

iTPM

22.2.1 Update

Summer 2022 Update Release Notes



BFN Certified

Revised July 11, 2022

New Features in iTPM 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 iTPM 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 screenshot shows the top of the iTPM Deduction interface. At the top left, there is a document icon with a yellow '1' badge, followed by the text '- iTPM Deduction' and a search icon. Below this, the number '3958' is displayed next to an 'OPEN' button. A row of buttons follows: 'Edit' (blue), 'Back' (grey), 'Non G/L Changes' (grey), 'Quick Split' (grey), 'Split Lines' (grey), 'Split (CSV)' (grey), and 'Split' (grey). An arrow points from the 'Split Lines' button down to the next screenshot.

The screenshot shows a table with columns: 'Lines', 'iTPM', 'Communication', 'System Information', and 'GL'. The table contains four rows of data:

Lines	iTPM	Communication	System Information	GL
ACCOUNT			DEBIT	CREDIT
1999 iTPM Open Deductions				200.00
1999 iTPM Open Deductions				1,800.00
1999 iTPM Open Deductions				1,000.00
1999 iTPM Open Deductions			3,000.00	

The screenshot shows the 'iTPM Deduction Split' form. At the top, there are 'Save' and 'Cancel' buttons. Below them is a 'CUSTOM FORM' dropdown menu set to '- iTPM Deduction Split Form'. There is an 'INACTIVE' checkbox. The 'iTPM DEDUCTION' dropdown is set to '- iTPM Deduction #3958'. Below this, the 'iTPM AMOUNT' and 'iTPM OPEN BALANCE' are both 3,000.00. On the right side, there are two checkboxes: 'iTPM SPLIT PROCESS COMPLETED?' and 'iTPM IMPORT COMPLETED?'. Below these are 'TOTAL LINE AMOUNT' (0.00) and 'REMAINING AMOUNT' (0.00). At the bottom, there is a table with columns: 'Splits', 'Notes', and 'Files'. The table has a header row and three data rows:

SPLIT REFERENCE CODE	SPLIT MEMO	SPLIT AMOUNT*	SPLIT DISPUTED?	SPLIT DEDUCTION	SPLIT REFERENCE DATE	SPLIT REASON CODE	EXPENSE?
Ref 123	Ref 123	200.00				Damages	
Ref 456	Ref 456	1,800.00				Open deductions	
Ref 789	Ref 789	1,000.00				Trade promotion	

Below the table is an input field with '0.00' and a '<Type then tab>' prompt. At the bottom are 'Add', 'Cancel', 'Insert', and 'Remove' buttons.

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.

Items 2,000.00 • Apply 0.00 •

Add Multiple Upsell Items Clear All Lines

PRICE LEVEL	RATE	AMOUNT	TAX CODE *	TAX RATE	OPTIONS	COST ESTIMATE TYPE	EST. EXTENDED COST	ITPM DISCOUNTS APPLIED?	ITPM COMMIT QUANTITY DISCOUNT	CUSTOMER REQUESTED PRICE	EDI UOM	CUSTOMER REQUESTED PRICE UOM	ITPM REASON CODE FOR DEDUCTIONS
Custom		2,000.00	-Not Taxable-			Item Defined Cost	0.00						Damag ▼

Transaction Detail

ITPM AMOUNT *	SPLIT OFF	REASON CODE
2,000.0	0.00	Damages ▼
OPEN BALANCE *	TOTAL SETTLEMENTS	MEMO
2,000.0	0.00	
APPLIED JE AMOUNT	APPROVAL NOTES	EXTERNAL BACKUP URL

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.

The screenshot shows the 'iTPM Deduction' interface for entry 490. At the top, there are several action buttons: Edit, Back, Non G/L Changes, Quick Split, Split (CSV), Split, Re-Invoice, Quick Expense, Expense, Settlement, and Delete. Below these is a 'Primary Information' section with a table of details. Two blue arrows point from the top of the page to the 'Re-Invoice' button and the 'CUSTOMER APPROVES REPAY?' checkbox.

