Integrated Trade Promotion Management

Built for
ORACLE
NetSuite

Native SuiteApp
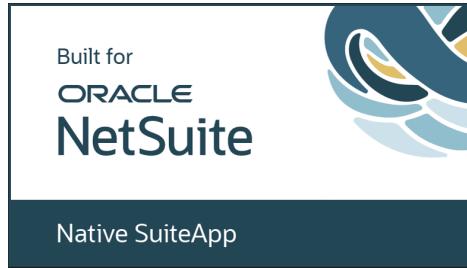
User Guide:

Annual Promotion Planning

January 2026

Revised January 3, 2025
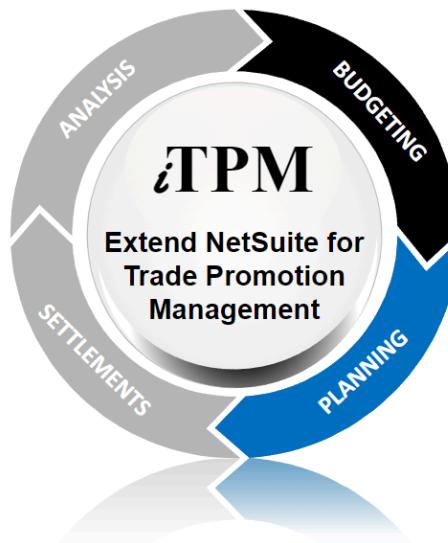
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support@CGsquared.com

*i*TPM

Table of Contents

> ℹ️ **Helpful Hint:** When viewing this as a PDF, click on the topic or page number to go directly to that section. To get back to the Table of Contents, click on *User Guide: Annual Planning* at the top of the page. Also available at the bottom of each page: *Quick Reference: iTPM PROMOTIONS*

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> **ⓘ** **Helpful hint:** Get a summary of what's new in this version of *i*TPM.
>
> Go to www.i-TPM.com/see-what-is-new-in-iTPM to see what's new.
>
> In NetSuite, go to ***iTPM -> Help -> See what is new in iTPM***

*i*TPM

Quick Reference: *i*TPM Annual Planning

HELP! Email questions & issues to support@cgsquared.com
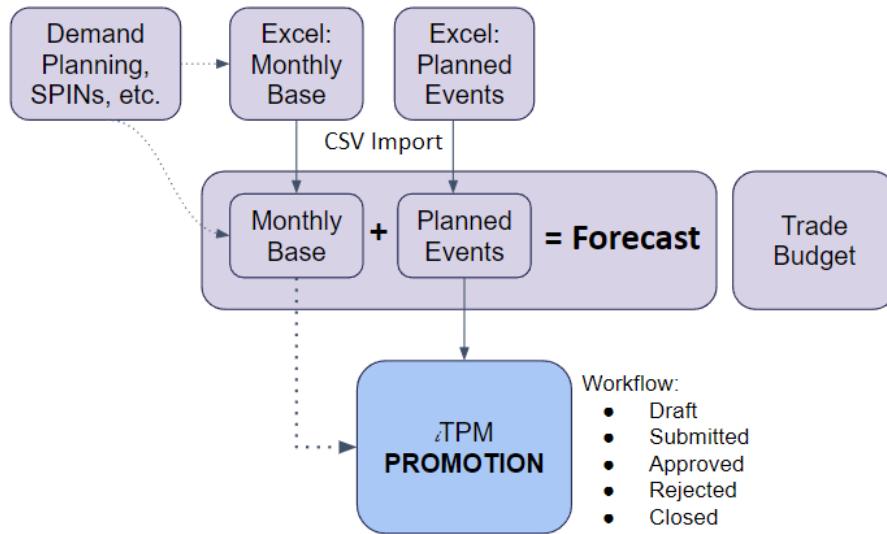
Step 1: Forecast your Monthly Base Volume (Optional, not required)
- Plan your monthly base volume by customer, period and item or item group.
  (Option to do this in NetSuite, or in Excel and then CSV import)
- Leverage third-party data like SPINS, IRI, AC Nielsen, and demand planning tools.
- Option to start your Monthly Base Forecast in Excel, then use CSV import.

Step 2: Create Planned Events   (Optional. Skip this and directly create your promotion.)
- Plan your events with fewer restrictions and required fields.
  Note: These are not *i*TPM promotions until Step 4.
- Base volume defaults saves mouse clicks.
- Option to start your Event Plans in Excel, then use CSV import.

Step 3: Reporting: Forecast Roll-ups in NetSuite Workbooks (or in your BI tool)
- Review your annual forecasted plan in revenue, units, and total trade spend
- Forecast Revenue or volume = Base revenue + Incremental Revenue from events
- Annual Plan can include both direct and indirect customers.

