*i*TPM

22.1.1 Update

Winter 2022 Release Notes

BFN Certified

Revised January 23, 2022

New Features in *i*TPM 22.1.1

Deduction Management Management Enhancements

1. **S-03153: Add a *SEARCH* button the the Mass Deduction Update** to reduce the number of times the "*Leave Site*?" pop-up message appears.

2. **S-03135:** Add "NOTES" feature of the Non GL Change form to the Mass Deduction update form. (See also S-03140 for Non G/L Changes form on the deduction.)

3. **S-02983: Show the promotion KPI values on the "Resolve Deductions"** form.   (Actual Spending, Expected Spending, and Net Liability)

4. **S-03142:** Prevent users from using the same filename for CSV Splits so deductions can't get stuck in processing status.

5. **S-03207: *iTPM -> Deductions -> Mass Expense*:** An easier way to expense large numbers of open deductions without creating using the CSV Bulk Expense import.

6. **S-03221:** New example role: "*- iTPM Settlements & Deductions (Admin)*"

Promotion Planning

7. **S-02674**: Add **% lift for planning** so users have the option to enter % lift instead of an actual incremental quantity.

8. **S-03161:** Option to **enter estimated revenue for planning promotions**, and let iTPM calcualte the estimated quantity for the item(s) in the promotion.

9. **S-03117**: Create a **DELETE PROMOTION button** so users can delete voided promotions.

10. **S-02944:** Create a new report under the Reports subtab on the promotion to **show all sales orders that overlap the promotion**.

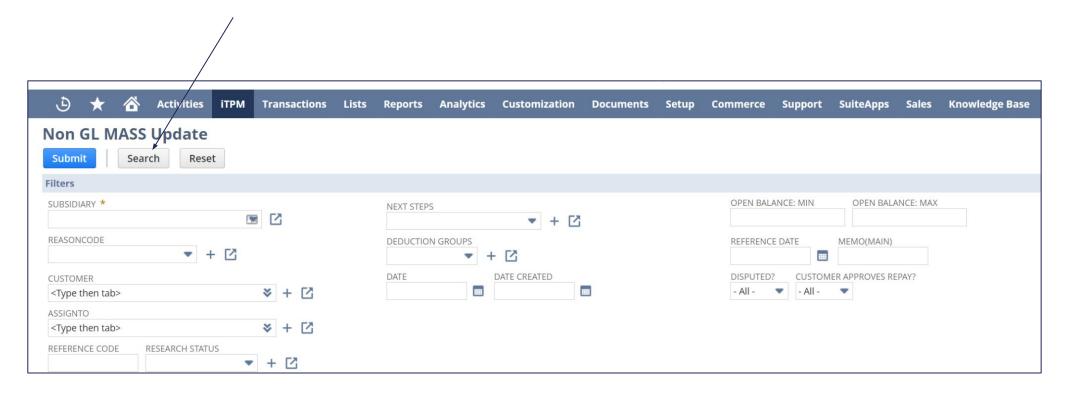11. **S-03223:** Process Plan now tries to find the UOM with the correct internal ID for your item in the promotion.

Applying Off-invoice to sales orders

12. **S-03123:** Sales Order EDI report now uses the EDI UOM if it is populated

13. **S-03178:** When a discount per unit is a never ending fraction, limit the discount item rate description to only four places, like .3333.

14. S-**03223:** Do not apply or remove fixed-price discounts on any item that has a price level of "CUSTOM"
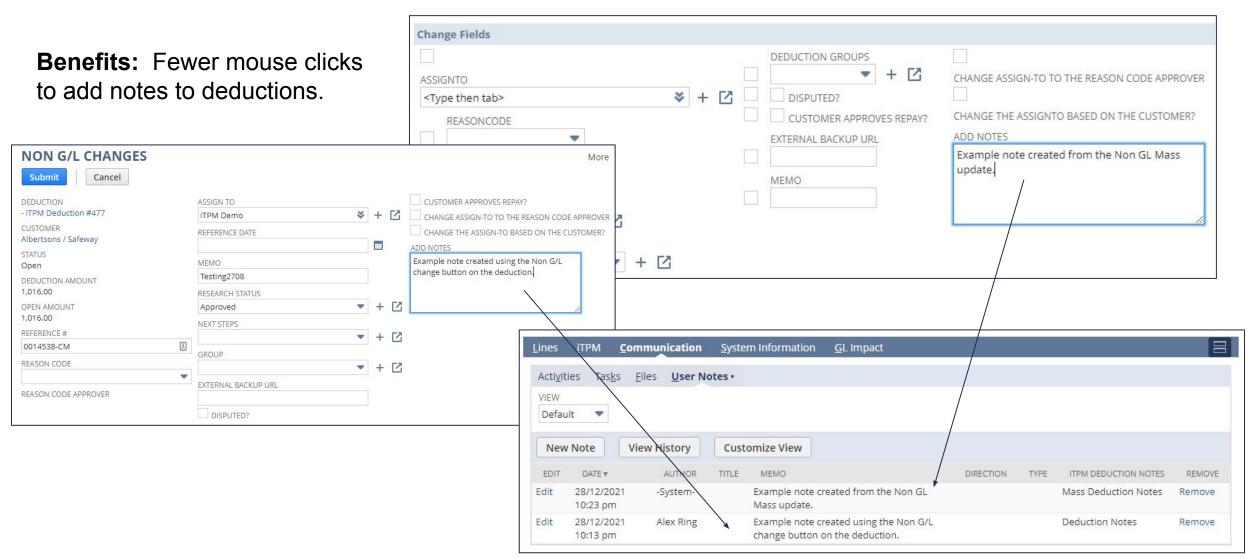
Note: Go to Technical Release notes for 22.1.1 at   www.i-TPM.com/admin-training-resources to see a list of the 50+ changes to *i*TPM

