*i*TPM

22.2.1 Update

Summer 2022 Update Release Notes

*i*TPM
Extend NetSuite for
Trade Promotion
Management

Built for
ORACLE
NETSUITE

Native SuiteApp

BFN Certified

Revised July 11, 2022

New Features in ¿TPM 22.2.1

Deduction Management Management Enhancements

1. S-03190 **SPLIT LINE creates one deduction for each line in your credit memo**, which saves time splitting deductions

2. S-03377 **Reason code in the credit memo line now populates reason code in the deduction.**

3. S-03241 REINVOICE now automatically checks the "*Customer agrees to repay*" checkbox.

4. S-03325 & S-03327 Mass Expense and Mass Update now support up to 3,000 deductions at a time.

Promotion Planning

5. S-03247 **"Planned Spend" calculated in real-time** for each promotion planning row.

6. S-03324 Easy way to **Change Estimated Quantity** in approved promotions

7. S-03289 New option in the promotion: **"*Any item sold to this customer gets this discount*"**. (See also S-03247)

8. S-03288 New option for Process Plan: "*Only create allowances for items that were sold to the customer in the last 52 weeks*"

9. S-03477 **New COPY PROMOTION button copies in real-time**

10. S-03310 **Mass Status change** admin tool to change the promotion the status of a large number of promotions.

11. S-03451 **Show the monthly base forecast** in the promotion planning subtab

12. S-03292 & more: New Event PLAN makes it **easier to create promotions from an Excel planner**

   Note: Go to Technical Release notes for 22.1.2 at   www.i-TPM.com/admin-training-resources to see a list of the 100+ changes to ¿TPM in 22.2.1

1. SPLIT LINE creates one deduction for every line in your credit memo

Benefits: Fewer mouse clicks if your credit memo has the detail for splitting the deduction.

The reason code, memo and amount from the CM line is pre-populated into the SPLIT deduction form for review before splitting the deduction, up to 30 lines.

2. Reason code in CM line now populates deduction reason code

Benefits: Save time populating reason code if you know it when creating your credit memo.

3. After creating the statement charge, "*Customer agrees to repay*" is automatically checked.

Benefits: Fewer mouse clicks to use the "*Customer agrees to repay*" checkbox for reporting.
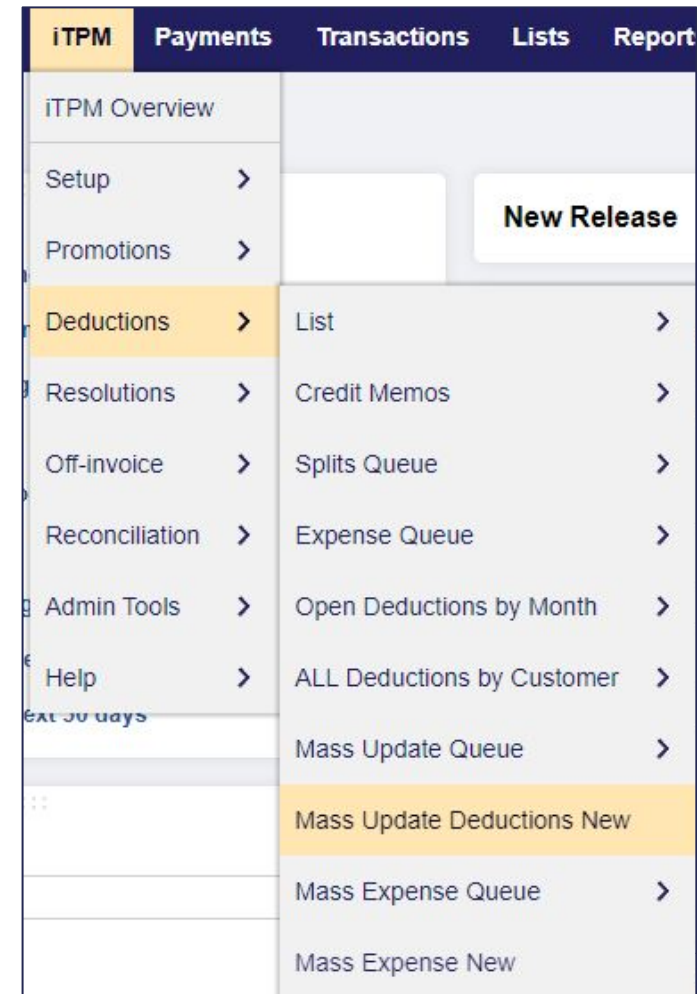
4. Mass Expense and Mass Deduction update support up to 3k deductions

Benefits: You can now update non-GL deduction attributes or mass-write-off up to 3,000 deductions with fewer mouse clicks.