Primary Information			
ENTRY NO. 490	ITPM CUSTOMER Walmart	TRANSACTION <u>Credit Memo #MEM00000267</u>	ORIGINAL DEDUCTION - iTPM Deduction #480
ITPM OTHER REFERENCE CODE 213456	DATE 12/31/2022		PARENT DEDUCTION - iTPM Deduction #486
STATUS Open	POSTING PERIOD Dec 2022		ITPM APPLIED TO - iTPM Deduction #486
RESEARCH STATUS Other	REFERENCE DATE 01/13/2022		<input type="checkbox"/> DISPUTED?
NEXT STEPS Contact Customer			<input type="checkbox"/> CUSTOMER APPROVES REPAY?
GROUP Retail			

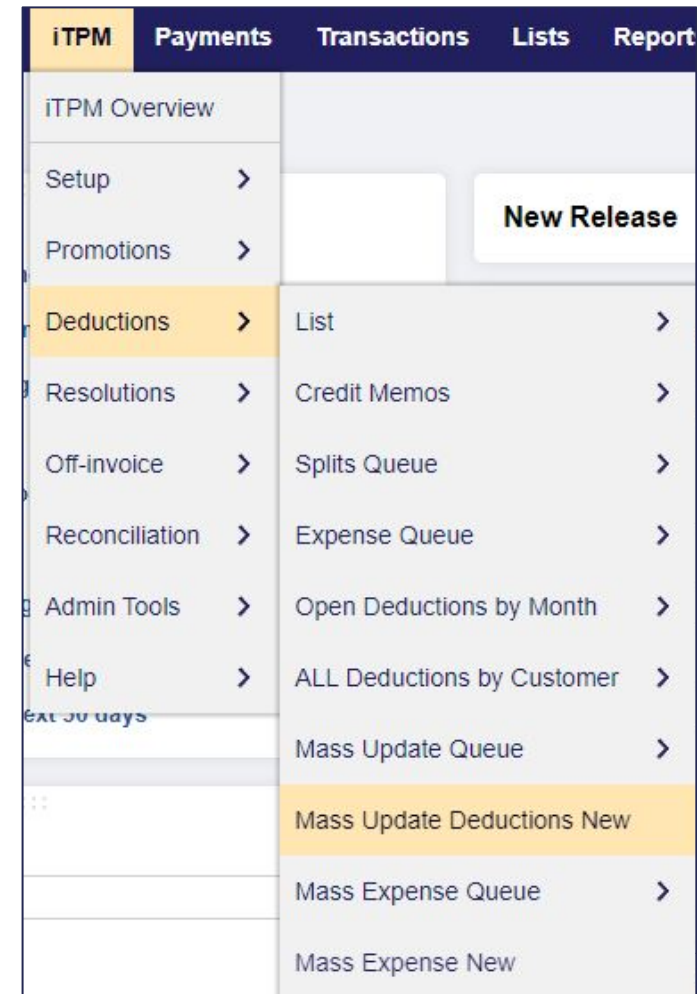
4. Mass Expense and Mass Deduction update support up to 3k deductions

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.



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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"**
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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.

The screenshot displays the 'Planning' subtab in the i-TPM system. At the top, a navigation bar includes tabs for 'Planning', 'Allowances', 'Estimated Quantity', 'Retail Info', 'KPI's', 'Settlements', 'Reports', 'Files', 'Communication', 'Workflow', 'System Information', 'Accrual', and 'Overlapping Promotions'. Below this, summary statistics are shown: 'LS AMOUNT 1,000.00' and 'LS ACCOUNT 4009 Sales : Trade Promotion (contra revenue)'. To the right, 'PLANNED SPEND' is listed as 2,600.00, 'TOTAL PLANNED SPEND' as 3,600.00, and 'ACCOUNT' as 4009 Sales : Trade Promotion. A checkbox option is present: ANY ITEM SOLD TO CUSTOMER GETS THIS DISCOUNT.

The main section is titled '- iTPM Promotion Plannings • 52 Week Items • 52 Wk Items (Parent)'. It includes a 'VIEW' dropdown set to 'Default View' and buttons for 'New - iTPM Promotion Planning', 'Attach', and 'Customize View'.

