

Integrated Trade Promotion Management

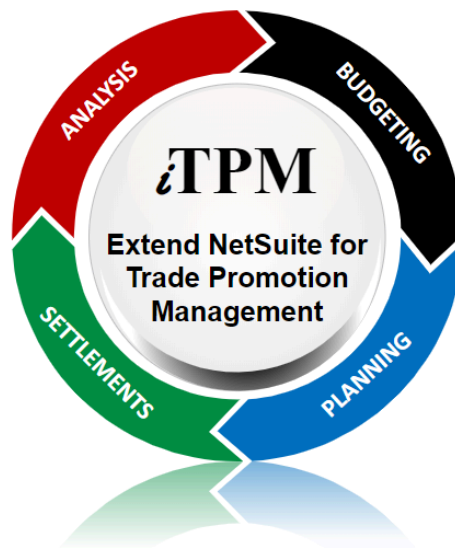


iTPM Admin Release & Install Notes

Version **24.2.2** Update

October 2024

Revised December 26, 2024



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Quick Reference: UPDATE iTPM to version 24.2.2

Use the Administrator User Guide and follow first-time tasks when installing iTPM. This check list is for UPDATING iTPM in your sandbox and/or production account.

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



Test in your sandbox before installing in production. We recommend you test this new version in your sandbox before installing in production to prevent issues, and to practice performing the administrative tasks in section [2.6 iTPM Administrator tasks \(After first-time install or Update\)](#). We test iTPM using the Chrome browser.



You may be required to update to 24.2.2 before iTPM 25.1.1 is published. Any NetSuite accounts not updated by this date will be notified when their account will be updated.

Milestone	UPDATE iTPM: Tasks for the iTPM Administrator	Status / Comments
1. iTPM 24.2.2 is available.	As time allows, read Chapter 1 and Section 2.6 in these technical release notes and the <i>What's New</i> in this new version of iTPM.	
2. Update your sandbox Skip to step 5 if you don't have a sandbox.	To update your sandbox , follow instructions in section 2.4 UPDATE iTPM in your Sandbox (or Release Preview account) to update your sandbox to iTPM 24.2.2. If you don't have a sandbox, update and test in your Release Preview account if available. If you don't have a sandbox or release preview account, skip to step 5.	
3. Perform admin tasks in your sandbox	Perform admin tasks as described in section 2.6 iTPM Administrator tasks (After first-time install or Update)	
4. Test!	Test iTPM. Suggested areas to include are in section 2.7 Suggested Sandbox Testing	
5. Authorize update to your production	Email CG Squared to update iTPM in production, described in section 2.5 UPDATE iTPM in production	
6. Perform admin tasks in production	Perform admin tasks as described in section 2.6 iTPM Administrator tasks (After first-time install or Update)	
7. Monitor	Monitor iTPM to confirm it's working as expected.	

1.0 Overview

1.1 Enhancements in iTPM **24.2.2**

The following changes were made to iTPM 24.2.1 and are included in iTPM version 24.2.2.

- iTPM 24.2.1 was tested with NetSuite 2024.2, and recertified as Build-for-NetSuite
- This list begins with Agile Development iteration #332 through #353 :
- **Defect** tickets start with “D”.
- **Enhancement** tickets start with an “S”
- **Notable enhancements are bolded and described in the What's new in iTPM? PowerPoint.**

The following stories were added to iTPM 24.2.1:

iTPM 24.2.1 Published July 23, 2024

Iteration 332

- D-01600: The calculated base in the plan did not convert to the correct UOM.
- S-04843: Sometimes iTPM incorrectly changes the item price when the sales order is repriced.
- **S-04933: Develop Header Discounts and Surcharges as an alternative way to apply discounts to sales orders. These discounts will add a NetSuite subtotal at the end of the sales order, and the iTPM discount item will apply to the subtotal.**

Iteration 333

- S-04856: Identify approach to add Header Discount and Header Surcharge MOPs into the locked "- iTPM Method of Payment" records so that their internal IDs are always #6 and #7. Note: ID=5 will be set to inactive and not used.
- S-04854: Some clients need the Period Accrual MR script to use 'foreign currency'. Design a script parameter for this option to be implemented in a future enhancement.
- S-04877: Minor change to the Promotion Status change workflow to support Mass Status change from APPROVED to DRAFT.
- D-01603: Sometimes the NBOI remove script gets stuck removing iTPM discounts on sales orders.
- S-04852: Put the promotion name into the discount item description for header discount and surcharges.
- S-04840: Apply Header discount and Surcharges to all overlapping sales orders, even if no specific items in the promotion overlap the sales order. ("All items sold to this customer get this discount" is checked in the promotion.)
- **S-04834: Add 'include product attribute' to the Period Accrual Setup form, and appropriate change to the corresponding script that creates period accruals.**
- S-04875: Make a change to the Promotion status workflow to support APPROVED to VOID or DRAFT using the Mass Status change iTPM admin tool..

Iteration 334

- **S-04839: Add 'Promotion Type' as a new column to the Promotion Report that's under the iTPM_Discounts subtab in the sales order.**
- S-04859: Prep for re-publishing iTPM Connector 2 to UNHIDE JE script in the managed bundle: Confirmed, iTPM Connector 2 (iTPMc2) does not have any hidden JE script code. (See also S-04888)
- S-04880: Prep for re-publishing iTPM Connector to UNHIDE JE script in the managed bundle: Confirmed, iTPM Connector does not have any hidden JE script code. (See also S-04888)
- S-04874: The MR script "- iTPM MR Overnight Allowances" should create allowance records even when the item has a NULL price for the promotion's price level, and a NULL base price. (See S-04872)

Iteration 335

- S-04881: Confirmed, iTPM - Preferences form and iTPM version 24.2.1 does not have any hidden JS script in the published iTPM bundle.
- S-04883: NetSuite Case 5906672: Confirm iTPM does not have JE code with "Ext." indies iTPM script files. (Confirmed, iTPM is compliant with NetSuite requirements.)
- S-04869: Apply header level discounts to all overlapping sales orders, even when no allowance items overlap the SO, and when many items overlap. See als S-04840.
- S-04887: Remove the item # from the text in the discount item description for header discounts and header surcharges.
- S-04893: Remove the UOM from the text in the discount item description for header MOPs.
- S-04906: Add the iTPM Applied to date to the "Settlements by Promotion" report.

Iteration 336

- S-04896: Identify issue with period accrual item filtering. As designed, it does not work for clients that have more than 4,000 items. It must be redesigned.
- D-01606: The "- MR Allocation Contribution(SC)" script is not correctly chain running the MR script "- iTPM MR KPI New Calculations".
- **S-04882: Include Header Discounts & Changes in the Promotion report under the iTPM_Discounts subtab in the sales order.**
- D-01609: On save, iTPM script should put sales order into NBOI queue if ANY overlapping promotion has MOP = header discount or header surcharge. (See also S-04909)

Iteration 337

- S-04909: On save, iTPM script should check "iTPM Discounts Applied" when only MOP = header discount or header surcharge are applied to SO.
- S-04918: Make "Only header level discounts are there" in-line text, and move it to the third column under the iTPM subtab in the sales order, and change the text.
- D-01616: Item in the plan doesn't match the item created in the planning record.
- S-04922: Make changes in the Period-Accrual scripts and forms to support custom segments.

- D-01614: P2P script is not using the correct year when calculating the base when there are monthly base records for multiple years.

Iteration 338

- S-04828: KPI refresh banners should ignore inactive queue records.
- S-04855: Two promotion type checkboxes should default to checked: 'Allow settlements while promotion is active', and 'Apply % discounts as percentages'.
- S-04923: Add the subtotal description into the sales order discount when applying header level discounts and surcharges.
- **S-04819: Add the 'Other Reference code 2' field to the 'Resolve Deductions' result set when resolving deductions.**
- D-01613: When just viewing a plan, the plan's processing status and processing notes are cleared.
- S-04916: The NBOI script should not add a subtotal to the sales order if there are no overlapping header discounts or surcharges.
- S-04941: Remove Chaining in KPI script to prevent script errors.

Iteration 339

- D-01619: The Header discount and header surcharge rate-per-unit quantity is always = 1.
- S-04942: Design to support NetSuite Kits in promotions, which have no unit-of-measure. Assume UOM = 1 for Kits.
- S-04967: Design the NBOI script to process Kits, now that we assume the UOM for Kits = 1.

Iteration 340

- D-01622: The 'close promotion' event-accrual event type is not correct when closing a promotion.
- D-01620: The event accrual trigger "Promotion Edited-BB" does not have department populated.
- D-01621: "Promotion Closed" event accrual does not have department populated. (See also S-04971)

Iteration 340

- S-04973: MR Scripts: Assume a UOM of 1 if UOM is missing in the item (Kits) for Process Plan, P2p, PP4AP, overnight scripts and estimated volume script. [For applying OI to sales orders.]
- S-04975: Suitelets: Assume a UOM of 1 if UOM is missing in the item (Kits) for Process Plan, P2p, PP4AP, overnight scripts and estimated volume script. [For applying OI to sales orders.]
- S-04974: User Events: Assume a UOM of 1 if UOM is missing in the item (Kits) for Process Plan, P2p, PP4AP, overnight scripts and estimated volume script. [For applying OI to sales orders.]
- S-04990: Blank screen on promotion using the Modify button. (Related to S04975)
- S-04755: The "Pending Changes" reminder doesn't include promotions pending change if only the lump sum was changed.

- S-04798: Changes to the new reminder, "Promotion changes being processed."

Iteration 341

- S-04997: Overnight allowances script does not add Kits to promotions. (No UOM in Kits.)
- S-05007: When "All items sold to a customer get this discount" is checked, apply to all items in the sales order, even if the item is not in the promotion.
- S-05015: When "All items sold to a customer get this discount" is checked, the item allowance is not added to the promotion if discounts were previously applied.
- S-05013: Change the text in a banner on the sales order to make the banner message clear to the user.
- **S-04979: Create a new custom broker NetSuite center, and a new broker role using this new center.**
- S-05021: Create a new custom field in the customer record "iTPM Partner" to replace the NetSuite "Partner" field, which isn't available in every iTPM client's NetSuite instance.

Publish iTPM 24.2.2 S-04865, S-05030

Iteration 342

- S-05023: When using the iTPM Broker role to create a new promotion, the GL account does not default.
- D-01627: Sometimes sales orders with overlapping promotions with "all items sold to this customer get this discount" checked have missed OI because the item isn't added to the promotion before discounts are applied to the sales order.
- S-05000: Move the new custom field in the customer record "iTPM Partner" to under the iTPM subtab.

Iteration 343

- D-01631: Under some circumstances, discounts are not correctly re-applied to sales orders.
- S-05048: Refactor and simplify the NBOI User Event logic script to make it more efficient, faster, and able to work within NetSuite governance requirements.

Iteration 344

- S-05058: Refactor the NBOI User Event Script to simplify the logic and reduce processing requirements for NetSuite governance.
- S-05054: The 'Overnight Allowances' MR script must also populate the Planning Record ID field.
- S-05068: The New Event Plan link in the "iTPM Promotion Planning" form should be inline text.
- S-05018: Add a live link in the Promotion Planning record to the Plan called "Event Plan". [This will reduce the number of datasets needed to relate all related iTPM records in a KPI NetSuite workbook.
- D-01634: Quick Edit in 24.2.2 creates bad dates if the user's date format is not the same as the NetSuite global date format for the NetSuite instance.
- S-05065: The "new items overnight" MR script should include item groups changed today, not just yesterday.

Iteration 345

- S-05060: "New items overnight" MR script must also populate the Planning Record IDs and Planning record item name into the iTPM allowances & related records to support better reporting in NetSuite workbooks.
- S-05002: Change the promotion buttons (user events, Suitelets, etc.) to use the new 'iTPM Partner' field instead of the native partner field.
- S-04951: Prep for new feature in 25.1.1: Add a new checkbox in the Event-Accrual configuration form: "Allocate Accruals Daily"
- S-05088: Refactor & simplify how iTPM filters voided settlements and adjustments: *iTPM -> Resolutions -> All Settlements*
- S-05091: Refactor & simplify how iTPM filters voided settlements and adjustments: *iTPM -> Resolutions -> Regular Settlements*
- S-05088: Refactor & simplify how iTPM filters voided settlements and adjustments: *iTPM -> Resolutions -> All Settlements*
- S-05092: Refactor & simplify how iTPM filters voided settlements and adjustments: *iTPM -> Resolutions -> Voiding Settlements*
- S-05093: Refactor & simplify how iTPM filters voided settlements and adjustments: *iTPM -> Resolutions -> Settlement Adjustments*

Iteration 346

Publish iTPM 24.2.2 S-05099, S-05055

- D-01572: Process Plan for Approved Promotions must still work when the item base price is null. (Also changed is the Overnight Allowance script)
- S-05080: When creating a new promotion, the broker must only see their customers in the list. (See also S-05001)
- S-05094: Refactor: Simplify how iTPM filters voided settlements and adjustments in saved searches used in the promotion form.
- S-05106: Refactor: The *iTPM -> Resolutions -> All Settlements* saved search needs new logic for 'green' shading'.
- S-05113: Eliminate the "script already running" error message for "- iTPM MR KPI New Calculations 1 and 2" now that they are both scheduled.
- **S-04210: New Summary KPI: Stored Original Approved Estimated spend**
- S-05105: Broker partner role: Missing lump-sum account means broker's can't enter lump sum into production.

