# Integrated Trade Promotion Management

Built for ORACLE NetSuite

Native SuiteApp

# User Guide: Promotions

## October 2024

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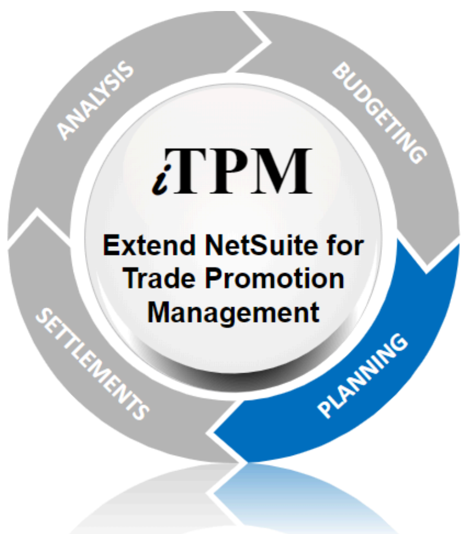


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# Table of Contents

**Helpful Hint:** When viewing this as a PDF, click on the topic or page number to go directly to that section. To get back to the Table of Contents, click on *User Guide: Promotion Planning* at the top of the page. Also available at the bottom of each page: *Quick Reference: iTPM PROMOTIONS*

**Helpful hint:** This user manual is written with the assumption that *i*TPM users are already familiar with NetSuite and have received basic NetSuite training on navigation and features.

If you are new to NetSuite, first read the ***NetSuite Basics User Guide***, located at www.i-TPM.com/promotion-planning

# Quick Reference: *i*TPM PROMOTIONS

**HELP!** Email questions & issues to support@cgsquared.com

| Promotion CONDITION based on dates | Promotion Workflow: *YOU control Deal STATUS* | Method of Payment (MOP) |
|---|---|---|
| **Future**: Promotion hasn't started.<br>**Active**: Promotion is running.<br>**Completed**: Promotion is over.<br>You don't control this.<br>**Condition is calculated** using ship dates. | **Draft**: Submit *Drafts* for approval.<br>**Pending** Approval: Deal waiting for approval.<br>**Approved** Official promotion.<br>**Rejected**: Deal wasn't approved.<br>**Voided**: VOID, then **Back to Draft to change, re-submit**<br>**Closed**: No more settlements expected. | **Billback**: Allowances paid sometime AFTER the transaction.<br>**Off-invoice**: Allowances applied AND visible on the order.<br>**Net-bill**: Allowances applied but NOT visible on the order. |

**Steps to create NEW promotions:** **Also** Mass Copy Promotions **or** COPY individual PROMOTIONS (*Actions-> Make Copy*)

1. New Promotion: Click on ***iTPM -> Promotions -> List -> New***
2. Who gets this promotion? Under Promotion Information, select **Customer** & More:
   **A**: Select / review the **subsidiary,** then select a **promotion type**:
   **B**: **Enter a title / reference code** for your promotion.
   **C**: **What customer**? Enter the first few letters of the customer name, select a customer, then review the default price level.
3. When is this promotion? Under Promotion Dates **Enter Start and end ship dates**. Optional: Order & Performance dates
4. Any Lump Sum? (Optional) Under Planning **Enter the fixed cost**
5. What item(s) will get allowances, and how much will you sell? Planning
   **Select item or item group** and enter the following information

   ----------------- What Allowances? -----------------------------
   * Allowance **Unit-of-Measure** i.e. Case, each, etc.
   * **Method of Payment (Off-invoice, bill-back, net-bill?)**
   * Enter **% discount** ***OR*** allowance per unit

   --------------- How much will you sell? -----------------------
   * Enter Base in units and % lift - or -
   * Enter Revenue and % lift - or -
   * Enter your estimated base and incremental quantities

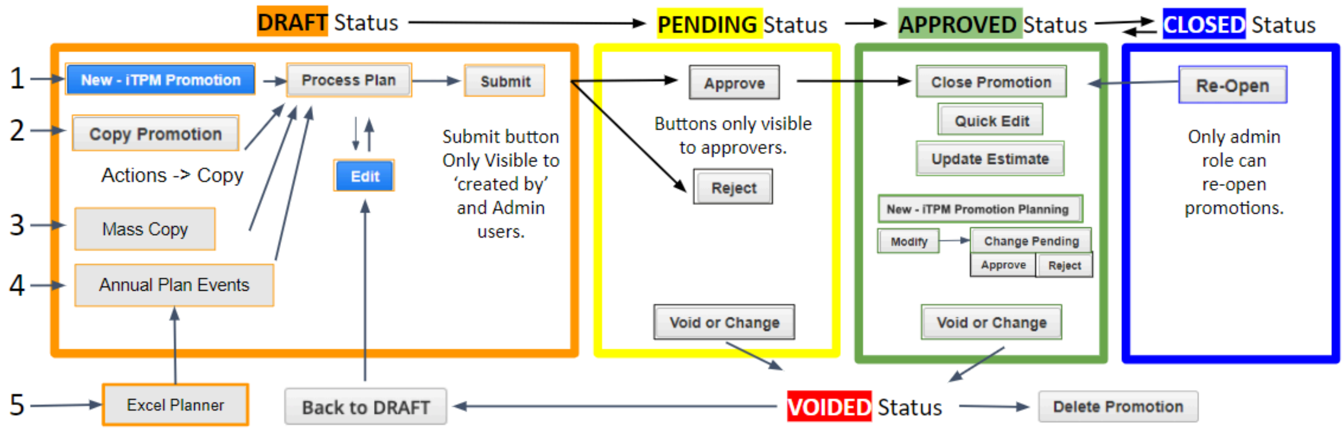
   ✔ Add to add an item or item group. Save ▼ when done. Edit to make changes directly in any row and cell
6. Click Process Plan when you are done adding and/or editing all your items and/or item groups to your promotion.
   PROCESS PLAN will validate your data, and expand your item groups to items. ***Process Plan* can take up to 15 minutes.**
   If you don't click the Process Plan button, *i*TPM will automatically run it overnight.
7. Review Is my estimated quantity reasonable? Under Planning *Last 52 wk items*, Reports, look at *Last 52 weeks*.
   Any duplicates? Under Overlapping Promotions, confirm all overlapping allowances and promotions are correct.
   Add Notes, Attachments & More Use the Communication subtab to add comments and attach electronic documents.
8. SUBMIT for approval? If not, edit, back to #5, and PROCESS PLAN again. If the promotion is ready, click on the Submit button.

Find Promotions in a List, ***iTPM -> Promotions -> List*** … then click **VIEW** or the promotion ID to review the promotion.
True up / down estimated spend in approved promotions. Quick Edit for minor changes to the promotion.
Add items or MODIFY **approved** promotions. CHANGE PENDING to view and/or approve **changes to approved promotions**.
How to copy a promotion: COPY PROMOTION Mass Copy promotions forward to next month, next quarter, or next year.
When **VIEWING** a promotion, workflow includes: **EDIT** SUBMIT APPROVE / REJECT VOID Back-to-Draft CLOSE REOPEN
Calendar View report : ***iTPM -> Promotions -> Calendar Summary*** Advanced: Create Promotions using CSV import

**Analyze & Compare Promotions:** **Go to** *-iTPM -> Promotions -> Comparison Summary* **or** *-iTPM -> Promotions -> Calendar Summary*

| Promotion Spending KPIs | Estimated | Latest Estimate | Expected Liability | Net Liability | Actual |
|---|---|---|---|---|---|
| | What you THINK **will happen.** | What is **most likely** to happen. | **Expected cost as of today**, including **paid and unpaid** amounts. | **What you owe** but haven't paid. | What has happened that's **been paid or resolved as of today**. |

# 1.0 Get Started: Promotion Workflow




Note: Promotion workflow and visibility of these buttons are controlled by NetSuite role permission and promotion condition.

**NEW PROMOTION: Use one of these 5 ways to create your new promotion:**

1. ***iTPM -> Promotions -> List -> New***
2. View an existing promotion, then use the ***COPY PROMOTION*** button.
3. ***iTPM -> Promotions -> Mass Copy***
4. ***iTPM -> Annual Plan -> Plan Events*** (Details in the Annual Planner User Guide)
5. ***CSV Import events from an Excel Spreadsheet*** (Details in the Annual Planner User Guide

**DRAFT Status:**

- ***EDIT*** your promotion if necessary to make changes. Planned Spend is calculated when you click ***SAVE.***
- ***PROCESS PLAN*** to validate and expand your plan to allowances, estimated quantity and retail info subtabs. (This can take up to 15 minutes.)
- ***SUBMIT*** your promotion for approval
  No submit button? Look for *Process Plan* messages under the *Planning* subtab (last column in grid)

**PENDING APPROVAL Status**

- Someone will ***APPROVE** or **REJECT*** your promotion… or your promotion may be auto-approved.

**APPROVED status**

- When promotions become active or completed, promotions are available to resolve deductions.
- Need to update the volume estimate? Use the ***UPDATE ESTIMATE*** button.
- Request changes to the promotion using the ***MODIFY*** button.
- Use the ***New iTPM Promotion Planning button*** to add item or item groups to the promotion.
- Review changes pending approval with the ***CHANGE PENDING*** button.
- With appropriate role permissions, ***Approve ALL or Reject ALL changes*** to the approved promotion.
- Use the promotion ***KPIs*** to review deductions and claims matched to each promotion:

**REJECTED Status**

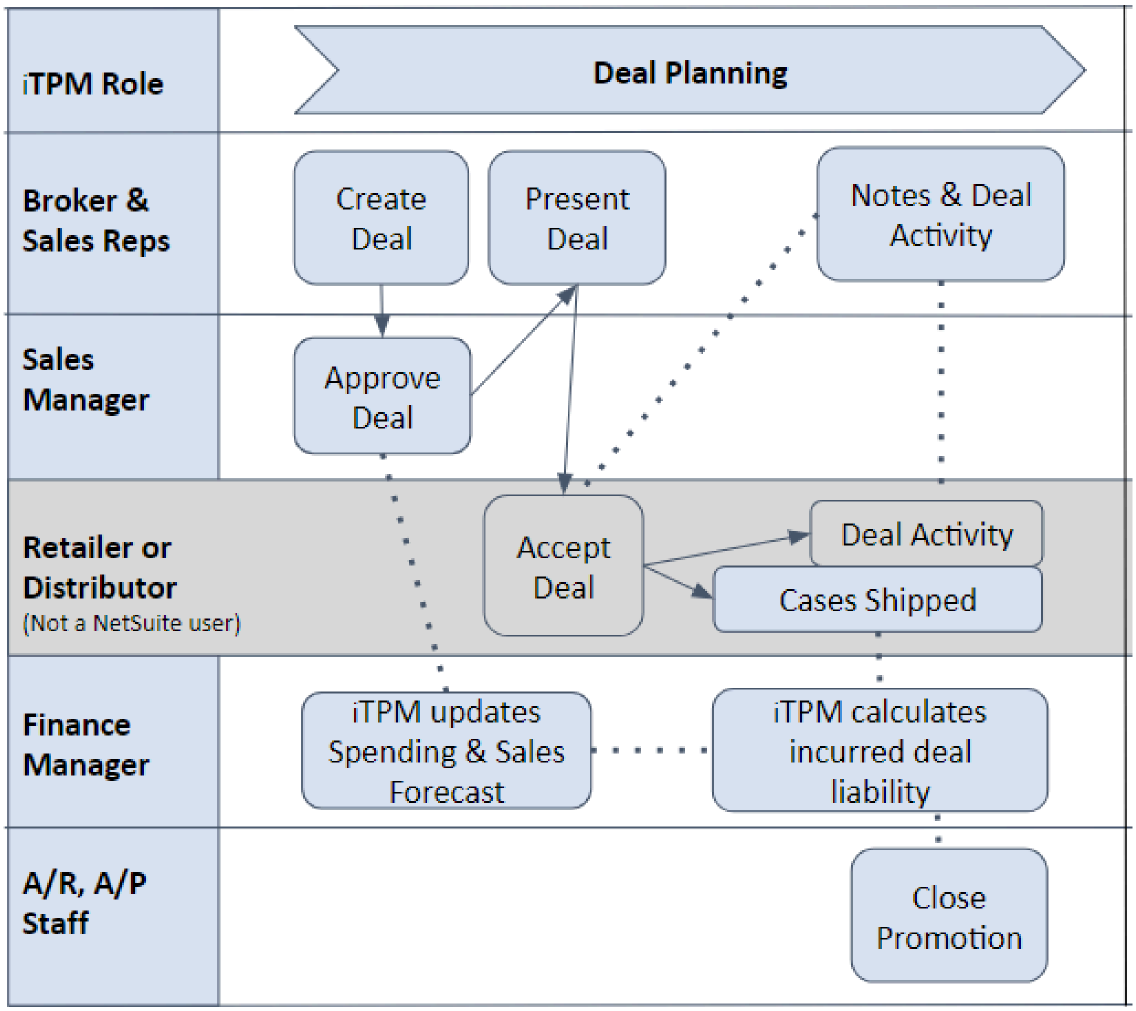
- Use ***BACK-TO-DRAFT*** button to change and re-submit your promotion.

**CLOSED status**

- ***CLOSE PROMOTION*** when you think all settlements and claims have been processed. This will 'release' any unpaid Net Liability for this promotion.
- Optional: ***RE-OPEN*** promotion if you get a claim or deduction after you closed the promotion.

## 1.1 iTPM workflow by role

Use iTPM to plan and track your promotions. Below is the workflow by role for planning and managing trade promotions **where trade promotion is an expense**:




**What is Your Role in Trade Promotion Management? Examples below:**

| | |
|---|---|
| **Account Managers:** | Create and submit your promotions for approval. |
| | Attach electronic documentation and notes to your promotion. |
| **Sales Managers:** | Review and either reject or approve submitted promotions. |
| **Finance Managers**: | Use real-time visibility to track trade promotion spending |
| A/R, A/P staff: | Close promotions to 'release' promotion liability. |

**Helpful hint:** If you don't see the iTPM workflow buttons you need to do your job, your NetSuite role may not have the required permissions. Contact your iTPM administrator.

## 1.2 iTPM supports the following types of trade promotion spending:

| Spending | Description of Trade Promotion Spending supported by iTPM |
|---|---|
| **Lump Sum** | This is a fixed amount that does not change, and is not dependent upon the quantity that is sold or purchased. Not all promotions have lump-sums.<br><br>Lump Sum is considered incurred on the first day of the promotion. If a lump sum claimed is greater than the original amount, the overpayment does not reduce promotional liability beyond the original estimated amount.<br><br>**Example Lump Sum: $2,500 Display Fee** |
| **% Discount** | A percent discount is a way of offering a discount that can be the same percentage across items or customers, but can represent a different rate per unit-of-measure (UOM). Examples of UOM = cases, pallets, eaches, gallons, etc.<br><br>Price *TIMES* (Percent Discount / 100) = Rate per UOM<br><br>It is important to confirm what price should be applied to the discount. iTPM gives the user the option to select the NetSuite price: customer price, base price or a price level.<br><br>**Example % Discount: 10% Discount off a case with a list price of $10.00. The discount is $1.00 per case.**<br><br>If the list price changes to $11.00 before the deal starts, the discount is defined as 10% of List, *NOT* $1.00 per case. Your expected liability is $1.10 per case. |
| **Rate per Unit** | An allowance can be offered as a specific rate per unit-of-measure (UOM). iTPM supports all UOMs that are in NetSuite for that specific item. i.e. Allowance per UOM of $2.50 per case. iTPM uses the item's price to also show your Allowance per UOM as a % discount:<br><br>( Rate per UOM / Price ) / 100 = Percent Discount<br><br>**Example Rate per Unit: $1.00 per case, which is a 10% discount on a $10.00 case.**<br><br>If the list price changes to $11.00 before the deal starts, the discount is defined as $1.00 per case, *NOT* 10%. Your expected liability is $1.00 per case. |

## 1.3 Bill-back, Off-invoice and Net-Bill

| Method of Payment | What is it? | When to use it? |
|---|---|---|
| **Bill-Back** (BB) | Bill-backs are allowances or fixed fees that are **paid after the transaction**. | Use this method-of-payment when you want to **hold-back payment of allowances** until the recipient qualifies for the discount. (Best Business practice) |
| **Off-Invoice** (OI) | OI allowances are **applied directly at the time of invoicing**. | Use this when you want the recipient to get the allowance **without any conditions, qualifications or restrictions.**<br><br>*i*TPM off-invoice allowances can be applied directly to the order when the order is created. For EDI orders, the *i*TPM subtab is used to confirm order accuracy. |
| **Net-Bill** (NB) | **Net-bills are like OI**, as they are applied directly at the time of invoicing.<br><br>However, unlike OI, net-bills adjust the price but hide the allowances to the customer. | When you want the retailer to get the **discount right on the invoice, but do not show the allowance.** Some retailers set everyday pricing based on the manufacturer's list price.<br><br>Net-bill can be used to get lower everyday retail prices without making customer-specific price changes, and still being able to track the cost of the price change to the trade budget.<br><br>*i*TPM net-bill allowances can be applied directly to the order when the order is created. For EDI orders, the *i*TPM subtab is used to confirm order accuracy. |
| **Header Discount** | Header discounts are applied directly at the time of invoicing. | This is similar to off-invoice. Off-invoice is applied to each line in the sales order, while header discounts are applied only once to the sales order subtotal. Header discounts are net of other discounts applied at the line level. |
| **Header Surcharge** | Surcharges are applied directly at the time of invoicing. | Surcharges increase the amount of the sales order. Header surcharges are applied only once to the sales order subtotal. |

***Before*** you create a new *i*TPM promotion, considering these questions for your new promotion:

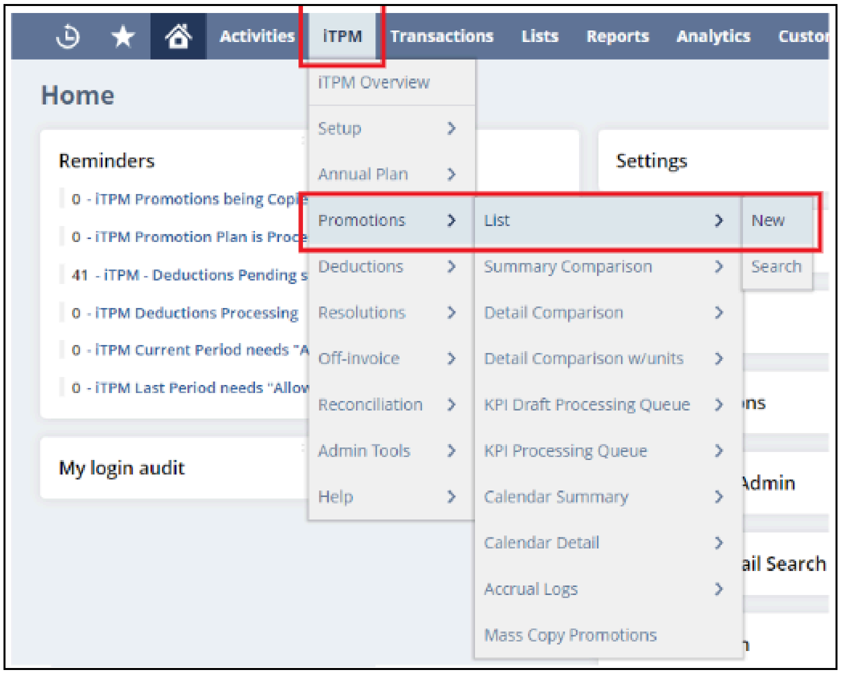
- ***Who*** will you offer this promotion? — What Customer? Example, Kroger<br>Corporate level, or for a KMA or DC?
- ***When*** will you offer this promotion? — What start and ending dates?
- ***What*** discounts? — What items? Item #1001, $5.00/case bill-back<br>Created for an item, or group of items?
- ***How much*** do you think you'll sell? — 250 cases of item #1001, 300 cases of #1002
- ***Why*** are you running this? What's at retail? — $1.99 Promoted price, merchandising= Display

# 2.0 Create a *New* Promotion

**Login to NetSuite.** When *i*TPM is installed, you will see the *i*TPM drop-down menu.

If you didn't create your promotions using your annual plan, here's how to create promotions:
(Learn how to create promotions from an annual plan: ***iTPM -> Help -> Annual Planning User Guides***)

The first step is to create a new promotion: ***iTPM -> Promotions -> List -> New***




**Helpful hint:** If you don't see the ***iTPM -> Promotions -> List -> New*** menu, or if you see it but get an error message trying to create a new promotion, your role does not have permission to create a new promotion. Contact your *i*TPM administrator.

**Helpful hint:** Have you used *i*TPM before? If not, you may just need a summary to get you started? You can use the One-Page Promotion Planning Quick Reference at the beginning of this User Guide. New to NetSuite? The NetSuite Basics User Guide at www.i-TPM.com/promotion-planning may be helpful.

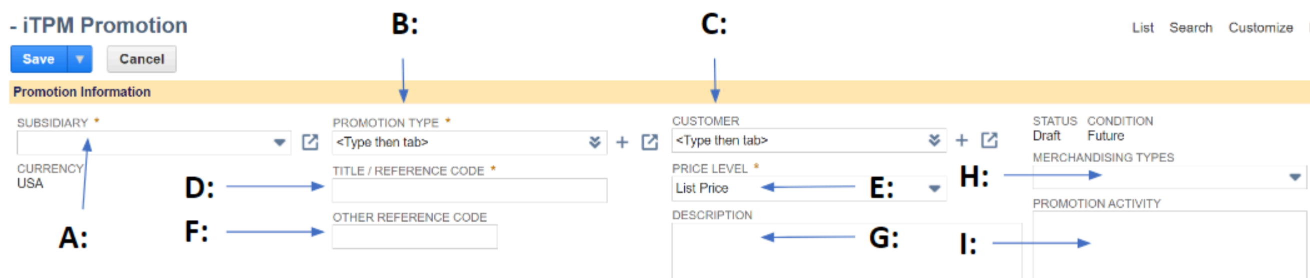
**Create two promotions with one item each, or one promotion with two items and allowances?** If both of your items and allowances are for the same customer with the same start and end dates, we recommend creating one promotion with two items.

**Helpful Hint:** You can copy-a-promotion from one customer to another to save time. See section 2.10 for more details, or you can Mass Copy promotions to next month, next quarter, and/or next year.

## 2.1 *Who?* Select Customer & More…

Enter general information that defines who will get this promotion:

| | |
|---|---|
| **A**: Change the default **Subsidiary** if necessary: | *Example, "Canada"* |
| **B**: Select what **type of promotion** you want to create: | *Example, "Hi / Low"* |
| **C**: **Select the customer** that will receive the discounts: | *Example, "Albertsons"* |
| **D**: Enter a **Title / Reference Code**: | *Example, "Summer Days Promotion"* |
| **E**: **Review the Price Level** used with these discounts: | *Example, "List Price"* |
| **F**: Optional: **Other Reference Code**: | *Example, "1234-ALB"* |
| **G**: Optional: **Enter a description**: | *Example, "Radio, Social Media overlay"* |
| **H:** Optional: Select the **merchandising type** | *Example: Ad* |
| **I:** Optional: Select all **promotional activities** that apply | *Example: Ad: Major, TPR* |




**Helpful Hint:** If your customer has a price level, *i*TPM will default the price level to the customer's price. This price level is used to calculate the estimated spend for your promotion KPIs.

***Do corporate level promotions apply to all the ship-tos?*** Yes, if the DCs or ship-tos were created in NetSuite under the corporate parent. Contact your *i*TPM administrator to confirm your configuration.

**What *Promotion Type* should I select?** Select a promotion type that best matches the promotion you want to offer. Click on in the promotion type data field to see a list of available promotions types.

**Why can't I find my *Customer* when creating a new promotion?** If your company has multiple subsidiaries, make sure you've selected the subsidiary that contains the customer you want.

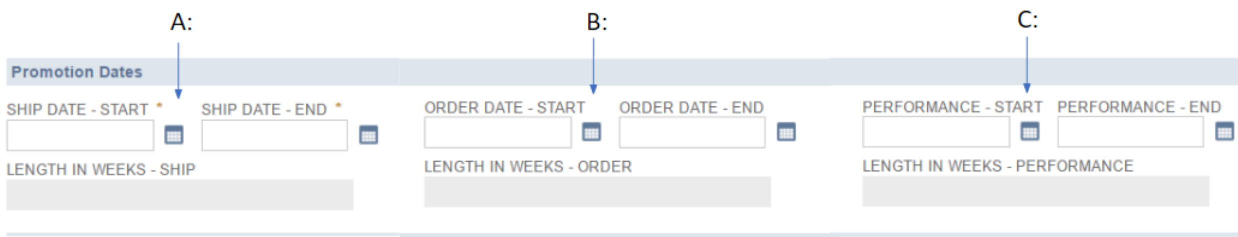
**What *Price Level* should I use for my allowances?** *i*TPM should default to the NetSuite Base Price or List price, or price level specific to your customer. *i*TPM uses these prices to estimate the rate per UOM for discounts entered as a percentage. If your customer doesn't use price levels and has their own prices in NetSuite, select the price level "Customer specific price" in the drop-down menu.

**Helpful Hint:** Once you click SAVE, you will **NOT** be allowed to change the subsidiary or promotion type, but you can change the customer. Copy the promotion if you need to change the subsidiary and/or promotion type. These fields are locked to prevent the creation of bad data. If you made a mistake, just *void* the promotion. You can delete VOIDED promotions.

## 2.2 *When?* Enter Dates

There are three dates:

**A**: Enter start and ending **ship dates**: *These are the official promotion dates.*
**B**: Enter start and ending **order dates**: *Order dates may be **optional** for your promotion.*
**C**: Enter start and ending **retail performance dates**: *Retail Performance dates may be **optional**.*




**If you see any of these three promotion dates on your promotion, you must enter dates.**

**Helpful Hint:** You can use *Length In Weeks* as a quick check to confirm your dates are correct. Length is calculated after you enter your lump sum and save your promotion.

**Sometimes I see one, two or three sets of dates. Why?** Your *i*TPM administrator has configured your promotion types to only prompt for the dates that your company needs. Start and end ship dates will always be visible. Order and performance dates are optional.

**How are dates used?** For bill-backs, *i*TPM uses your ship dates to calculate *expected liability*, which is an estimate of how much you will owe for the promotion.

For off-invoice, *i*TPM uses your ship dates to determine which orders qualify, and can apply your allowances directly to the order. *i*TPM also uses ship dates to show you promotions that are layered with this promotion. After you save this promotion you can go to the Overlapping Deals subtab to see what other promotions overlap this promotion.

**Helpful Hint: There are up to five approval levels available for approval roles:**

- Each approval level has a maximum estimated promotion spend that the role can approve. Example: Level 1 is up to $1,000, Level 2 is up to $5,000, etc.
- Future promotions can be configured to auto-approve if their estimated spending is at or below level one.
- Approver roles can be configured by level to approve back-dated promotions. (Select the list view of back-dated promotions at *iTPM -> Promotions -> List*
- Approver roles can also be configured by level so you can approve your own

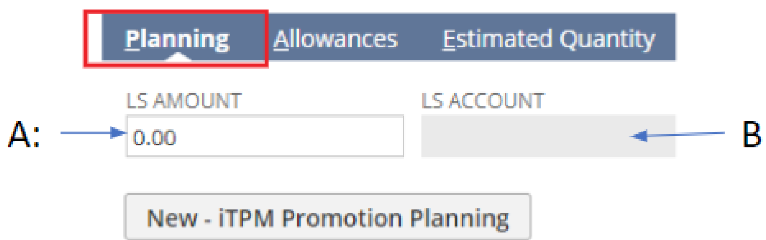
*i*TPM approval roles will be configured to meet the needs of your organization.

## 2.3 *Any Lump Sum or fixed amount?* (optional)

**Enter a lump sum** if you have a **fixed fee that doesn't vary based on what you sell**, OR if you have a scan-down event and just want to enter the estimated cost as a lump sum:

**Under the Planning subtab:**

**A**: Enter the **Lump Sum** amount: *Example, $10,000*
**B**: Review and select the NetSuite chart-of-**account**: *Example, 6011 Trade Promotion Fund*




**Why can't I enter the lump sum?** If you clicked *SAVE* before entering your lump sum, **click *EDIT***.

**What if there is no lump sum?** Lump sum is optional for *i*TPM promotions. Not all promotions have a fixed-fee, also called a Lump Sum. If your promotion doesn't have a lump sum, then just skip this section and leave it blank.

