

Integrated Trade Promotion Management

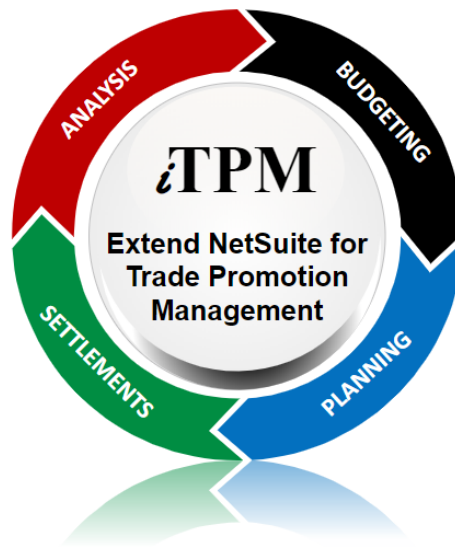


iTPM Admin Release & Install Notes

Version **22.1.1** Update

January 18, 2022

Revised January 19, 2022



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 or 21.1.1 to 22.1.1

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 22.1.1 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 21.2.1 is available.	As time allows, read Chapter 1 and Section 2.6 in these technical release notes and the <i>What's New In 22.1.1</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 22.1.1. 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 22.1.1

The following changes were made to iTPM after November 12, 2021 and are included in iTPM version 22.1.1.

- iTPM 22.1.1 will be tested with NetSuite 2022.1, and submitted for re-certified as Build-for-NetSuite
- This list begins with Agile Development iteration #190 through #200:
- Defect tickets start with "D". Enhancement tickets start with an "S"

Notable enhancements are bolded.

The following stories were added to iTPM after Nov 12, 2021:

- S-03135 Add the new "NOTES" feature of the Non GL Change form to the Mass Deduction update form. (See also S-03140)
- S-03139: Enhance the SO EDI report so it works even if the parameter for the customer price columns in the report is blank.
- **S-03117: Create a DELETE button so users can delete voided promotions.**
- S-03122: Create a script to connect two NetSuite data sets.
- S-03149: Add a new feature to the Mass Deduction Change form to add notes to multiple deductions, similar to the feature in the Non G/L change form.
- S-03000: Create another saved search under the Allowances subtab to show if the item is inactive.
- S-02962: Remove the pop-up form when saving a sales order that previously had iTPM discounts applied.
- S-03142: **Prevent users from using the same filename for CSV Splits so deductions can't get stuck in processing status.**
- S-03153: Add a SEARCH button the the Mass Deduction Update and Mass Copy Promotion forms to reduce the number of times the "Leave Site?" pop-up message appears.
- D-03190: Process plan should mark the planning record field "Processed?" as "NO" if all items in the item group are inactive, and it should add a note to the Processing Note field.
- S-02673: Add the REMOVE button to the promotion planning grid as an easier way to remove unwanted planning rows in draft promotions.
- S-03152: When someone uses the new REMOVE button on a planning row, force the other rows in the promotion to Process? = "No" so the promotion must have 'Process Plan' run again before the submit button will be available.
- D-03191: The Promotion Calendar Report does not correctly support DD/MM/YYYY data formats.
- **S-02674: Add % lift to the planning record so users have the option to enter % lift instead of an**

actual incremental quantity.