Iteration 347

- S-05116: Refactor: Change how we chain-run 14 MR scripts to use the new NS feature to prevent script "already running" error.

- D-01638: iTPM -> Resolutions -> All Settlements has the wrong color highlight for regular settlements in some iTPM standard roles.
- D-01625: Plan to Promotion defect: The "All items get this discount" does not get checked or unchecked in the promotion when the promotion is updated by the script.
- D-01611: The warning banner on the monthly base form says there are duplicates then there are no duplicates. (It must include the year when looking for duplicates.)

Republish 24.2.2 (S-05106, and S-05130)

- D-01636: Actions -> Copy does not clear all the stored KPI measure in the promotion header.
- S-04797: Calendar reports: If the role is Broker Partner, the customer list needs to be filtered, and the "all customers" checkbox must be filtered.
- S-05122: The Dashboard reminder portal is not locked for the Broker Partner role.
- S-05155: Add viewing restriction of calendar lists to only iTPM Partner = mine to the broker role. (Same change as in S-05125)
- S-05124: In the broker partner role, don't require the user to select the GL when creating a new promotion.
- D-01618: The Plan to Promotion script must apply the UOM conversion to item price and item revenue. (See also S-03861)
- S-05162: In the Event Plan form, change the item price level file name to prevent confusion.
- D-01640: In the Plan to Promotion MR script, the UOM conversion for calculated base is not correct. (See also S-03861.)

Iteration 349

- S-05123: For the Broker Partner role, when creating a new promotion, hide the NetSuite price level menu and default it using the value from the customer record or iTPM permissions. (See also S-05145)
- S-05195: Broker Customer partner: The customer list in the COPY PROMOTION button form shows all customers. It should only show customers assigned to the broker user.

Iteration 350

- S-05226: Make changes to the Broker role (custom center) to align with "iTPM Promotion Planning" role.
- S-05228: When a broker creates or edits a calendar, they should only see their customers: iTPM -> Promotions -> Calendar Summary.
- Remove "Edit and view ONLY" in Broker partner role
- S-05229: The Broker role should default the customer selection menu to 'no selection'.
- S-05228: When a broker creates or edits a calendar, they should only see their customers: iTPM -> Promotions -> Calendar Detail.
- S-05227: Missing 'view item' permission in the Broker role that caused a blank screen when clicking on the MODIFY button on approved promotions.

Republish iTPM 24.2.2 to include the locked Broker Partner Dashboard.

Iteration 351

- S-05201: Simplify the help selections for the Broker center tab role.

Iteration 352

- S-05271: Add journal entry as an acceptable transaction type in the deduction transaction field.

Iteration 353

- S-05281: REmove unnecessary role permissions from "- iTPM Customer Support SO" role.
- D-01648: The Plan to Promotion script does not always work for NetSuite Non-One World accounts.
- D-01647: Copy Promotion doesn't always work for NetSuite Non-One World accounts.

Republish iTPM 24.2.2 to include the D-01647 and D-01648

- Development continues...

1.2 Upcoming changes



You may be required to update to 24.2.x before iTPM version 25.1.x is published. Any accounts not updated by this date may be notified of when their account will be updated.

Release Schedule:

The following is the anticipated schedule of future iTPM versions. * Release dates subject to change.

iTPM Anticipated Releases	Anticipated Date Generally Available*
24.2.x	Minor updates as needed. iTPM 24.2.x will be minor releases to fix critical bugs, and the addition of critical features requested by clients.
25.1.x	Winter 2025 Major release with significant enhancements After iTPM 25.1.x is published, no bug fixes will be published to previous versions.

1.3 Known issues:

As of the release date, the following are known issues in iTPM releases**:

- **DO NOT change the concurrency of any iTPM scheduled scripts** without first consulting CG Squared. Script concurrency should be 1 for all iTPM scripts, except for the NBOI script that applies off-invoice to sales orders. Concurrency of 2 or more may result in the creation of incorrect data.
- S-01981 This is only a one-time issue if you have brokers that use the Advanced Partner Center to access iTPM. If you have partner management **not enabled** before you update or install iTPM, the criteria in the saved search, “- iTPM Partner Promotion List” will not have the correct search criteria. After you enable partner management, edit this search to enter the correct criteria shown below, **or simply update iTPM again**.

Saved - iTPM Promotion Search
- iTPM Partner Promotion List

Save | Reset | Cancel | Preview | New Template | Change ID | Actions

SEARCH TITLE *
- iTPM Partner Promotion List

ID
customsearch_ls_itpm_partnerpromotions

OWNER *
Ring, Alex

PUBLIC
 AVAILABLE AS LIST VIEW

AVAILABLE AS DASHBOARD VIEW
 AVAILABLE AS SUBLIST VIEW
 AVAILABLE FOR REMINDERS
 SHOW IN MENU

Criteria | Results | Highlighting | Available Filters | Audience | Rules | Email | Audit Trail | Execution Log

Use this tab to specify criteria that narrow down your search.

USE EXPRESSIONS

FILTER *	DESCRIPTION *	FORM
Customer : Broker/Partner	Is any of me, my team	

✓ Add | ✗ Cancel | + Insert | 🗑 Remove

1.4 iTPM Bundle Details:

For details on how to update your existing iTPM bundle, or install iTPM for the first time, go to [2.0 Installing the Bundle](#).

The following describes iTPM Release **24.2.2**.

iTPM Bundle Details	Release 24.2.2
Design, development, testing and publishing	March 2024 - July 2024
Bundle release date	Latest release is July 2024
Publisher ID	44277 CG Squared, Inc.
Bundle ID	Bundle #312604
NetSuite Built-for-NetSuite review?	iTPM 24.2.1 was tested with Netsuite 2024.2 and received Built-for-Netsuite certification.
Admin tasks required AFTER installation?	See 2.3 First-time Administrator Set-up Tasks (Skip if Updating) the first time setup tasks after you install iTPM. See 2.6 Administrator tasks (Updating iTPM) for the tasks when you update iTPM in a sandbox, release preview account, and/or in production.



IMPORTANT: DO NOT UNINSTALL iTPM from your live production account.

Doing so after go-live will result in the loss of iTPM data, including all promotional data and custom transaction records that resolve your short-pays.



IMPORTANT: Install iTPM in your SANDBOX account for testing BEFORE installing in your live production account. While iTPM is easy to install, and requires a minimum amount of effort to configure, **trade promotion has a material impact on your company's financial statements.** We recommend sandbox testing prior to go-live in production.



Helpful Hint: This is an incremental update to the previous version. For prerequisites, and additional iTPM technical details, **refer to release Notes for previous releases you didn't install**, available at www.i-TPM.com/admin-training-resources

Perform admin tasks as outlined in [2.3 First-time Administrator Set-up Tasks \(Skip if Updating\)](#) and in [2.6 iTPM Administrator tasks \(After Updating iTPM\)](#)

2.0 Installing or Updating the iTPM Bundle

2.1 Prerequisites to first-time installation

You can skip this section if you have already installed iTPM and you are just updating iTPM. Before you install the iTPM SuiteApp, these features must be enabled:

Go to **Setup > Company > Enable Features**.

Company subtab

- Multiple Units of Measure

Accounting subtab

- Accounting
- A/R
- A/P
- Accounting Periods

SuiteCloud subtab

- Custom Records
- Advanced PDF / HTML Templates
- Client SuiteScript
- Server SuiteScript
- SuiteFlow
- Custom Transactions

iTPM will install with the following configurations, but may not work properly after installation:



Helpful Hint: We recommend "**Allow Non-GL changes is set by Default**" is checked. Setup -> Accounting -> Accounting Preferences, General subtab, General Ledger section.



If journal entries must be approved or have workflow, check this accounting preference:

Setup -> Accounting -> Accounting Preferences

Under the **General** subtab, if "Require Approvals on Journal Entries" is checked, you MUST also check "Allow user events on bulk journal approval" just below it.



Company Date Format Preference:

Go to **Setup > Company > General Preferences**

Date Format: M/D/YYYY, D/M/YYYY, DD/MM/YYYY or MM/DD/YYYY

If your date format is not one of these, email support@cgsquared.com



Note: if you have accounting preference "Allow Transaction date outside of posting period" set to "Disallow", you'll need to set the Split-deduction parameter configuration to "Always use current date"



Note: If you use custom segments, email support@cgsquared to discuss customizing some iTPM forms and/or creating some scripts and configurations.



Updates to iTPM in Production after the first install:

Only Administrators can do the first-time install of iTPM. The user installing iTPM is the 'owner' of iTPM. After the first-time install, only CG Squared can push iTPM updates to production.

2.2 First-time Sandbox or Production Install (Skip if Updating)

Bundle installation should generally follow the standard installation steps provided in the NetSuite Help Center topic *Installing Bundles into Your NetSuite Account*.

1. Confirm your account is not scheduled for [maintenance](#) when you want to install iTPM.
2. Confirm prerequisites in [section 2.1](#).
3. Go to **Customization > SuiteBundler > Search & Install Bundles** to install the iTPM SuiteApp.



IMPORTANT: Do NOT use the Install process to UPDATE iTPM in your SANDBOX if iTPM is already installed in your sandbox. UPDATE, don't install. Installing could install two copies of iTPM in your sandbox, and require a sandbox refresh to fix.

4. Use the following information to **search for the iTPM SuiteApp**:
 - **Bundle Name:** *iTPM : Trade Promotion Management* **Bundle ID:** 312604

Search & Install Bundles

[Search](#)

Basic | [Advanced](#)

LEAVE THE KEYWORDS BOX BLANK AND CLICK SEARCH TO VIEW THE MOST POPULAR SUITEAPPS

KEYWORDS

[Installation Terms of Service](#)

NAME	BUNDLE ID	VERSION	MANAGED	COMPANY NAME	PUBLISHER ID	CREATED ON	AVAILABILITY
iTPM : Trade Promotion Management	312604	24.1.2	Yes	CG Squared, Inc. - 0 - TSTDRV1500358		26-DEC-19	Shared

5. Click on the **iTPM : Trade Promotion Management** link
6. Click the **INSTALL** button.
7. Click the **INSTALL BUNDLE** button and follow directions. (Click **OK** to install the bundle).
8. After iTPM is successfully installed, be sure to perform Administrator tasks:
 - a. See section [2.3 First-time Administrator Set-up Tasks \(Skip if Updating\)](#)
 - b. See section [2.6 Administrator tasks \(First-time install or Update\)](#)



IMPORTANT: Install iTPM in your SANDBOX and/or Release Preview account for testing BEFORE installing in your live production account. While iTPM is easy to install, and requires a minimum amount of effort to configure, **trade promotion has a material impact on your company's financial statements.** We recommend sandbox testing prior to go-live in production.



Note: If the Install button is NOT available: "You have not been granted access" message.

- The iTPM SuiteApp may not have been shared with your account. To get access to iTPM, contact the iTPM Help Desk at support@cgsquared.com.

2.3 First-time Administrator Set-up Tasks (Skip if Updating)



Important: You, as iTPM administrator, are responsible for setting up preferences, NetSuite settings, and performing other tasks that are required by this updated version of iTPM. Be sure to read ALL of the tasks in this chapter before you begin testing iTPM in your sandbox.

2.3 A. First time install tasks: Non-One World Accounts

Skip to the next task if you are using NetSuite One-World.

- How do you know if you have NetSuite Non-One-World? If you don't see the subsidiary in the iTPM preferences list, then you have Non-One-World. *iTPM -> Setup -> Preferences*.
- The subsidiary in NetSuite Non-One World accounts may not be populated on the first install of NetSuite.
- If you are unable to populate the subsidiary using *iTPM -> Setup -> Preferences*, then enter "iTPM Preferences" in the NetSuite global search, and use the alternative page to populate the subsidiary field.
- You will do this when performing the tasks in section 4.3 in the Admin User Guide.