**What if I have more than one lump sum for my promotion?** You have two options.

- **You can add up the lump sums**, and enter just the total amount into your one promotion. When you pay a lump sum, you can pay it as two or more separate settlements or as one settlement. If you use this approach, make sure to add notes to both the promotion and the settlements to document the various lump sums that you added together to arrive at the total amount.
- Alternatively, **create overlapping promotions** so you can keep the lump-sums separate and unique. Adding notes and comments to the promotions helps document your promotion.

**Every promotion must have at least one item or item group associated with the lump-sum:** Every promotion must have at least one allowance row so the lump sum can be mapped to an item. **If you don't have any other allowances with your lump, create an allowance for one item with a 0% or $0 rate per unit.**

**Helpful Hint for Scan-down promotions:** Your *i*TPM administrator can create a promotion type which will NOT update liability based on shipments. If your promotion type updates liability using shipments, you can still 'force' *i*TPM to not update liability using shipments. Just enter the total expected promotion cost as a lump-sum. **Then do *ONE* of the following:**

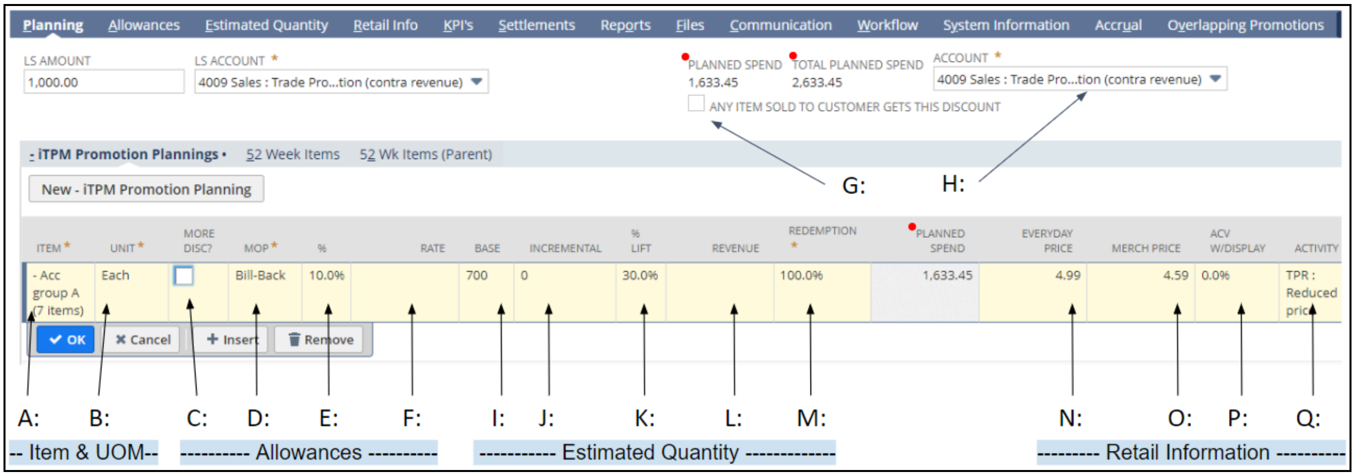
- **Enter a zero percent or rate per unit allowance** for at least one item, **...**
- **… OR enter the actual scan down rate** per unit as an allowance, **and enter 0% redemption** in the estimated quantity subtab.

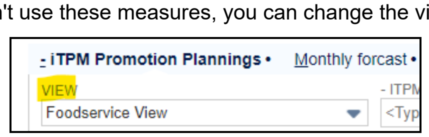
Details in the next section 2.4.

## 2.4 What discounts, how much will you sell, and what will happen at retail?

You've identified the customer and the promotion dates. Now enter the allowances & other information:

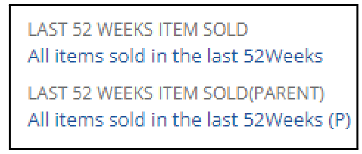
1. Enter the following information shown below **directly into the grid just as you do in Excel**.
2. Another item? Under Planning, click + Insert to add new items or item groups to your promotion.
3. **When done adding all of your items, item groups and allowances, click SAVE**
4. **After SAVE, you will see estimated trade spend.** (Red dots in the screenshot below)




| | | |
|---|---|---|
| **A** | **Select item or item group** | Click in the box, click on the down arrow, and LIST if you don't know the code or item name to enter. |
| B | **Unit-of-Measure** | Select the UOM appropriate to your rate-per-unit, and how you will estimate volume. |
| C | Additional discounts? | (Check if you will enter multiple allowances for the same item in this promotion.) |
| **D** | **Method of Payment** | Off-invoice, Bill-back, Net-bill, Fixed-price, Header Discount or Header Surcharge. |
| E | % discount*, --OR -- Allowance Rate per unit* | *Enter either a percent OR a rate per unit discount. Only one discount type per row. Stacking discounts for the same item in this promotion? Create two planning rows and check "*Additional Discounts?*" in each row. Consider creating two promotions instead. (recommended) |
| F | | |
| G | Do all items get this discount? | ** **Enter any two** of these numbers:<br>• **Base & % lift** --OR -- iTPM calculates incremental volume in your selected UOM.<br>• **Base & incremental units** --OR -- iTPM calculates base and incremental revenue.<br>• **Total Revenue & % lift** iTPM calculates base & incremental units in selected UOM. Note: Total Revenue includes incremental volume.<br><br>Note: When created from an Event plan, option for iTPM to calculate the base from the base forecast. iTPM will soon default base volume & revenue using your monthly annual plan volume. Just enter percent lift, then review the default base and revenue values. Adjust as needed.<br>If "*Any item sold to customer gets this discount*" is checked, then an allowance will be created in the promotion for any item that is sold to the customer during the promotion dates. This will be added to the promotion every night based on what was sold to the customer the previous day. |
| H | GL Account for allowance | |
| I | Base Quantity** | |
| J | Incremental Quantity** | |
| K | % Lift** | |
| L | Revenue** | |
| **M** | **% Redemption** | What % of your planned volume will get your discounts? This is typically 100%, and it defaults to 100%. |
| M | Everyday price | These measures are optional:<br>Enter expected execution to document what you expect at retail.<br>If you don't use these measures, you can change the view to hide them:<br> |
| O | Estimated. Merch price | |
| P | Est. % ACV w/ Display | |
| Q | Merchandising Activity | |

**Helpful Hint:** Your promotion is saved and you need to make changes:
Use Edit and click into any row and cell to change your allowances, estimated quantity and/or retail information. When done editing, click Save again.

**Helpful Hint:** Planned Spend is calculated in real-time when you save your promotion. If you have more than 25 planning rows in your promotion, Planned Spend under the Planning Subtab can't be calculated. You'll need to wait for *Process Plan* to finish to see the promotion KPIs.




Use "*52 Week Items*" to see what you sold to this customer.

What is "***Additional discounts?***" This checkbox is used to allow multiple discounts in the same promotion for the same item. Example, 5% OI plus 10% bill-back. If this is not checked, *i*TPM prevents you from inadvertently creating a duplicate allowance for the item in the same promotion.

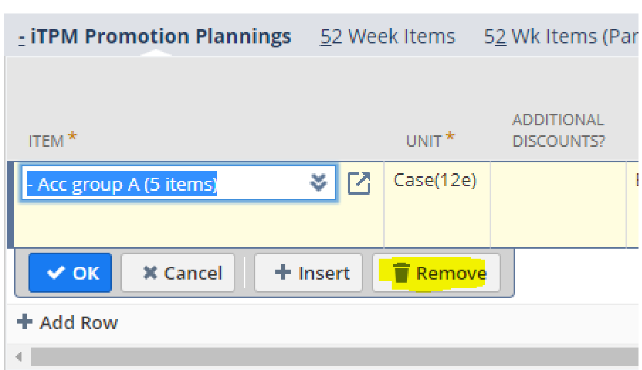
**Do I have to enter my allowance both as a percent and rate per unit?** No! Enter the allowance only how you will communicate the allowance to your customer. **Percent discount OR rate, NOT BOTH.**

**How does *i*TPM handle the estimated quantity for item groups?** *i*TPM spreads your estimated quantity across all the items in the group. For example, if you enter 500 estimated incremental cases for a group with 5 items, each item in that group will be allocated 100 cases.

**What is %ACV?** (optional) This is short for "all commodity volume'. This number is between 0% and 100%, and represents your **best guess** of the retail display execution. This is helpful for post-promotion analysis to help explain why some promotions do better than others.
**What are everyday price and merch price?** These are the prices a consumer will see in the store.

**After you *SAVE* your promotion,** want to make changes? Just EDIT your promotion and scroll down to the grid. You can click on the cell you want to edit and change the value.

**How do I delete or remove an item or item group from my promotion?**
1. Click on the ***PLANNING* subtab** to see a list of the items and item groups in your promotions.
2. Click on the *row you want to remove, and **click REMOVE.***
3. Click ***SAVE***.



**What happens if I enter base volume twice for the same item? (**Multiple allowances for the same item in the same promotion.) The last item processed will overwrite the estimated quantities and retail info.

**Why do I have to enter my estimated quantity as base and incremental?** Entering the incremental quantity you expect this promotion to generate is one way for you to communicate what this promotion will do for your company. Effective promotions generate incremental quantities. When the *i*TPM forecast module is available, you will just enter incremental quantity, if any and review the default base quantity.

**There are three ways we suggest estimating how much you will sell:**

- **Enter Base volume and % lift.** *i*TPM will calculate your incremental units.
- **Enter Revenue and % lift.** *i*TPM will calculate base and incremental units.
- **Enter your base and incremental units**. *i*TPM will calculate base and incremental revenue.

**What is Plan # next to the promotion #?** If your promotion was created from and Excel planner upload, your can see the Event Plan that created the promotion at *iTPM -> Annual Plans -> Event Plans*

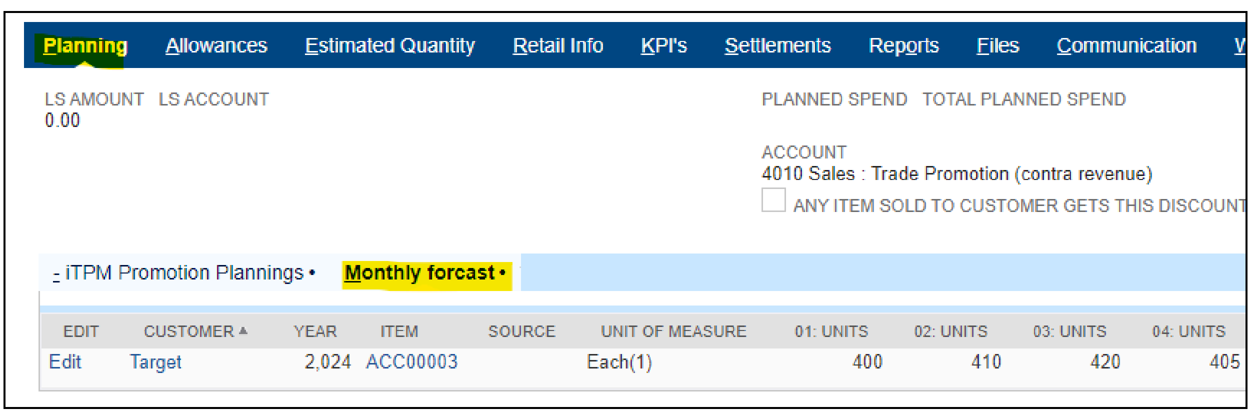
**How does *i*TPM use percent redemption?** *i*TPM multiplies your estimated quantity times your percent redemption to calculate estimated promoted quantity. This is how many units you think will qualify for your allowances. This defaults to 100%, which is the typical redemption % used for trade promotions.

**Why should I enter retail information?** It is important to document what you expect this deal to accomplish at retail:

- Communicate to the promotion approver what this promotion will do.
- Defend against post-audits claims using this information to document anticipated results at retail.
- Use this information for post-promotion analysis. What happened at retail can reveal why some promotions generate better results.

View your monthly base forecast while you plan your promotion.

Do you use the Annual Planner to estimate your monthly base volume?
If you do, monthly units are visible under the Planning subtab, Monthly Forecast sublist.

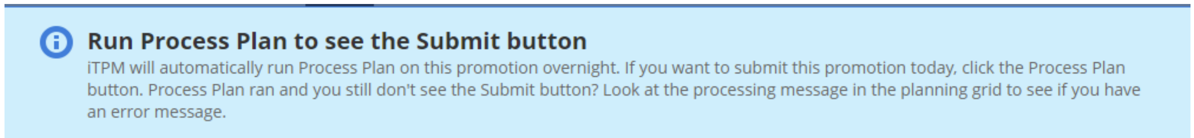



**Helpful Hint:** You have the option to plan monthly base volume by item or item group by NetSuite period in *i*TPM version 22.2.1. You have visibility of the monthly base in the promotion. When creating an Event Plan, you have the option to default your base volume using your monthly base forecast.

.

## 2.5 *Are you DONE PLANNING all your allowances?* Use Process Plan

Do you see the following banner at the top of your promotion?

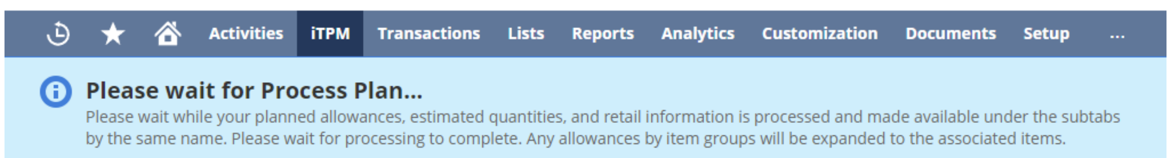



- **Overnight *i*TPM will automatically run Process Plan** on your promotion to validate your data and expand item groups into individual items.
- Do you need to submit your promotion ASAP? Then follow the following steps:

1. **Click on** Process Plan when you are done entering everything about your promotion under the *PLANNING* subtab.

> **Helpful Hint:** The ***PROCESS PLAN*** button expands your promotion allowances to every item in your item groups. When processing is done, you'll see the item level data under the allowances, estimated quantity and KPI subtabs.
> - If you don't run Process Plan, it will automatically run overnight.
> - Use the Dashboard reminder to see what promotions need Process Plan.

2. **Your promotion will be locked until processing is done,** and you will see a *Please Wait…* banner above the promotion. You can do something else in NetSuite and/or *i*TPM.




3. When **processing is done,** the promotion is unlocked and the *Please Wait banner* is gone**.**

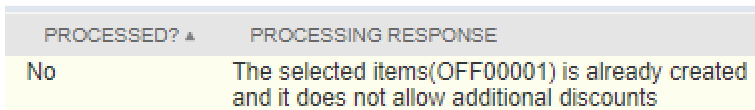
> **Note:** Could take up to 15 minutes for your allowances, etc. to be processed.

4. Review the Planning subtab to confirm your item and item group allowances were processed. If you see "*YES*" in the *PROCESSED*? column for EVERY item or item group in your promotion and no messages under *PROCESSING RESPONSE* column, skip ahead to 2.6 Review your promotion BEFORE submitting it for approval!

| PROCESSED? ▾ | PROCESSING RESPONSE |
|---|---|
| Yes | |

5. **If you will see "*NO*" in the *PROCESSED?* column** for ANY item or item group in your promotion, **or if you just see any message** then:
    a. Click ***EDIT*** at the top or bottom of the page
    b. **Click into the cell and fix** any allowance that has error (That row will have a message to help you identify the issue)
    c. Click ***SAVE*** at the top or bottom of the page
    d. Go back to #1, and click ***PROCESS PLANS***

    **e. Example:** Scroll to the right to see these two columns:

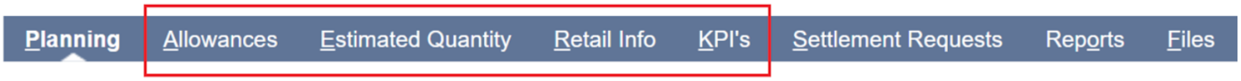


| PROCESSED? ▲ | PROCESSING RESPONSE |
|---|---|
| No | The selected items(OFF00001) is already created and it does not allow additional discounts |

| Example Message | What it Means | How to fix the issue |
|---|---|---|
| *The UOM you selected is not valid for the item ACC00002. UOM changed to the item's sales unit.* | NetSuite may have multiple units-of-measure with the same name, but different internal IDs. iTPM will replace the "case" you selected with the correct "case". For this record, iTPM could not find a match for this item. | Confirm the UOM is correct. If not, EDIT the promotion and change the UOM to match how you entered your discounts and estimated volume. |
| ** Base Price Of Item WIR00001 in the selected Item group is Zero.* | iTPM must use the item's base price to calculate estimated revenue, but it is zero for this item. Estimated revenue for this item will be zero. | Review this item's prices by price level in NetSuite. You may need to either change the price level in your promotion, or have the master data team populate the missing prices. |
| ** ACC00002 For this item EstQty Base and Incremental Qty properly not allocated.* | Your estimated volume in the planning record doesn't match the estimated volume under the Estimated Quantity subtab in the promotion. | Look for these issues:<br>• Duplicate items (i.e. two item groups in promotion have the same item)<br>• Item with zero price<br>• Inactive items |
| ** ACC00001 Estimated Qty allocation issue. Duplicate item?* | Your estimated volume in the planning record doesn't match the estimated volume under the Estimated Quantity subtab in the promotion. | If having two allowances for the same item in the same promotion is correct, then check "More discounts?" in the row.<br>If each item in the promotion has only one discount, then remove the duplicate item from the promotion. |
| *The selected item is inactive ACC00005* | This item was active when it was added to your promotion or NetSuite item group. It has since been changed to inactive. | Your master data team should remove the inactive item from your item group. If this item was previously selected, remove this item from the promotion if the promotion is draft status. |
| *Rate ignored, only % discount used* | You entered both a rate and a percent discount. iTPM will only use the % discount and calculate the rate. | No action needed if you entered your discount as a % and Processing Status = YES. If you entered it as a rate, enter blank into the % discount. |
| *From plan 722* | If you used an Excel planner to create your promotions, this tells you the Event Plan that created your promotion. | No action needed. You will not see this message after *Process Plan* runs. |
| *Please enter Revenue OR Base and Incremental, not both.* | You entered too much information and iTPM doesn't know what to calculate. | Either set estimated base and incremental units to blank, or set revenue to blank. |

## 2.6 Review your promotion BEFORE submitting it for approval!

When *i*TPM is done expanding your promotion to item detail, your promotion is 'unlocked' and you can review your promotion before submitting it.




**Note:** *i*TPM only uses Lump Sum from the planning subtab. *i*TPM does NOT use allowance information under the PLANNING subtab for KPI calculations.

*i*TPM uses the item level data under the ALLOWANCES and ESTIMATED QUANTITY subtabs for KPIs. Make sure the Unit-of-Measure matches how you are planning your promotion.

**Suggestions to catch errors before you submit your promotion for approval:**

- Under the ***PLANNING*** subtab, see if there were any error messages encountered when *i*TPM expanded your item groups to item.
- Under the ***ALLOWANCES*** subtab, make sure all the items, unit-of-measures, and discounts look correct.
- Under the ***ESTIMATED QUANTITY*** subtab, confirm your volume that was entered at a NetSuite item group level has been allocated across all the items in the group.
- Under the ***KPI*** subtab, review your estimated spending for the promotion.
- Estimated Spend under the KPI subtab should be the same or close to Planned Spend under the Planning subtab.
- Use the ***OVERLAPPING PROMOTIONS*** subtab and the calendar view to look for overlap errors.

If you need to make changes, **EDIT** the promotion, **SAVE**, and run **PROCESS PLAN** again as needed.

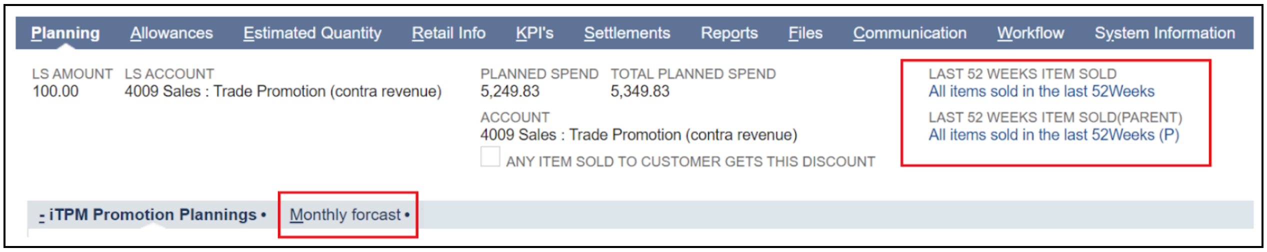
**Helpful Hint:** If your promotion is FUTURE condition, your organization may allow it to auto-approve if the estimated spending is within the auto-approve threshold.
If you need to make changes, you can use the VOID OR CHANGE button, then Back-to-Draft. Once in DRAFT status, you can edit your promotion and re-submit it.

**Helpful Hint:** The ***PROCESS PLAN*** button expands your promotion allowances to items in your item groups. When processing is done, you'll see the item level data under the allowances, estimated quantity and retail information subtabs for every item in each of your NetSuite item groups.

## 2.7 Is my estimated quantity reasonable?

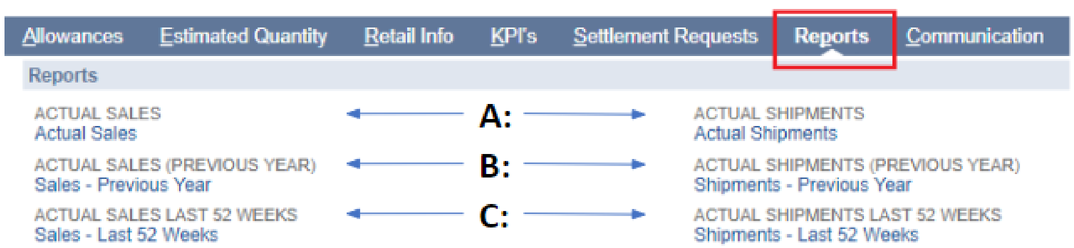
**How do I know how much I will sell?** From your promotion you have access to historical sales for direct customers, and for all customers you have the option to view your monthly base forecast, SPINs and other data to help estimate volume.

**Go to the *PLANNING* subtab for the 'Last *52 Week Items'*** report links, and to see the sublist to view your ***Monthly Base Forecast***. These are available before and after you use th *Process Plan* button.




Click on the ***Reports* subtab** to see report links that show ONLY the items that are in the promotion,

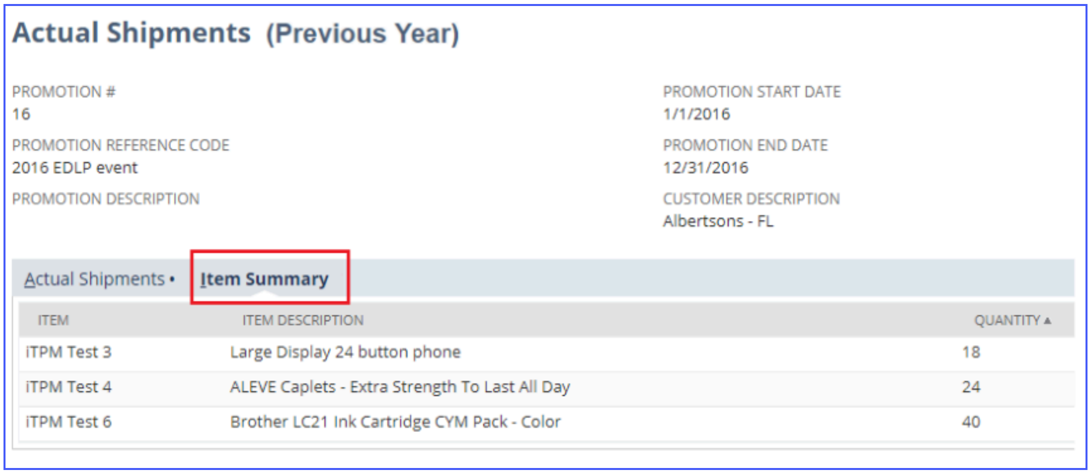
**A**: **Actual** sales and shipments **for your promotion.** (KPIs use SHIPMENTS to calculate liability.)
(For future planning, this is only helpful if you are looking at a similar promotion that's completed.)
**B**: **What happened last year?** Actual sales and shipments for the same promotion dates last year.
**C**: **What do I typically sell?** What you actually sold over the **last 52 Weeks from today.**
**Note:** Report links under the reports subtab only work only after Process Plan.




The ***Actual Sales sublist*** shows you **every transaction** from last year.
The ***Item Summary sublist*** gives you a **total by item** of what you sold.


**Helpful Hint:** Report links under the *REPORTS* subtab are only available after *PROCESS PLAN* has completed. These reports use items under the allowances subtab.

**Helpful Hint:** If your promotion is at a corporate parent level, these reports will show sales and shipments for all of the ship-tos or bill-tos that are under the corporate parent in NetSuite.



## Actual Shipments (Previous Year)

PROMOTION #
16

PROMOTION REFERENCE CODE
2016 EDLP event

PROMOTION DESCRIPTION

PROMOTION START DATE
1/1/2016

PROMOTION END DATE
12/31/2016

CUSTOMER DESCRIPTION
Albertsons - FL

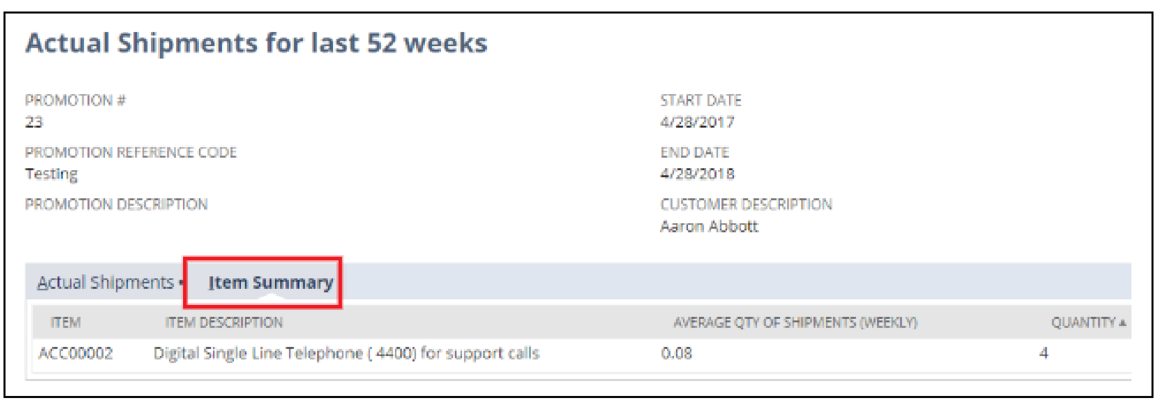
Actual Shipments • **Item Summary**

| ITEM | ITEM DESCRIPTION | QUANTITY ▲ |
|---|---|---|
| iTPM Test 3 | Large Display 24 button phone | 18 |
| iTPM Test 4 | ALEVE Caplets - Extra Strength To Last All Day | 24 |
| iTPM Test 6 | Brother LC21 Ink Cartridge CYM Pack - Color | 40 |

**Helpful Hint:** *Actual Sales* shows what was ordered. *Actual Shipments* show what went out the door. If you short-ship, *Actual Shipments* can be less than the NetSuite *Actual Sales*. For KPI calculations, *i*TPM uses actual shipments.

**Helpful Hint:** Click on the hyperlink to view a specific item fulfillment shipment.

When you sell or ship products infrequently, use average sales over the last 52 weeks for a perspective on what you might sell:



## Actual Shipments for last 52 weeks

PROMOTION #
23

PROMOTION REFERENCE CODE
Testing

PROMOTION DESCRIPTION

START DATE
4/28/2017

END DATE
4/28/2018

CUSTOMER DESCRIPTION
Aaron Abbott

Actual Shipments • **Item Summary**

| ITEM | ITEM DESCRIPTION | AVERAGE QTY OF SHIPMENTS (WEEKLY) | QUANTITY ▲ |
|---|---|---|---|
| ACC00002 | Digital Single Line Telephone ( 4400) for support calls | 0.08 | 4 |

**Helpful Hint:** Want to analyze the report data in EXCEL?

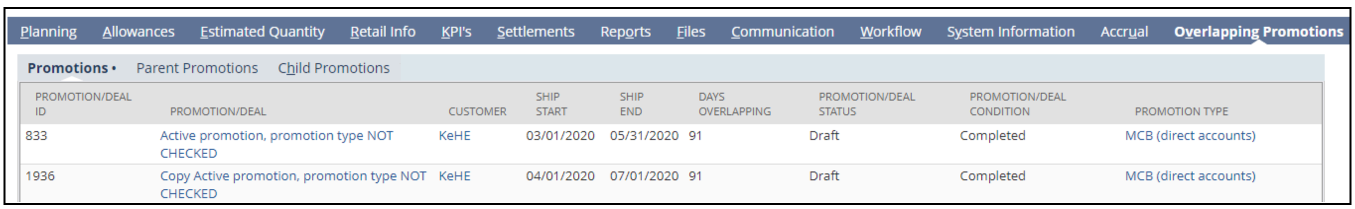
1. Highlight all the rows you need to analyze.
2. Right click and *COPY* (or control C) to copy the text
3. Choose a cell in EXCEL or Google Sheets
4. Right click and *PASTE*, using destination formatting.

