

iTPM

24.1.2

Spring 2024 Update Release Notes



BFN Certified every 6 months.

March 2024

New Features in iTPM 24.1.2

New features that make it **easier to change approved promotions:**



Promotion Planning

1. S-04592: New **Modify button** for approved promotions
2. S-04595: Now **Add new items** and item groups to approved promotions
3. S-04593: New **Change Pending button**
4. S-04601: New **Change Pending reminder**
5. S-04598: New **Change Pending banner**
6. S-04597: New **APPROVE ALL / REJECT ALL** for changes to approved promotions
7. S-04205: **Simplified COPY PROMOTION** form.

Note: Go to Technical Release notes for 24.1.2 at www.i-TPM.com/admin-training-resources to see a list of the 50+ changes to iTPM in 24.1.2

- iTPM Promotion

Example MODIFY of promotion with many items

Refresh KPIs Copy Promotion Quick Edit **Modify** End Promotion

1. MODIFY button for approved promotions

Benefits: One click to enter changes to an approved promotion. (Extra role permissions to see MODIFY button)
 No change to the promotion until changes are approved.
 Faster and fewer mouse clicks than 'Void-or-change', Back-to-Draft, and Re-submit.

Modify Promotion More

PROMOTION #
Example MODIFY of promotion with many items

CUSTOMER
Ahold

CHECK THIS BOX TO UPDATE LUMP SUMP

LS AMOUNT
1,000.00

Planning records

UPDATE	PLANNING ID	ITEM	UNIT	MOP	%	RATE	BASE	INCREMENTAL	%LIFT	REVENUE	REDEMPTION	COMMENT
<input checked="" type="checkbox"/>	ITPM_PP3455	CAB00004	Each	Bill-Back	12.0%	0.00	0	0	0		100.0%	Changed rate
<input checked="" type="checkbox"/>	ITPM_PP3454	CAB00003	Each	Bill-Back	12.0%		0	0	0		100.0%	Corrected rate
<input type="checkbox"/>	ITPM_PP3453	CAB00002	Each	Bill-Back	10.0%	0.00	0	0	0		100.0%	

iTPM Promotion Plannings • 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 RESPONSE	PLANNING STATUS
Edit	ITPM_PP3455	CAB00004	Storage Cabinet Wood - Honey Oak	Each	No	Bill-Back	12.0%	0.00	0	0	0.0%		100.0%	0.00			0.0%	Yes			Change Pending
Edit	ITPM_PP3454	CAB00003	Bedford 3-Drawer File Cabinet Steel - Black	Each	No	Bill-Back	12.0%	0.00	0	0	0.0%		100.0%	0.00			0.0%	Yes			Change Pending

2. Add items to approved promotions

Benefits:

- One click to add item or item groups.
- (Extra role permission required)
- No change to the promotion until new items are approved

Planning Allowances Estimated Quantity Retail Info KPI's Settle

LS AMOUNT 1,000.00 LS ACCOUNT 4009 Sales : Trade Promotion (contra revenue)

- iTPM Promotion Plannings • Monthly forecast •

VIEW - iTPM PROMOTION PLANNING
Default View

New - iTPM Promotion Planning Attach

EDIT	ID	ITEM	ITEM DISPLAY NAME	UNIT	MORE DISC?
Edit	iTPM_PP2964	- Acc group A (6 items)		Each	No

- iTPM Promotion Planning

List Search More

Save Cancel

Promotion Information

ITPM PROMOTION Example approved promotion ITPM PROMOTION TYPE MCB (direct accounts)

Planning Data

ACCOUNT 4009 Sales : Trade P...ion (contra revenue)	UNIT * Each	BASE * 100	EST. EVERYDAY PRICE
ITEM * CAB00002	MOP * Bill-Back	INCREMENTAL * 0	EST. MERCH PRICE
ITEM DISPLAY NAME 4-Drawer 30" Lateral File Cabinet Steel - Black	%	% LIFT 0.0%	EST. % ACV WITH DISPLAY 0.0%
<input type="checkbox"/> INACTIVE	RATE 1.00	REVENUE	ACTIVITY
	<input type="checkbox"/> ADDITIONAL DISCOUNTS?	REDEMPTION * 100.0%	

- iTPM Promotion
 Example MODIFY of promotion with many items

Refresh KPIs Copy Promotion Quick Edit Modify **Change Pending** End Promotion

3. CHANGE PENDING button in approved promotions

Benefits:

- Quick view of only the planning rows that have a pending change.
- No changes to the approved promotion until changes are pending approval.
- Faster than the Void-or-Change, Back-to-Draft, and re-submit workflow.

