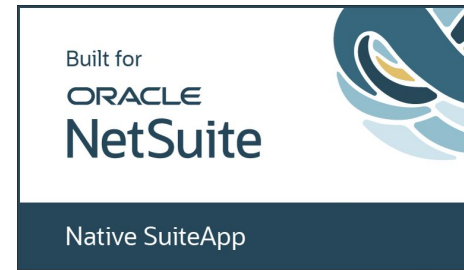


iTPM

25.2.2

Fall 2025 Update Release Notes



BFN Certified every 6 months.

September 2025
Revised September 22, 2025

New Features in iTPM 25.2.2

Settlements & Deductions

- [1.](#) S-07281: New iTPM subtab on bills that shows related settlements to bill.
- [2.](#) S-07104: Option to limit *Settlement Adjustments* to the amount of the linked bill.
- [3.](#) S-07575: Option for EXPENSE button on deduction to post expense journals to the previous month.
- [4.](#) S-07573: Option for BULK EXPENSE, MASS EXPENSE to post the expense JE to the previous period.
- [5.](#) S-05565 Enhancement & optimize the '*Out of balance Deductions*' report.

Accruals

- [6.](#) S-06780: *Daily Allocated Accruals* now update "*Last Accrual Run*" date in the promotion header record.

Promotion Planning

- [7.](#) S-07097: Optimize the *Plan-to-Promotion* script so that it will run in less time

Applying Discounts to Sales Orders

- [8.](#) S-07505: Create a new Markup Method-of-Payment for sales orders, similar to off-invoice discounts.
- [9.](#) S-07723: Optimize and enhance the *Sales Order Price Analysis Report*
- [10.](#) S-07386: Enhance the *Sales Order Price Analysis Report* to include header discounts and surcharges.
- [11.](#) S-07306 NBOI optimized script is now default, with option to easily flip between old and new.

Note: Go to Technical Release notes for 25.2.2 at www.i-TPM.com/admin-training-resources to see a list of the 40+ changes to iTPM in 25.2.2

1. iTPM subtab on bills now shows related settlements to the bill.

- iTPM Settlement

699

APPLIED

Edit

Back

Void

Actions

▼ Primary Information

ENTRY NO.
699

ITPM CUSTOMER
Walmart

ITPM APPLIED TO
Bill #3007

VOIDING SETTLEMENT

ITPM OTHER REFERENCE CODE

DATE
02/18/2025

DEDUCTION OPEN BALANCE

SETTLEMENT ADJUSTMENT

STATUS
Applied

POSTING PERIOD
Feb 2025

DEDUCTION OPEN BALANCE (NET OF TAX)
0.00

TAXABLE

REASON CODE

Bill

3007 In Store Demo Services

OPEN

Credit

Authorize Return

Make Payment

Actions

▼ Primary Information

TRANSACTION NUMBER

CURRENCY
USA

DUE DATE
07/31/2016

REFERENCE NO.
3007

EXCHANGE RATE
1.00

DATE
11/15/2014

VENDOR
In Store Demo Services

DISC. AMT.

POSTING PERIOD
Nov 2014

ACCOUNT
2000 Accounts Payable

DISC. DATE

MEMO
CC-2354

AMOUNT
350.00

☐ PAYMENT HOLD

APPROVAL STATUS
Approved

► Classification

Expenses and Items

Billing

Landed Cost

Relationships

Communication

Related Records

System Information

GL Impact

iTPM

SETTLEMENT RECORD

PROMOTION / DEAL

Related Settlements to Bill

EDIT

DOCUMENT NUMBER

PROMOTION NUMBER

ITPM PROMOTION

ITPM OTHER REFERENCE CODE

OTHER REFERENCE CODE

ITPM AMOUNT

STATUS

Edit

699

2,410

Example promotion

S-03320

100.00

Applied

Benefit:
Quickly see the Settlement Adjustment that's linked to the bill.

i-TPM.com

© 2025 CG Squared, Inc.

[Link to table of contents](#)

25.2.2 Update

3

2. Option to limit *Settlement Adjustment* to the amount of the linked bill

Benefits:

Validation can help prevent entering incorrect settlement amounts that were not deducted but paid directly to the customer.

