*i*TPM

24.2 .2

Fall 2024 Update   Release Notes

BFN Certified every 6 months.

New Features in ¿TPM 24.2.1 &.2

Deduction Management

1. S-04819: Add "*Other reference 2*" in the promotion list when resolving deductions.

Promotion Planning

2. S-04979: Create a new custom NetSuite *¿TPM Broker Partner* center.

Accruals

3. S-**04834**: Use item attributes as an additional filter for period-based accruals.

Analytics

4. S-05018 Link the promotion planning record to all related promotion records for easier NetSuite workbook analysis.

Applying Off -invoice

5. S-04933 Header Discounts & Surcharges.
6. S-04869 Prevent missed OI on sales orders for "*all items get this discount*" promotions.
7. S-04882   Add the promotion type as a column in the *Overlapping Promotions* sales order report.
8. S-04874: Support Kits in promotions, and items with no unit-of-measure.

Publishing 2024.2.1

9. S-02719 Comply with new NetSuite mandates for SuiteApps.
10. S-04933 Prepare for header discounts in 2024.2.2.

Note: Go to Technical Release notes for 24.2.2 at   www.i-TPM.com/admin-training-resources to see a list of the 50+ changes to ¿TPM in 24.2.2

1. "*Other reference code 2*" is now in the settlement promotion list

Benefits: Fewer mouse clicks to find a deduction in the list

2. New custom NetSuite *iTPM Broker Partner* center

Benefits: Limit *i*TPM broker partner access to only see information they need for promotion planning.

NetSuite Global search is turned off.

All other center tab menus removed
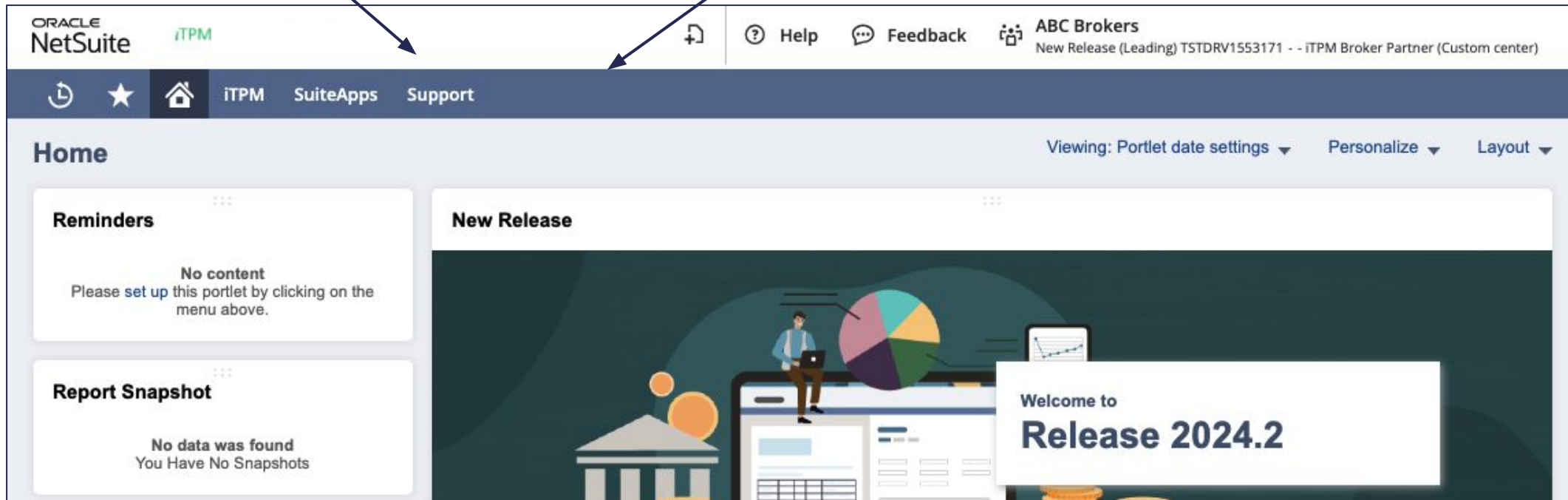
3. Option to use item attribute filtering for period-based accruals

Benefits:
Limit period-approvals to specific items based on an attribute that is stored in your NetSuite item records.

