Integrated Trade Promotion Management

Built for
ORACLE
NetSuite

Native SuiteApp

User Guide:

*i*TPM Off-Invoice Discounts

July 2025

Revised July 28, 2025

*i*TPM

Extend NetSuite for
Trade Promotion
Management

ANALYSIS BUDGETING PLANNING SETTLEMENTS

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> **Helpful Hint:** Click on topic links or page numbers to go directly to that section.
> **C**lick on *__User Guide: Off-Invoice Discounts__* at the top of the page for the table of contents.
> Use the *__Applying iTPM Discounts__* link at the bottom of every page to the Quick References.

> ⚠️ **Note:** This user manual is written with the assumption that *i*TPM users are already familiar with NetSuite and have received basic NetSuite training on navigation and features.
>
> Users unfamiliar with NetSuite should read the ***NetSuite Basics*** User Guide at
> www.i-TPM.com/promotion-planning

iTPM

Quick Reference: Applying *i*TPM Discounts

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

Step	Description of tasks and workflow
2.1	Create and approve *i*TPM Promotions with off-invoice discounts User Guides online at www.i-TPM.com/apply-off-invoice
3.1	Create a sales order. If you want *i*TPM discounts on sales orders, check the "*Apply iTPM Discounts*" checkbox under the iTPM subtab. This checkbox may be automatically checked in your NetSuite account.
3.2	Reprice a sales order with off-invoice discounts that was changed? Check the "*Apply iTPM Discounts*" checkbox under the iTPM subtab. This checkbox may be automatically checked in your NetSuite account when you save the sales order.
3.4	**Confirm off-invoice allowances are accurate.** The "*iTPM_Discounts*" subtab on the sales order shows you promotions and discounts that are available to be applied to the order. Review the sales order and make corrections or re-apply if needed. ● Missed off-invoice on the sales order ● Doubled allowances, or incorrect application of off-invoice allowances
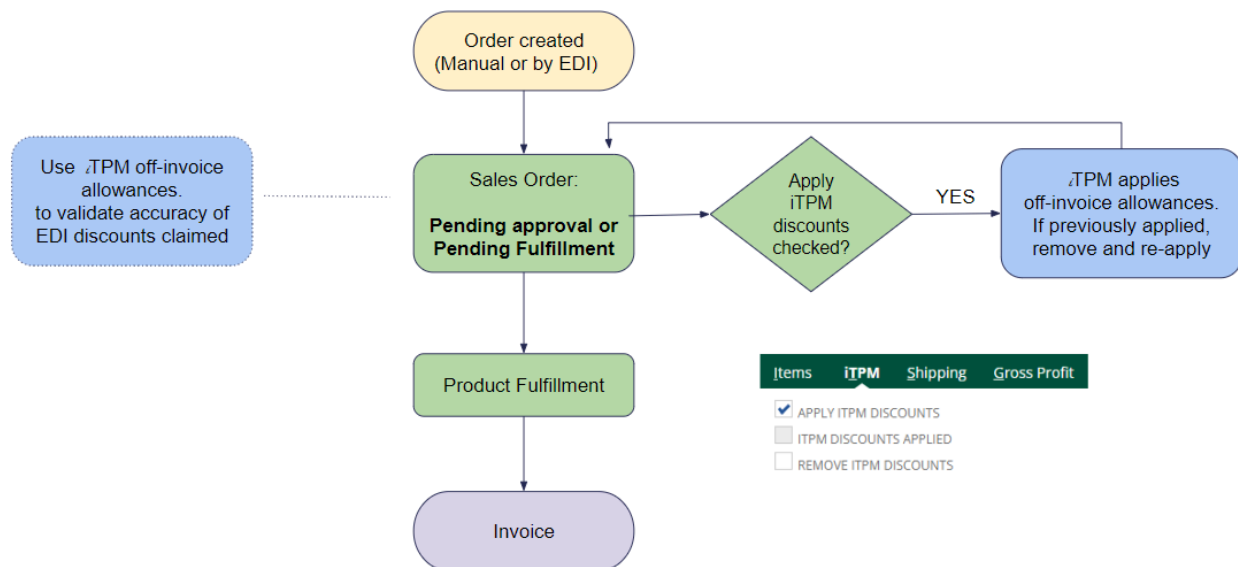
1.0 NetSuite Order to Cash Overview

*i*TPM works with the native NetSuite order to cash functionality.

1.1 Workflow: Sales order to fulfillment to invoice

Here is a simplified overview of NetSuite sales orders and its relationship to invoices:

EDI Order (optional)   ----->   Sales Order   ----->   Fulfillment   ----->   Invoice

Sales Orders: In NetSuite, sales orders can be manually created through the browser interface, or created through EDI. Orders are specific to a customer and have one or more NetSuite items.

Fulfillment: In NetSuite, this describes the process of processing the items on a sales order and shipping the product to the customer.

Invoices: Using standard NetSuite functionality, you typically create invoices directly from sales orders as part of the order to invoice workflow. The NetSuite price level and NetSuite discount items containing off-invoice allowances automatically flow from the sales order to the invoice.

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1.2 Sales order statues and *i*TPM

*i*TPM only applies and removes discounts on sales orders in *PENDING APPROVAL* and *PENDING FULFILLMENT* status, and ONLY if the "Apply iTPM Discounts" checkbox is checked in the sales order.

Sales order Status	*i*TPM discounts
Pending Approval Pending Fulfillment	When you check "*Apply iTPM Discounts*", the sales order will show a banner while discounts are applied or removed. When you refresh your browser page, if the banner is no longer displayed, then *i*TPM has applied *i*TPM discounts to your sales order.
Partially Fulfilled Fulfilled Invoiced Canceled Closed	Even if "*Apply iTPM Discounts*" is checked on the sales order, no banners will display on the sales order because *i***TPM will NOT apply or remove any discounts on sales orders in these statuses**.
Sales orders with errors or workflows that lock the sales order.	If a sales order can't be edited and saved by a user in the browser, *i*TPM will not be able to apply or remove *i*TPM discounts in any order status. When this happens, the *i*TPM banner "*Please wait…*" will not go away and the sales order appears to be 'stuck' processing *i*TPM discounts.

1.3 Item Prices and Price Levels

Sales orders have a price for every item. NetSuite has multiple ways to populate the item price.

Price levels

NetSuite can manage an item's price by price level.   ***i*TPM does NOT change the price level of items in your sales order.** This is native NetSuite functionality, and during your implementation you may customize and configure your sales orders to use NetSuite price levels.

NetSuite supports price levels by item, by customer, and other configurations. The NetSuite price level is used to determine the price of an item on sales orders and invoices.

The *i*TPM promotion has a price level, but it is only used to calculate the promotion's proforma KPIs. For example, the estimated cost of a 10% discount needs to be multiplied by the quantity and price of the item. The price level in the promotion does not have any impact on the price level used in actual sales orders.

Customer specific pricing

Native NetSuite functionality can also set item pricing by customer.   This is set by native NetSuite functionality or by customizations specific to your organization.

> ⚠️ **Note:** If you use NetSuite customer specific pricing, the price level in sales orders will be 'CUSTOM', and *i*TPM will NOT apply Fixed price discounts to those items in the sales order.

Custom EDI Fields: Customer Requested Price

If you use an EDI vendor, you probably have two custom fields on your sales order. One field, like TP Price or EDI Price, shows the price requested by the customer through the EDI transactions. The second field, like EDI UOM or TP UOM, shows the unit-of-measure of the customer's requested price. The SO Compare report under the *iTPM_Discounts* subtab on the sales order can use these fields for reporting if they are available.

> ℹ️ **Helpful Hint:** *i*TPM does NOT apply or remove fixed-price discounts to items that have the price level = CUSTOM.   The custom price level in NetSuite is used to override the default price level and price of an item in the sale order. (See also customer specific pricing above.)

1.4 NetSuite Suite Promotions? Deals & Rebates?

*i*TPM does not require and does not use any components of the native NetSuite Suite Promotions.   *i*TPM and Suite Promotions can co-exist in your NetSuite account.   For example, you can use Suite Promotions for your Netsuite eCommerce website, and also use *i*TPM for your "B to B" trade promotions.

*i*TPM does not require and does not use any components of the managed bundle "NetSuite Deals & Rebates". *Deals and rebates* and *i*TPM can co-exist in your NetSuite account.   For example, you use *Deals and Rebates* for your rebate revenue that is due from vendors, and use *i*TPM for trade spending to your customers that is an expense on your P&L.

1.5 NetSuite Discount Items

Off-invoice allowances are applied to items using a NetSuite discount item. These items appear as a row under the item that they apply to.

The discount item can be either a rate per unit or a percent discount. The discount applies to the price shown of the item in the row above. The GL impact of the discount is determined by the GL-account associated with the discount item. If the item in the sales order has *department* populated, it will be used in the discount item. If *department* is not populated in the item, then *i*TPM looks for the department for the item. If department is also blank in the discount item, then department will be blank in the discount item in the sales order.

To increase the amount of a sales order, use *i*TPM Header Surcharge method-of-payment. If you need to apply upcharges to individual items, contact the *i*TPM support team.

> ⓘ **Helpful Hint:** The *i*TPM discount item is created with a zero rate and zero % discount. The discount rate or percent is populated in the sales order dynamically based on the overlapping promotion.

1.6 EDI

If you have orders created by EDI, you have options:

- **Use *i*TPM to validate sales order discounts**: Let your EDI vendor create the order with discounts taken by your customer. If you choose this option, your assumption is that the customer is correctly claiming off-invoice discounts.

- **Use *i*TPM to apply off-invoice discounts to the sales order**. If you choose this option, you take control of pricing on sales orders and 'force' promotional off-invoice pricing to be generated from approved *i*TPM promotions.

> ⚠ **Note:** If you use *i*TPM to apply off-invoice discounts to sales orders,
> - If the EDI vendor changes the sales order type after it is created in NetSuite, all *i*TPM discounts may be lost and need to be reapplied. This does not occur often, but when it does you'll need to reprice the sales order if you don't have a script that automatically does this.
> - If the EDI vendor creates discounts items, *i*TPM only removes discount items created by *i*TPM.

1.7 Line Level vs. Header Discounts

You have the option to apply *i*TPM discounts at the line level, or only once to the entire sales order.

In the example below, rows labeled "Off-invoice" is an example of discounts applied line-by-line in the sales order.
- Line level discounts include off-invoice, net-bill, and fixed-price method-of-payments.
- Off-invoice discounts will appear as extra rows under each item.
- Net-bill and Fixed-price discounts will replace the default NetSuite price of the item in the sales order.

The last two rows are examples of discounts and surcharges applied once to the sales order.
- *i*TPM method-of-payments include header-discounts and header-surcharges.
- *i*TPM adds a Subtotal to the sales order if your sales order doesn't already have one.
- A header discount is applied to the subtotal, and it reduces the sales order total amount.
- A header surcharge is also applied to the subtotal, but it increases the sales order amount.

	Items	Address	Shipping	Messages	History	iTPM	iTPM Discounts			

EXCHANGE RATE
1.00
COUPON CODE

ITEM	UOM	AVAILABLE	QTY	DESCRIPTION	PRICE LEVEL	PRICE	AMOUNT
CAR00007	Ea(12/cs)	7,978	25	HP 15 Ink Cartridge - Black	List Price	24.99	624.75
Off-invoice				CAR00007, Promotion: Kehe OI Rate per unit Test UOM $0.0833/Each(12)	Custom	-2.0833	-2.08
CAR00008	Ea(12/cs)	117,480	1	HP 96A Toner - Black	List Price	97.95	97.95
Off-invoice				CAR00008, Promotion: Kehe OI Rate per unit Test UOM $0.0833/Each(12)	Custom	-0.0833	-0.08
SUB-TOTAL					Custom		720.54
Example Header Discount				Promotion: 1% defect allowance on everything 1%	Custom	-1.0%	-7.21
Example Header Surcharge				Promotion: $25 handling fee per order $25.0000	Custom	25.00	25.00

Selecting line level vs. header discounts:
- **Promotion Type:** This configuration determines what method-of-payment is available for the promotion type. If "*Header level discounts?*" is NOT checked, the discount is line-level.
- **Method-of-Payment in the promotion**: When creating the promotion, the user has the option to select a method-of-payment that's valid for the promotion.

> ⚠ ***Note:** *i*TPM 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.

2.0 Overview of *i*TPM Off-invoice discounts

You control if and when *i*TPM will apply off-invoice discounts to your sales orders. Work with your *i*TPM support team to select the following option that is best for your company:

- Option A: You also have the option to <u>customize your sales order form and workflows</u> to **automatically have *i*TPM apply off-invoice discounts anytime you save a sales order**. This approach ensures that off-invoice will always be updated when there are changes to your sales orders. The down-side to this approach is that even if the change to your sales order doesn't impact off-invoice discounts, your sales order will still go through the steps to reprice it. (Discuss deploying the "*- iTPM UE Salesorder Apply Discount*" script with the *i*TPM support team.)