EDIT	ID	ITEM	ITEM DISPLAY NAME	UNIT	MORE DISC?	MOP	%	RATE	BASE	INCREMENTAL	% LIFT	REVENUE	REDEMPTION	PLANNED SPEND	EVERYDAY PRICE	MERCH P
Edit	iTPM_PP0668	ACC00001	Merlin 4400 PLUS Phone	Each	No	Bill-Back		1.00	0	0	0.0%	10,000.00	100.0%	100.00		
Edit	iTPM_PP0669	ACC00002	Merlin 4400 Phone	Each	No	Bill-Back	10.0%		0	0	0.0%	10,000.00	100.0%	1,000.00		
Edit	iTPM_PP0670	-BIC (10 items)		Each	No	Bill-Back		1.00	1,000	0	50.0%		100.0%	1,500.00		

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

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

- iTPM Promotion
Test S-03320

Promotion Information

SUBSIDIARY
CG Squared, Inc. : Ho

Update Estimated Quantity More

PROMOTION #
Test S-03320

CUSTOMER
Walmart

Planning records •

UPDATE	PLANNING ID	ITEM	UNIT	MOP	%	▲ RATE	BASE	INCREMENTAL	%LIFT	REVENUE
<input checked="" type="checkbox"/>	iTPM_PP1555	- Acc group A (5 items)	Each	Bill-Back		1.00	1,000	750	0.0%	
<input type="checkbox"/>	iTPM_PP1556	CAB00004	Each	Bill-Back		1.00	50	50	0.0%	

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

Changes are also documented under User Notes.

[Planning](#)
[Allowances](#)
[Estimated Quantity](#)
[Retail Info](#)
[KPI's](#)
[Settlements](#)
[Reports](#)
[Files](#)
[Communication](#)
[Workflow](#)
[System Information](#)
[Accrual](#)

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

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

VIEW: Default 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

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, *iTPM 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

The screenshot shows a summary view of a promotion. At the top, there is a navigation bar with tabs: Planning, Allowances, Estimated Quantity, Retail Info, KPI's, Settlements, Reports, Files, and Communication. Below this, there are two columns of data: 'LS AMOUNT' and 'LS ACCOUNT' on the left, and 'PLANNED SPEND' and 'TOTAL PLANNED SPEND' on the right. The 'PLANNED SPEND' and 'TOTAL PLANNED SPEND' values are both 8,399.72. Below this, there is an 'ACCOUNT' section with the text '4009 Sales : Trade Promotion (contra revenue)'. At the bottom, there is a checkbox labeled 'ANY ITEM SOLD TO CUSTOMER GETS THIS DISCOUNT' which is checked.

The screenshot shows a table of allowances. The table has columns: EDIT, ID, ITEM #, ITEM DESCRIPTION, INACTIVE, CONTRIBUTION CALC?, PRICE LEVEL, IMPACT PRICE, METHOD OF PAYMENT, ALLOWANCE TYPE, UNIT, UNIT PRICE, RATE PER UNIT, % PER UNIT, ALLOW ADDITIONAL DISCOUNTS, ACCOUNT, and COMMENTS. There are two rows of data. The first row has ID 63122, ITEM # ACC00001, and ITEM DESCRIPTION 'Digital Single Line Telephone (4400) for support calls'. The second row has ID 59026, ITEM # ACC00002, and ITEM DESCRIPTION 'Digital Single Line Telephone (4400) for support calls'. The COMMENTS column for the first row contains the text: 'Added Allowance as per item sold by customer from yesterday or last two days Sat Apr 16 2022 20:40:29 GMT-0700 (PDT)'. An arrow points from the checkbox in the previous screenshot to this comment.

EDIT	ID	ITEM #	ITEM DESCRIPTION	INACTIVE	CONTRIBUTION CALC?	PRICE LEVEL	IMPACT PRICE	METHOD OF PAYMENT	ALLOWANCE TYPE	UNIT	UNIT PRICE	RATE PER UNIT	% PER UNIT	ALLOW ADDITIONAL DISCOUNTS	ACCOUNT	COMMENTS
Edit	63122	ACC00001	Digital Single Line Telephone (4400) for support calls	No	No	List Price	100.00	Bill-Back	% Discount	Each	100.00	10.00	10.0%	No		Added Allowance as per item sold by customer from yesterday or last two days Sat Apr 16 2022 20:40:29 GMT-0700 (PDT)
Edit	59026	ACC00002	Digital Single Line Telephone (4400) for support calls	No	No	List Price	100.00	Bill-Back	% Discount	Each	100.00	10.00	10.0%	No	4009 Sales : Trade Promotion (contra revenue)	

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 allowances creates less data inside NetSuite and requires less processing.

