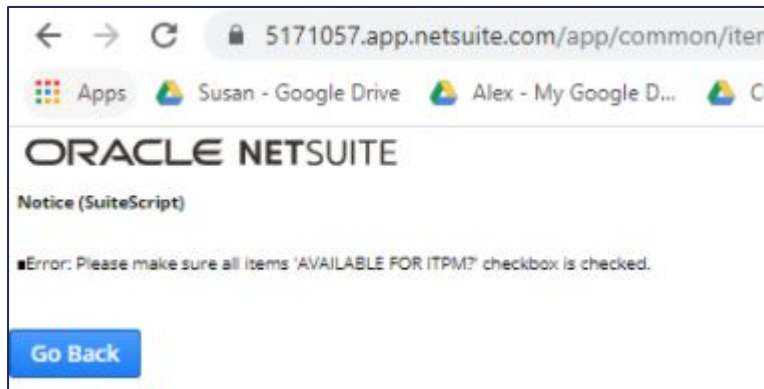
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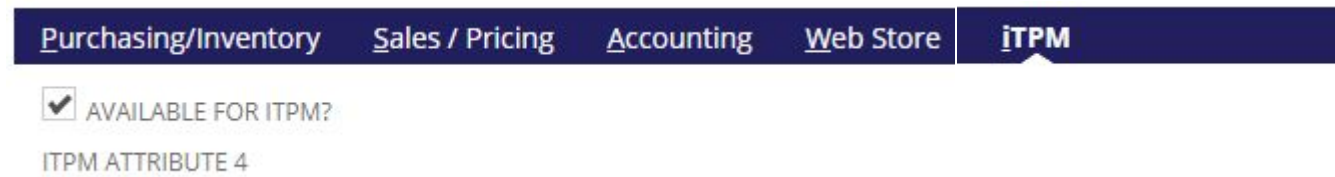
## 9. iTPM checks “Available for iTPM?” instead of generating an error message

**Benefits:** Create NetSuite item groups for iTPM in less time and effort because iTPM will automatically check the “Available for iTPM?” in any items in the group that don’t have this checked.

Instead of getting this error message....



iTPM now checks “Available for iTPM?” checkbox for your items in the group.



# 10. New saved search “ *iTPM Promotion Comparison Detail w/units*”

**Benefits:** Easier visibility to base, incremental and actual quantity in your promotion analysis and roll-ups.

*iTPM -> Promotions -> Detail Comparison w/units*

**- iTPM Promotion Comparison Detail KPIs w/units: Results** List Search Audit Trail

[Return To Criteria](#) [Edit this Search](#)

**FILTERS**

STYLE  
Normal

EDIT

1 - 4/10 TOTAL: 654

ESTIMATED SPEND : LS	ESTIMATED SPEND : BB	ESTIMATED SPEND : OI	ACTUAL SPEND : BB	ACTUAL SPEND : LS	ACTUAL SPEND : BB	ACTUAL SPEND : OI	NET LIABILITY: LS	NET LIABILITY: BB	NET LIABILITY: OI	UOM	EST BASE QTY	EST INCREMENTAL QTY	EST BASE + INCREMENTAL	ACTUAL QUANTITY
6.30	240.00	0.00	17.65	19.72	17.65	0.00	0.00	222.35	0.00	Each	14	10	24	0
20.49	780.00	0.00	57.37	64.13	57.37	0.00	0.00	722.63	0.00	Each	14	10	24	0

Each row for a customer, promotion and item now includes the volume KPIs, including Estimated Base units, Estimated Incremental units, Actual Quantity, and the UOM (unit-of-measure). Additional volume KPIs from the KPI custom record can be added to this saved search.