- D-01392: The Back-to-Draft button is sometimes visible for a role when it should not be visible.
- S-01394: The deduction open amount is not showing on the settlement form as a view-only field.
- **S-02983: Show the promotion KPI values on the "Resolve Deductions" forms.**
- S-03143: Change the names of some scripts and objects to include "itpm" and conform to our standard naming conversions.
- S-03146: Change the MEMO field in the default deduction list view to be the main Memo field, not the memo field from the deduction lines.
- D-01394: The iTPM stored KPI for incremental units measure is incorrectly calculated when the value of incremental units is zero in the planning grid.
- **S-03161: Option to enter estimated revenue when planning promotions, and let iTPM calculate the estimated quantity for the item(s) in the promotion.**
- **S-03003: Create a new report to help users find deductions where the sum of all related transactions is out-of-balance. iTPM -> Reconciliation -> Out-of-Balance Deductions**
- **S-02944: Create a new report under the Reports subtab on the promotion that shows all sales orders that overlap the promotion.**
- S-03164: Create a banner on the deduction, similar to the one on the credit memo, if the deduction amount does not match the amount on the related credit memo.
- S-03156: Modify the reports under the Reports subtab on the promotion to support DD/MM/YYYY format for UK and Australia iTPM clients.
- S-03162: Modify the CSV Split validations to support DD/MM/YYYY format for UK and Australia clients.
- S-03178: When a discount per unit is a never ending fraction like .333333, limit the rate description to only four places like .3333 in the discount item description on the sales order.
- S-03181: Add filtering on a deduction open balance to the Mass Deduction Update form.
- S-03185: Add the impact price UOM to the allowances sub-list to help users see how iTPM does UOM conversions of rate-per-unit allowances.
- D-01397: When the allowance UOM was different from the UOM in the sales order, iTPM incorrectly displayed the allowance UOM instead of the sales order UOM. (iTPM correctly converted the allowance to the sales over UOM, and correctly created the discount item. This defect was only an error in the discount item description.)
- S-03196: Set subsidiary to blank when first loading the Non GL Mass Update form. (This is to allow the form to load for clients that have greater than 4,000 open deductions.)
- S-03202: Don't create a process plan message if an item has a zero base price but the item has a non-zero price for the promotion's price level.

- S-03206: Add reason code as a column in the Open Deductions by Month report
- S-03203: If "Show at Retail" is not checked in the promotion type, then don't create retail performance records.
- S-03200: Change the reference code filter in the Mass Deduction Update filter to be an incremental search, instead of an exact match.
- S-03154: Allow 3 roles to edit assign-to date in the deduction: NetSuite Admin, iTPM Admin, and the new role, "- iTPM Settlements and Deductions (Admin)"
- S-03217: Do Not apply or remove fixed-price discounts on sales orders if the item has the price level of CUSTOM. (S-03088 was the design story)
- S-02981: Create a new saved search to find iTPM Credit memos that have one or more lines with negative values.
- **S-03223: Add logic to Process Plan to look for the correct UOM when the UOM selected has the same description but a different internal ID code. Example: The user selects Case, but the correct UOM is Case. (Both have the same UOM description, but internal ID 123 is selected, but NetSuite needs internal ID 567)**
- **S-03221: Create a new role, "- iTPM Settlements and Deductions (Admin)" that has all of the admin features for deduction management, including change customer, mass expense and the permissions to delete deductions, JEs, settlements and statement charges.**
- **S-03207: Mass Expense deductions through the UI for up to 4,000 open deductions without a CSV Bulk import.**
- S-03228 Right justify the KPI numbers on the promotion list when creating a settlement from a deduction.
- S-03215 Change two saved CSV import that trigger a process plan, and one that creates promotions.
- S-03216 Move the KPIs on the Resolve Deductions form to make them more readable.
- S-03224: Right-justify the numbers on the reports under the reports subtab on the promotion.
- S-03219: The requested amount fields should not be open to editing on the Settlement form.
- D-01393: Fix an issue with the script that creates new allowances when an item is added to the item group. Under some circumstances, the script can create the allowance with the wrong UOM.

1.2 Upcoming changes



You may be required to update to 22.1.1 on or before iTPM version 22.1.2 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*
22.1.x	Minor updates as needed. iTPM 22.1.x will be minor releases to fix critical bugs, and the addition of minor features requested by clients.
22.2.x	Summer 2022 Major release with significant enhancements After iTPM 22.2.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.
- 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_ls_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 | Rules | Email | Audit Trail | Execution Log

USE EXPRESSIONS

Standard | Summary

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 22.1.1.

iTPM Bundle Details	Release 22.1.1
Design, development, testing and publishing	November 12, 2021 - January 18, 2022
Bundle release date	Latest release is January 18, 2022
Publisher ID	44277 CG Squared, Inc.
Bundle ID	Bundle #312604
NetSuite Built-for-NetSuite review?	iTPM 21.2.1 was tested with Netsuite 2021.2 and received Built-for-Netsuite certification. iTPM 22.1.1 will be tested with Netsuite 2022.1 in January / February 2022 and submitted for 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 iTPM preferences, and you may need to make some changes to your customized roles that access iTPM .