- iTPM Promotion Type ← → List Search

Slotting / Free fill

[Edit](#) [Back](#) | [+](#) Actions ▾

Primary Promo Information

PROMOTION TYPE DESCRIPTION Slotting / Free fill	FINANCIAL IMPACT Expense
OTHER REFERENCE CODE	VALID ACCOUNTS 6012 New Distribution
METHODS OF PAYMENT Bill-Back Off-Invoice	DEFAULT ACCOUNT 6012 New Distribution
VALID MERCHANDISING TYPES Other	NUMBER OF DAYS BEFORE AUTOCLOSURE 180

Additional Promo Information

<input type="checkbox"/> SHOW ORDER DATES?	<input type="checkbox"/> BASE DEAL?
<input type="checkbox"/> SHOW PERFORMANCE DATES?	<input type="checkbox"/> REQUIRE ESTIMATED QUANTITY?
<input type="checkbox"/> SHOW AT RETAIL?	<input type="checkbox"/> PLAN INCREMENTAL SEPARATE FROM TOTAL?
<input type="checkbox"/> VALID FOR INDIRECTS?	<input checked="" type="checkbox"/> AVAILABLE
<input checked="" type="checkbox"/> ALLOW SETTLEMENTS WHEN PROMOTION IS ACTIVE?	<input checked="" type="checkbox"/> REQUIRE PROMOTION PERIOD SHARE
<input type="checkbox"/> DO NOT UPDATE LIABILITY BASED ON ACTUALS	DISCOUNT ITEM FOR OFF-INVOICE
<input checked="" type="checkbox"/> APPLY PERCENTAGE ALLOWANCES AS PERCENTAGE DISCOUNTS	<input checked="" type="checkbox"/> AUTO APPROVE L1 IF FUTURE CONDITION?
<input type="checkbox"/> ONLY CREATE KPI AND ALLOWANCE FOR THE FIRST ITEM IN ITEM GROUP?	<input type="checkbox"/> PROCESS PLAN TO EXCLUDE ITEMS THAT WERE NOT SOLD IN THE LAST 52 WEEKS

9. New COPY PROMOTION button

.- iTPM Promotion
2022 all products 10%

Edit | Back | Refresh KPIs | Copy Promotion | Process Plan | Submit | Void | Print | Actions

Copy iTPM Promotion More

Submit | Cancel

Promotion information

SUBSIDIARY OLD
CG Squared, Inc. : Honeycomb US-East

SUBSIDIARY NEW
CG Squared, Inc. : Honeycomb US-East

TITLE/REFERENCE CODE OLD
2022 all products 10%

TITLE/REFERENCE CODE NEW *
2023 promotion, all products get 10%

CUSTOMER OLD
KeHE

CUSTOMER NEW
KeHE

PROMOTION# OLD
1960

PROMOTION# NEW

PROMOTION TYPE OLD
EDLP

PROMOTION TYPE NEW
EDLP

PRICE LEVEL OLD
List Price

PRICE LEVEL NEW
List Price

OTHER REFERENCE CODE OLD

OTHER REFERENCE CODE NEW

DESCRIPTION OLD

DESCRIPTION NEW

LUMPSUM NEW
100.00

LUMPSUM OLD
100.00

ACCOUNT OLD
4009 Sales : Trade Promotion (contra revenue)

ACCOUNT NEW
4009 Sales : Trade Promotion (contra reve

LS ACCOUNT OLD
4009 Sales : Trade Promotion (contra revenue)

LS ACCOUNT NEW
4009 Sales : Trade Promotion (contra reve

ANY ITEM SOLD TO CUSTOMER GETS THIS DISCOUNT

SHIP START OLD
01/01/2022

SHIP START NEW
01/01/2023

SHIP END OLD
12/31/2022

SHIP END NEW
12/31/2023

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*.