# 11. New report “- iTPM Settlements by Deduction Report”

**Benefits:** Easier way to get a list of settlements matched to each deduction.

## iTPM -> Resolutions -> Settlements by Deduction Report

**- iTPM Settlements by Deduction**

CG Squared (2) DEV - 20.1.2 [TSTDRV1500375]  
 CG Squared, Inc. : Honeycomb US-East  
**- iTPM Settlements by Deduction**  
**January 1, 2018 - February 13, 2021**  
 Summary of iTPM promotional settlements by deduction.

DEDUCTION & SETTLEMENT CUSTOMER	DEDUCTION #, VOIDING SETTLEMENT #, OR BLANK IF ADJUSTMENT	DEDUCTION MEMO	ITPM PROMOTION: CUSTOMER	ITPM PROMOTION TYPE	PROMOTION NUMBER	PROMOTION STATUS	ITPM PROMOTION: NAME	ITPM PROMOTION DESCRIPTION	ITPM PROMOTION: OTHER REFERENCE CODE	SETTLEMENT DATE	SETTLEMENT NUMBER	SETTLEMENT STATUS	SETTLEMENT OTHER REFERENCE CODE	SETTLEMENT MEMO	SETTLEMENT AMOUNT SANS VOIDED AND FROM OTHER CUSTOMERS	SETTLEMENT AMOUNT	ESTIMATED SPEND: PROMOTION	ITPM PROMOTION: STORED LE SPEND: PROMOTION	ITPM PROMOTION: STORED EXPECTED LIABILITY: PROMOTION	ITPM PROMOTION: STORED ACTUAL SPEND: PROMOTION
<b>AB&amp;I Holdings</b>																				
	158		AB&I Holdings	MCB (direct accounts)	817	Approved	Test promotion (accrual)	Create promotion to test accrual calculations Promotion will be \$12/case there are 12 eaches in each case... We will create a sales order for eachs... We need to confirm iTPM accrual will correctly convert the \$12/case to \$1/each for the accrual log for this promotion.		12/21/2020	45	Applied			0.66	\$30,100.00	\$1,660.00	\$1,660.00	\$0.66	
	28		AB&I Holdings	MCB (direct accounts)	817	Approved	Test promotion (accrual)	Create promotion to test accrual calculations Promotion will be \$12/case there are 12 eaches in each case... We will create a sales order for eachs... We need to confirm iTPM accrual will correctly convert the \$12/case to \$1/each for the accrual log for this promotion.		1/13/2021	46	Applied		Voiding Settlement # 28	123.45	\$30,100.00	\$1,660.00	\$1,660.00	\$0.66	
			AB&I Holdings	Scan / indirect accounts	7	Approved	Test Promotion #2 (NSTS)			8/27/2020	26	Applied		Paid by check (minus fee)	90.00	90.00	\$175.00	\$175.00	\$175.00	\$90.00
<b>Total - AB&amp;I Holdings</b>															<b>90.00</b>					
Acme	00256		Acme	Slotting / Free fill	5	Approved	Free stuff			3/17/2020	8	Applied	Example settlement adjustment	Paid by check;	9,516.23	9,516.23	\$15,700.00	\$15,700.00	\$15,003.00	\$9,516.23
<b>KeHE</b>																				
	17	Deduction success	Aaron Abbott	Scan / indirect accounts	1	Approved	Example promotion		Ref # on the the promo	7/7/2020	14	Applied		Test resolving a deduction to a different customer promotion	280.00	\$3,907.00	\$4,120.00	\$3,907.00	\$593.00	

