

Integrated Trade Promotion Management

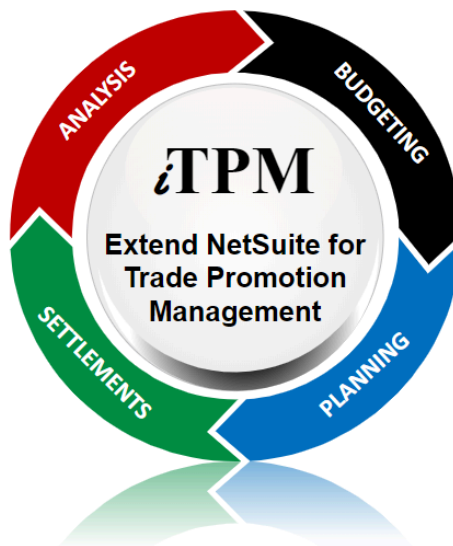


iTPM Admin Release & Install Notes

Version **25.1.2** Update

May 2025

Revised May 10, 2025



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Quick Reference: UPDATE iTPM to version 25.1.2

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 25.1.2 before iTPM 25.2.1 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 25.1.2 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 25.1.2. 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 **25.1.2**

The following changes were made to iTPM 25.1.1 and are included in iTPM version 25.1.2.

- iTPM 25.1.1 was tested with NetSuite 2025.1, and recertified as Build-for-NetSuite
- This list begins with Agile Development iteration #361 through #372
- **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:

Republish iTPM 25.1.1 to include fixes to defects: S-05567

Iteration 366

- **S-05634: Allow users to enter either the deduction # or the full deduction external ID for CSV Bulk Settlements.**
- **S-05641: Change the Bulk Settlement validation from equal to the deduction open amount, to less than or equal to.**
- S-05603: GST-18: To support GST, develop: If a taxable settlement is voided, then auto-UNDO the related JE for tax. This is a direct reversal of the original tax JE in real time.
- S-05651: GST-18: To support GST, design: If a taxable settlement is voided, and the GST JE is still in the expense queue, give the user a warning and prevent the settlement from being voided.
- **S-05550: Create a new parameter option to choose a different 'ship date' field name for applying iTPM Discounts. (See also S-05506)**
- S-05625: Option to skip KPI processing in promotion types if the other reference code in the promotion type has this text: SKIP KPI processing.

Iteration 367

- S-05657: If the 'owner' in the Bulk Settlement record is "- system" which is invalid, set the field to blank. (See also S-05632)
- S-05650: Design how to populate department in period accruals using department from the item record.
- S-05669: Populate department in the lines of period accruals using department from the item. [See also S-05660)

Iteration 368

- D-01687: iTPM does not correctly update the deduction open balance and status when the user changes the iTPM JE resolution and it has more than one credit lines.
- S-05672: Design for Mass CSV Settlement Void (for future story)
- S-05426: GST-17: Support for GST: Create a formula in new saved searches for taxes: "iTPM Settlement

w/GST (sans adjustment / voiding)"

- S-05680: DA-02: Design Daily Event Accruals (...with support for weekly and monthly event accruals.)
- S-05686: GST-17b: To support GST: Add saved search for taxes to the iTPM menu for Accounting and Classic centers: iTPM -> Settlements - Tax by Settlement
- S-05684: MSC-01: Mass Status Change: Create new role permission "- iTPM Mass Status Change Promo".
- S-06693: MSC-01c: Mass Status Change: Add "- iTPM Mass Status Change Promo" role permission to some standard iTPM roles.
- S-06695: DA-04: Daily E-Accruals: Add a new field to accrual record, % of days completed.
- S-06696: DA-05: Daily E-Accruals: Add a new Event Trigger to support Daily accruals, internal ID=15.
- S-05690: Add two new fields to the Resolution Queue to support a future feature, 'Mass Settlement Void'
- S-06711: Add promotion owner and ship dates as new columns in the iTPM promotional reminders

Iteration 369

- **S-006697: DA-06, Daily E-Accruals, Redesign and develop a new script for daily event accruals. This can also be used for weekly and monthly accruals.**
- S-05632: Bulk CSV Settlement should populate the 'requested by' field in the settlement using the 'owner' of the settlement request queue record owner.
- **S-06704: MSC-03, Mass Status Change: Add more filters, including promotion condition, other reference code and promotion name with wildcard search.**

Iteration 370

- S-06740: MSC-03b: Add "Other reference code" to the Mass Status Change result set.
- S-05578: GST-40: If the user role does not have access to the tax rate, prevent iTPM from creating 'bad' data.
- S-06737: Now that Summary KPIs are updated at the same time as item KPIs, do not show the "Summary KPIs are being updated" banner.
- S-06742: DA-06c: Populate the "% of days completed" field in the Daily Event Accrual record.
- S-06739: DA-06b: Design: Daily Event Accrual should have all items in one accrual record, and populate department in the accrual lines.
- D-01692: Approved promotions sometimes get stuck while applying approved changes.
- S-06763: Add item as a column to the "Promotion Changes Pending" reminder.
- S-06768: Department in iTPM Accruals must be moved to the lines.
- S-06754: DA-06c: Daily Event accruals should have all items in one accrual record, and populate department in the accrual lines.
- S-06723: Optimized scripts for updating promotion KPIs. Several MR scripts are replaced with new

optimized scripts. Summary KPIs are not updated at the same time that the item KPIs are finalized.