If the "*Include all items*" checkbox is checked, or if there are no item attributes are selected, accruals are created for every item in the overlapping invoice.

Details for the one-time item attribute configuration is in the *Accrual User Guide*, section 3.1.
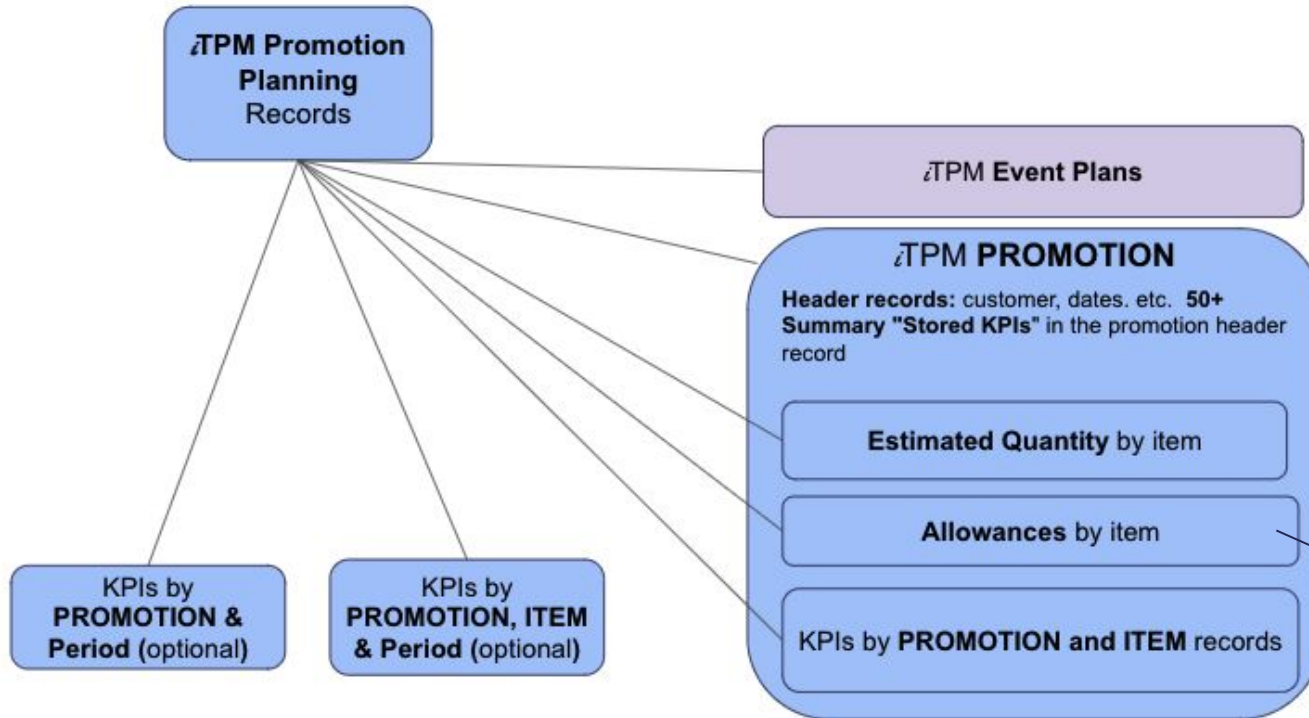
In NetSuite, *iTPM -> Help -> Accruals*

4. Planning record now links directly to all related promotional records for analysis

Benefits: All the related information in a prommotion can be reported the way it was planned in a NetSuite Workbooks using only 1 NetSuite dataset.

The example below shows the allowance for item *BIC00011* is part of the NetSuite item group *"- BIC (11 items)"* in the i*TPM Promotion Planning* record.

