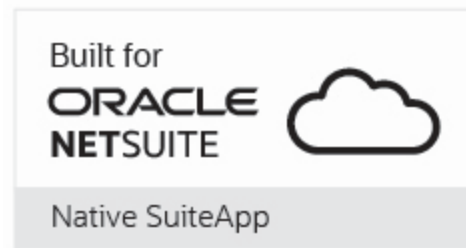


Integrated Trade Promotion Management

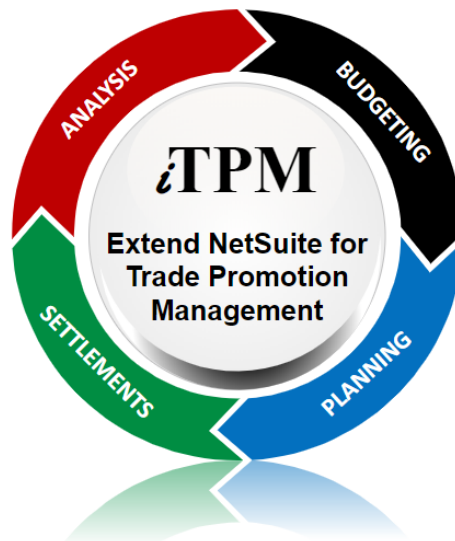


iTPM Admin Release & Install Notes

Version **21.1.1 Update**

May 4, 2021

Revised June 13, 2021



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

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Quick Reference: UPDATE iTPM 20.1.2 to 21.1.1

Use the Administrator User Guide and follow first-time tasks when installing iTPM. This check list is for UPDATING iTPM 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 iTPM using the Chrome browser.



You may be required to update to 21.1.1 before iTPM 21.1.2 is published. Any NetSuite accounts not updated by this date will be notified when their account will be updated.

Milestone	UPDATE iTPM: Tasks for the iTPM Administrator	Status / Comments
1. iTPM 21.1.1 is available.	As time allows, read Chapter 1 and Section 2.6 in these technical release notes and the <i>What's New In 21.1.1</i>	
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 your Sandbox (or Release Preview account) to update your sandbox to iTPM 21.1.1. 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 iTPM Administrator tasks (After first-time install or Update)	
4. Test!	Test iTPM. Suggested areas to include are in section 2.7 Suggested Sandbox Testing	
5. Authorize update to your production	Email CG Squared to update iTPM in production, described in 2.5 UPDATE iTPM in production	
6. Perform admin tasks in production	Perform admin tasks as described in 2.6 iTPM Administrator tasks (After first-time install or Update)	
7. Monitor	Monitor iTPM to confirm it's working as expected.	

1.0 Overview

1.1 Enhancements in iTPM 21.1.1

The following changes were made to iTPM after Nov 23, 2020 will be included in the next version of iTPM:

List begins with Agile Development iteration #138 through #162:

Note: Defects fixed start with “D”.

Notable enhancements are bolded.

- S-02628: Change text in the Quick Expense message box to include when to use the Expense button.
- S-02637 Create a warning banner on a credit memo that only shows for iTPM DDN users that don't have the “Allow non G/L changes in their role” (to prevent iTPM from creating bad data)
- S-02638 Update CSV saved imports for creating promotions
- S-02634 Added permission to iTPM roles for “- iTP Promotion Queue for Draft promotions”
- S-02627 Changed several fields to be available for EDITING to support CSV creating of promotions.
- S-02642 Add “override period restrictions” to two standard iTPM roles that manage deductions.
- D-01361 No results shown under “Related Applied Transactions” for the “- iTPM Deduction” role.
- S-02625 Format numbers in the Calendar Summary to have commas and be right justified
- S-02647 Change two saved searches so they are not available for dashboard reminders
- **D-01362** Using the RESOLVE DEDUCTIONS button in the promotion can sometimes result in a blank screen if search has too many deductions in the result-set.
- **S-02394 UNDO iTPM Expense button on a Journal Entry that applied to a deduction and not previously reversed.**
- S-02652 Add TYPE field to the iTPM custom saved list view of items
- S-02643 Add three columns to the Promotion Report under the iTPM_Discounts subtab on sales orders.
- S-02655 Change deduction sublist name from “Splits of parent deduction” to “Splits of this deduction”
- S-02656 New fields added to the settlement form to show requested settlements. These are settlements in the Settlement Queue put there when using the Resolve Deductions button on a promotion.
- S-02662 If a Journal Entry is in a period where transactions are locked or the period is closed, and “Allow non G/L changes” is NOT checked, give the user a pop-up ‘error’ message instead of a blank screen.
- **S-02553 Remove & apply off-invoice allowances on sales orders in less time by doing both in the same map-reduce process. (~30 minutes reduced to ~15 minute cycle)**
- S-02668 Prevent duplicate data creation before actually creating the deduction from the credit memo if the user has the credit memo open in two separate browser tabs.