2.3 B: First time install tasks: Decide which scripts should be scheduled:

You will schedule or unschedule scripts based on which iTPM features will be used:

1. These are the typical [iTPM Scheduled scripts](#):
2. Scheduled scripts for [Deduction Management ONLY](#):
3. Scheduled scripts for [Promotional Settlements](#):
4. Scheduled scripts for [Promotion Planning](#):
5. Scheduled scripts for [Promotion KPIs by Netsuite Period](#):
6. Scheduled scripts for [Applying Off-invoice to Sales orders](#)
7. Scheduled scripts for [Creating promotions using an Excel Planning Template](#):
8. Scheduled scripts for [Creating Accruals](#)



Note: See section 6.9 in the Admin Role User Guide for more details on iTPM scheduled scripts. In NetSuite, go to *iTPM -> Help -> Admin User Guide*

2.3 B.1 These are the typical iTPM SCHEDULED scripts: (Changed for 24.2.2)

If you only use the deduction module, only schedule the 7 yellow-highlight scripts below:

ID	SCRIPT ▲
customdeploy_itpm_promodeal_cpy	- iTPM - Copy Promotion
customdeploy_itpm_ddn_splitsvtaskimport	- iTPM - Deduction Split CSV Import Task
customdeploy_itpm_mr_allconbrbtnfordraft	- iTPM - MR All ContributionForDraft(SC)
customdeploy_itpm_mr_allocationconbrbtn	- iTPM - MR Allocation Contribution(SC)
customdeploy_itpm_mr_apply_detachec_inv	- iTPM - MR Apply Detached Invoice
customdeploy_itpm_mr_ddn_splitprocess	- iTPM - MR Deduction Split Process
customdeploy_itpm_mr_ddn_writeoff	- iTPM - MR Deduction Write-Off(Sc)
customdeploy_itpm_mr_delete_period_share	- iTPM - MR Delete Period Share Records
customdeploy_itpm_mr_delete_processplan	- iTPM - MR Inactive Related Records(Sc)
customdeploy_itpm_mr_inactive_relatedrec	- iTPM - MR Inactive Related Records(Sc)
customdeploy_itpm_mr_kpi_newcalschedule1	- iTPM - MR KPI New Calculations
customdeploy_itpm_mr_kpi_sum_field_calc3	- iTPM - MR KPI Summary Field Calcs
customdeploy_itpm_mr_nboi_rem_discounts	- iTPM - MR NBOI Processing
customdeploy_itpm_mr_nongl_mass_update	- iTPM - MR Non GL Mass Update
customdeploy_itpm_mr_promo_period_share	- iTPM - MR Promotion Period Share
customdeploy_itpm_mr_schedule_kpi_queue	- iTPM - MR Schedule KPI Queue
customdeploy_itpm_mr_settlementlines	- iTPM - MR Settlement Lines
customdeploy_itpm_mr_transaction_accrual	- iTPM - MR Transaction Accruals (Sc)
customdeploy_itpm_delete_promotion_recor	- iTPM Delete Promotion Record
customdeploy_itpm_mr_allow_new_item_grp	- iTPM MR Allowance for New Item(Sc)
customdeploy_itpm_mr_bulk_settlement_pro	- iTPM MR Bulk Settlement Process
customdeploy_itpm_mr_kpi_deletequeuevec	- iTPM MR Delete KPI Queue Records
customdeploy_itpm_mr_overnight_proplan	- iTPM MR Overnight Process Plan
customdeploy_itpm_mr_sc_rel_ddn_update	- iTPM MR SC Related Deduction Updation
customdeploy_itpm_update_pr_period_share	- iTPM MR Update Promotion Period Share
customdeploy_itpm_promolinked_approved	- iTPM PromoLinked Records for approved

Optional: If you need KPIs by promotion, period **AND** item also schedule these scripts:

- iTPM - MR By Item Period Share,
- iTPM - MR Inactive By Item Period Share,
- iTPM - MR Update By Item Period Share

The list above shows typical scripts that should be scheduled if you use all iTPM modules:

- If you don't use iTPM to apply off-invoice to sales orders, don't schedule this:

customdeploy_itpm_mr_nboi_rem_discounts - iTPM - MR NBOI Processing

- If you don't use the iTPM Excel planner, then you don't need to schedule this:

customdeploy_itpm_mr_plan - iTPM - MR - Plan to Promotion(Sc)

- Schedule "- iTPM MR Period Based Transactions" to create iTPM period accruals.

2.3 B.2 Scheduled scripts For Deduction Management ONLY: (No promotion planning, no promotional settlements)

iTPM form and button: Deductions	Map Reduce Scripts to SCHEDULE	UNSCHEDULED scripts that are chain-run by the scheduled script
Deduction: SPLIT, CSV SPLIT buttons	- iTPM - MR Deduction Split Process	
Mass Non G/L Update form	- iTPM - MR Non GL Mass Update	
Mass Expense form Deduction: EXPENSE , and CSV Bulk Expense	- iTPM - MR Deduction Write-Off (Sc) ----->	- iTPM - Deduction Bulk Expense - iTPM MR Deduction Last Resolved
CSV Split button	- iTPM - Deduction Split CSV Import Task (Type = Scheduled task, not Map-Reduce)	
Re-apply deduction to the invoice	- iTPM - MR Apply Detached Invoice	
Update Deduction status and open balance when the iTPM Statement Charge is deleted.	- iTPM MR SC Related Deduction Updation	

2.3 B.3 Scheduled scripts for Promotional Settlements:

iTPM form and button: Deductions	Map Reduce Scripts to SCHEDULE	UNSCHEDULED scripts that are chain-run by the scheduled script
Deduction: SETTLEMENT button	- iTPM - MR Settlement Lines	
CSV Bulk Settlement (Also the Resolve Deductions button on the promotion.)	- iTPM - MR Bulk Settlement Process	

2.3 B.4 Scheduled scripts for Promotion Planning: Schedule these if you create promotions.

iTPM form and button: Promotions	Map Reduce Scripts to SCHEDULE	UNSCHEDULED scripts that are chain-run by the scheduled script
Promotion: Process Plan button	- iTPM MR Inactive Related Records (Sc) ----->	- iTPM - Create Promo Linked Records
Overnight process Allowances & KPIs	- iTPM MR Allowance for New Item (Sc) -----> - iTPM MR Overnight Process Plan ----->	- iTPM MR Overnight Allowances sold - iTPM MR Schedule KPI Queue
Promotion: Update Estimate, Modify buttons	- iTPM PromoLinked Records for approved	
Refresh KPIs	- iTPM - MR All Contribution for Draft(Sc) -----> - iTPM - MR Allocation Contribution (SC) -----> - iTPM - MR KPI Summary Field Calcs (Other Promotions)	- iTPM - MR KPI Draft Promo Calculations - iTPM - MR KPI Summary Field Calcs - iTPM - MR KPI New Calculations - iTPM - MR KPI Summary Field Calcs - iTPM - MR KPI New Calculations
Promotion: Copy Promotion button	- iTPM - Copy Promotion	
Promotion: Delete Promotion button	- iTPM Delete Promotion Record	
For new items added to NetSuite item groups	- iTPM MR Allowance for New Item(Sc)	
Clean-up scripts:	- iTPM - MR Inactive By Item Period Share - iTPM - MR Inactive Related Records - iTPM - MR Inactive Related Records(delete) - iTPM - MR Delete KPI Queue Records - iTPM MR Delete Period Share Records	

B.5 For Promotion KPIs by Netsuite Period: (Optional) Schedule these if you need KPIs by NetSuite Period

iTPM form and button: Promotions	Map Reduce Scripts to SCHEDULE	UNSCHEDULED scripts that are chain-run by the scheduled script
Optional: Allocate promotion KPIs to NetSuite Periods	- iTPM - MR Promotion Period Share - iTPM - MR Update promotion Period Share	
Optional: Allocate promotion KPIs period and item.	- iTPM - MR Update item Period Share - iTPM - MR By Item Period Share	

2.3 B.6 Scheduled scripts for Applying Off-invoice to Sales orders:

iTPM form and button: Sales Orders	Map Reduce Scripts to SCHEDULE	UNSCHEDULED scripts that are chain-run by the scheduled script
Sales order: “Apply iTPM discounts” sales order checkbox.	- iTPM - MR NBOI Processing (remove)---->	- iTPM - MR NBOI Processing

2.3 B.7 Scheduled scripts for creating promotions an Excel Planning Template:

iTPM form and button: Event Plans	Map Reduce Scripts to SCHEDULE	UNSCHEDULED scripts that are chain-run by the scheduled script
Plan to Promotion script validate and create iTPM Promotions from your Event plan data. Only schedule if you use this feature.	- iTPM - MR - Plan to Promotion (Sc)----->	- iTPM - MR - Plan item Delete

2.3 B.8 Scheduled scripts for creating accruals:

iTPM Accruals	Map Reduce Scripts to SCHEDULE	UNSCHEDULED scripts that are chain-run by the scheduled script
Event-based accrual Accruals.	- iTPM MR Transaction Accruals (Sc)----->	- iTPM MR Estimated Accruals - iTPM MR LumpSum Accruals - iTPM - MR Overpay Accruals - iTPM - MR Accrual CorrectAdjustment
Period-based accruals	- iTPM MR Period Based Transactions	

2.3 C. First time install tasks: Deduction management

If you want to use iTPM reason codes in your credit memos, confirm the iTPM reason code field is applied to the lines of the credit memo form that you'll use to create iTPM deductions:

1. **Customization -> Lists, records and fields -> Transaction Line fields**
2. Look for and find "**iTPM Reason Code for Deductions**", and click on the link.

Transaction Line Fields

New

+ FILTERS

SHOW INACTIVES

#	DESCRIPTION ▲	FROM BUNDLE	ID	INTERNAL ID	TYPE	LIST
121	iTPM Reason Code for Deductions	312604	custcol_itpm_reasoncode_deductions	3345	List/Record	- iTPM Deduction Reason Codes

3. Click on **APPLY TO FORMS**

Transaction Line Field

Save Cancel Change ID **Apply to Forms** Actions ▼

4. Look for the rows with the credit memos you use, and **check the checkbox** to SHOW reason codes in the form.
5. **SAVE**

Apply Custom Field to Forms

Save Cancel

CUSTOM FIELD
ITPM Reason Code for Deductions

Items • Expenses •

Mark All Unmark All Reset Labels

FORM NAME	FORM TYPE ▲	SHOW
Z - Vendor Bill	Bill	<input type="checkbox"/>
Z - Vendor Credit	Bill Credit	<input type="checkbox"/>
Z - Cash Refund	Cash Refund	<input type="checkbox"/>
Z - Cash Sale Form	Cash Sale	<input type="checkbox"/>
Z - Default Check	Check	<input type="checkbox"/>
Z - Credit Memo	Credit Memo	<input checked="" type="checkbox"/>
Custom Credit Memo	Credit Memo	<input checked="" type="checkbox"/>
Custom Credit Memo 2	Credit Memo	<input checked="" type="checkbox"/>

2.3 D. First time install tasks: Configure Apply Off-invoice features

D. Task #1 for applying off-invoice: If you will use iTPM to apply off-invoice to sales orders, these steps will apply the "iTPM Discounts Applied?" field to your sales order transaction lines. (Make sure you do this for all the sales order forms you use with iTPM.)

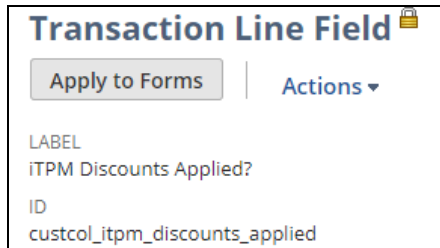
- Go to *Customizations->List/Records & Fields ->Transaction Line Field*
- Select "iTPM Discounts Applied?"



The screenshot shows the 'Transaction Line Fields' interface. At the top, there is a 'New' button and a 'FILTERS' section. Below that, there are icons for document, export, and print, along with a 'SHOW INACTIVES' checkbox. The main table has columns for '#', 'DESCRIPTION', 'FROM BUNDLE', 'ID', 'INTERNAL ID', and 'TYPE'. One record is visible with ID 14, description 'iTPM Discounts Applied?', and type 'Check Box'.

