iTPM

25.2.1

Summer 2025 Update Release Notes

Built for ORACLE NetSuite

Native SuiteApp

BFN Certified every 6 months.

July 2025
Revised July 21, 2025

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New Features in ¿TPM 25.2.1

Accruals

1. S-06880, S-06881, S-06768: Populate Class and department in the accrual lines based on the item. (Daily Allocated Event-based Accruals)

Deductions

2. S-06803: SPLIT deduction form to allow only 1 deduction split.
3. S-05686: To support GST: Add saved search for taxes to the iTPM menu for Accounting and Classic centers: *iTPM -> Resolutions -> Settlements - Tax by Settlement*
4. S-06700 "Mass Void for Settlements" by CSV import
5. S-07031 New validation that a settlement adjustment amount can't be more than the "Bill" amount linked to the settlement.

Promotion Planning

6. S-06835: Create new fields in the ¿TPM Retail Event custom record to store data from other 3rd party sources (Also S-06821)
7. S-06882: Add a new checkbox in the promotion type for "True-up Liability using Sell-through data".
8. S-07002, S-07067: Allow update to Estimated Volume of approved promotions if user's role has appropriate permissions
9. S-07108: Create an easier way to Mass SUBMIT your promotions for approval
10. S-07122: Create an easier way to Mass CLOSE your approved promotions.
11. S-07150: Create an easier way to Mass APPROVE your draft and pending approval promotions.
12. iData: New SuiteApp to import 3rd party syndicated data into NetSuite and use it in ¿TPM promotions as sell-through volume.

Note: Go to Technical Release notes for 25.2.1 at www.i-TPM.com/admin-training-resources to see a list of the 100+ changes to ¿TPM in 25.2.1

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1. Class and Department populated in ¿TPM Event-based Accrual Lines based on item

Benefits: For clients where department and/or class is based on item, ¿TPM automatically populates these in the accrual lines for Daily Allocated Event Accruals.

If NetSuite is configured to allow department in transaction lines, department is populated with department from the item.
If only one department per transactions, then department from the accrual configuration populates department in the lines.

Lines | Communication | System Information | GL Impact

ACCOUNT	DEBIT	CREDIT	MEMO	ITEM TYPE	TRANSACTION AMOUNT	NAME	DEPARTMENT	CLASS	ITPM ITEM	HISTORY
4009 Sales : Trade Promotion (contra revenue)	249.66		Increase			Aldi	Engineering	Consumer Goods	ACC00002	History
1361 Accruals : Accruals Current Year		249.66	Increase			Aldi	Engineering	Consumer Goods	ACC00002	History
4009 Sales : Trade Promotion (contra revenue)	249.66		Increase			Aldi	Sales	Consumer Goods	ACC00004	History
1361 Accruals : Accruals Current Year		249.66	Increase			Aldi	Sales	Consumer Goods	ACC00004	History
4009 Sales : Trade Promotion (contra revenue)	249.66		Increase			Aldi	Sales	Merchandise	ACC00007	History
1361 Accruals : Accruals Current Year		249.66	Increase			Aldi	Sales	Merchandise	ACC00007	History
4009 Sales : Trade Promotion (contra revenue)	249.66		Increase			Aldi	Sales	Accessories	ACC00008	History
1361 Accruals : Accruals Current Year		249.66	Increase			Aldi	Sales	Accessories	ACC00008	History

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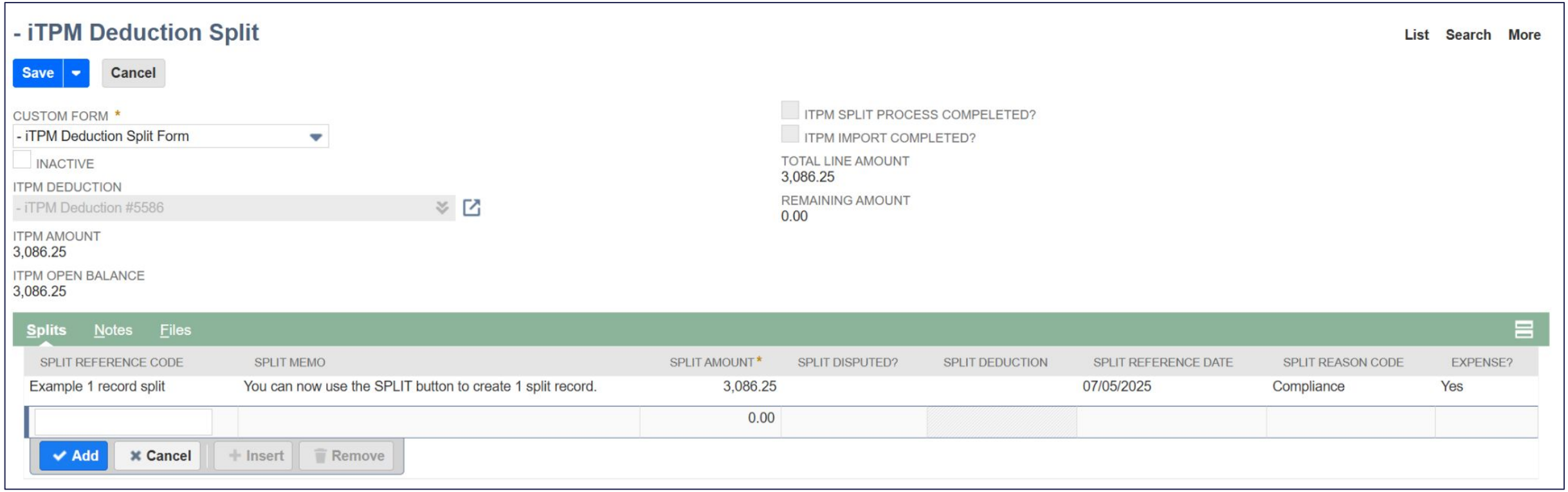
2. Split deduction form allows split off of full amount in one deduction

Benefits: Option to create only one split-off record using the SPLIT button for situations where you need to create a new deduction for the same amounts.