# 11. New report “- iTPM Settlements by Promotion Report”

**Benefits:** Easier way to get a list of settlements for all your promotions.

*iTPM -> Resolutions -> Settlements by Promotion Report*

**- iTPM Settlements by Promotion**

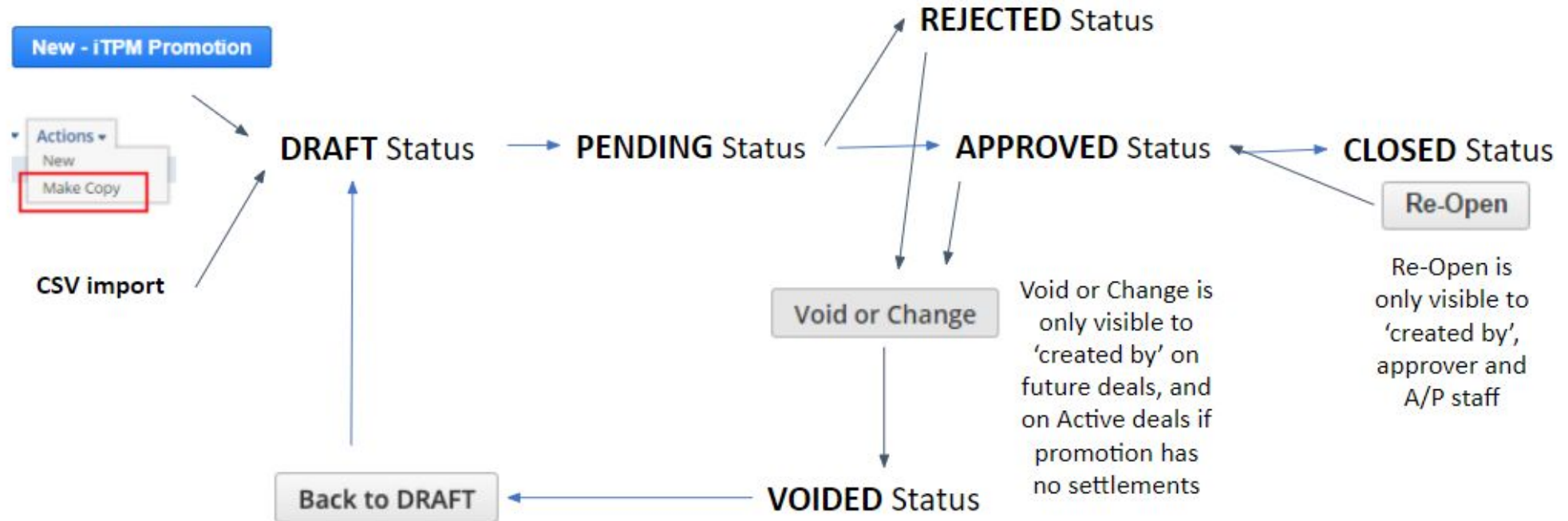
CG Squared (2) DEV - 20.1.2 [TSTDRV1500375]  
 CG Squared, Inc. : Honeycomb US-East  
**- iTPM Settlements by Promotion**  
**January 1, 2018 - March 2, 2021**

Summary of iTPM promotional settlements by promotion. Report dates should include ALL of your iTPM history to include all settlements. Use the promotion dates to limit what promotions to see on your

ITPM CUSTOMER	ITPM PROMOTION TYPE	PROMOTION STATUS	ITPM PROMOTION NAME	ITPM PROMOTION DESCRIPTION	ITPM PROMOTION OTHER REFERENCE CODE	SETTLEMENT DATE	SETTLEMENT NUMBER	SETTLEMENT STATUS	SETTLEMENT OTHER REFERENCE CODE	DEDUCTION #, VOIDING SETTLEMENT #, OR BLANK IF ADJUSTMENT	DEDUCTION MEMO	SETTLEMENT MEMO	SETTLEMENT AMOUNT SANS VOIDED AND FROM OTHER CUSTOMERS	SETTLEMENT AMOUNT	ESTIMATED SPEND : PROMOTION	ITPM PROMOTION: STORED LE SPEND : PROMOTION	ITPM PROMOTION: STORED EXPECTED LIABILITY : PROMOTION	ITPM PROMOTION: STORED ACTUAL SPEND : PROMOTION
<b>KeHE</b>																		
	Scan / indirect accounts	Approved	January event #2			7/7/2020	15	Applied		23	Memo text from the CM	Test resolving a deduction to a different customer promotion (should resolve)		25.52	\$3,907.00	\$5,157.00	\$3,907.00	\$3,641.86
	Scan / indirect accounts	Approved	January event #2			8/27/2020	25	Applied		21		Voiding Settlement # 21		34.56	\$3,907.00	\$5,157.00	\$3,907.00	\$3,641.86
	Scan / indirect accounts	Approved	January event #2			7/24/2020	23	Applied		33				400.00	\$3,907.00	\$5,157.00	\$3,907.00	\$3,641.86
<b>Total - KeHE</b>													<b>3,190.34</b>					
<b>Total - 2</b>																		
<b>5</b>																		
Acme	Slotting / Free fill	Approved	Free stuff			3/17/2020	8	Applied	Example settlement adjustment	00256		Paid by check;	9,516.23	9,516.23	\$15,700.00	\$15,700.00	\$15,003.00	\$9,516.23
<b>Total - 5</b>													<b>9,516.23</b>					