#	DESCRIPTION	FROM BUNDLE	ID	INTERNAL ID	TYPE
14	iTPM Discounts Applied?	312604	custcol_itpm_discounts_applied	8216	Check Box

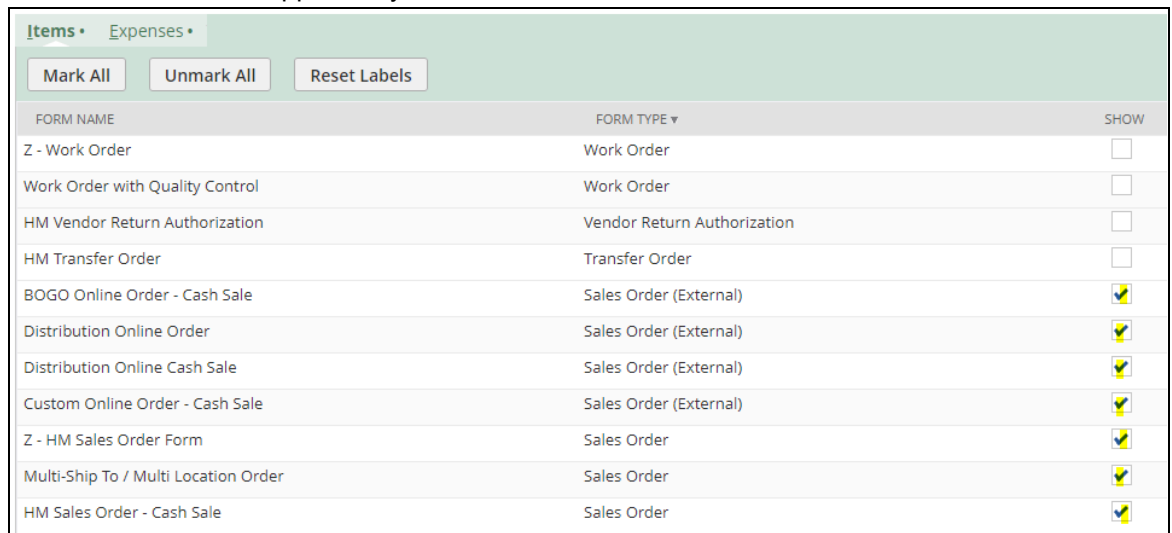
- Click the "Apply to Forms" button



The screenshot shows the details for a 'Transaction Line Field'. It has a title 'Transaction Line Field' with a lock icon. Below the title are two buttons: 'Apply to Forms' and 'Actions'. The 'LABEL' is 'iTPM Discounts Applied?' and the 'ID' is 'custcol_itpm_discounts_applied'.

LABEL	iTPM Discounts Applied?
ID	custcol_itpm_discounts_applied

- Make sure this field is applied to your sales order form.



The screenshot shows a list of 'Items' under the 'Expenses' category. At the top, there are buttons for 'Mark All', 'Unmark All', and 'Reset Labels'. The table has columns for 'FORM NAME', 'FORM TYPE', and 'SHOW'. The 'SHOW' column contains checkboxes, some of which are checked.

FORM NAME	FORM TYPE	SHOW
Z - Work Order	Work Order	<input type="checkbox"/>
Work Order with Quality Control	Work Order	<input type="checkbox"/>
HM Vendor Return Authorization	Vendor Return Authorization	<input type="checkbox"/>
HM Transfer Order	Transfer Order	<input type="checkbox"/>
BOGO Online Order - Cash Sale	Sales Order (External)	<input checked="" type="checkbox"/>
Distribution Online Order	Sales Order (External)	<input checked="" type="checkbox"/>
Distribution Online Cash Sale	Sales Order (External)	<input checked="" type="checkbox"/>
Custom Online Order - Cash Sale	Sales Order (External)	<input checked="" type="checkbox"/>
Z - HM Sales Order Form	Sales Order	<input checked="" type="checkbox"/>
Multi-Ship To / Multi Location Order	Sales Order	<input checked="" type="checkbox"/>
HM Sales Order - Cash Sale	Sales Order	<input checked="" type="checkbox"/>

2.3 D. Task #2 for applying off-invoice: (This is optional. You don't have to use these buttons.)

If you use iTPM to apply off-invoice discounts to sales orders, these steps enable " **Apply or ReApply Discounts**" and "**Process OI Now**" buttons on the sales order form that will save you mouse clicks:

Step 1: Go to **Customizations -> Scripting -> Scripts**

Step 2: Set filter to see scripts from bundle **312604**, and **User Event**

Step 3: VIEW the script - **iTPM Button on Sales order**

Step 4: Go to **Deployments** subtab and open the deployment script. (Click on **Sales order** link)

Step 5: EDIT, check the DEPLOYED checkbox, then click SAVE.

(If Status is Testing, change to Release, and Log level = error.)

Now Buttons will appear on the sales order as designed

2.3 D. Task #3 for applying off-invoice:

If you are using the new Sales Order EDI report, you'll need to configure the parameter in the script so iTPM knows what field stores the customer requested price. This is used to compare the customer's price to the sales order and iTPM expected prices: **(Suitelet)**

Below are example internal IDs. Your IDs will be different.

You can also use blank parameters to get started and run the report without comparing iTPM values to your EDI values.

Script Deployment

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

SCRIPT - iTPM SU SO EDI Report	STATUS Released
TITLE - iTPM SU SO EDI Report	EVENT TYPE
ID customdeploy_itpm_su_so_edi_report	LOG LEVEL Error
<input checked="" type="checkbox"/> DEPLOYED	EXECUTE AS ROLE Current Role
	<input type="checkbox"/> AVAILABLE WITHOUT LOGIN
	URL /app/site/hosting/scriptlet.nl?script=1223&deploy=1

[Audience](#) • [Links](#) • **[Parameters](#)** • [Execution Log](#) • [System Notes](#)

- iTPM EDI UOM FIELD INTERNAL ID custcol_itpm_edi_uom	- iTPM EDI PRICE FIELD INTERNAL ID custcol_example_edi_price
--	---

2.3 D. Task #4 for applying off-invoice:

For those sales order forms where you want iTPM to apply discounts, you will need to make iTPM checkboxes visible under the iTPM subtab on the sales order.

1. VIEW a sales order, hover over CUSTOMIZE in the upper right corner, and click on **CUSTOMIZE FORM**.
2. Go to the Screen Field subtab, and the iTPM sublist.
3. Check these checkboxes, and set "Apply iTPM Discounts" to default to CHECKED in new sales orders:

Screen Fields							
Main • Items • Promotions • Address • Shipping • Messages • Custom • iTPM • Total_Box •							
Move To Top Move To Bottom New Field							
LABEL	SHOW	MANDATORY	DISPLAY TYPE	CHECK BOX DEFAULT	DESCRIPTION	COLUMN BREAK	
Settlement Record	<input type="checkbox"/>	<input type="checkbox"/>	Normal		Settlement Record	<input type="checkbox"/>	
Promotion / Deal (2)	<input type="checkbox"/>	<input type="checkbox"/>	Normal		Promotion / Deal	<input type="checkbox"/>	
Apply iTPM Discounts	<input checked="" type="checkbox"/>		Normal	Checked	Apply iTPM Discounts	<input type="checkbox"/>	
iTPM Discounts Applied	<input checked="" type="checkbox"/>		Disabled	Use Field Default	iTPM Discounts Applied	<input type="checkbox"/>	
Remove iTPM Discounts	<input checked="" type="checkbox"/>		Normal	Use Field Default	Remove iTPM Discounts	<input type="checkbox"/>	
Auto-create deduction on first s	<input type="checkbox"/>		Normal	Use Field Default	Auto-create deduction on first save?	<input type="checkbox"/>	
Created By	<input type="checkbox"/>	<input type="checkbox"/>	Normal		Created By	<input type="checkbox"/>	
No Overlapping promotions / ite	<input checked="" type="checkbox"/>		Normal	Use Field Default	No Overlapping promotions / items / Override	<input checked="" type="checkbox"/>	
SKIP fixed-price discounts for th	<input checked="" type="checkbox"/>		Normal	Use Field Default	SKIP fixed-price discounts for this sales order	<input type="checkbox"/>	
DO NOT apply/remove iTPM dis	<input checked="" type="checkbox"/>		Normal	Use Field Default	DO NOT apply/remove iTPM discounts on THIS sales order	<input type="checkbox"/>	
Create deduction on save	<input type="checkbox"/>		Normal	Use Field Default	Create deduction on save	<input type="checkbox"/>	
Only header level discounts app	<input checked="" type="checkbox"/>		Inline Text	Use Field Default	Only header level discounts applied	<input checked="" type="checkbox"/>	

4. Do the above steps for every sales order that iTPM will apply discounts.
5. Confirm these checkboxes are visible on this sales order.

Items Address Shipping Messages History iTPM iTPM Discounts	
<input type="checkbox"/> APPLY iTPM DISCOUNTS	<input type="checkbox"/> NO OVERLAPPING PROMOTIONS / ITEMS / OVERRIDE
<input checked="" type="checkbox"/> iTPM DISCOUNTS APPLIED	<input type="checkbox"/> SKIP FIXED-PRICE DISCOUNTS FOR THIS SALES ORDER
<input type="checkbox"/> REMOVE iTPM DISCOUNTS	<input type="checkbox"/> DO NOT APPLY/REMOVE iTPM DISCOUNTS ON THIS SALES ORDER
<input type="checkbox"/> ONLY HEADER LEVEL DISCOUNTS APPLIED	
Deductions Settlements Applied_Transactions Invoice Related Deductions	

Note: "Only header level discounts applied" is available in iTPM version 24.2.2 and later versions. You'll also need to create a subtotal item for if you apply discounts to sales orders and don't already have one:

2.3 D. Task #5 for applying off-invoice:

1. Setup -> Accounting -> Item-> New
2. Select the type as "Subtotal"
3. Enter "Sub-total" as the name, then SAVE.

Note: If you enter "Subtotal" without the hyphen, you may get a message that there already is a subtotal by that name. Enter the description with a "-" to get around the error message.

2.3 E. First time install tasks: Document script parameters changes (if any)

If you change any of the default iTPM script parameters as you configure iTPM, be sure to document those changes. It is a good practice to do a quick review of custom parameter settings every time you update iTPM to a new version.

iTPM Script: Deductions	Default Parameter setting	Type
- iTPM - MR Deduction Split Process	New Deductions always have a current date: Default = <i>UNCHECKED</i>	MR
- iTPM MR Settlement Lines	- iTPM Settlement record type ID - <i>iTPM Settlement</i>	MR
- iTPM - MR Apply Detached Invoice	iTPM MR Deduction Invoice Search: - <i>iTPM Deductions Detached from Invoices</i>	MR
- iTPM - Deduction Buttons Applies to - iTPM Deduction	UE_DDN_CLIENT Script Path <i>/iTPM_Attach_Deduction_Buttons.js</i> - iTPM Settlement Permission Rec Type ID - <i>iTPM Settlements Permission</i> - iTPM Deductions Permission Rec Type ID - <i>iTPM Deductions Permission</i> - iTPM Expense Queue Rec Type ID - <i>iTPM Expense Queue</i> - iTPM Deduction Approval by Sal Rec Type ID - <i>iTPM Deduction Approval By Sales</i> - iTPM Deductions Delete Permission Rec Type ID - <i>iTPM Deductions Change Cust Permission</i> - iTPM Deduction Assign to Customer sales Rep when created Default: <i>UNCHECKED</i>	User Event
- iTPM - Invoice Deduction Buttons Applies to Invoice	- iTPM Deduction Permission - <i>iTPM Deductions Permission</i> - iTPM Deduction Record Type ID - <i>iTPM Deduction</i> - iTPM Deduction Assign to sales rep Default: <i>UNCHECKED</i>	User Event
- iTPM - Invoice Deduction Buttons Applies to Credit Memo	- iTPM Deduction Permission - <i>iTPM Deductions Permission</i> - iTPM Deduction Record Type ID - <i>iTPM Deduction</i> - iTPM Deduction Assign to customer sales rep when created Default: <i>UNCHECKED</i>	User Event
- iTPM SU Related Promotions	Customer Attribute <i>employee</i> Customer Attribute FieldID on Customer Record <i>salesrep</i>	Suitelet
- iTPM - Deduction Promotion List	- iTPM Customer Attribute <i>salesrep</i> Include matching promotions across all subsidiaries Default: <i>UNCHECKED</i>	Suitelet
- iTPM - Deduction Split CSV Import Task	- iTPM CSV Task Import ID Default: <i>Blank</i> (ID the last time this script executed.)	Scheduled