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3. New saved search: *iTPM -> Resolutions -> Tax by Settlement*

Benefits: Save time reviewing journal entries created by ¿TPM on taxable settlements.

- iTPM Settlements W/GST: Results

List Search Audit Trail

Return To Criteria | Edit this Search

FILTERS

SUBSIDIARY: - All - | CUSTOMER: - All - | PROMOTION: - All - | PERIOD: | DATE: All

FROM: | TO: | STYLE: Normal

EDIT | Journal #jou00009350 — Journal #jou00009552 | TOTAL: 226

DATE CREATED	LAST MODIFIED	PERIOD	SETTLEMENT #	GST JE	STATUS	CUSTOMER	PROMOTION	PROM #	MEMO	AMOUNT (NET GST)	GST CODE	GST AMOUNT	APPLIED TO	TOTAL WITH GST
02/14/2025 7:16 am	02/14/2025 7:32 am	Feb 2025	678	Journal #JOU00009350	Applied	Metcash	Example coop	50376		500.00	TS-AU	45.45	- iTPM Deduction #6387	545.45
02/14/2025 7:55 am	02/14/2025 8:02 am	Feb 2025	679	Journal #JOU00009351	Applied	Metcash	Example coop	50376		330.00	TS-AU	30.00	- iTPM Deduction #6387	360.00
02/14/2025 9:05 am	02/14/2025 9:17 am	Feb 2025	685	Journal #JOU00009353	Applied	Metcash	Example coop	50376		227.27	TS-AU	22.73	- iTPM Deduction #6383	250.00
02/17/2025 5:36 am	02/17/2025 5:49 am	Feb 2025	688	Journal #JOU00009355	Applied	Metcash	Example coop	50376		500.00	TS-AU	50.00	- iTPM Deduction #6388	550.00
02/17/2025 6:08 am	02/17/2025 6:19 am	Feb 2025	689	Journal #JOU00009356	Applied	Metcash	Example coop	50376		181.82	TS-AU	18.18	- iTPM Deduction #6386	200.00

See section 5.10 in the *¿TPM Settlements & Deductions User Guide* to learn how ¿TPM manages deductions that are taxable.

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4. Mass Void of ¿TPM Settlements by CSV import

Benefits: Save time voiding settlements if you have too many to void through the browser.

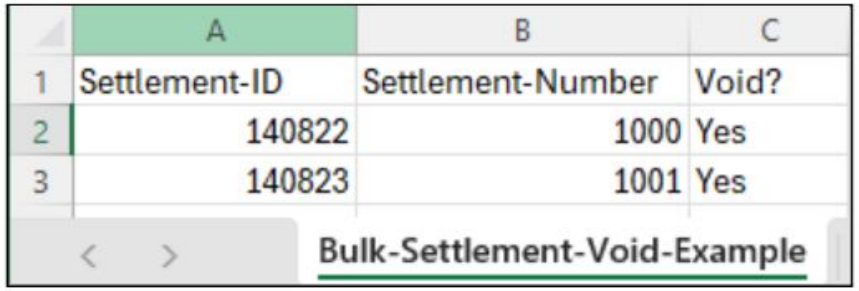
See section 2.19 in the ¿TPM Admin User Guide for full details.

Mass Settlement Void permission is required to use this feature.

Step 1. Create a CSV file with the following information for the settlements you want to create:

To save time and prevent errors, review CSV helpful hints in the Deduction User Guide, section 4.8.

Example CSV file to void two settlements.



	A	B	C
1	Settlement-ID	Settlement-Number	Void?
2	140822	1000	Yes
3	140823	1001	Yes

Bulk-Settlement-Void-Example

1. Row 1 are the column headings which tell NetSuite what we are uploading.
2. Row 2 resolves a **SETTLEMENT**
   a. Column A: **SETTLEMENT internal ID**
   b. Column B: Optional: Settlement Number (not used.. but helpful for you to validate your import.)
   c. Column C: Optional: Confirm you want to void this settlement.