Iteration 370

- **S-06749: MSC-05: Add validations to Mass Status Change when moving a promotion to APPROVED status.**
- S-06772: Make the "- iTPM Retail Event Information" custom record available in the NetSuite Dataset list. [See also iData]
- S-06781: The GL for negative daily accruals need to be reversed from the debit/credit configuration.
- S-06734: Design how transaction accruals can be created for backdated promotions.
- S-06755: MSC-00: Redesign Mass Status Change to support more than 125 promotions at one time.
- S-06800: Change the accrual script name: Change 'accruals' to 'Accruals'.
- S-06779: Daily Allocated Event accruals should default department based on the value in the item record.

Iteration 372

- **S-06789: MST-12c Change the yellow banner for the Mass Status change new form from 125 to 500 promotion.**
- D-01694: Change the Event-Accrual transaction saved search from 'date last modified' to transaction date in Dev 2.
- S-06793: Make the Mass Status change script work with up to 500 promotions at one time.
- S-06803: Change the SPLIT form to allow only 1 deduction.
- S-06791: MSC-12e: Change the text in the Mass Status Change processing notes.
- S-06790: MSC-12d: Rename the mass status change script to "- iTPM - MR Prom Status Mass Change"
- S-06816: Dev 2: Change the NBOI script to use the native NetSuite Subtotal, internal ID = -2. (Same change as in S-06817 and S-06805]
- S-05653: GST-33d Design / Develop: Bulk Settlement upload: Populate iTPM Applied to with other transaction types for Settlement Adjustments.
- **S-06748: MSC-06: Add Validation to Mass Status change from Approved to other statuses. (Critical validation)**
- S-06798: Develop: Create e-accruals for backdated promotions.
- **S-06819: Put the Bulk Settlement support for partial resolutions into Dev 2 for publishing: See also S-05641.**

Publish iTPM version 25.1.2 (S-05633)

- Iteration 373
- Development continues...

1.2 Upcoming changes



You may be required to update to 25.1.x before iTPM version 25.2.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*
25.1.x	Minor updates as needed. iTPM 25.1.x will be minor releases to fix critical bugs, and the addition of critical features requested by clients.
25.2.x	Summer 2025 Major release with significant enhancements After iTPM 25.2.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**.
- Email support@cgsquared.com for help configuring iTPM for broker access.

The screenshot shows the 'Saved - iTPM Promotion Search' interface. The search title is '- iTPM Partner Promotion List'. The ID is 'customsearch_js_itpm_partnerpromotions'. The owner is 'Ring, Alex'. The search is public and available as a list view. The criteria tab is selected, showing a filter for 'Customer : Broker/Partner' and a description 'Is any of me, my team'. The interface includes buttons for Save, Reset, Cancel, Preview, New Template, Change ID, and Actions. There are also checkboxes for 'AVAILABLE AS DASHBOARD VIEW', 'AVAILABLE AS SUBLIST VIEW', 'AVAILABLE FOR REMINDERS', and 'SHOW IN MENU'. The criteria section has a 'USE EXPRESSIONS' checkbox and a 'Standard' summary section with a filter and description field.



IMPORTANT: The "- iTPM Broker (Adv. Partner Center, only Planning)" role is recognized by NetSuite as using the less expensive NetSuite Advanced Partner Center role. However, this role can not be completely locked down.

The "- iTPM Broker Partner (Custom center)" role has the same iTPM functionality, and with the custom center it prevents brokers from access beyond iTPM promotion planning. Although this custom center role has less functionality, from a license perspective, NetSuite considers it a full NetSuite user license. Contact your CG Squared and NetSuite representative for financial considerations.

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 **25.1.2**.

iTPM Bundle Details	Release 25.1.2
Design, development, testing and publishing	February 2025 - May 2025
Bundle release date	Latest release is May 2025
Publisher ID	44277 CG Squared, Inc.
Bundle ID	Bundle # 312604
NetSuite Built-for-NetSuite review?	iTPM 25.1.1 was tested with Netsuite 2025.1 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.com 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 in 25.1.2)

If you only use the **deduction module**, only schedule the 7 scripts in the green boxes below:

ID	SCRIPT ▲	API VERSION	TYPE
customdeploy_itpm_promodeal_cpy	- iTPM - Copy Promotion	2.0	Map/Reduce
customdeploy_itpm_ddn_splitsvtaskimport	- iTPM - Deduction Split CSV Import Task	2.0	Scheduled
customdeploy_itpm_mr_allconbrtnfordraft	- iTPM - MR All ContributionForDraft(SC)	2.1	Map/Reduce
customdeploy_itpm_mr_allocationconbrtn	- iTPM - MR Allocation Contribution(SC)	2.1	Map/Reduce
customdeploy_itpm_mr_apply_detached_inv	- iTPM - MR Apply Detached Invoice	2.0	Map/Reduce
customdeploy_itpm_mr_ddn_splitprocess	- iTPM - MR Deduction Split Process	2.0	Map/Reduce
customdeploy_itpm_mr_ddn_writeoff	- iTPM - MR Deduction Write-Off(Sc)	2.0	Map/Reduce
customdeploy_itpm_mr_delete_period_share	- iTPM - MR Delete Period Share Records	2.0	Map/Reduce
customdeploy_itpm_mr_delete_processplan	- iTPM - MR Inactive Related Records(Sc)	2.0	Map/Reduce
customdeploy_itpm_mr_inactive_relatedrec	- iTPM - MR Inactive Related Records(Sc)	2.0	Map/Reduce
customdeploy_itpm_mr_nboi_rem_discounts	- iTPM - MR NBOI Processing	2.0	Map/Reduce
customdeploy_itpm_mr_nongl_mass_update	- iTPM - MR Non GL Mass Update	2.0	Map/Reduce
customdeploy_itpm_mr_promo_period_share	- iTPM - MR Promotion Period Share	2.0	Map/Reduce
customdeploy_itpm_mr_schedule_kpi_queue	- iTPM - MR Schedule KPI Queue	2.0	Map/Reduce
customdeploy_itpm_mr_settlementlines	- iTPM - MR Settlement Lines	2.0	Map/Reduce
customdeploy_itpm_update_item_period	- iTPM - MR Update By Item Period Share	2.0	Map/Reduce
customdeploy_itpm_delete_promotion_recor	- iTPM Delete Promotion Record	2.0	Map/Reduce
customdeploy_itpm_mr_allow_new_item_grp	- iTPM MR Allowance for New Item(Sc)	2.0	Map/Reduce
customdeploy_itpm_mr_bulk_settlement_pro	- iTPM MR Bulk Settlement Process	2.0	Map/Reduce
customdeploy_itpm_mr_kpi_deletequeuerec	- iTPM MR Delete KPI Queue Records	2.0	Map/Reduce
customdeploy_itpm_mr_overnight_proplan	- iTPM MR Overnight Process Plan	2.0	Map/Reduce
customdeploy_itpm_mr_sc_rel_ddn_update	- iTPM MR SC Related Deduction Updation	2.0	Map/Reduce
customdeploy_itpm_update_pr_period_share	- iTPM MR Update Promotion Period Share	2.0	Map/Reduce
customdeploy_itpm_promolinked_approved	- iTPM PromoLinked Records for approved	2.0	Map/Reduce

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 or 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	- iTPM MR Allowance for New Item (Sc) ----->	- iTPM MR Overnight Allowances sold
Allowances & KPIs	- iTPM MR Overnight Process Plan ----->	- 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 OPT KPI Calculations MR with deployment for draft, edit and scheduled - iTPM OPT KPI Calculations MR with deployment for approved, edit & scheduled
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?"

Transaction Line Fields					
<div>New</div> <div>+ FILTERS</div>					
<div> </div>					
#	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

Transaction Line Field	
Apply to Forms	Actions ▼
<div>LABEL</div> <div>iTPM Discounts Applied?</div> <div>ID</div> <div>custcol_itpm_discounts_applied</div>	

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

Items • Expenses •		
Mark All	Unmark All	Reset Labels
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**

The screenshot shows the 'Script' configuration page. At the top, there are buttons for 'Edit', 'Back', 'Deploy Script', and an 'Actions' dropdown. The script details are as follows:

TYPE	DESCRIPTION
User Event	Apply or ReApply discounts button on Sales order

NAME	OWNER
- iTPM Button on Sales order	Priyanka Balusu

ID: customscript_itpm_btn_on_salesorder

API VERSION: 2.0

There is an 'INACTIVE' checkbox which is currently unchecked.

Below the details are tabs for 'Scripts', 'Parameters', 'Unhandled Errors', 'Execution Log', 'Deployments', and 'System Notes'. The 'Scripts' tab is active, showing the script file 'preview iTPM_Button_on_Salesorders.js' with 'download' and 'Edit' links. Three checkboxes are checked: 'BEFORE LOAD FUNCTION', 'BEFORE SUBMIT FUNCTION', and 'AFTER SUBMIT FUNCTION'.

At the bottom, there is a 'Custom Plug-In Types' section with a table showing 'CUSTOM PLUG-IN TYPE' and a message 'No records to show.'

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

The screenshot shows the 'Script Deployment' configuration page. At the top, there are buttons for 'Edit', 'Back', and an 'Actions' dropdown. The deployment details are as follows:

SCRIPT	STATUS
- iTPM Button on Sales order	Released

APPLIES TO: Sales Order

ID: customdeploy_itpm_btn_on_salesorder

The 'DEPLOYED' checkbox is checked and highlighted in yellow.

LOG LEVEL: Error

EXECUTE AS ROLE: Administrator

Below the details are tabs for 'Audience', 'Scripts', 'Context Filtering', 'Execution Log', and 'System Notes'. The 'Audience' tab is active, showing a table with columns for 'ROLES', 'SUBSIDIARIES', and 'PARTNERS'.

ROLES	SUBSIDIARIES	PARTNERS
<input checked="" type="checkbox"/> ALL ROLES	<input type="checkbox"/> ALL EMPLOYEES	<input type="checkbox"/> ALL PARTNERS
DEPARTMENTS	GROUPS	
	EMPLOYEES	

At the bottom, there are buttons for 'Edit', 'Back', and an 'Actions' dropdown.

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	STATUS
- iTPM SU SO EDI Report	Released
TITLE	EVENT TYPE
- iTPM SU SO EDI Report	
ID	LOG LEVEL
customdeploy_itpm_su_so_edi_report	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:

Tabs Screen Fields Actions Sublists Sublist Fields Printing Fields Custom Code Roles Linked Forms History							
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.
iTPM uses the Native Subtotal, ID = -2



***Note:** iTPM assumes the only subtotal on the sales order is the last row. Header discounts will not include all items in the sales order if you have subtotals in the body of the sales order.