## 12. New “BACK TO DRAFT” workflow button for VOIDED promotions

**Benefits:** Fewer mouse clicks and steps to make changes to Approved promotions.



# 13. Option for Process Plan to only use first item in NetSuite item group

**Benefits:** Faster processing time, fewer data records for promotions where liability is not linked to shipments

**Additional Promo Information**

<input type="checkbox"/> SHOW ORDER DATES?	<input type="checkbox"/> BASE DEAL?
<input checked="" type="checkbox"/> SHOW PERFORMANCE DATES?	<input type="checkbox"/> REQUIRE ESTIMATED QUANTITY?
<input type="checkbox"/> SHOW AT RETAIL?	<input type="checkbox"/> PLAN INCREMENTAL SEPARATE FROM TOTAL?
<input checked="" type="checkbox"/> VALID FOR INDIRECTS?	<input type="checkbox"/> STACKABLE?
<input checked="" type="checkbox"/> ALLOW SETTLEMENTS WHEN PROMOTION IS ACTIVE?	STACKABLE WITH
<input checked="" type="checkbox"/> DO NOT UPDATE LIABILITY BASED ON ACTUALS	<input checked="" type="checkbox"/> AVAILABLE
<input type="checkbox"/> APPLY PERCENTAGE ALLOWANCES AS PERCENTAGE DISCOUNTS	<input checked="" type="checkbox"/> REQUIRE PROMOTION PERIOD SHARE
<input checked="" type="checkbox"/> ONLY CREATE KPI AND ALLOWANCE FOR THE FIRST ITEM IN ITEM GROUP?	DISCOUNT ITEM FOR OFF-INVOICE

**Planning** Allowances Estimated Quantity Retail Info KPI's Settlements

LS AMOUNT 100.00    LS ACCOUNT 4009 Sales : Trade Promotion (contra revenue)

**- iTPM Promotion Plannings • 52 Week Items • 52 Wk Items (Parent)**

VIEW: Default View - iTPM PROMOTION PLANNING

New - iTPM Promotion Planning    Attach    Customize View

EDIT	ID	ITEM ▲	ITEM DISPLAY NAME	UNIT	ADDITIONAL DISCOUNTS
Edit	iTPM_PP0001	-Brand A (7 items)		Each	No

Use this option when promotional liability is not tied to actual shipments, and the goal is to get the promotional cost the group on the NetSuite P&L.

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# 14. Remove & apply off-invoice allowances on sales orders faster.

**Benefits:** Faster turn-around re-pricing sales orders with iTPM off-invoice discounts

1.

Items Address Shipping Messages History **iTPM**

APPLY ITPM DISCOUNTS  REMOVE ITPM DISCOUNTS

ITPM DISCOUNTS APPLIED

Reprice this sales order by checking "Apply iTPM discounts"

2.

**Please wait while REMOVING iTPM discounts...**  
Please wait! iTPM is processing to remove all applied discounts of off-invoice and net-bill allowances for this Transaction. To prevent invoicing errors, wait to approve and/or fulfill this order until processing is completed. This process runs every 15 minutes.