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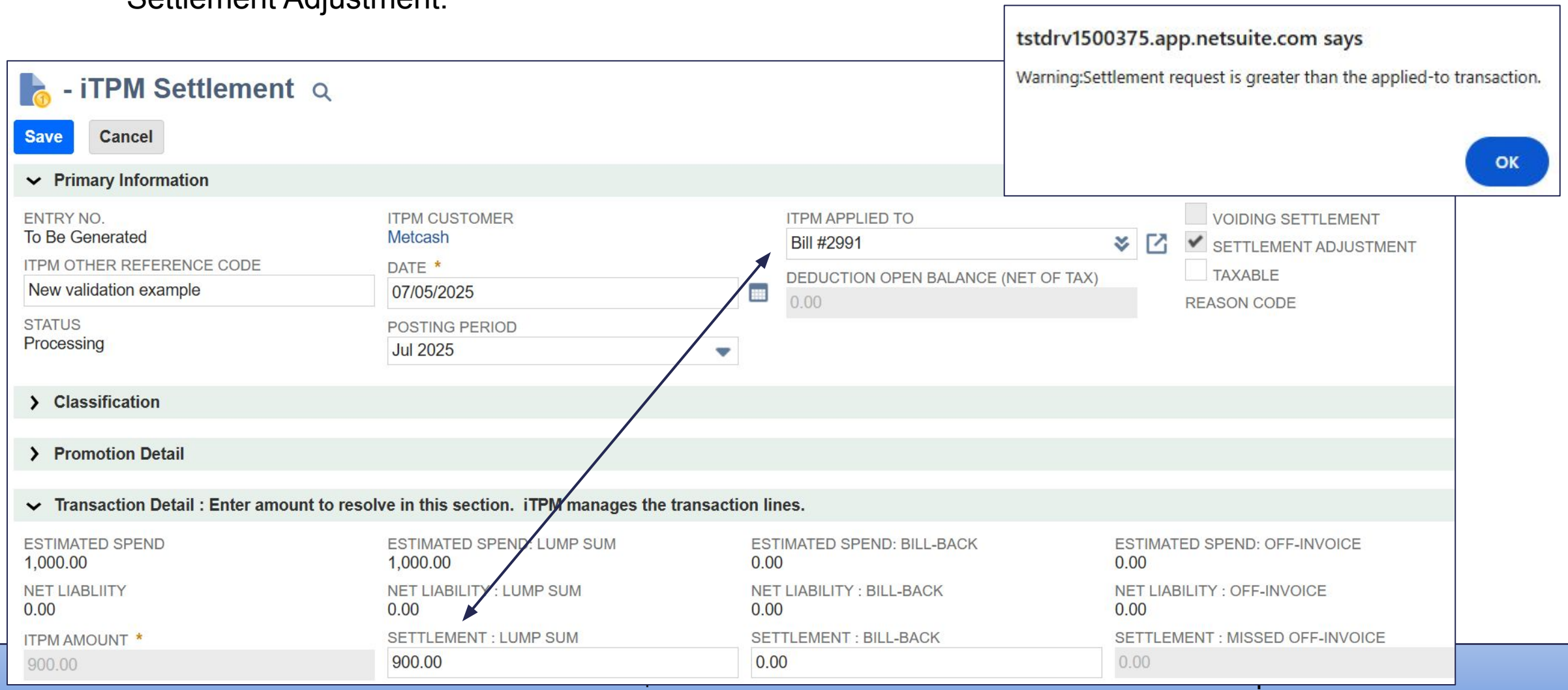
5. New validation: Adjust Spend can't be more than the transaction linked to it.

Benefits: Help prevent data entry errors by validating the transaction that's linked to the Settlement Adjustment.



6. Store 3rd Party data in the promotion by item

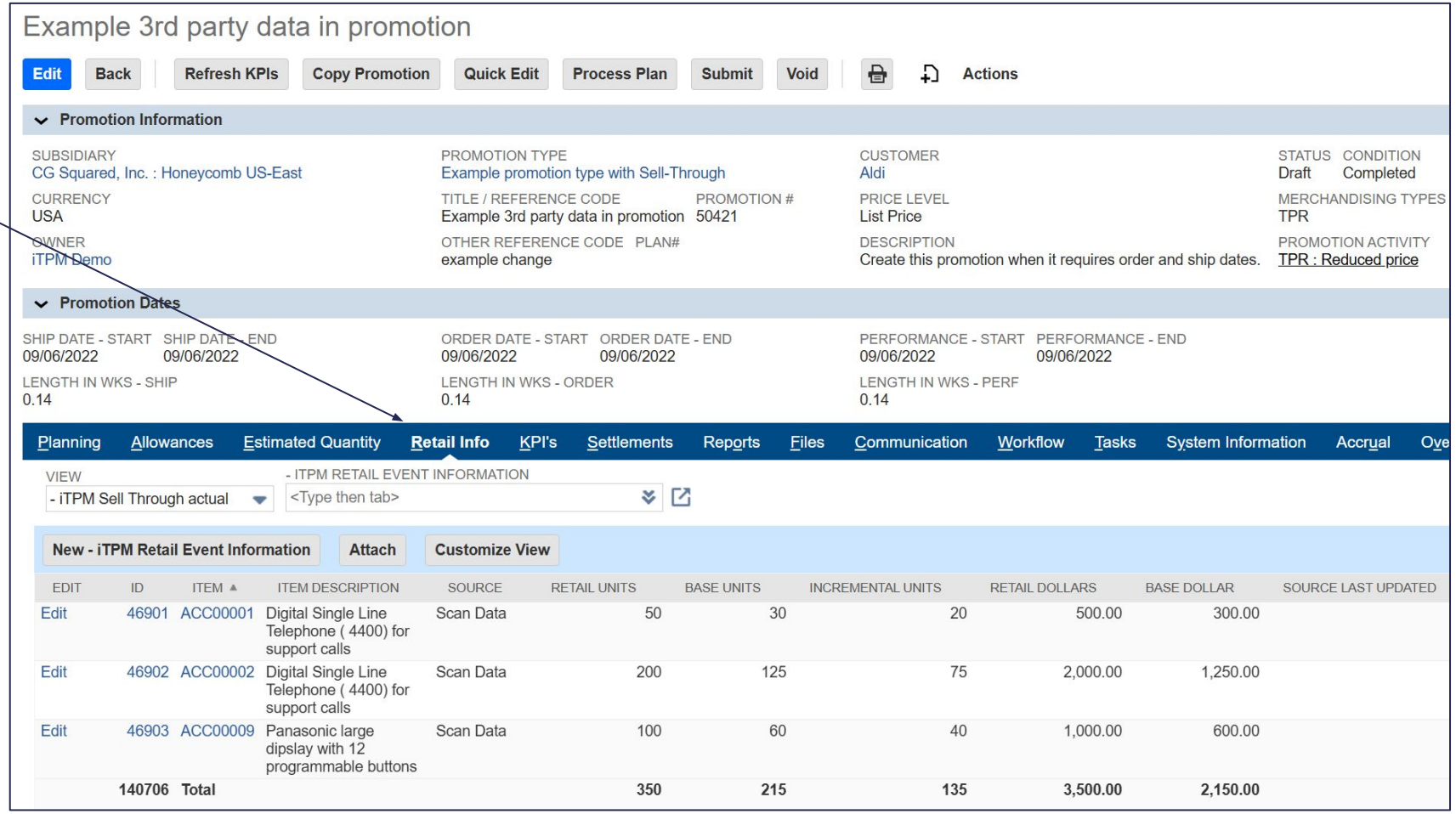
Benefits: Save time on post-promotion analysis with third party data stored directly in the promotion.