- S-02669 See S-02665
- **S-02670 Prevent iTPM from creating bad data if any part of an account period is locked. (Same validations for CLOSED periods, but now applied if A/P, A/R or “All transactions” are just locked.)**
- **S-02605 Update the deduction status and balance when a journal entry is rejected.**
- **S-02672 New button on the deduction “Non G/L Change” to allow users to make changes to deductions in closed periods when other custom NetSuite scripts might prevent changes using the NetSuite EDIT button.**
- S-02701 Add based and incremental columns to the iTPM comparison Detail report.
- S-02696 Update the deduction status and balance when a rejected JE is resubmitted (Similar but different use-case to S-02605)
- S-02695 Prevent Netsuite & iTPM admin users from voiding approved promotions that have settlements.
- S-02702 Change the text in a pop-up message. When editing deductions in closed periods, users are prompted to use the new “Non G/L changes button.”
- S-02676 Add option to Promotion Summary Calendar to use either Ship Dates or Performance dates.
- S-02704 Add the JE amount into the memo lines of the JE created by iTPM.
- S-02705 Add the new “- iTPM Settlements by Promotion” report in the iTPM Menu
- S-02714 Add a checkbox for “All promotion statuses” for the Calendar Summary and Detail” reports.
- S-02715 Add the Calendar name in the report header.
- S-02676 Add new saved search to the iTPM menu: “ iTPM Promotion Comparison Detail w/units”
- S-02610 When creating or editing NetSuite item groups for iTPM, if “Available for iTPM?” is not checked, iTPM will check the checkbox instead of generating an error message for the user to check it.
- **S-02718 Automatically update the parent deduction balance and the split-off amount if a user deletes a deduction using the NetSuite Action -> Delete on the split deduction.**
- **D-01366** Under some circumstances, the iTPM Quick Split does not honor the iTPM preference setting to remove customer from the split-off deduction lines.
- **S-02712 Update the deduction status and balance if the iTPM journal entry is deleted.**
- S-02724 New report added to the iTPM menu: “- iTPM Settlements by Deduction Report”
- S-02723 Text added to the iTPM Preferences form to let users know that the “remove customer from split deductions” is applied to all subsidiaries.
- **S-02749 Update the deduction status and balance if the iTPM settlement is deleted. (some restrictions apply)**
- S-02754 Fix issue with *iTPM*-> *Help* URL to on-line user guides. Issue introduced by NetSuite 2021.1.
- S-02742 Add a new saved search field to the iTPM deduction form that shows the total of Statement Charges applied to the deduction.

- S-02757 Change some script names for consistency with script naming
- **D-01369** Fix issue that generated an error message when viewing the Promotion Report under the iTPM_Discounts subtab on a sales order.
- **S-02743 Allow users to delete an open deduction with no resolutions or splits if their ‘- iTPM Deduction Permission’ custom record permission = “Full”, in addition to the other requirements for Delete. (Previously only an Netsuite Admin user could delete a deduction.)**
- S-02758 Remove the restriction on the deduction follow-up date when using Quick Spit by defaulting Follow-up date to today’s date.
- S-02752 Move two Assigned-to dates under the System Information tab to save room on the deduction form to reduce the need to scroll up and down.
- **D-01368** Editing and saving a deduction does not honor the “Remove Customer from Split deduction” checkbox in iTPM promotion preference.
- **S-02766 Update the deduction status and open balance if a statement charge is deleted.**
- S-02746 Remove the restriction on the deduction follow-up date, which requires the follow-up date to be equal to or after today’s date when splitting a deduction.
- S-02758 Add a new validation to prevent a reason code from using the open deduction GL account, or the iTPM settlement GL account.
- **S-02776 Allow a Settlement in an open period to be deleted when it is in processing status, and update the deduction balance and status.**
- S-02785 Calculate and update allocation factors for draft promotions so lump-sum will be included in NetSuite workbooks for draft promotions.
- S-02777 Find and fix anything in ITPM that doesn’t conform to the upcoming NetSuite HTML and JavaScript Restriction for Search Formulas. NetSuite requires this be addressed before June 2021.
- S-02789 Editing and saving a draft promotion should trigger a KPI refresh in the draft promotion queue.
- **S-02770 Create a new checkbox on the customer record, and skip applying off-invoice to sales orders for this customer if this new checkbox is checked.**
- S-02616 Skip inactive items when allocating settlements to items in a promotion. This will prevent settlements from getting stuck when one or more items are marked as inactive after the promotion is created.
- **S-02787 Add the new checkbox selection to the top of the reports under the iTPM_Discounts subtab on the sales order. This provides a quick way to see if iTPM will apply off-invoice discounts to a sales order.**
- **S-02784 Add two additional validations to CSV splits to prevent them from getting stuck: Confirm the reason code and reference dates are valid.**
- S-02779 Add a warning banner when a user edits a settlement.