2.3 D. Task #6 What field to use in the sales order for "Requested Ship Date"?

SKIP this task if you want to use the default field to apply discounts based on ship dates... or if you only use transaction dates for applying discounts.

iTPM by default uses the field *shipdate* in the sales order. (Red box below)

If you have a different field in the sales order that you need to use to determine what discounts overlap the sales order, see the configurations. (Blue box below... with a different field name... Example: *custbody_sps_date_002*)

Items	Shipping	Billing	Relationships	Communication	Related Records	System Information
Shipping Information				Pick Up Appointment		
SHIPPING CARRIER UPS				ESTIMATED SHIP DATE 2/17/2025		
SHIPPING METHOD				PICK UP APPOINTMENT TIME 10:00 am		
SHIPPING COST				<input checked="" type="checkbox"/> APPOINTMENT CONFIRMED		
<input type="checkbox"/> SHIP COMPLETE				Delivery		
SHIPPING TAX CODE				REQUESTED DELIVERY DATE 2/18/2025		
SHIPPING TAX RATE				REQUESTED DELIVERY TIME 10:00 am		

Map Reduce script:

Script Deployment

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

SCRIPT
- iTPM - MR NBOI Processing

TITLE
- iTPM - MR NBOI Processing

ID
customdeploy_itpm_mr_nboi_processing

☒ DEPLOYED

STATUS
Not Scheduled

SEE INSTANCES
[Status Page](#)

LOG LEVEL
Error

EXECUTE AS ROLE
Administrator

PRIORITY
Standard

CONCURRENCY LIMIT
2

☐ SUBMIT ALL STAGES AT ONCE

YIELD AFTER MINUTES
15

BUFFER SIZE
1

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

☐ RATE IN 4 DECIMALS
☐ ONLY PROCESSING EXCEPTIONS?

- iTPM SHIP DATE FIELD INTERNAL ID

Leave this field blank to default to *SHIPDATE*.

Script Deployment

[←](#) [→](#) [List](#)

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

SCRIPT

- iTPM SU SO EDI Report

TITLE

- iTPM SU SO EDI Report

ID

customdeploy_itpm_su_so_edi_report

☒ DEPLOYED

STATUS

Released

EVENT TYPE

LOG LEVEL

Error

EXECUTE AS ROLE

Current Role

☐ AVAILABLE WITHOUT LOGIN

URL

/app/site/hosting/scriptlet.nl?script=1944&deploy=1

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

- iTPM EDI UOM FIELD INTERNAL ID

- iTPM SHIP DATE FIELD INTERNAL ID

- iTPM EDI PRICE FIELD INTERNAL ID
custcolreq_price

User Event Script:

Script Deployment

[←](#) [→](#) [List](#) [Search](#)

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

SCRIPT

- iTPM - NBOI Processing

APPLIES TO

Sales Order

ID

customdeploy_itpm_so_nboi_processing

☒ DEPLOYED

STATUS

Released

EVENT TYPE

LOG LEVEL

Error

EXECUTE AS ROLE

Current Role

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

- iTPM SHIP DATE FIELD INTERNAL ID

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

If you change any of the default iTPM script parameters, be sure to document your changes.

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> - iTPM Deduction Do not change assign-to on split 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

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: 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 - iTPM Ship Date field Internal ID Default is BLANK	MR
- iTPM - MR NBOI Processing	Rate in 4 decimals: Default is UNCHECKED Only Process Exceptions? Default is UNCHECKED - iTPM Ship Date field Internal ID Default is BLANK	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 - iTPM Ship Date field Internal ID Default is BLANK	Suitelet
- iTPM - MR NBOI Processing	- iTPM Ship Date field Internal ID Default is BLANK	User Event

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)

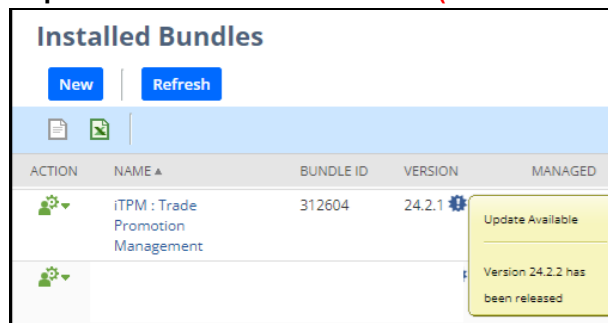
Updating a NetSuite Managed Bundle should generally follow the standard NetSuite updating steps.

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)**



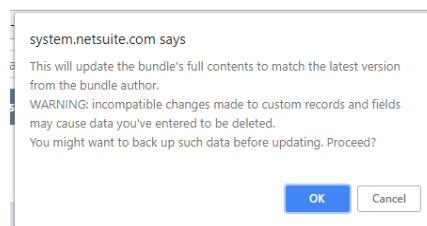
7. Follow the NetSuite update steps.

- 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.

