Integrated Trade Promotion Management

Built for
ORACLE
NETSUITE

Native SuiteApp
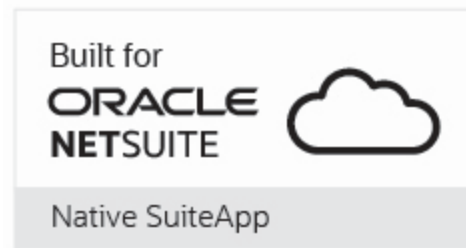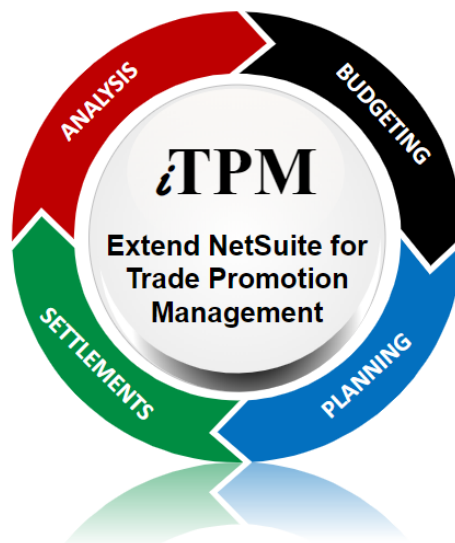
*i*TPM Admin Release & Install Notes

Version 21.2.1 Update

September 10, 2021

Revised Nov 15, 2021

*i*TPM

Extend NetSuite for Trade Promotion Management

ANALYSIS · BUDGETING · PLANNING · SETTLEMENTS

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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 20.1.2 or 21.1.1 to 21.2.1

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

Milestone	UPDATE *i*TPM: Tasks for the *i*TPM Administrator	Status / Comments
1. *i*TPM 21.2.1 is available.	As time allows, **read Chapter 1 and Section 2.6** in these technical release notes and the *What's New In 21.2.1*	
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 *i*TPM 21.2.1. 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 *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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21.2.1 Update Quick Reference

*i*TPM

1.0 Overview

1.1 Enhancements in *i*TPM 21.2.1

The following changes were made to iTPM after July 24, 2021 and are included in iTPM version 21.2.1.

- *i*TPM 21.1.1 was tested with NetSuite 2021.2, and was re-certified as Build-for-NetSuite
- This list begins with Agile Development iteration #161 through #190:
- Defect tickets start with "**D**". Enhancement tickets start with an "**S**"

Notable enhancements are bolded.

- S-02888 Show the customer address on the form used to change the deduction customer.

- S-02905 Saved searches under the promotion accrual subtab should not show inactive records

- S-02908 Remove "Override Period Restrictions" from the standard iTPM settlement and deduction example roles.

- S-02911: Editing the allowance record or the estimated quantity record in a draft promotion should trigger a KPI Refresh.

- **S-02916: Create a 'correcting' script that can be run weekends make sure the total of all the accrual records equals the current net liability of every promotion.**

- **S-02917: Promotion overpays should not make the accrual log net liability balance go down.**

- D-01375: Fixed an issue where some users were unable to create a Spend Adjustment.

- D-02932: Add three new selections to the deduction Next Steps menu.

- S-02871: Allow access to the DELETE button on a deduction if the custom record "- iTPM Deduction Permission" permission = FULL. (Same access as now when journal entry permission = Full.)

- **S-02830: If a promotion type has a specific NetSuite discount item specified, iTPM will use it to apply iTPM discounts to the sales order. If the promotion type does not have a discount item associated with it, then iTPM will use the default discount item saved in iTPM preferences for that subsidiary, just as it had prior to this enhancement.**

- **S-02910: When applying off-invoice to sales orders, check the "no overlapping promotions/override" checkbox when processing is done if there are overlapping promotions but no matching allowances. This will be done in real time when the sales order is saved, same as the overrides and search for overlapping promotions.**

- S-02899: Make the "Non G/L Changes" button available for RESOLVED status deductions for roles where the deduction record permission = FULL.