Set your filter to view up to 3,000 deductions at a time.

Select the deductions you want to update or expense, and then SUBMIT.

If you have more than 3,000 deductions, use the Mass Update or Mass Expense feature again until you processed all the deductions.

New Features in *¡*TPM 22.2.1

Promotion Planning

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5. New real-time KPI "Planned Spend" under the Planning subtab

Benefits: Know KPIs as soon as you save your promotion, even before you run Process Plan.

Note: If you have more than 25 planning rows, you still need to run Process Plan to see your promotion KPIs.

6: Easy way to update estimated quantity in *approved* promotions

- iTPM Promotion

Test S-03320

| Edit | Back | Resolve Deductions | Adjust Spend | Refresh KPIs | Update Quantity | End Promotion |

Promotion Informati

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Benefits: Fewer mouse clicks to update estimated quantity in approved promotions.

Update Estimated Quantity

More

| Submit | Cancel |

PROMOTION #
Test S-03320

CUSTOMER
Walmart

Planning records ·

UPDATE	PLANNING ID	ITEM	UNIT	MOP	%	▲ RATE	BASE	INCREMENTAL	%LIFT	REVENUE
☑	iTPM_PP1555	- Acc group A (5 items)	Each	Bill-Back		1.00	1,000	750	0.0%	
☐	iTPM_PP1556	CAB00004	Each	Bill-Back		1.00	50	50	0.0%	

| Planning | Allowances | Estimated Quantity | Retail Info | KPI's | Settlements | Reports | Files | Communication | Workflow | System Information | Accrual |

| LS AMOUNT | LS ACCOUNT | | PLANNED SPEND | TOTAL PLANNED SPEND | | ACCOUNT |
| 500.00 | 4009 Sales : Trade Promotion (contra revenue) | 1,600.00 | 2,100.00 | | 4009 Sales : Trade Promotion (contra revenue) |

- iTPM Promotion Plannings ·   52 Week Items ·   52 Wk Items (Parent)

VIEW
| Default View ▾ |

- ITPM PROMOTION PLANNING

| New - iTPM Promotion Planning | Attach | Customize View |

EDIT	ID	ITEM ▲	ITEM DISPLAY NAME	UNIT	MORE DISC?	MOP	%	RATE	BASE	INCREMENTAL	% LIFT	REVENUE	REDEMPTION	PLANNED SPEND
Edit	iTPM_PP1555	- Acc group A (5 items)		Each	No	Bill-Back		1.00	1,000	750	0.0%		100.0%	1,500.00

If changed, "Quantity Changed" is checked for reporting.

Changes are also documented under User Notes.

22.2.1 Update

7. New "*Any item sold to customer gets this discount*" checkbox

How it works:
- Create your promotion with any single item or item group, and check this checkbox.
- Process plan creates allowances for the item and item groups in the promotion.
- If the customer buys any items not already in the promotion, *i*TPM *automatically* adds those items to the promotion every night.

Benefits:
- Better support for promotions where the discount is for all items sold to the direct customer
- You don't need to know what items the customer buys, or put all items into your promotion group

8. Option to only create allowances for items sold to the customer

How it works:
If checked, Process Plan only creates the item allowance if the item was sold to the customer in the last 52 weeks and it's sub-customers.

Benefits:
Fewer item allowaces creates less data inside NetSuite and requires less processing.