Retail Info subtab:

Each row shows summarized sell-through by item.

Populate using a CSV import, or automated process with iData.

Note:
Turn on this feature with the "Show at retail" checkbox in the Promotion Type configuration.



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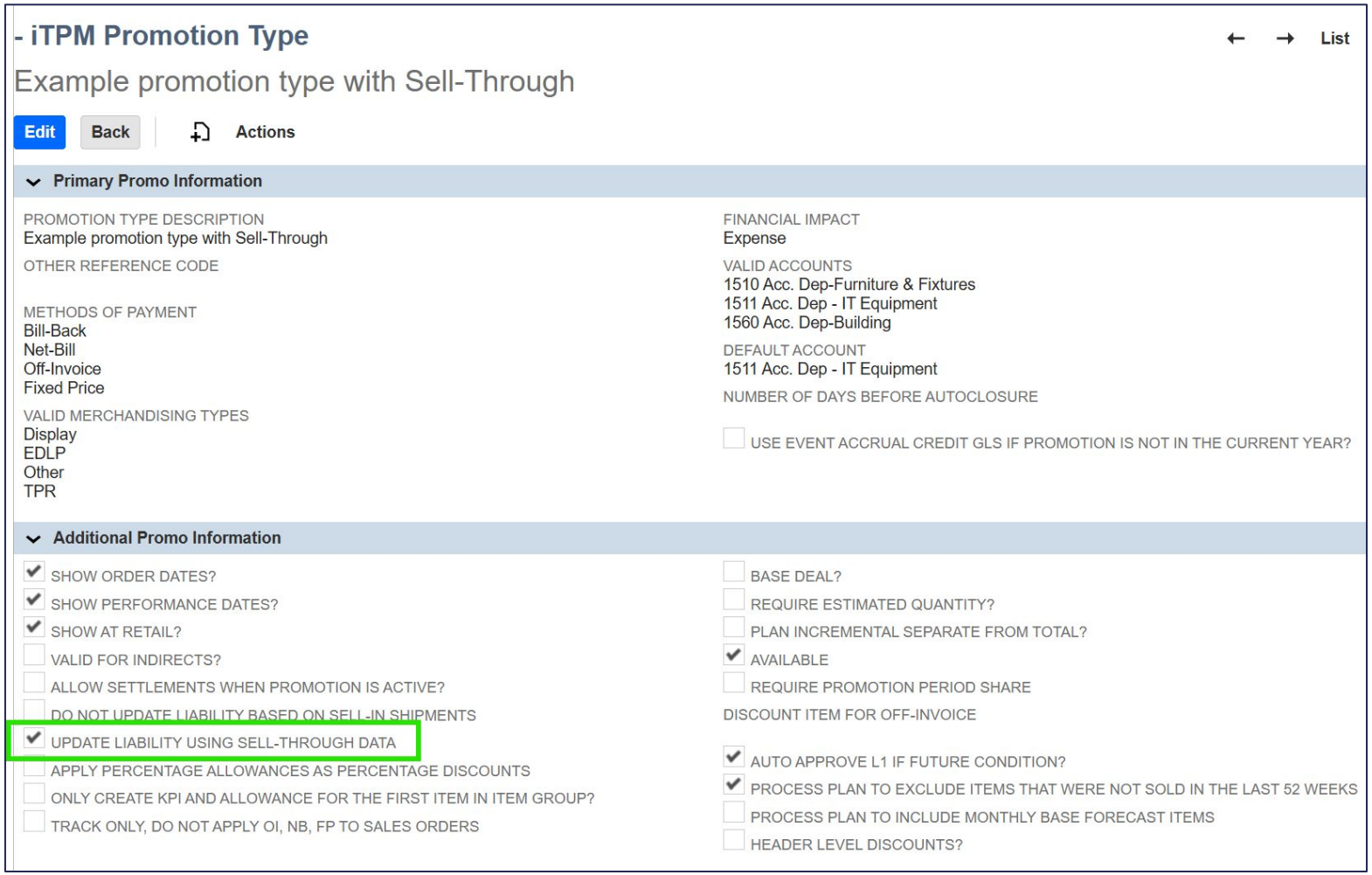
7. Option to True-up Expected liability based on 3rd Party Data Sell-through

Benefits: For customers where 3rd party data is available, improve the accuracy of your Expected Liability promotion KPI with actual sell-through data.

View sell-through data under the Retail Info subtab in the promotion.

Use iData to load your weekly data into NetSuite, summarize it by promotion and item, and populate sell-through data in the promotion.