## 2.8 Review Overlapping Promotions & Calendar View.

### Overlapping Deals subtab in the promotion


Click on this subtab to see what other iTPM promotions overlap this promotion. iTPM will look for overlaps for every item and every allowance within the shipment start and end dates of your promotion. This sub-tab shows you all of the important information on the overlapping allowance.

- **Promotions** sublist will show any promotions for the customer with overlapping start and ending ship dates.
- **Parent Promotions** sublist shows overlapping promotions for the parent of this customer. This will only be populated if you are viewing a promotion for a child or "DC", and there are overlapping promotions 'above' in the customer hierarchy.
- **Child Promotions** sublist shows any overlapping promotions that are 'below' your customer in the customer hierarchy.




| PROMOTION/DEAL ID | PROMOTION/DEAL | CUSTOMER | SHIP START | SHIP END | DAYS OVERLAPPING | PROMOTION/DEAL STATUS | PROMOTION/DEAL CONDITION | PROMOTION TYPE |
|---|---|---|---|---|---|---|---|---|
| 833 | Active promotion, promotion type NOT CHECKED | KeHE | 03/01/2020 | 05/31/2020 | 91 | Draft | Completed | MCB (direct accounts) |
| 1936 | Copy Active promotion, promotion type NOT CHECKED | KeHE | 04/01/2020 | 07/01/2020 | 91 | Draft | Completed | MCB (direct accounts) |

**Helpful Hint:** A calendar view will show you promotions by customer and by week.

***iTPM-> Promotions -> Calendar Summary***

**What is an Overlapping Deal?** An overlap is defined as an allowance for this promotion's customer, for an item on this promotion that overlaps the start and ending ship dates of this event. An allowance will be shown on this subtab event if the overlap is only one day. Use the *Days Overlapping* column to see how many days each allowance overlaps your promotion.

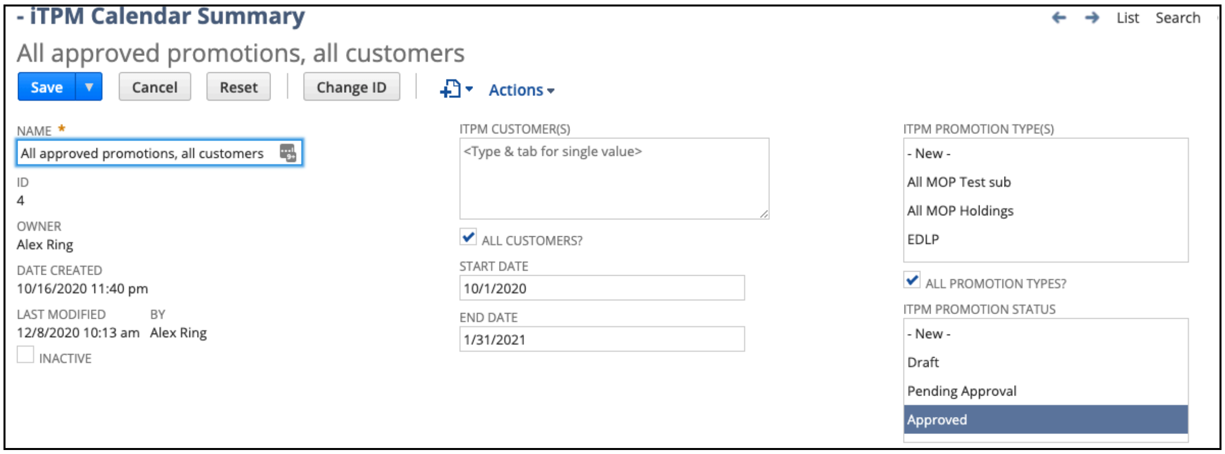
**Why is it important to look for duplicates?** If your company offers frequent deals and has many items to sell, it is easy to forget about a promotion among hundreds of allowances. A quick review of overlaps can prevent an accidental duplicate or unintended overlap.

**Calendar Summary Report:** Another way to visually review overlapping promotions is to use the Calendar Summary report, described on the next page.

## Calendar Summary View of Trade Promotions

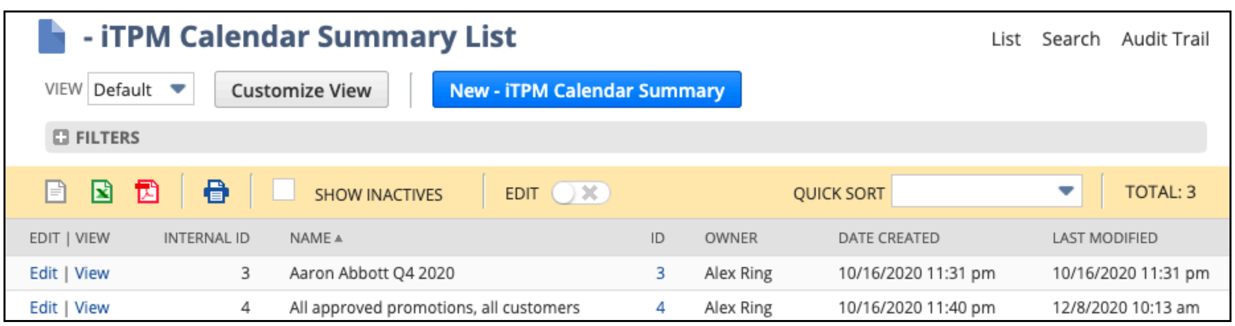
1. Go to ***iTPM -> Promotions -> Calendar Summary***
2. If you previously created your view, skip to step 7
3. To create a new calendar view, click 

4. Enter a NAME for your new calendar report, select customer(s),, dates, promotion types and statuses.
5. Click **SAVE**




**To view a calendar you previously created,**

6. Click VIEW on the row of the calendar you want
7. Click 


**Helpful Hint:** *i*TPM will not show partial months on the calendar. Enter any date within a month and *i*TPM will show the entire month of the start and ending dates. You can select up to 53 weeks for your calendar view.

**Helpful Hint:** Your calendar report will be best when viewed in Chrome. Other browsers have not been tested and may have formatting differences.

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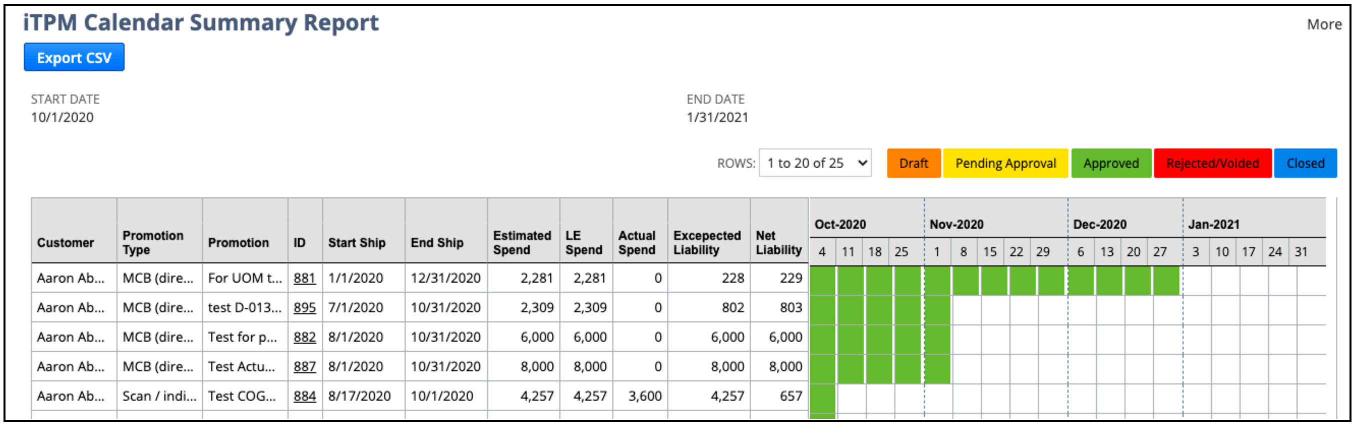
**Helpful Hint:** If your calendar view has an alignment issue,

- Change the browser zoom to 100% in the browser settings
- If not resolved, in Windows change the system display setting, "*Change the size of text*" to 100%.



iTPM Calendar Summary Report

More

Export CSV

START DATE 10/1/2020

END DATE 1/31/2021

ROWS: 1 to 20 of 25

Draft | Pending Approval | Approved | Rejected/Voided | Closed

| Customer | Promotion Type | Promotion | ID | Start Ship | End Ship | Estimated Spend | LE Spend | Actual Spend | Excepected Liability | Net Liability |
|---|---|---|---|---|---|---|---|---|---|---|
| Aaron Ab... | MCB (dire... | For UOM t... | 881 | 1/1/2020 | 12/31/2020 | 2,281 | 2,281 | 0 | 228 | 229 |
| Aaron Ab... | MCB (dire... | test D-013... | 895 | 7/1/2020 | 10/31/2020 | 2,309 | 2,309 | 0 | 802 | 803 |
| Aaron Ab... | MCB (dire... | Test for p... | 882 | 8/1/2020 | 10/31/2020 | 6,000 | 6,000 | 0 | 6,000 | 6,000 |
| Aaron Ab... | MCB (dire... | Test Actu... | 887 | 8/1/2020 | 10/31/2020 | 8,000 | 8,000 | 0 | 8,000 | 8,000 |
| Aaron Ab... | Scan / indi... | Test COG... | 884 | 8/17/2020 | 10/1/2020 | 4,257 | 4,257 | 3,600 | 4,257 | 657 |



Select the rows you want to view: ROWS: 1 to 30 of 175

Click on the promotion **ID** to open and view the promotion.

To scroll the calendar grid, click once on the grid and use your left and right arrow keys.

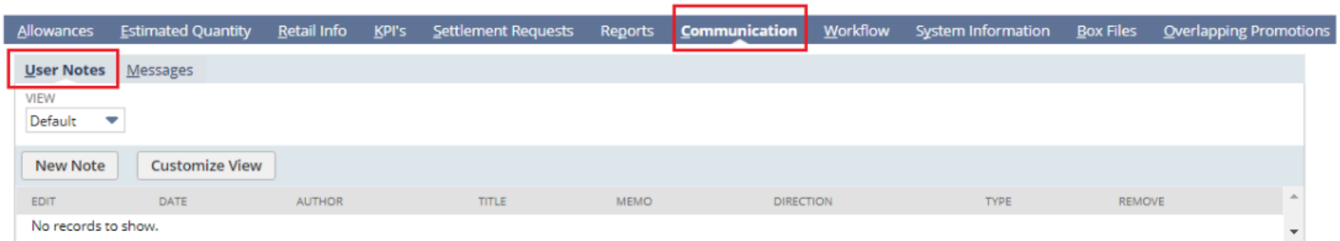
**Helpful Hint:** Want to analyze the report data in EXCEL?

Click Export CSV export the calendar data to Excel.

If you don't see this button, ask your administrator to give your role the NetSuite permission to export.

**Helpful Hint:** Need to see a calendar with detail by item and allowances? Run the Calendar Detail Report, ***iTPM -> Promotions - Calendar Detail***.

## 2.9 *Anything Else?* Add Notes, Attachments & More




Use standard NetSuite functionality to **add notes and attach electronic documents** to your promotion.

**Add notes to keep all promotion stakeholders informed on critical promotions:**

- **Submitting** a promotion for approval:
  - Additional information on **promotion negotiations**, and why you need to run this deal
  - **Communication** and feedback from the retail buyer
  - **Competitive information** if you are requesting *meet-competition* discounting
- **Approving** a promotion:
  - Feedback from the approver on why a promotion is rejected
  - Suggestions for next year if this deal will be copied and repeated
  - Note: Your promotion may be auto-approved after you submit it. If you made a mistake, you use the ***VOID or CHANGE*** button, then ***BACK-TO-DRAFT*** to make changes.
- **Tracking** a promotion:
  - Updated information on a promotion from the retailer and/or broker
  - Anything that might help the settlement team confirm compliance when processing the settlement for this promotion.

**Attach these documents to your promotion to help defend against post audits:**

- Customer's completed promotional form(s)
- Signed promotional contract
- Retailer's email commitment
- Retailer's standard price list for merchandising vehicles
- Broker's or field sales picture confirmation of retail execution, or URL link to that information
- Anything that might be helpful if the customer disputes what you owe for this promotion.
  - Retailer's stated prices for merchandising vehicles
  - Before / after planograms for new distribution allowances

**Note:** While you can attach summary PDFs of movement and other POS data, this is not the recommended way to get value from your third-party data. The future *i*TPM Analysis module will provide functionality to use AC Nielsen, IRI, POS, SPINS, warehouse withdrawal and other data for post-promotion analysis. The Analysis module is on the *i*TPM product roadmap.

**Note:** If you are not able to add notes, attach files, and/or assign tasks to a promotion, ask your NetSuite administrator for appropriate permissions to these standard NetSuite features.

## 2.10 *SUBMIT* for Approval

**Note**: Review your ALLOWANCES and KPI subtabs BEFORE you SUBMIT your promotion!

The PLANNING subtab is NOT your official promotion. The Process Plan button creates your **official promotion data that is under the *Allowances and Estimated Quantity* subtabs**.

Validate your promotion by reviewing your data, especially the allowances and KPI subtabs.

Your promotion is in ***DRAFT*** status until you submit it for approval. When your promotion is complete, click on Submit to have a supervisor review and approve the promotion.

**Helpful Hint:** If your promotion start date is in the future, promotions may be configured to auto-approve if the estimated spend is equal or less than the threshold amount set by your organization. Back-dated promotions will need to be approved.

**Helpful Hint:** Your promotion will be in "***PENDING APPROVAL***" status until your supervisor approves your promotion. If your promotion qualifies for auto-approval, your promotion will automatically change to *Approved* status!

**Helpful Hint:** The ***SUBMIT*** button will ONLY be visible when you ***VIEW*** a promotion, and not visible when you are editing the promotion. To save mouse clicks, use the ***VIEW*** link in the promotion list when selecting promotions from a list.

**Helpful Hint:** Made a mistake? Just click on ***VOID or CHANGE***. When your promotion is voided, click on the ***BACK-TO-DRAFT***. Once your promotion is in DRAFT status, you'll be able to edit and change your promotion as needed.

If you can't submit your promotion, you may get a message for one of the following:

- Promotion dates: Order dates must be equal or before the corresponding ship dates.
- Items: You have to have at least one item in your promotion under the *Allowances* subtab. If you have item rows under the planning subtab, click the PROCESS PLAN to populate the allowances.
- Estimated quantity: If volume is required, NO item can have zero estimated quantity.

**Note**: Don't forget to ***Submit*** your promotion!

Promotions in ***DRAFT*** and ***PENDING APPROVAL*** status are **NOT available for settlements**. Promotions in these statuses are **NOT** official promotions until they are approved. Your *draft* promotions can't be approved until you submit them.

If your Estimated Quantity is zero for any item on your promotion, and your company requires Estimated Quantity for this type of promotion, your promotion can't move to the *PENDING APPROVAL* status.

**Why don't I see a *SUBMIT* button on a promotion?** Two common reasons:

1. You only see the SUBMIT button when you VIEW, **not when you are editing the promotion.**
2. Only the person creating the promotion, and your *i*TPM administrator and other roles with appropriate permissions will be allowed to submit promotions created by other people.

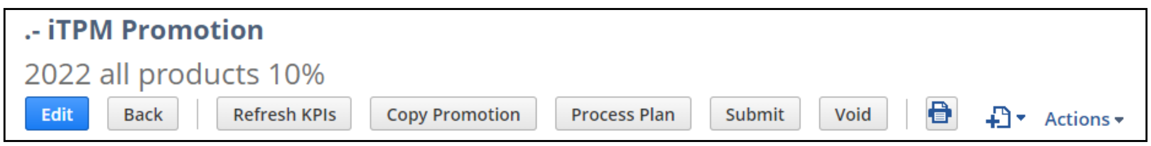
## 2.11 How to *COPY* a Promotion

There are three ways to save data entry time and copy promotions:

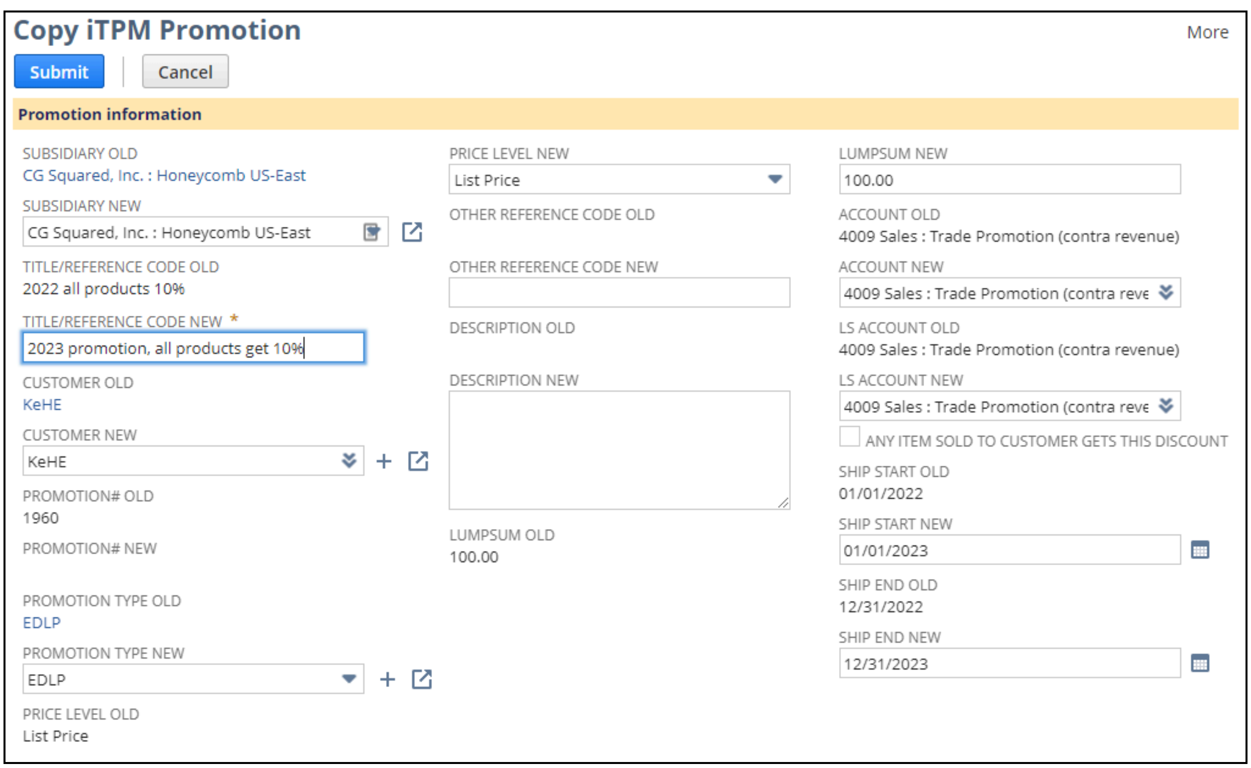
- Use the ***COPY PROMOTION*** button on the promotion
  - This copy is in real-time.
  - You only need to enter the values that change (like dates, promotion description, etc.)
- Use ***Actions -> Make Copy*** to copy the promotion you are viewing. For example….
  - Copy a successful promotion from last year to next year, or copy a promotion from one customer to another.
  - Copy the promotion you just created to run the same deal multiple times.
- Use **Mass Copy** to copy many promotions at once to next month, quarter or year.
  - Use this when you have many promotions to copy.
  - This allows you to copy up to 150 promotions at a time
  - You'll have to wait for all the promotions to be copied

Use the COPY PROMOTION button when you view the promotion.

1. **Click the COPY PROMOTION button**. It is visible on all promotions.

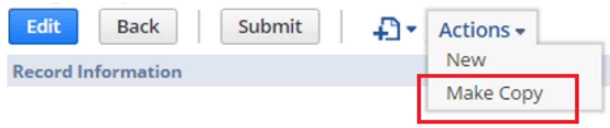



2. **Enter the values for your new promotion and click *SUBMIT***.



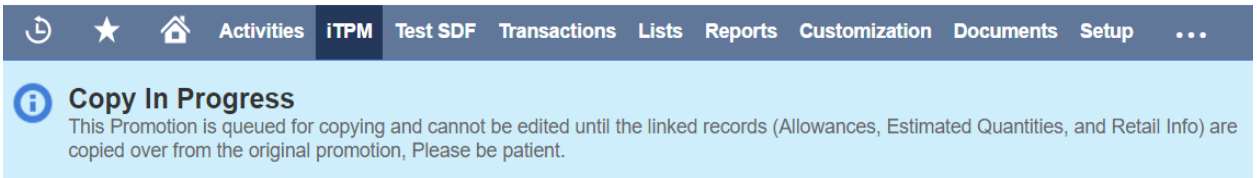
Copy a promotion using the ***Actions -> Copy*** when you view the promotion.

1. Find the promotion you want to copy, click on ***Actions***, and ***Make Copy***.

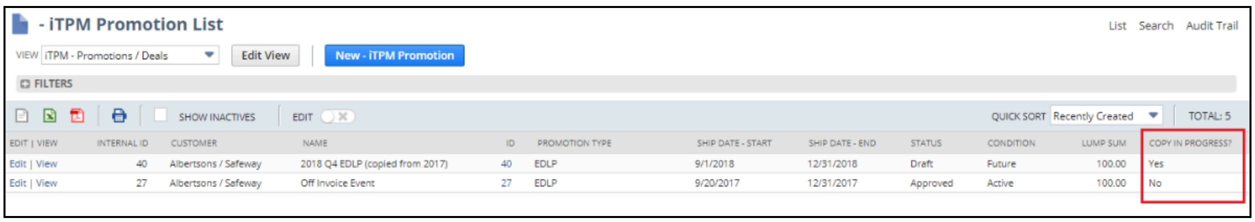



2. **Enter your new promotion description and change the dates**. You have the option to change the customer. Don't enter any data under the planning subtab. *i*TPM will copy that data for you.

**Is my promotion copy completed?** View the promotion, and view the banner at the top. If the promotion is fully copied, there is no banner. If the copy is still in progress, you'll see the message below:




**See the copy status on your promotion list:** (Also available in your NetSuite reminders)



- iTPM Promotion List

| EDIT \| VIEW | INTERNAL ID | CUSTOMER | NAME | ID | PROMOTION TYPE | SHIP DATE - START | SHIP DATE - END | STATUS | CONDITION | LUMP SUM | COPY IN PROGRESS? |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Edit \| View | 40 | Albertsons / Safeway | 2018 Q4 EDLP (copied from 2017) | 40 | EDLP | 9/1/2018 | 12/31/2018 | Draft | Future | 100.00 | Yes |
| Edit \| View | 27 | Albertsons / Safeway | Off Invoice Event | 27 | EDLP | 9/20/2017 | 12/31/2017 | Approved | Active | 100.00 | No |

**Helpful Hint:** If you want to use the copy feature to run a promotion multiple times this year or next, don't wait for your promotion to finish copying.

Use the  to go back to your **original promotion** and copy it multiple times.

You will not be able to copy your copied promotion while you see the, "*COPY IN PROGRESS*". Go back to the original promotion and to make another copy.

**Note: You will NOT be able to change the PROMOTION TYPE in the browser after you create a promotion** When creating a new promotion, make sure the promotion type is correct BEFORE you click SAVE. If you need a different promotion type, copy a different promotion and change the customer or create a new one.
If you used the Annual Planner to create your promotion, you have the option to change the promotion. See the Annual Planning User Guide for more details.

You can change and edit most of the information that's copied. The following table shows what IS and IS NOT copied into your new promotion:

| What is **copied** | What is ***NOT*** **copied** |
|---|---|
| **Overall promotion information:**<br>• Customer (change the customer if copying to another customer)<br>• Promotion type<br>• Pricing type<br>• Subsidiary and currency<br>• Dates (change the dates if making a copy to run this again in the future)<br>• Allowances, estimated quantity, KPIs<br>**Lump Sum** & related fields | **Promotion Title / Reference Code**<br>**Other Reference Code**<br>**Notes and electronic attachments** are NOT copied to the new promotion.<br>Promotion **Status**: New promotions always start as DRAFT.<br>Promotion **Condition**: The new promotion condition is based on the new promotion dates. |

**Helpful Hint! Be careful if you copy a promotion from one customer to another!** There are several reasons to be very careful if you copy a promotion from one customer to another.

Copying deals from one customer to another may not save you time!

- Review and revise estimated quantities for this customer!
- Lump sums are often not the same.
- Different items may be in distribution, so the promotion may include items that are not relevant, or exclude items that should be on the promotion.
- You may choose to use a different pricing type for your customer.
- Off-invoice promotions to direct customers are not valid for indirect customers.

**Helpful Hint! Take extra time to review copied promotions.**

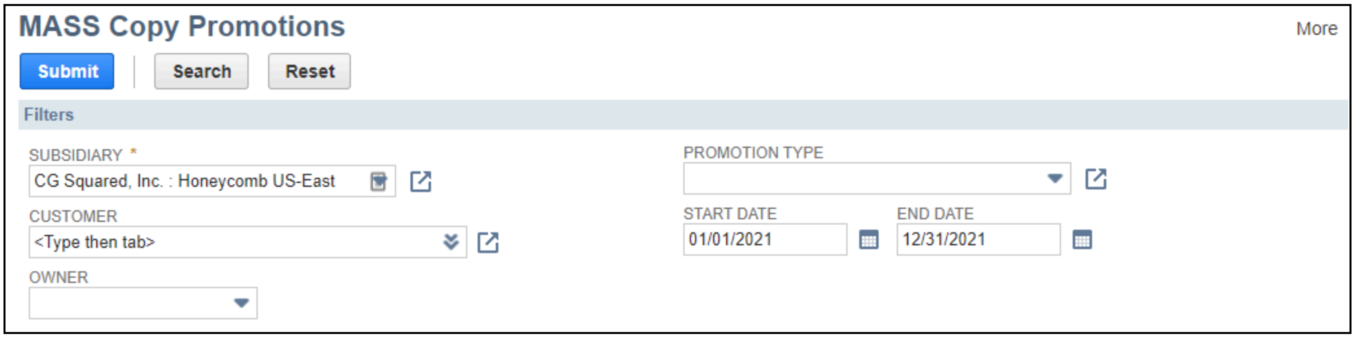
- It is easy and fast to copy promotions. Use some of the time you saved to review the promotion and confirm the promotion is accurate:
- Make sure the items are relevant. Especially make sure that new items added by new distribution allowances are in your promotion. While it is a best-business practice to remove discontinued items, keeping them in your promotion doesn't negatively affect your Estimated Spend, as-long-as you update your estimated quantity to zero or just one case!

**Note:** You will not be able to copy any promotion where your *i*TPM administrator has discontinued the promotion type making it unavailable for future promotions. Create a new promotion using ***iTPM -> Promotions -> New***.

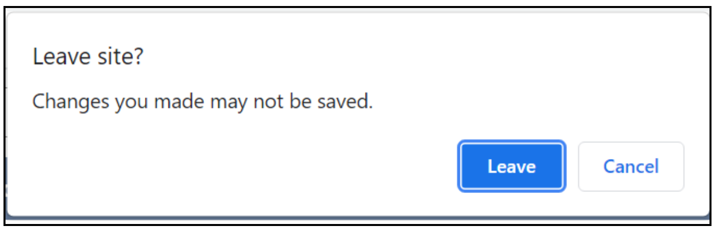
## 2.12 Mass *COPY* Promotions to next month, quarter or year

There is an easy way to copy up to 150 promotions forward to next month, quarter or year.