1. Add SEARCH button to the Mass Deduction Update form

Benefits: SEARCH button reduced mouse clicks. Set your filter, then click SEARCH.
This minimizes the times you see the "Leave site" pop-up message
The maximum deductions in this form is 4,000, so set your filter accordingly.

2. Create deduction notes from the *Non GL Change* and *Mass Deduction update* forms.

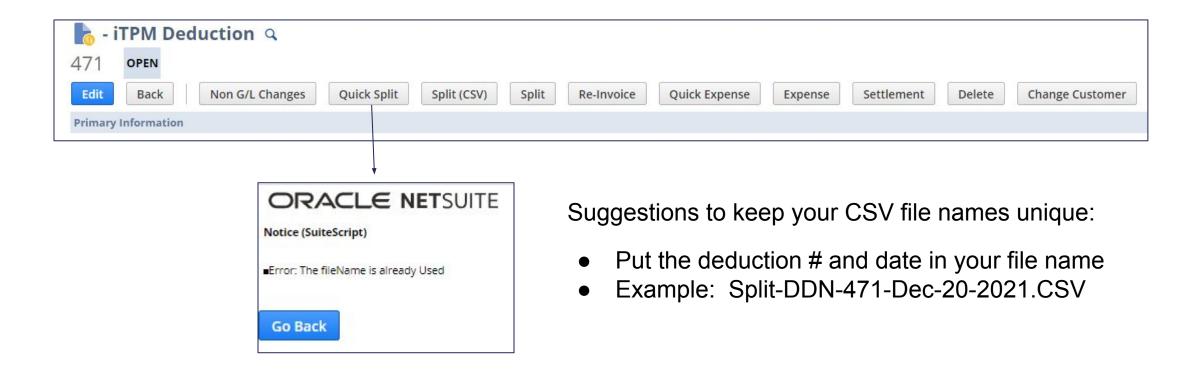**Benefits:** Fewer mouse clicks to add notes to deductions.

3. KPIs are now on the Resolve Deductions form

Benefits: Fewer mouse clicks. See the promotion KPIs as you match the open deduction to the promotion.

4. Prevent users from using the same filename for CSV Splits

Benefits: Prevent one split file from overwritting another CSV file, which causes CSV splits to get stuck. CSV file name must be unique across all deductions.

Suggestions to keep your CSV file names unique:

- Put the deduction # and date in your file name
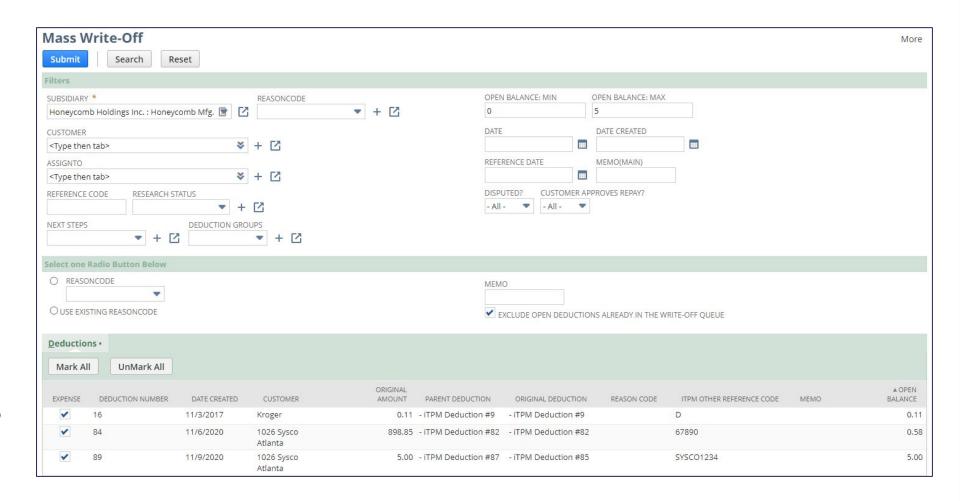- Example: Split-DDN-471-Dec-20-2021.CSV