	EDIT	ID	ITEM	ITEM DESCRIPTION	PRICE LEVEL	METHOD OF PAYMENT	ALLOWANCE TYPE	UNIT	UNIT PRICE	RATE PER UNIT	% PER UNIT	ALLOW ADDITIONAL DISCOUNTS	ACCOUNT	COMMENTS	IMPACT PRICE UOM	IMPACT PRICE	ITEM NAME ▲
	Edit	367031	BIC00011	Summer Item - Bike	List Price	Bill-Back	Rate Per UOM	Each	150.00	1.00	0.67%	No	4009 Sales : Trade Promotion (contra revenue)		Each	150.00	-BIC (11 items)
	Edit	367027	CAB00001	2-Drawer Lateral File Cabinet Steel - White	List Price	Bill-Back	Rate Per UOM	Each	323.50	1.00	0.31%	No	4009 Sales : Trade Promotion		Each	323.50	-CAB (4 items)

5. Option: Header Discounts & Surcharges

Benefits: Fewer rows in the sales order compared to the *i*TPM off-invoice method-of-payment.

*i*TPM automatically adds the subtotal to the sales order.

Unit-of-measure conversion factor between allowance and sales order is always 1.0 for header discounts and surcharges.

Limitation: *i*TPM version 24.2.2 only supports one *header discount* and one *header surcharge* per sales order.

6. Prevent missed OI on sales orders for "*all items get this discount*"

Benefits: No missed off-invoice discounts the first time new items are sold to a customer.

New items are automatically added to the promotion.

7. Promotion ype in the Overlapping Promotions reports

Benefits: Fewer mouse clicks to understand what promotions overlapp the sales order.

8. Support for Kits and item with no unit-of-measure in promotions.

Benefits: Include Kits in *i*TPM promotions.

When the item does not have a unit-of-measure, there is no conversion between the allowance unit-of-measure and the sales order unit of measure.

- *i*TPM assumes a conversion factor of 1.0.
- The allowance discount in the promotion is the same as the sales order.
- No impact for percent discounts.
- **Warning: Review rate-per-unit discounts as they may not be correct.**

9. Release 24.2.1: Changes to comply with new NetSuite SuiteApp mandates

Benefits: *i*TPM will continue to work, even after updating to the new version of NetSuite and when NetSuite makes changes to their platform.

Example notification from NetSuite on May **13**, 2024 to SDN partners for *i*TPM compliance starting May **15**, 2024.

New Validation Check for Hide In SuiteBundle Preference

Hello SDN Partner,

Some SuiteApps and SuiteBundles may include script files that are marked as Hide in SuiteBundle but must be accessed in the browser, such as client or library scripts. Enablement of the Hide in SuiteBundle preference for this type of file is not a valid configuration.

What is Changing?

As of May 15, 2024, client script files in the File Cabinet that have the Hide in SuiteBundle preference enabled will receive a validation error on creation or update. Client script files that do not have the Hide in SuiteBundle preference enabled but include references to files, such as library files, with the preference enabled will also receive an error. This validation check will occur both in the UI and in SuiteCloud tools. In the UI, the validation check will occur on record save for file records as well as custom forms and script records with script files attached. In SuiteCloud tools, the validation error will occur when you run either validation or deployment from your IDE or in the CLI.

10. Release 24.2.1: Prepare ¡TPM for version 24.2.2 enhancements

Benefits: New features were beta-tested in client sandboxes before release in 24.2.2

- New "*Header discount*" and "*Header Surchage*" MOPs.
- "*Header Level Discount?*" checkbox added to the promotion type.

- Item Attribute added to the Period Accrual setup form. (See slide 5 for screenshot)

Update Schedule

The next update is tentatively scheduled for Winter **2025**.

¿TPM Anticipated Releases	Anticipated Date Generally Available*
'Minor' Updates 24.2.x	As needed. Release date and enhancements may change based on client needs and requests.
'Major' Release **25.1**.1	Winter 2025. 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