Note: This is a parameter option in the client script
"- iTPM Settlement Client Methods".

tstdrv1500375.app.netsuite.com says

Warning: Settlement request is greater than the applied-to transaction.

OK

- iTPM Settlement

Save Cancel

Primary Information

ENTRY NO. To Be Generated ITPM CUSTOMER Aldi ITPM APPLIED TO Bill #2991

ITPM OTHER REFERENCE CODE Example validation DATE 09/22/2025 DEDUCTION OPEN BALANCE (NET OF TAX) 0.00

STATUS Processing POSTING PERIOD Sep 2025

Classification

SUBSIDIARY Honeycomb US-East LOCATION

Promotion Detail

ITPM PROMOTION Example daily accrual promotion PROMOTION DESCRIPTION Promotion is 10 days long. Each day, 1/10 should be accrued. SHIP START DATE 04/20/2025 SHIP END DATE 04/29/2025

PROMOTION NUMBER 50,414

Transaction Detail : Enter amount to resolve in this section. iTPM manages the transaction lines.

ESTIMATED SPEND 750.00	ESTIMATED SPEND: LUMP SUM 0.00	ESTIMATED SPEND: BILL-BACK 750.00	ESTIMATED SPEND: OFF-INVOICE 0.00
NET LIABILITY 700.00	NET LIABILITY : LUMP SUM 0.00	NET LIABILITY : BILL-BACK 700.00	NET LIABILITY : OFF-INVOICE 0.00
ITPM AMOUNT 300.00	SETTLEMENT : LUMP SUM 0.00	SETTLEMENT : BILL-BACK 300.00	SETTLEMENT : MISSED OFF-INVOICE 0.00
MEMO	OVERPAY : LUMP SUM 0.00	OVERPAY : BILL-BACK 0.00	OVERPAY : MISSED OFF-INVOICE 0.00

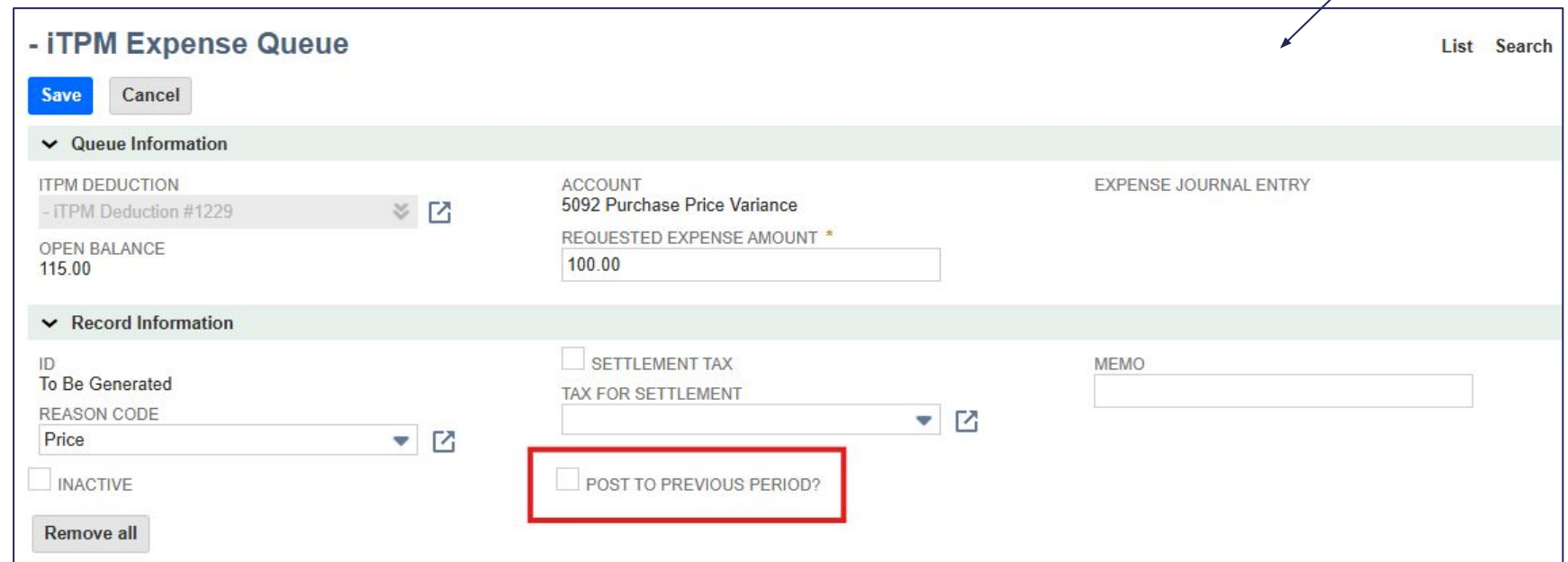
3. Option for EXPENSE button to post expense journals to the previous month.