5. *iTPM -> Deductions -> Mass Expense*

Benefits: Easier way to expense deductions than the *CSV Bulk Expense Import*

1. Set you filter.
2. Click *SEARCH*
3. Choose your expense options
4. Check the deductions to expense.
5. Click *SUBMIT*
6. Deductions go into the Expense Queue in ~15 minutes

Note: Specific role permission required.

6. New standard role: "- *iTPM Settlements & Deductions (Admin)*"

Benefits:

Example role that has access to additional *i*TPM features

- **Change Customer** ... if deduction is in an open period.

     Closed period? You can split off the full amount and then change customer

- **Delete deductions** button ... if deduction is in an open period.

- **Mass Expense**. Similar to CSV Bulk import, without the CSV import!

- NetSuite 'Full' role permissions to delete JE, Settlement and Statement charges

Note: If the *i*TPM JE, Settlement and/or Statement charge is in an open period, you can delete it and *i*TPM will automatically update the deduction status and balance.
     If the deduction is in a closed period, the deduction's posting period must have "*Allow Non G/L Changes*" checked for *i*TPM to update the deduction status and balance.

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7. Add % lift to the planning record

Benefits: Option to enter % lift instead of an actual incremental quantity.

Example: Base of 1,000 eachs with 50% lift: ¿TPM calculates 1,500 total eaches

A base of 1,000 and 500 incremental is the same as entering base of 1,000 with 50% lift.

8. Option to enter estimated total revenue when planning promotions

Benefits: Saves time if planning by revenue.
Let *i*TPM calcualte the estimated quantity for the item(s) in the promotion.

Enter $10,000 Total revenue with 50% lift: *i*TPM uses item price to calculate Base and Inc units

($10,000 / item price of $20) = 500 total eaches
Total eaches = base eaches + (base eaches times 50%)

500 = 1.5 base   so …. Base = 333 eachs, Incremental = 167 eachs = 500 total units

9. *DELETE PROMOTION* button on *VOIDED* promotions

Benefits: If you don't to change the promotion back to DRAFT status and EDIT it, then reduce the data 'clutter' in your promotion lists by deleting promotions.

Note: The *DELETE* button will not appear if there are any accural log or discount log records linked to the promotion. (You can't VOID a promotion that has settlement.)

10. See Sales Orders that overlap your promotion.

Planning	Allowances	Estimated Quantity	Retail Info	KPI's	Settlements	**Reports**	Files	Communication	Workflow

Reports

ACTUAL SALES	ACTUAL SHIPMENTS	SALES ORDERS
Actual Sales	Actual Shipments	Sales Orders Overlapping this Promotion
ACTUAL SALES (PREVIOUS YEAR)	ACTUAL SHIPMENTS (PREVIOUS YEAR)	
Sales - Previous Year	Shipments - Previous Year	
ACTUAL SALES LAST 52 WEEKS	ACTUAL SHIPMENTS LAST 52 WEEKS	
Sales - Last 52 Weeks	Shipments - Last 52 Weeks	

Sales Orders

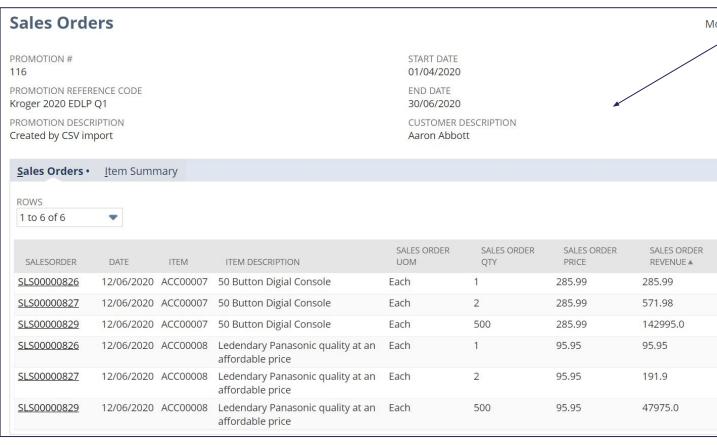| PROMOTION #	START DATE
116	01/04/2020
PROMOTION REFERENCE CODE	END DATE
Kroger 2020 EDLP Q1	30/06/2020
PROMOTION DESCRIPTION	CUSTOMER DESCRIPTION
Created by CSV import	Aaron Abbott