- S-02434: Make changes to the Process Plan script so it doesn't show FAILED status when there are no promotions to process.

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- D-01376: Under some circumstances, promotions could get stuck on Process Plan.

- S-02925: When VOIDING a promotion, update Net Liability to a zero balance in the accrual log.

- S-02918: Show a reminder banner on the promotion type if it is not configured to write to the accrual log.

- S-02945: When the EDIT link is clicked next to a Planning Record under the Planning subtab on a promotion, the Processing Status should revert to "NO" so the user is forced to do Process Plan.

- **S-02788: Enable iTPM to apply off-invoice discounts to sales orders that are copied. Previous to this enhancement iTPM would get 'stuck' removing iTPM discounts from copied sales orders that had iTPM discounts previously applied.**

- S-02873: If the iTPM allowance is negative, apply as an upcharge to the sales order. Change the iTPM discount line description from 'Promotion' to 'Upcharge'. Note: Negative allowances can only be created by CSV import and/or iTPM Connector. Negative allowances can not be created through the browser.

- S-02960: In the unusual situation where the approved promotion was made inactive, but the allowance records were still active, iTPM was applying these off-invoice discounts to sales orders. With this change, OI allowances are not applied if the promotion header is inactive.

- S-02898: When a user voids a promotion and uses Back-to-Draft, instead of immediately forcing the Process Plan, Back-to-Draft will not change the planning record processing status to "no", so the user can decide when to run Process Plan.

- S-02961: iTPM should not revert the item price on a sales order when the item's price bracket changes after iTPM discounts are applied but before the sales order is repriced. (Also S-02939)

- S-02949: If the user's role has FULL for the deduction record permission, show the DELETE button on SPLIT deductions the same way we do now on the original deduction. Deductions can not be in a closed or locked period, and can not have any resolutions.

- S-02952: Prevent the Process Plan from getting stuck when there are no planning records or the promotion is in a status the process plan does not process.

- S-02861: Show a pop-up message if a user tries to void a settlement that contains an inactive item.

- **S-02969: Prevent users from creating bad data if a deduction is open in multiple browser tabs, resulting in the deduction status and open balance being different from the deduction the user is viewing.**

- D-01377: iTPM incorrectly tells users managing deductions that their role is missing the "allow non G/L changes", when that permission was actually in their role.

- S-02970: Do not update the deduction status, balance, etc. if the Settlement or journal entry delete was attempted, but not successful.

- S-02978: Do validation after the UNDO button is clicked on a journal entry to prevent bad data if the JE is open in two browser tabs and was already reversed.

- S-02969: Implement validations for three more use-cases for the deduction buttons to prevent users from creating bad data if they view and act on the same open deduction in multiple browser tabs.

- S-02963 All KPIs should use Actual QTY UOM, and convert the Allowance UOM for calculation

- S-02982 Change the "- iTPM Deduction Pending Status" saved search to only show the positive amounts, not one line for credits and one for debits.

- S-02971 Update the settlement status and deduction when the voiding settlement is deleted.

- S-02989 Prevent deductions from getting stuck and give users a warning when their CSV split file contains fractions instead of dollars and cents.

- S-02985 In some situations, iTPM did not convert the fulfilment quantity to iTPM allowance UOM.

- S-02997 Move the *requested amount* fields on the settlement form to align with the other corresponding MOP fields.

- S-02988 Add a grand total on the "Splits of this Deduction" saved search on the deduction.

- S-02996 The "Stackable With" field should not be visible on the promotion form.

- **S-20967   Develop a new Deduction Approval workflow for roles that don't manage deductions. Create a new example iTPM role, '- iTPM Deduction Approver', and custom record for this permission, '- iTPM Deduction Approval by Sales'.**

- S-03004 A permission to edit Journal Entries should not be required to see the "non G/L Changes" button when viewing an open deduction if the user has EDIT permissions for deductions.