**Sales Order**  KeHE **PENDING FULFILLMENT**

3.

**Please wait while APPLYING iTPM discounts...**  
Please wait! iTPM is processing off-invoice and net-bill allowances for this Transaction. To prevent invoicing errors, wait to approve and/or fulfill this order until processing is completed. This process runs every 15 minutes.

**Sales Order**  KeHE **PENDING FULFILLMENT**

4.

**Sales Order**  KeHE **PENDING FULFILLMENT**

Total time to Remove and then Add discounts will be reduced

# 15. Customer checkbox option to skip applying off-invoice to sales order

**Benefits:** Skip applying iTPM off-invoice discounts if the customer will never have iTPM off-invoice discounts results in the sales order being available for fulfillment after saving the sales order.

The image shows two screenshots from a software interface. The top screenshot is a 'Promotion Report' for a sales order. It displays transaction details: Sales Order #5L500000860, DATE 12/16/2020, CUSTOMER KeHE, and SHIP DATE 12/18/2020. Below this is a 'Promotions' table with two rows:

PROMOTION #	CUSTOMER	TITLE
822	KeHE	test off-invoice < \$1.00 on the sales order
824	KeHE	Test fixed price

At the bottom of the promotion report, there are two checkboxes:  USE SHIP DATE TO APPLY ITPM DISCOUNTS? and  DO NOT APPLY ITPM DISCOUNTS TO SALES ORDERS?. The second checkbox is highlighted in yellow.

The bottom screenshot is a 'Customer' profile page for 'KeHE'. It shows fields for CUSTOMER ID (KeHE), TYPE (Company), STATUS (CUSTOMER-Closed Won), ADDRESS, and a checkbox for CUSTOMER IS INACTIVE. At the bottom, there are two tabs: 'Information' and 'ITPM'. The 'ITPM' tab is selected and highlighted in blue. Under the 'ITPM' tab, there are two checkboxes:  USE SHIP DATE TO APPLY ITPM DISCOUNTS? and  DO NOT APPLY ITPM DISCOUNTS TO SALES ORDERS?. The second checkbox is highlighted in yellow. A blue arrow points from the highlighted checkbox in the top screenshot to the highlighted checkbox in the bottom screenshot.

## 16. iTPM skips (in real time) applying off-invoice if no overlapping promotions

**Benefits:** No waiting, you know when your sales order is saved that there are no iTPM discounts to apply.



The screenshot shows a software interface with a green header bar containing tabs: Items, Address, Shipping, Messages, History, iTPM, and iTPM Discounts. Below the header, there are four checkboxes with labels:  APPLY ITPM DISCOUNTS,  REMOVE ITPM DISCOUNTS,  ITPM DISCOUNTS APPLIED, and  NO OVERLAPPING PROMOTIONS / OVERRIDE. An arrow points from the text below to the checked checkbox.

Click save. If there are no overlapping promotions, this will be checked and there will be no banner *“Please wait while iTPM applies discounts”*

This will also be checked if “Do not apply iTPM off-invoice discounts to sales orders” is checked on the customer record.

# Update Schedule

The next update is tentatively scheduled for late **Summer 2021**.

iTPM Anticipated Releases	Anticipated Date Generally Available*
'Minor' Updates 21.1.x	As needed.  Release date and enhancements may change based on client needs and requests.
'Major' Release 21.2.1	Late Summer 2021.  Release date and enhancements may change based on client needs and requests.

\* Subject to change

# Summary

- Email questions and issues to [support@cgsquared.com](mailto:support@cgsquared.com)
- Updated User Guides are available online at  
[www.i-TPM.com/promotion-planning](http://www.i-TPM.com/promotion-planning)  
[www.i-TPM.com/deduction-management](http://www.i-TPM.com/deduction-management)
- Technical release notes available at [www.i-TPM.com/admin-training-resources](http://www.i-TPM.com/admin-training-resources)