Sales Orders ·   Item Summary

ROWS

1 to 6 of 6

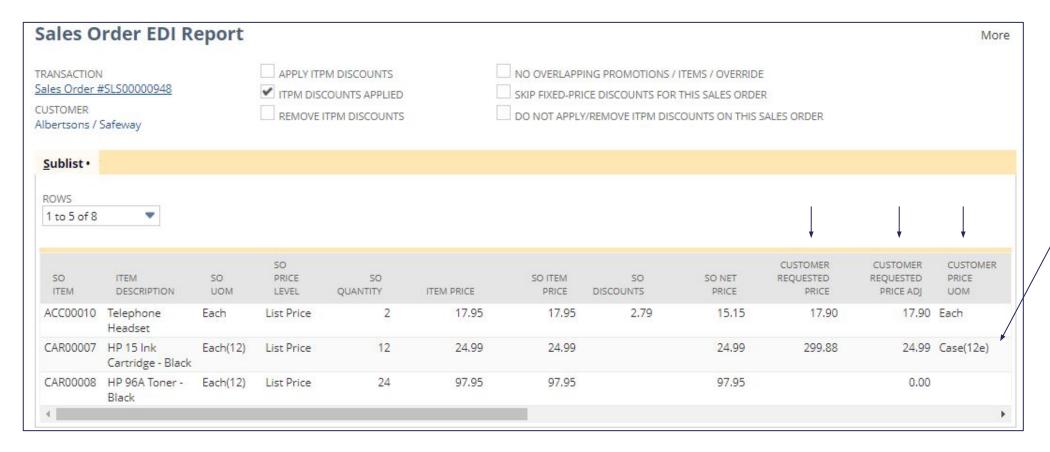| SALESORDER	DATE	ITEM	ITEM DESCRIPTION	SALES ORDER UOM	SALES ORDER QTY	SALES ORDER PRICE	SALES ORDER REVENUE ▲
SLS00000826	12/06/2020	ACC00007	50 Button Digial Console	Each	1	285.99	285.99
SLS00000827	12/06/2020	ACC00007	50 Button Digial Console	Each	2	285.99	571.98
SLS00000829	12/06/2020	ACC00007	50 Button Digial Console	Each	500	285.99	142995.0
SLS00000826	12/06/2020	ACC00008	Ledendary Panasonic quality at an affordable price	Each	1	95.95	95.95
SLS00000827	12/06/2020	ACC00008	Ledendary Panasonic quality at an affordable price	Each	2	95.95	191.9
SLS00000829	12/06/2020	ACC00008	Ledendary Panasonic quality at an affordable price	Each	500	95.95	47975.0

Benefits: Quickly see what sales order overlap your promotion.

This report is similar to the *Actual Sales, Actual Shipments*, and other reports under the *REPORTS* subtab on the promotion.

11. Sales Order EDI report now uses the EDI UOM if it is populated

Benefits: The report converts customer requested price into the same UOM as the sales order so it can correctly compare it to the sales order net price and the ¿TPM price if discounts are applied to the sales order.

Sales Order EDI Report   More

TRANSACTION
Sales Order #SLS00000948

☐ APPLY ITPM DISCOUNTS
☑ ITPM DISCOUNTS APPLIED
☐ REMOVE ITPM DISCOUNTS

☐ NO OVERLAPPING PROMOTIONS / ITEMS / OVERRIDE
☐ SKIP FIXED-PRICE DISCOUNTS FOR THIS SALES ORDER
☐ DO NOT APPLY/REMOVE ITPM DISCOUNTS ON THIS SALES ORDER

CUSTOMER
Albertsons / Safeway

Sublist ·

ROWS
1 to 5 of 8 ▼

SO ITEM	ITEM DESCRIPTION	SO UOM	SO PRICE LEVEL	SO QUANTITY	ITEM PRICE	SO ITEM PRICE	SO DISCOUNTS	SO NET PRICE	CUSTOMER REQUESTED PRICE	CUSTOMER REQUESTED PRICE ADJ	CUSTOMER PRICE UOM
ACC00010	Telephone Headset	Each	List Price	2	17.95	17.95	2.79	15.15	17.90	17.90	Each
CAR00007	HP 15 Ink Cartridge - Black	Each(12)	List Price	12	24.99	24.99		24.99	299.88	24.99	Case(12e)
CAR00008	HP 96A Toner - Black	Each(12)	List Price	24	97.95	97.95		97.95		0.00	

Customer requested price is in cases, but the sales order is in eaches.