- **S-03002 Create an easy way to mass-update the non G/L change attributes of many deductions. The new form is accessed at *iTPM-> Deductions -> iTPM Mass Update Deductions New.* Users set** a filter to see a list of deductions, enter the changes they want to make, and check the deductions they want to change. The changes are put into a queue, which can be viewed using ***iTPM-> Deductions -> Mass Update Queue***

- S-03006 When deleting an iTPM journal entry, statement charge, or settlement, do not allow bad data in the JE, SC or settlement to allow the open deduction balance to be greater than the amount of the deduction.

- S-03019 The new deduction approver buttons will not be used by a NetSuite admin, and therefore should not be visible in that role.

- D-01379 If you delete a journal entry that's already been reversed, the deduction open balance is already correct and should not be updated by deleting the journal entry. (When deleting a JE that's been reversed, NetSuite deletes both the JE and the JE reversal.)

- S-03022 Create a parameter in the Suitelet script to store the sales order price report to enter the custom requested price fieldname.

- D-01381 Non G/L Change does not work for resolved deductions

- S-03012 Add journal reversal date to the report *iTPM -> Resolutions - Journal Entries*

- S-03028 If user doesn't have permission to use the Deduction Mass Update, feature, pop up a message telling user to contact their administrator

- **S-02964 Create a new report under the iTPM_Discounts subtab to compare the sales order price, EDI requested price from the customer, and what the dead-net price would be if iTPM applied off-invoice discounts to the sales order. This report has one line for each item in the sales order.**

- S-03015 Add new column, ALLOWANCE TYPE to the Off-invoice Discounts report on the sales order.

- S-03017 To use the UNDO button on a JE, a user must have EDIT or higher permission on the *Journal Entry Approval* permission. If the user doesn't have that permission, give the user a message.

- S-03019 The NetSuite Admin role should not see the new workflow buttons created for the new Deduction Approver role and associated permission.

- S-03025 Mass Deduction Update, don't allow a record to be created if the user doesn't select any fields to be changed.

- S-03026 Add a new column on the Sales Order vs EDI vs iTPM Report so users can identify items where there are overlapping fixed-price allowances. (*i*TPM 21.2.1 and older does not support this)

- S-03029 Change the "Disputed" and "Customer agrees to repay" checkboxes to drop-down menus in the Mass Deduction Update filter.

- S-03033 Create a new permission record to separate the permission for the "Change Customer" button and the "Delete" button on deductions.

  The changes below were published after Sept 10, 2021:

- D-01383: Separate the 'delete a deduction' and 'Change Customer' permissions by creating a seperate permission for change customer: The new permission is '- iTPM Change Customer' permission.

- **S-03057:   Create an overnight script that updates allowances in promotions when new items are added to the NetSuite item group**

- S-03046:   When creating a new promotion, iTPM defaults the price level to the level stored in the customer record. If this is blank, use the default price level in the iTPM preferences.

- **S-03065 When a new item is added to a NetSuite item group, create an overnight script that will automatically update active and future promotions that have that NetSuite item group.**

- S-03068 Create a separate permission specifically for the CHANGE CUSTOMER button on deductions.

- S-03072 Hide some fields on the promotion type form that are not used in iTPM 21.2.1

- S-03075: Make it easier to test and configure the new Deduction Approver role in client sandboxes. Only show the Deduction Approver buttons on a deduction is the "- iTPM Deduction Approver" custom record permission is equal to CREATE, and don't show it if it is higher than CREATE.

- S-03067: Add a new column to the new Sales Order price report to show the item's price based on the price bracket in the sales order.

- D-01382: The Expected price column in the new Sales Order EDI report is not correct.

- D-01385: The calendar summary report needs to support DD/MM/YYYY dates for customers in Australia

and other countries that use that date localization format.

- **S-03048 Create 5 approval thresholds for promotions based on estimated spending, (L1 through L5) where FULL permission can approve promotions created by the user, EDIT allows user to approve back-dated promotions, and CREATE allows user to approve/reject FUTURE promotions that are not back-dated and not owned by the user.**

- S-03056: Create pagination for the new Sales order report to get around the "Script Execution usage Limit Exceeded" governance limitation.