   You can set newly created sales orders to **automatically apply *i*TPM off-invoice discounts when you first save a sales order**. (Do this by defaulting the "*Apply iTPM Discounts*" checkbox to *checked*.) This option does NOT automatically reprice a sales order if you make changes, and puts the burden of repricing the sales order on the user.

- Option B: **Manually click the "*Apply or ReApply iTPM discounts*"** button on the sales orders. This puts the burden of applying *i*TPM discounts on the user.

- Option C: **Manually check the "*Apply iTPM discounts*"** checkbox to have discounts applied to your sales orders. This puts the burden of applying *i*TPM discounts on the user.

- Option D: Don't use *i*TPM to apply discounts to sales orders. Just compare the net item price on the sales order to the net item price if *i*TPM applied off-invoice discounts to the sales order.

*i*TPM uses **four criteria** to determine if a sales order qualifies for off-invoice or net-bill allowances:

1. **Customer**: The *i*TPM promotion must be for this **customer or its 'parent'**., i.e., Sales order is for a DC, and the off-invoice promotion was created for the corporate parent.
2. **Date**: (One of these two options)
   a. If the "*Use ship-date to apply iTPM discounts*" flag is checked on the customer record, then the **expected ship date for each item**, (which is the anticipated ship date) must be equal to or in between the **ship dates on the promotion**
   b. If the "*Use ship-date to apply iTPM discounts*" flag is NOT checked on the customer record, the **order transaction date** must be equal to or in between the **order dates** on the promotion. Note: If order dates are blank, *i*TPM uses the promotion's ship dates.
3. **Method of Payment**: The MOP must be either off-invoice, net-bill, fixed price, or header allowances.
4. **Item**: For item-level discounts, the item on the order must match the item on the promotion allowance.
   ○ The first two must match to see a promotion in the Promotion sublist.
   ○ The first three must match to see the allowances in the off-invoice or net-bill sublist.

ALL four of the above must match for *i*TPM to apply an off-invoice, net-bill or fixed price to a sales order.
ONLY Customer and Date must match for header discounts and header surcharges to be applied.

2.1 *i*TPM Promotions

To see a list of your *i*TPM promotions in NetSuite, go to ***iTPM -> Promotions -> List***

To see which promotions are available to be applied to sales orders created today, set your filter to see Condition = *ACTIVE*, Status = *Approved*, and promotion types which have the off-invoice, net-bill, and/or fixed-price method-of-payment enabled.

Promotions may be created using NetSuite item groups under the Planning subtab on the promotion. The actual discounts of the promotion by item that will be applied are under the ALLOWANCES subtab:

The allowance may be entered for any valid UOM (unit-of-measure) for that item in NetSuite. UOM in the above screenshot is Each(1). When applying a rate-per-unit discount to the sales order, *i*TPM converts the discount to the UOM of the sales order.

For even more detail, go to ***iTPM -> Promotions -> Allowances by item***
The *i*TPM Promotion Planning User Guide has more details, at www.i-TPM.com/promotion-planning

> ⓘ **Helpful Hint:** Promotions with off-invoice discounts that are in CLOSED status will NOT be applied to sales orders. If you closed the promotion in error, simply click on the REOPEN button on the promotion. Note: Additional permission is required for access to the Reopen button. See chapter 5 in the *i*TPM Admin User guide for more details.

2.2 Types of *i*TPM off-invoice discounts

Discounts applied to a sales order are determined by the method-of-payment (MOP) in the *i*TPM allowance:

- Off-invoice: *i*TPM creates one discount item under each item for every allowance
- Fixed price: No discount item is created.   *i*TPM changes the item's price*.
- Net-Bill: No discount item is created.   *i*TPM subtracts the discount from the item's price*.
- Header Discounts: Discount is only applied to the subtotal of the sales order.
- Header Surcharges: Up-charge is only applied to the subtotal of the sales order.

> ⚠ ***Note:*** *i*TPM does NOT apply or remove fixed-price or net-price discounts to items that have the price level = CUSTOM.   The custom price level in NetSuite is used to override the default price level and price of an item in the sale order.

> ⚠ ***Note:*** If you use *i*TPM to apply discounts to sales orders, do not include the Bill-Back method of payment in promotion types that have any of these off-invoice discount MOPs.

2.3 *i*TPM Discount item and GL account

Every NetSuite discount item is associated with a GL account. Netsuite associates discounts on the sales orders to the GL account in the discount item.

You select the discount item that *i*TPM uses to apply *i*TPM discounts.

Go to ***i*TPM -> Setup -> Preferences** to see the default discount item used by each of your subsidiaries.

EDIT | VIEW	INTERNALID	SUBSIDIARY	DEFAULT EXPENSE ACCOUNT	DEDUCTION ACCOUNT	SETTLEMENT ACCOUNT	ITPM DISCOUNT ITEM
Edit |View	1	Honeycomb Holdings Inc.	6019 Trade Promotion : Fees, Penalties, Misc	6023 Trade Promotion : Open Deduction	6023 Trade Promotion : Open Deduction	Off-invoice (example)
Edit |View	2	Honeycomb Holdings Inc. : Honeycomb Mfg.	6019 Trade Promotion : Fees, Penalties, Misc	6023 Trade Promotion : Open Deduction	6023 Trade Promotion : Open Deduction	Off-invoice (example)
Edit |View	3	Honeycomb Holdings Inc. : Example sub / division	6019 Trade Promotion : Fees, Penalties, Misc	6023 Trade Promotion : Open Deduction	6023 Trade Promotion : Open Deduction	Off-invoice (example)

You will have the option for each *i*TPM promotion type to have its own specific discount item, which gives you the ability to associate off-invoice allowances to specific GL accounts

To skip the discount item and apply the discount to the entire sales order, the promotion type must have "header discount" or "header surcharge" as the method of payment, and the "Header level discounts?" checkbox checked in the promotion type.

For more information on *i*TPM Preferences and configurations, see the *i*TPM Admin User Guide at www.i-TPM.com/admin-training-resources.

> **Helpful Hint:** If department is populated in the *i*TPM discount item, then iTPM will populate department in the discount item in the sales order.   If the *i*TPM discount item has NULL for the department, then *i*TPM looks for department in the item that's in the sales order.

2.4 Customer checkbox: Order dates vs shipment dates

The *i*TPM default is to use the transaction date of the sales order to apply *i*TPM discounts. You have the option to override this default by customer and use shipment dates. Your *i*TPM administrator has the option to check the "*Use Ship Dates for discounts on sales orders*" checkbox on the customer record.

Note:
- This is customer specific. If this is checked for the parent, it must also be checked for all NetSuite children entities
- *i*TPM uses the ship date of each item in the sales order to determine if the discount is valid. *i*TPM uses transaction date if the ship date is blank or null. The NetSuite field name in the sales order is *shipdate*.
- You have the option to configure *i*TPM to use a different field in the sales order in place of *shipdate*.

Information	Financial	Address	Access	Workflow	Collections	Info	Web Activity	Bank Payment Details (Debit)	Bank Payment Details (Credit)	iTPM
☑ USE SHIP DATE TO APPLY ITPM DISCOUNTS?							ITPM PARTNER			
☐ DO NOT APPLY ITPM DISCOUNTS TO SALES ORDERS?										

2.5 Overrides: Don't apply discounts

You have the option to override all *i*TPM off-invoice discounts for a customer, even if there are overlapping promotions. To do this, check "*Do not apply iTPM discounts to sales orders*?" on the customer record under the *i*TPM subtab.

Customer record override:

Information	Financial	Address	Access	Workflow	Collections	Info	Web Activity	Bank Payment Details (Debit)	Bank Payment Details (Credit)	iTPM
☑ USE SHIP DATE TO APPLY ITPM DISCOUNTS?							ITPM PARTNER			
☐ DO NOT APPLY ITPM DISCOUNTS TO SALES ORDERS?										

Two overrides on the sales order:

"*Do not apply/remove iTPM discounts on this sales order*": *i*TPM will not add or remove any discounts that overlap the sales order. If any *i*TPM discounts were previously applied to the sales order, checking this checkbox will prevent *i*TPM from removing what was previously applied by *i*TPM.

"*Skip Fixed-price discounts for this sales order*": *i*TPM will add and remove/apply off-invoice discounts, but will skip applying any fixed-price discounts that overlap the sales order. If fixed-price discounts were previously applied to the sales order, checking this checkbox will prevent *i*TPM from removing what was previously applied by *i*TPM.

Items	Address	Shipping	Messages	History	EFT	Configuration Details	iTPM	SuiteSocial	Box Files	iTPM Discounts
☐ APPLY ITPM DISCOUNTS							☐ NO OVERLAPPING PROMOTIONS / OVERRIDE			
☑ ITPM DISCOUNTS APPLIED							☐ SKIP FIXED-PRICE DISCOUNTS FOR THIS SALES ORDER			
☐ REMOVE ITPM DISCOUNTS							☐ DO NOT APPLY/REMOVE ITPM DISCOUNTS ON THIS SALES ORDER			

Promotion Type Override:

If you only want to track off-invoice in promotions, check "Track only, do not apply OI, NB, FP to Sales Order" in the promotion type.

This checkbox prevents *i*TPM from applying any discounts to the sales order, but it does allow the promotion KPIs to be updated.

2.6 iTPM Desktop Reminders

Use NettSuite reminders for real-time visibility of sales orders processing iTPM discounts.
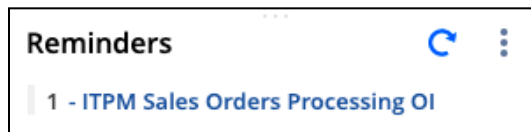
One-time Setup on your NetSuite dashboard:

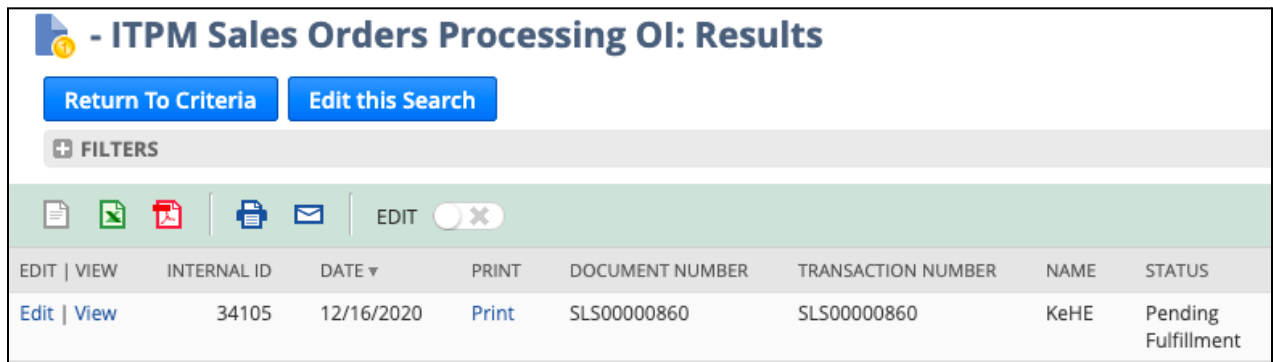- Click the three dots on the upper right corner of the reminders portlet, and select "Setup"
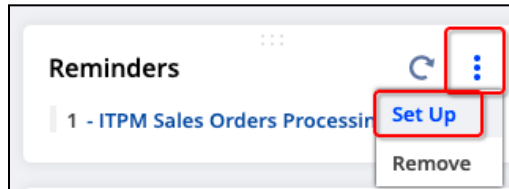
- Select "iTPM Sales Orders Processing OI, and click SAVE.
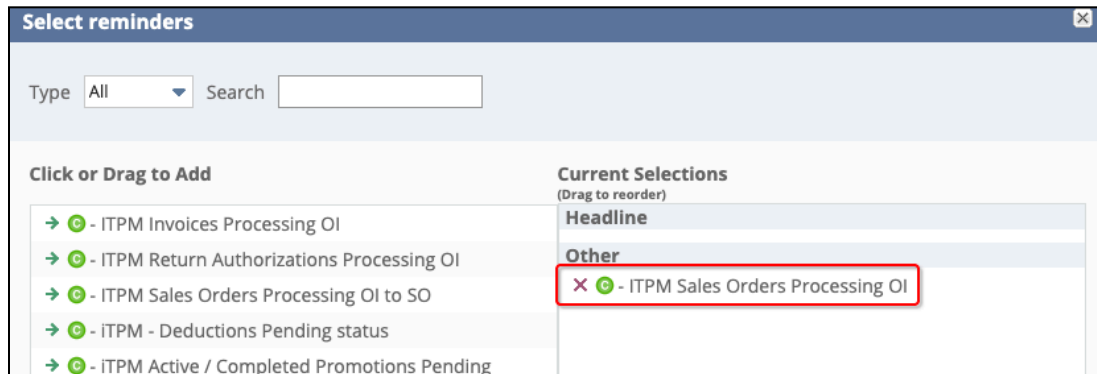
- To see how many sales orders are being processed right now, click the refresh icon in the reminders box.