- S-02780 Add a warning banner when a user edits journal entries created by iTPM.
- **S-02592 Develop a “Back to Draft” button workflow for promotions for approved promotions (some limitations)**
- **S-02763: New promotion Type configuration for Process Plan: If checked, just use the first item in the NetSuite item group to reduce processing time and data records.**
- S-02794 Add iTPM Customer to the subtabs on the Overlapping Promotions subtab on promotions.
- S-02811 Delete existing data so new Period Share data can be created when the Back to Draft button is used.
- S-0756 When using the SPLIT button on deductions, create a pop-up for zero amount deduction lines so users don't lose the data they entered if they enter a zero row.
- **S-02819 Allow Admin users to change the iTPM deduction customer to the parent or child of the original deduction customer**
- **S-02820 The KPI Refresh (draft) queue should also include promotions Pending Approval**
- **S-02824 When applying off-invoice to sales orders, in real time skip OI processing if no overlapping deal at the time the order is saved.**
- S-02823 When applying off-invoice to sales orders, the NBOI script should skip any invoice that is paid-in-full status.
- S-02827 If the customer record has “Do not apply iTPM Discounts” checked, the NBOI script should check the “No overlapping discounts / override” on the sales order.
- S-02813 The Process Plan process should skip items that are inactive.
- S-02826 Change script to delete inactive period and item period share records instead of marking them inactive.
- S-02800 Create a new iTPM example role, “- iTPM Customer Service”
- S-02835 Add iTPM center tab type = “Support Center” to support a new iTPM example role, “iTPM Customer Service”
- S-02831 Hide these iTPM custom records from the global search: iTPM Accrual setup, and iTPM Discount Logs, iTPM Discount Log Lines.

The following stories were included after May 4, 2021 21.1.1 version:

- S-02842 Add invoice as a column to the accrual log list.
- S-02867 Remove base and estimated quantity from the old Promotion Comparison reports as they create duplicates in the result set. These measures are included in the new KPI-based reports
- S-02858 Change “iTPM Settlements Requests” (an unused saved search) unavailable for reminders.
- S-02877 Add two new User Guide selections to the iTPM Help Menu: iTPM Analytics and iTPM Apply Off-invoice
- S-02869 Add promotion # to the resolution queue list view
- S-02896 New checkbox on the sales order: “Skip fixed-price discounts to this sales order”
- S-02838 Show a yellow warning banner on credit memos that are used to create a deduction if the deduction amount doesn’t match the credit memo amount.
- S-02888 Show the customer address on the form used to change the deduction customer.

1.2 Upcoming changes



You may be required to update to 21.1.1 on or before iTPM version 21.1.2 is published.
Any accounts not updated by this date may be notified of when their account will be updated.

Release Schedule:

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

iTPM Anticipated Releases	Anticipated Date Generally Available*
21.1.x	Minor updates as needed. iTPM 21.1.x will be minor releases to fix critical bugs, and the addition of minor features requested by clients.
21.2.x	Summer 2021 Major release with significant enhancements After iTPM 21.2.x is published, no bug fixes will be published to previous versions.

1.3 Known issues:

As of the release date, the following are known issues in iTPM releases**:

- **DO NOT change the concurrency of any iTPM scheduled scripts** without first consulting CG Squared. Script concurrency should be 1 for all iTPM 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-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-01981 This is only a one-time issue if you have brokers that use the Advanced Partner Center to access iTPM. If you have a partner management **not enabled** before you update or install iTPM, 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 iTPM again**.