Benefits: Post non-trade deduction resolutions in the previous month with less effort and steps.

- Check "*Post to previous period*" for the iTPM journal entry to post on the last day of the previous month.
- If last month is locked or closed, the iTPM journal will post in the current month and use today's date.



The screenshot shows the top of the iTPM Deduction interface. At the top left is a blue icon with a yellow coin and the text "- iTPM Deduction". Below this is the number "1229" and a blue "OPEN" button. A row of buttons follows: "Edit" (blue), "Back" (grey), "Non G/L Changes" (grey), "Quick Split" (grey), "Split (CSV)" (grey), "Split" (grey), "Re-Invoice" (grey), "Quick Expense" (grey), and "Expense" (grey). An arrow points from the "Expense" button to the "POST TO PREVIOUS PERIOD?" checkbox in the screenshot below.



The screenshot shows the "iTPM Expense Queue" interface. At the top right are "List" and "Search" links. Below are "Save" (blue) and "Cancel" (grey) buttons. The interface is divided into two main sections: "Queue Information" and "Record Information".

Queue Information:

- ITPM DEDUCTION: - iTPM Deduction #1229 (with a dropdown arrow and an external link icon)
- ACCOUNT: 5092 Purchase Price Variance
- EXPENSE JOURNAL ENTRY
- OPEN BALANCE: 115.00
- REQUESTED EXPENSE AMOUNT *: 100.00 (in a text input field)

Record Information:

- ID: To Be Generated
- REASON CODE: Price (with a dropdown arrow and an external link icon)
- ☐ SETTLEMENT TAX
- TAX FOR SETTLEMENT: (with a dropdown arrow and an external link icon)
- MEMO: (in a text input field)
- ☐ INACTIVE
- ☐ POST TO PREVIOUS PERIOD? (highlighted with a red box)
- Remove all (grey button)

4. ***Bulk Expense, Mass Expense*** option to post expense JE to the previous period.

Benefits: Post non-trade deduction resolutions in the previous month with less effort and steps.

- Check "*Post to previous period*" for the iTPM journal entry to post on the last day of the previous month.
- If last month is locked or closed, the iTPM journal will post in the current month and use today's date.

Submit

Search

Reset

Filters

SUBSIDIARY *

Honeycomb Holdings Inc. : Honeycomb Mfg.

REASONCODE

CUSTOMER

<Type then tab>

ASSIGNTO

REFERENCE CODE

RESEARCH STATUS

NEXT STEPS

DEDUCTION GROUPS

DATE

DATE CREATED

OPEN BALANCE: MIN

0

OPEN BALANCE: MAX

25

REFERENCE DATE

MEMO(MAIN)

DISPUTED?

- All -

CUSTOMER APPROVES REPAY?

- All -

Select one Radio Button Below

☐ REASONCODE

☐ USE EXISTING REASONCODE

MEMO

☒ EXCLUDE OPEN DEDUCTIONS ALREADY IN THE WRITE-OFF QUEUE

☐ POST TO PREVIOUS PERIOD?