- To view the sales orders, click on the link in the reminder:
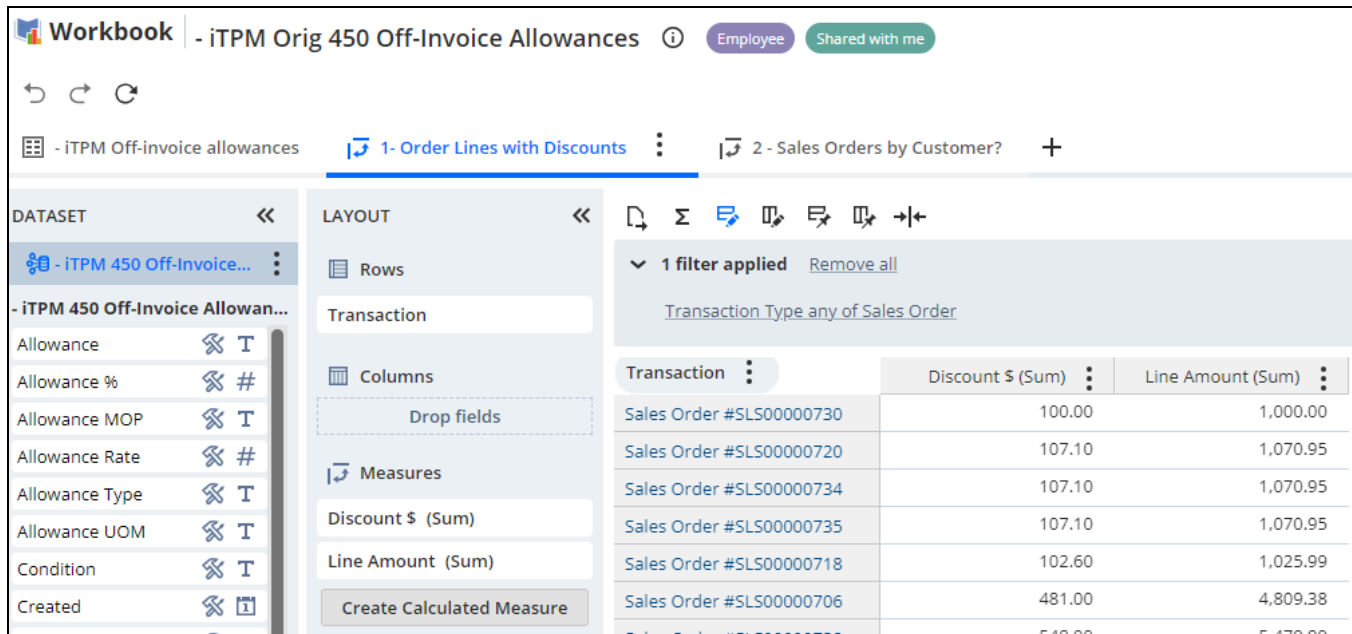
2.7 Tracking *i*TPM Off-invoice in NetSuite Workbooks

In addition to saved searches, use NetSuite workbooks to track and monitor *i*TPM discounts applied to sales orders in real-time. The next section shows how to track discounts using *i*TPM promotion KPIs.

The *i*TPM Analytics User Guide has details on how to create these workbooks for your dashboard, online at www.i-TPM.com/analytics.

Example 1: In this pivot you get a list of every line in every order where *i*TPM has applied an off-invoice discount to a sales order.   To view that sales order, click on the link to the sales order.

Example 2: View by customer, showing sales order total, discount, # of lines on the SO, and # of sales orders

You can filter your view for specific dates, NetSuite periods, and other attributes.

2.8 *i*TPM Promotion KPIs

When viewing a promotion, the KPI subtab will display results for off-invoice and net-bill allowances.

Promotion KPIs are described in more detail in the *User Guide for Promotions*, section 4.2, found at www.i-TPM.com/promotion-planning.

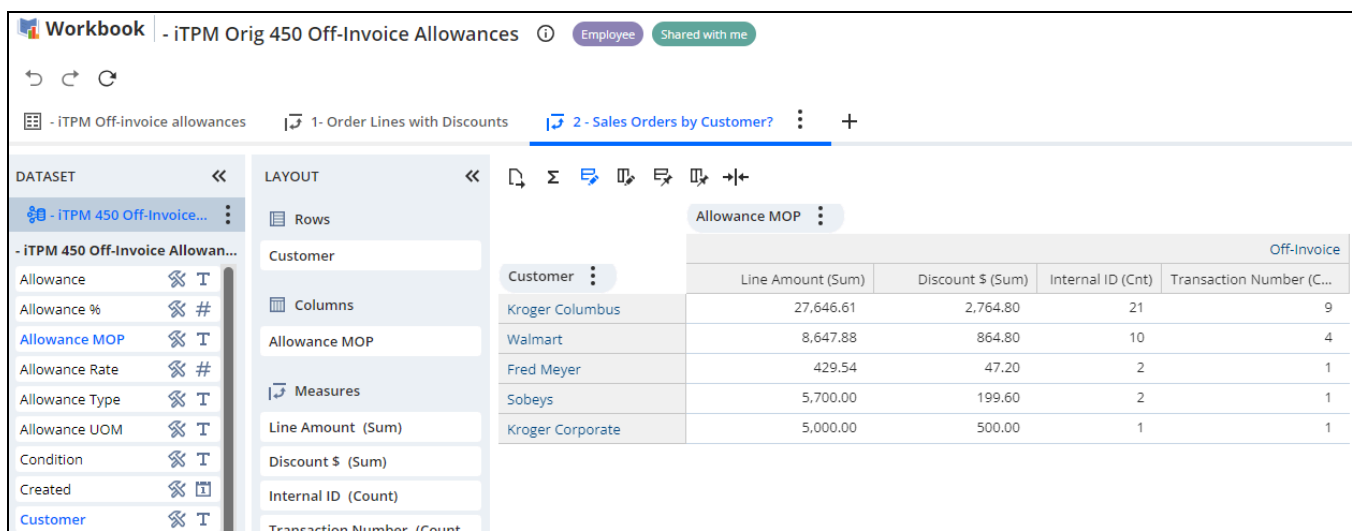| Planning	Allowances	Estimated Quantity	Retail Info	**KPI's**	Settlements	Reports	Files	Communication	Workflow	System Information	Accrual

KPI Summary	KPI Summary : Lump Sum	KPI Summary : Bill Back	KPI Summary : Off Invoice	KPI Summary : Net Bill
ESTIMATED SPEND : PROMOTION 24,007.50	ESTIMATED SPEND : LUMP SUM 500.00	ESTIMATED SPEND : BILL BACK 14,490.00	ESTIMATED SPEND : OFF INVOICE 9,017.50	ESTIMATED SPEND : NET BILL 0.00
LE SPEND : PROMOTION 24,151.50	LE SPEND : LUMP SUM 500.00	LE SPEND : BILL BACK 14,490.00	LE SPEND : OFF INVOICE 9,161.50	LE SPEND : NET BILL 0.00
MAXIMUM LIABILITY : PROMOTION 2,727.00	MAXIMUM LIABILITY : LUMP SUM 500.00	MAXIMUM LIABILITY : BILL-BACK 98.00	MAXIMUM LIABILITY : OI 2,129.00	MAXIMUM LIABILITY : NET BILL 0.00
EXPECTED LIABILITY : PROMOTION 2,727.00	EXPECTED LIABILITY : LUMP SUM 500.00	EXPECTED LIABILITY : BILL-BACK 98.00	EXPECTED LIABILITY : OI 2,129.00	EXPECTED LIABILITY : NET BILL 0.00
ACTUAL SPEND : PROMOTION 2,129.00	ACTUAL SPEND : LUMP SUM 0.00	ACTUAL SPEND : BILL-BACK 0.00	ACTUAL SPEND : OI 2,129.00	ACTUAL SPEND : NET BILL 0.00
NET LIABILITY : PROMOTION 598.00	NET LIABILITY : LUMP SUM 500.00	NET LIABILITY : BILL-BACK 98.00	NET LIABILITY : OI 0.00	NET LIABILITY : NET BILL 0.00
OVERPAY : PROMOTION 0.00	OVERPAY : LUMP SUM 0.00	OVERPAY : BILL-BACK 0.00	OVERPAY : OI 0.00	OVERPAY : NET BILL 0.00
REQUESTED SPEND: PROMOTION 0.00	REQUESTED SPEND: LS	REQUESTED SPEND : BB	REQUESTED SPEND : OI 0.00	REQUESTED SPEND : NB 0.00
PENDING SPEND : PROMOTION 0.00	PENDING SPEND : LS	PENDING SPEND : BB	PENDING SPEND : OI 0.00	PENDING SPEND : NB 0.00

For more information on how to resolve customer deductions for missed off-invoice, go to the on-line user guides at www.i-TPM.com/deduction-management

> **Helpful hint:** If off-invoice allowances are missed and not entered on an invoice, the customer will deduct for 'missed off-invoice'
> - If the missed OI deduction is valid (customer, items and dates are correct in the *i*TPM promotion), then use the EXPENSE button on the deduction to expense it to the appropriate GL-account. The *i*TPM KPIs assume off-invoice allowances are applied to qualifying orders. The promotion KPIs for off-invoice already reflect this missed amount that was deducted.
> - If the missed OI deduction is outside *i*TPM validations (customer, items, and / or dates), then you have several options to resolve:
>   - Dispute if it is invalid. REINVOICE if/when repaid.
>   - Use the SETTLEMENT button to match it back to the promotion. This will show an off-invoice OVERPAYMENT for the promotion.

> **Note:** Missed Net-bill amounts that are deducted should be entered as missed-off-invoice.
> If net-bill is the ONLY valid method-of-payment for the promotion, the off-invoice field will NOT be open for settlement amounts:
> - Enter the missed net-bill as a lump-sum.
> - If your net-bill promotion does not have a lump-sum amount, you will need to add a lump sum amount before you will be able to match your missed net-bill deduction to your net-bill promotion. As a NetSuite administrator, edit the promotion and enter a non-zero lump sum. Example, $1. This will make the lump-sum field open for settlements for your promotion.

> **Note:** The fixed price, header level discount and header level surcharge method-of-payments are not included in promotion KPI calculations.

2.9 *i*TPM Off-Invoice applies to all "sub-customers"

Off-invoice promotions are applied to all the sub-customers of the customer in the promotion.

To see the NetSuite customer hierarchy, view the customer record and look for the "sub customers" sublist.

*i*TPM honors the NetSuite customer hierarchy. In the example below…

- Off-invoice for Kroger Corporate applied to sales orders for Kroger Corporate and the 4 sub customers.
- Off-invoice for Kroger Columbus will apply to sales orders for Kroger Columbus, but NOT to Kroger Corporate, and NOT to Fred Meyer, Kroger Ralph's and Peyton.

Parent off-invoice applies to sub-customers

Example promotion is for Kroger Corporate

Off-invoice allowances in a Kroger Corporate promotion will also apply to any sales order any 'children' of Kroger.

2.10 Checkbox: "Any item sold to this customer get this discounts"

There is an option to apply your off-invoice discount to any item sold to the promotion's customer, even if you didn't add the item to the promotion.

To have your off-invoice, net-bill, fixed-price , header discount and header surcharge applied to all items in the sales order, check the "*Any item sold to customer gets this discount*" checkbox under the PLANNING subtab in the promotion.

When discounts are applied to the sales order, *i*TPM verifies that the items in the sales order are also in all the promotions that have this checkbox checked.

If any item isn't in the promotion, *i*TPM waits to apply off-invoice discounts until the items are added to the promotion. While *i*TPM is adding the item, you'll see this banner on the sales order:

After the discount is applied to your sales order, you'll see a new item allowance added under the "Allowances" subtab on the promotion.

In the "Comments" column will be the date and time the item allowance was automatically added.

> ⚠️ **Note:** Be careful with rate-per-unit discounts and the "*Any item sold to this customer get this discount*" checkbox. To correctly apply rate-per-unit discounts, *i*TPM must use the NetSuite unit-of-measure table to calculate the conversion factors. This feature was designed for use with percent discounts. If you have multiple UOMs, then adding an example item with each UOM conversion may allow *i*TPM to use the similar UOM in the sales order.
>
> Monitor item allowances in these promotions where you use rate per unit discounts!