Saved - iTPM Promotion Search
- iTPM Partner Promotion List

Save | Reset | Cancel | Preview | New Template | Change ID | Actions

SEARCH TITLE *
- iTPM Partner Promotion List

ID
customsearch_is_itpm_partnerpromotions

OWNER *
Ring, Alex

PUBLIC
 AVAILABLE AS LIST VIEW

AVAILABLE AS DASHBOARD VIEW
 AVAILABLE AS SUBLIST VIEW
 AVAILABLE FOR REMINDERS
 SHOW IN MENU

Criteria | Results | Highlighting | Available Filters | Audience | Roles | Email | Audit Trail | Execution Log

USE EXPRESSIONS

FILTER *	DESCRIPTION *	FORM
Customer : Broker/Partner	Is any of me, my team	

✓ Add | ✗ Cancel | + Insert | Remove

1.4 iTPM Bundle Details:

For details on how to update your existing iTPM bundle, or install iTPM for the first time, go to [2.0 Installing the Bundle](#).

The following describes iTPM Release 21.1.1.

iTPM Bundle Details	Release 21.1.1
Design, development, testing and publishing	November 23, 2020 - May 4, 2021
Bundle release date	Latest release is May 4, 2021
Publisher ID	44277 CG Squared, Inc.
Bundle ID	Bundle #312604
NetSuite Built-for-NetSuite review?	iTPM 20.1.2 was tested with Netsuite 2021.1 and received Built-for-Netsuite certification.
Admin tasks required AFTER installation?	Only client specific customizations. Review and update preferences. See 2.6 Administrator tasks (First-time install or Update)



IMPORTANT: DO NOT UNINSTALL iTPM from your live production account.

Doing so after go-live will result in the loss of iTPM data, including all promotional data and custom transaction records that resolve your short-pays.



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



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

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

2.0 Installing or Updating the iTPM Bundle

2.1 Prerequisites to first-time installation

Skip this section if you have already installed iTPM and you are just updating iTPM.



Note: iTPM requires all of these prerequisites to work properly in your NetSuite accounts.



Sandbox and Release Preview Accounts:

- Only Administrators can install the iTPM managed bundle in sandboxes and release preview accounts. The user that installs iTPM is the 'owner' of iTPM.



Production:

- Only Administrators can do the first-time install of iTPM.
- CG Squared must push iTPM updates to production accounts. After testing the new version in your sandbox, email support@cgsquared.com to request an update to iTPM in your production account.



Note: If you use custom segments, email support@cgsquared.com to discuss customizing some iTPM forms and/or creating some scripts and configurations.

Before you install the iTPM SuiteApp, these features must be enabled:

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



Helpful Hint: If all journal entries must be approved, check this accounting preference:

Setup -> Accounting -> Accounting Preferences

Under the **General** subtab, if "Require Approvals on Journal Entries" is checked, you MUST also check "Allow user events on bulk journal approval" just below it.

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 iTPM.
2. Confirm prerequisites in [section 2.1](#).
3. Go to **Customization > SuiteBundler > Search & Install Bundles** to install the iTPM SuiteApp.



IMPORTANT: Do NOT use the Install process to UPDATE iTPM in your SANDBOX if iTPM is already installed in your sandbox. UPDATE, don't install. Installing could install two copies of iTPM in your sandbox, and require a sandbox refresh to fix.

4. Use the following information to **search** for the iTPM SuiteApp:
 - **Bundle Name:** *iTPM : Trade Promotion Management* **Bundle ID:** 312604

Search & Install Bundles

[Search](#)

Basic | [Advanced](#)

LEAVE THE KEYWORDS BOX BLANK AND CLICK SEARCH TO VIEW THE MOST POPULAR SUITEAPPS

KEYWORDS

[Installation Terms of Service](#)

NAME	BUNDLE ID	VERSION	MANAGED	COMPANY NAME	PUBLISHER ID	CREATED ON	AVAILABILITY
iTPM : Trade Promotion Management	312604	20.1.2	Yes	CG Squared, Inc. - 0 - TSTDRV1500358		26-DEC-19	Shared

5. Click on the ***iTPM : Trade Promotion Management*** link
6. Click the **INSTALL** button.
7. Click the **INSTALL BUNDLE** button and follow directions. (Click OK to install the bundle).
8. After iTPM 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 iTPM in your SANDBOX and/or Release Preview 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.