Deductions •

Mark All

UnMark All

EXPENSE	DEDUCTION NUMBER	DATE CREATED	CUSTOMER	ORIGINAL AMOUNT	PARENT DEDUCTION	ORIGINAL DEDUCTION	REASON CODE	ITPM OTHER REFERENCE CODE	MEMO	▲ OPEN BALANCE
<input type="checkbox"/>	17	4/30/2018	Kroger Corporate	15.00	- iTPM Deduction #14	- iTPM Deduction #3	Misc Expense	test 12 (changed April 2020)	testing changing the reference code....	15.00
<input type="checkbox"/>	76	8/7/2019	Walmart	213.74	- iTPM Deduction #52	- iTPM Deduction #52		CSV Split	Duplicate claim	13.74
<input type="checkbox"/>	172	6/17/2020	HEB	20.58	- iTPM Deduction #158	- iTPM Deduction #156	Small Balance Write-off	CSV Split Aug 7 2020	Duplicate claim	20.58
<input type="checkbox"/>	195	8/7/2019	Kroger Corporate	21.31	- iTPM Deduction #122	- iTPM Deduction #122	Damages	CSV Split Feb 3	BFN testing Jan 30 2021 D10	21.31
<input type="checkbox"/>	196	8/7/2019	Kroger Corporate	24.58	- iTPM Deduction #122	- iTPM Deduction #122		CSV Split Feb 3	BFN testing Jan 30 2021 D10	24.58

5. Enhance & optimize the '*Out of balance Deductions Report*'

Benefits: New filters make it easier to find any deductions that are out-of-balance
Eliminating the 40 deduction pagination limitation saves time.
Export to Excel for easier analysis.

iTPM -> Reconciliation -> Out of Balance Deductions

Deduction Out-of-Balance Exception Report

[Export All Deductions Out-of-Balance to CSV](#) | [Return to Home](#) | [Apply Filters](#)

▼ Filters

FROM DATE *

08/01/2025

TO DATE *

08/31/2025

PAGE

Page 1 of 1

SORT

Newest to Oldest

SORT BY

Transaction Date

HELP

For more information, refer to section 2.3, step 3D of the [iTPM Data Reconciliation User Guide](#).

Navigate to iTPM → Help → Deduction Management User Guides.

Deduction Out-of-Balance Exceptions

DEDUCTION	DEDUCTION DATE - LAST MODIFIED	DEDUCTION DATE - TRANSACTION DATE	DEDUCTION AMOUNT	OPEN BALANCE STORED	OPEN BALANCE CALCULATED	OPEN BALANCE STORED VS CALCULATED	DEDUCTION STATUS	EXPECTED DEDUCTION STATUS	ISSUE WITH STATUS	SPLIT OFF AMOUNT	DIFFERENCE VS CREDIT MEMO	GL DIFFERENCE VS CREDIT MEMO ▲
-iTPM Deduction #6595	08/28/2025 9:51 am	08/12/2025	1,000.00	900.00	0.00	900.00	Processing	Pending	YES	900.00		NO
-iTPM Deduction #6594	08/29/2025 11:47 pm	08/04/2025	300.00	297.55	-1,701.10	1,998.65	Open	Open	NO	0.00		NO

6. *Daily Allocated Accruals* now show "*Last Financial Accrual Run*" date

Benefits: Fewer mouse clicks to see when the promotion's accruals were last updated.

- iTPM Promotion

Test with 100+ items 2% BB

Edit
Back
Resolve Deductions
Adjust Spend
Refresh KPIs
Copy Promotion
Quick Edit
Modify
Update Estimate
End Promotion

Actions

Promotion Information

SUBSIDIARY CG Squared, Inc. : Honeycomb US-East	PROMOTION TYPE MCBs Direct accts (Sett his accrual, Daily Accruals)	CUSTOMER Walmart	STATUS Approved	CONDITION Active
CURRENCY USA	TITLE / REFERENCE CODE Test with 100+ items 2% BB	PRICE LEVEL Mass Merch	MERCHANDISING TYPES	
OWNER iTPM Demo	PROMOTION # 51236	DESCRIPTION Promotion should accrue about 1/365 every day... or about .002739	PROMOTION ACTIVITY	
OTHER REFERENCE CODE PLAN#		36,500, about 100 each day...		