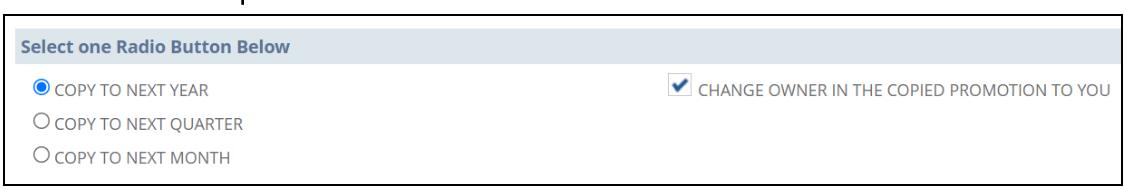
1. Go to ***iTPM -> Promotions -> Mass Copy Promotions***
2. **Set the filter** at the top of the form:



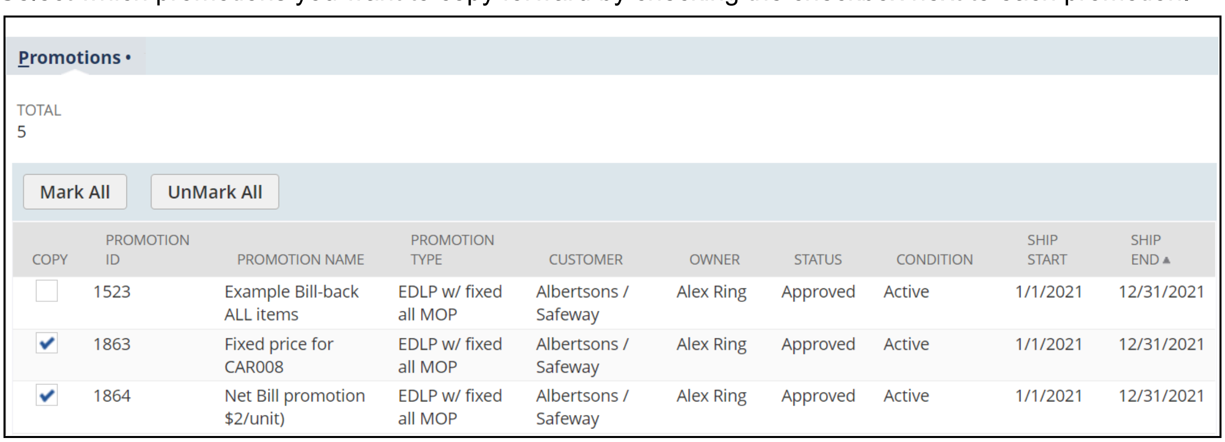

2. Click ***SEARCH, then "Leave"*** to see promotions that match your filter.




3. Select how you want to copy forward your promotions
Decide if you want to be the owner of the newly copied promotions, or if you want to also copy forward the promotion owner to the new promotions.




4. Select which promotions you want to copy forward by checking the checkbox next to each promotion.



Promotions •

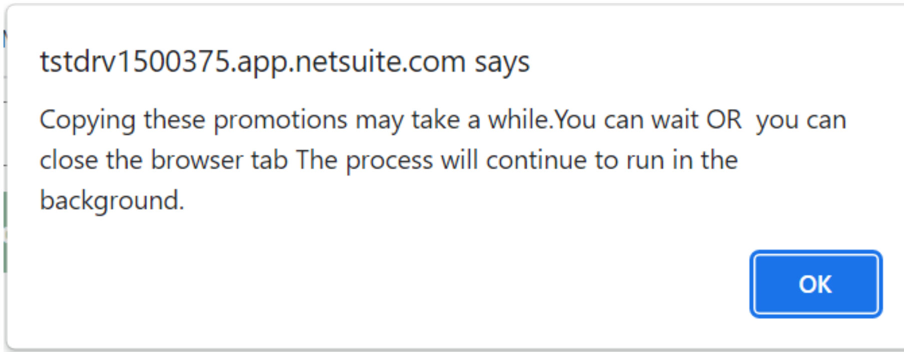
TOTAL
5

Mark All | UnMark All

| COPY | PROMOTION ID | PROMOTION NAME | PROMOTION TYPE | CUSTOMER | OWNER | STATUS | CONDITION | SHIP START | SHIP END ▲ |
|---|---|---|---|---|---|---|---|---|---|
| ☐ | 1523 | Example Bill-back ALL items | EDLP w/ fixed all MOP | Albertsons / Safeway | Alex Ring | Approved | Active | 1/1/2021 | 12/31/2021 |
| ☑ | 1863 | Fixed price for CAR008 | EDLP w/ fixed all MOP | Albertsons / Safeway | Alex Ring | Approved | Active | 1/1/2021 | 12/31/2021 |
| ☑ | 1864 | Net Bill promotion $2/unit) | EDLP w/ fixed all MOP | Albertsons / Safeway | Alex Ring | Approved | Active | 1/1/2021 | 12/31/2021 |

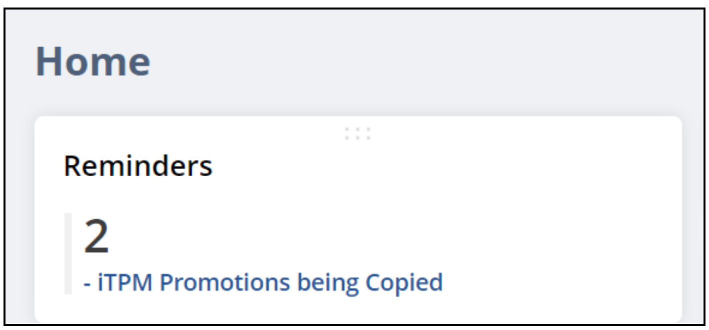
5. Click ***SUBMIT*** to copy forward your selected promotions.

6. CLick ***OK*** to the pop-up message box.  You can do other tasks while your promotions are copied.

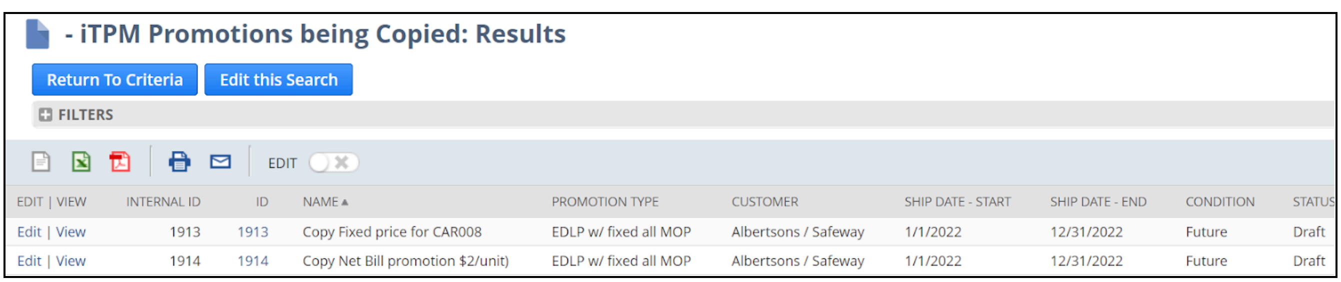



Your promotions go into a queue to be copied.  The script that copies promotions runs every 15 minutes.

You can check the status of your promotions using the reminder "- *iTPM Promotions being Copied*"




Click on the link to see promotions in the process of being copied.


- iTPM Promotions being Copied: Results

Return To Criteria | Edit this Search

FILTERS

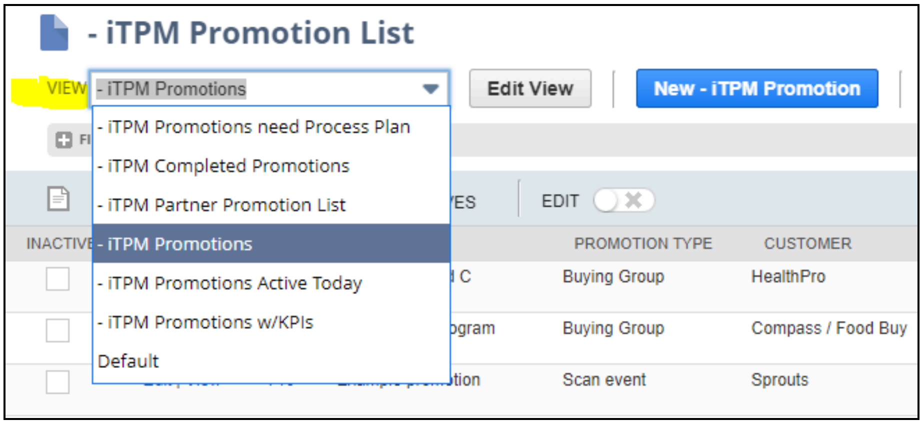
EDIT

| EDIT \| VIEW | INTERNAL ID | ID | NAME ▲ | PROMOTION TYPE | CUSTOMER | SHIP DATE - START | SHIP DATE - END | CONDITION | STATUS |
|---|---|---|---|---|---|---|---|---|---|
| Edit \| View | 1913 | 1913 | Copy Fixed price for CAR008 | EDLP w/ fixed all MOP | Albertsons / Safeway | 1/1/2022 | 12/31/2022 | Future | Draft |
| Edit \| View | 1914 | 1914 | Copy Net Bill promotion $2/unit) | EDLP w/ fixed all MOP | Albertsons / Safeway | 1/1/2022 | 12/31/2022 | Future | Draft |

## 2.13 How to Find Promotions in a List

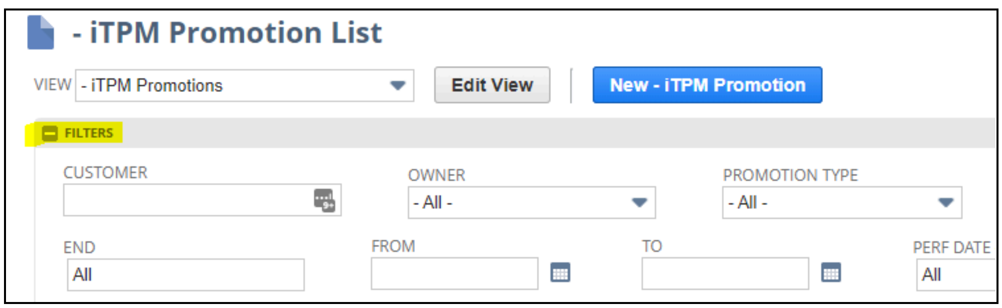
Here is one way to view all your promotions in a list:

1. Go to ***iTPM-> List -> Promotions***
2. **Click into VIEW and select "- *iTPM promotions*"**

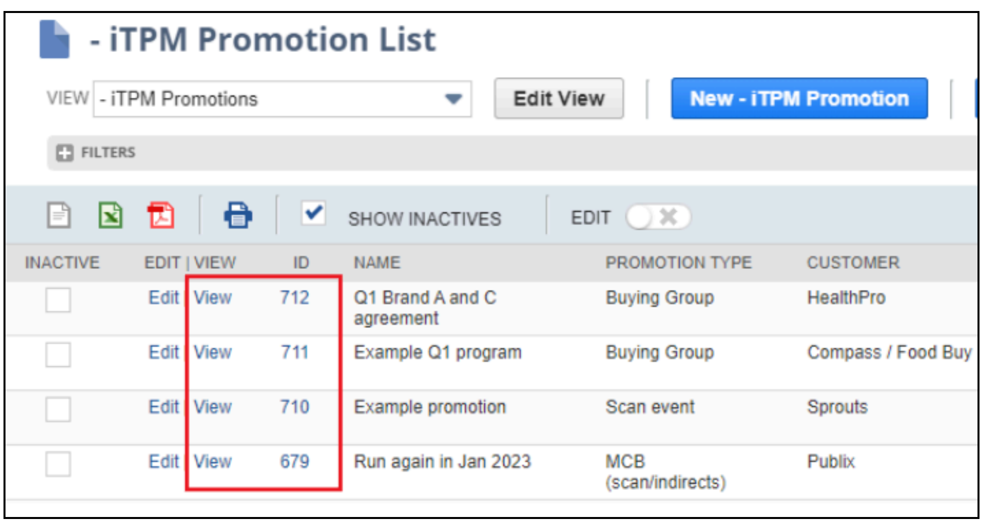



3. **Click the 'plus'**  **and set your filters**






4. **Find the promotion you want to view, and click *VIEW or the promotion ID***



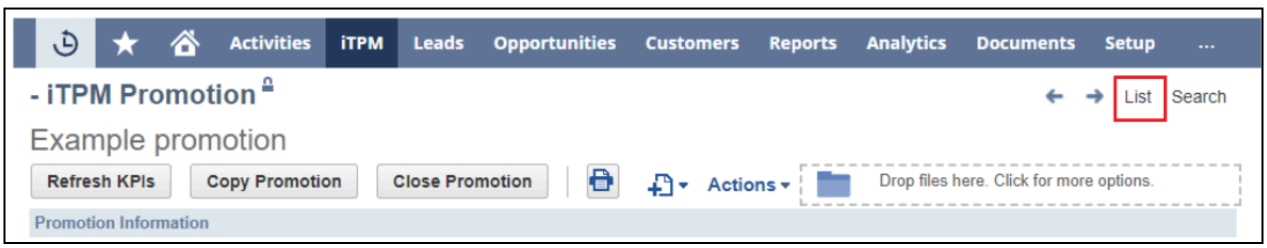
**Helpful Hint:** Use % as a wildcard when you search. Example: You want promotions that have "BOGO" in the title, but the title doesn't always start with Bogo. Enter %Bogo into your filter, and NetSuite will show you all promotions that have "bogo" somewhere in the title.

**Helpful Hint: To see promotion workflow buttons, click *VIEW* next to the promotion.**

**If you click *EDIT* from this list, you will NOT see the promotion workflow buttons**, including *SUBMIT, APPROVE / REJECT, CLOSE,* and *VOID*. After editing the promotion, you will return to this list of promotions. (This is standard NetSuite.)

**Two ways to go back to your list of promotions:**

- Go to ***iTPM-> List -> Promotions***
- **Click on List in the upper right corner.**

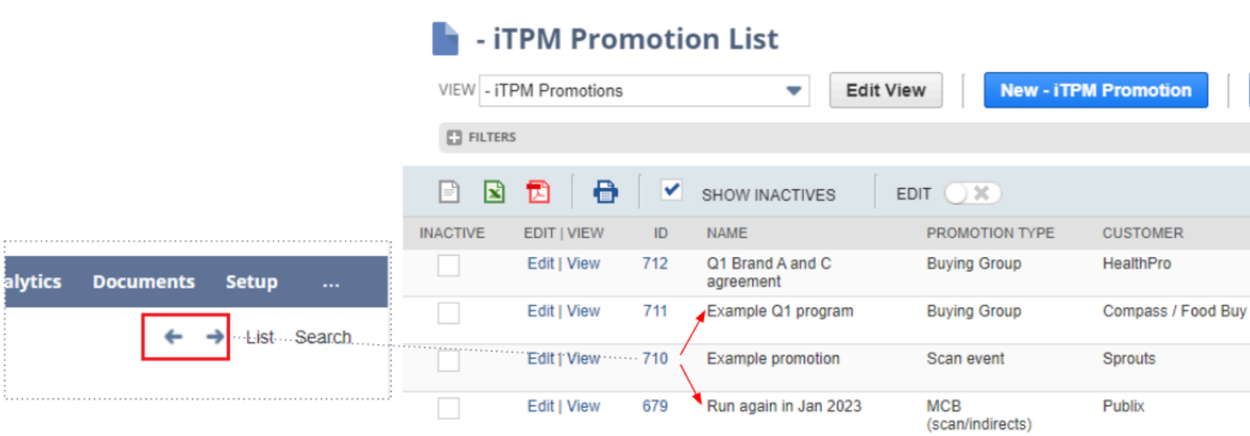



To view promotions in your list, you don't need to go back to the list of promotions.

Use arrows in the upper right corner to move to the next promotion on your list.

Example below:

- If you are viewing promotion 710 and click the left arrow, you will move to promotion 711
- If you are viewing promotion 710 and click the right arrow, you will move to promotion 679



## 2.14 When was my promotion changed? (Change Log)

If you ever need to find out what changes were made to your promotion, ***VIEW*** a promotion and click on the ***System Information* subtab**.

The standard NetSuite change log will show you the following information:

- When was the change made? Date and time of the change in the time zone of Company HQ.
- Who made the change? If the computer made the change, you'll see "System"
- What has changed? You'll see the old value, and the new value.


Additional information available in this subtab:

- Who owns this promotion? This is the person that can make changes.
- When was this created? Date and time of the change in the time zone of Company HQ.
- When was it last changed? Date and time of the change in the time zone of Company HQ.

Sometimes you may need to *DELETE* your promotion. The checkbox in this subtab will make the promotion *INACTIVE*. A script that runs every night will finish the process and delete all the *i*TPM inactive records. If the promotion does not have any settlements you can also use the ***Void or Change*** button. Voided promotions have a Delete Promotion button.

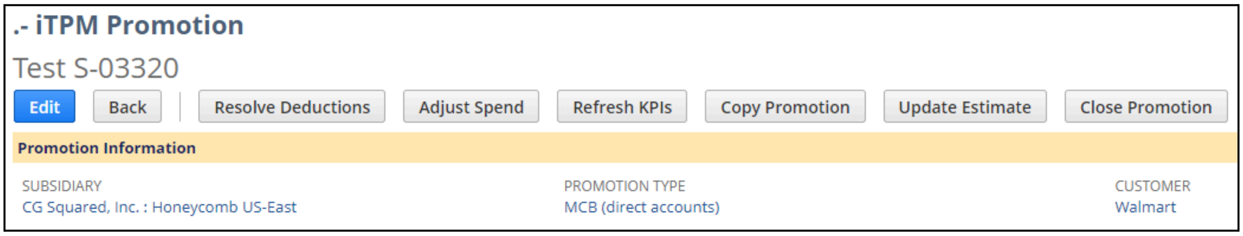
**Helpful Hint:** Based on your role and workflow rules, *i*TPM will prevent users from editing a promotion. If you can't EDIT the promotion, try the VOID or CHANGE button. If you can void your promotion, then you can use the BACK-TO-DRAFT button. Once in draft status, you can make changes to promotions you 'own'.

This workflow is done to maintain data integrity. For example, non-admin users should never be able to delete a completed promotion that has settlements. See promotion workflow for more details.

## 2.15 How to true up/ true down my promotion's estimated spend?

If you need to update the estimated quantity and/ or the Lump Sum in an approved promotion, if your role has the appropriate permission, you can use the UPDATE ESTIMATE button on the promotion.

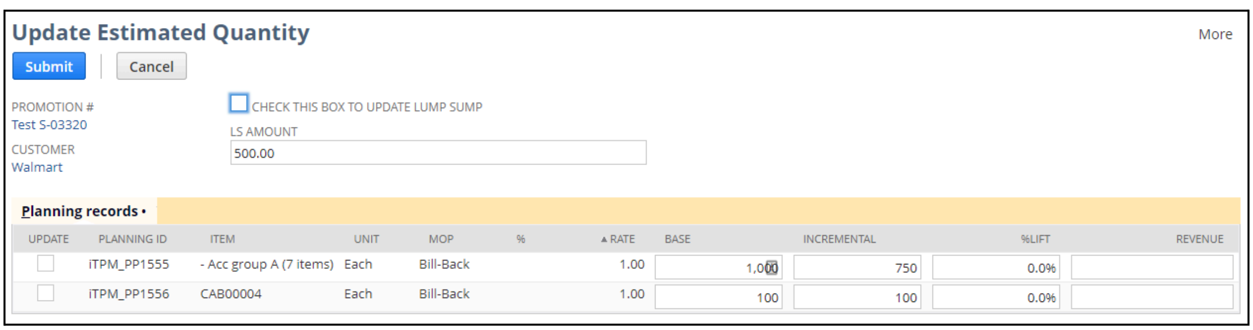
Step 1: View the promotion, and click on the **UPDATE ESTIMATE** button.




**Helpful Hint:** If you don't see the UPDATE ESTIMATE button on your approved promotion, your role may not have the necessary permissions to use this feature, or there may be a change pending approval.

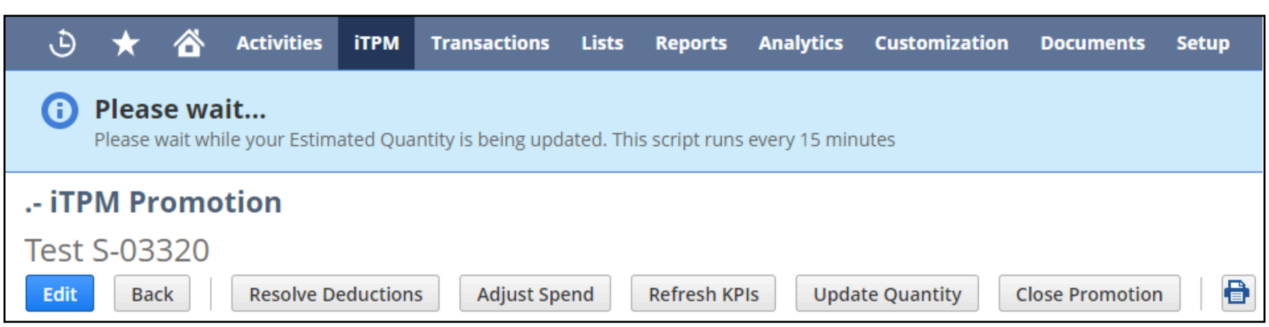
**Helpful Hint:** You can't change a lump-sum if there was no lump-sum approved on your promotion. To add a lump-sum, have someone with permissions to add it, or use the Void or Change button, go back to Draft status and re-submit your promotion with a lump-sum.

Step 2: Enter the new values, and be sure to check the "update" checkbox in that row.

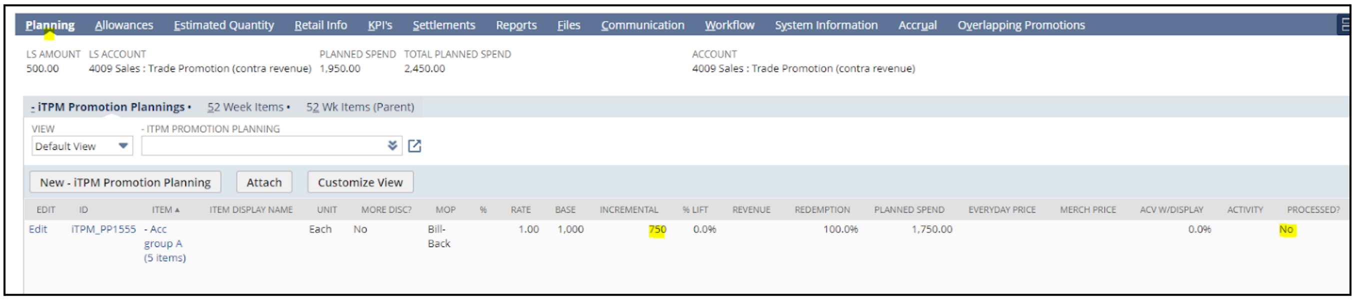



Step 3: Wait for your changes to be applied to the promotion.

Until your changes are applied, you will see a banner on the promotion… please wait.

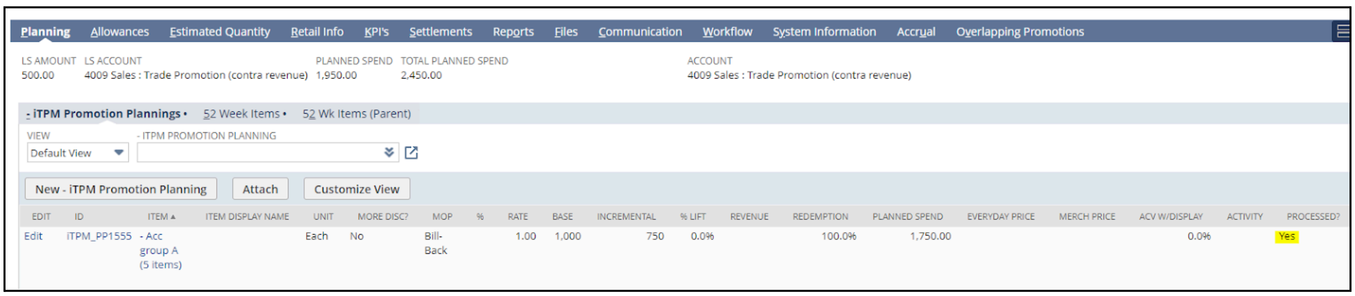


Until your changes are applied, you will see your changes but "*Processed?*" status will be "NO"

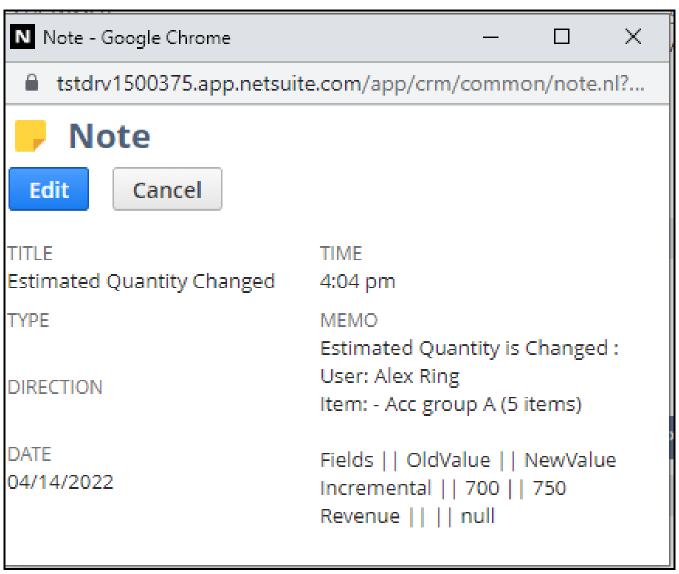


In about 15 minutes your promotion KPIs will be updated and there will be no banner.

You will notice that under the Planning subtab, the *"Processed?"* status will be changed to "YES".



A note is also created documenting the change.  To view it, go to the ***Communication*** subtab on the promotion.

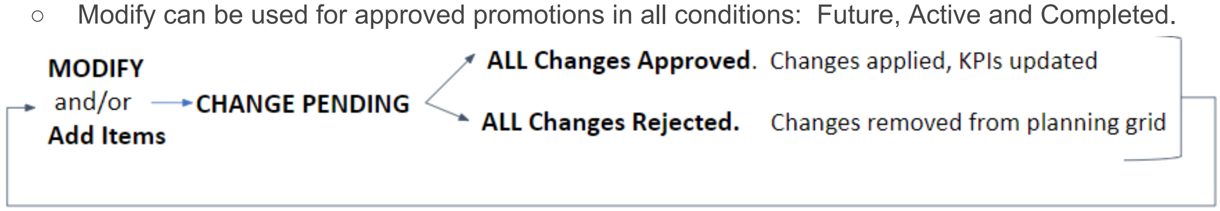



**Helpful Hint:** If you need to update the estimated volume for a large number of promotions, the NetSuite Admin and iTPM Support Admin roles can use a NetSuite CSV import to mass-update the base, incremental, % lift and/or revenue of approved promotions.

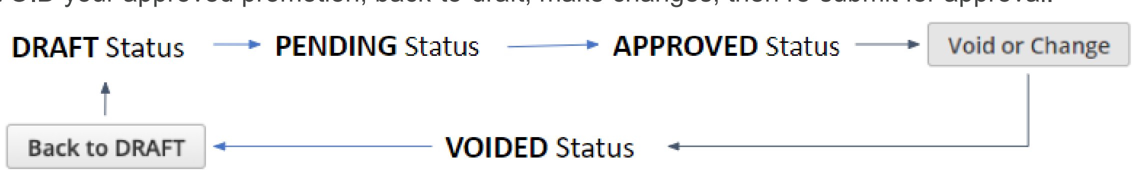
## 2.16 Changes to approved promotions

There are many ways to make changes to approved promotions. Some changes to approved promotions require additional role permissions. Contact your *i*TPM Administrator if you need access to these *i*TPM features:

- QUICK EDIT **button**
  - **Use this feature to make minor changes** to your promotion, like changing the description.
  - These changes do not require a KPI refresh, and by design do not trigger a KPI refresh.
- UPDATE ESTIMATE **button**
  - **Use this to true up or down your estimated volume**
  - Changes do NOT require approval.
  - You can only change the lump-sum and/or estimated volume.
- MODIFY button
  - **Use this to change the discount rates and lump sum in your approved promotion**.
  - Like the UPDATE ESTIMATE button, you also have the option to change estimated volume.
  - Changes using the MODIFY button require approval.
  - Modify can be used for approved promotions in all conditions: Future, Active and Completed.




- Add an item or item group:
  - **Use this to add items and/or item groups to your promotion**
  - Adding items to an approved promotion requires approval.
  - Look for **New - iTPM Promotion Planning** button under the *Planning* subtab.
- CHANGE PENDING button
  - **Use this button to see the changes you requested to the approved promotion.**
  - The grid shows you the old value and the change you are requesting.
  - Item Groups are expanded into items under the allowances subtab the same way Process Plan does for draft promotions.
- APPROVE ALL, REJECT ALL buttons in the *Changes Pending* form.
  - **Use these buttons to approve or rejected changes**
  - Buttons are visible only if your role has permission to approve and reject changes
- VOID or CHANGE button, then BACK-to-DRAFT button
  - **Use this to start over again.**
  - You can't do this if the promotion has any settlements or accruals
  - This will take longer to process, and require you to re-submit the promotion for approval.
  - VOID your approved promotion, back-to-draft, make changes, then re-submit for approval.