- S-03076: Include the net-bill method-of-payment to the Sales-Order EDI report.

- S-03059: Add an option for the Mass-Promotion copy form to change the owner of the copied promotions to the user copying the promotion, or do not change the promotion owner when copying the promotion.

- S-03079: Change the permission requirement to see the deduction button on a credit memo, reduce the journal entry permission from create to view.

- S-03066: Create a new report link on the sales order that shows which bill-back promotions overlap the sales order.

- S-03062:   Add customer to the filter in Promotion Comparison Summary and Promotion Comparison Detail reports.

- S-03080: Add unit of measure to the Sales-last-52 week saved searches under the Planning subtab on the promotion.

- S-03086: Make iTPM Admin tools available for the iTPM Support role, not just the NetSuite Admin role.

- S-03091: For first-time users, set the promotion list default view to "- iTPM Promotions"

    The changes below were published after October 22, 2021:

- S-03092: **Mass Promotion Copy form: Give users the option to be the owner of the newly created promotions, or retain the owner of the promotion being copied.**

- S-03097 Default the subsidiary in the Mass Deduction Change form to the user's subsidiary.

- S-03095 The Non G/L change form now shows the deduction amount, customer name, and reference #.

- S-03094: Create new example promotion approver roles.

iTPM Example Role	Description
- iTPM Planner & Standard Approver	This was the "- iTPM Promotion Approver" role in previous versions. This updated role includes promotion planning, and the ability to approve other people's future promotions.
- iTPM Planner & Approve (+backdated)	This new role can plan promotions, and approve other people's promotions, even if they are back-dated.
- iTPM Planner & Approve ALL	This new role can plan promotions, and can approve anybody's promotions, including ones created by them.

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- S-03100: Develop a new admin tool to populate the "iTPM Applied to" field on credit memos. Sometimes missing permissions in roles prevents iTPM from updating this field. No bad data is created, but some of the reconciliation saved searches will identify these credit memos as duplicates, when in fact they are not.

- D-01386 EDIT and SAVE of a promotion does not always trigger a KPI refresh for *approved* and *pending approval* promotions.

- D-01387 Process Plan does not always correctly default the item's base price for calculating impact price when the promotion's selected price level price is zero.

- S-03119 Create a new iTPM Admin tool to fix sales orders that get stuck processing off-invoice allowances.   Any iTPM discounts applied to the sales order must be manually removed prior to using this admin tool. (This tool will be used by iTPM support staff.)

- S-03109 On the deduction Non G/L Change form, give users an easy way to add a user note to the deduction when making other non G/L changes.

- S-03128 When creating a settlement from a deduction, add promotion KPIs to the list of deductions to help users select the correct promotion. (Actual Spending, Expected Spending, and Net Liability)

- S-03126 For users that can edit promotions, allow users to change the customer in DRAFT promotions.

- S-03118 Update the iTPM Impact price field on the allowance record after saving the record and/or changing the item's price level.

- S-03130 Allow users to mass assign deductions based on the sales-manager field in the customer record in the Mass Deduction Change form. If the sales-manager field is blank or invalid, the deduction is not re-assigned.

- S-03129 Allow users to assign deductions based on the sales-manager field in the customer record in the Non G/L form.   If the sales-manager field is blank or invalid, the deduction is not re-assigned.

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1.2 Upcoming changes

> ⚠️ **You may be required to update to 21.2.1 on or before *i*TPM version 21.2.2 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 *i*TPM versions.   * Release dates subject to change.

*i*TPM Anticipated Releases	Anticipated Date Generally Available*
22.2.x	Minor updates as needed. *i*TPM 21.2.x will be minor releases to fix critical bugs, and the addition of minor features requested by clients.
22.1.x	Winter 2022 Major release with significant enhancements After *i*TPM 22.1.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 *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.

- 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**.

1.4 *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 Release 21.2.1.