Change pending More

PROMOTION #
Example MODIFY of promotion with many items

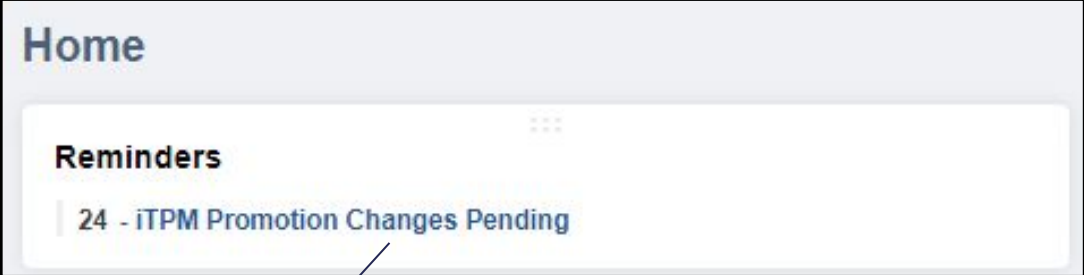
CUSTOMER
Ahold

See the **old** value next to the requested **new** value

Planning records •																					
PLANNING ID	ITEM	OLD UNIT	NEW UNIT	MOP	OLD %	NEW %	OLD RATE	NEW RATE	OLD BASE	NEW BASE	OLD INCREMENTAL	NEW INCREMENTAL	OLD %LIFT	NEW %LIFT	OLD REVENUE	NEW REVENUE	OLD REDEMPTION	NEW REDEMPTION	COMMENT	▲ PLAN SPEND	OLD PLAN SPEND
ITPM_PP3445	ACC00002	Each	Each	Bill-Back	10.0%	12.0%	0.00	0.00	10	10	0	0	0	0			100.0%	100.0%	Changed rate	120.00	
ITPM_PP3449	ACC00008	Each	Each	Bill-Back	0.0%	10.0%		0.00	0	0	0	0	0	0			100.0%	100.0%		0.00	
ITPM_PP3453	CAB00002	Each	Each	Bill-Back	0.0%	10.0%		0.00	0	0	0	0	0	0			100.0%	100.0%		0.00	
ITPM_PP3454	CAB00003	Each	Each	Bill-Back	0.0%	12.0%		0.00	0	0	0	0	0	0			100.0%	100.0%	Corrected rate	0.00	
ITPM_PP3455	CAB00004	Each	Each	Bill-Back	10.0%	12.0%	0.00	0.00	0	0	0	0	0	0			100.0%	100.0%	Changed rate	0.00	

4. Change Pending dashboard reminder

Benefits: Quickly see all the changes requested for approved promotions that are pending review and approval.



- iTPM Promotion Changes Pending: Results

[Return To Criteria](#) [Edit this Search](#)

FILTERS

STYLE
Normal

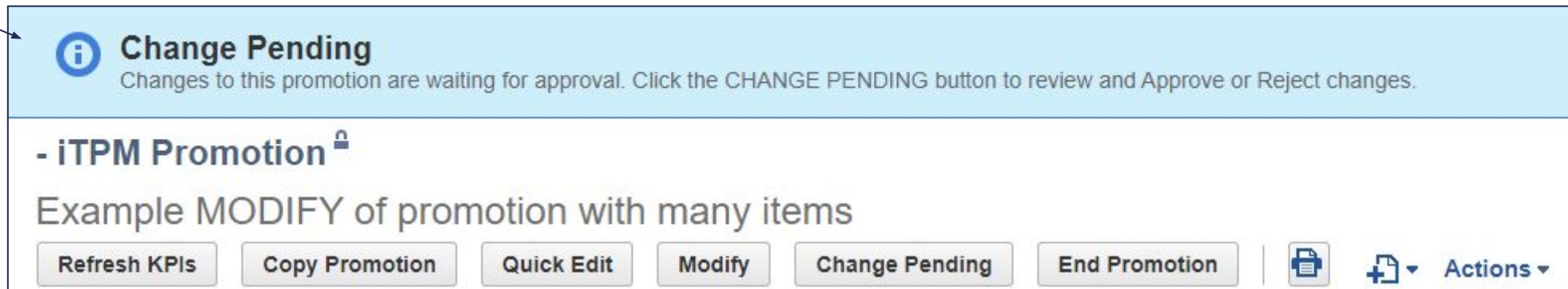
EDIT

EDIT VIEW	INTERNAL ID	PROMOTION #	PLANNING ID	OWNER	ITEM	UNIT	OLD MOP	NEW MOP	OLD %	NEW %	OLD RATE	NEW RATE	OLD BASE	NEW BASE
Edit View	1524	2390	18test	Priyanka Balusu	- 100+ item group	Each(12)	Bill-Back	Bill-Back	0.0%	0.0%		1.00	0	100
Edit View	2283	29750	CSV import July 4	iTPM Demo	ACC00002	Each	Bill-Back	Bill-Back	0.0%	0.0%	11.00	13.00	200	200

5. Change Pending banner on approved promotions.

Benefits:

- Banner alerts you that there is a change to the promotion that is awaiting approval.
- Click the CHANGE PENDING button to see the change, or look for "Change Pending" in the planning grid in the "Planning Status" column.