.- iTPM Promotion List Search

2023 promotion, all products get 10%

Edit | Back | Refresh KPIs | Copy Promotion | Process Plan | Void | Print | Actions

Promotion Information

SUBSIDIARY	PROMOTION TYPE	CUSTOMER	STATUS	CONDITION
CG Squared, Inc. : Honeycomb US-East	EDLP	KeHE	Draft	Future

CURRENCY
USA

TITLE / REFERENCE CODE
2023 promotion, all products get 10%

PRICE LEVEL
List Price

PROMOTION #
28426

DESCRIPTION

OTHER REFERENCE CODE

Promotion Dates

SHIP DATE - START	SHIP DATE - END
01/01/2023	12/31/2023

LENGTH IN WEEKS - SHIP
52.14

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

LS AMOUNT	LS ACCOUNT	PLANNED SPEND	TOTAL PLANNED SPEND
100.00	4009 Sales : Trade Promotion (contra revenue)	2,000.00	2,100.00

ACCOUNT
4009 Sales : Trade Promotion (contra revenue)

ANY ITEM SOLD TO CUSTOMER GETS THIS DISCOUNT

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

|

Filters

SUBSIDIARY *
CG Squared, Inc. : Honeycomb US-East

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 •

UPDATE	PROMOTION ▲
<input type="checkbox"/>	\$15,099: Future promotion: Alex
<input type="checkbox"/>	2021 EDLP pricing
<input type="checkbox"/>	2022 Plan by revenue (no lift)
<input type="checkbox"/>	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*

Promotion Dates

SHIP DATE - START	SHIP DATE - END	ORDER DATE - START	ORDER DATE - END	PERFORMANCE - START	PERFORMANCE - END
03/01/2022	03/31/2022	03/01/2022	03/31/2022	03/01/2022	03/31/2022
LENGTH IN WEEKS - SHIP		LENGTH IN WEEKS - ORDER		LENGTH IN WEEKS - PERFORMANCE	
4.43		4.43		4.43	

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

LS AMOUNT 501.00 LS ACCOUNT 4009 Sales : Trade Promotion (contra revenue)

PLANNED SPEND 0.00 TOTAL PLANNED SPEND 501.00 ACCOUNT 4009 Sales : Trade Promotion (contra revenue)

ANY ITEM SOLD TO CUSTOMER GETS THIS DISCOUNT

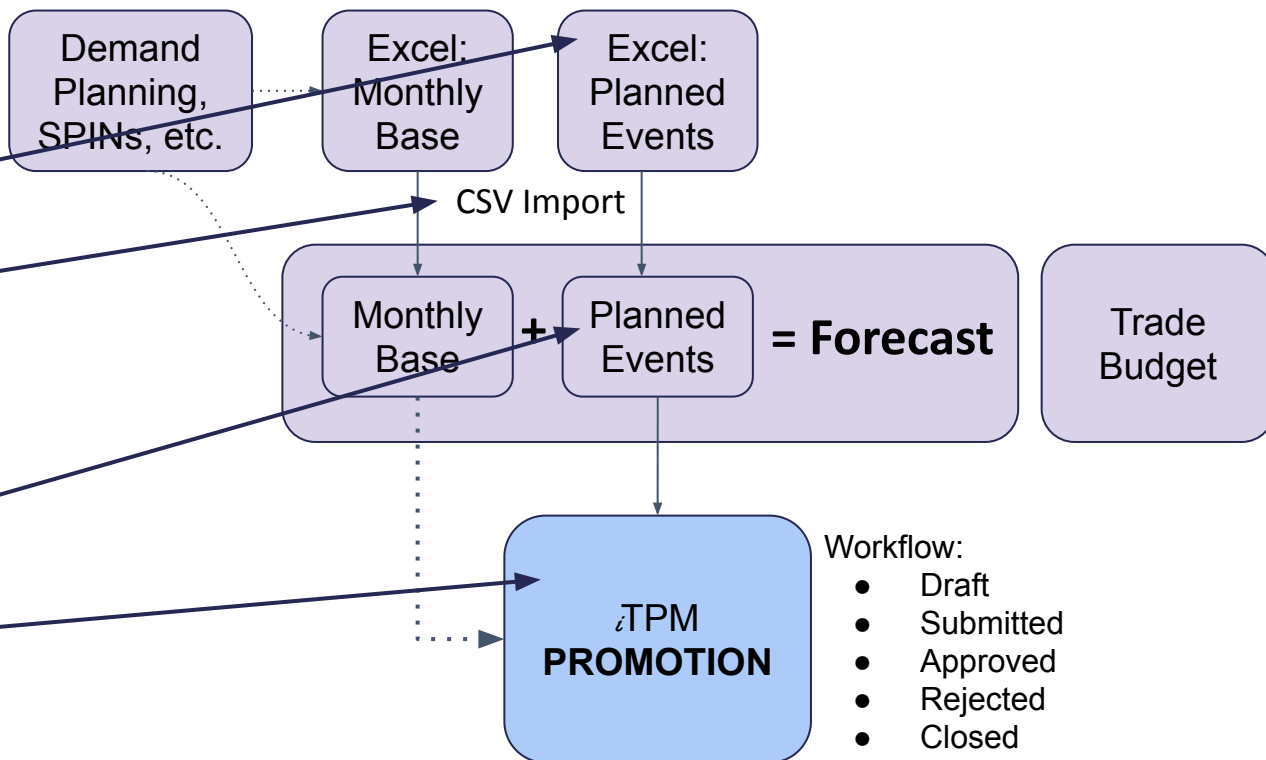
- iTPM Promotion Plannings • 52 Week Items 52 Wk Items (Parent) **Monthly forecast**