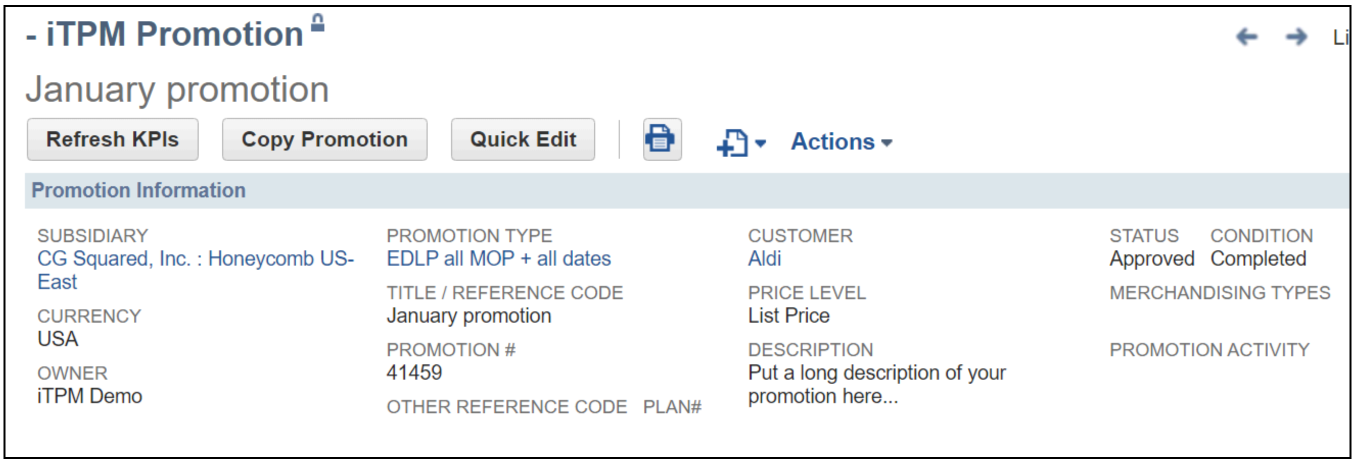


## QUICK EDIT

The *Quick Edit* button enables you to make changes to your approved promotion that don't impact any of the financial aspects of the promotion.

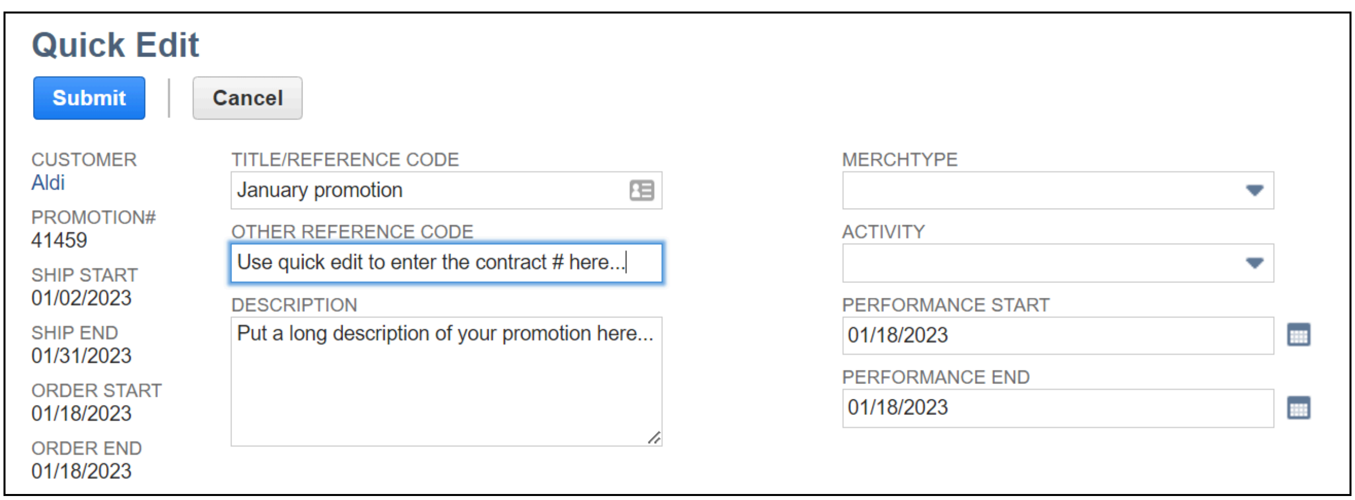
Unlike the EDIT button, the *Quick Edit* button does not cause the KPIs to be refreshed, and it does NOT cause any delay for resolving deductions to the promotion. For example, use this to put the customer's scan contract # into the "*Other Reference Code*" in the promotion.

You'll see the *Quick Edit* button while viewing your promotion if you are the owner of the promotion, or if your role has permission to edit other people's promotions.




Here are the steps:

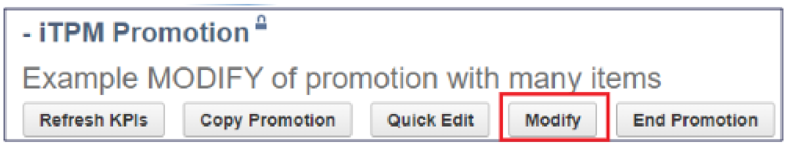
- ***VIEW*** the promotion.
- Click on the ***QUICK EDIT*** button.
- Enter the changes to your promotion, then
- Click ***SUBMIT***.



**MODIFY button**

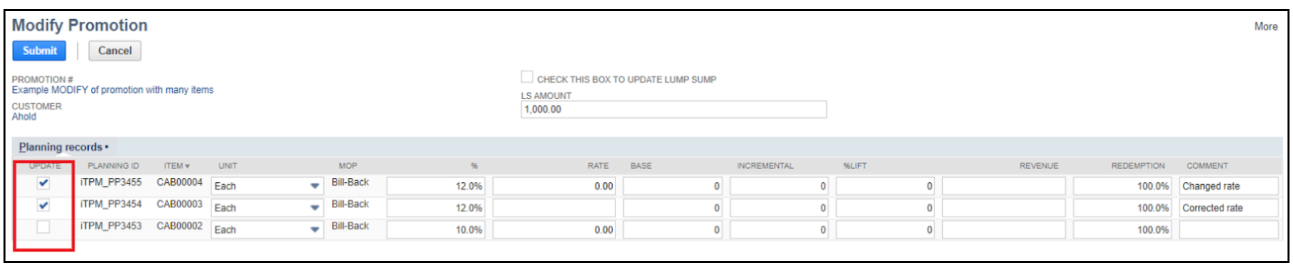
If your role has Modify permissions, you may see the ***MODIFY*** button when viewing the promotion.

- **Use this to change the discount rates and lump sum in your approved promotion**.
- Like the UPDATE ESTIMATE button, you also have the option to change estimated volume.
- Changes using the MODIFY button require approval before they are applied to the promotion.
- You will see the MODIFY button on an approved promotion,
  - If you are the owner of the promotion, or…
  - If you are the sales representative of the promotion's customer, or…
  - If you are the broker partner for this customer, or …
  - If your role has admin permission to edit other people's promotions.

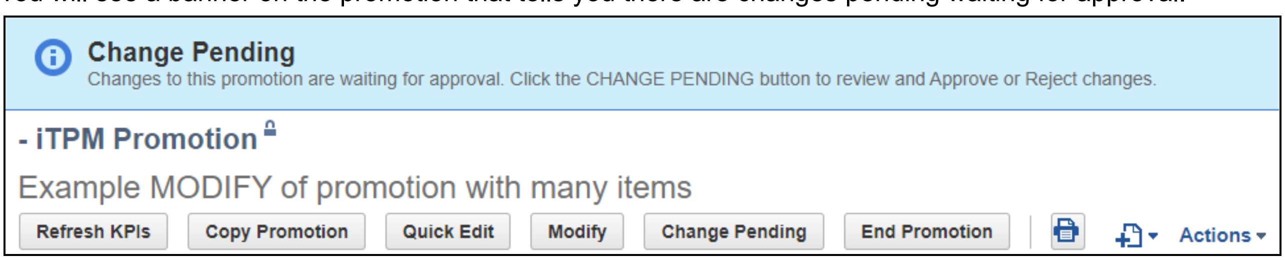



Here are the steps to make changes to an approved promotion:

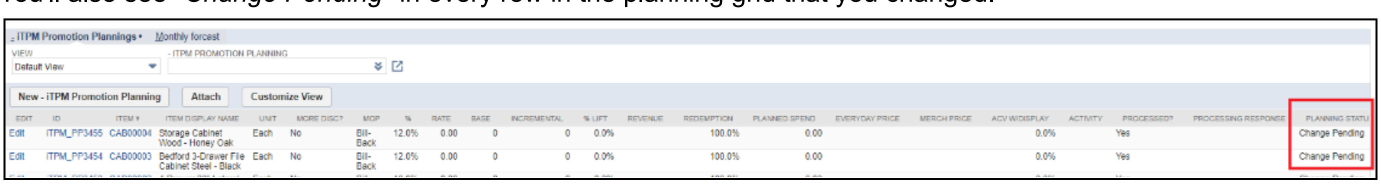
1. **VIEW** your promotion.
2. Click the ***Modify*** button on the promotion.
3. **Enter your new values:**
   - Rate, Unit-of-Measure for the rate, estimated quantity, etc.
   - You can clear out values and set them to 'null' or blank if needed.
   - **Check the *UPDATE* checkbox in every row you want to change**




4. When done with your changes, click the ***SUBMIT*** button.
   You will see a banner on the promotion that tells you there are changes pending waiting for approval.




You'll also see "*Change Pending*" in every row in the planning grid that you changed.



**Add items (*New - iTPM Promotion Planning* Button)**

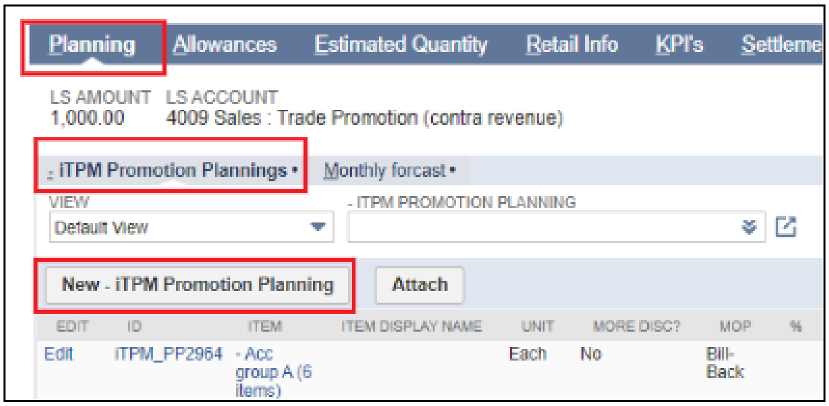
If your role has appropriate permissions, you will be able to add items to approved promotions.

- After you add an item, you can also use the ***MODIFY*** button to make changes to it.
- Each item or item group is included in the promotion KPIs ONLY after the change is approved.

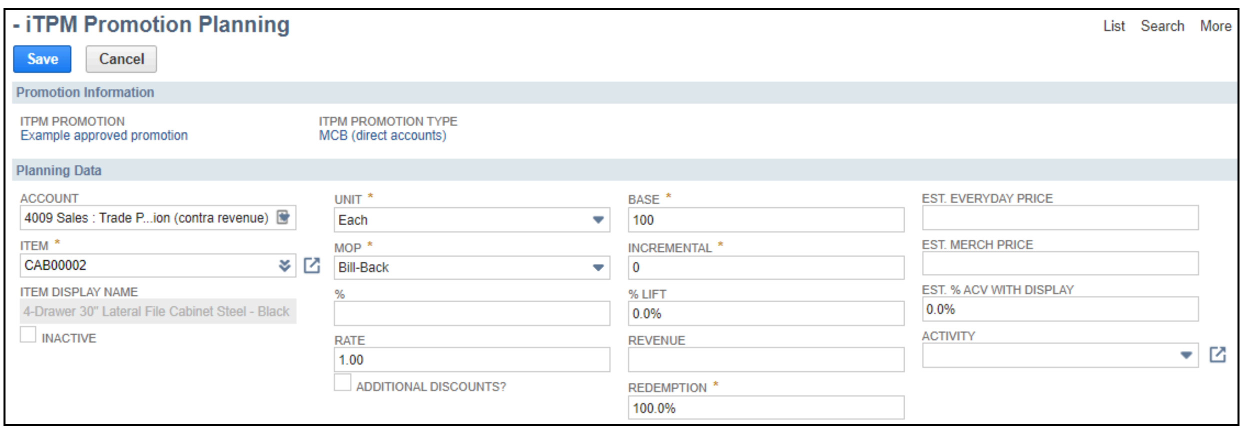
Here are the steps to add an item or item group to an approved promotion:

1. ***VIEW*** your promotion.
2. Click on the 

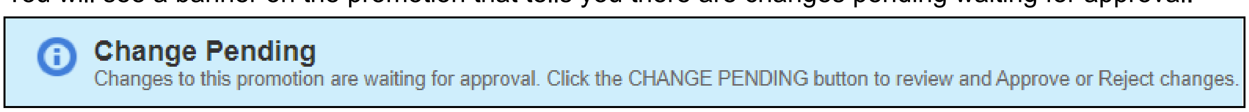
button under the *Planning* subtab.



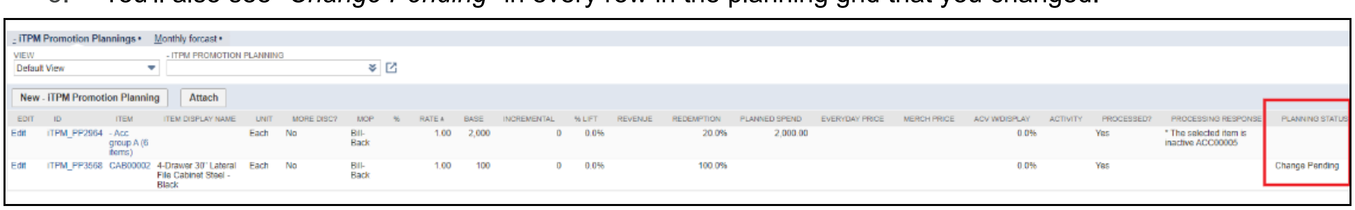

3. Enter data into the form in the same way you [enter data](#) into the grid under the Planning subtab.




4. When done, click ***SAVE***.
   You will see a banner on the promotion that tells you there are changes pending waiting for approval.




5. You'll also see "*Change Pending*" in every row in the planning grid that you changed.



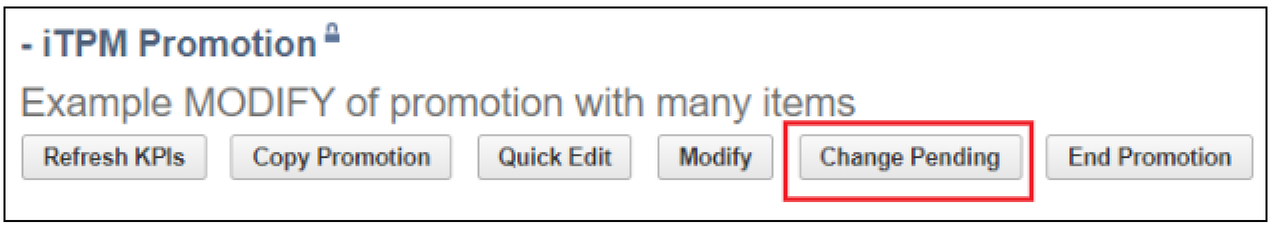
### CHANGE PENDING Button

If the promotion has any change pending, you'll see this banner on the promotion:

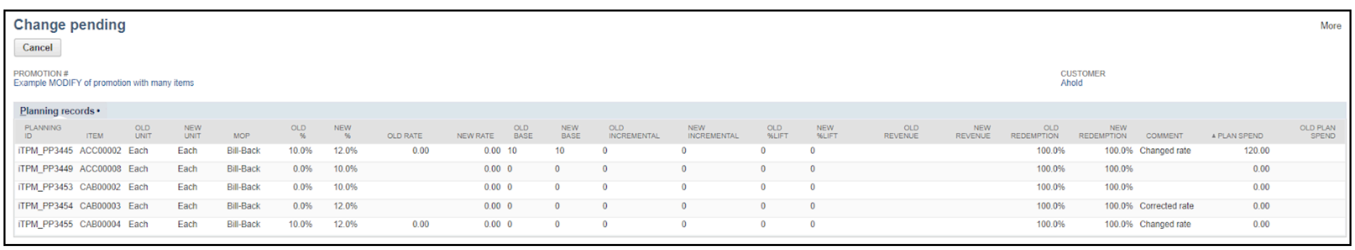

- **Use the CHANGE PENDING button to see the changes you requested in your approved promotion.**
- The grid shows you the old value and the change you are requesting.
- If your role has permissions to approve changes in the promotion, you'll also see the ***Approve ALL*** and **Reject ALL** buttons in this form.

Here are the steps to make changes to an approved promotion:

1. ***VIEW*** the promotion.
2. Click the ***CHANGE PENDING*** button.




3. Review your changes. You can compare the OLD value to the NEW changed value.


Change pending

Cancel

More

PROMOTION #
Example MODIFY of promotion with many items

CUSTOMER
Ahold

Planning records •

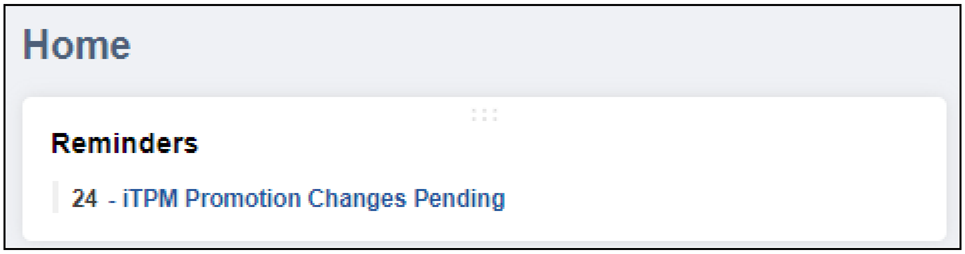
| PLANNING ID | ITEM | OLD UNIT | NEW UNIT | MOP | OLD % | NEW % | OLD RATE | NEW RATE | OLD BASE | NEW BASE | OLD INCREMENTAL | NEW INCREMENTAL | OLD %LIFT | NEW %LIFT | OLD REVENUE | NEW REVENUE | OLD REDEMPTION | NEW REDEMPTION | COMMENT | ▲ PLAN SPEND | OLD PLAN SPEND |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 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_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. Click ***CANCEL*** to go back to viewing the promotion.

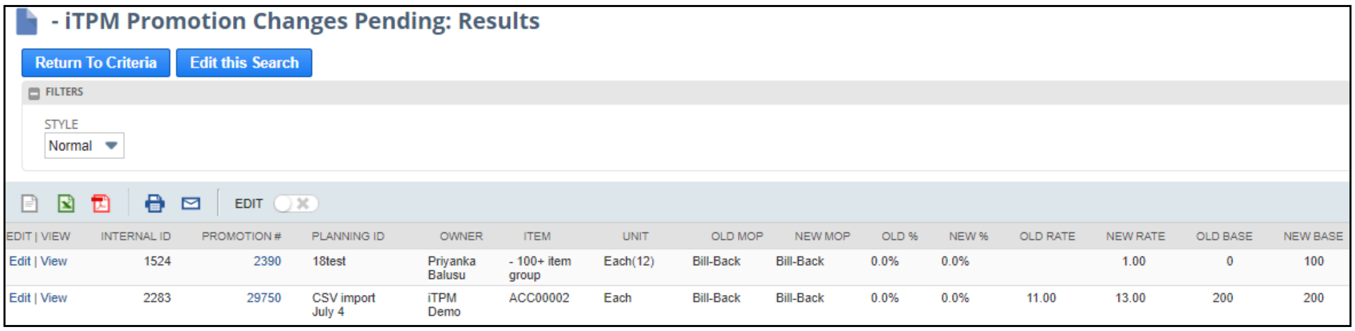
> **Helpful Hint:** If you need to make more changes, or if you made a mistake in one of your changes, you can use the *MODIFY* button again.

**Dashboard Reminder: Promotion Changes Pending**

You can add a reminder to your dashboard called "- iTPM Promotion Changes Pending"




- This reminder gives you a list of all approved promotions with changes pending



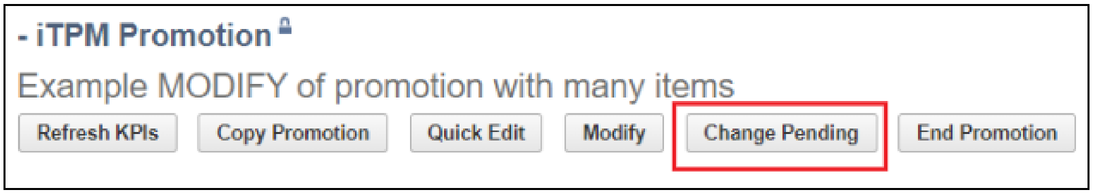

| EDIT \| VIEW | INTERNAL ID | PROMOTION # | PLANNING ID | OWNER | ITEM | UNIT | OLD MOP | NEW MOP | OLD % | NEW % | OLD RATE | NEW RATE | OLD BASE | NEW BASE |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Edit \| View | 1524 | 2390 | 18test | Priyanka Balusu | - 100+ item group | 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 |

**Change Pending, Approval ALL, Reject ALL**

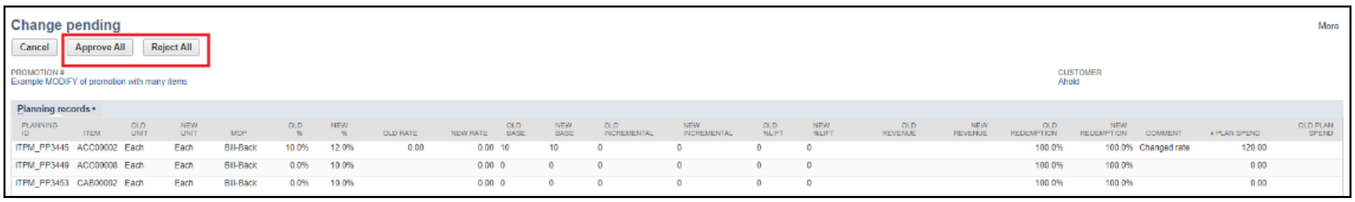
- **Use the CHANGE PENDING form to review pending changes before you approve them.**
- This is the same form that is used by non-approvers to review changes they make to the promotion.
- The grid shows you the old value and the changed value that is pending approval.
- ***Approve ALL*** and ***Reject ALL*** buttons are visible only if your role has permission to approve changes.

Here are the steps to review, approve or reject, and apply changes to approved promotions:

1. ***VIEW*** the promotion.
2. Click the ***CHANGE PENDING*** button.



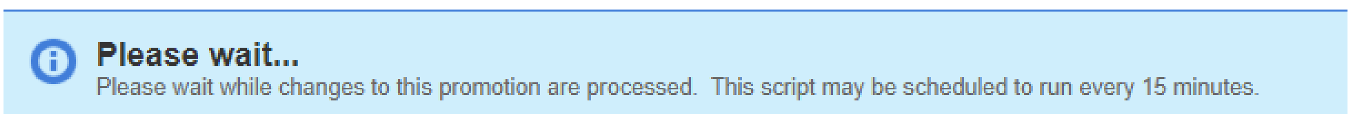

3. Review your changes.  You can compare the OLD value to the NEW changed value.



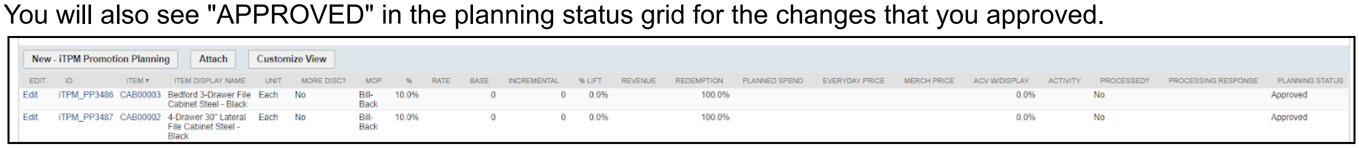

| PLANNING ID | ITEM | OLD UNIT | NEW UNIT | MOP | OLD % | NEW % | OLD RATE | NEW RATE | OLD BASE | NEW BASE | OLD INCREMENTAL | NEW INCREMENTAL | OLD %LIFT | NEW %LIFT | OLD REVENUE | NEW REVENUE | OLD REDEMPTION | NEW REDEMPTION | COMMENT | * PLAN SPEND | OLD PLAN SPEND |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 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 | |

4. If you do NOT agree with the changes, click the ***REJECT ALL*** button.
   Changes will be removed from the planning grid, and the planning status will be *Rejected.*

5. If you agree with the changes, click the ***APPROVE ALL*** button.
   You will see a "***Please wait while changes are processed***" banner while your changes are applied.




You will also see "APPROVED" in the planning status grid for the changes that you approved.




| 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 |

**Helpful Hint:** Instead of rejecting all changes, you have the option to use the MODIFY button to make changes to the promotion so that you can use the Approve ALL button.

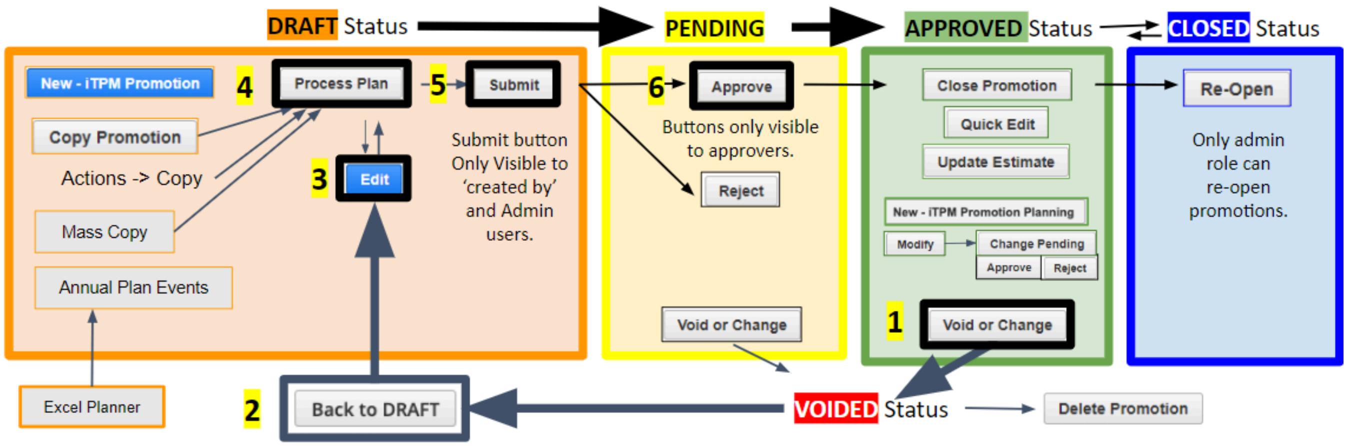
**Helpful Hint:** You can take your time reviewing changes. No changes will be applied to your approved promotion until you click APPROVE ALL.  While the changes are pending approval, approved promotions are available to apply off-invoice to sales orders, and resolve deductions.

**VOID OR CHANGE button, then BACK-to-DRAFT button**

If you have many changes to make to your promotion, you can go back to draft status and start over.

- Note: You can't do this if the promotion has any settlements or accruals
- Changing promotions this way is more complicated and has more steps.
- This will take longer to process, and require you to re-submit the promotion for approval.

**Note:** While your promotion is back in DRAFT status, it is NOT available to apply off-invoice to sales orders and resolve deductions.
To prevent an interruption in applying off-invoice and in resolving open deductions, use the MODIFY button instead of this approach.