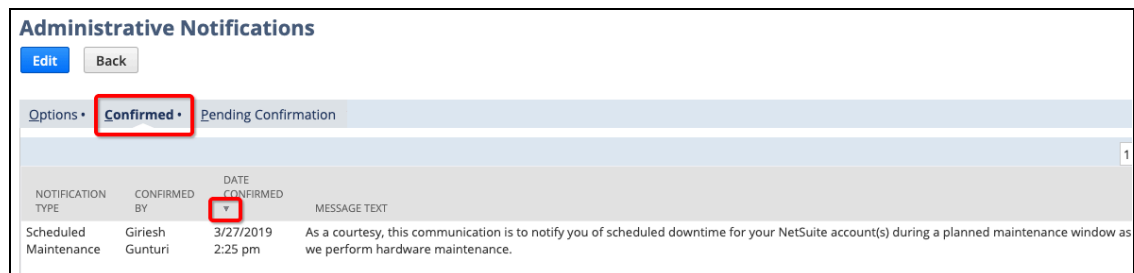
Step 1: Contact CG Squared to schedule the update to iTPM in production.

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 scripts in the green boxes below:

ID	SCRIPT ▲	API VERSION	TYPE
<code>customdeploy_itpm_promodeal_cpy</code>	- iTPM - Copy Promotion	2.0	Map/Reduce
<code>customdeploy_itpm_ddn_splitcsvtaskimport</code>	- iTPM - Deduction Split CSV Import Task	2.0	Scheduled
<code>customdeploy_itpm_mr_allconbrtnfordraft</code>	- iTPM - MR All ContributionForDraft(SC)	2.1	Map/Reduce
<code>customdeploy_itpm_mr_allocationconbrtn</code>	- iTPM - MR Allocation Contribution(SC)	2.1	Map/Reduce
<code>customdeploy_itpm_mr_apply_detachedc_inv</code>	- iTPM - MR Apply Detached Invoice	2.0	Map/Reduce
<code>customdeploy_itpm_mr_ddn_splitprocess</code>	- iTPM - MR Deduction Split Process	2.0	Map/Reduce
<code>customdeploy_itpm_mr_ddn_writeoff</code>	- iTPM - MR Deduction Write-Off(Sc)	2.0	Map/Reduce
<code>customdeploy_itpm_mr_delete_period_share</code>	- iTPM - MR Delete Period Share Records	2.0	Map/Reduce
<code>customdeploy_itpm_mr_delete_processplan</code>	- iTPM - MR Inactive Related Records(Sc)	2.0	Map/Reduce
<code>customdeploy_itpm_mr_inactive_relatedrec</code>	- iTPM - MR Inactive Related Records(Sc)	2.0	Map/Reduce
<code>customdeploy_itpm_mr_nboi_rem_discounts</code>	- iTPM - MR NBOI Processing	2.0	Map/Reduce
<code>customdeploy_itpm_mr_nongl_mass_update</code>	- iTPM - MR Non GL Mass Update	2.0	Map/Reduce
<code>customdeploy_itpm_mr_promo_period_share</code>	- iTPM - MR Promotion Period Share	2.0	Map/Reduce
<code>customdeploy_itpm_mr_schedule_kpi_queue</code>	- iTPM - MR Schedule KPI Queue	2.0	Map/Reduce
<code>customdeploy_itpm_mr_settlementlines</code>	- iTPM - MR Settlement Lines	2.0	Map/Reduce
<code>customdeploy_itpm_update_item_period</code>	- iTPM - MR Update By Item Period Share	2.0	Map/Reduce
<code>customdeploy_itpm_delete_promotion_recor</code>	- iTPM Delete Promotion Record	2.0	Map/Reduce
<code>customdeploy_itpm_mr_allow_new_item_grp</code>	- iTPM MR Allowance for New Item(Sc)	2.0	Map/Reduce
<code>customdeploy_itpm_mr_bulk_settlement_pro</code>	- iTPM MR Bulk Settlement Process	2.0	Map/Reduce
<code>customdeploy_itpm_mr_kpi_deletequeueerec</code>	- iTPM MR Delete KPI Queue Records	2.0	Map/Reduce
<code>customdeploy_itpm_mr_overnight_proplan</code>	- iTPM MR Overnight Process Plan	2.0	Map/Reduce
<code>customdeploy_itpm_mr_sc_rel_ddn_update</code>	- iTPM MR SC Related Deduction Updation	2.0	Map/Reduce
<code>customdeploy_itpm_update_pr_period_share</code>	- iTPM MR Update Promotion Period Share	2.0	Map/Reduce
<code>customdeploy_itpm_promolinked_approved</code>	- iTPM PromoLinked Records for approved	2.0	Map/Reduce

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 25.1.2: May 2025

iTPM KPI map reduce scripts are now optimized for speed and scalability.

When you reviewed your scheduled scripts, you already un-scheduled some of these deprecated KPI scripts.