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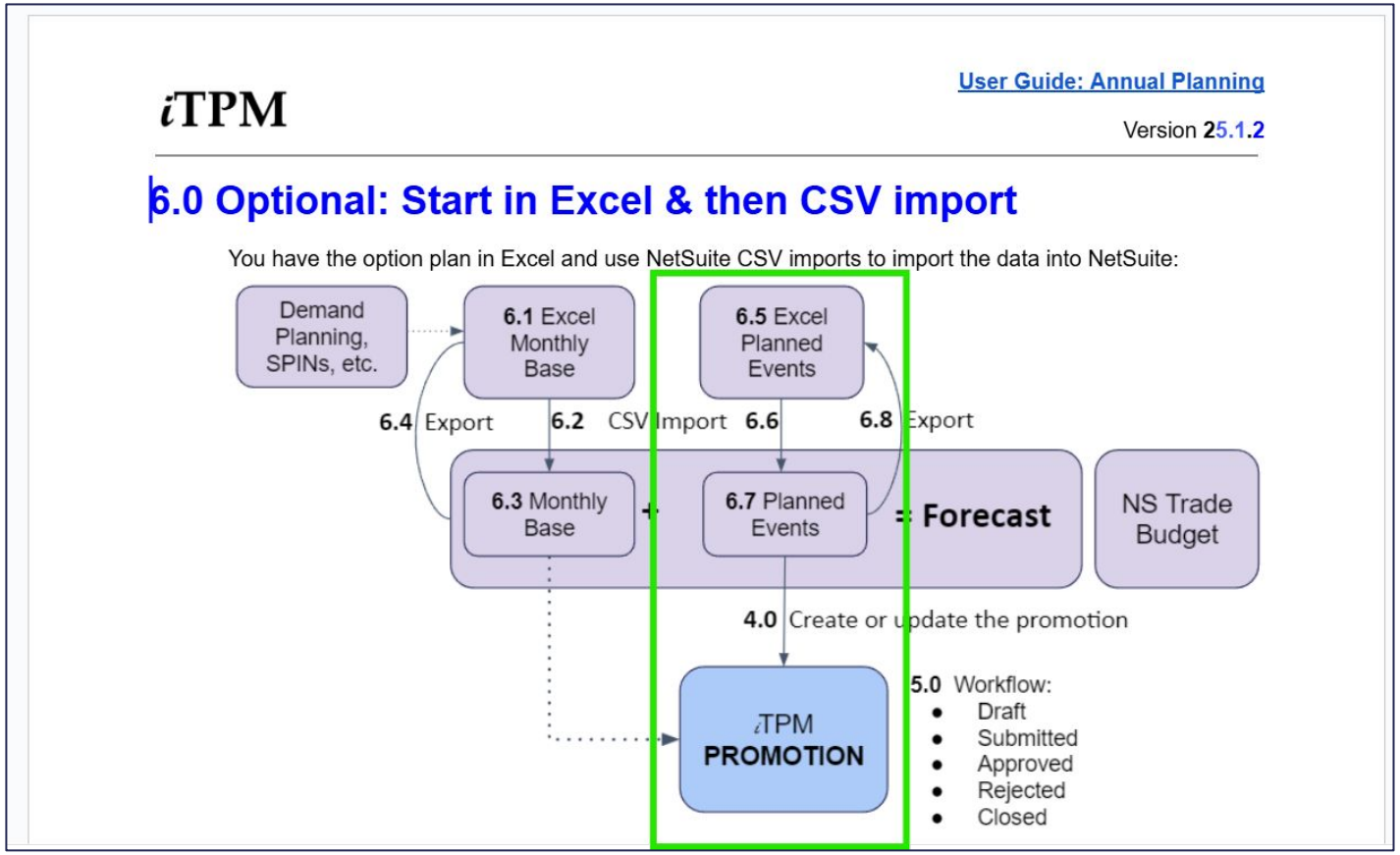
8. Allow CSV update of Estimated Volume in Approved Promotions through Plans.

Benefits: Save time updating estimated volume after promotion are approved status using the same Event Plan that was used to create the promotion.

If you created a promotion from a CSV import, you can now use the same process to update Estimated Volume for Approved promotions.

This feature also enables you to update the base volume in approved promotions using the calculated base in your Event Plan.



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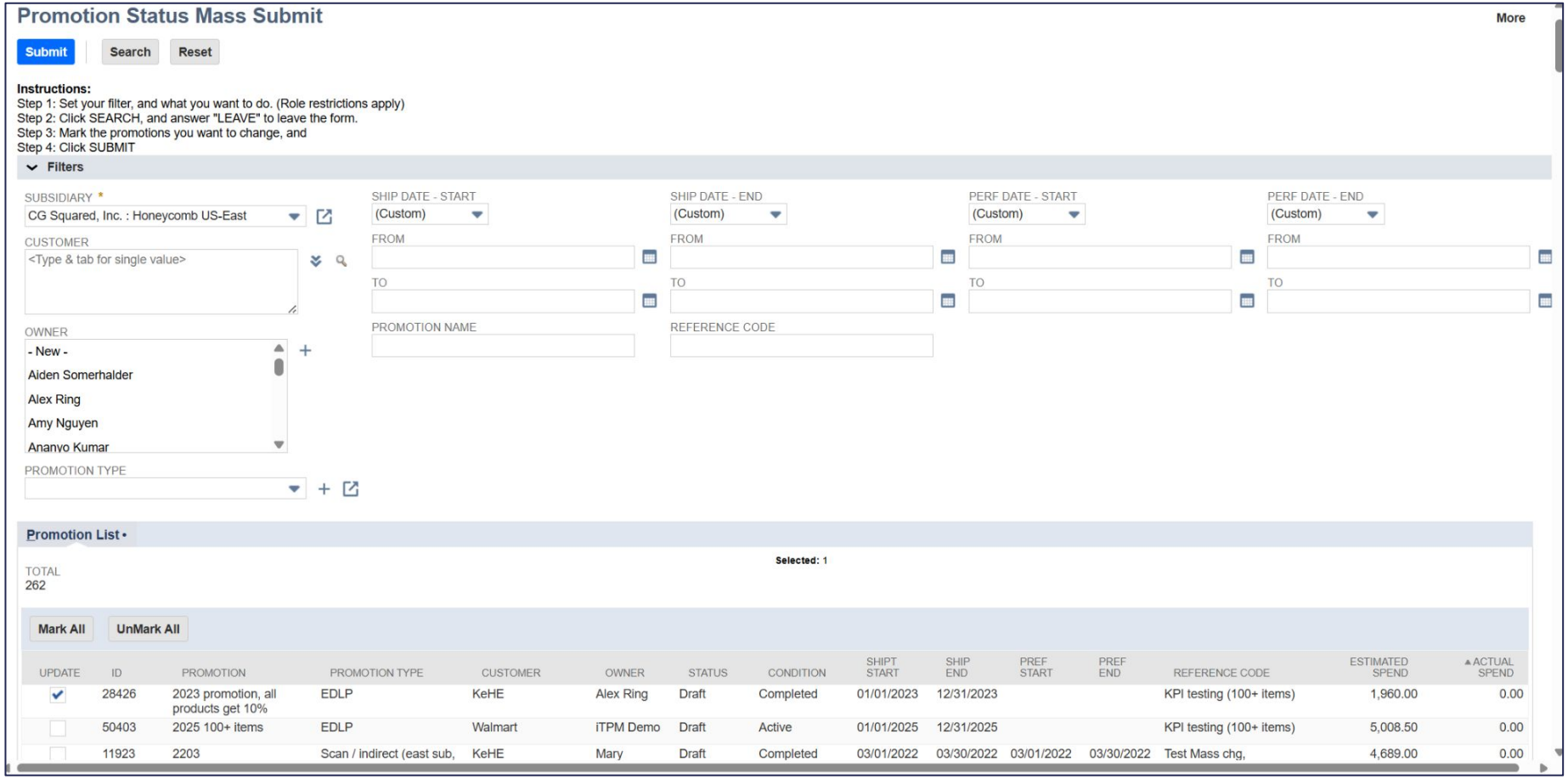
9. Mass Submit your promotions.* *iTPM -> Promotions -> Mass Submit*