> ℹ️ **Helpful Hint:** This search for new items sold includes all sales orders and invoices with a transaction date, or a last modified date that is in the last two days. [*i*TPM 25.1.1 & newer]

2.11 _i_TPM limitations

> ⚠️ **Note:** These are the limitations when _i_TPM applies off-invoice to sales orders:
> - _i_TPM before version 24.1.1 does not support overlapping fixed-price allowances for an item. _i_TPM does not apply overlapping fixed-price allowances for the same item in a sales order.
> - _i_TPM does not allow you to stack both fixed-price and net-bill allowances on the same sales order: If a sales order has both fixed-price allowances AND net-bill allowances that apply to any item, then _i_TPM will skip ALL of the net-bill allowances for ALL items and ONLY apply the fixed-price allowance.
>
> What you can't do: (for the same item, same customer on a sales order)
> - You can't stack a Fixed-price discount with a net-bill amount.
>   - (Example: Fixed price of $20.00 and a net-bill of $1.00/case.)
> - You can't stack two fixed-price discounts with _i_TPM before version 24.1.1:
>   - (Example: Fixed price of $20.00, and a fixed price of $19.00)
> - You can't stack two net-bill discounts:
>   - (Example: Net-bill of $2.00 and a net-bill of $1.00/case.)
> - A promotion can only have a net-bill or fixed-price discount. To stack off-invoice discounts, create another promotion.
>
> What you CAN do: (for the same item, same customer on a sales order)
> - You can stack one Net-bill discount and any number of off-invoice discounts.
>   - (Example: $2.00 net-bill and $1.00 off-invoice and $.50 off-invoice)
> - You can stack Fixed-price and any number of off-invoice discounts.
>   - (Example: $20.00 fixed-price and $1.00 off-invoice and $.50 off-invoice)
>
> In _i_TPM version 24.2.2, only one header level discount and one level header surcharge will be applied to a sales order. (A future version may allow stacking of multiple header discounts and surcharges.)

Overlapping Fixed price discounts for an item

- _i_TPM 23.2.1 and older versions did not support overlapping fixed-price discounts for the same item in the same sales order.
- For _i_TPM 23.2.1 and newer versions, _i_TPM doesn't know which fixed price is the correct one if there are multiple fixed-price discounts that could apply to an item in a sales order. In the current version of _i_TPM, _i_TPM will apply one of the fixed-price discounts that overlap the item in the sales order.

Find overlapping fixed-price discounts using '*Compare SO, iTPM & EDI Prices*' report on the sales order:

A value of 2 or higher will appear in "the # of Fixed price Deals" column if you have overlapping deals:

SO ITEM	ITEM DESCRIPTION	SO UOM	SO PRICE LEVEL	SO ITEM PRICE	SO DISCOUNTS	SO NET PRICE	CUSTOMER REQUESTED PRICE	ITPM FIXED PRICE	# OF FIXED PRICE DEALS
ACC00010	Telephone Headset	Ea	List Price	17.95	0.00	17.95	0.00		
CAR00007	HP 15 Ink Cartridge - Black	Ea(12/cs)	List Price	24.99	0.00	24.99	0.00		
CAR00008	HP 96A Toner - Black	Ea(12/cs)	List Price	97.95	0.00	97.95	0.00	90.01	2.00

_i_TPM version 20.1.2 and older: Copy sales orders that have _i_TPM discounts already applied

Before August 2021, *i*TPM did not support removing discounts on a sales order that was copied, where the *i*TPM discounts were applied on the sales order before it was copied.

Repricing invoices that already have _i_TPM sales order discounts applied (_i_TPM version 22.1.1 and older)

*i*TPM does not support repricing invoices that have *i*TPM discounts that were applied to the sales order that created the invoice.   If *i*TPM applies discounts to sales orders, *i*TPM does not support removing *i*TPM sales order discounts from the invoice.   *i*TPM 22.2.1 and newer versions do not support applying discounts directly to invoices and RMAs.

> ⚠ **Note:** *i*TPM will apply ALL qualifying off-invoice and net-bill allowances to each item on the sales order, including DUPLICATE OVERLAPPING promotions. Example: Kroger Corporate gets $2.40 OI, and Kroger Columbus has a $3.60 OI. If these allowances were not intended to be stackable, then **MANUALLY DELETE duplicate discount rows caused by incorrect overlapping promotions and other promotional errors.**

> ⚠ **Note:** If you have overlapping fixed-price discounts for the same item in a sales order, in *i*TPM 24.1.1 and newer versions, *i*TPM will apply one of the fixed-price discounts.

> ⚠ **Note: If you change dates, quantity, add or remove items after _i_TPM applied discounts, you need to re-price your order by checking the "_Apply iTPM discounts_".   If EDI changes your sales order _PO type_, you will also need to re-apply _i_TPM discounts.**

> ⚠ **Note: If _expected delivery dates_ are blank on the order, _i_TPM is NOT able to apply off-invoice discounts that are based on order dates**.

> ⚠ **Note: _i_TPM will NOT apply discounts if the line on the order has an error.**   i.e., minimum quantity, etc. In these situations, *i*TPM will NOT create the discount item. Fix the line with the issue and re-apply *i*TPM discounts.

> ⓘ **Helpful Hint:** Kits do not have a unit-of-measure in NetSuite. *i*TPM assumes that unit-of-measure for Kits is 1.0.   You will select a unit-of-measure for your Kit item in the promotion. The rate you enter in the promotion for a Kit will always be the rate in the sales order for the Kit.

3.0 How to Apply iTPM off-invoice discounts

This section shows you how to trigger iTPM to apply off-invoice discounts to your sales order.   If your company uses custom scripts to automatically apply iTPM discounts, this chapter shows you it works.

3.1 First time / New Sales order: "*Apply iTPM Discounts*"

Your organization and the iTPM team will configure iTPM to apply discounts to your sales orders in one or more of these options for sales orders in *PENDING APPROVAL* or *PENDING FULFILLMENT* status:

Option A: iTPM automatically applies Off-invoice to sales order after you click SAVE.

If your sales orders are setup to automatically check the "*Apply iTPM discounts*" checkbox, then no action is needed. Just creating or saving the sales order will trigger applying iTPM discounts.

After you SAVE your sales order, you may see a **banner, "*Please wait while iTPM applies discounts*".**
This banner tells you that the sales order is in a queue to be processed.
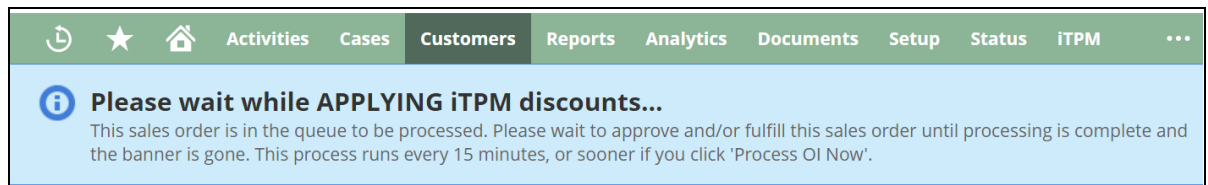
The iTPM script to apply discounts runs every 15 minutes.
Wait to approve or fulfill your sales order until discounts are applied.
You can do other tasks in NetSuite while your sales order is in the queue**.**

- Critical sales order and can't wait? Click the **Process OI now** button.
  If the script isn't running, this button will force the script to run now.
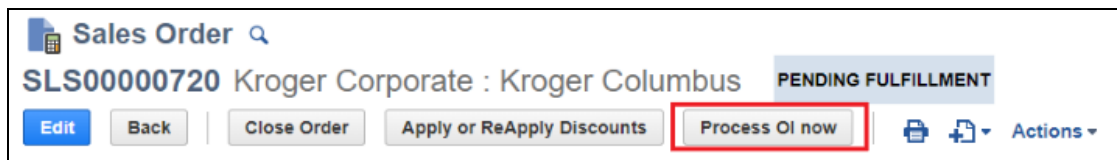
- After the scheduled script runs, there will be no banner, your sales order will have discounts, and the "*- iTPM Discounts Applied*" checkbox will be checked under the iTPM subtab.

No Banner after you SAVE your sales order? There are no discounts to apply.

- If there are no discounts to apply, there will be no banner after you click SAVE.
- '*No Overlapping discounts / override*' is checked under the iTPM subtab on the sales order.
- Your sales order is ready to be approved and/or fulfilled.

Section 3.9 shows you how to confirm discounts are applied to your sales order

Option B: Click the *Apply or ReApply Discounts button* on the sales order.
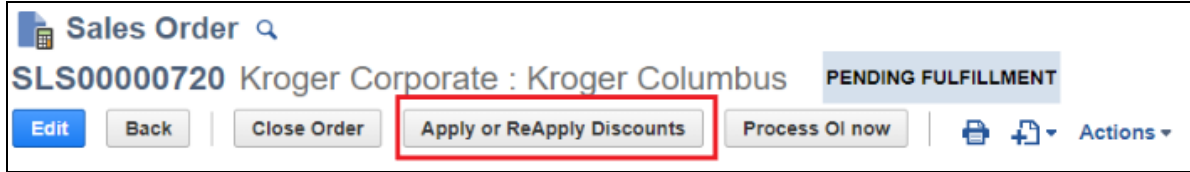
The "*Apply or ReApply Discounts*" button does all the steps outlined in Option C on the next page, but with only one mouse click.

After you click this button ….

- If your sales order form has many custom scripts, you may get an *i*TPM **pop-up form to please wait,** that *i*TPM is still working your sales order.

- If there are overlapping discounts to apply, you will see a **banner, "Please wait…"**

The *i*TPM script to apply discounts runs every 15 minutes.
Wait to approve or fulfill your sales order until discounts are applied.
You can do other tasks in NetSuite while your sales order is in the queue.
Critical sales order and can't wait? Click the **Process OI now** button.
If the script isn't running, this button will force the script to run now.

- If there are **NO overlapping discounts, there will be NO banner** after you click SAVE**.**

  '*No Overlapping discounts / override*' is checked under the *i*TPM subtab on the sales order.
  Your sales order is ready to be approved or fulfilled.

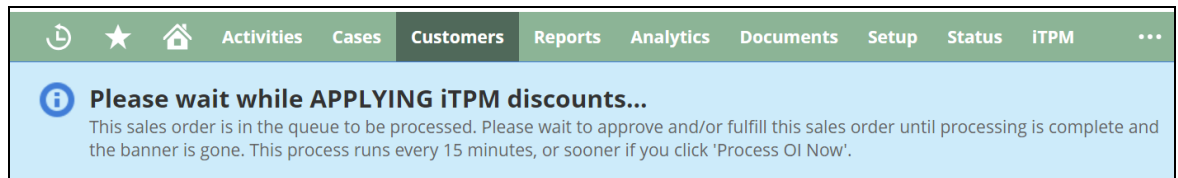Section 3.9 shows you how to confirm discounts are applied to your sales order

Option C: Manually check the "*Apply iTPM discounts*" checkbox on the sales order.

1. **EDIT your sales order.**

2. **Click on the *i*TPM subtab** on the sales order**.**

   (If *i*TPM already applied allowances to the order, *"iTPM Discounts Applied"* checkbox will be checked. See 3.2 Reprice sales order: "Apply iTPM discounts)

3. **Check the box, "*Apply iTPM discounts*"**

Items	Promotions	Address	Shipping	Messages	History	**iTPM**		
☑ APPLY ITPM DISCOUNTS				☐ REMOVE ITPM DISCOUNTS				
☐ ITPM DISCOUNTS APPLIED				☐ NO OVERLAPPING PROMOTIONS / OVERRIDE				

4. **SAVE the sales order.**

   After you click this button ….

   If your sales order form has many custom scripts, you may get an *i*TPM **pop-up form to please wait,** that *i*TPM is still working your sales order.

   - If there are **NO overlapping discounts, there will be NO banner** after you click SAVE**.**

     '*No Overlapping discounts / override*' is checked under the *i*TPM subtab on the sales order.
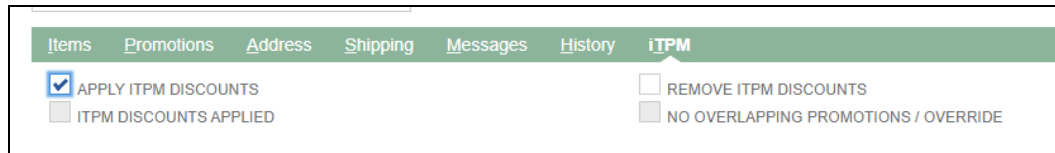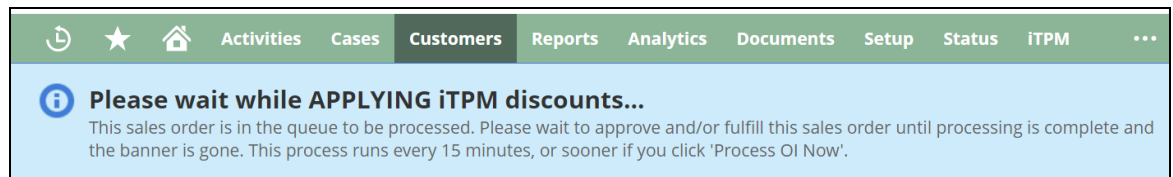   Your sales order is ready to be approved or fulfilled.