Promotion Dates

SHIP DATE - START 01/01/2025	SHIP DATE - END 12/31/2025	PERFORMANCE - START 01/01/2025	PERFORMANCE - END 12/31/2025
LENGTH IN WKS - SHIP 52.14		LENGTH IN WKS - PERF 52.14	

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

LAST FINANCIAL ACCRUAL RUN 09/22/2025 6:32 am	EXPECTED LIABILITY : PROMOTIONS 36,582.00	SETTLEMENT	NET LIABILITIES : PROMOTIONS 36,582.00	OVERPAYS : PROMOTIONS 0.00
--	--	------------	---	-------------------------------

Log Summary • Log Detail • Financial Accruals • **Financial Accrual Detail •**

1 to 25 of 70 ▼

EDIT	DATE ▼	PERIOD	TYPE	DOCUMENT NUMBER	ACCOUNT	AMOUNT	EVENT TRIGGER	% ALLOCATION	ACCRUING TRANSACTION	ALLOWANCE UNIT
<a>Edit	09/22/2025	Sep 2025	- iTPM Accrual	8048	4009 Sales : Trade Promotion (contra revenue)	100.00	Daily Event Accrual	72.39%		
<a>Edit	09/21/2025	Sep 2025	- iTPM Accrual	8045	4009 Sales : Trade Promotion (contra	100.00	Daily Event Accrual	72.12%		

7. Optimized *Plan-to-Promotion* script runs faster

Benefits: Less time waiting for promotions to be created or updated from your Excel Planner uploaded event plans.

The screenshot displays the iTPM Plan interface. On the left, the 'iTPM Plan' section shows 'Example Promotion' with buttons for 'Edit', 'Back', and 'Process Event Plans Now' (highlighted with a red box). Below this, the 'Plan Information' section includes fields for SUBSIDIARY, CUSTOMER, PROMOTION TYPE / TEMPLATE, TITLE / REFERENCE CODE, and PROMOTION OWNER. The 'Plan Dates' section shows YEAR, PERIOD START, SHIP DATE START, and SHIP DATE END. The 'Discounts and Lump sum' section includes ITEM, ITEM DISPLAY NAME, ITEM PRICE IN PRIMARY UOM, and % DISC. The 'Estimated Quantity' section includes BASE, INCREMENTAL, % LIFT, and REVENUE.

On the right, the 'iTPM Promotion' section shows 'Example Promotion' with buttons for 'Edit', 'Back', 'Refresh KPIs', 'Copy Promotion', 'Quick Edit', 'Process Plan', 'Submit', 'Void', and 'Actions'. Below this, the 'Promotion Information' section includes fields for SUBSIDIARY, PROMOTION TYPE, CUSTOMER, STATUS, and CONDITION. The 'Promotion Dates' section shows SHIP DATE - START, SHIP DATE - END, and LENGTH IN WKS - SHIP. The 'Planning' section includes tabs for 'Planning', 'Allowances', 'Estimated Quantity', 'Retail Info', 'KPI's', 'Settlements', 'Reports', 'Files', 'Communication', 'Workflow', 'Tasks', 'System Information', 'Accrual', and 'Box Fill'. The 'Monthly forecast' section shows a table with columns for EDIT, ID, ITEM, ITEM DISPLAY NAME, UNIT, MORE DISC?, MOP, %, RATE, BASE, INCREMENTAL, % LIFT, REVENUE, and REDEMPTION.

8. New Markup *Method-of-Payment* for sales orders, similar to off-invoice discounts.

Benefits: Use iTPM promotions to apply markups per line in sales orders.
This can be helpful adjusting sales orders for tariffs and other surcharges.

Markup are
line-level increases
in the sales order.

Items Address Shipping Messages History iTPM iTPM Discounts							
EXCHANGE RATE 1.00							
COUPON CODE							
ITEM	UOM	AVAILABLE	QTY	DESCRIPTION	PRICE LEVEL	PRICE	AMOUNT
ACC00009	Ea	507	1	Panasonic large display with 12 programmable buttons	List Price	375.99	375.99
Off-invoice				ACC00009, Promotion: Example OI Deal 10%	Custom	-10.0%	-37.60
Mark-up				ACC00009, Promotion: Example Mark-up 5%	Custom	5.0%	18.80
ACC00010	Ea	453	2	Telephone Headset	Mass Merch	17.05	34.10
Off-invoice				ACC00010, Promotion: Example OI Deal 10%	Custom	-10.0%	-3.41
Mark-up				ACC00010, Promotion: Example Mark-up \$5.0000/Each	Custom	10.00	10.00

8. New Markup *Method-of-Payment* for sales orders, similar to off-invoice discounts.

- New method-of-payment available for promotion types: Mark-up
- Option to configure a specific NetSuite mark-up item to be used in the sales order.
- Use this MOP in promotions to increase the item's price.