Here are the steps to start over:

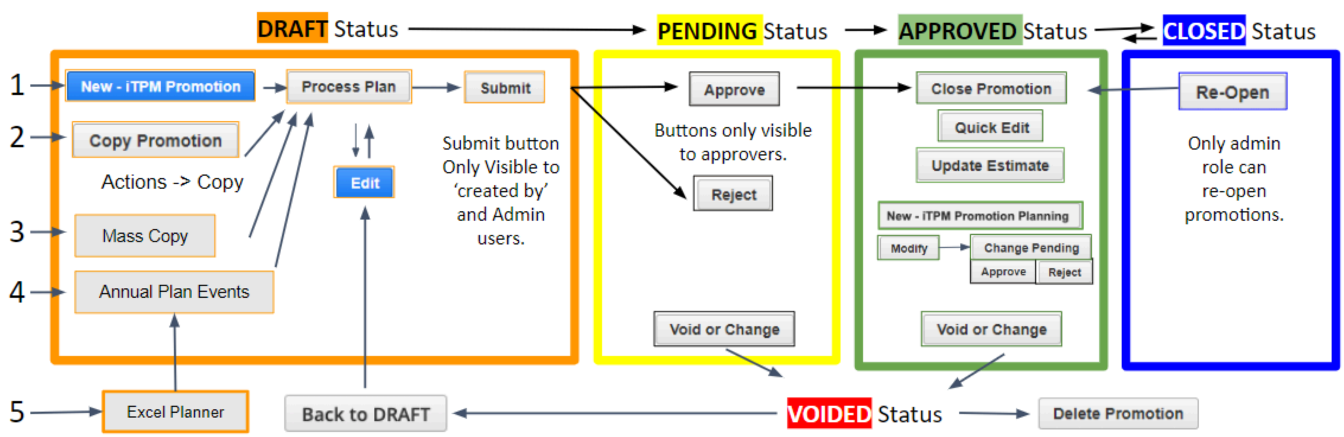
1. Click the ***Void or Change*** button**.** Your promotion will change to *VOIDED* status.
2. Click the ***Back to DRAFT*** button. Your promotion will change to *DRAFT* status.
3. ***EDIT*** your promotion and make changes.
4. Click the ***PROCESS PLAN*** button. (optional)
    a. Some changes to the promotion do not require *Process Plan*.
    b. If *Process Plan* is required, you'll see a banner telling you to click *Process Plan.*
    c. *Process Plan* automatically runs overnight, even if you don't click the button.
    d. KPIs will be updated after *Process Plan* runs.
    e. When done, you will not see the "*Run Process Plan*" banner and you'll see the submit button.
    f. You can track the status of your promotion with your dashboard reminders.
5. When *Process Plan* is complete, click the ***SUBMIT*** button.
6. If your promotion didn't auto-approve, an approver will click the ***APPROVE*** button.

# 3.0 Promotion Workflow

Promotions start in *DRAFT* status. Promotions are *SUBMITTED* for approval. *APPROVED* promotions are *CLOSED* when all settlements for this promotion are completed.

There are 5 different ways to get started and create one or more promotions:

1. ***iTPM -> Promotions -> List -> New***
2. View an existing promotion, then click ***Copy Promotion***.
3. ***iTPM -> Promotions -> Mass Copy***
4. ***iTPM -> Annual Plan -> Plan Events*** (Details in the *Annual Planner User Guide*)
5. ***CSV Import events from an Excel Spreadsheet*** (Details in the *Annual Planner User Guide*)




Note: Promotion workflow and visibility of these buttons are controlled by NetSuite role permission and promotion condition.

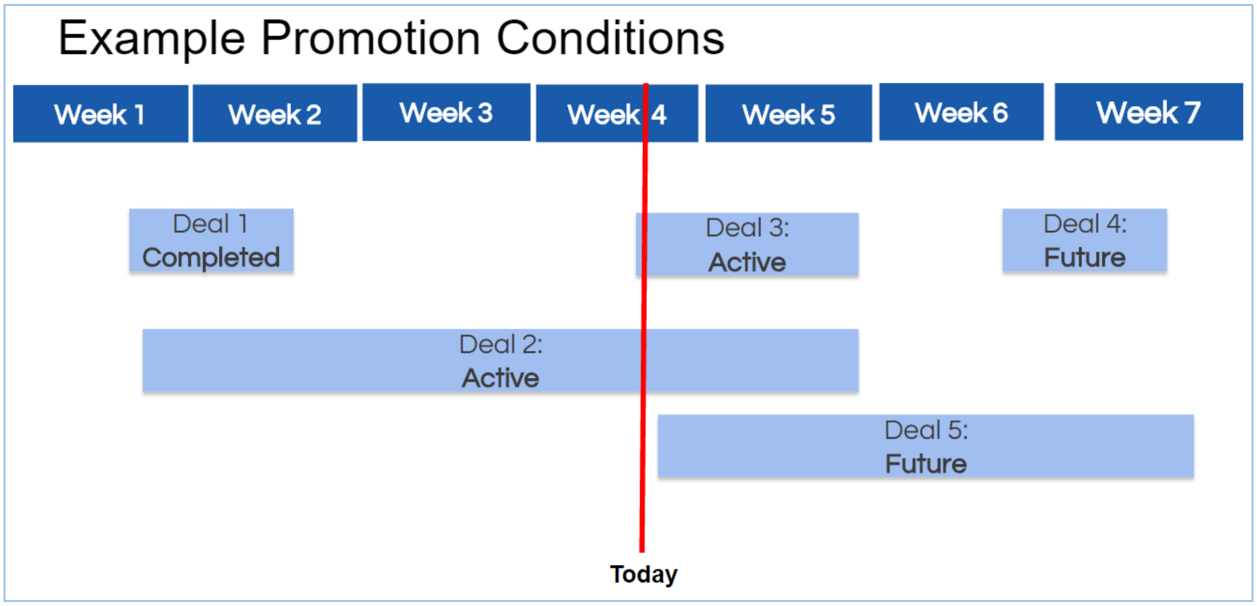
**Helpful Hint:** Your NetSuite role permissions may not allow you to see some or all of these promotion work-flow buttons. Examples:

- You'll need extra permission to edit promotions created by other people.
- EDIT of promotions has limitations when the promotion is active or completed condition. Use QUICK EDIT to make changes that don't require approval, like 'Other Reference Code'.
- If you have an approval role, you need extra permissions to approve back-dated promotions, promotions that you created, and the estimated spend of the promotion may exceed your approval threshold.

- **Why do we have to close approved promotions when they are done?** Closing a promotion tells *i*TPM that you don't expect any more payments or settlements. If there's anything outstanding for the promotion, the unused funds are released to your trade budget.
- **Need to go backwards in the workflow?** Use the *VOID or Change* button for promotions that haven't started yet. For *Closed* promotions, *REOPEN* them to move them back to *APPROVE* and available for settlements. (ReOpen is only available to NetSuite and *i*TPM Administrators)
- **Need to change an approved promotion?** If your role has the appropriate permissions, use the *UPDATE ESTIMATE* button to true up or down your volume estimate. To change rates and more, use the *MODIFY* button. The *CHANGES PENDING* button is used to approve changes to approved promotions.
- **Why isn't the *VOID or CHANGE* button visible?** If you have settlements matched to your promotion or qualifying transactions, you will not be allowed to *void* the promotion.

## 3.1 Promotion Condition

**Promotion condition compares today's date to your promotion's ship dates.** Use promotion condition to focus your efforts on the appropriate tasks as your promotion moves through its lifecycle, from start to finish:




| Promotion Condition | Description | What tasks should you be doing? |
|---|---|---|
| Future | Deal hasn't started | • Make sure you've submitted every promotion for approval.<br>• *Void* any promotions that will not happen,<br>• To re-submit promotions that have changed, click *VOID or CHANGE*, then use *BACK TO DRAFT*. You can *EDIT* and change draft promotions. Submit it again for approval. |
| Active | Deal started but isn't over yet. | • Track what's happening using the KPI subtab.<br>• Optional: Attach any retail execution pictures or other information to document your promotion results<br>• If your promotion is not correct, you can use the *END PROMOTION* button to change the end dates to today. You can create a new corrected promotion starting tomorrow.<br>• For changes to approved promotions, use the **MODIFY** button. |
| Completed | Deal has ended. | • Track payments and settlements matched to your promotion using the KPI subtab.<br>• Change the status to *CLOSED*, but only when you are certain that all payments and settlements have been processed. |

**Helpful Hint! Add notes to your Active and Completed promotion!** Add notes to let stakeholders know more about your promotion. Did the retailer accept the deal? What type of retail execution did you see? Attach a copy of the ad and/or a picture of the display.

## 3.2 Promotion Status

Use promotion **status** to manage your promotions from start to finish:

| Status | Promotion Status Description | What can I and can't I do? |
|---|---|---|
| **Draft** | All promotions start in *draft* status. Promotions stay in *draft* status until the user is ready to either *submit* them for approval, mark them as *inactive*, or void them. | **DO**: Submit your *draft* promotion for *approval*.<br>**DO**: You can VOID a *draft*, future promotion.<br>**DO:** Use Back-to-Draft, or Delete the voided promotion. |
| **Pending Approval** | Promotions in *pending* status have been submitted for approval, but have not yet been approved or rejected.<br>Note: Promotions in *draft* and *pending* status are still **NOT** 'official' *i*TPM promotions. These promotions don't incur promotional liability, and off-invoice allowances are **NOT** applied to orders. | **DO**: Approvers, review submitted promotions and change status to *approved* or *rejected*.<br>**DO**: Approvers, do a timely review of submitted promotions. Promotions should only be in the *pending* status for a short time.<br>**DO**: Approvers, use a NetSuite portlet on your dashboard to show you a list of promotions pending approval. |
| **Approved** | Promotions that are approved are available to incur promotional liability. *i*TPM keeps track of every invoice (or purchase) that may qualify for the allowances and discounts. | **DO**: When all payments and settlements are processed, change the status to *closed*.<br>**OPTION**: You have the option to void an approved deal, but ONLY if the promotion hasn't started and there are no transactions matched to it.<br>**OPTION**: You need to be a NetSuite or *i*TPM administrator to edit or change an approved, active promotion.<br>**OPTION**: Use the MODIFY button to make changes to your approved promotion. |
| **Closed** | Closing a promotion tells *i*TPM that all financial settlements are complete, and that any unpaid amounts will not be paid. Closing a promotion sets its net liability to zero, resulting in additional trade monies becoming available to the trade budget. | **OPTION**: Change the status back to *approved* if you have additional payments or settlements to clear. To do this, ***REOPEN*** the promotion, match the deduction to the event, and then *CLOSE* the promotion. Only *i*TPM administrators have the permissions to REOPEN a closed promotion. |
| **Rejected** | Rejected promotions do not incur any promotion liability, and are not available for settlements. | **DO**: Edit your *rejected* promotion, make appropriate changes and submit your changed promotion for approval. |
| **Voided** | Like the rejected status, voided promotions do not incur any liability, and are not available for settlements. | **OPTION**: You can void a promotion if it's not going to happen. You can use the Back-to-Draft to make changes and start over again. |

## 3.3 Approver: Approve or Reject Deals

If you are a promotion approver in *i*TPM, you will see the Approve and Reject buttons on future promotions submitted for approval if your role is authorized to approve the level of estimated spending, back dated promotions, and/or promotions created by you.

> **Helpful Hint:** To see the Approve or Reject buttons, you must VIEW the promotion, not EDIT. As an approver, you may not be given permission to edit promotions.

You will be able to *Approve* or *Reject* promotions when:

- **The promotion has been submitted** and is in *Pending Approval* status, ***and.***
- ***Estimated Spending is equal or less than your spending approval level.***
- **Note: Some promotions may be configured to auto-approve and skip this step!**

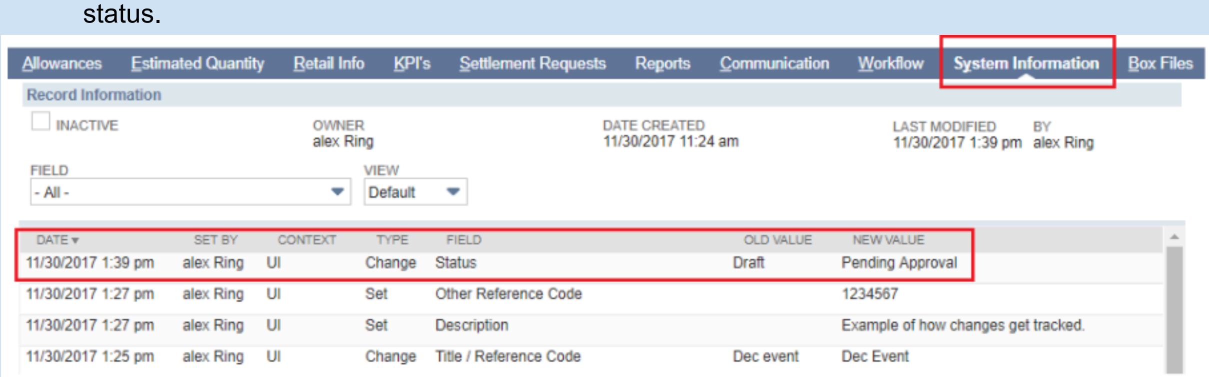
Extra role permissions:

- Your role needs extra permission to approve **back-dated promotions**. (Active & Completed)
- **If you are the owner of the promotion**, your role needs extra permission to Approve it.
- You'll also need extra role permissions if you want to edit and submit other people's promotions.
- The permissions in your NetSuite role determine what you can and can't do in *i*TPM.

> **Note: It can take 15 to 30 minutes before your *APPROVED* promotion is available for settlements.** After your promotion is approved, *i*TPM calculates allocation factors needed to spread your settlements to the items in your promotion. Your promotion is available for settlements when you see the *RESOLVE DEDUCTIONS* button on your promotion.

> **Helpful Hint:** Add notes to the promotion to document your insights for everyone that will touch this promotion throughout the promotion's life cycle.

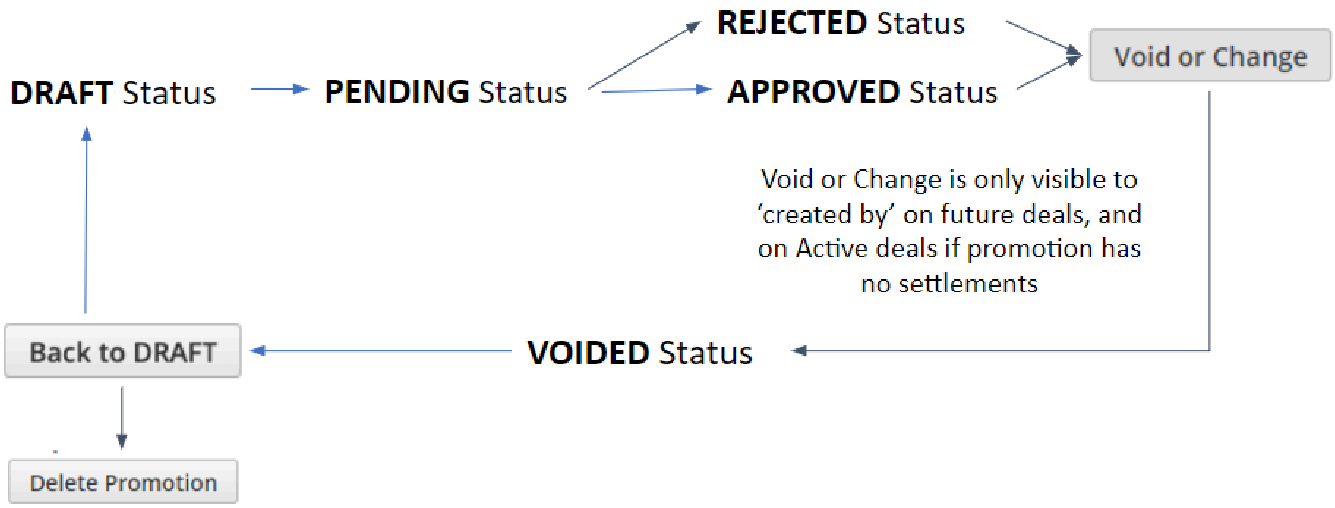
> **Helpful Hint:** Use Netsuite's change log as an **audit trail** to see the history of this promotion, including who approved or rejected the promotion. To see the audit trail, go to the *System Information* subtab. The box below highlights the change from *DRAFT* to *Pending Approval* status.




| DATE ▾ | SET BY | CONTEXT | TYPE | FIELD | OLD VALUE | NEW VALUE |
|---|---|---|---|---|---|---|
| 11/30/2017 1:39 pm | alex Ring | UI | Change | Status | Draft | Pending Approval |
| 11/30/2017 1:27 pm | alex Ring | UI | Set | Other Reference Code | | 1234567 |
| 11/30/2017 1:27 pm | alex Ring | UI | Set | Description | | Example of how changes get tracked. |
| 11/30/2017 1:25 pm | alex Ring | UI | Change | Title / Reference Code | Dec event | Dec Event |

## 3.4 Resubmitting Rejected and Voided Promotions

It's easy to resubmit your *rejected* promotion. Click the *VOID OR CHANGE* button on the promotion. The status will go to VOIDED. Use the BACK to DRAFT button on voided promotions to go back to *DRAFT* status, which enables you to edit all fields and subtab data. If the now modified promotion is a valid promotion, the *SUBMIT* button will be visible. If you make changes to the planning rows, you'll need to use the PROCESS PLAN button to update your allowances, estimated quantities, etc.




**Only roles with an extra permission are allowed to *APPROVE* back-dated promotions.** Backdating a promotion occurs when a promotion needs to be submitted or approved that is already active or completed. Here are some of the reasons you may want to back-date a promotion:

- Your salesperson offered a deal to a customer, but forgot to create the promotion in *i*TPM.
- A promotion was submitted for approval before the promotion started, but the approver was on vacation and the deal is now active.
- A promotion was created and approved, but in the wrong subsidiary or to the wrong customer.

**Why don't I see *Approve* and *Reject* buttons on my pending promotion?**

- Only roles with the appropriate permissions will see these buttons.
- Need to approve a promotion but don't see the buttons? Ask your administrator to add the appropriate permissions to your role. (You can also email support@cgsquared.com.)

**Why can't I edit a promotion?** You can't edit a promotion that you didn't create unless you have extra role permissions. However, you can use the **MODIFY** button to make changes to your approved promotion. Section 2.16 has more information on how to make changes to approved promotions.

You can also copy the promotion, and then edit the copy even if you didn't create the original promotion. Some planning roles only allow you to end active promotions using the END PROMOTION button. In some planning roles, no promotion fields are editable for completed promotions.

**Helpful Hint:** Add a note to document what you changed and why you resubmitted it for approval.

## 3.5 Closing Promotions (and Re-Open if needed)

If your role has the appropriate permissions, you will see the 

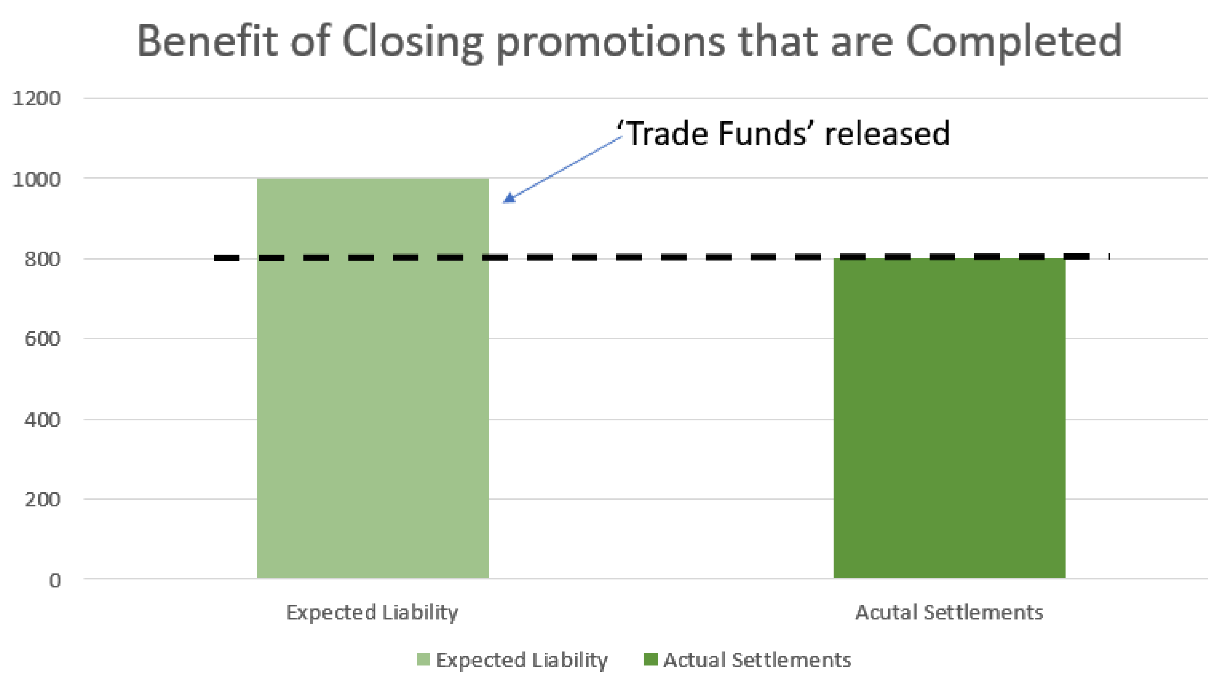
button when your approved deal is completed. When you know all of the settlements are done for your promotion, changing the status to closed will 'release' trade funds that you may be able to redeploy. (Closed promotions can be reopened using the ***REOPEN*** button.)

*i*TPM anticipates that you will eventually have to pay (or the customer will deduct) for any amounts that your promotion financially incurred. *i*TPM helps your finance team set funds aside to cover these promotional costs. Often these *reserves* are called *accruals*. Maintaining reserves for bills that aren't paid prevents financial surprises and negative impacts on your company's financial statements.

Closing the promotion tells *i*TPM that you don't anticipate more settlements, and your finance team should consider this promotion's results final. (Off-invoice in closed-promotions is not applied to sales orders.)

Closing promotions also makes the settlement process easier for the finance team. Closed promotions are not on the list of promotions presented to your team looking for promotions to match to open deductions.

Below is a visual example of a promotion with $800 of Actual Settlements and an Expected Liability of $1,000. Closing this promotion releases $200 of liability, which can be used for other promotions, or dropped to the bottom line as additional profitability. Closing this promotion sets Expected Liability equal to Actual Spending which in this example is $800.

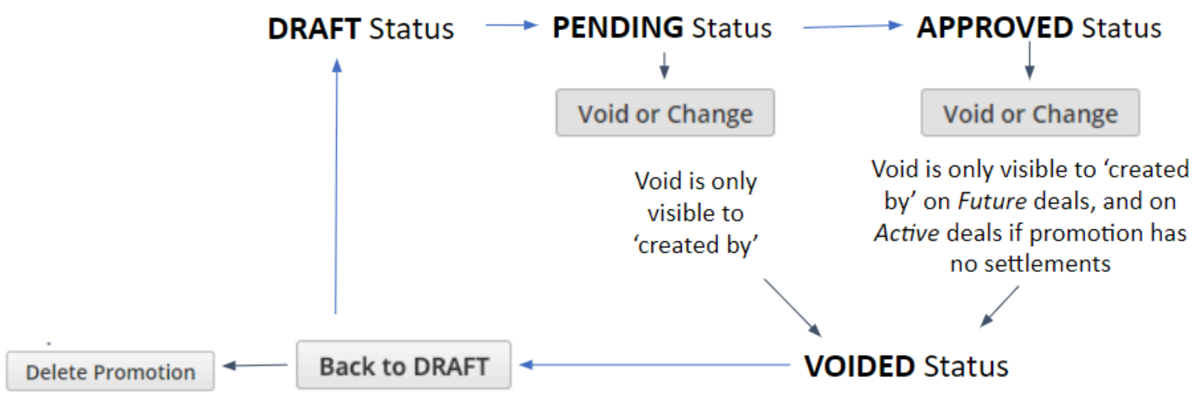



If you need to pay or resolve a deduction to a *closed* promotion, use the ***REOPEN*** button to change the status from *Closed* back to *Approved*. (Extra role permissions are required to Re-Open promotions.)

> **Helpful Hint:** Add a note to the promotion to document why you do not expect any more settlements for your deal.

## 3.6 Voiding vs Ending promotions vs Back-to-Draft

You will only see the ***VOID OR CHANGE*** button when *i*TPM allows you to void your promotion. *i*TPM prevents you from voiding promotions that have settlements, accrual records, and/or used to apply off-invoice discounts. .




If you can't VOID a promotion, you can still stop approved promotions that are already active using the ***END PROMOTION*** button. This will change the end dates of the promotion to today's date. For approved promotions, you also have the option to make changes to approved promotions using the **MODIFY** button.

**To correct or change an *ACTIVE* promotion with actual spending**, the best business practice is to END the promotion by changing the ending dates to today's date. The END PROMOTION button is available to change the ending dates of approved, active promotions. **(NetSuite and *i*TPM administrators and users with the appropriate role permissions can fix data entry errors in active, approved promotions.)**

**Consider using the *BACK-TO-DRAFT* button:** Promotions that don't have any settlements can be voided and set back to draft status. In draft status, you can edit your promotion and resubmit it. Use the "*Void or Change*" button, then click "*Back-to-draft*".

If you need to continue the promotion but with different allowances, create a new promotion or make a copy of the formerly active deal with a starting date of tomorrow and the same end date. This enables *i*TPM to accurately keep track of incurred liability for the original promotion before changes, and for your new promotion that includes your corrections and changes. The settlement module will allow you to pay or clear a deduction for any method-of-payment, including missed off-invoice allowances.

**Why should I END an active promotion to make a change?** Some planning roles are not allowed to change active promotions because a change would retroactively apply back to the beginning of the promotion. *i*TPM calculates expected and maximum incurred liability by looking for shipments that qualify for your allowances, and it does this as soon as the promotion starts. For example, if you change an off-invoice allowance after the promotion started, you'd have missed off-invoice and incorrect calculations of incurred (maximum and expected liability) and paid promotional spending.

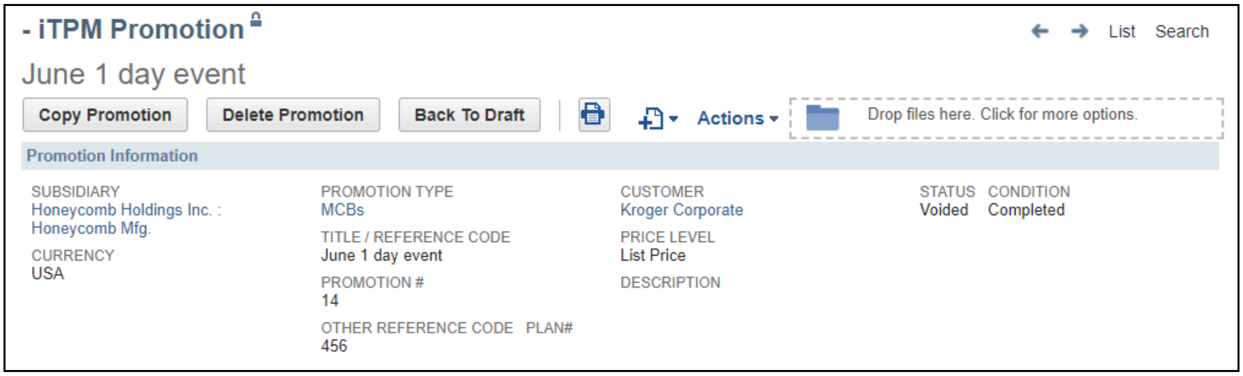
**Why can't I edit a promotion?** *EDIT* will appear next to the promotion in a list. However, if you didn't create the promotion, you can't edit the promotion unless your role has the appropriate permissions

**Why don't I see the VOID or CHANGE button?** If your promotion has settlements, accrual records, or was used to apply off-invoice discounts to a sales order, you will not be able to void your promotion..

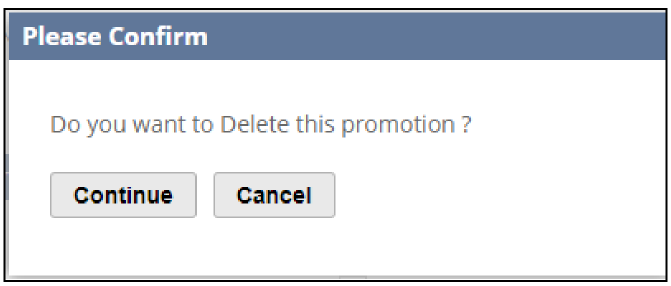
## 3.6 Delete a promotion

You have the option to DELETE voided promotions.
1. ***VOID*** the promotion. (See 3.0 Promotion Workflow for an overview.)
2. Click the "***DELETE PROMOTION***" button.