¿TPM converts the customer requested price into the sales order UOM for easier analysis.

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Benefits: Fewer EDITs of your promotion to correct the unit-of-measure, & less confusing.
You don't need to change NetSuite UOM descriptions to Each(12), Each(24), etc.
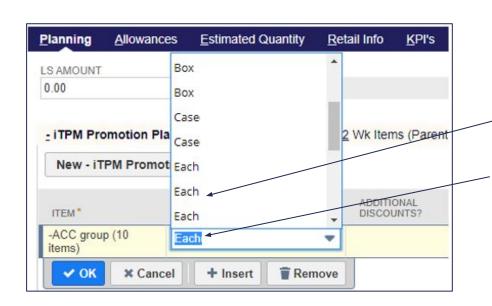When *i*TPM is able to find the correct UOM, it will not default to the item sales unit UOM.

How it works: In NetSuite, there can be many UOMs with EACH as the description.
To NetSuite, you pick "Each" (ID=123), but NetSuite wants "Each" (ID=456).
*i*TPM now tries to find the valid UOM for your item, and changes the ID from 123 to 456.
If *i*TPM finds a valid match, then *i*TPM will not change the UOM to the item's sales UOM.

This could be the correct Unit of Measure (UOM) for your item.
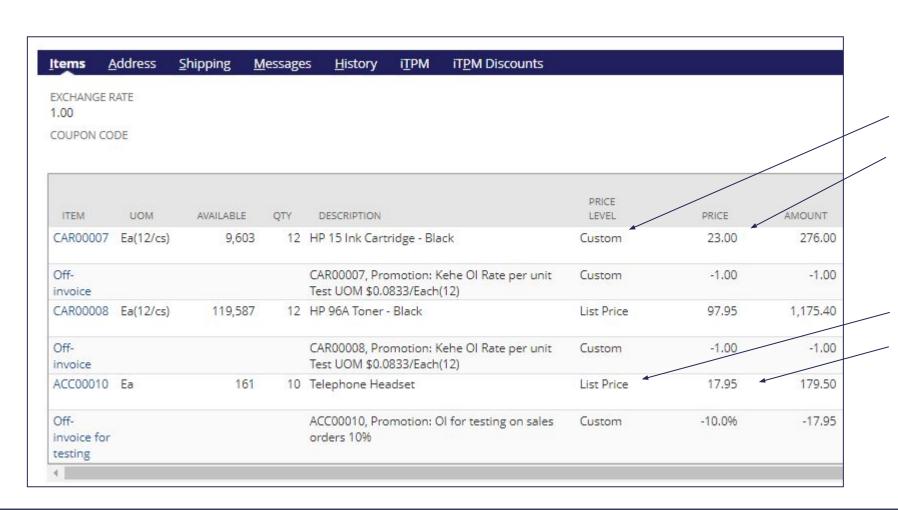It says "Each", but the NetSuite internal ID =456

This is the UOM you select. It says "Each", but the NetSuite internal ID =123
When you use *Process Plan*, *i*TPM will look for and use ID=456.

13. Limit the discount item allowance rate description to only four places

Benefits: More professional looking discount item descriptions on your sales orders and invoices.

14. Do not apply or remove fixed-price discounts if the item's price level is "CUSTOM"

Benefits: No mouse clicks required if customer service needs to override a price on the sales order.

Even if there are fixed-price discounts that could be applied to item CAR00007, ¿TPM will not apply them because the price level is CUSTOM

Item ACC00010 on the same sales order has a the "List Price" price level.
If there is a fixed-price discount for this item, ¿TPM will apply it and change the item price in the sale order.

Update Schedule

The next update is tentatively scheduled for Summer **2022.**

¿TPM Anticipated Releases	Anticipated Date Generally Available*
'Minor' Updates 22.1.x	As needed. Release date and enhancements may change based on client needs and requests.
'Major' Release **22.2**.1	Summer 2022. Release date and enhancements may change based on client needs and requests.

* Subject to change

Summary

- Email questions and issues to support@cgsquared.com

- Updated User Guides are available online at

  www.i-TPM.com/promotion-planning

  www.i-TPM.com/deduction-management

  www.i-TPM.com/apply-off-invoice

  www.i-TPM.com/analytics

- Technical release notes available at www.i-TPM.com/admin-training-resources