- iTPM Promotion Type ← → List Search

EDLP Mark-up + all dates

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

▼ Primary Promo Information

PROMOTION TYPE DESCRIPTION EDLP Mark-up + all dates	FINANCIAL IMPACT Expense
OTHER REFERENCE CODE	VALID ACCOUNTS 4009 Sales : Trade Promotion (contra revenue)
SUBSIDIARY CG Squared, Inc. : Honeycomb US-East	DEFAULT ACCOUNT 4009 Sales : Trade Promotion (contra revenue)
METHODS OF PAYMENT Mark-up	NUMBER OF DAYS BEFORE AUTOCLOSURE
VALID MERCHANDISING TYPES EDLP	<input type="checkbox"/> USE EVENT ACCRUAL CREDIT GLS IF PROMOTION IS NOT IN THE CURRENT YEAR?

▼ Additional Promo Information

<input checked="" type="checkbox"/> SHOW ORDER DATES?	<input type="checkbox"/> BASE DEAL?
<input checked="" type="checkbox"/> SHOW PERFORMANCE DATES?	<input type="checkbox"/> REQUIRE ESTIMATED QUANTITY?
<input type="checkbox"/> SHOW AT RETAIL?	<input type="checkbox"/> PLAN INCREMENTAL SEPARATE FROM TOTAL?
<input type="checkbox"/> VALID FOR INDIRECTS?	<input checked="" type="checkbox"/> AVAILABLE
<input checked="" type="checkbox"/> ALLOW SETTLEMENTS WHEN PROMOTION IS ACTIVE?	<input checked="" type="checkbox"/> REQUIRE PROMOTION PERIOD SHARE
<input type="checkbox"/> DO NOT UPDATE LIABILITY BASED ON SELL-IN SHIPMENTS	DISCOUNT ITEM FOR OFF-INVOICE
<input type="checkbox"/> TRUE-UP LIABILITY USING SELL-THROUGH DATA	UPCHARGE ITEM FOR OFF-INVOICE Mark-up
<input checked="" type="checkbox"/> APPLY PERCENTAGE ALLOWANCES AS PERCENTAGE DISCOUNTS	INACTIVE ITEM SUBSTITUTION
<input type="checkbox"/> ONLY CREATE KPI AND ALLOWANCE FOR THE FIRST ITEM IN ITEM GROUP?	<input checked="" type="checkbox"/> AUTO APPROVE L1 IF FUTURE CONDITION?
<input type="checkbox"/> TRACK ONLY, DO NOT APPLY OI, NB, FP TO SALES ORDERS	<input type="checkbox"/> PROCESS PLAN TO EXCLUDE ITEMS THAT WERE NOT SOLD IN THE LAST 52 WEEKS
	<input type="checkbox"/> PROCESS PLAN TO INCLUDE MONTHLY BASE FORECAST ITEMS
	<input type="checkbox"/> HEADER LEVEL DISCOUNTS?

Planning [Allowances](#) [Estimated Quantity](#) [Retail Info](#) [KPI's](#) [Settlements](#) [Reports](#) [Files](#)

LS AMOUNT 15,100.00	PLANNED SPEND 0.00	TOTAL PLANNED SPEND 15,100.00
LS ACCOUNT 4009 Sales : Trade Promotion (contra revenue)	ACCOUNT 4009 Sales : Trade Promotion (contra revenue)	<input type="checkbox"/> ANY ITEM SOLD TO CUSTOMER GETS THIS DISCOUNT

- iTPM Promotion Plannings • [Monthly forecast •](#)

VIEW: [Retail View](#) [<Type then tab>](#)

New - iTPM Promotion Planning [Attach](#) [Customize View](#)

EDIT	ITEM ▲	ITEM DISPLAY NAME	UNIT	MOP	%	RATE	BASE	INCREMENT
Edit	ACC00007	Motorola 4450 DSS Console	Each	Mark-up	20.0%	0.00	0	
Edit	ACC00009	Panasonic 5512D Phone	Each	Mark-up	5.0%		350	
Edit	ACC00010	Telephone Headset	Each	Mark-up		5.00	0	

9. Optimized and enhanced Sales Order Price Analysis:

Benefits: Save time finding exceptions to item dead net prices in your sales orders:
Net sales order item price vs. net price with iTPM discounts vs. customer requested price
Easy 'one click' to reapply iTPM discounts to sales orders.
Export to Excel for easier analysis.