The following scripts are optimized:

INTERNAL ID	EDIT VIEW	ID	SCRIPT ▼	API VERSION	STATUS
3571	Edit View	customdeploy_opt_kpi_calc_draft_edit_mr	- iTPM OPT KPI Calculations MR	2.1	Not Scheduled
3574	Edit View	customdeploy_opt_kpi_calc_sched_mr	- iTPM OPT KPI Calculations MR	2.1	Not Scheduled
3570	Edit View	customdeploy_opt_kpi_calc_edit_mr	- iTPM OPT KPI Calculations MR	2.1	Not Scheduled

These scripts are are not used and will be deprecated in a future release:

INTERNAL ID	EDIT VIEW	ID	SCRIPT ▲
3451	Edit View	customdeploy_itpm_mr_kpi_draftpromocalc	- iTPM - MR KPI Draft Promo Calculations
3418	Edit View	customdeploy_itpm_mr_kpi_newcalschedule1	- iTPM - MR KPI New Calculations
3417	Edit View	customdeploy_itpm_mr_kpi_newcalculations	- iTPM - MR KPI New Calculations
3416	Edit View	customdeploy_itpm_mr_kpi_newcalschedule2	- iTPM - MR KPI New Calculations
3425	Edit View	customdeploy_itpm_mr_kpi_sum_field_calcs	- iTPM - MR KPI Summary Field Calcs
3424	Edit View	customdeploy_itpm_mr_kpi_sum_field_calc3	- iTPM - MR KPI Summary Field Calcs
3423	Edit View	customdeploy_itpm_mr_kpi_sum_field_calc2	- iTPM - MR KPI Summary Field Calcs

2.6 Update to **25.1.1**: February 2025

iTPM now supports deductions that include tax: If you need to use the new support for GST tax, you can configure iTPM to automatically create the GST tax journal. See section 2.17 in the *iTPM Admin User Guide* for more details.

OPTIONAL: You can skip to the [next task](#) if your deductions do not include tax.

For help configuring iTPM for GST, email support@cgsquared.com.

For example, these fields need to be available in journal entries for iTPM to process Deductions that include tax.

Tabs Field Groups Screen Fields Actions Sublists Custom Code Roles				
Main • System Information • Custom • iTPM • Lines •				
Move To Top Move To Bottom New Field				
LABEL	SHOW	MANDATORY	DISPLAY TYPE	CHECK BOX DEFAULT
⋮ Total Credit amount	<input type="checkbox"/>	<input type="checkbox"/>	Normal ▼	
⋮ Stored Credit Amount	<input type="checkbox"/>	<input type="checkbox"/>	Normal ▼	
⋮ Date Last Resolved	<input type="checkbox"/>	<input type="checkbox"/>	Normal ▼	
⋮ Date Previous Resolved	<input type="checkbox"/>	<input type="checkbox"/>	Normal ▼	
⋮ Date Reopened	<input type="checkbox"/>	<input type="checkbox"/>	Normal ▼	
⋮ Created By QuickSplit	<input type="checkbox"/>		Normal ▼	Use Field Default ▼
⋮ Taxable	<input type="checkbox"/>		Normal ▼	Use Field Default ▼
⋮ iTPM settlement tax	<input checked="" type="checkbox"/>		Disabled ▼	Use Field Default ▼
⋮ Tax For iTPM Settlement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal ▼	
⋮ Used to Create iTPM Deduction	<input checked="" type="checkbox"/>		Normal ▼	Use Field Default ▼

OPTIONAL: You can skip to the [next task](#) if your deductions do not include tax.

New parameter in the script "- iTPM - Invoice Deduction Buttons" is populated with these values below, including "- iTPM Create DDM from JE Permission" and a checkbox "Deduction button enabled on JES". The checkbox defaults to UNCHECKED. (User Event, with record type = "Credit Memo")

The screenshot shows the 'Script Deployment' page for the script '- iTPM - Invoice Deduction Buttons'. The 'APPLIES TO' field is highlighted with a red box and contains the text 'Credit Memo'. The 'ID' field contains 'customdeploy_itpm_creditmemo_ddnbuttons' and the 'DEPLOYED' checkbox is checked. The 'Parameters' tab is selected, showing a list of parameters. A red box highlights the parameters: '- iTPM CREATE DDN FROM JE PERMISSION RECORD TYPE ID', '- iTPM Create DDN from JE Permission', and a checkbox 'DEDUCTION BUTTON ENABLED ON JES' which is unchecked.

SCRIPT	STATUS
- iTPM - Invoice Deduction Buttons	Released

APPLIES TO	EVENT TYPE
Credit Memo	

ID	LOG LEVEL
customdeploy_itpm_creditmemo_ddnbuttons	Error

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					

New parameter in the script "- iTPM - Invoice Deduction Buttons" is populated with these values below, including "- iTPM Create DDM from JE Permission" and a checkbox "Deduction button enabled on JES". The checkbox defaults to UNCHECKED. (User Event, with record type = "Invoice")

The screenshot shows the 'Script Deployment' page for the script '- iTPM - Invoice Deduction Buttons'. The 'APPLIES TO' field is highlighted with a red box and contains the text 'Invoice'. The 'ID' field contains 'customdeploy_itpm_invoice_ddnbuttons' and the 'DEPLOYED' checkbox is checked. The 'Parameters' tab is selected, showing a list of parameters. A red box highlights the parameters: '- iTPM CREATE DDN FROM JE PERMISSION RECORD TYPE ID', '- iTPM Create DDN from JE Permission', and a checkbox 'DEDUCTION BUTTON ENABLED ON JES' which is unchecked.

SCRIPT	STATUS
- iTPM - Invoice Deduction Buttons	Released

APPLIES TO	EVENT TYPE
Invoice	

ID	LOG LEVEL
customdeploy_itpm_invoice_ddnbuttons	Error

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					

OPTIONAL: Skip to the [next task](#) if you do not create correcting deductions from journal entries.