EDIT	CUSTOMER ▲	YEAR	ITEM	UNIT OF MEASURE	JAN:UNITS-1	FEB:UNITS-2	MAR:UNITS-3	APR:UNITS-4	MAY:UNITS-5	JUN:UNITS-6	JUL:UNITS-7	AUG:UNITS-8	SEP:UNITS-9	OCT:UNITS-10	NOV:UNITS-11	DEC:UNITS-12
Edit	Albertsons / Safeway	2,022	ACC&BIC Group (20 Items)	Case(12b/48e)	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
Edit	Albertsons / Safeway	2,022	ACC00004	Case(12b/48e)	100	100	100	100	100	100	100	100	100	100	100	100

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.



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%

Benefits:

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

- iTPM Plan List Search Customize

Example May bill-back

Save Cancel Change ID Actions

Plan Information

SUBSIDIARY * CG Squared, Inc. : Honeycomb US-East	CUSTOMER * Walmart	PROMOTION TYPE * Scans (with only one GL acct)	TITLE / REFERENCE CODE * Example May bill-back	DESCRIPTION CSV import from Excel, create an Event Plan, then Auto-create or update the iTPM Promotion
PLAN # PROM # PLANNING # 716 28427 2153	PRICE LEVEL List Price	APPROVAL STATUS	OTHER REFERENCE CODE	OWNER Clark Koozer
PROCESSING STATUS SUCCESS	PROCESSING NOTES	<input type="checkbox"/> VALIDATE DATA? <input type="checkbox"/> CHANGED?	<input checked="" type="checkbox"/> GROUP PLANS WITH THIS TITLE? <input type="checkbox"/> CREATE OR UPDATE PROMOTION? <input type="checkbox"/> RUN PROCESS PLAN IN PROMOTION?	

Plan Dates

YEAR * 2,022	PERIOD START * May	SHIP DATE START 05/01/2022	ORDER DATE START 05/01/2022	PERFORMANCE START 05/01/2022
WEEKS PERFORMANCE 4	SHIP DATE END 05/30/2022	ORDER DATE END 05/30/2022	PERFORMANCE END 05/30/2022	

Discounts and Lump sum (Enter either percent discount OR rate per unit)

ITEM * ACC00002	ITEM DISPLAY NAME Merlin 4400 Phone	ITEM PRICE 100.00	% DISCOUNT 10.0%	% REDEMPTION 100.0%	PLAN SPEND 2,630.00
UNIT OF MEASURE * Each	LUMP SUM 200.00	METHOD OF PAYMENT * Bill-Back	RATE 0.00	<input type="checkbox"/> MORE DISCOUNTS? <input type="checkbox"/> ALL ITEMS GET THIS DISCOUNT?	PLAN TOTAL SPEN 2,830.00