Step 4: Create and/or update promotions from your planned Events
- *i*TPM will validate your planned event data, and provide defaults where possible
- Identify the plans you want to convert into *i*TPM promotion
- Option to automatically run Process Plan on the newly created promotions

Step 5: Submit and Approve your promotions
- Use the workflow buttons on the promotion to submit and approve your promotions.
- Option: Mass-Approve promotions. You can go directly from *Draft* to *Approved* status.

1.0 Base Forecast

If you choose to manually enter a base forecast, each monthly base forecast record includes three values:
- Revenue: By month, this is what you expect to sell without promotions
- Units: By month, these are the units you expect to sell without promotions in the selected unit-of-measure.
- Price: This is the anticipated price for the item in the unit-of-measure. Option to enter by month or just once for the entire year.

There is a view that allows you to focus on one of these measures, revenue, units or price:

Revenue: This view shows you months 1 through 12 of your monthly base revenue:

- iTPM Monthly Base forecast List

VIEW Revenue ▼   **Edit View**   **New - iTPM Monthly Base forecast**

➕ FILTERS

☐ SHOW INACTIVES | EDIT ⬭✕
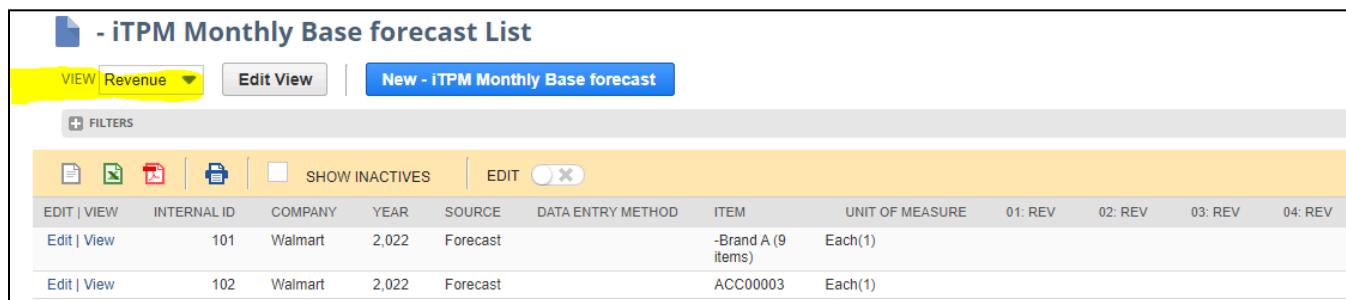
EDIT | VIEW	INTERNAL ID	COMPANY	YEAR	SOURCE	DATA ENTRY METHOD	ITEM	UNIT OF MEASURE	01: REV	02: REV	03: REV	04: REV
Edit | View	101	Walmart	2,022	Forecast		-Brand A (9 items)	Each(1)				
Edit | View	102	Walmart	2,022	Forecast		ACC00003	Each(1)				

Units: This view shows you months 1 through 12 of your monthly base in the UOM you select.
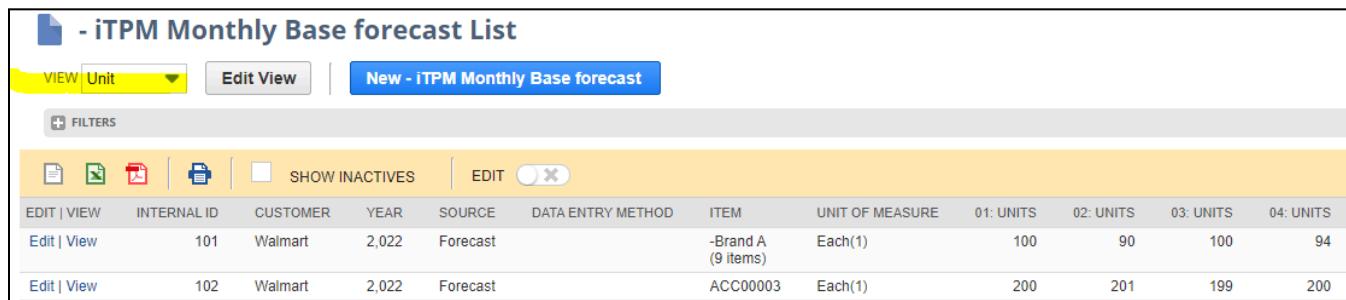
- iTPM Monthly Base forecast List

VIEW Unit ▼   **Edit View**   **New - iTPM Monthly Base forecast**

➕ FILTERS

☐ SHOW INACTIVES | EDIT ⬭✕

EDIT | VIEW	INTERNAL ID	CUSTOMER	YEAR	SOURCE	DATA ENTRY METHOD	ITEM	UNIT OF MEASURE	01: UNITS	02: UNITS	03: UNITS	04: UNITS
Edit | View	101	Walmart	2,022	Forecast		-Brand A (9 items)	Each(1)	100	90	100	94
Edit | View	102	Walmart	2,022	Forecast		ACC00003	Each(1)	200	201	199	200

Price: This view shows you the current item price and months 1 through 12 of your price for each item.