New parameter in the script "- iTPM - Invoice Deduction Buttons" is populated with these values below, including "- iTPM Create DDM from JE Permission" and a checkbox "Deduction button enabled on JES". The checkbox defaults to UNCHECKED. (User Event, with record type = "Journal Entry")

Script Deployment

[←](#) [→](#) [List](#)

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SCRIPT
- iTPM - Invoice Deduction Buttons

STATUS
Released

APPLIES TO
Journal Entry

EVENT TYPE

ID
customdeploy_itpm_je_ddnbutt

LOG LEVEL
Error

☒ 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

- iTPM CREATE DDN FROM JE PERMISSION RECORD TYPE ID
- iTPM Create DDN from JE Permission

☐ DEDUCTION BUTTON ENABLED ON JES

New script called "- iTPM - Journal Entry Process". Populate the "- iTPM deductions permission rec type ID" with "- iTPM Deductions Permission". (User Event)

Script Deployment

[←](#) [→](#) [List](#)

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SCRIPT
- iTPM - Journal Entry Process

STATUS
Released

APPLIES TO
Journal Entry

EVENT TYPE

ID
customdeploy_itpm_je_process

LOG LEVEL
Error

☒ DEPLOYED

EXECUTE AS ROLE
- iTPM Support Admin.

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

- iTPM DEDUCTION PERMISSION REC TYPE ID
- iTPM Deductions Permission

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](#)

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SCRIPT
iTPM SU Item Attribute Period based

TITLE
iTPM SU Item Attribute Period based

ID
customdeploy_itpm_su_itemattribute

☒ DEPLOYED

STATUS
Released

EVENT TYPE

LOG LEVEL
Error

EXECUTE AS ROLE
Current Role

☐ 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.

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

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	Shipping	Billing	Relationships	Communication	Related Records	System Information	Custom	SPS	EFT	iTPM	Mobile App Attachments	Quality
<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"/> PROCESSING EXCEPTION												
<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, iTPM uses the native "Subtotal", ID = -2



***Note:** iTPM assumes the only subtotal on the sales order is the last row. Header discounts will not include all items in the sales order if you have subtotals in the body of the sales order.

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.

- iTPM Method of Payment List

List

Search

Audit Trail

VIEW

Default

Customize View

New - iTPM Method of Payment

+ FILTERS

EDIT

QUICK SORT

TOTAL: 6

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**, not scheduled with record type = "**iTPM Promotion**")

The screenshot shows the 'Script Deployment' window for the script 'iTPM - Promotion Processing'. The 'Edit' button is highlighted. The 'APPLIES TO' section shows 'iTPM Promotion'. The 'ID' is 'customdeploy_itpm_promo_processing'. The 'DEPLOYED' checkbox is checked. The 'STATUS' is 'Released'. The 'EVENT TYPE' is 'Error'. The 'LOG LEVEL' is 'Error'. The 'EXECUTE AS ROLE' is 'Current Role'. The 'Parameters' tab is selected, showing a list of permissions and a checkbox for 'IS PARTNER AVAILABLE IN CUSTOMER RECORD?'.

Script	Status
iTPM - Promotion Processing	Released

Applies To	Event Type
iTPM Promotion	Error

ID	Log Level
customdeploy_itpm_promo_processing	Error

Execute As Role
Current Role

Parameters
- 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
<input type="checkbox"/> 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)

The image displays two side-by-side screenshots of the 'Script Deployment' interface in NetSuite. Both screenshots show the same script: 'customdeploy_itpm_mr_estimate_accruals'. The script title is '- iTPM - MR Estimated Accruals'. The ID is 'customdeploy_itpm_mr_estimate_accruals'. The 'DEPLOYED' checkbox is checked in both. The parameter 'IS ESTIMATED QTY MODIFIED?' is checked in both. The left screenshot shows the 'DEPLOYED' checkbox as checked, while the right screenshot shows it as unchecked.

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**) (See parameters below)

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](#) ▾

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.

Transaction

Page: - iTPM Accrual Event Type

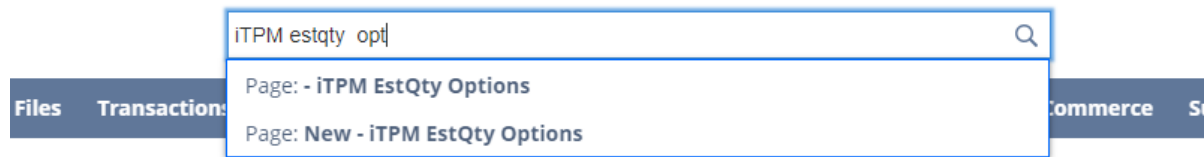
Page: New - iTPM Accrual Event Type

Commer

<div> <div> <div></div> <div></div> <div></div> <div></div> </div> <div>SHOW INACTIVES</div> <div>EDIT <input type="button" value="X"/></div> <div>QUICK SORT <input type="text"/></div> <div>TOTAL: 14</div> </div>			
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:

A screenshot of the "iTPM EstQty Options List" interface. The interface includes a header with "List", "Search", and "Audit Trail" links. Below the header, there are buttons for "VIEW Default", "Customize View", and "New - iTPM EstQty Options". A "FILTERS" section is also present. The main table has columns for "EDIT | VIEW", "INTERNAL ID", and "NAME". The table contains 8 rows of data, each with an "Edit | View" link, an internal ID, and a name. A "TOTAL: 8" indicator is shown on the right side of the table.