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, 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 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

[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 and Configure Sales Order Report	
Step 10: Setup iTPM 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 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	21.2.1 	Yes
	iTPM Connector	286463	20.	

Update Available

Version 22.1.1 has been released

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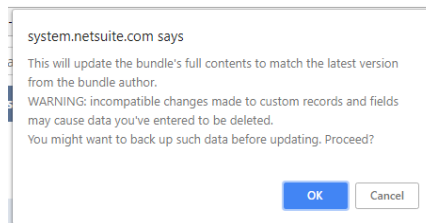
7. Follow the NetSuite update steps.

- 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](#)

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 TSTDVR1837465 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.

Note: Subsidiary in NetSuite NON-One World accounts may not be populated on the first install of NetSuite. See section 4.3, on how to populate subsidiary in iTPM Preferences.for Non-One-World.,

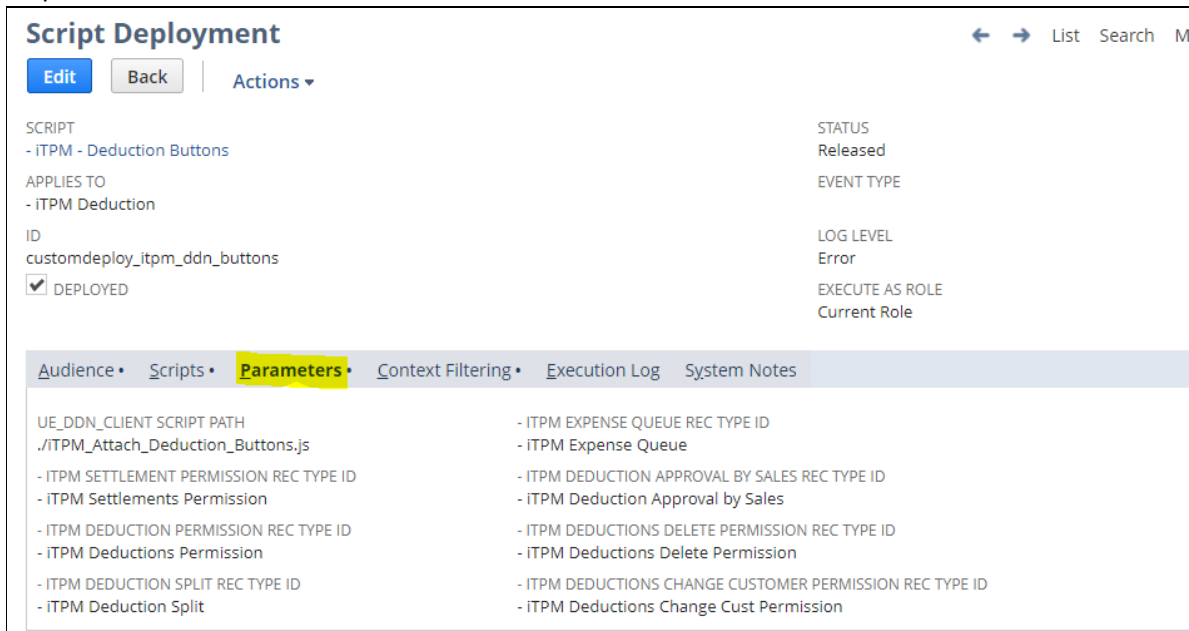
TASK #1: OPTIONAL: Make these changes if you want your users to have access to these deduction buttons:

- 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”:



Script Deployment

Script: - iTPM - Deduction Buttons (Status: Released)

Applies to: - iTPM Deduction (Event Type)