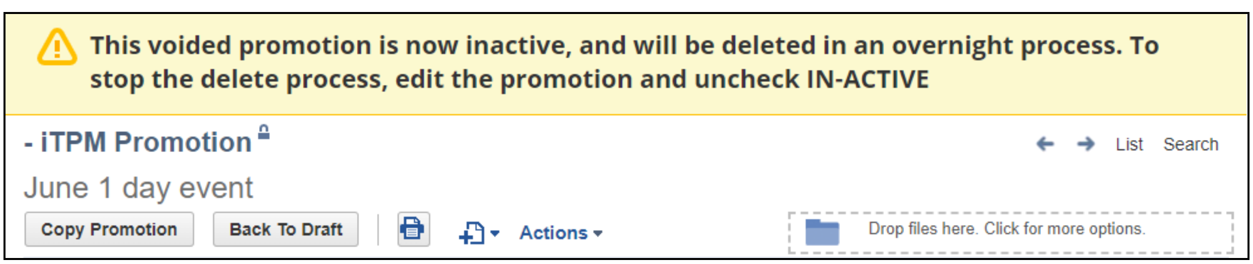
If you are the owner of the promotion, or if your role has permission to edit other people's promotions, then you will see the "DELETE PROMOTION" button on your voided promotion.




3. Click ***CONTINUE*** to confirm you want to delete the promotion.




4. You will see a yellow banner, and an overnight script will delete all related records of the promotion.



# 4.0 Tracking Your Promotion

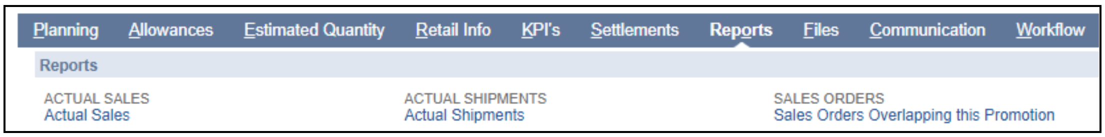
To view a list of promotions, go to section 2.13 How to Find Promotions in a List.

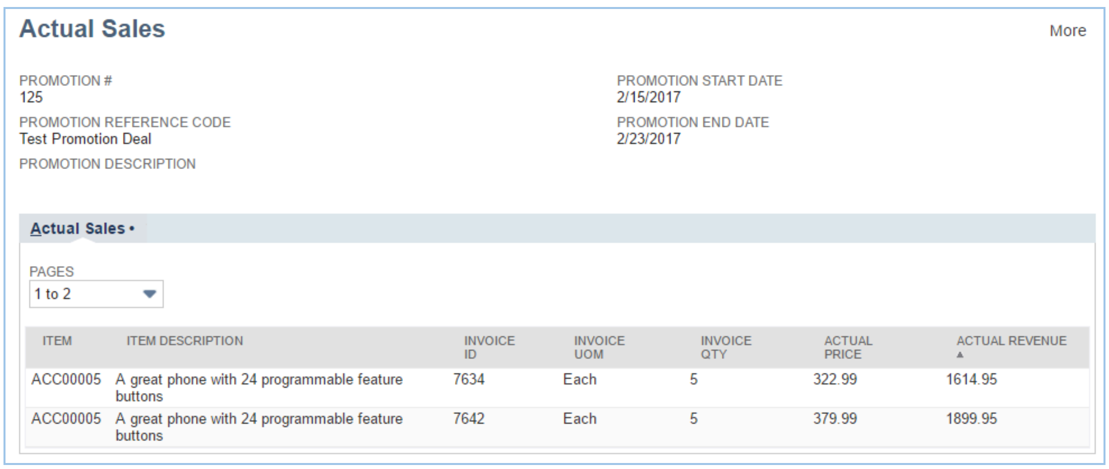
## 4.1 Actual Sales and Shipments

*i*TPM uses actual sales and shipments to calculate KPIs, including Expected and Net Liability. This is done automatically, so there's no need to update Excel spreadsheets or enter actual sales.

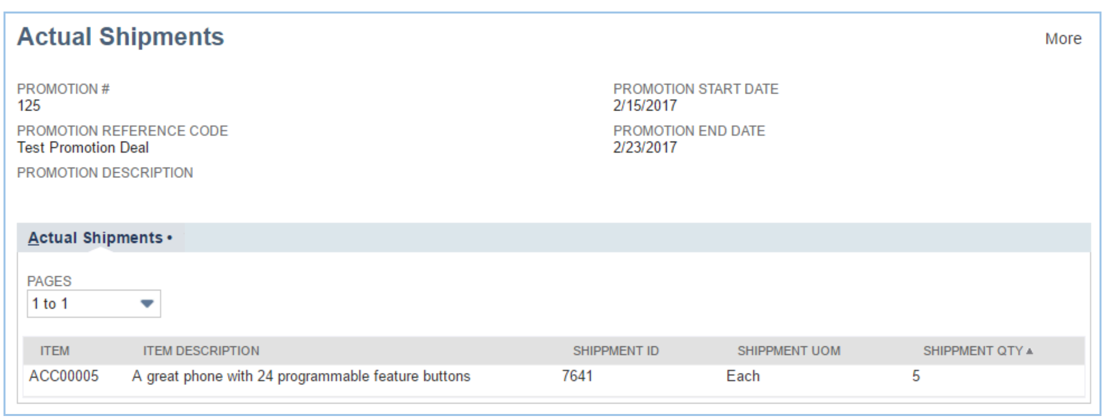
If your promotion is active, use these links in your promotion to see sales that qualify for your discounts and allowances:

Click on ***Actual Sales*** to see actual sales based on *Purchase Orders.*
Click on ***Actual Shipments*** to see shipments based on what has been *invoiced & shipped.*
Click on ***Sales Orders Overlapping this Promotion*** to see related sales orders.

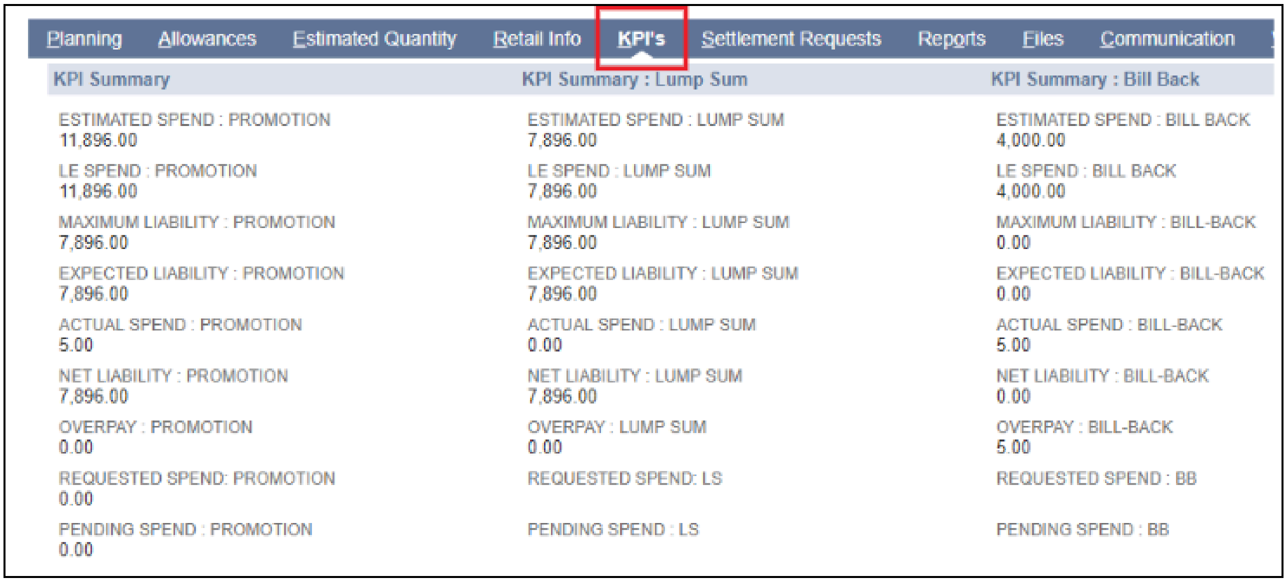



**Helpful Hint:** "Actual Revenue" in this report is net of discounts applied to the invoice.



## 4.2 Promotion KPIs




**Summary KPI columns will only appear if your promotion type contains that type of allowance:**

| KPI | Description | How to use this KPI |
|---|---|---|
| Estimated | What you **think will happen.** | Use this when approving or rejecting promotions. This forecasts the total cost and financial impact of your promotions based on your allowances and estimated quantities. |
| LE: Latest Estimate | What is **most likely to happen.** | Use LE as a real-time forecast into what the promotion will do as it moves through its lifecycle: Future, Active, Completed, and finally Closed. LE is calculated by *i*TPM. |
| Maximum Liability | This is the **maximum the deal should cost**. | If you anticipate redemption is less than 100%, *Expected Liability* will be less than Maximum. Maximum calculates your liability assuming 100% of all qualifying sales are eligible for your allowances.* |
| Expected Liability | **The total deal cost so far,** including paid and unpaid amounts. | **Use this to evaluate payments and promotional claims.** Any payment in excess of what you owe is an overpayment and doesn't reduce your promotional Net Liability.* |
| Actual | **What has** been paid or resolved to date. | This shows what has officially been recorded by NetSuite as of today. NetSuite keeps track of what you sell and ship. *i*TPM uses actual sales and settlements to track promotional spending by event. Actual spend does NOT include *requested* and *pending*. |
| Net Liability | **What you owe but haven't paid.** | Use this to anticipate future promotional payments and deductions. *i*TPM event-based accruals use this amount to anticipate future claims . |
| Overpay | **What you paid above what you owed** | Use this measure to identify promotions where the amount claimed or deducted was greater than what *i*TPM calculated you owed. |
| Requested | Settlements queued up for processing | These are settlements in the queue to be processed. They could be from a CSV Bulk Settlement, or from the RESOLVE DEDUCTIONS button on a promotion. |
| Pending | Settlements being **Processed** | These are requested settlements that have not yet been allocated down to items in the promotion. When processing is complete, the grid below will show this spending by item. |

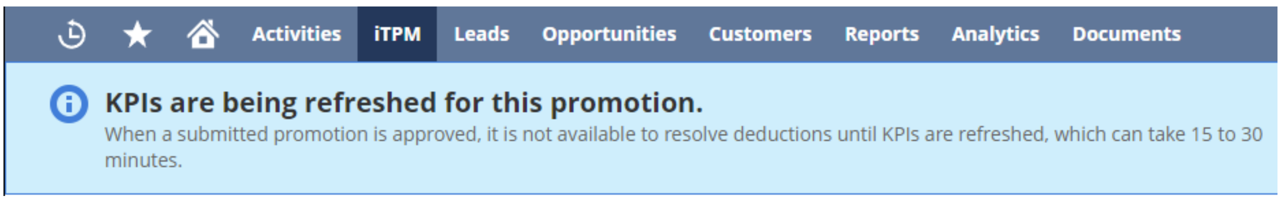
* For some promotion types, your *i*TPM administrator has configured liability to NOT change, and use ESTIMATED quantity as ACTUAL quantity in the calculation for Expected and Maximum Liability.

Total Estimated Promotion Spending = Lump Sum + Bill-Back + Off-Invoice + Net-Bill + Missed off-invoice

**KPIs** are also available for every item that's in the promotion. **(Scroll down to see this grid.)**

| ID ▲ | ITEM | ITEM DESCRIPTION | UOM | PROMOTED QUANTITY | ACTUAL QUANTITY | ESTIMATED SPEND | LE SPEND | MAXIMUM LIABILITY | EXPECTED LIABILITY | ACTUAL SPEND |
|---|---|---|---|---|---|---|---|---|---|---|
| 503 | ACC00004 | Merlin 4412D: The most powerful features avail in a 12 button display phone | Each | 100 | 0 | 245.80 | 245.80 | 243.59 | 145.80 | 243.59 |
| 504 | ACC00005 | A great phone with 24 programmable feature buttons | Each | 200 | 1 | 540.96 | 540.96 | 285.81 | 341.96 | 284.81 |
| 505 | ACC00007 | 50 Button Digial Console | Each | 400 | 5 | 913.24 | 913.24 | 476.60 | 518.24 | 471.60 |

**A banner tells you when KPIs are being updated.** When you edit or change the status of a promotion, or create a settlement, promotions are put into a queue that updates KPIs every 15 minutes. Active promotions linked to shipments are updated overnight to calculate the liability on today's new shipments. Some of the summary KPIs in the KPI subtab are updated in real-time, such as pending, actual spend and net liability for bill-backs.




**Look for the date and time your promotion's KPIs were last updated:**

| Last Updated | |
|---|---|
| KPIS LAST UPDATED<br>6/2/2021 6:06 pm | KPI SUMMARY LAST UPDATED<br>6/2/2021 6:34:30 pm |

If you feel the KPIs on your promotion have not automatically updated, or you want to force *i*TPM to update the KPIs, use the ***REFRESH KPIs*** button to put your promotion into the KPI queue.

Wait about 15 minutes and you will see a new *KPI Last Updated* date and time on your promotion. You can check the status of your KPI Refresh at *iTPM -> Promotions -> KPI Draft Processing Queue* for draft promotions, or the *iTPM -> Promotions -> KPI Processing Queue for everything else*.

**Helpful Hint:** Your *i*TPM administrator has configured some promotion types to update liability using actual shipments.

- If the promotion type you selected updates liability using actual shipments, you will see Maximum and Estimated Liability increase for bill-backs and off-invoice as you ship product to your customer.
- If the promotion type you selected does NOT update liability using actual shipments, then your Maximum and Estimated Liability for bill-backs and off-invoice will ALWAYS be equal to your Estimated Spend.

*i*TPM does all these calculations. You don't have to remember these business rules, and you don't have to update a spreadsheet with shipments, settlements, etc. to track your promotion.

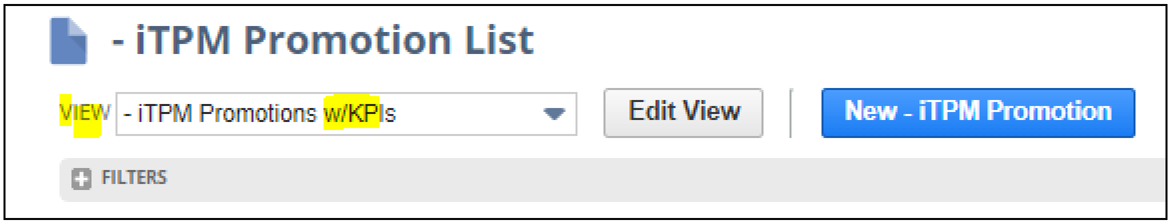
**Helpful Hint:** KPIs are allocated to the items on the promotion. For example, Lump Sum is entered as one amount. *i*TPM spreads the Lump Sum across all the items on the promotion. Settlements are also allocated to items on the promotion.

**Note: It can take up to 15 minutes or so before VOIDED settlements are reflected in the KPIs for active and completed promotions.**

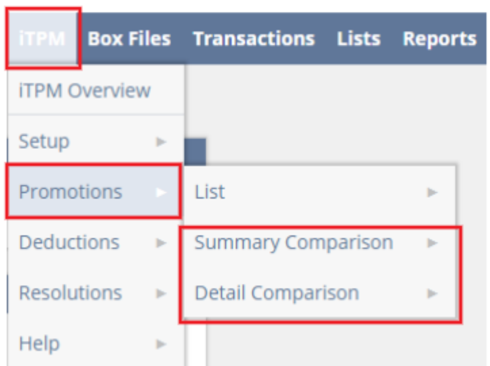
## 4.3 Promotion List with KPIs

You have two ways to compare promotions by KPIs.

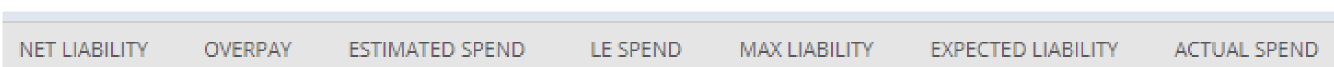
- ***iTPM -> Promotions -> List***, then select the LIST view with KPIs




- ***iTPM -> Promotions -> Summary Comparison or Detail Comparison***

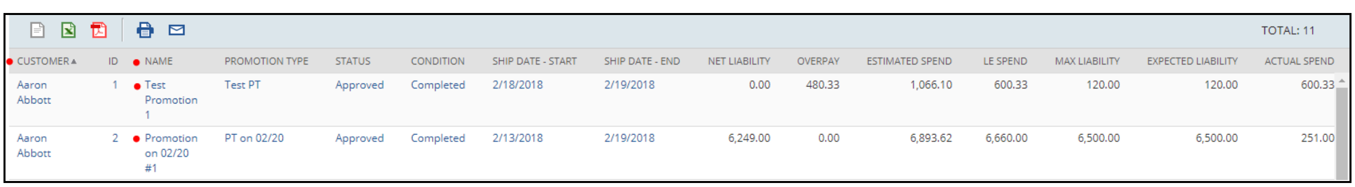



You will see the same KPIs measures as shown in the promotion subtab.




**Summary** Comparison: (Also available in NetSuite workbooks on your dashboard)

- Each row: one promotion for one customer.
- Use this to review r**esults by promotion**.
- To see additional KPI measures by method of payment and detail by item, click on the ID or promotion name.
- Export to Excel: Pivot table to summarize by customer across promotions



TOTAL: 11

| CUSTOMER | ID | NAME | PROMOTION TYPE | STATUS | CONDITION | SHIP DATE - START | SHIP DATE - END | NET LIABILITY | OVERPAY | ESTIMATED SPEND | LE SPEND | MAX LIABILITY | EXPECTED LIABILITY | ACTUAL SPEND |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Aaron Abbott | 1 | Test Promotion 1 | Test PT | Approved | Completed | 2/18/2018 | 2/19/2018 | 0.00 | 480.33 | 1,066.10 | 600.33 | 120.00 | 120.00 | 600.33 |
| Aaron Abbott | 2 | Promotion on 02/20 #1 | PT on 02/20 | Approved | Completed | 2/13/2018 | 2/19/2018 | 6,249.00 | 0.00 | 6,893.62 | 6,660.00 | 6,500.00 | 6,500.00 | 251.00 |

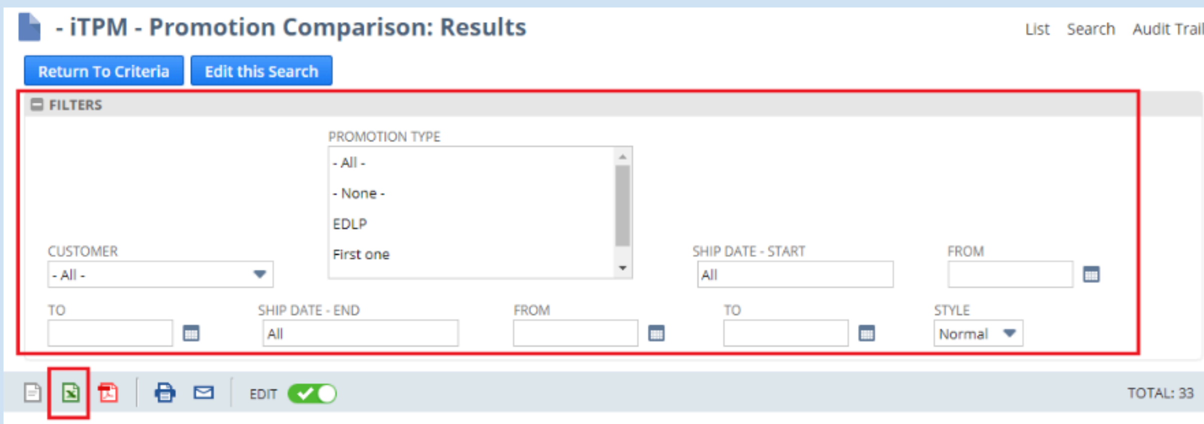
**Detail** Comparison:
- Each row: one promotion for one customer AND one item in the promotion.
- Use this to compare **results by item by promotion.**
- Export to Excel: Pivot table to summarize by customer and by item across promotions


EDIT TOTAL: 36

| EDIT \| VIEW | INTERNAL ID | CUSTOMER ▲ | ID | NAME | PROMOTION TYPE | STATUS | CONDITION | SHIP DATE - START | SHIP DATE - END | ● ITEM | ITEM DESCRIPTION | NET LIABILITY | OVERPAY | ESTIMATED SPEND | EST |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Edit \| View | 1 | Aaron Abbott | 1 | Test Promotion 1 | Test PT | Approved | Completed | 2/18/2018 | 2/19/2018 | ● ACC00002 | Digital Single Line Telephone ( 4400) for support calls | 0.00 | 34.80 | 207.68 | |
| Edit \| View | 1 | Aaron Abbott | 1 | Test Promotion 1 | Test PT | Approved | Completed | 2/18/2018 | 2/19/2018 | ● ACC00004 | Merlin 4412D: The most powerful features avail in a 12 button display phone | 0.00 | 445.53 | 858.42 | |

The Promotion subtab KPI measures are described in more detail in reference section 4.2:

**Helpful Hint:** Use NetSuite filters and customization to show you only what you want to see, or export to Excel for additional analysis.




**Note: Settlements that are in PROCESSING status are NOT included in the promotion comparison report** until the processing is complete and the promotion KPIs are updated**.**
The allocation process that spreads requested settlements to the items in the promotion runs every 15 minutes.

You can also create real-time pivot tables of your promotion KPIs for your dashboard.

For more details, see our on-line User Guide for NetSuite Workbooks:

***iTPM -> Help -> Analysis User Guides***, or go to www.i-TPM.com/analytics

The Promotion Comparison Summary List can be used to analyze promotion results by **Event.**

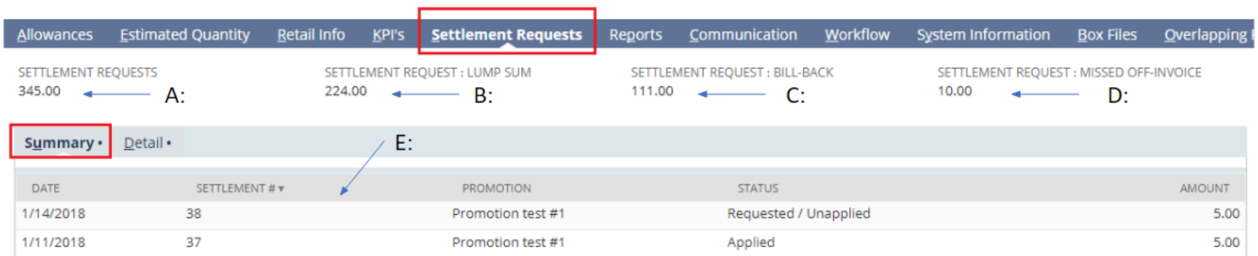
Analysis by promotional event is one of the three basic perspectives for post-promotion analysis: ***Weekly*** Trends, Comparing One ***Time Period*** versus Another, and **by *Event*** Analysis.

| Example TPM issues and questions | How to use KPIs by Promotion |
|---|---|
| What promotions are **projected to cost a lot more than you estimated?**<br><br>You may need to adjust your budget, adjust future promotions to compensate for the over-spend, or take other action. | Compare *Latest Estimate* vs *Estimated Spend*.<br><br>Look for promotions where the *Latest Estimated Spend* is much larger than what you estimated the spending would be. |
| What active promotions are **underperforming**?<br><br>If possible, can I take action while the promotion is still running? | Filter on condition=*active*, and compare *Actual Quantity* vs *Estimated Quantity*.<br><br>Look for promotions where *actual sales* are far below your *estimated quantity*. |
| **Can I free-up trade funds** by closing old promotions that should be closed? | Filter on status=*approved*, condition=*completed*, and sort on date. The oldest promotions may be good candidates to be closed. |
| Can *i*TPM help me prepare for an **Annual Account Review** with a major customer?<br><br>Can I use promotion data in my presentation to show what you've done with the customer this year? i.e., Compare this year to last year? | Filter on the customer, and export all promotions to Excel, or analyze in a NetSuite workbook in NetSuite.<br><br>Create pivot tables showing promotions in the current year, last year, and next year. |
| **Can I do a Year-end review** of promotional payments that will be carried forward into your next fiscal year? | Filter to show promotions in the current fiscal year, with status=*approved*. Use *Net Liability* to anticipate your promotional liability that will be paid in the next fiscal year.<br><br>Note: This assumes that all promotions are completed. If not, also look at *Latest Estimate* for promotions where condition = *active* or *future*. |

## 4.4 Settlements

The *Settlement Requests* subtab shows payments and deduction resolutions matched to the promotion:

**A**: **Total amount of all Settlement Requests** matched to this promotion.
**B**: Total amount of just the **Lump-Sum** settlements matched to this promotion
**C**: Total amount of just the **Bill-back** settlements matched to this promotion
**D**: Total amount of just the **Missed-Off-Invoice** settlements matched to this promotion
**E**: **List of settlements** matched to this promotion, where in the *Summary* sublist, each row represents one settlement

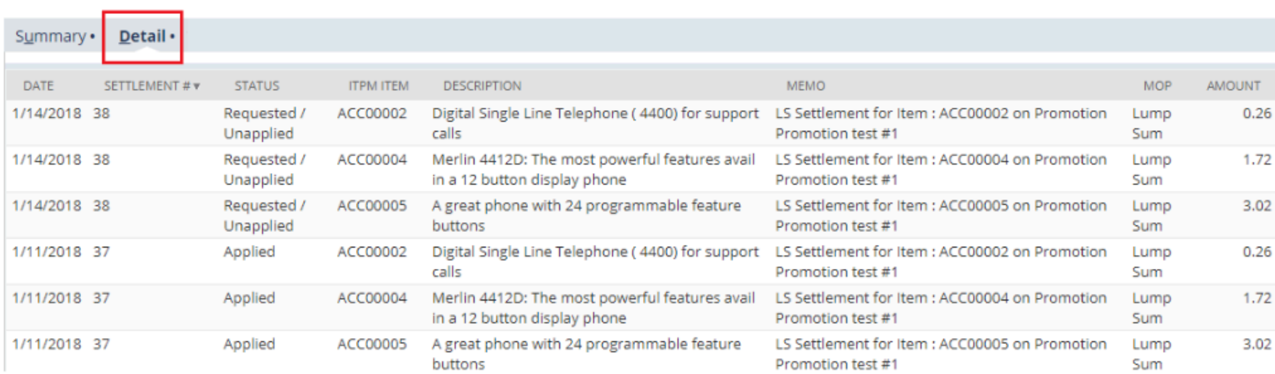



Both applied and unapplied settlements are included. *VOIDED* settlements are shown, but NOT included in the KPIs. (15 minute or so delay between the void and updated KPI)

The total amount of the settlement request is shown under the *Summary* sublist. Settlements can be proactive payments to the customer, or deductions taken by the customer and matched to the promotion.

**To view any settlement in more detail, click on the Detail sublist.**

In the *detail* sublist, you can view the settlement amount that has been allocated to each item in the promotion.



Summary • Detail •

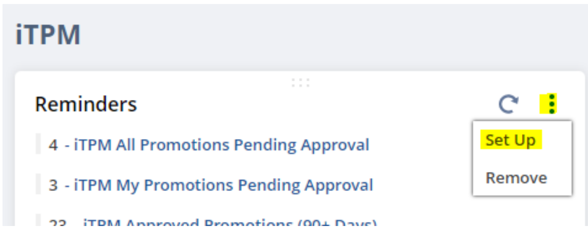
| DATE | SETTLEMENT # | STATUS | ITPM ITEM | DESCRIPTION | MEMO | MOP | AMOUNT |
|---|---|---|---|---|---|---|---|
| 1/14/2018 | 38 | Requested / Unapplied | ACC00002 | Digital Single Line Telephone ( 4400) for support calls | LS Settlement for Item : ACC00002 on Promotion Promotion test #1 | Lump Sum | 0.26 |
| 1/14/2018 | 38 | Requested / Unapplied | ACC00004 | Merlin 4412D: The most powerful features avail in a 12 button display phone | LS Settlement for Item : ACC00004 on Promotion Promotion test #1 | Lump Sum | 1.72 |
| 1/14/2018 | 38 | Requested / Unapplied | ACC00005 | A great phone with 24 programmable feature buttons | LS Settlement for Item : ACC00005 on Promotion Promotion test #1 | Lump Sum | 3.02 |
| 1/11/2018 | 37 | Applied | ACC00002 | Digital Single Line Telephone ( 4400) for support calls | LS Settlement for Item : ACC00002 on Promotion Promotion test #1 | Lump Sum | 0.26 |
| 1/11/2018 | 37 | Applied | ACC00004 | Merlin 4412D: The most powerful features avail in a 12 button display phone | LS Settlement for Item : ACC00004 on Promotion Promotion test #1 | Lump Sum | 1.72 |
| 1/11/2018 | 37 | Applied | ACC00005 | A great phone with 24 programmable feature buttons | LS Settlement for Item : ACC00005 on Promotion Promotion test #1 | Lump Sum | 3.02 |

**Helpful Hint:** If you process and manage deductions, refer to the ***i*TPM User Guide for Deductions and Settlements** for more details, available at www.i-TPM.com/deduction-management .