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)** **(You can also change to execute as NetSuite Admin.** Per NetSuite BFN guidelines, this is set to a non-NetSuite Admin role.)

Script Deployment

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SCRIPT	STATUS
- iTPM - Delete Record	Released
TITLE	EVENT TYPE
- iTPM - Delete Record	
ID	LOG LEVEL
customdeploy_itpm_delete_record	Error
<input checked="" type="checkbox"/> DEPLOYED	EXECUTE AS ROLE
	- iTPM Support Admin.
	<input type="checkbox"/> 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)**

Script Deployment

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SCRIPT - iTPM SU Related Promotions	STATUS Released
TITLE - iTPM SU Related Promotions	EVENT TYPE
ID customdeploy_itpm_su_relatedproms	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=7042&deploy=1	

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

CUSTOMER ATTRIBUTE employee	CUSTOMER ATTRIBUTE FIELDID ON CUSTOMER RECORD salesrep
--------------------------------	---

Script Deployment

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SCRIPT - iTPM - Deduction Promotion List	STATUS Released
TITLE - iTPM - Deduction Promotion List	EVENT TYPE
ID customdeploy_itpm_set_promotionlist	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=1849&deploy=1	

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

- iTPM CUSTOMER ATTRIBUTE salesrep	<input type="checkbox"/> INCLUDE MATCHING PROMOTIONS ACROSS ALL SUBSIDIARIES
---------------------------------------	--

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

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SCRIPT	STATUS
- iTPM - Invoice Deduction Buttons	Released
APPLIES TO	EVENT TYPE
Invoice	
ID	LOG LEVEL
customdeploy_itpm_invoice_ddnbuttons	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 ASSIGN TO TO SALESREP
- iTPM Deductions Permission	
- iTPM DEDUCTION RECORD TYPE ID	
- iTPM Deduction	

Script Deployment

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

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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

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SCRIPT
- iTPM - Invoice Deduction Buttons

APPLIES TO
Credit Memo

ID
customdeploy_itpm_creditmemo_ddnbuttons

☒ DEPLOYED

STATUS
Released

EVENT TYPE

LOG LEVEL
Error

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

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SCRIPT
- iTPM - MR Deduction Split Process

TITLE
- iTPM - MR Deduction Split Process

ID
customdeploy_itpm_mr_ddn_splitprocess

☒ DEPLOYED

STATUS
Scheduled

SEE INSTANCES
[Status Page](#)

LOG LEVEL
Error

EXECUTE AS ROLE
Administrator

PRIORITY
Standard

CONCURRENCY LIMIT
1

☐ 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

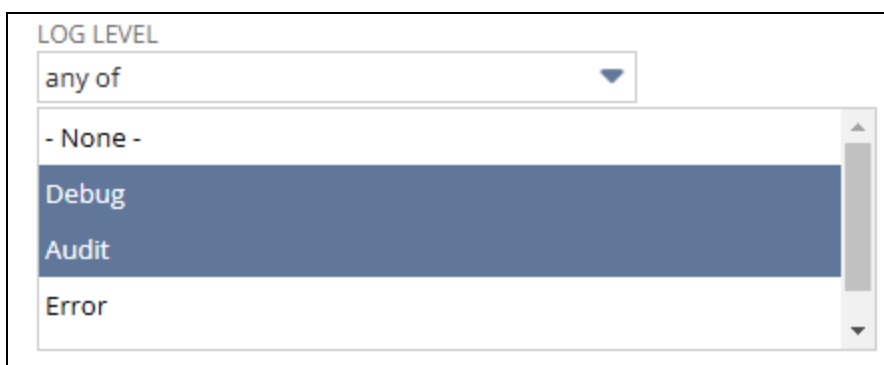
Note: If you customized any of the iTPM scripts, make sure the log level is set to ERROR: (Optional)

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

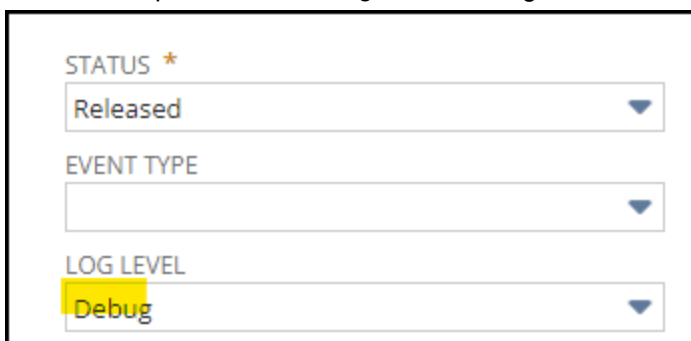
1. View any script
2. Click on SEARCH in the upper right corner:



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



4. EDIT the scripts that are *Debug* and *Audit* log level 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	<p>Use www.i-tpm.com/admin-training-resources for User Guide PDFs and Training videos.</p> <p>Documentation also available at:</p> <p>www.i-TPM.com/planning-resources</p> <p>www.i-TPM.com/deduction-management</p> <p>www.i-TPM.com/apply-off-invoice</p> <p>www.i-TPM.com/analytics</p> <p>www.i-TPM.com/annual-planning</p> <p>www.i-TPM.com/accruals</p> <p>www.i-TPM.com/see-what-is-new-in-iTPM</p>
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**.