Benefits: Save time mass submitting your promotions instead of one-at-a-time.

- More filter options
- Form shows you how many promotions you selected
- * Role permissions required to access this feature.



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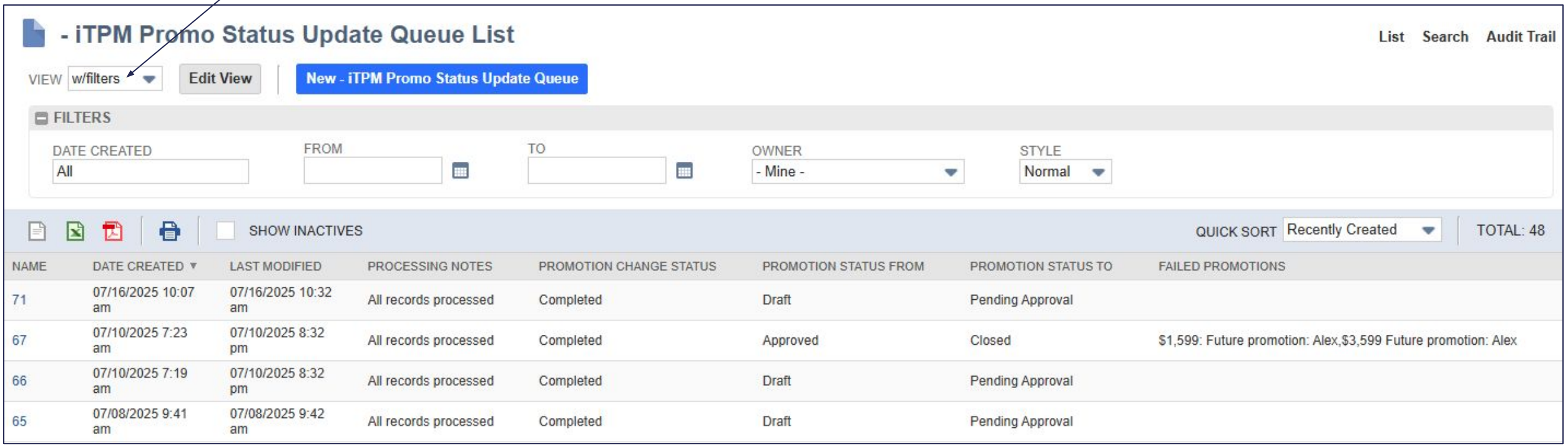
9. Mass Submit, Close or Approve Status *TPM -> Promotions -> Mass Status Change Queue*

Benefits: Save time reviewing promotions that failed validations for mass submit, close and/or approve.

Set VIEW to see the filters.



NAME	DATE CREATED	LAST MODIFIED	PROCESSING NOTES	PROMOTION CHANGE STATUS	PROMOTION STATUS FROM	PROMOTION STATUS TO	FAILED PROMOTIONS
71	07/16/2025 10:07 am	07/16/2025 10:32 am	All records processed	Completed	Draft	Pending Approval	
67	07/10/2025 7:23 am	07/10/2025 8:32 pm	All records processed	Completed	Approved	Closed	$1,599: Future promotion: Alex,$3,599 Future promotion: Alex
66	07/10/2025 7:19 am	07/10/2025 8:32 pm	All records processed	Completed	Draft	Pending Approval	
65	07/08/2025 9:41 am	07/08/2025 9:42 am	All records processed	Completed	Draft	Pending Approval	