iTPM Script: Promotions	Default Parameter setting	Type
- iTPM - MR KPI New Calculations	- iTPM KPI Process: <i>EDITED</i>	MR
- iTPM - MR KPI New Calculations 1	- iTPM KPI Process: <i>SCHEDULED</i>	MR
- iTPM - MR KPI New Calculations 2	- iTPM KPI Process: <i>SCHEDULED</i>	MR
- iTPM - Copy Promotion	Copied Promotion/Deal ID: <i>NULL</i>	MR
- iTPM MR - Promotion Period Share	Period Share Queue Search - <i>iTPM Promotion Period Share Queue</i>	MR
- iTPM - Promotion Processing	- iTPM Settlement Permission Record - <i>iTPM Settlements Permission</i> - iTPM Promotion Permission record - <i>iTPM Promotion</i> - iTPM promotion type permission record - <i>iTPM Promotion type</i> - iTPM Preferences Permission record - <i>iTPM Preferences</i> - iTPM Estimated Quantity Permission - <i>iTPM Estimated Quantity</i> - iTPM Promotion Planning Permission - <i>iTPM Promotion Planning</i> - iTPM Modify Approved Promotion - <i>iTPM Modify Approved Promotion</i> Is partner available in customer record? Default is UNCHECKED	User Event
- iTPM SU Mass Copy Promotion	- iTPM Promotion Record Permission - <i>iTPM Promotion</i> - iTPM Promotion Planning Permission - <i>iTPM Promotion Planning</i>	Suitelet
- iTPM SU Change Pending Form	Is partner available in customer record? Default is UNCHECKED	Suitelet

iTPM Scripts: Apply Off-invoice	Default Parameter setting	Type
- iTPM - MR NBOI Processing (Remove Discounts)	Rate in 4 decimals: Default is UNCHECKED	MR
- iTPM - MR NBOI Processing	Rate in 4 decimals: Default is UNCHECKED	MR
- iTPM SU SO EDI Report	- iTPM EDI UOM Field Internal ID custcol_itpm_edit_uom - iTPM EDIT price field internal ID custcol_example_edit_price	Suitelet

iTPM Scripts: Accruals	Default Parameter setting	Type
- iTPM - MR Estimated Accruals	Is estimated Qty Modified? Default is CHECKED	MR
- iTPM - MR Estimated Accruals 2	Is estimated Qty Modified? Default is UNCHECKED	MR
- iTPM MR Transaction Accruals	iTPM MR Transaction Accrual Search: - <i>iTPM Event Accrual Source</i>	MR
- iTPM UE Period Based Accruals	- iTPM Include Customer Attribute <i>partner</i> - iTPM Exclude Customer Attribute <i>employee</i>	User Event
- iTPM SU Period Based Accruals	Include Customer attribute <i>employee</i> Exclude customer attribute <i>partner</i>	Suitelet
- iTPM MR Period Based Transactions	Include Customer Attribute <i>salesrep</i> Exclude customer attribute <i>partner</i> Date Default: <i>NULL</i> Allow Accruals for customers above transaction sub Default: UNCHECKED Include Item Attribute Default: <i>Classification</i>	MR

Use Chapter 4 in the *Administrator User Guide* to finish the first-time setup and configuration of iTPM:
 (Skip the bolded steps below if only using the deduction management iTPM functionality.)

Setup tasks: (Skip bolded steps if only using Deduction Management)	Status / Notes
Step 1: Setup the GL-accounts for Trade Promotion	
Step 2: Setup off-invoice discount item & statement charge item	
Step 3: Setup iTPM Preferences	
Step 4: Setup Promotional Activity (Optional)	
Step 5: Setup Promotion Types	
Step 6: Setup Deduction Reason Codes, Research Status, Next Steps, & Group	
Step 7: Flag Items available for iTPM allowances	
Step 8: Create NetSuite Item Groups for Allowances (optional)	
Step 9: Set the Default Sales Order Status and Configure Sales Order Report	
Step 10: Setup iTPM roles and permissions	
Step 11: Show both item code, display name, Review UOM Descriptions (optional)	
Step 12: Set NetSuite Accounting Preference for JE bulk approval (optional)	
Step 13: Setup customers that apply off-invoice based on ship dates	
Step 14: Dashboard Portlets, Workbooks and Reminders (optional)	
Step 15: Configure Event-Based Accruals (optional)	
Step 16: Update your new Item checklist / workflow	
Step 17: Update your Month-end close checklist and reconciliation	
Step 18: TPM Cut-over date and legacy data options	
Step 19: Test your iTPM Setup	
Step 20: Document your transition plan for promotions / deductions	


2.4 UPDATE iTPM in your Sandbox (or Release Preview account)

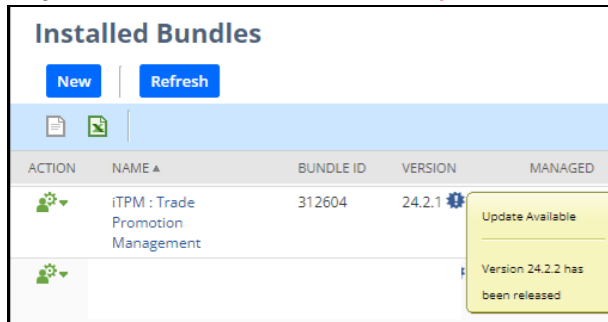
Updating a NetSuite Managed Bundle should generally follow the standard NetSuite updating steps.

Step 1: Prepare for updating iTPM:

- For [task #1](#), get screenshots of the scheduled custom support scripts, and the standard iTPM scripts that were replaced (if any).
- For [task #2](#), make a list of the custom roles with iTPM permissions (if any).
- For [task #3](#), make a screenshot of the scripts that are currently scheduled.
- For [task #4](#), confirm you have the list of your customized iTPM script parameters.
- See if you need to download a list of settlement adjustments and voided settlements [before updating](#) iTPM.

Step 2: Update the iTPM SuiteApp:

1. Confirm your account is not scheduled for [maintenance](#) when you want to update iTPM.
2. Go to **Customization > SuiteBundler > Search & Install Bundles -> LIST**.
3. Scroll up/down and find iTPM.
4. If iTPM is already installed in your account, NetSuite will show you that an update is available.
5. Click on the  green person/gear to the left of iTPM for a drop-down menu.
6. **On the drop-down menu select UPDATE. (DO NOT SELECT UNINSTALL)**



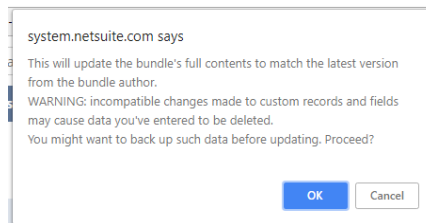
7. Follow the NetSuite update steps.

- a. Click UPDATE BUNDLE.

Preview Bundle Update



- b. Click OK.



- c. Click REFRESH to see the status of the iTPM update.



After iTPM is updated, **be sure to perform ALL [administrator tasks](#) listed in section 2.6.** The iTPM support team can do this for you. Email support@cgsquared.com.

2.5 UPDATE iTPM in production

ONLY CG Squared can push updates of iTPM in production accounts.

Step 1: Contact CG Squared to schedule the update to iTPM in production.

Step 2: Prepare for updating iTPM:

- For [task #1](#) after the update, get screenshots of the scheduled custom support scripts, and the standard iTPM scripts that were replaced (if any).
- For [task #2](#) after the update, make a list of the custom roles with iTPM permissions (if any).
- For [task #3](#) after the update, make a screenshot of the scripts that are currently scheduled.
- For [task #4](#) after the update, confirm you have the list of your customized iTPM script parameters.

Make sure your account is not scheduled for maintenance when you are updating iTPM.

1. Go to *Setup-> Company -> Administrative Notifications*
2. Go to the *Confirmed* subtab and sort the notices so the newest notices are on the top.

Administrative Notifications			
Options •		Confirmed •	Pending Confirmation
NOTIFICATION TYPE	CONFIRMED BY	DATE CONFIRMED	MESSAGE TEXT
Scheduled Maintenance	Girish Gunturi	3/27/2019 2:25 pm	As a courtesy, this communication is to notify you of scheduled downtime for your NetSuite account(s) during a planned maintenance window as we perform hardware maintenance.

3. Look at the list and confirm there is no maintenance or down-time scheduled. Postpone your iTPM update if your account is scheduled for maintenance or downtime.



IMPORTANT: DO NOT UNINSTALL iTPM from your live production account.

Doing so after go-live will result in the loss of iTPM data, including all promotional data and custom transaction records that resolve your short-pays.



IMPORTANT: UPDATE iTPM in your SANDBOX and/or Release Preview account for testing BEFORE UPDATING iTPM in your live production account. While iTPM is easy to update, **trade promotion has a material impact on your company's financial statements.** We recommend sandbox testing prior to updating in production.

1. Before you request iTPM to be installed for the first time, confirm your production account has all of the necessary [prerequisites](#).
2. Email support@cgsquared.com to let us know you want iTPM installed in your production account. CG Squared will typically push the update after business hours, as recommended by NetSuite. Your administrator will receive notification that iTPM has been updated.
3. **After the update is done, review and perform the [administrator tasks](#) listed in section 2.6.**



Note: After iTPM is updated, you may see a few script errors. These errors typically end after 12 midnight on the day iTPM is updated. Email support@cgsquared.com if you observe iTPM NetSuite error messages the day after iTPM has been updated.

2.6 iTPM Administrator tasks (After Updating iTPM)



Important: If you skipped any iTPM updates, be sure to read the release notes for previous versions. You may need to perform some or all of those administrator tasks for the previous versions. If in doubt as to what tasks to perform after iTPM is updated, contact support@cgsquared.com.

2.6 Task #1: Review custom support scripts (if any)

- If your organization or the CG Squared team created custom support scripts, it is important to review support scripts.
- Before updating iTPM, you took screenshots of the scheduled custom support scripts, and the standard iTPM scripts that were replaced.
 - In script lists, these typically are next to each other in the list
 - Both scripts typically start with the same name. The support script ends with `_supp`.
- If the new version of iTPM made changes to the script that was replaced by a support script, then the iTPM team may need to update the support script code for it to work properly.
- After iTPM is updated, compare your screenshots to the scripts. Unschedule, and sometimes un-deploy, the standard iTPM scheduled scripts that were replaced by custom scripts.



IMPORTANT: If you have custom support scripts, the standard iTPM script must be **unscheduled and undeployed** after iTPM is updated. Email support@cgsquared.com for help updating iTPM in your NetSuite instances.

2.6 Task #2 Review and update permissions in custom roles (if any)

- If you use iTPM standard roles, no action is needed. Skip ahead to task #3.
- If you add iTPM permissions to your custom roles, then do these tasks:
 - Make a list of the custom roles with iTPM permissions
 - Release notes will identify if permissions changed in any standard iTPM role.
 - You can also use *Setup -> Users/Roles -> Show Role Differences* and compare your custom roles with iTPM permissions to the corresponding iTPM standard role.
 - Add permissions as appropriate to your custom roles.
- More details on role permissions in Chapter 5 of the iTPM Admin User Guide.

2.6 Task #3: Review scheduled iTPM scripts

- Typically, the same scheduled scripts should also be scheduled after iTPM is updated.
- Before updating iTPM, you took screenshots of the scripts that were scheduled.
- After iTPM is updated, review the map-reduced scheduled scripts in NetSuite versus the scripts that were scheduled before the update.
- Compare the scheduled scripts to the typical scheduled scripts on the next page.
- For more details on schedule scripts go to [First time install tasks: Decide which scripts should be scheduled:](#)

The list below shows typical scripts that should be scheduled if you use all iTPM modules:

- If you don't use iTPM to apply off-invoice to sales orders, don't schedule this:

customdeploy_itpm_mr_nboi_rem_discounts	- iTPM - MR NBOI Processing
---	-----------------------------

- If you don't use the iTPM Excel planner, then you don't need to schedule this:

customdeploy_itpm_mr_plan	- iTPM - MR - Plan to Promotion(Sc)
---------------------------	-------------------------------------

- Schedule "- iTPM MR Period Based Transactions" to create iTPM period accruals.