Change Pending
Changes to this promotion are waiting for approval. Click the CHANGE PENDING button to review and Approve or Reject changes.

- iTPM Promotion

Example MODIFY of promotion with many items

Refresh KPIs Copy Promotion Quick Edit Modify Change Pending End Promotion | Print + Actions



ACTIVITY	PROCESSED?	PROCESSING RESPONSE	PLANNING STATUS ▾
	Yes		Change Pending

6. Approve ALL, Reject ALL buttons.

- iTPM Promotion ^u

Example MODIFY of promotion with many items

Refresh KPIs Copy Promotion Quick Edit Modify **Change Pending** End Promotion

Benefits:

- One click to approve or reject all changes (if your role has permissions to approve changes).
- No change to the promotion until changes are approved.
- Faster and fewer mouse clicks than 'Void-or-change', Back-to-Draft, and Re-submit.

See the **old** value next to the requested **new** value

Change pending More

Cancel **Approve All** Reject All

PROMOTION # Example MODIFY of promotion with many items CUSTOMER Ahold

Planning records +

PLANNING ID	ITEM	OLD UNIT	NEW UNIT	MOP	OLD %	NEW %	OLD RATE	NEW RATE	OLD BASE	NEW BASE	OLD INCREMENTAL	NEW INCREMENTAL	OLD %LIFT	NEW %LIFT	OLD REVENUE	NEW REVENUE	OLD REDEMPTION	NEW REDEMPTION	COMMENT	* PLAN SPEND	OLD PLAN SPEND
ITPM_PP3445	ACC00002	Each	Each	Bill-Back	10.0%	12.0%	0.00	0.00	10	10	0	0	0	0			100.0%	100.0%	Changed rate	120.00	
ITPM_PP3448	ACC00006	Each	Each	Bill-Back	0.0%	10.0%		0.00	0	0	0	0	0	0			100.0%	100.0%		0.00	
ITPM_PP3453	CAB00002	Each	Each	Bill-Back	0.0%	10.0%		0.00	0	0	0	0	0	0			100.0%	100.0%		0.00	

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 RESPONSE	PLANNING STATUS
Edit	ITPM_PP3486	CAB00003	Bedford 3-Drawer File Cabinet Steel - Black	Each	No	Bill-Back	10.0%		0	0	0.0%		100.0%				0.0%	No			Approved
Edit	ITPM_PP3487	CAB00002	4-Drawer 30" Lateral File Cabinet Steel - Black	Each	No	Bill-Back	10.0%		0	0	0.0%		100.0%				0.0%	No			Approved

.- iTPM Promotion
 2022 all products 10%

7. Simplified COPY PROMOTION button form.

Benefits: Fewer mouse clicks when changing promotion types.

GL account is no longer a drop-down menu in the copy promotion form.

If the GL account is different in the new promotion type, iTPM uses the default GL in the new promotions.

Copy iTPM Promotion More

Promotion information

SUBSIDIARY OLD CG Squared, Inc. : Honeycomb US-East	PRICE LEVEL NEW List Price	LUMPSUM NEW 100.00
SUBSIDIARY NEW CG Squared, Inc. : Honeycomb US-East	OTHER REFERENCE CODE OLD	ACCOUNT OLD 4009 Sales : Trade Promotion (contra revenue)
TITLE/REFERENCE CODE OLD 2022 all products 10%	OTHER REFERENCE CODE NEW	ACCOUNT NEW 4009 Sales : Trade Promotion (contra reve
TITLE/REFERENCE CODE NEW * 2023 promotion, all products get 10%	DESCRIPTION OLD	LS ACCOUNT OLD 4009 Sales : Trade Promotion (contra revenue)
CUSTOMER OLD KeHE	DESCRIPTION NEW	LS ACCOUNT NEW 4009 Sales : Trade Promotion (contra reve
CUSTOMER NEW KeHE	LUMPSUM OLD 100.00	<input type="checkbox"/> ANY ITEM SOLD TO CUSTOMER GETS THIS DISCOUNT
PROMOTION# OLD 1960		SHIP START OLD 01/01/2022
PROMOTION# NEW		SHIP START NEW 01/01/2023
PROMOTION TYPE OLD EDLP		SHIP END OLD 12/31/2022
PROMOTION TYPE NEW EDLP		SHIP END NEW 12/31/2023
PRICE LEVEL OLD List Price		

Update Schedule

The next update is tentatively scheduled for Summer **2024**.

iTPM Anticipated Releases	Anticipated Date Generally Available*
'Minor' Updates 24.1.x	As needed. Release date and enhancements may change based on client needs and requests.
'Major' Release 24.2.1	Summer 2024. 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 for all roles are available online at www.i-TPM.com/training-resources