   - If there are overlapping discounts to apply, you will see a **banner, "Please wait…"**

🕐 ⭐ 🏠	Activities	Cases	**Customers**	Reports	Analytics	Documents	Setup	Status	iTPM	⋯

   ℹ️ **Please wait while APPLYING iTPM discounts...**
   This sales order is in the queue to be processed. Please wait to approve and/or fulfill this sales order until processing is complete and the banner is gone. This process runs every 15 minutes, or sooner if you click 'Process OI Now'.

   The *i*TPM script to apply discounts runs every 15 minutes.
   Wait to approve or fulfill your sales order until discounts are applied.
   You can do other tasks in NetSuite while your sales order is in the queue.
   Critical sales order and can't wait? Click the **Process OI now** button.
   If the script isn't running, this button will force the script to run now.

   Section 3.9 shows you how to confirm discounts are applied to your sales order

After *i*TPM Applies discounts:

Look for off-invoice allowance rows on your sales order. If there are any promotions that apply, you will see the following when the *i*TPM script is done processing:

- There will be **one or more discount rows** under each item that qualifies for qualifying **off-invoice** allowances. Discounts apply to the item row above the discount row.
- The **net price is changed** if the item qualifies for **NET-BILL** allowances.
- If you already applied *i*TPM discounts to a sales order, *i*TPM automatically removes and reapplies allowances to prevent duplication.
- If there are overlapping header discounts or header surcharges, you will see a sales order subtotal followed by the header allowances.

In the screenshot below, the off-invoice discount applies to the item "CAR00002" directly above it.

ITEM	AVAILABLE	QTY	DESCRIPTION	PRICE LEVEL	PRICE	AMOUNT	TAX CODE	TAX RATE	COMMIT
CAR00002 Brand C size 2	880	10	Brand CAR size 2	List Price	34.95	349.50	-Not Taxable-		Available Qty
Off-invoice			CAR00002, Promotion: OI promotion 2019 10%	Custom	-10.0%	-34.95	-Not Taxable-		

No Overlapping Promotions: When you save the sales order, *i*TPM does a quick search to see if there are any off-invoice promotions that overlap your sales order customer and dates. If there are no overlapping promotions, we know there are no discounts to apply. If there are overlapping promotions, no processing is required if there are no allowances for the items in the sales order. When there are no discounts to apply, you will see the "No overlapping promotions / items/ Override" checkbox under the *i*TPM subtab checked:

Items	Address	Shipping	Messages	History	EFT	Configuration Details	**iTPM**	SuiteSocial	Box Files	iTPM Discounts

- ☐ APPLY ITPM DISCOUNTS
- ☐ ITPM DISCOUNTS APPLIED
- ☐ REMOVE ITPM DISCOUNTS
- ☑ NO OVERLAPPING PROMOTIONS / OVERRIDE
- ☐ SKIP FIXED-PRICE DISCOUNTS FOR THIS SALES ORDER
- ☐ DO NOT APPLY/REMOVE ITPM DISCOUNTS ON THIS SALES ORDER
- ☐ ONLY HEADER LEVEL DISCOUNTS APPLIED

Customer override: If the "Do not apply *i*TPM off-invoice allowances to sales orders" is checked on the customer record, then you will not see the "*Please Wait….*" banner, and you will also see the "No overlapping promotions / override" checkbox checked under the *i*TPM subtab on the sales order.

⚠️ **Note: DO NOT APPROVE THE SALE ORDER for fulfillment until after you have reviewed *i*TPM off invoice allowances and net-bill applied to list price for accuracy.**

⚠️ **Note:** *i*TPM will only apply discounts to sales orders in *open* or *pending fulfillment* status. *i*TPM will **NOT** apply OI to sales orders that are canceled, closed, or billed.

ℹ️ **Helpful hints:**
- *i*TPM Administrators and NetSuite Administrators can view - *iTPM Discount Lo*g and -*iTPM Discount Log Lines* custom records for more detail.
- *i*TPM keeps an audit trail of changes to your sales order. To see *i*TPM changes to your order, use the NetSuite *Audit Trail/Workflow subtab*, and the *Workflow sublist*.

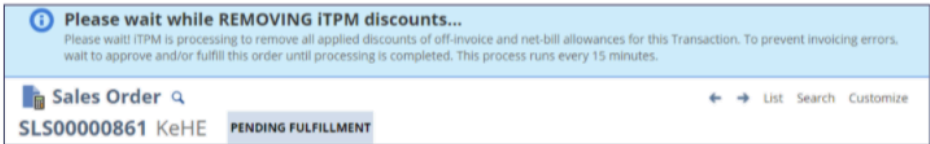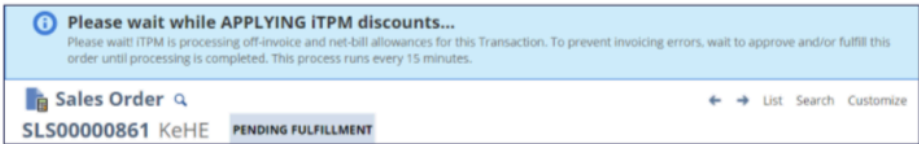## 3.2 Reprice sales order with discounts: "*Apply iTPM discounts*"

Triggering a sales order reprice with *i*TPM discounts is the same as applying discounts the first time:
- Option A: *i*TPM automatically applies Off-invoice to sales order after you click SAVE.
- Option B: Click the Apply or ReApply Discounts button on the sales order.
- Option C: Manually check the "Apply iTPM discounts" checkbox on the sales order.

What is different?
- Before *i*TPM can re-apply discounts, discounts previously applied must be removed.
- *i*TPM does this in two stages… remove discounts, then apply discounts.
- After you save your sales order, you may see a banner that says, "*Please wait while iTPM Removes discounts*".
- If there are no discounts to remove and/or apply, there will be no banner after you click save.
- The *i*TPM script to apply discounts runs every 15 minutes… or run it on demand by clicking the "*Process OI Now*" button on the sales order.

The sales order automatically goes through these stages: (... if there are discounts to remove)

Helpful hints: Set up a NetSuite reminder to show you sales orders that are processing off-invoice, net-bill and fixed-price allowances.

Use the NetSuite *Audit Trail/Workflow subtab*,
and the *Workflow sublist* on the sales order made by *i*TPM.

Additional detail of *i*TPM changes to sales orders is available to NetSuite and *i*TPM administrators, and users with permissions to view the Discount Log and Log lines.

3.3 Remove all *i*TPM discounts

If you want to have *i*TPM remove all discounts that were previously applied, EDIT the sales order and check "*Remove iTPM Discounts*" and save the sales order. The script to remove discounts runs every 15 minutes..

Items	Address	Shipping	Messages	History	EFT	Configuration Details	**iTPM**	SuiteSocial	Box Files	iTPM Discounts

☐ APPLY ITPM DISCOUNTS   ☐ NO OVERLAPPING PROMOTIONS / OVERRIDE   ☐ ONLY HEADER LEVEL DISCOUNTS APPLIED

☑ ITPM DISCOUNTS APPLIED   ☐ SKIP FIXED-PRICE DISCOUNTS FOR THIS SALES ORDER

☐ REMOVE ITPM DISCOUNTS   ☐ DO NOT APPLY/REMOVE ITPM DISCOUNTS ON THIS SALES ORDER

> ℹ️ **Helpful hints: If discounts of Promotions in APPROVED status is applied to a sales order, but then the promotion is "Closed"** *i*TPM will remove the discounts. However, discounts will not be re-applied because the promotion is no longer in Approved status.

3.4 *i*TPM Discounts Subtab

EDI orders can have net-bill and off-invoice allowances already applied to the order. When the order is saved, the *i*TPM subtab will show you what promotions apply to the sales order. **You can use *i*TPM to visually confirm the accuracy of the EDI order before approving the order for fulfillment.**

If the sales order matches three criteria of customer, ship date and item, then qualifying promotions and allowances will be shown in the sublists under the *i*TPM subtab on the sales order.

Click on the *iTPM Discounts* subtab on the sales order to see qualifying allowances for applying or tracking:

Items	Address	Shipping	Messages	History	iTPM	**iTPM Discounts**

PROMOTIONS   OFF-INVOICE   NET-BILL   FIXED PRICE   COMPARE SO, ITPM & EDI PRICES
Report   Report   Report   Report   Report

PROMOTIONS: Use the promotion link to see all promotions that intersect the customer & dates. You will see all promotions that overlap your sales order, including **header discount** and **header surcharge** promotion types.

OFF-INVOICE: This report is filtered to only show off-invoice allowances in the promotions that intersect the customer, and dates. An accurate EDI order will only show these discounts.

NET-BILL: This report is filtered to only show net-bill allowances in the promotions that intersect the customer, and dates. Net-bill discounts are subtracted from the item price, not applied by discount codes.

FIXED PRICE: This report will only show those allowances where the method-of-payment is a fixed price. The EDI order price should match the *i*TPM allowance fixed-price.

COMPARE SO, iTPM & EDI PRICES: This report compares the net item price on the sales order to what the customer requested, and what the price would be if *i*TPM discounts were applied to the sales order. (New in *i*TPM version 21.2.1) Also use this report to find overlapping fixed-price discounts for an item, which is not supported by *i*TPM.

What promotions overlap my sales order?

- View your sales order, and go to the *iTPM_Discounts* subtab.
- Note: This will also show bill-back promotions that overlap your sales order
- Note: Off-invoice is not applied if "*Do not apply iTPM discount to sales orders*" is checked.
- Note: Off-invoice is also not applied if "*Do not apply, just track*" is checked in the *Promotion Type.*
- Click on the Promotions report link to see what promotions overlap your sales order:

The *iTPM_Discounts* subtab is on the sales order.

- Promotion must be child or parent customer of the sales order customer
- Promotion start-end dates must overlap the sales order transaction date
- Promotion must have off-invoice, net-bill or fixed-price discounts.

What allowances overlap my sales order?

- View your sales order, and go to the *iTPM_Discounts* subtab.
- Click on the report links. There are three types of allowances that can overlap your sales order. off-invoice, net-bill and fixed-price. Example below, the "Off-invoice Discounts" report.
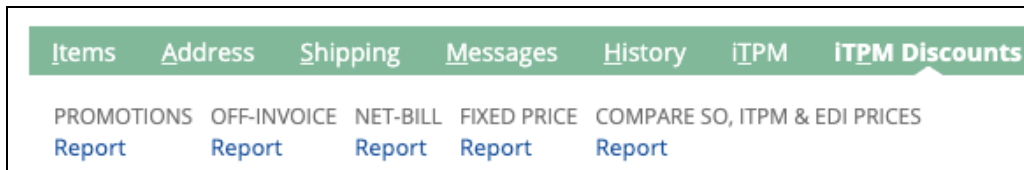
Example Off-invoice discounts Report: This shows overlapping OI discounts by item.

Report Link: *Compare SO, iTPM & EDI Prices*

Report heading: This shows you if there are overrides, and if *i*TPM discounts have been applied.

Sales Order EDI Report

TRANSACTION Sales Order #SLS00000951 **CUSTOMER** Albertsons / Safeway	☐ APPLY ITPM DISCOUNTS ☑ ITPM DISCOUNTS APPLIED ☐ REMOVE ITPM DISCOUNTS	☐ NO OVERLAPPING PROMOTIONS / ITEMS / OVERRIDE ☐ SKIP FIXED-PRICE DISCOUNTS FOR THIS SALES ORDER ☐ DO NOT APPLY/REMOVE ITPM DISCOUNTS ON THIS SALES ORDER ☐ USE SHIP DATE TO APPLY ITPM DISCOUNTS

First 11 rows in the report: This shows you sales order data. The *SO NET PRICE* column shows you the 'dead-net' item price in the order in the unit-of-measure shown in the column, "*SO UOM*". (*Customer requested price* and *Customer price UOM* are optional fields you may not have on your sales orders.)

Sublist ·

ROWS
1 to 5 of 10 ▼

SO ITEM	ITEM DESCRIPTION	SO UOM	SO PRICE LEVEL	SO QUANTITY	ITEM PRICE	SO ITEM PRICE	SO DISCOUNTS	SO NET PRICE	CUSTOMER REQUESTED PRICE	CUSTOMER REQUESTED PRICE ADJ	CUSTOMER PRICE UOM
ACC00010	Telephone Headset	Each	List Price	2	17.95	17.95	2.79	15.15	31.31	31.31	Each
CAR00007	HP 15 Ink Cartridge - Black	Each(12)	List Price	10	24.99	24.99		24.99	24.99	24.99	Each(12)

Last 12 rows in the report: See what *i*TPM discounts are available to be applied to your sales order.