These are the typical iTPM SCHEDULED scripts: (changed for 24.2.2)

If you only use the deduction module, only schedule the 7 yellow-highlight scripts below:

ID	SCRIPT ▲
customdeploy_itpm_promodeal_cpy	- iTPM - Copy Promotion
customdeploy_itpm_ddn_splitcsvtaskimport	- iTPM - Deduction Split CSV Import Task
customdeploy_itpm_mr_allcontrbtndraft	- iTPM - MR All ContributionForDraft(SC)
customdeploy_itpm_mr_allocationcontrbtn	- iTPM - MR Allocation Contribution(SC)
customdeploy_itpm_mr_apply_detachec_inv	- iTPM - MR Apply Detached Invoice
customdeploy_itpm_mr_ddn_splitprocess	- iTPM - MR Deduction Split Process
customdeploy_itpm_mr_ddn_writeoff	- iTPM - MR Deduction Write-Off(Sc)
customdeploy_itpm_mr_delete_period_share	- iTPM - MR Delete Period Share Records
customdeploy_itpm_mr_delete_processplan	- iTPM - MR Inactive Related Records(Sc)
customdeploy_itpm_mr_inactive_relatedrec	- iTPM - MR Inactive Related Records(Sc)
customdeploy_itpm_mr_kpi_newcalschedule1	- iTPM - MR KPI New Calculations
customdeploy_itpm_mr_kpi_sum_field_calc3	- iTPM - MR KPI Summary Field Calcs
customdeploy_itpm_mr_nboi_rem_discounts	- iTPM - MR NBOI Processing
customdeploy_itpm_mr_nongl_mass_update	- iTPM - MR Non GL Mass Update
customdeploy_itpm_mr_promo_period_share	- iTPM - MR Promotion Period Share
customdeploy_itpm_mr_schedule_kpi_queue	- iTPM - MR Schedule KPI Queue
customdeploy_itpm_mr_settlementlines	- iTPM - MR Settlement Lines
customdeploy_itpm_mr_transaction_accrual	- iTPM - MR Transaction Accruals (Sc)
customdeploy_itpm_delete_promotion_recor	- iTPM Delete Promotion Record
customdeploy_itpm_mr_allow_new_item_grp	- iTPM MR Allowance for New Item(Sc)
customdeploy_itpm_mr_bulk_settlement_pro	- iTPM MR Bulk Settlement Process
customdeploy_itpm_mr_kpi_deletequeuerec	- iTPM MR Delete KPI Queue Records
customdeploy_itpm_mr_overnight_proplan	- iTPM MR Overnight Process Plan
customdeploy_itpm_mr_sc_rel_ddn_update	- iTPM MR SC Related Deduction Updation
customdeploy_itpm_update_pr_period_share	- iTPM MR Update Promotion Period Share
customdeploy_itpm_promolinked_approved	- iTPM PromoLinked Records for approved

Optional: If you need KPIs by promotion, period **AND** item also schedule these scripts:

- iTPM - MR By Item Period Share,
- iTPM - MR Inactive By Item Period Share,
- iTPM - MR Update By Item Period Share

2.6 Task #4: Review customized iTPM script parameters (if any)

- Most iTPM script parameters are not changed from default values.
- If you have any customized parameters, review the stored [parameter value in iTPM scripts](#) to confirm they haven't changed when iTPM was updated.

If you use Period Accruals, this is an important task. Review the parameters in each of these scripts!

Make sure the **parameters** in step 15c in the Admin User Guide are populated correctly.

- User Event Script: - iTPM UE Period Based Accruals
- Suitelet: - iTPM SU Period Based Accruals
- Map Reduce Script: - iTPM MR Period Based Transaction

2.6 Update to 24.2.2: October 2024

A: If you use iTPM to create period-based accruals, version 24.2.2 includes a new parameter for filtering period accruals by item attribute. (**Suitelet** called *iTPM SU Item Attribute Period based*)

In the example below, the NetSuite class attribute is entered as 'classification' as the parameter.

Script Deployment

← → List

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

SCRIPT	iTPM SU Item Attribute Period based	STATUS	Released
TITLE	iTPM SU Item Attribute Period based	EVENT TYPE	
ID	customdeploy_itpm_su_itemattribute	LOG LEVEL	Error
<input checked="" type="checkbox"/> DEPLOYED		EXECUTE AS ROLE	Current Role
		<input type="checkbox"/> AVAILABLE WITHOUT LOGIN	
		URL	/app/site/hosting/scriptlet.nl?script=2017&deploy=1

[Audience](#) • [Links](#) • **[Parameters](#)** • [Execution Log](#) • [System Notes](#)

- ITPM ITEM ATTRIBUTES
classification



Note: If you use a custom segment to determine which item qualify for the period-accrual, you'll need to contact the iTPM Help Desk at support@cgsquared.com.

B: If you use iTPM to apply discounts to sales orders, you'll also need to make this new "Only header level discounts applied" checkbox visible on sales orders where iTPM applies discounts:

1. VIEW a **sales order**, hover over CUSTOMIZE in the upper right corner, and click on **CUSTOMIZE FORM**.
2. Go to the Screen Field subtab, and the iTPM sublist.
3. Check these checkboxes, and set "Only header level discounts applied" to show, and in a new column.

LABEL	SHOW	MANDATORY	DISPLAY TYPE	CHECK BOX DEFAULT	DESCRIPTION	COLUMN BREAK	SPACE BEFORE	SAME ROW AS PREVIOUS
Settlement Record	<input type="checkbox"/>	<input type="checkbox"/>	Normal		Settlement Record	<input type="checkbox"/>		<input type="checkbox"/>
Promotion / Deal (2)	<input type="checkbox"/>	<input type="checkbox"/>	Normal		Promotion / Deal	<input type="checkbox"/>		<input type="checkbox"/>
Apply iTPM Discounts	<input checked="" type="checkbox"/>		Normal	Checked	Apply iTPM Discounts	<input type="checkbox"/>		<input type="checkbox"/>
iTPM Discounts Applied	<input checked="" type="checkbox"/>		Disabled	Use Field Default	iTPM Discounts Applied	<input type="checkbox"/>		<input type="checkbox"/>
Remove iTPM Discounts	<input checked="" type="checkbox"/>		Normal	Use Field Default	Remove iTPM Discounts	<input type="checkbox"/>		<input type="checkbox"/>
Auto-create deduction on 1	<input type="checkbox"/>		Normal	Use Field Default	Auto-create deduction on first save?	<input type="checkbox"/>		<input type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>	Normal		Created By	<input type="checkbox"/>		<input type="checkbox"/>
No Overlapping promotior	<input checked="" type="checkbox"/>		Normal	Use Field Default	No Overlapping promotions / items / Override	<input checked="" type="checkbox"/>		<input type="checkbox"/>
SKIP fixed-price discounts	<input checked="" type="checkbox"/>		Normal	Use Field Default	SKIP fixed-price discounts for this sales order	<input type="checkbox"/>		<input type="checkbox"/>
DO NOT apply/remove ITP	<input checked="" type="checkbox"/>		Normal	Use Field Default	DO NOT apply/remove iTPM discounts on THIS sales order	<input type="checkbox"/>		<input type="checkbox"/>
Create deduction on save	<input type="checkbox"/>		Normal	Use Field Default	Create deduction on save	<input type="checkbox"/>		<input type="checkbox"/>
Only header level discount	<input checked="" type="checkbox"/>		Inline Text	Use Field Default	Only header level discounts applied	<input checked="" type="checkbox"/>		<input type="checkbox"/>

4. Do the above steps for every sales order that iTPM will apply discounts.
5. Confirm these checkboxes are visible on this sales order.

Items	Address	Shipping	Messages	History	iTPM	iTPM Discounts
<input type="checkbox"/> APPLY ITPM DISCOUNTS					<input type="checkbox"/> NO OVERLAPPING PROMOTIONS / ITEMS / OVERRIDE	<input type="checkbox"/> ONLY HEADER LEVEL DISCOUNTS APPLIED
<input checked="" type="checkbox"/> ITPM DISCOUNTS APPLIED					<input type="checkbox"/> SKIP FIXED-PRICE DISCOUNTS FOR THIS SALES ORDER	
<input type="checkbox"/> REMOVE ITPM DISCOUNTS					<input type="checkbox"/> DO NOT APPLY/REMOVE ITPM DISCOUNTS ON THIS SALES ORDER	

C: If you apply discounts to sales orders, you'll need to create a subtotal item if you don't already have one:

1. Setup -> Accounting -> Item-> New
2. Select the type as "Subtotal"
3. Enter "Sub-total" as the name.
4. Save.

Note: If you enter "Subtotal" without the hyphen, you may get a message that there already is a subtotal by that name. Enter the description with a "-" to get around the error message.

D: If you are updating to 24.2.2 and you used iTPM before January 2023, we recommend you use a CSV import to populate two checkboxes in your settlements. iTPM version 23.1.1 was the first version to specifically identify voiding settlements and settlement adjustments using a checkbox in the settlement header.

This step is optional. If you do not populate these checkboxes, the iTPM -> Resolutions -> All Settlements will not have the correct color shading in settlements created before iTPM 23.1.1.

Before updating to 24.2.2, take these steps. (The iTPM support team can do this for you.)

- Create a CSV import using iTPM -> Resolutions -> Voiding settlements. Use a CSV import to check the "Voiding Settlement" checkbox in these settlements.
- Create a CSV import using iTPM -> Resolutions -> Settlement Adjustments. Use a CSV import to check the "Settlement Adjustment" checkbox in these settlements.

2.6 Update to 24.2.1: August 2024

Version 24.2.1 added two new method-of-payments to iTPM. iTPM will use these new MOPs in the next version to apply discounts to sales orders at the header level.

No action is required if:

- If you are installing iTPM for the first time, then you will have the new MOPs, ID=6 and ID=7.
- If you do not need to use these new MOPs,
- Note: you can add these extra records in the future as needed.

If you use iTPM to apply discounts to sales orders, and you do not see "Header discount" and "Header charge" in the "- iTPM Method of Payment" list, contact the iTPM team.

This table is locked, and **the new MOPs must be IDs 6 and 7** for this new feature to work.

EDIT VIEW		INTERNAL ID ▲	NAME
Edit View		1	Bill-Back
Edit View		2	Net-Bill
Edit View		3	Off-Invoice
Edit View		4	Fixed Price
Edit View		6	Header discount
Edit View		7	Header charge

2.6 Update to 24.1.2: May 2024

See new overview of 24.1.2 new features: In NetSuite, go to **iTPM -> Help -> See what is new in iTPM**

Task #1: (Update to 24.1.2)

New parameters in the script "**- iTPM - Promotion Processing**" are populated with these values below, including "**- iTPM Modify Approved Promotion**" and a checkbox "Is partner available in customer record?" The checkbox defaults to UNCHECKED. (**User Event**, with record type = "- iTPM Promotion")

The screenshot shows the 'Script Deployment' interface for the script '- iTPM - Promotion Processing'. The interface includes buttons for 'Edit', 'Back', and 'Actions'. The script details are as follows:

PROPERTY	VALUE	PROPERTY	VALUE
SCRIPT	- iTPM - Promotion Processing	STATUS	Released
APPLIES TO	- iTPM Promotion	EVENT TYPE	
ID	customdeploy_itpm_promo_processing	LOG LEVEL	Error
DEPLOYED	<input checked="" type="checkbox"/>	EXECUTE AS ROLE	Current Role

Below the deployment details, there are tabs for 'Audience', 'Scripts', 'Parameters', 'Context Filtering', 'Execution Log', and 'System Notes'. The 'Parameters' tab is active, showing a list of permissions and a checkbox:

- iTPM SETTLEMENT PERMISSIONS RECORD
- iTPM Settlements Permission
- iTPM PROMOTION PERMISSION RECORD
- iTPM Promotion
- iTPM PROMOTION TYPE PERMISSION RECORD
- iTPM Promotion Type
- iTPM PREFERENCES PERMISSION RECORD
- iTPM Preferences
- iTPM ESTIMATED QUANTITY PERMISSION
- iTPM Estimated Quantity
- iTPM PROMOTION PLANNING PERMISSION
- iTPM Promotion Planning
- iTPM MODIFY APPROVED PROMOTION
- iTPM Modify Approved Promotion
- IS PARTNER AVAILABLE IN CUSTOMER RECORD?

Task #2: (Update to 24.1.2)

There are two new role permissions for planning to make changes to approved promotions:

- iTPM Modify Promotion

-> EDIT gives permission to see the MODIFY button.

-> FULL gives permission to APPROVE & REJECT changes to approved promotions.

- iTPM Planning Permission

-> EDIT or higher gives permission to add new items to approved promotions.

If you have customized roles with iTPM permissions, add these permissions to your roles if you want these roles to be able to request and/or approve changes to approved promotions.

If your planning team currently uses the UPDATE ESTIMATE button, you can decide if you want to turn off this feature and require all changes to approved promotions to be approved.