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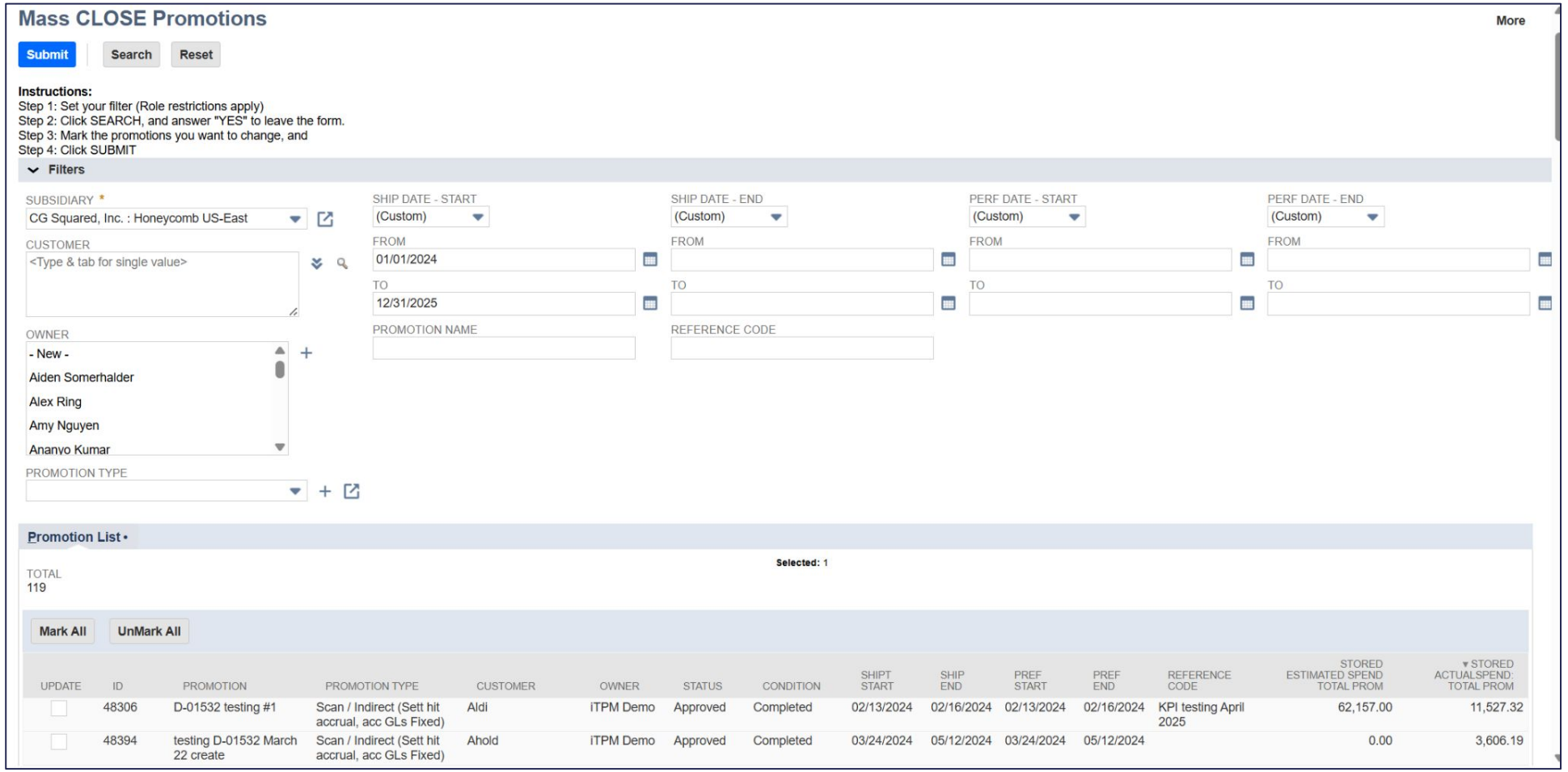
10. Mass Close your promotions.* *iTPM -> Promotions -> Mass Close*

Benefits: Save time mass closing your promotions instead of one-at-a-time.

- More filter options
- Form shows you how many promotions you selected
- * Role permissions required to access this feature.



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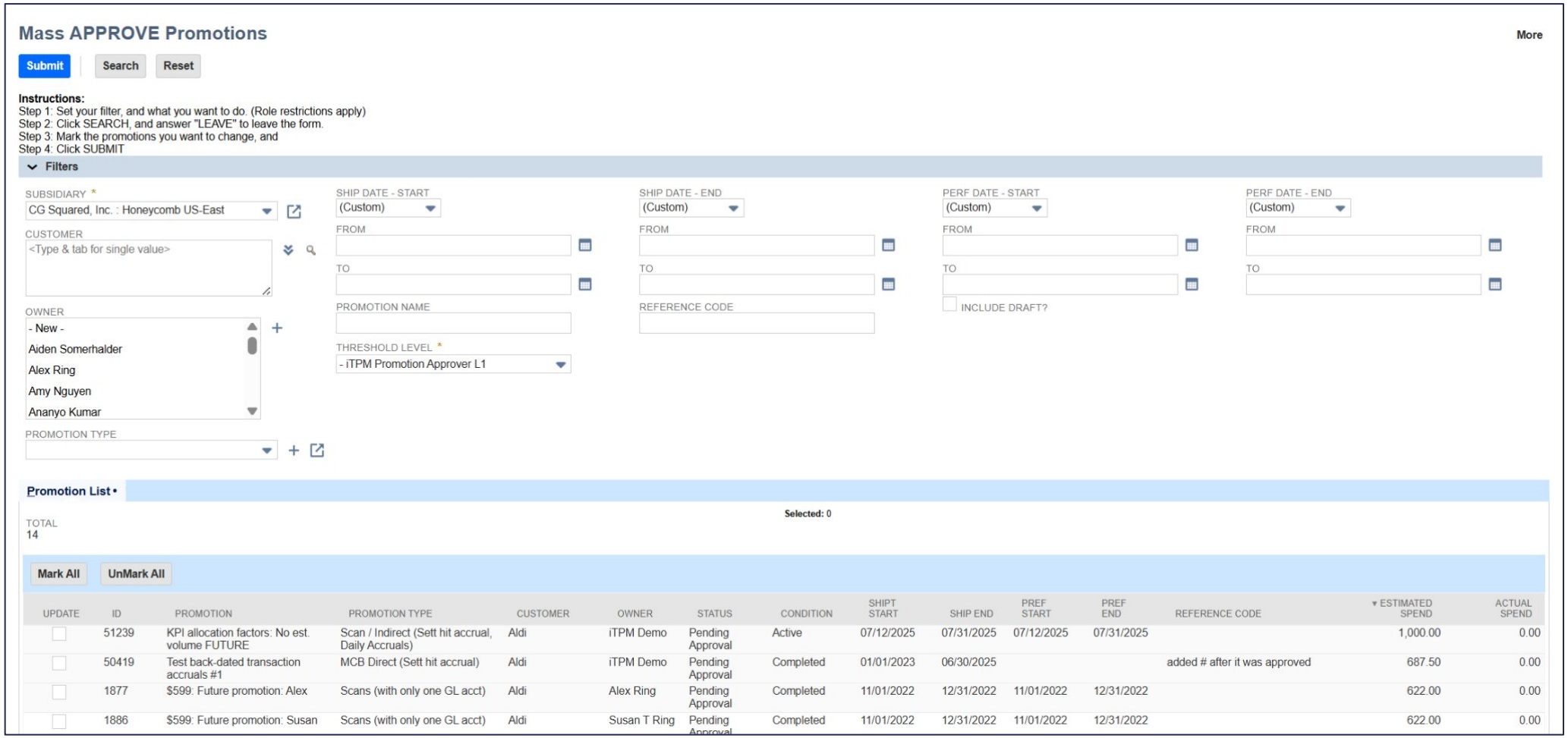
11. Mass Approve your promotions.*