Note: If the Install button is NOT available:

- The iTPM SuiteApp may not have been shared with your account. To get access to iTPM, contact the iTPM Help Desk at support@cgsquared.com.

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



Important: You, as iTPM administrator, are responsible for setting up preferences, NetSuite settings, and performing 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.


Use Chapter 4 in the *Administrator User Guide* to setup and configure iTPM 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 iTPM 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 iTPM allowances	
Step 8: Create NetSuite Item Groups for Allowances (optional)	
Step 9: Set the Default Sales Order Status	
Step 10: Setup iTPM 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: Dashboard Portlets, Workbooks 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 iTPM Setup	
Step 20: Document your transition plan for promotions / deductions	

2.4 UPDATE iTPM 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 iTPM SuiteApp,

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

ACTION	NAME	BUNDLE ID	VERSION	MANAGED
	iTPM : Trade Promotion Management	312604	20.1.2 	Yes

Update Available

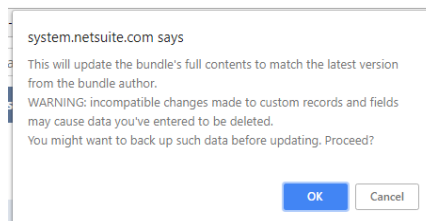
Version 21.1.1 has been released

=

7. Follow the NetSuite update steps.
 - a. Click UPDATE BUNDLE.

Preview Bundle Update

- b. Click OK.



- c. Click REFRESH to see the status of the iTPM update.

Installed Bundles

|

After iTPM is updated, **be sure to perform ALL [administrator tasks](#) listed in section 2.6.**

2.5 UPDATE iTPM in production

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

Make sure your account is not scheduled for maintenance when you are updating iTPM.

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

NOTIFICATION TYPE	CONFIRMED BY	DATE CONFIRMED	MESSAGE TEXT
Scheduled Maintenance	Girish 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 iTPM update if your account is scheduled for maintenance or downtime.



IMPORTANT: DO NOT UNINSTALL iTPM from your live production account.

Doing so after go-live will result in the loss of iTPM data, including all promotional data and custom transaction records that resolve your short-pays.



IMPORTANT: UPDATE iTPM in your SANDBOX and/or Release Preview account for testing BEFORE UPDATING iTPM in your live production account. While iTPM 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 iTPM 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 iTPM 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 iTPM has been updated.
3. **After the update is done, review and perform the [administrator tasks](#) listed in section 2.6.**



Note: After iTPM 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 iTPM 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 iTPM the day after iTPM has been updated.

2.6 iTPM Administrator tasks (After every Install or Update)



Important: If you skipped any iTPM 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 versions of iTPM. 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 iTPM is updated, contact support@cgsquared.com.

TASK #1: OPTIONAL: Make these changes if you want your users to have access to these deduction buttons:

- Add FULL permission to the deduction permission custom record =FULL for any user that needs access to the CHANGE CUSTOMER button. (You can keep the deduction transaction record permission = EDIT)
- DELETE button on deductions needs JE=Full permission.

TASK #2: Review schedule and unscheduled MapReduce scripts for your organization:

- If iTPM applies discounts to your sales orders, you'll need to also schedule the Remove NBOI script.
 - You may also need to make the “**No overlapping promotions/override**” checkbox visible in your sales order form.
 - You may need to make the “**Do not apply iTPM discounts**” checkbox visible in your customer record.
- IF your organization uses KPIs by period, review the period share MR script schedules. (See Admin User Guide for more details)

TASK #3: OPTIONAL: Add permission for the Calendar Summary custom record to use roles that use the promotion calendars.

TASK #4: OPTIONAL: You may need to change the following if you customized iTPM

- If you changed links in the iTPM 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 iTPM scripts, they may revert back to the default frequency after iTPM is updated. Edit these scripts and change the frequency as needed.

2.7 Suggested Sandbox Testing

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

- We 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.



Helpful hints for testing in Release Preview Accounts: Schedule scripts do not run in release preview accounts. To run iTPM scheduled scripts manually, go to section 6.9 in the Admin User Guide.

3.0 Support

3.1 Troubleshooting

Email your issues to support@cgsquared.com.

Please include the following in your email to iTPM support:

- Your name, your NetSuite role, and the sandbox or account with the issue.
- Describe the issue.
- If appropriate, describe 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**.