Sales Order Price Analysis

Apply iTPM Discounts to Selected Sales Orders

Export to CSV

Apply Filters

Return to Home

Filters

TRANSACTION

<Type & tab for single value>

FROM DATE

09/15/2025

TO DATE

09/22/2025

CUSTOMER

<Type & tab for single value>

PRICE VARIANCE FILTER

Select a Price Variance Filter

SALES ORDER STATUS

Select a Status

HELP

For more information, refer to sections 1.7 and 3.4 in the [iTPM Off-Invoice Discounts User Guide](#).

Navigate to iTPM → Help → Apply Off-Invoice User Guides.

Any line highlighted in this color indicates the iTPM Price is different from the price applied on the Sales Order.

Any line highlighted in this color indicates an "All Item" promotion item allowance has not yet been generated.

Any line highlighted in this color indicates an "All Item" promotion item allowance has not yet been applied to the Sales Order.

Any line highlighted in this color indicates Header Promotions are Available and have not yet been applied to the Sales Order.

Sales Order Price Analysis •

PAGE

Page 1 of 1

Mark All

Unmark All

SELECT	TRANSACTION	CUSTOMER	ITEM	ITEM DESCRIPTION	SO UOM	PRICE LEVEL	QUANTITY	ITEM PRICE	SO ITEM PRICE	SO DISCOUNTS & MARK-UPS	SO NET PRICE	CUSTOMER REQUESTED PRICE	CUSTOMER REQUESTED PRICE ADJ	CUSTOMER PRICE UOM	ITPM FIXED PRICE	# OF FIXED PRICE DEALS	ITPM OI PER UNIT TOTAL
<input type="checkbox"/>	Sales Order #SLS00106438	Metcash	ACC00010	Telephone Headset	Each	List Price	2.0	17.95	26.92	0.000	26.92	0.00	0.00	N/A	0.00	0.00	0.00
<input type="checkbox"/>	Sales Order #SLS00106439	Aldi	NIC00001	Nicorette - Original Gum	Case(48e/cs)	Mass Merch	10.0	9.99	9.49	0.000	9.49	0.00	0.00	N/A	0.00	0.00	1.95
<input type="checkbox"/>	Sales Order #SLS00106440	Aldi	ACC00001	Digital Single Line Telephone (4400) for support calls	Each	List Price	1.0	60.00	60.00	0.000	60.00	0.00	0.00	N/A	0.00	0.00	6.00

Scroll left to see more report measures...

10. Optimized SO Price Analysis report includes header discounts and surcharges.

Benefits: Save time now that the 5 line pagination limitation is removed.
Export to Excel for easier analysis.
Easy navigation between reports.



Sales Order Price Analysis

[Export to CSV](#)[Return to Home](#)[Promotion Report](#)[Off-Invoice Report](#)[Mark-up Report](#)[Net-Bill Report](#)[Fixed Price Report](#)[Header Level Discounts Report](#)[Header Level Surcharges Report](#)

TRANSACTION
Sales Order #SLS00000984

CUSTOMER
Walmart : Walmart - DC1

TRANSACTION CURRENCY
USA

☐ USE SHIP DATE TO APPLY ITPM DISCOUNTS?
☐ DO NOT APPLY ITPM DISCOUNTS TO SALES ORDERS?
☐ NO OVERLAPPING PROMOTIONS / ITEMS / OVERRIDE
☐ SKIP FIXED-PRICE DISCOUNTS FOR THIS SALES ORDER
☐ APPLY ITPM DISCOUNTS
☒ ITPM DISCOUNTS APPLIED
☐ REMOVE ITPM DISCOUNTS

HEADER PROMOTIONS APPLIED AMOUNT
0.00

HEADER PROMOTIONS AVAILABLE TO APPLY
0.00

☐ ATLEAST ONE "ALL ITEM" PROMOTION AVAILABLE
☐ "ALL ITEM" PROMOTIONS APPLIED
☐ "ALL ITEM" PROMOTIONS AVAILABLE TO BE APPLIED

HELP
For more information, refer to sections 1.7 and 3.4 in the [iTPM Off-Invoice Discounts User Guide](#).