*i*TPM Bundle Details	Release 21.2.1
Design, development, testing and publishing	September 10, 2021 - October 19, 2021
Bundle release date	Latest release is October 19, 2021
Publisher ID	44277 CG Squared, Inc.
Bundle ID	Bundle #**312604**
NetSuite Built-for-NetSuite review?	*i*TPM 21.1.1 was tested with Netsuite 2021.2 and received Built-for-Netsuite certification.
Admin tasks required AFTER installation?	See 2.6 Administrator tasks (First-time install or Update) You will need to review and update *i*TPM preferences, and you may need to make some changes to your customized roles that access *i*TPM .

⚠️ **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, email support@cgsquared.com to request an update to *i*TPM in your production account.

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

Before you install the *i*TPM 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

ℹ️ **Helpful Hint:** If all journal entries must be approved, check this accounting preference:
Setup -> Accounting -> Accounting Preferences
Under the ***General*** subtab, it "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 *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. UPDATE, don't install. Installing 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:** 312604

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 *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.

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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.

Use Chapter 4 in 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 and Configure Sales Order Report	
Step 10: Setup *i*TPM roles and permissions	
Step 11: Show both item code, display name, Review UOM Descriptions (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 *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 [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)**

ACTION	NAME ▲	BUNDLE ID	VERSION	MANAGED
[icon]	iTPM : Trade Promotion Management	312604	21.1.1 ⚙	Update Available
				Version 21.2.1 has been released

=

7. Follow the NetSuite update steps.

   a. Click UPDATE BUNDLE.

   Preview Bundle Update

   [Cancel] [Update Bundle]

   b. Click OK.

   system.netsuite.com says

   This will update the bundle's full contents to match the latest version from the bundle author.
   WARNING: incompatible changes made to custom records and fields may cause data you've entered to be deleted.
   You might want to back up such data before updating. Proceed?

   [OK] [Cancel]
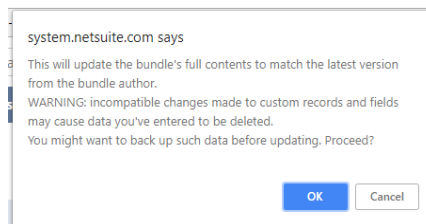
   c. Click REFRESH to see the status of the *i*TPM update.

   Installed Bundles

   [New] | [Refresh]

After *i*TPM is updated, be sure to perform ALL administrator tasks listed in section 2.6.

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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 scheduled 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 |

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.

*i*TPM

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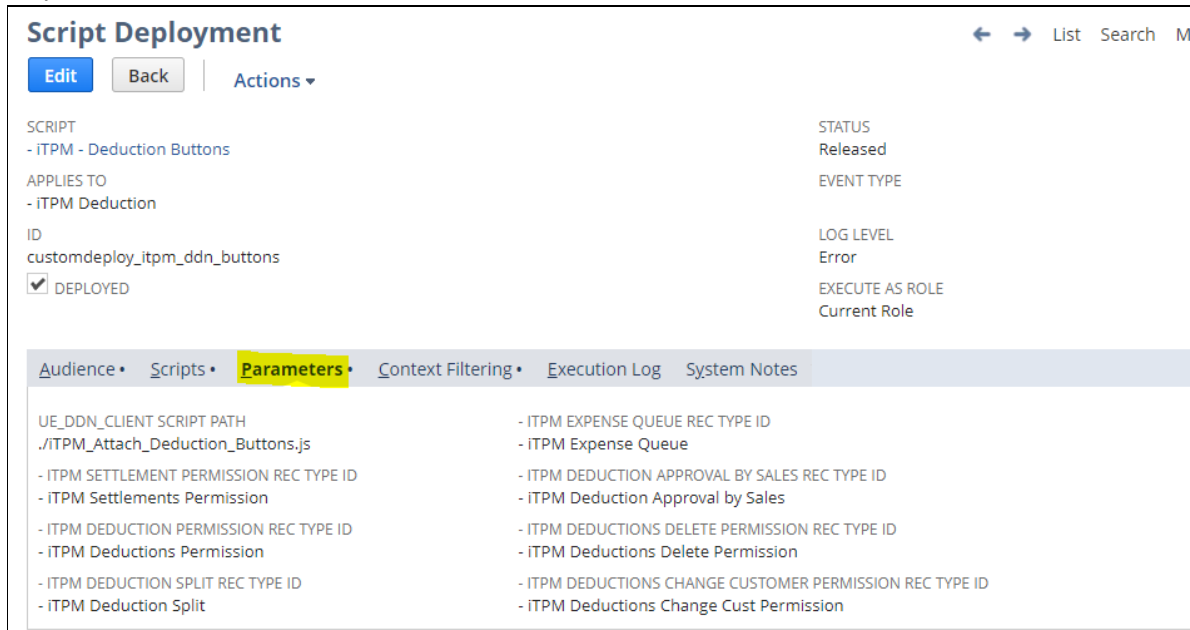
TASK #1: OPTIONAL: Make these changes if you want your users to have access to these deduction buttons:

- 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 "- iTPM Deduction Delete" permission = FULL.

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

- If iTPM applies discounts to 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: If you are updating iTPM with 21.2.1, you may need to populate some of these fields in the script "- iTPM - Deduction Buttons":

TASK #4: If you are using the new Sales Order EDI report, you'll need to configure the parameter in the script so *i*TPM knows what field stores the customer requested price. This is used to compare the customer's price to the sales order and *i*TPM expected prices:

TASK #5: 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 may revert back to the default frequency after *i*TPM is updated. Edit these scripts and change the frequency as needed.

2.7 Suggested Sandbox Testing

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

- We recommend clients that have sandboxes test *i*TPM before updating their production account.

⚠️ **Note: If you installed the *i*TPM 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 *i*TPM managed bundle**.

⚠️ **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.

⚠️ **Important: You, as *i*TPM administrator, are responsible for setting up any new preferences**, NetSuite settings, and performing any 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.

ℹ️ **Helpful hints for testing in Release Preview Accounts:** Schedule scripts do not run in release preview accounts. To run *i*TPM 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 *i*TPM 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.

NETSUITE MAKES NO WARRANTIES OF ANY KIND RELATED TO BUNDLES, INSTALLATION OF A BUNDLE IN A NETSUITE ACCOUNT OR ITS USE WITH A NETSUITE ACCOUNT, WHETHER EXPRESS, IMPLIED, STATUTORY OR OTHERWISE, AND NETSUITE SPECIFICALLY DISCLAIMS ALL IMPLIED WARRANTIES, INCLUDING ANY WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT OF THIRD PARTY RIGHTS, TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW. WITHOUT LIMITING THE GENERALITY OF THE FOREGOING, NETSUITE DOES NOT REPRESENT OR WARRANT THAT USE OF THE BUNDLE WILL MEET YOUR REQUIREMENTS OR THAT YOUR USE OF NETSUITE SERVICE WITH THE BUNDLE WILL BE UNINTERRUPTED, TIMELY, SECURE OR FREE FROM ERROR.

IN NO EVENT SHALL NETSUITE HAVE ANY LIABILITY TO YOU OR ANY THIRD PARTY ARISING OUT OF OR RELATED TO YOUR USE OF THE BUNDLE FOR ANY DIRECT, INDIRECT, SPECIAL, INCIDENTAL, CONSEQUENTIAL, COVER OR PUNITIVE DAMAGES, HOWEVER CAUSED, WHETHER IN CONTRACT, TORT OR UNDER ANY OTHER THEORY OF LIABILITY, AND WHETHER OR NOT YOU HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. WITHOUT LIMITING THE FOREGOING, NETSUITE SHALL HAVE NO LIABILITY FOR LOSS OF PROFITS, REVENUE OR DATA OR FOR INTERRUPTIONS IN SERVICE ARISING OUT OF OR RELATED TO YOUR USE OF THE BUNDLE. THE FOREGOING DISCLAIMER SHALL NOT APPLY TO THE EXTENT PROHIBITED BY APPLICABLE LAW.

4.2 *i*TPM Terms and Conditions

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