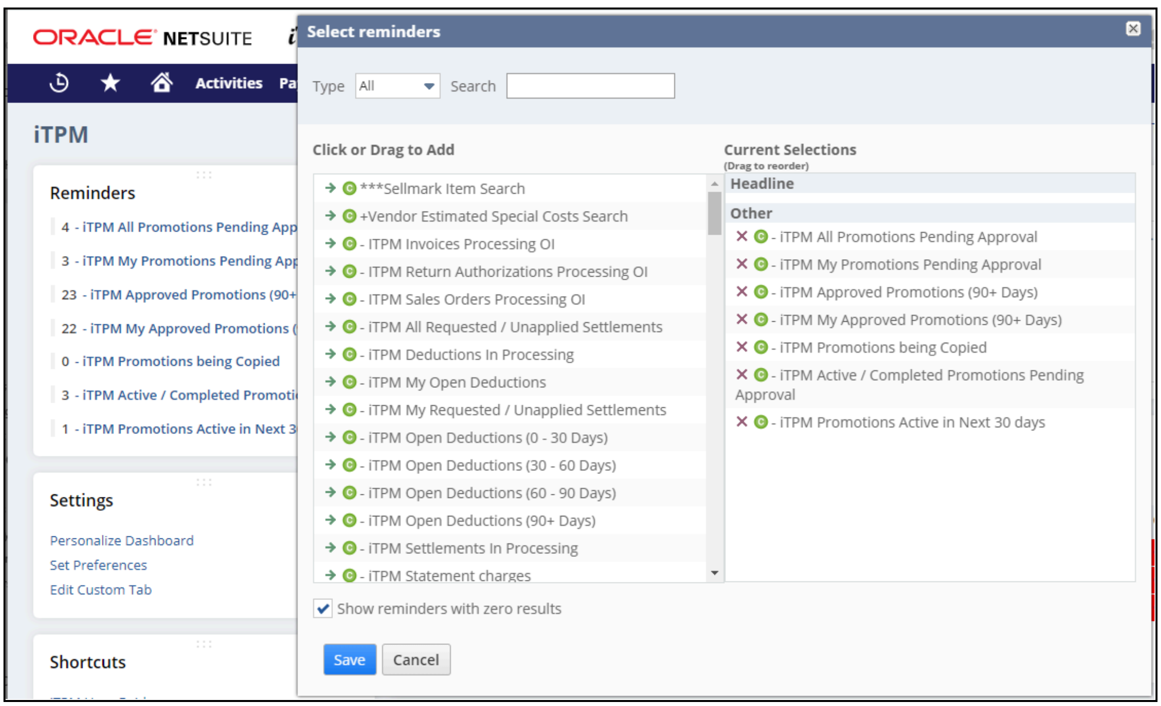
## 4.5 Dashboard Suggestions for Promotions

NetSuite has many standard ways to customize your dashboard. Your iTPM Administrator may make iTPM dashboard portlets available to you. Here are a few suggestions for your iTPM dashboard using the native NetSuite functionality and pre-built iTPM saved searches:

1. Find the REMINDERS portlet on your dashboard. Click on the three vertical dots (ellipsis), and then SET UP




2. Find the iTPM reminders that best fit your role and needs. Drag them from the Lift side to the right side, then click SAVE.




Create real-time pivot tables of your promotion KPIs for your dashboard.

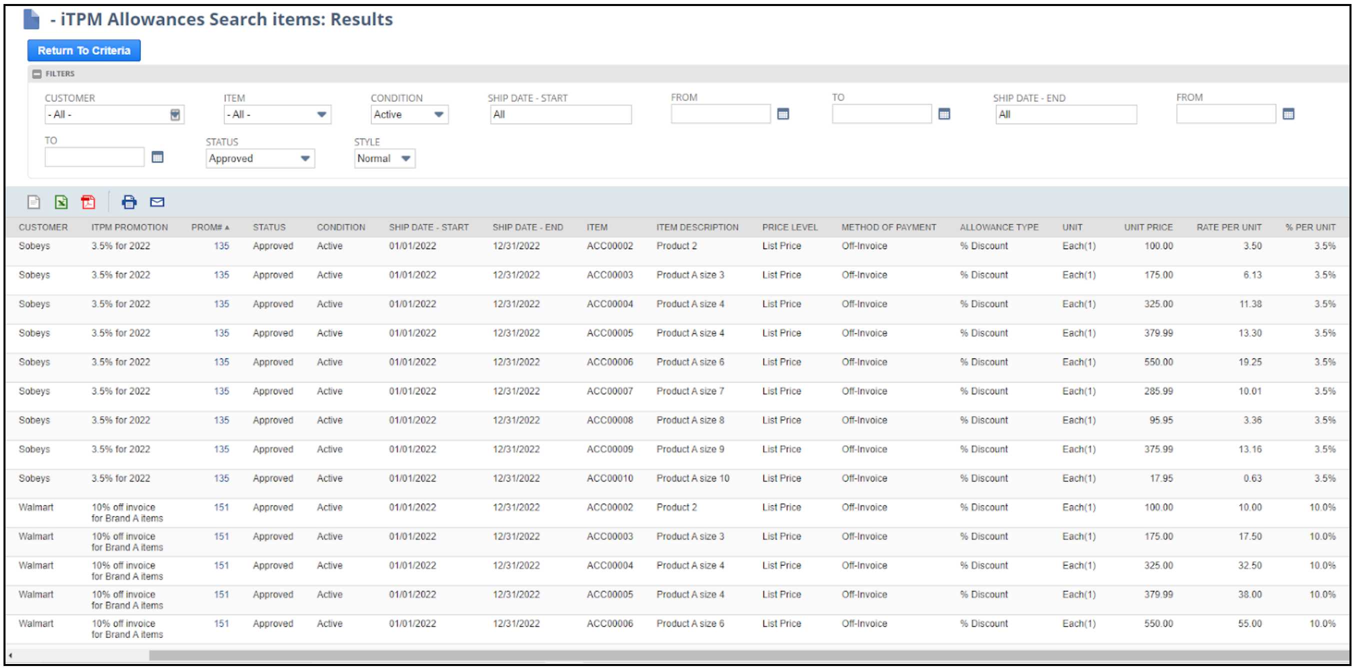
For more details, see our on-line User Guide for NetSuite Workbooks:

***iTPM -> Help -> Analysis User Guides***, or go to [www.i-TPM.com/analytics](www.i-TPM.com/analytics)

## 4.6 What item discounts are active right now?

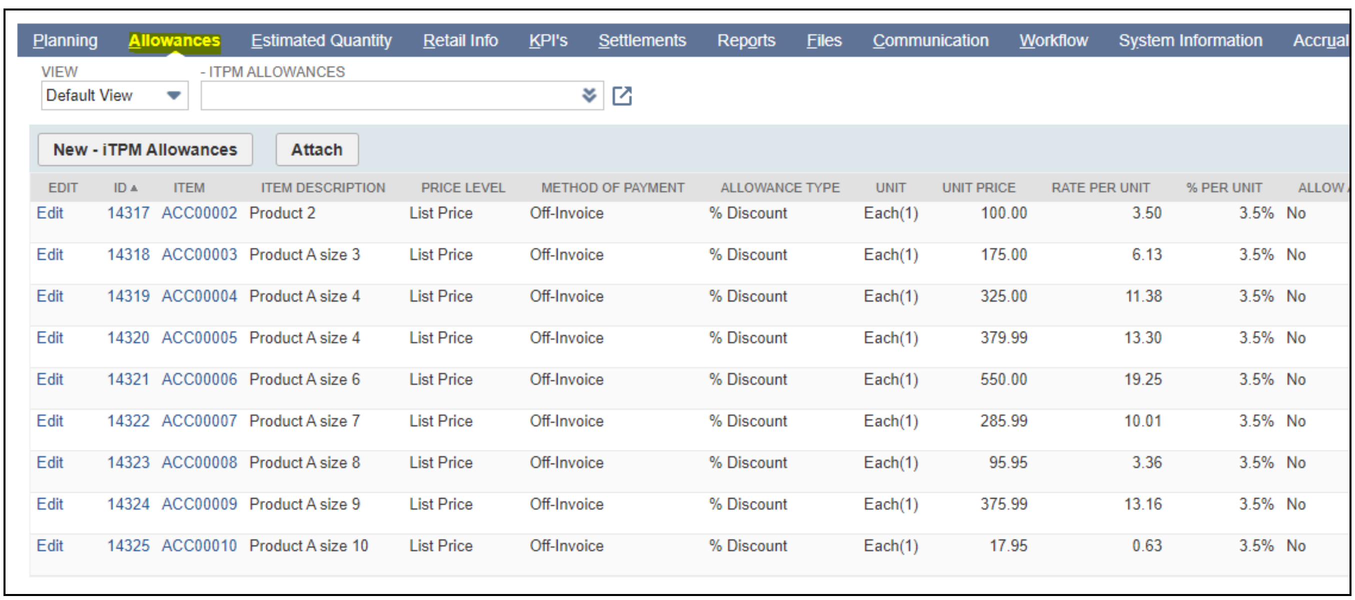
For a list of discounts by item, go to ***iTPM -> Promotions -> Allowances by Item***

You can filter the list to see allowances from *approved*, *active* promotions across all customers.




| CUSTOMER | ITPM PROMOTION | PROM# ▲ | STATUS | CONDITION | SHIP DATE - START | SHIP DATE - END | ITEM | ITEM DESCRIPTION | PRICE LEVEL | METHOD OF PAYMENT | ALLOWANCE TYPE | UNIT | UNIT PRICE | RATE PER UNIT | % PER UNIT |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Sobeys | 3.5% for 2022 | 135 | Approved | Active | 01/01/2022 | 12/31/2022 | ACC00002 | Product 2 | List Price | Off-Invoice | % Discount | Each(1) | 100.00 | 3.50 | 3.5% |
| Sobeys | 3.5% for 2022 | 135 | Approved | Active | 01/01/2022 | 12/31/2022 | ACC00003 | Product A size 3 | List Price | Off-Invoice | % Discount | Each(1) | 175.00 | 6.13 | 3.5% |
| Sobeys | 3.5% for 2022 | 135 | Approved | Active | 01/01/2022 | 12/31/2022 | ACC00004 | Product A size 4 | List Price | Off-Invoice | % Discount | Each(1) | 325.00 | 11.38 | 3.5% |
| Sobeys | 3.5% for 2022 | 135 | Approved | Active | 01/01/2022 | 12/31/2022 | ACC00005 | Product A size 4 | List Price | Off-Invoice | % Discount | Each(1) | 379.99 | 13.30 | 3.5% |
| Sobeys | 3.5% for 2022 | 135 | Approved | Active | 01/01/2022 | 12/31/2022 | ACC00006 | Product A size 6 | List Price | Off-Invoice | % Discount | Each(1) | 550.00 | 19.25 | 3.5% |
| Sobeys | 3.5% for 2022 | 135 | Approved | Active | 01/01/2022 | 12/31/2022 | ACC00007 | Product A size 7 | List Price | Off-Invoice | % Discount | Each(1) | 285.99 | 10.01 | 3.5% |
| Sobeys | 3.5% for 2022 | 135 | Approved | Active | 01/01/2022 | 12/31/2022 | ACC00008 | Product A size 8 | List Price | Off-Invoice | % Discount | Each(1) | 95.95 | 3.36 | 3.5% |
| Sobeys | 3.5% for 2022 | 135 | Approved | Active | 01/01/2022 | 12/31/2022 | ACC00009 | Product A size 9 | List Price | Off-Invoice | % Discount | Each(1) | 375.99 | 13.16 | 3.5% |
| Sobeys | 3.5% for 2022 | 135 | Approved | Active | 01/01/2022 | 12/31/2022 | ACC00010 | Product A size 10 | List Price | Off-Invoice | % Discount | Each(1) | 17.95 | 0.63 | 3.5% |
| Walmart | 10% off invoice for Brand A items | 151 | Approved | Active | 01/01/2022 | 12/31/2022 | ACC00002 | Product 2 | List Price | Off-Invoice | % Discount | Each(1) | 100.00 | 10.00 | 10.0% |
| Walmart | 10% off invoice for Brand A items | 151 | Approved | Active | 01/01/2022 | 12/31/2022 | ACC00003 | Product A size 3 | List Price | Off-Invoice | % Discount | Each(1) | 175.00 | 17.50 | 10.0% |
| Walmart | 10% off invoice for Brand A items | 151 | Approved | Active | 01/01/2022 | 12/31/2022 | ACC00004 | Product A size 4 | List Price | Off-Invoice | % Discount | Each(1) | 325.00 | 32.50 | 10.0% |
| Walmart | 10% off invoice for Brand A items | 151 | Approved | Active | 01/01/2022 | 12/31/2022 | ACC00005 | Product A size 4 | List Price | Off-Invoice | % Discount | Each(1) | 379.99 | 38.00 | 10.0% |
| Walmart | 10% off invoice for Brand A items | 151 | Approved | Active | 01/01/2022 | 12/31/2022 | ACC00006 | Product A size 6 | List Price | Off-Invoice | % Discount | Each(1) | 550.00 | 55.00 | 10.0% |

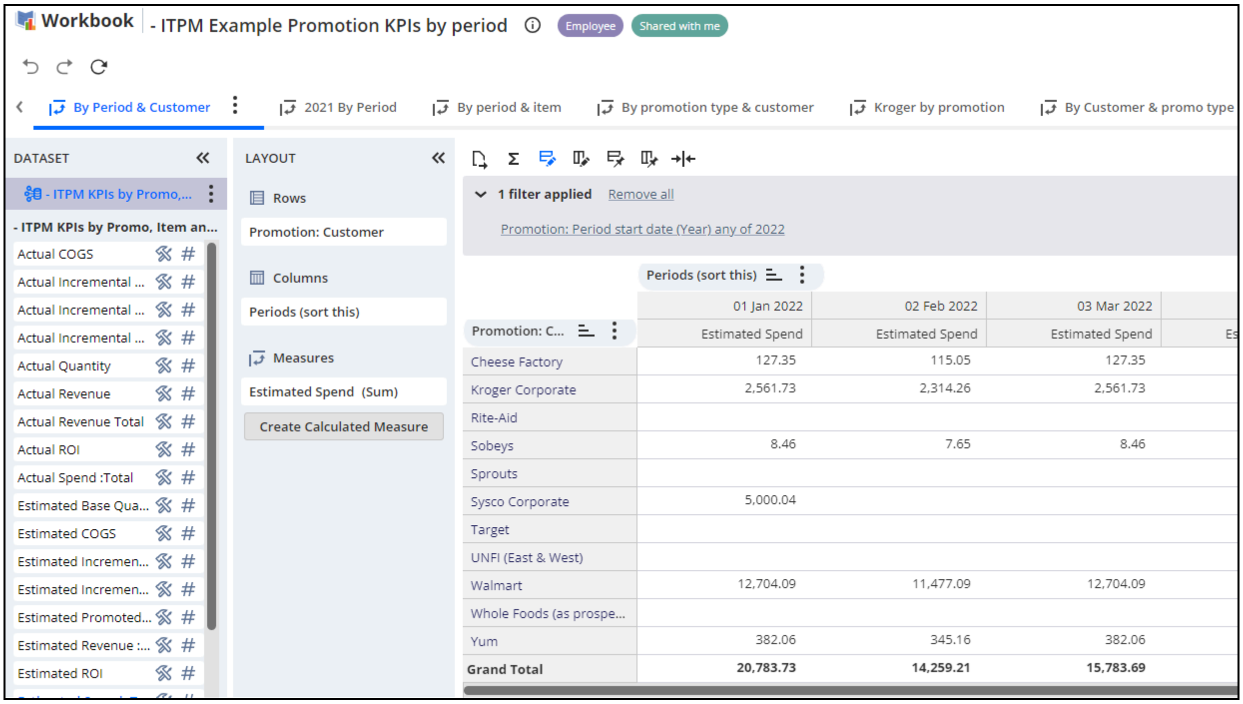
Example: Discounts in the saved-search above are also visible in the promotion under the *Allowances* subtab.



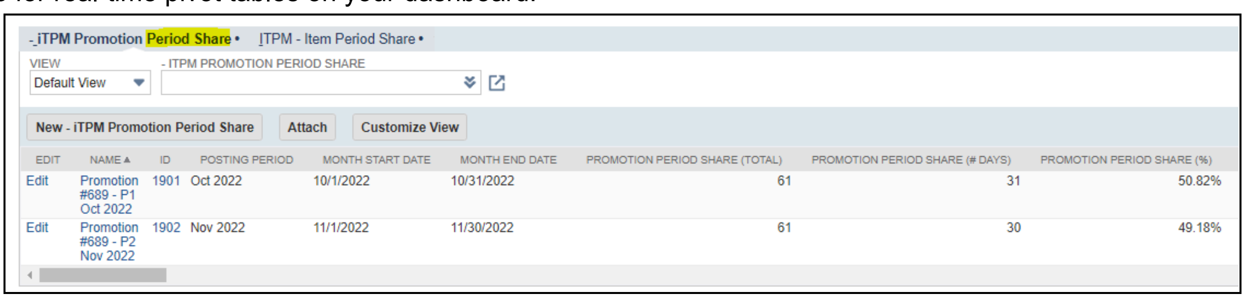

| EDIT | ID ▲ | ITEM | ITEM DESCRIPTION | PRICE LEVEL | METHOD OF PAYMENT | ALLOWANCE TYPE | UNIT | UNIT PRICE | RATE PER UNIT | % PER UNIT | ALLOW |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Edit | 14317 | ACC00002 | Product 2 | List Price | Off-Invoice | % Discount | Each(1) | 100.00 | 3.50 | 3.5% | No |
| Edit | 14318 | ACC00003 | Product A size 3 | List Price | Off-Invoice | % Discount | Each(1) | 175.00 | 6.13 | 3.5% | No |
| Edit | 14319 | ACC00004 | Product A size 4 | List Price | Off-Invoice | % Discount | Each(1) | 325.00 | 11.38 | 3.5% | No |
| Edit | 14320 | ACC00005 | Product A size 4 | List Price | Off-Invoice | % Discount | Each(1) | 379.99 | 13.30 | 3.5% | No |
| Edit | 14321 | ACC00006 | Product A size 6 | List Price | Off-Invoice | % Discount | Each(1) | 550.00 | 19.25 | 3.5% | No |
| Edit | 14322 | ACC00007 | Product A size 7 | List Price | Off-Invoice | % Discount | Each(1) | 285.99 | 10.01 | 3.5% | No |
| Edit | 14323 | ACC00008 | Product A size 8 | List Price | Off-Invoice | % Discount | Each(1) | 95.95 | 3.36 | 3.5% | No |
| Edit | 14324 | ACC00009 | Product A size 9 | List Price | Off-Invoice | % Discount | Each(1) | 375.99 | 13.16 | 3.5% | No |
| Edit | 14325 | ACC00010 | Product A size 10 | List Price | Off-Invoice | % Discount | Each(1) | 17.95 | 0.63 | 3.5% | No |

## 4.7 Promotion KPIs by Month (NetSuite periods)

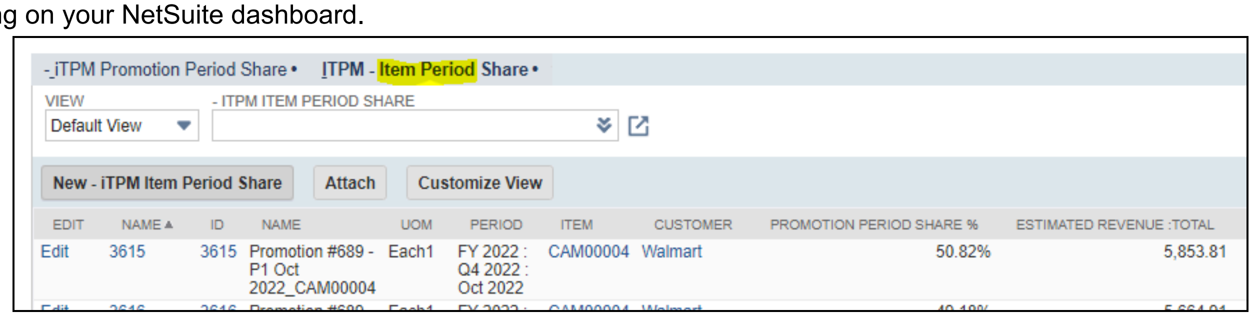
iTPM has the option to show you promotion KPIs by month. When this feature is turned on, you can use NetSuite workbooks to view your KPIs by month, customer, promotion type, and item. For more information on NetSuite workbooks, go to ***iTPM -> Help -> Analysis***)




To see if KPIs by Month are turned on for your account and promotion type, VIEW your promotions and go to the REPORTS subtab. The first subtab shows you promotion KPIs by month by promotion. This is the data that is available for real-time pivot tables on your dashboard:

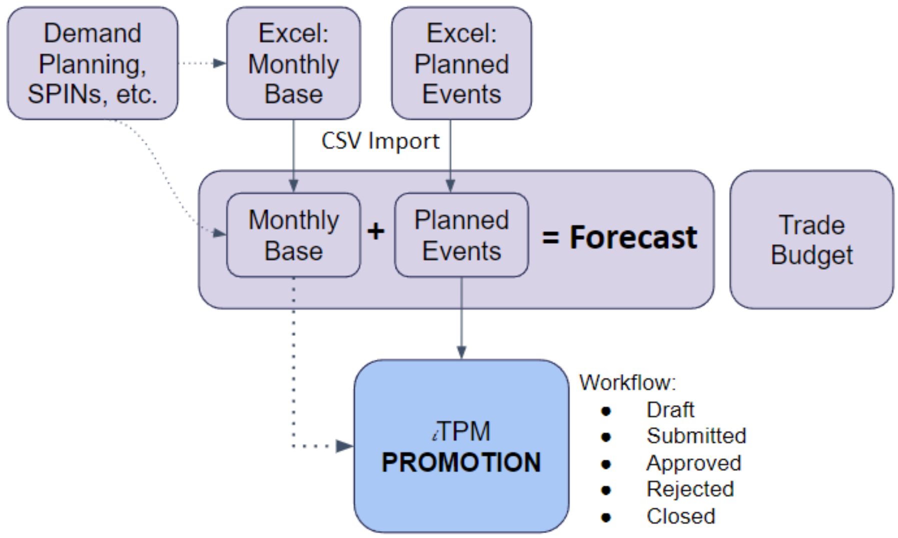



The second subtab shows you promotion KPIs by month by promotion and item, and is also available for real-time reporting on your NetSuite dashboard.



# 5.0 Annual Planning

You have the option to plan promotions as part of your annual planning process.




**Step 1: Forecast your Monthly Base Volume (CSV import from Excel planner option)**

- Plan your monthly base volume by customer, period and item or item group.
- Leverage third-party data like SPINS, IRI, AC Nielsen, and demand planning tools.
- Work inside NetSuite, or manage data in Excel and then use CSV import.

**Step 2: Create Planned Events (CSV import from Excel Planner option)**

- Plan your events with fewer restrictions and required fields.
  Note: These are not iTPM promotions until Step 4.
- Base volume defaults saves mouse clicks.
- Work inside NetSuite, or manage data in Excel and then use CSV import.
- Excel Planner template details are in the **Annual Planning User Guide.**

**Step 3: Forecast Roll-ups**

- Review your annual forecasted plan in revenue, units, and total trade spend
- Forecast Revenue or volume = Base revenue + Incremental Revenue from events
- Annual Plan can include both direct and indirect customers.

**Step 4: Create promotions from your planned Event**

- Use iTPM to validate your planned event data, and provide defaults where possible
- Identify the plans you want to converted into iTPM promotion
- Option to automatically run Process Plan on the newly created promotions

**Step 5: Mass Status Change promotions (Optional)**

- Use the iTPM admin tool to mass-change promotion status from *Draft* to *Pending Approval* or *Draft* to *Approved*.
- Admin tool to perform the mass status change is limited to NetSuite Admin and iTPM Support roles.

More details are in the Annual Planning User Guide at [www.i-TPM.com/annual-planning](www.i-TPM.com/annual-planning)

# 6.0 Reference

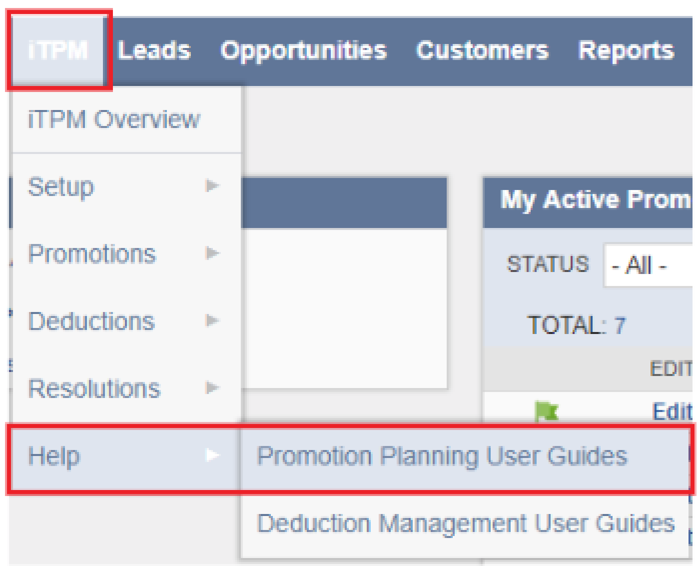
There are 2 ways for you to get **help**, report **issues**, ask **questions**, and share your enhancement **ideas**:

| How to get Help! | Description |
|---|---|
| **Online** | Use www.i-tpm.com/promotion-planning for User Guide PDFs and Training videos specific to *i*TPM trade promotion planning.<br>use www.i-TPM.com/annual-planning to learn how to create promotions from Event Plans, and how to plan your Monthly Base Forecast. |
| **Email** | Just email your question or issue to support@cgsquared.com. |

**Access *i*TPM Online Documentation: *iTPM -> Help***

If you have appropriate permissions to see the *i*TPM menu, you also have easy access to our online documentation.

Click ***iTPM -> Help -> Promotion Planning User Guides*** to open our web page with links to our User Guides and training videos.




You can also access our online documentation by pasting this link into your browser: www.i-tpm.com/training-resources

**Email your support question or issue to support@cgsquared.com.**

- Your email will create a support ticket so we can answer your question or fix your issue.
- You will get an email reply with an *i*TPM support ticket number in the subject line.
- *i*TPM support staff will follow-up with you by email, and by phone if necessary
- You will receive periodic email updates on the status of your support issue

# CG Squared, Inc. and this User Guide

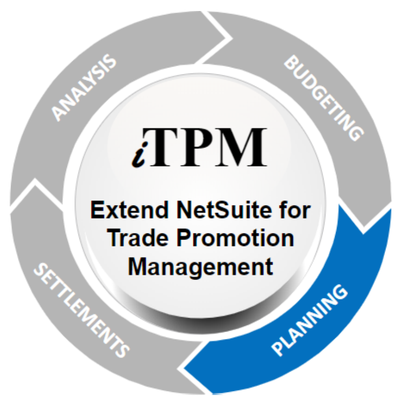
CG Squared designs, develops and supports the iTPM SuiteApp. CG Squared, or CG$^2$, is short for ***C**onsumer **G**oods **C**onsulting **G**roup*. Our passion and 100% focus is trade promotion for the CG industry. We have more than 30 years experience delivering closed-loop, trade promotion management solutions. CG$^2$ is committed to providing you world-class software and services:

- **Implementation services** to get iTPM configured, installed and ready for live production.
- **Training**, so your staff can efficiently use iTPM for trade promotion management.
- **Help Desk** support to answer your questions and help solve any issues.
- **Ongoing software enhancements**, with two new releases scheduled every year.
- Optional **TPM best-practices consulting**.

Learn more and follow our TPM blog at www.CGsquared.com.

CG$^2$ services are bound to the terms of service of the Professional Services Agreement between the parties.

# iTPM Promotion Planning




iTPM is a native SuiteApp built for NetSuite. iTPM is published and installed into your NetSuite account as a managed bundle.

This User Guide is written for iTPM users that create and manage trade promotions. Promotion planning is one of four integrated iTPM modules. There is a separate User Guide for Administrators.

This manual has been designed for two-sided printing to save paper!

We invite you to follow our iTPM blog at www.i-TPM.com.

Because we publish updates to iTPM at least twice each year, features and screenshots in this User Guide may not exactly match what you see in iTPM. This document is not intended to be a reference for NetSuite features, functionality and version releases.

The iTPM Subscription is bound to the terms of service of the iTPM License Agreement between the parties.