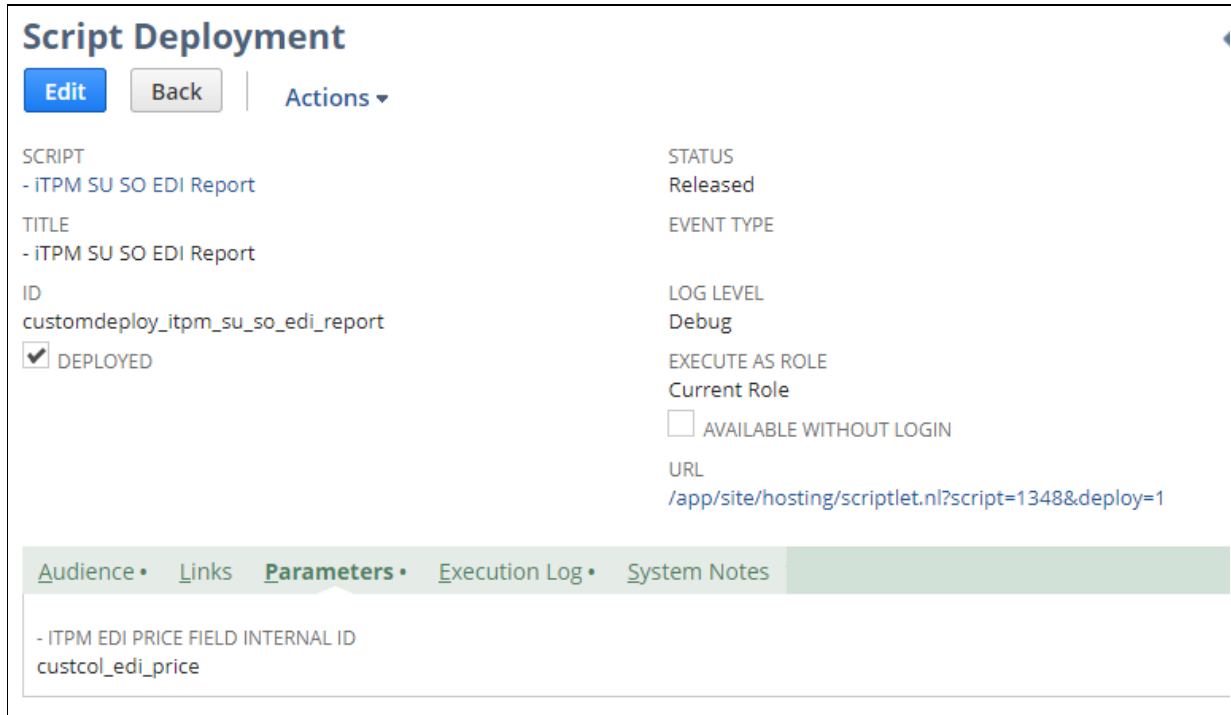
ID: customdeploy_itpm_ddn_buttons (Log Level: Error)

DEPLOYED (Execute as Role: Current Role)

Parameters

UE_DDN_CLIENT SCRIPT PATH	- iTPM EXPENSE QUEUE REC TYPE ID
./iTPM_Attach_Deduction_Buttons.js	- iTPM Expense Queue
- iTPM SETTLEMENT PERMISSION REC TYPE ID	- iTPM DEDUCTION APPROVAL BY SALES REC TYPE ID
- iTPM Settlements Permission	- iTPM Deduction Approval by Sales
- iTPM DEDUCTION PERMISSION REC TYPE ID	- iTPM DEDUCTIONS DELETE PERMISSION REC TYPE ID
- iTPM Deductions Permission	- iTPM Deductions Delete Permission
- iTPM DEDUCTION SPLIT REC TYPE ID	- iTPM DEDUCTIONS CHANGE CUSTOMER PERMISSION REC TYPE ID
- iTPM Deduction Split	- iTPM Deductions Change Cust Permission

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



The screenshot shows the 'Script Deployment' interface. At the top, there are buttons for 'Edit' (in blue), 'Back', and 'Actions' with a dropdown arrow. Below this, the script details are listed in two columns:

SCRIPT	- iTPM SU SO EDI Report	STATUS	Released
TITLE	- iTPM SU SO EDI Report	EVENT TYPE	
ID	customdeploy_itpm_su_so_edi_report	LOG LEVEL	Debug
<input checked="" type="checkbox"/> DEPLOYED		EXECUTE AS ROLE	Current Role
		<input type="checkbox"/> AVAILABLE WITHOUT LOGIN	
		URL	/app/site/hosting/scriptlet.nl?script=1348&deploy=1

Below the details is a navigation bar with tabs: Audience, Links, Parameters (selected), Execution Log, and System Notes. Under the 'Parameters' tab, the following parameter is listed:

- iTPM EDI PRICE FIELD INTERNAL ID
custcol_edi_price

TASK #5: 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

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