Navigate to iTPM → Help → Apply Off-Invoice User Guides.

Any line highlighted in this color indicates the iTPM Price is different from the price applied on the Sales Order.

Any line highlighted in this color indicates an "All Item" promotion item allowance has not yet been generated.

Any line highlighted in this color indicates an "All Item" promotion item allowance has not yet been applied to the Sales Order.

Sales Order Price Analysis •

PAGE
Page 1 of 1

ITEM	ITEM DESCRIPTION	SO UOM	PRICE LEVEL	QUANTITY	ITEM PRICE	SO ITEM PRICE	SO DISCOUNTS & MARK-UPS	SO NET PRICE	CUSTOMER REQUESTED PRICE	CUSTOMER REQUESTED PRICE ADJ	CUSTOMER PRICE UOM	ITPM FIXED PRICE	# OF FIXED PRICE DEALS	ITPM OI PER UNIT TOTAL	ITPM OI: %	ITPM OI: RATE PER UNIT	ITPM MU PER UNIT TOTAL
ACC00009	Panasonic large display with 12 programmable buttons	Each	List Price	1.0	375.99	375.99	-18.800	357.19	0.00	0.00	N/A	0.00	0.00	37.60	10.0%	0.00	18.80
ACC00010	Telephone Headset	Each	Mass Merch	2.0	17.05	17.05	3.295	20.34	0.00	0.00	N/A	0.00	0.00	1.70	10.0%	0.00	5.00

i-TPM.com

© 2025 CG Squared, Inc.

[Link to table of contents](#)

25.2.2 Update

13

11. NBOI optimized script is now the default, with option to flip between old and new.

Benefits: Discounts are applied to sales orders in less time.
If any issues, quickly flip back to the non-optimzied version

Sales Order

SLS00000599 Kroger HO : Kroger King Super **PENDING FULFILLMENT**

[Edit](#) [Back](#) [Close Order](#) [Create Deposit](#) [Print Labels](#) [Fax](#) [Apply or ReApply Discounts](#) [Process OI now](#)

Primary Information

CUSTOMER Kroger HO : Kroger King Super	PROMISE DATE 3/23/2025
ORDER # SLS00000599	LOCATION 01: San Francisco
PO #	CLASS
TERMS Net 30	DEPARTMENT
DATE 3/19/2025	

Summary	
SUBTOTAL	1,727.96
TAX	0.00
SHIPPING COST	
HANDLING COST	
TOTAL	1,727.96

Drop files here. Click for more options.

Script Deployment

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

SCRIPT
- iTPM Button on Sales order

APPLIES TO
Sales Order

ID
customdeploy_itpm_btn_on_salesorder

☒ DEPLOYED

[Audience](#) • [Scripts](#) • [Parameters](#) • [Context Filtering](#)

☒ RUN OPTIMIZED NBOI MR (REMOVAL & ADD)

To revert to the non-optimized scripts to apply discounts:

- Unschedule the optimized MR script, schedule the old script
- Check the 'Run Optimized NBOI' checkbox in the UE script parameter.

Non-optimized:
- iTPM - MR NBOI Processing
customdeploy_itpm_mr_nboi_rem_discounts

Optimized:
- iTPM | OPT | NBOI Processing | MR
customdeploy_itpm_opt_nboi_remove_mr

Update Schedule

The next update is tentatively scheduled for Winter **2024**.

iTPM Anticipated Releases	Anticipated Date Generally Available*
'Minor' Updates 23.2.x	As needed. Release date and enhancements may change based on client needs and requests.
'Major' Release 24.1.1	Winter 2024. Release date and enhancements may change based on client needs and requests.

* Subject to change

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