2.6 Update to 24.1.1: January 2024

See new overview of 24.1.1 new features: In NetSuite, go to *iTPM* -> **Help** -> **See what is new in iTPM**

Task #1: (Update to 24.1.1)

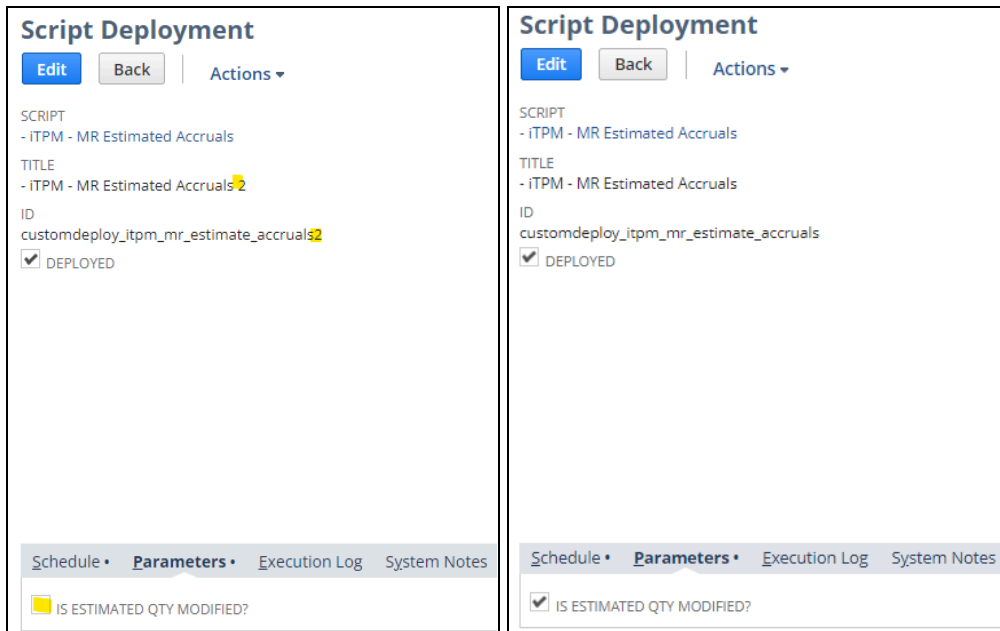
After updating to iTPM 24.1.1, users may not see the CLOSE button on the promotion when they should. This is because the promotion workflow is changed to use a specific role permission.

Simply clicking on KPI Refresh will make the button visible. You can also use QUICK EDIT, then cancel without making changes. Another option is to put all promotions into the KPI Refresh queue.

1. Go to *iTPM* -> *Promotions* -> *List*, and set your filter to see all APPROVED promotions.
2. Use a CSV import to put these promotions into the KPI Refresh queue
 - a. Custom record is "- iTPM KPI Queue"
 - b. Map promotion "Name / Title" to Name
 - c. Set Queue Request type to "Ad Hoc"
3. To monitor the results, go to *iTPM* -> *Promotions* -> *KPI Processing Queue*

Task #2: (Update to 24.1.1)

Confirm the IS *ESTIMATED QTY MODIFIED?* parameter which is checked in "- *iTPM* - *MR Estimated Accruals*" is UNCHECKED in "- *iTPM* - *MR Estimated Accruals2*". (**Map Reduce** script)



2.6 Updating from iTPM from 23.1.1 or older:

- If you are updating iTPM from 23.2.1 or newer to 24.1.2, you are done with the administrative tasks.
- If your current version of iTPM is older than 23.2.1, continue on with the tasks in this chapter.

If updating from **iTPM 23.1.1**: (Skip if you previously performed this task.)

If you skipped updating to a version of iTPM, you may need to populate this parameter in the "- iTPM SU Mass Copy Promotions" script. (**Suitelet**) (or - iTPM Promotion)

Script Deployment

[Edit](#) [Back](#) | [Actions](#) ▾

SCRIPT - iTPM SU Mass Copy Promotions	STATUS Released
TITLE - iTPM SU Mass Copy Promotions	EVENT TYPE
ID customdeploy_itpm_su_mass_copy_promo	LOG LEVEL Error
<input checked="" type="checkbox"/> DEPLOYED	EXECUTE AS ROLE Current Role
	<input type="checkbox"/> AVAILABLE WITHOUT LOGIN
	URL /app/site/hosting/scriptlet.nl?script=1950&deploy=1

[Audience](#) • [Links](#) • [Parameters](#) • [Execution Log](#) [System Notes](#)

- iTPM PROMOTION RECORD PERMISSION	- iTPM PROMOTION PLANNING PERMISSION
- iTPM Promotion	- iTPM Promotion Planning

If you are updating **iTPM** with **21.1.1** from an older version of **iTPM**, you may need to populate some of these fields in the script "- iTPM - Deduction Buttons": (**User Event** on the record type = '- iTPM Deduction record'.

Script Deployment

[Edit](#) [Back](#) | [Actions](#) ▾ ← → List

SCRIPT - iTPM - Deduction Buttons	STATUS Released
APPLIES TO - iTPM Deduction	EVENT TYPE
ID customdeploy_itpm_ddn_buttons	LOG LEVEL Error
<input checked="" type="checkbox"/> DEPLOYED	EXECUTE AS ROLE Current Role

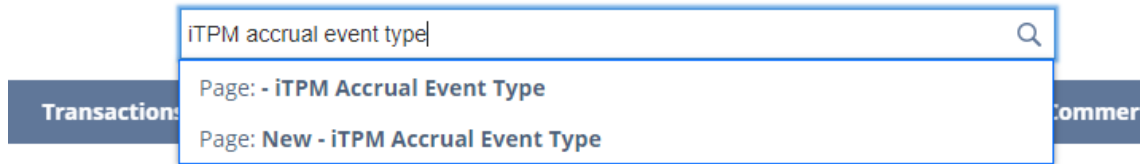
[Audience](#) • [Scripts](#) • [Parameters](#) • [Context Filtering](#) • [Execution Log](#) [System Notes](#)

UE_DDN_CLIENT SCRIPT PATH ./iTPM_Attach_Deduction_Buttons.js	- iTPM DEDUCTION APPROVAL BY SALES REC TYPE ID
- iTPM SETTLEMENT PERMISSION REC TYPE ID	- iTPM Deduction Approval by Sales
- iTPM Settlements Permission	- iTPM DEDUCTIONS DELETE PERMISSION REC TYPE ID
- iTPM DEDUCTION PERMISSION REC TYPE ID	- iTPM Deductions Delete Permission
- iTPM Deductions Permission	- iTPM DEDUCTIONS CHANGE CUSTOMER PERMISSION REC TYPE ID
- iTPM DEDUCTION SPLIT REC TYPE ID	- iTPM Deductions Change Cust Permission
- iTPM Deduction Split	<input type="checkbox"/> -iTPM DEDUCTION ASSIGN TO CUSTOMER SALES REP WHEN CREATED
- iTPM EXPENSE QUEUE REC TYPE ID	
- iTPM Expense Queue	

If updating from **iTPM 2021.1.x:** (Skip if you previously performed this task.)

If you installed iTPM before November 2021:

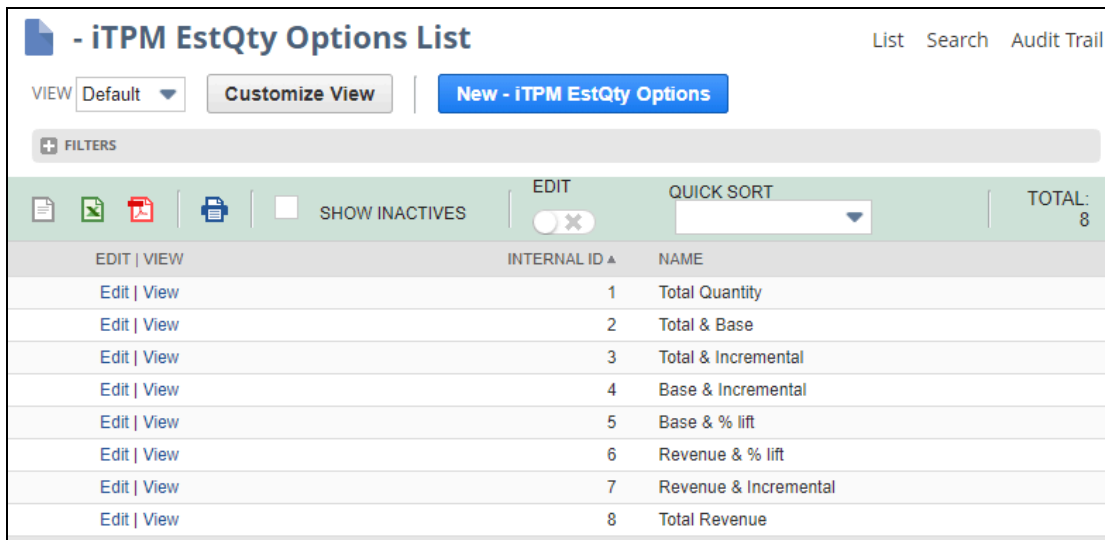
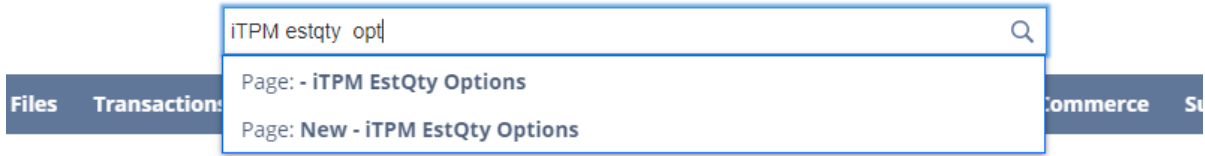
- Confirm these records are in your "- iTPM Accrual Event Type" Custom list
- Go to *Customization -> Lists, Records & Fields -> Lists*
- If missing, contact CG Squared to add these records by CSV import if your list is locked.
- NOTE: You may need to make the Settlement ID=6 record ACTIVE.
- Contact iTPM support if your records are locked.



INACTIVE		EDIT VIEW	INTERNAL ID ▲	NAME
<input type="checkbox"/>		Edit View	1	Transaction
<input type="checkbox"/>		Edit View	2	New Promotion-LS
<input type="checkbox"/>		Edit View	3	Promotion Edited-BB
<input type="checkbox"/>		Edit View	4	Promotion Closed
<input type="checkbox"/>		Edit View	5	Promotion Re-Opened
<input type="checkbox"/>		Edit View	6	Settlement
<input type="checkbox"/>		Edit View	7	Manual Adjustment
<input type="checkbox"/>		Edit View	8	Overpay - Lump Sum
<input type="checkbox"/>		Edit View	9	Overpay - Bill Back
<input type="checkbox"/>		Edit View	10	Correct/Adjustment
<input type="checkbox"/>		Edit View	11	Promotion Voided
<input type="checkbox"/>		Edit View	12	New Promotion-BB
<input type="checkbox"/>		Edit View	13	Promotion Edited-LS
<input type="checkbox"/>		Edit View	14	Period-Based

If updating from iTPM 2021.x.x: (Skip if you previously performed this task.)

If you installed iTPM before January 2022, and use the promotion planning module, enter "- iTPM EstQty Options" in your global search:



EDIT VIEW	INTERNAL ID ▲	NAME
Edit View	1	Total Quantity
Edit View	2	Total & Base
Edit View	3	Total & Incremental
Edit View	4	Base & Incremental
Edit View	5	Base & % lift
Edit View	6	Revenue & % lift
Edit View	7	Revenue & Incremental
Edit View	8	Total Revenue

You may need to add these records.

Contact your iTPM support team to perform this task. Because this list is locked, these will need to be added by CSV import.

- Add Revenue & % lift ID=6
- Add Revenue & Incremental ID=7
- Add Total Revenue ID=8

If updating from **iTPM 2021.x.x**: (**Skip** if you previously performed this task.)


If you installed iTPM before January 2022, if you have a role that says "Role needs permission to manage periods" to delete the deduction, then make this change: (**Suitelet**)

Script Deployment

← → List Search

Save ▼ | **Cancel** | **Change ID** | **Actions** ▼

SCRIPT
- iTPM - Delete Record

TITLE *
- iTPM - Delete Record 

ID
customdeploy_itpm_delete_record
 DEPLOYED

STATUS *
Released ▼

EVENT TYPE
▼

LOG LEVEL
Error ▼

EXECUTE AS ROLE
Administrator ▼

AVAILABLE WITHOUT LOGIN

URL
/app/site/hosting/scriptlet.nl?script=1119&deploy=1

If updating from **iTPM 21.x.x**: (**Skip** if you previously performed this task.)

If you installed iTPM before January 2022, and you want to use [iTPM reason codes in your credit memos](#), confirm the iTPM reason code field is applied to the lines of the credit memo form that you'll use to create iTPM deductions.

Task: If you use Period Accruals, this is an important task. Review the parameters in each of these scripts!
Make sure the **parameters** in step 15c in the Admin User Guide are populated correctly.

- User Event Script: - iTPM UE Period Based Accruals
- Suitelet: - iTPM SU Period Based Accruals
- Map Reduce Script: - iTPM MR Period Based Transaction

Task: If you use the "Related Promotions" feature, be sure to review and populate the parameters in the "- iTPM SU Related Promotions" and "- iTPM Deduction Promotion List" scripts. **(Suitelet)**

The screenshot shows the 'Script Deployment' interface for the script '- iTPM SU Related Promotions'. The script is in a 'Released' status. The title is '- iTPM SU Related Promotions' and the ID is 'customdeploy_itpm_su_relatedproms'. It is marked as 'DEPLOYED'. The log level is 'Error'. The 'EXECUTE AS ROLE' is 'Current Role', and the 'AVAILABLE WITHOUT LOGIN' checkbox is unchecked. The URL is '/app/site/hosting/scriptlet.nl?script=7042&deploy=1'. The parameters section shows 'CUSTOMER ATTRIBUTE' with the value 'employee' and 'CUSTOMER ATTRIBUTE FIELDID ON CUSTOMER RECORD' with the value 'salesrep'. Navigation tabs include Audience, Links, Parameters, Execution Log, and System Notes.