Sublist ·

ROWS
1 to 5 of 10 ▼

CUSTOMER PRICE UOM	ITPM FIXED PRICE	# OF FIXED PRICE DEALS	ITPM OI PER UNIT TOTAL	ITPM OI: %	ITPM OI: RATE PER UNIT	ITPM: NB % DISCOUNT	ITPM: NB RATE PER UNIT	ITPM EXPECTED NET PRICE	CUSTOMER PRICE VS SO	CUSTOMER PRICE VS ITPM	▲ ITPM PRICE VS SO
Each			2.79	10.00%	1.00			15.15	16.16	16.16	0.00
Each(12)							2.00	22.99		2.00	-2.00

ITPM Fixed Price	See the fixed-price discount available for the item
# of Fixed Price Deals	See how many fixed-price discounts overlap the SO. iTPM supports only 1 discount.
iTPM OI per unit Total	This is the total of off-invoice discounts (rate + %) that overlap the item, OI + NB MOP
iTPM OI %	This is the total of all OI percent discount allowances that overlap the sales order
iTPM OI: Rate per unit	This is the total of all OI rate-per-unit discount allowances that overlap the sales order
iTPM: NB% discount	This is the total of all Net-Bill percent discount allowances that overlap the sales order
iTPM: NB rate per unit	This is the total of all Net-Bill rate-per-unit discount allowances that overlap the sales order
iTPM Expected Net Price	This is the expected dead-net item price if all iTPM discounts were applied to the SO.
Customer price vs SO	If this is zero, then the sale order's net price is the same as the customer's requested price
Customer price vs iTPM	If this is zero, then the customer's requested price is the same as what iTPM thinks it should be.
iTPM Price vs SO	If this is zero, then the net price in the sales order is the same as what iTPM thinks it should be.

3.5 Example *i*TPM Discounts

Off-invoice:

These will appear on your sales order as discount items, one row for each off-invoice allowance. The discounts will appear in the rows immediately under each item, and the name of the item being discounted will be in the discount description.

Fixed-price & Net Bill

These discounts when applied to your sales order change the price of items on the sales order. In the example below, *i*TPM applies the fixed-price of $20.00 to the item. Click on the HISTORY link all the way to the right on the item row to view the history and audit log of the change.

Fixed price: *i*TPM replaces the item price in the sales order with the fixed-price in the *i*TPM promotion.

Net-Bill: *i*TPM subtracts the allowance amount from the item's price in the sales order.

Note: Fixed-price and Net-Bill not applied if price level = *Custom*

Limitation: *i*TPM does NOT support overlapping fixed-price discounts for the same item in a sales order.

Header discounts and surcharges:

The last two rows are examples of discounts and surcharges applied once to the sales order.
- *i*TPM method-of-payments include header-discounts and header-surcharges.
- *i*TPM adds a Subtotal to the sales order if your sales order doesn't already have one.
- A header discount is applied to the subtotal, and it reduces the sales order total amount.
- A header surcharge is also applied to the subtotal, but it increases the sales order amount.

Line level discounts like off-invoice can be applied to sales order that also have header discounts and surcharges.

*i*TPM add subtotal to the sales order.

Header Discount applied to the subtotal

Header Discount applied to the subtotal

ITEM	UOM	AVAILABLE	QTY	DESCRIPTION	PRICE LEVEL	PRICE	AMOUNT
CAR00007	Ea(12/cs)	7,978	25	HP 15 Ink Cartridge - Black	List Price	24.99	624.75
Off-invoice				CAR00007, Promotion: Kehe OI Rate per unit Test UOM $0.0833/Each(12)	Custom	-2.0833	-2.08
CAR00008	Ea(12/cs)	117,480	1	HP 96A Toner - Black	List Price	97.95	97.95
Off-invoice				CAR00008, Promotion: Kehe OI Rate per unit Test UOM $0.0833/Each(12)	Custom	-0.0833	-0.08
SUB-TOTAL					Custom		720.54
Example Header Discount				Promotion: 1% defect allowance on everything 1%	Custom	-1.0%	-7.21
Example Header Surcharge				Promotion: $25 handling fee per order $25.0000	Custom	25.00	25.00

Stacking all types of discounts in one sales order:

In the example above, rows labeled "Off-invoice" is an example of discounts applied line-by-line in the sales order.
- Your sales order can contain a combination of line-level AND header level discounts.
- Line level discounts include off-invoice, net-bill, and fixed-price method-of-payments.
- Off-invoice discounts will appear as extra rows under each item, and ONLY apply to the item above.
- Net-bill and Fixed-price discounts will replace the default NetSuite price of the item in the sales order.
- Line-level *i*TPM discount reduces the total amount of the sales order, which in turn also reduces the subtotal of the sales order, which reduces the header-discounts and header surcharges.

⚠ **Note: See Section 2.11** for limitations on stacking fixed-price and header level allowances.

ⓘ **Helpful hints:** In *i*TPM 25.1.1 and later, if *department* is populated in the discount item, it will be populated in the sales order. If *department* is blank in the discount item and *department* is in the item record, *i*TPM will populate the item *department* in the discount item in the sales order.

⚠ ***Note:** *i*TPM 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. *i*TPM uses the native Subtotal, to apply header discounts and subtotals: ID = -2.

*i*TPM

3.6 Why do I sometimes have to wait up to 15 minutes?

Can't wait? Use the "***Process OI now***" button on the sales to apply discounts on demand.

NetSuite has limitations that prevent *i*TPM from applying discounts in real-time.

- After you save your sales order, you will not see a "Please wait…" banner if…
    - If there are no overlapping promotions, you don't have to wait.
    - If there are overlapping promotions, but the items in your sales order are not in those promotions, you don't have to wait.
    - If you have the customer or sales order override that tells *i*TPM to not apply discounts to the sales order, you don't have to wait.
- There can be hundreds, even thousands of item / promotion allowances that overlap a sales order, too many to process in real-time when the order is saved.
- NetSuite governance limits how much processing can be done in real-time when the sales order is saved.
- The map-reduce script that applies off-invoice to sales orders runs every 15 minutes, the shortest cadence allowed by Netsuite
- Critical sales order and can't wait until the script runs again? Click the **Process OI now** button.
  If the script isn't running, you'll see this button and you can force it to run now!
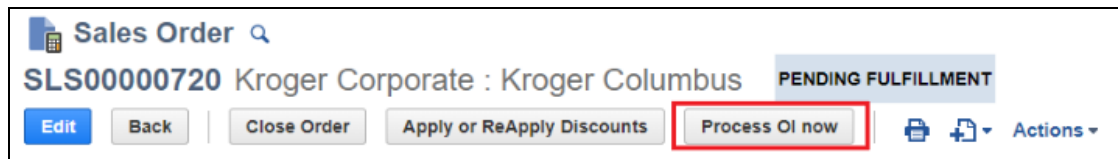
3.7 Can I override *i*TPM discounts?

Yes. You can check the "*Do not apply iTPM discounts*" on the customer record. *i*TPM will not apply discounts on sales orders for the customer, even if there are overlapping promotions and discounts.

You can also override *i*TPM discounts on specific sales orders by checking the "*Do not apply/remove iTPM discounts on this sales order*". This checkbox is under the *i*TPM subtab on the sales order.
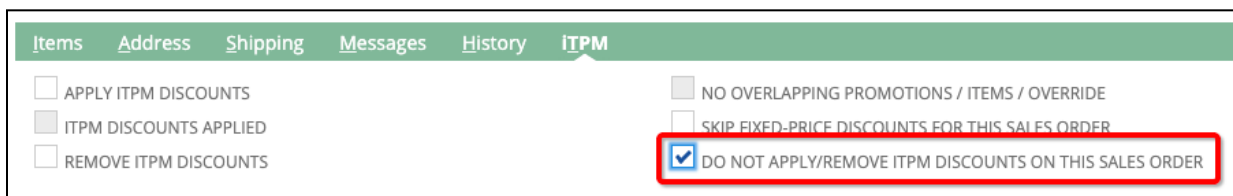
You can also override *i*TPM promotion type and prevent any discounts from being applied to any sales orders for the promotion type.

3.8 Trigger a reprice using the NetSuite Mass-update feature

To reprice a large number of sales orders, use the native NetSuite mass-update feature:
1. Go to *Lists -> Mass Update -> Mass Updates*

2. Expand to see all actions: ⊕ EXPAND ALL | ⊝ COLLAPSE ALL
3. Scroll down, in '*General Updates*' under TRANSACTIONS, click on SALES ORDER in the list.
4. Set STATUS as your mass-update **criteria** for sales orders: (First subtab, Criteria)
   NOTE: *i*TPM only applies discounts to sales orders *Pending Approva*l and *Pending Fulfillment.*

5. Here is the field to mass update to trigger a sales order refresh: (Last subtab, "Mass Update Fields")
   Set the field "*Apply iTPM Discounts*" checkbox to checked.

Preview and click **perform update** to reprice my sales orders in "pending fulfillment" and "pending approval".
Use SuiteAnswers to learn more on this native NetSuite feature.

3.9 Are Discounts Applied to the sales order?

You are viewing a sales order, and there's no banner saying "*Please wait while iTPM applies/removes discounts*." How do you know if discounts were applied?

- Go to the **iTPM subtab** on the sales order.
- If "***iTPM Discounts Applied"*** is checked, then *i*TPM applied to this sales order.
- "Only Header level discounts applied" will be checked if no line level discounts were applied, but header discounts were applied.

Items	Address	Shipping	Messages	History	EFT	Configuration Details	iTPM	SuiteSocial	Box Files	iTPM Discounts

☐ APPLY ITPM DISCOUNTS ☐ NO OVERLAPPING PROMOTIONS / OVERRIDE ■ ONLY HEADER LEVEL DISCOUNTS APPLIED
☑ ITPM DISCOUNTS APPLIED ☐ SKIP FIXED-PRICE DISCOUNTS FOR THIS SALES ORDER
☐ REMOVE ITPM DISCOUNTS ☐ DO NOT APPLY/REMOVE ITPM DISCOUNTS ON THIS SALES ORDER

- If "***No overlapping promotions / override"*** is checked, *i*TPM processed the sales order, but there were no overlapping discounts to apply, or there is an override telling *i*TPM to skip applying discounts.
  The override could be one of the checkboxes under the *i*TPM sub, or it could be a checkbox on the customer record telling *i*TPM to skip apply discounts to all sales orders for this customer.

Items	Address	Shipping	Messages	History	EFT	Configuration Details	iTPM	SuiteSocial	Box Files	iTPM Discounts

☐ APPLY ITPM DISCOUNTS ☑ NO OVERLAPPING PROMOTIONS / OVERRIDE ☐ ONLY HEADER LEVEL DISCOUNTS APPLIED
☐ ITPM DISCOUNTS APPLIED ☐ SKIP FIXED-PRICE DISCOUNTS FOR THIS SALES ORDER
☐ REMOVE ITPM DISCOUNTS ☐ DO NOT APPLY/REMOVE ITPM DISCOUNTS ON THIS SALES ORDER

- If no checkboxes are checked under the *i*TPM subtab, then you know that 1) iTPM did not process the sales order, and 2) you don't know if there are any discounts available to be applied to the sales order.

Items	Billing	Shipping	Gross Profit	Activities	History	Audit Trail/Workflow	Quote Approvals	SO Approval	Configuration Details	EFT	iTPM

☐ APPLY ITPM DISCOUNTS ☐ NO OVERLAPPING PROMOTIONS / OVERRIDE ☐ ONLY HEADER LEVEL DISCOUNTS APPLIED
☐ ITPM DISCOUNTS APPLIED ☐ SKIP FIXED-PRICE DISCOUNTS FOR THIS SALES ORDER
☐ AUTO-CREATE DEDUCTION ON FIRST SAVE? ☐ DO NOT APPLY/REMOVE ITPM DISCOUNTS ON THIS SALES ORDER

- To get more details on overlapping discounts, go to the "**iTPM_Discounts**" subtab on the sales order:

Items	Promotions	Address	Shipping	Messages	History	iTPM	SuiteSocial	iTPM_Discounts

PROMOTIONS Report OFF-INVOICE Report NET-BILL Report FIXED PRICE Report BILL BACK Report COMPARE SO, ITPM & EDI PRICES Report

Report Link	Report Description
Promotions	This shows all of the overlapping promotions with off-invoice allowances
Off-invoice, Net-Bill and Fixed-price	This shows all of the discounts by item that intersect the customer and sales order dates. The report includes all items, even those that are not in the sales order.
Bill-Back	Bill-back discounts are not applied to the sales order. This report is available to help research bill-back questions.
Compare SO, iTPM & EDI prices	Use this to see what discounts by method-of payment are applied to each row in the sales order.