- iTPM Promotion Type
Slotting / Free fill

Edit   Back   Actions ▾

List   Search

Primary Promo Information

PROMOTION TYPE DESCRIPTION
Slotting / Free fill

OTHER REFERENCE CODE

METHODS OF PAYMENT
Bill-Back
Off-Invoice

VALID MERCHANDISING TYPES
Other

FINANCIAL IMPACT
Expense

VALID ACCOUNTS
6012 New Distribution

DEFAULT ACCOUNT
6012 New Distribution

NUMBER OF DAYS BEFORE AUTOCLOSURE
180

Additional Promo Information

☐ SHOW ORDER DATES?
☐ SHOW PERFORMANCE DATES?
☐ SHOW AT RETAIL?
☐ VALID FOR INDIRECTS?
☑ ALLOW SETTLEMENTS WHEN PROMOTION IS ACTIVE?
☐ DO NOT UPDATE LIABILITY BASED ON ACTUALS
☑ APPLY PERCENTAGE ALLOWANCES AS PERCENTAGE DISCOUNTS
☐ ONLY CREATE KPI AND ALLOWANCE FOR THE FIRST ITEM IN ITEM GROUP?

☐ BASE DEAL?
☐ REQUIRE ESTIMATED QUANTITY?
☐ PLAN INCREMENTAL SEPARATE FROM TOTAL?
☑ AVAILABLE
☑ REQUIRE PROMOTION PERIOD SHARE
DISCOUNT ITEM FOR OFF-INVOICE

☑ AUTO APPROVE L1 IF FUTURE CONDITION?
☐ PROCESS PLAN TO EXCLUDE ITEMS THAT WERE NOT SOLD IN THE LAST 52 WEEKS

9. New COPY PROMOTION button

Benefits:
See side-by-side the existing promotion and new promotion's information.

Copy is in real-time.
No waiting. ... If more than 25 or fewer items or item groups, use *Action -> Copy.*

10. Mass Status Change for promotions

Benefits: Fewer mouse clicks to submit and/or approve promotions when creating large number of promotions by CSV import or from Plans.

Note: Mass Status Change does not currently support changes *FROM* approved status, only *TO* approved status.

Promotion Status Update

Submit | **Search** **Reset**

Filters

SUBSIDIARY *
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CUSTOMER
<Type then tab>

OWNER
<Type then tab>

PROMOTION TYPE

START DATE   END DATE

STATUS *
Draft

Select the option from dropdown to change the Promotion status

STATUS TO
Pending Approval

Promotion List ·

Mark All   **UnMark All**

UPDATE	PROMOTION ▲
☐	$15,099: Future promotion: Alex
☐	2021 EDLP pricing
☐	2022 Plan by revenue (no lift)
☐	Active promotion, promotion type NOT CHECKED

** This feature is ONLY available to the NetSuite Admin and iTPM Support roles: *iTPM -> Admin Tools*

11. Show Monthly Base Forecast in the promotion

Benefits: Fewer mouse clicks to incorporate your forecasted base volume into your promotion.

Note: More details in the Annual Planner User Guide. See also *iTPM -> Annual Plan -> Base Forecast*

12. Easier way to create promotions from an Excel planner

How it works:

1. **Plan promotions in Excel**.
2. Use **NetSuite CSV** import to create Event Plans in NetSuite.
3. **Review** and Modify your Event Plans as needed.
4. **Check "*Create or Update iTPM promotion*"** in the Event Plan.
5. **Promotion is automatically created** by a script that can run every 15 minutes.

Demand Planning, SPINs, etc.