The screenshot shows the 'Script Deployment' interface for the script '- iTPM - Deduction Promotion List'. The script is in a 'Released' status. The title is '- iTPM - Deduction Promotion List' and the ID is 'customdeploy_itpm_set_promotionlist'. It is marked as 'DEPLOYED'. The log level is 'Error'. The 'EXECUTE AS ROLE' is 'Current Role', and the 'AVAILABLE WITHOUT LOGIN' checkbox is unchecked. The URL is '/app/site/hosting/scriptlet.nl?script=1849&deploy=1'. The parameters section shows '- iTPM CUSTOMER ATTRIBUTE' with the value 'salesrep' and an unchecked checkbox for 'INCLUDE MATCHING PROMOTIONS ACROSS ALL SUBSIDIARIES'. Navigation tabs include Audience, Links, Parameters, Execution Log, and System Notes.

NOTE: The "Include Matching Promotions Across all Subsidiaries" is a configuration option that you can check to match deductions from one subsidiary to promotions in another subsidiary.

Task: The default is to assign newly created deductions to the user that creates them. If you changed this default, after the iTPM update you may need to re-check the parameter in these two scripts (**User Event**):

- iTPM - Deduction Buttons and - iTPM - Invoice Deduction Buttons

When these checkboxes are checked, deductions will be auto-assigned to the sales rep that's stored in the deduction customer. If there is no sales rep, then the deduction will be assigned to the person creating the deduction.

Script Deployment

[Edit](#) [Back](#) | [Actions](#) ▾

SCRIPT	- iTPM - Invoice Deduction Buttons	STATUS	Released
APPLIES TO	Invoice	EVENT TYPE	
ID	customdeploy_itpm_invoice_ddnbuttons	LOG LEVEL	Error
<input checked="" type="checkbox"/> DEPLOYED		EXECUTE AS ROLE	Current Role

[Audience](#) • [Scripts](#) • [Parameters](#) • [Context Filtering](#) • [Execution Log](#) • [System Notes](#)

- iTPM DEDUCTION PERMISSION	<input type="checkbox"/> - iTPM DEDUCTION ASSIGNTO TO SALESREP
- iTPM Deductions Permission	
- iTPM DEDUCTION RECORD TYPE ID	
- iTPM Deduction	

Script Deployment

[Edit](#) [Back](#) | [Actions](#) ▾

SCRIPT	- iTPM - Deduction Buttons	STATUS	Released
APPLIES TO	- iTPM Deduction	EVENT TYPE	
ID	customdeploy_itpm_ddn_buttons	LOG LEVEL	Error
<input checked="" type="checkbox"/> DEPLOYED		EXECUTE AS ROLE	Current Role

[Audience](#) • [Scripts](#) • [Parameters](#) • [Context Filtering](#) • [Execution Log](#) • [System Notes](#)

UE_DDN_CLIENT SCRIPT PATH	- iTPM DEDUCTION APPROVAL BY SALES REC TYPE ID
./iTPM_Attach_Deduction_Buttons.js	- iTPM Deduction Approval by Sales
- iTPM SETTLEMENT PERMISSION REC TYPE ID	- iTPM DEDUCTIONS DELETE PERMISSION REC TYPE ID
- iTPM Settlements Permission	- iTPM Deductions Delete Permission
- iTPM DEDUCTION PERMISSION REC TYPE ID	- iTPM DEDUCTIONS CHANGE CUSTOMER PERMISSION REC TYPE ID
- iTPM Deductions Permission	- iTPM Deductions Change Cust Permission
- iTPM DEDUCTION SPLIT REC TYPE ID	<input type="checkbox"/> - iTPM DEDUCTION ASSIGN TO CUSTOMER SALES REP WHEN CREATED
- iTPM Deduction Split	
- iTPM EXPENSE QUEUE REC TYPE ID	
- iTPM Expense Queue	

Script Deployment

[Edit](#) [Back](#) | [Actions](#) ▾

SCRIPT - iTPM - Invoice Deduction Buttons	STATUS Released
APPLIES TO Credit Memo	EVENT TYPE
ID customdeploy_itpm_creditmemo_ddnbuttons	LOG LEVEL Error
<input checked="" type="checkbox"/> DEPLOYED	EXECUTE AS ROLE Current Role

[Audience](#) • [Scripts](#) • [Parameters](#) • [Context Filtering](#) • [Execution Log](#) • [System Notes](#)

- iTPM DEDUCTION PERMISSION - iTPM Deductions Permission
 - iTPM DEDUCTION RECORD TYPE ID - iTPM Deduction
 - iTPM DEDUCTION ASSIGN TO CUSTOMER SALES REP WHEN CREATED

Task: If you changed the default parameter in '- iTPM - MR Deduction Split Process ', then make sure it is still checked after updating iTPM.: (MR script)

Script Deployment

[Edit](#) [Back](#) | [Actions](#) ▾

SCRIPT - iTPM - MR Deduction Split Process	STATUS Scheduled
TITLE - iTPM - MR Deduction Split Process	SEE INSTANCES Status Page
ID customdeploy_itpm_mr_ddn_splitprocess	LOG LEVEL Error
<input checked="" type="checkbox"/> DEPLOYED	EXECUTE AS ROLE Administrator
	PRIORITY Standard
	CONCURRENCY LIMIT 1
	<input type="checkbox"/> SUBMIT ALL STAGES AT ONCE
	YIELD AFTER MINUTES 10
	BUFFER SIZE 1

[Schedule](#) • [Parameters](#) • [Execution Log](#) • [System Notes](#)

NEW DEDUCTIONS ALWAYS HAVE A CURRENT DATE

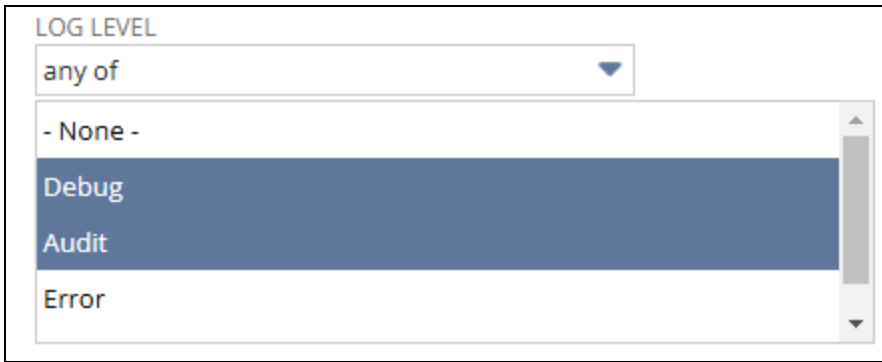
Note: If you customized any of the iTPM scripts, make sure the log level is set to ERROR: (Optional)

Search for scripts that may be incorrectly set to DEBUG log level.

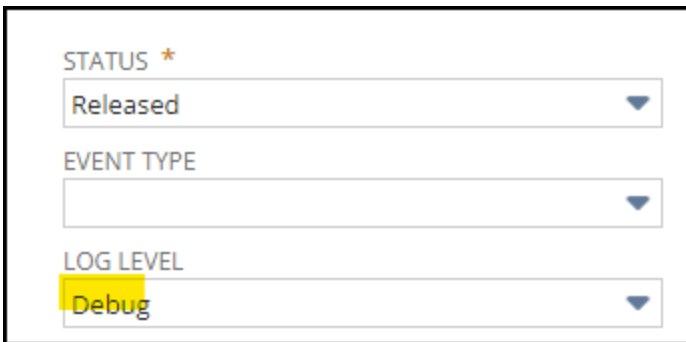
1. View any script
2. Click on SEARCH in the upper right corner:



3. Search for scripts that have the log level = Debug or Audit



4. EDIT the scripts and change to ERROR log.



2.7 Suggested Sandbox Testing

We recommend clients that have sandboxes test iTPM before updating their production account.



Note: If you installed the iTPM managed bundle, your user ID cannot be used for role-based testing. As the implementer, your ID may show workflow buttons that should not be visible based on the role you are testing. **Role-based testing should be done with user IDs that have not installed or updated the iTPM managed bundle.**



IMPORTANT: Install iTPM in your SANDBOX account for testing BEFORE installing in your live production account. While iTPM is easy to install, and requires a minimum amount of effort to configure, **trade promotion has a material impact on your company's financial statements.** We recommend sandbox testing prior to go-live in production.



Important: You, as iTPM administrator, are responsible for setting up any new preferences, NetSuite settings, and performing any other tasks that are required by this updated version of iTPM. Be sure to read ALL of the tasks in this chapter before you begin testing iTPM in your sandbox.



Important: Your organization is responsible for configuring the GL-account for open deductions and other iTPM financial configurations. Always create and resolve deductions in your sandbox before implementing them in production. Run financial reports to confirm the financial impact is correct and acceptable to your organization. **It is possible to incorrectly configure the open deduction GL account, reason codes, promotion types, etc. in a way that creates 'bad data'.** You are responsible for confirming the GL impact of your iTPM configurations.



Helpful hints for testing in Release Preview Accounts: Scheduled scripts do not run in release preview accounts. To run iTPM scheduled scripts manually, go to section 6.9 in the Admin User Guide.

2.8 Schedule iTPM scripts After a Sandbox Refresh

As a NetSuite administrator, you have the ability to schedule map-reduce scripts.

In NetSuite 2023.1 and newer, a sandbox refresh changes all scheduled scripts to **UNSCHEDULED**.

All of the iTPM features that work by scheduled script will stop working after a sandbox refresh.

Here are examples of what will NOT work until you re-schedule iTPM scripts:

- Split, CSV Split
- Expense, Mass-Expense
- Actions->Copy of a promotion
- Mass Copy of Promotions
- Mass Non-GL Update
- Applying and Removing off-invoice discounts to sales orders
- Allocating items in a settlement
- Create promotions from plans
- ... and more

- [These are the typical iTPM SCHEDULED scripts:](#)
- These are steps to re-schedule iTPM scripts after your sandbox refresh:
 1. Login to production to get a list of scheduled scripts in production
 2. To view these scheduled scripts:
 - Go to **Customization -> Scripting -> Script Deployments**,
 - set the *TYPE* filter to *Map/Reduce*, and
 - Status to *Scheduled*.
 - Sort the list on script NAME so the iTPM scripts sort to the top.
 - Print or save the list
 3. Login in your sandbox.
 4. To view MR Unscheduled scripts:
 - Go to **Customization -> Scripting -> Script Deployments**,
 - Set the *TYPE* filter to *Map/Reduce*, and
 - Status to UNSCHEDULED.
 - Sort the list on script NAME so the iTPM scripts sort to the top.
 - For each scheduled script in production:
 - EDIT each UNSCHEDULED script in your sandbox that should be scheduled.
 - Change the script to SCHEDULED, and
 - SAVE.

3.0 Support

3.1 Troubleshooting

Email your issues to support@cgsquared.com.

Please include the following in your email to iTPM support:

- Your name, your NetSuite role, and the sandbox or account with the issue.
- Describe the issue.
- If appropriate, describe the steps or actions that led up to the issue.
- Add screenshots if possible.
- Give us contact information, along with your current timezone.
- Replies to support emails do NOT create new support tickets, they just add to the email thread.

3.2 Contacting Support

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

How to get Help!	Description
Online documentation	Use www.i-tpm.com/admin-training-resources for User Guide PDFs and Training videos. Documentation also available at: www.i-TPM.com/planning-resources www.i-TPM.com/deduction-management www.i-TPM.com/apply-off-invoice www.i-TPM.com/analytics www.i-TPM.com/annual-planning www.i-TPM.com/accruals www.i-TPM.com/see-what-is-new-in-iTPM
Email	Just email your question or issue to support@cgsquared.com .

4.0 Terms and Conditions

4.1 NetSuite Disclaimer

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4.2 iTPM Terms and Conditions

By installing the iTPM managed bundle, you accept your **iTPM Acceptance Form Agreement** entered into between the purchasing company (“**Customer**”) and CG Squared, Inc. (**CG²**), and agree to be bound by the **iTPM License Agreement**, www.i-TPM.com/professional-services-agreement, incorporated as **Exhibit A**, and the **Professional Services Agreement**, www.i-TPM.com/professional-services-agreement, incorporated as **Exhibit B**.