4.0 How to research off-invoice issues

We recommend you start by running the "*Compare SO, EDI and iTPM price*" report under the *iTPM_Discounts* subtab on the sales order. That report has many of the details you'll need to research off-invoice issues.

4.1 Common questions, issues, and what to research

- **Items on sales orders that should have off-invoice discounts but don't**

  - The dates of the promotion must overlap the sales order transaction date, unless the customer is configured to use shipment dates. Then the item's ship date must overlap the promotion's order dates. Promotion ship dates are used if the promotion doesn't have order dates.

  - The item must be in the promotion under the *Allowances* subtab.

  - The promotion must be *approved* status.

  - The promotion must be for the sales order customer, or a customer entity above the sales order customer. Example: Sales order is Kroger Columbus. The promotion can be at Kroger Columbus, or at a level above in the NetSuite customer hierarchy, like Kroger Corporate.

  - Is the missing allowance a 'fixed price' discount? If yes, look for overlapping allowances. If you have more than one fixed-price discount to apply, *i*TPM can only apply one of these discounts. It is possible that *i*TPM applied a fixed-price that is different from the one you want applied.

- **Items on sales orders that have duplicate allowances**

  - The promotion could be at two different levels in the customer hierarchy. For example, you may have created the same promotion for Kroger Columbus AND Kroger Corporate. *i*TPM will apply both promotions to Kroger Columbus sales orders.

  - Look for promotion dates. If one promotion ends on the same day as the next promotion starts, both off-invoice allowances will be applied.

  - You may have two overlapping promotions with a duplicate item discount.

  - Although not done often, It is also possible to put two different discounts on an item in the same promotion. You can search for this under the *allowances* subtab on the promotion.

- **Sales orders that appear to be 'stuck' applying or removing *i*TPM discounts**

  - Is the sales order the correct status? *i*TPM only applies discounts if the sales order status is "Pending Approval" or "Pending Fulfillment". You can check "*Apply iTPM discounts*", but the script will skip over these sales orders. *i*TPM will not uncheck this checkbox.

  - If the sales order has an error that prevents it from being saved, *i*TPM will not be able to apply discounts and the sales order will appear to be stuck because *i*TPM will not be able to save any changes to the sales order.

  - Sales orders in some statuses have workflows that lock the lines. If a promotion in "Approved" status is locked, then *i*TPM will not be able to apply discounts.

4.2 How to view the promotion that created the discount item

You have two ways to track down the promotion to view promotions applied to your sales order:

1. Go the the ***iTPM_Discounts*** subtab on the sales order
2. Click on the Promotions report, and see the promotion #s in the list. Example, promotion 123
3. In the NetSuite global search, type " Prom: 123"

   or...

1. Get the promotion # in the description of the discount item. Example, promotion 345
2. In the NetSuite global search, type " Prom: 345"

4.3 How to review the sales order discount history

1. View the sales order
2. Click on the ***System Information*** subtab
3. In the log you will see the "*Apply iTPM Discounts*" and "*iTPM Discounts Applied*" checked and unchecked as discounts were applied, and then removed and reapplied to the sales order.

4.4 What items have off-invoice discounts active today?

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

You can filter the list to see allowances from *approved*, *active* promotions across all customers.
(Discounts in this saved-search above are also visible in the promotion under the *Allowances* subtab.)

4.5 How to fix a sales order stuck removing *i*TPM Discounts?

Sometimes the sales order can get stuck removing off-invoice discounts. This happens sometimes when a sales order with *i*TPM discounts already applied is copied, or the customer in the sales order is changed.

These are the steps your *i*TPM support team uses to 'fix' the sales order:

1. **Research the sales order** history to identify why it is stuck removing discounts.
   - If any *i*TPM discounts are still in the sales order, EDIT the SO and delete the discount item.
   - Confirm the item prices are correct. Correct the item prices as needed.
2. Copy the **internal ID** of the sales order from the URL while viewing the sales order.
3. Go to *i*TPM -> Admin Tools -> Fix Sales order*
   - This is only visible to the *NetSuite Admin*, and *iTPM Support (Admin)* roles.
   - Paste the internal ID into the ID field
   - If the "*iTPM Applied Discounts*" should be UNCHECKED, then keep this checkbox unchecked.
   - Click SUBMIT
4. **Confirm** the sales order banner changed from "*Please wait, REMOVING…*" to "*Please wait, APPLYING*".

Helpful hints: Email support@cgsquared.com the sales order #, and your *i*TPM support team will perform this task for you as part of your monthly subscription.

4.6 What ship date in the sales order does *i*TPM use to apply Discounts?

If the "*Use ship dates?*" checkbox is checked in the customer record, iTPM uses the native field ID= *shipdate* in the sales order to test if the promotion overlaps the sales order.

5.0 Technical reference

Additional technical information is in the Admin User Guide at www.i-TPM.com/admin-training-resources

5.1 *i*TPM Map Reduce Scripts

These are the scripts that apply *i*TPM off-invoice discounts to sales orders:

Script	Description
customdeploy_itpm_mr_nboi_processing	Applies *i*TPM discounts to sales orders If you use the optimized script, then check the script parameter "Only Process Exceptions"
customdeploy_itpm_mr_new_nboi	This is optimized to process high volumes of sales orders… but it has a limitation of 120 lines in the sales order, including discount lines. This script checks "Exception" in any sales order that can't be processed by this script, so it can be process by the above non-optimized NBOI script.
customdeploy_itpm_mr_nboi_rem_discounts	Removes *i*TPM discounts to sales orders
Custom scripts for your organization (Optional) … or you can use this iTPM script: customdeploy_itpm_ue_so_apply_dis_check See section 2.3 D in the iTPM Install and Release Notes for more details.	Checks the "**Apply *i*TPM Discounts**" checkbox every time the sales order is changed. Your NetSuite sales order can also be customized to default "*Apply iTPM Discounts*" to be checked the first time a sales order is created and saved.

## 5.2 Customizations to auto-apply *i*TPM discounts

You may decide to deploy a customized script that always checks the ""*Apply iTPM Discounts*" checkbox every time the sales order is changed. Contact your *i*TPM support team to discuss this option to deploy the user event script - *iTPM UE Salesorder Apply Discount*.

5.3 Connector / Blacksmith

If you manage promotional contracts in Blacksmith, go to ***iTPM Connector -> Help*** for on-line user guides.

*i*TPM

5.4 Applying Discounts Flow chart

Below is logic used by the NBOI map-reduce scripts to apply *i*TPM discounts to sales orders. (NBOI is short for Net-Bill, Off-Invoice) One script removes the discounts, and a second script applies discounts to the sales order.

Applying iTPM Discounts — Revised October 19, 2024
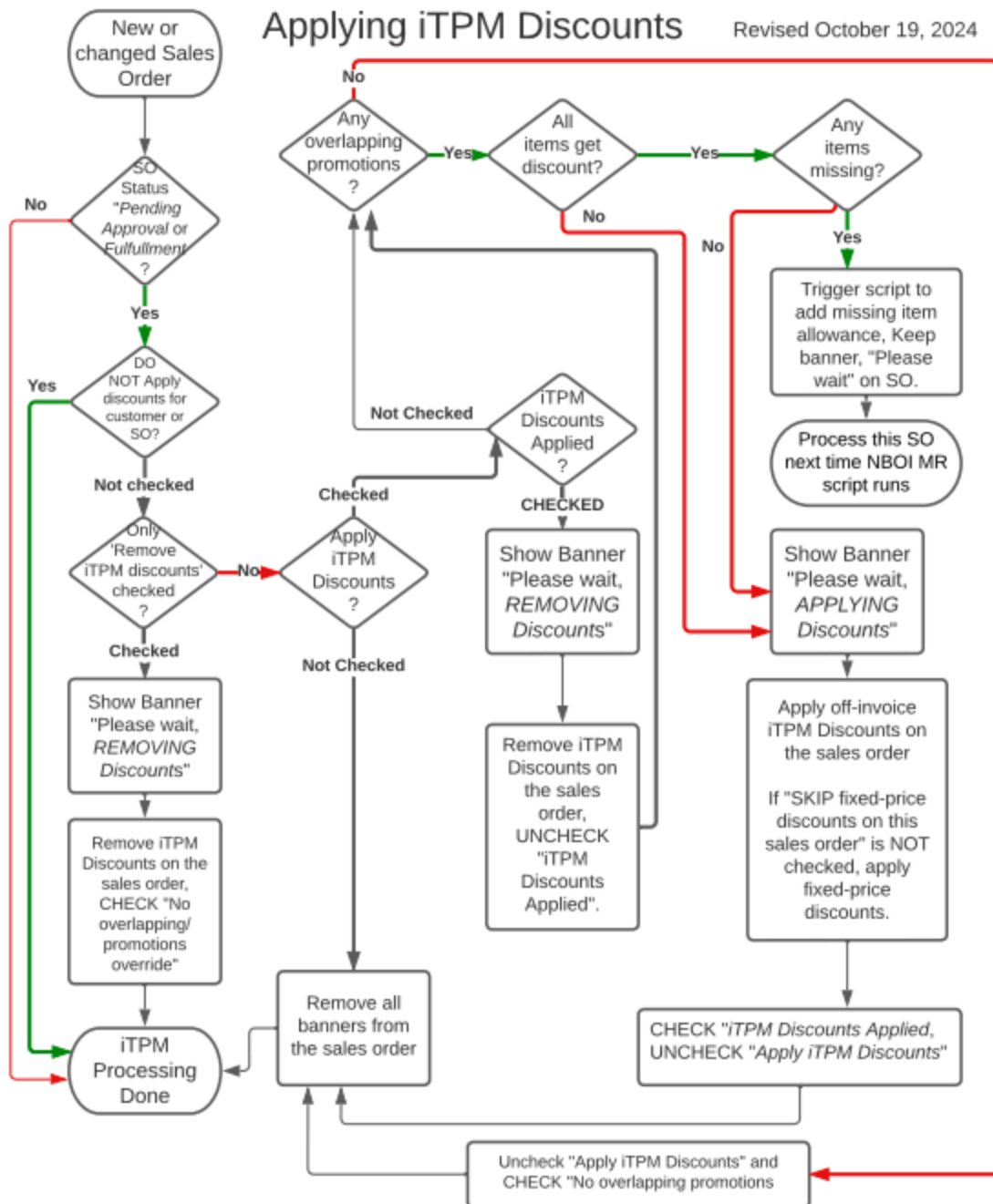
When you save a sales order, this is the logic that's used in real time to decide if the sales order needs to go into the queue to be processed by the map reduce scripts described in the previous page. This logic is used by the NBOI user-event script to UNCHECK the "Apply *i*TPM discounts" checkbox in the sales order if it does not need to be processed.

On SAVE, will the sales order go into the queue
to apply iTPM discounts?