Excel: Monthly Base

Excel: Planned Events

CSV Import

Monthly Base **+** Planned Events **= Forecast**

Trade Budget

*i*TPM **PROMOTION**

Workflow:
- Draft
- Submitted
- Approved
- Rejected
- Closed
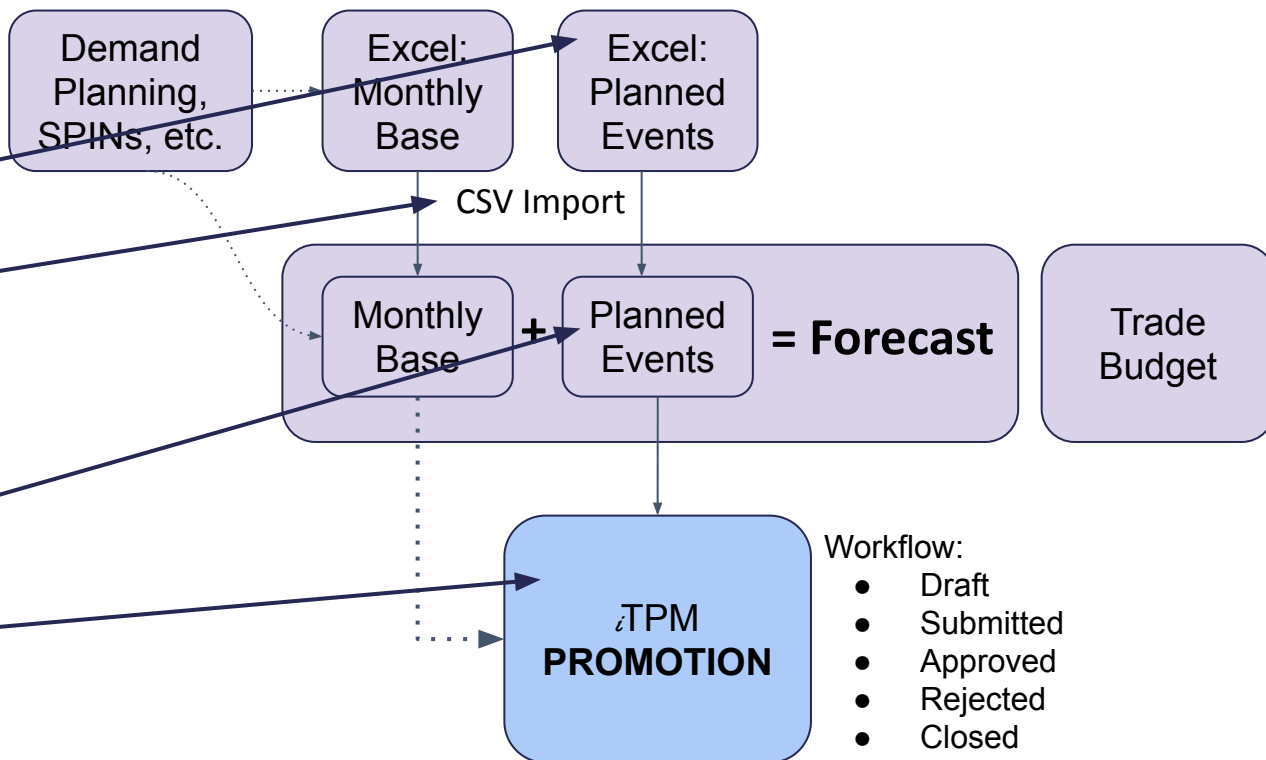
12. Create promotions from simplified Excel promotion planner

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
1	Year	Customer	Promotion Type	Promotion #	Planning ID	Title / Reference Code	Approval Status	Group?	Period	Weeks performance	Ship Date start	Ship date end	Item	Item Display Name	Unit	MOP	% Discount	Rate	Redemption	Lump Sum	Base	Incremental	% Lift
2	2022	Walmart	EDLP			Annual 10% OI off Brand A		No	Jan-Dec	52			Brand A	Brand A (5 items)	Each	Off-invoice	10.00%	0.00	100.00%	123.00	105		50.00%
3	2022	Walmart	Scans			Feb 15 bill-back			Feb	4	2/1/2022	2/28/2022	ACC0002	Brand A, item 2	Case	Bill-back		1.5					
4	2022	Walmart	Scans			Example May bill-back			May	4	1-May	5/1/2022	ACC0002	Brand A, item 2	Each	Bill-back	10.00%		100.00%	200			30.00%

Base Forecast | **Planned-Events** | Menus | ⊕

Benefits:

- Only one CSV file needed to create a promotion.
- Simpler CSV import with only 9 required fields and fewer data validations than an *i*TPM promotion.
- *i*TPM can fill in missing data and default values *after* the CSV import.
- Automated Data validation
- Check "*Create or update promotion?"*, and *i*TPM will create a promotion using the Event Plan.

12. Create promotions from simplified Excel promotion planner

Benefits:
Easier way to create and updte promotions using data from Excel.

Example:
Promotion #28427 was created from Event Plan 716.

Update Schedule

The next update is tentatively scheduled for Winter **2023**.

¿TPM Anticipated Releases	Anticipated Date Generally Available*
'Minor' Updates 22.2.x	As needed. Release date and enhancements may change based on client needs and requests.
'Major' Release **23.1**.1	Winder 2023. 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