iTPM -> Promotions -> Mass Approve

Benefits: Save time mass approving your promotions instead of one-at-a-time.

- More filter options
- Form shows you how many promotions you selected
- * Role permissions required to access this feature.



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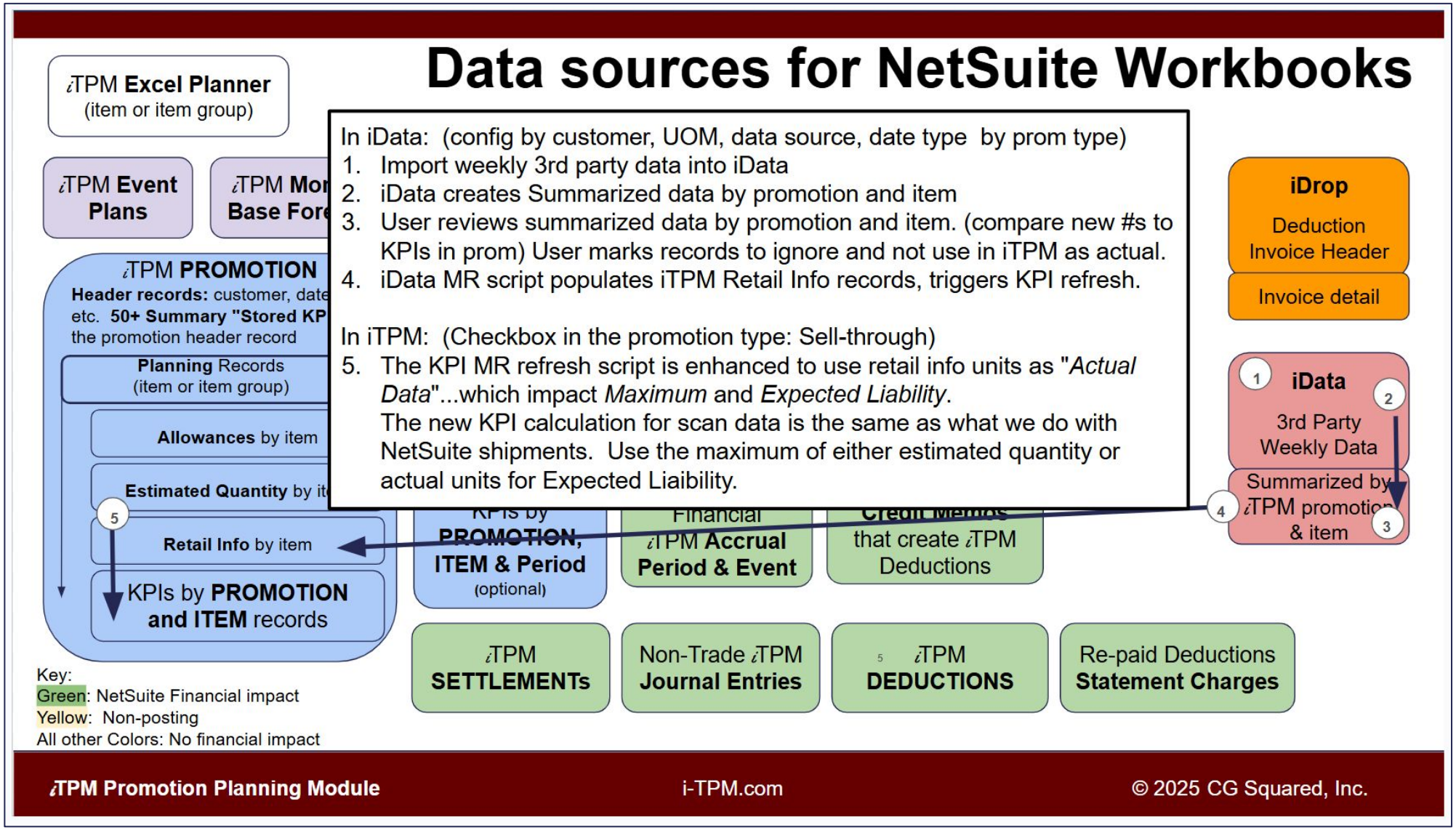
12. iData: Summarizes weekly 3rd party data by iTPM promotion & item

Benefits:

Save time updating your iTPM promotion with sell-through data with iData.



Update Schedule

The next update is tentatively scheduled for Winter **2026**.

¿TPM Anticipated Releases	Anticipated Date Generally Available*
'Minor' Updates 25.2.x	As needed. Release date and enhancements may change based on client needs and requests.
'Major' Release **26.1**.1	Winter 2026. Release date and enhancements may change based on client needs and requests.

* Subject to change

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Summary

- Email questions and issues to support@cgsquared.com
- Updated User Guides for all roles are available online at

  www.i-TPM.com/training-resources

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