Estimated Quantity (Enter any two: base and lift, or Revenue and lift, or base and incremental)

BASE 202	INCREMENTAL 0	% LIFT 30.0%	REVENUE 0.00
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Retail Info (Optional)

EVERDAY PRICE	MERCH PRICE	% ACV	ACTIVITY
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Base Forecast Workflow System Notes User Notes

Monthly Forecast • Unit Forecast • Revenue Forecast • Price Forecast •

EDIT	CUSTOMER	ITEM	YEAR	01: UNITS	02: UNITS	03: UNITS	04: UNITS	05: UNITS	06: UNITS	07: UNITS	08: UNITS	09: UNITS	10: UNITS	11: UNITS	12: UNITS
Edit	Walmart	ACC00004	2,022	200	200	200	200	200	200	200	200	200	200	200	200

12. Create promotions from simplified Excel promotion planner

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

- iTPM Plan
Example May bill-back

Save Cancel Change ID Actions

Plan Information

SUBSIDIARY * CG Squared, Inc. : Honeycomb US-East
 CUSTOMER * Walmart
 PROMOTION TYPE * Scans (with only one GL acct)
 TITLE / REFERENCE CODE * Example May bill-back
 DESCRIPTION CSV import from Excel, create an Event Plan, then Auto-create or update the iTPM Promotion

PLAN # 716 PROM # 28427 PLANNING # 2153
 PRICE LEVEL List Price
 APPROVAL STATUS
 OTHER REFERENCE CODE
 GROUP PLANS WITH THIS TITLE?
 CREATE OR UPDATE PROMOTION?
 RUN PROCESS PLAN IN PROMOTION?
 OWNER Clark Koozer

PERFORMANCE START 05/01/2022
 PERFORMANCE END 05/30/2022

% REDEMPTION 100.0% PLAN SPEND 2,630.00
 MORE DISCOUNTS? PLAN TOTAL SPEND 2,830.00
 ALL ITEMS GET THIS DISCOUNT?

- iTPM Promotion
Example May bill-back

Edit Back Refresh KPIs Copy Promotion Process Plan Submit Void Actions

Promotion Information

SUBSIDIARY CG Squared, Inc. : Honeycomb US-East
 PROMOTION TYPE Scans (with only one GL acct)
 CUSTOMER Walmart
 STATUS Draft CONDITION Completed

CURRENCY USA
 TITLE / REFERENCE CODE PROMOTION # Example May bill-back 28427
 PRICE LEVEL List Price
 DESCRIPTION CSV import from Excel, create an Event Plan, then Auto-create or update the iTPM Promotion

Promotion Dates

SHIP DATE - START SHIP DATE - END 05/01/2022 05/30/2022
 PERFORMANCE - START PERFORMANCE - END 05/01/2022 05/30/2022
 LENGTH IN WEEKS - SHIP 4.29
 LENGTH IN WEEKS - PERFORMANCE 4.29

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

LS AMOUNT 200.00 LS ACCOUNT 4009 Sales : Trade Promotion (contra revenue)
 PLANNED SPEND 5,260.00 TOTAL PLANNED SPEND 5,460.00 ACCOUNT 4009 Sales : Trade Promotion (contra revenue)
 ANY ITEM SOLD TO CUSTOMER GETS THIS DISCOUNT

- iTPM Promotion Plannings 52 Week Items 52 Wk Items (Parent) Monthly forecast

VIEW - iTPM PROMOTION PLANNING
 Default View

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	EVERYDAY PRICE	MERCH PRICE	ACV W/DISPLAY	ACTIVITY	PROCESSED?	PROCESSING RE
Edit	iTPM_PP2153	ACC00002	Merlin 4400 Phone	Each	No	Bill-Back	10.0%	0.00	202	0	30.0%	0.00	100.0%	2,630.00					Yes	From plan 716

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

Update Schedule

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

iTPM 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	Winter 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