Revised October 23, 2024
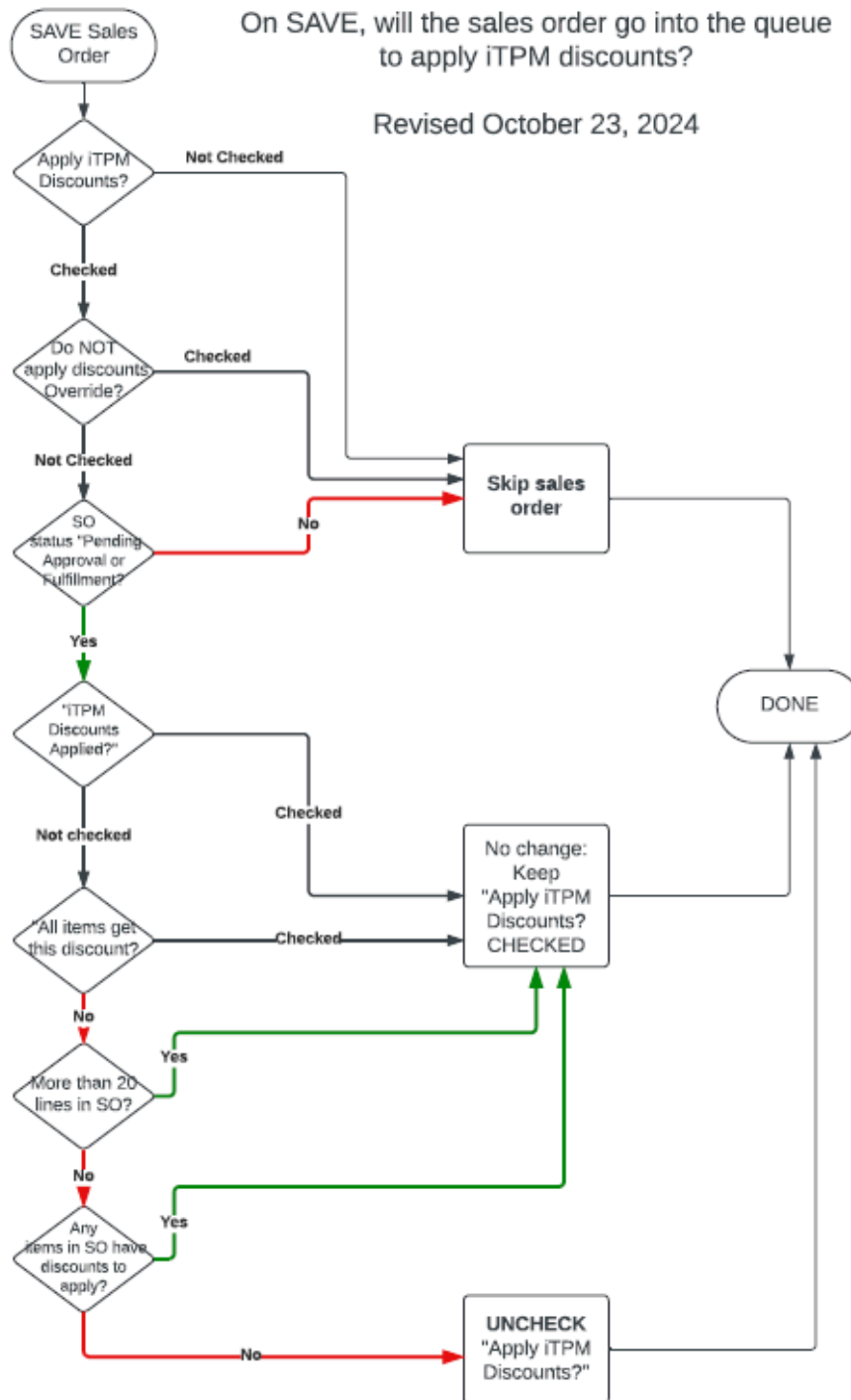
Dates: Controlled by a checkbox on the customer record, "*Use ship dates to apply iTPM discounts*".
- If CHECKED, then apply discounts where the item's ship date is between the start and end dates of the promotion.
- If NOT checked, then apply the discount where the sales order transaction date is between the start and end ORDER dates of the promotion. If order dates are blank, use ship dates.

Customer:
- Sales order customer must match promotion customer, or be a child of the promotion customer
- Check for the optional Off-invoice Override: Apply discounts only if "*Do not apply iTPM discounts*" on the customer record is UNCHECKED

Item:
- The *i*TPM item must match the sales order item   (*i*TPM does not work with Kits. Skip if item type is Kits)
- If rate-per-unit discount, then convert the *i*TPM allowance to the unit-of-measure in the SO.
- If the item in the SO has a CUSTOM price level, do NOT apply any fixed-price and net-bill discounts.
- Each item can get multiple discount items... but can only have ONE fixed-price allowance.

Sales order:
- If "*Do not apply/remove iTPM discounts on this sales order*" is checked, no changes to the SO.

Method of payment:
- If allowance type = "*Off-invoice*", create a discount item.
  - Use a NetSuite discount item in the promotion type.
  - If blank, then use the default discount item in *i*TPM preferences
- If allowance is a Percent Discount, look at *i*TPM Preferences.
- If "*Apply iTPM discounts as a percent*" is CHECKED, then the discount will be a NetSuite percent discount. If UNCHECKED, then *i*TPM will calculate the discount as an amount and the NetSuite discount item will be a rate per unit.
- If FIXED PRICE discount, then save the price in the sales order, and replace it with the fixed-price in the promotion. When removing *i*TPM discounts, restore the item price to the price before *i*TPM applied the fixed-price.
- If a NET BILL discount, then save the price in the sales order, and reduce the item price by the amount of the net-bill. When removing *i*TPM discounts, restore the item price to the price before *i*TPM applied the net-bill-price.
- If "*Skip fixed-price discounts on this sales order*" is checked, do NOT apply or remove any iTPM fixed price discounts on the sales order, but apply/remove any other off-invoice discounts.
- If the item price level is "CUSTOM", iTPM will not change the item price if there is an overlapping fixed-price discount.
- If HEADER DISCOUNT or HEADER SURCHARGE, add a subtotal line to the sales order if it is not already in the sales order. Quantity is always 1, and discount items are applied only to the subtotal line.

Here are the filter conditions to look for overlapping promotions for a sales order:
 Promotions that have discounts that could apply to a sales order meet these conditions:
- The promotion customer must be the same or parent or above the sales order customer, AND
- The promotion must have MOP = off-invoice, OR Net-bill OR Fixed-price,   AND
- The promotion must NOT be inactive, AND
- The promotion dates are used this way:
  - IF customer checkbox "Use ship dates to apply discounts?" is CHECKED, then item ship dates must be equal or in between the promotion order dates (If order dates are blank, use ship dates)
  - IF customer checkbox "Use ship dates to apply discounts?" is NOT checked, then The order transaction date must be equal or in between the promotion order dates (If order dates are blank, use ship dates)

5.4 Understanding checkboxes on the sales order

Below are the combinations of *i*TPM checkboxes on the sales order, and what they mean:

Checkbox on the Sales order	Line Level Discounts Applied to SO.	Only Header Discounts applied to SO.	SO Processed but no discounts to apply.	SO is in the queue to apply discounts.	SO is in the queue to remove and reapply discounts.	User put this SO in the queue to remove discounts.	This is checked by the optimized NBOI script. Too many lines. Process using the non-optimized script. See also script parameter.
Apply iTPM Discounts				Checked	Checked		Checked
iTPM Discounts Applied	Checked				Checked		
Remove iTPM Discounts						Checked	
No overlapping promotions /items /override			Checked				
Only Header level discounts applied		Checked					
Processing Exception							Checked

Override checkboxes on the sales order:

> ***Skip Fixed-Price Discounts for this sales order:*** When checked, no fixed-price discounts will be applied to the sales order when "*Apply iTPM discounts*" is checked. *i*TPM will apply overlapping line level and header level discounts.

> ***Do not apply/remove iTPM discounts on this sales order:*** *i*TPM will not make any changes to the sales order, even when "*Apply iTPM discounts*" is checked.

Items	Address	Shipping	Messages	History	**iTPM**	iTPM Discounts

- ☐ APPLY ITPM DISCOUNTS
- ☑ ITPM DISCOUNTS APPLIED
- ☐ REMOVE ITPM DISCOUNTS

- ☐ NO OVERLAPPING PROMOTIONS / ITEMS / OVERRIDE
- ☐ SKIP FIXED-PRICE DISCOUNTS FOR THIS SALES ORDER
- ☐ DO NOT APPLY/REMOVE ITPM DISCOUNTS ON THIS SALES ORDER

- ☐ ONLY HEADER LEVEL DISCOUNTS APPLIED
- ☐ PROCESSING EXCEPTION

5.5 Option to use optimized map-reduce scripts

If your organization has hundreds of sales orders every day, you have the option to use a new optimized version of the 'NBOI' map-reduce script that applies discounts to sales orders.

The new optimized script is much faster, but can't process as many lines in a sales order as the non-optimized script. If the new script determines that a sales order has too many lines to process, it checks the "Processing Exception" checkbox in the sales order, skips it, and chain-runs the non-optimized script which is slower, but can process many more lines in a sales order.

For more details email support@cgsquared.com.
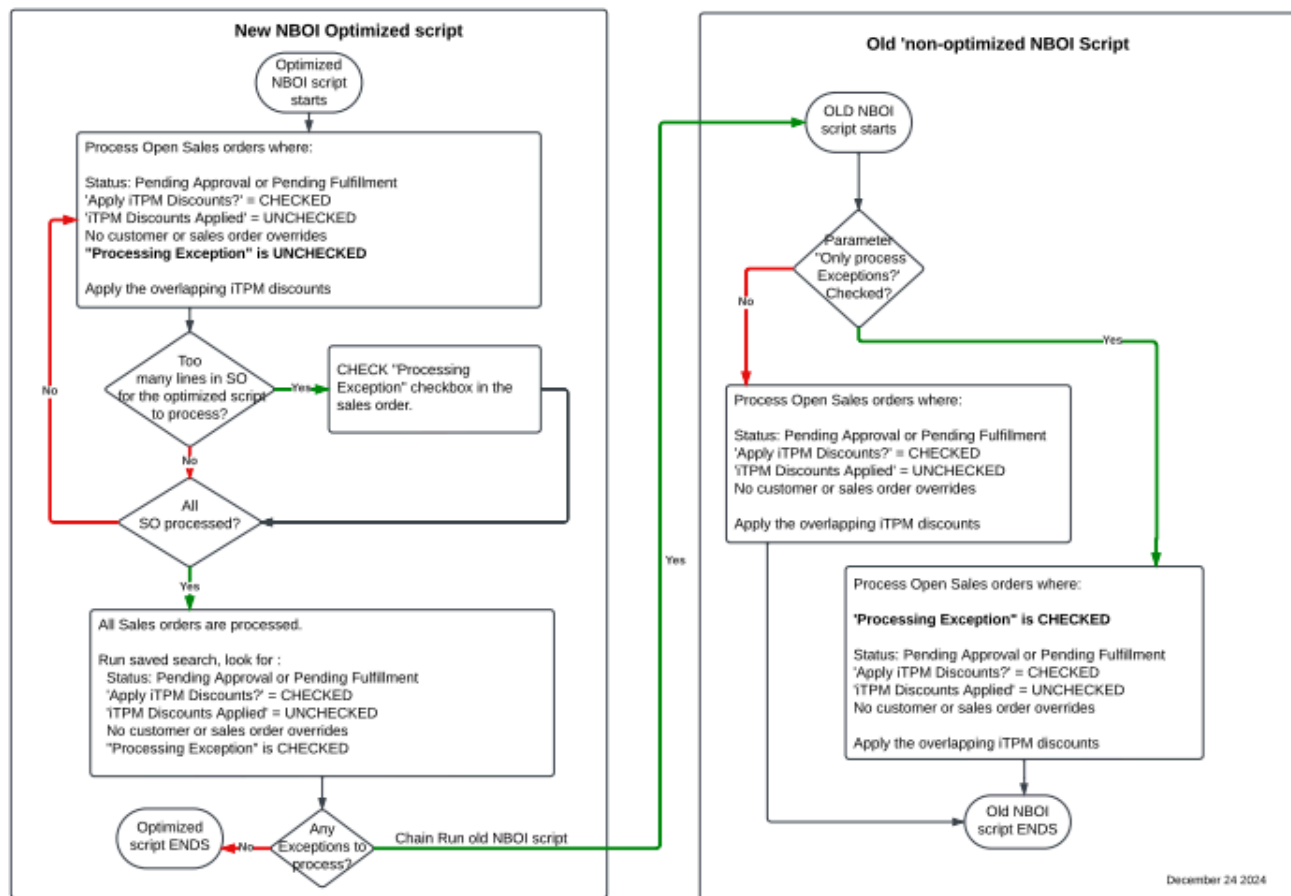
Below is the parameter in the '- *iTPM - MR NBOI Processing*' script that is used to identify the processing exceptions of the new optimized NBOI script:

5.6 Option to configure what date to use as 'ship date'

iTPM defaults to the standard NetSuite ship date called 'Shipdate'. If your organization does not want to use this standard field in the sales order to apply discounts, you have the option to configure *i*TPM to use a different date field in the sales order header record.

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.

*i*TPM 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*

Suitelet script:

iTPM

Map Reduce Scripts:

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

Script Deployment

← →

Edit   **Back**   **Actions**

SCRIPT
- iTPM - MR NBOI Processing

TITLE
- iTPM - MR NBOI Processing (Remove Discounts)

ID
customdeploy_itpm_mr_nboi_rem_discounts

☑ DEPLOYED

STATUS
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

User Event script:

CG Squared, Inc. and this User Guide

CG Squared designs, develops and supports the *i*TPM SuiteApp. CG Squared, or CG², stands for **C**onsumer **G**oods **C**onsulting **G**roup. Our passion and 100% focus is trade promotion for the CG industry. We have more than 30 years experience delivering closed-loop, trade promotion management solutions. CG² is committed to providing you world-class software and services:

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

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

CG² services are bound to the terms of service of the Professional Services Agreement between the parties.

*i*TPM Applying Off-invoice

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

This User Guide is written for the following *i*TPM users:
- Customer service users that manage sales orders
- Supply Chain users that support EDI transactions related to sales orders

This manual has been designed for two-sided printing to save paper if you print this user guide!

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

Because we publish updates to *i*TPM at least twice each year, features and screenshots in this User Guide may not match what you see in *i*TPM. Look for *What's New in iTPM* at www.i-TPM.com/admin-training-resources for release notes on new *i*TPM features and functionality.

The *i*TPM Subscription is bound to the terms of service of the *i*TPM License Agreement between the parties.