- iTPM Monthly Base forecast List

VIEW Price ▼   **Edit View**   **New - iTPM Monthly Base forecast**

➕ FILTERS

☐ SHOW INACTIVES | EDIT ⬭✕
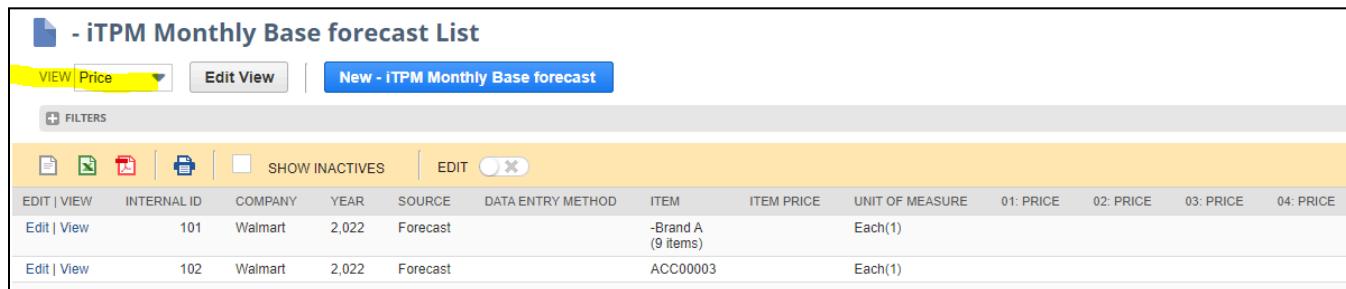
EDIT | VIEW	INTERNAL ID	COMPANY	YEAR	SOURCE	DATA ENTRY METHOD	ITEM	ITEM PRICE	UNIT OF MEASURE	01: PRICE	02: PRICE	03: PRICE	04: PRICE
Edit | View	101	Walmart	2,022	Forecast		-Brand A (9 items)		Each(1)				
Edit | View	102	Walmart	2,022	Forecast		ACC00003		Each(1)				

ⓘ **Helpful Hint:** You have the option for *i*TPM to enter only units or revenue, and let *i*TPM calculate the other value. See section 1.5 Data entry options for Monthly Forecast Base for more information.

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1.1 Create your monthly base forecast

You have the option to enter your your monthly base forecast in Excel and then use the NetSuite CSV import to upload your forecast into NetSuite: (skip if you start inside NetSuite)

- 6.1 Populate the Excel Monthly Base Template
- 6.2 Import your CSV monthly base forecast

To create a new monthly base forecast directly in NetSuite to **Annual Plan -> Monthly Base -> New**
To decide what data values to enter, go to 1.5 Data entry options for Monthly Forecast Base .

If you select a direct customer that has actual shipments in NetSuite, you can use the "*Items sold last 52 weeks*" to help you compare your forecast to historical sales to this customer. (This is similar to sublists under the Planning subtab in the promotion.)

Sum of Quantity: This is the total of all sales to this customer for this item from today's date back 52 weeks.
Sum of 52 weeks average: This divides the sum by 52 to give you an estimated weekly sales for the item.

ITEM ▲	DISPLAY NAME	UNITS	SUM OF QUANTITY	SUM OF 52 WEEK AVERAGE
ACC00002	Merlin 4400 Phone	Each	10	0.19
ACC00009	Panasonic 5512D Phone	Each	1	0.02
ACC00010	Telephone Headset	Each	2	0.04
Total			**13.0**	**0.25**

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www.i-tpm.com
Quick Reference Link: *i*TPM Annual Planning

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1.2 Review your Monthly Base Forecast

After you upload your forecast from Excel or enter it manually, it will be available to view in NetSuite.
To view your monthly forecast,

- Go to *iTPM -> Annual Planning -> Monthly Base*
- Change your view to either *UNITS, REVENUE* or *PRICE*.
- Click VIEW on any row to see all of the monthly values for a customer, year and item.

Depending on your screen resolution, you may need to scroll right to see all of the months.

EDIT | VIEW	INTERNAL ID	CUSTOMER	YEAR	SOURCE	DATA ENTRY METHOD	ITEM	UNIT OF MEASURE	01: UNITS	02: UNITS	03: UNITS	04: UNITS
Edit | View	101	Walmart	2,022	Forecast		-Brand A (9 items)	Each(1)	100	90	100	94
Edit | View	102	Walmart	2,022	Forecast		ACC00003	Each(1)	200	201	199	200
Edit | View	103	Walmart	2,022	Forecast		ACC00004	Each(1)	10	10	10	10
Edit | View	104	Walmart	2,022	Forecast		ACC00008	Each(1)	15	15	15	15

1.3 Option to use base forecast in Event Plans

You have the option for *i*TPM to use the base forecast to calculate a base for your Event Plan. You can enter just your estimated % Lift, and *i*TPM will populate a default base volume using the promotion dates and your monthly base forecast. See section 2.7 Calculated Base for more details.

## 1.4 Monthly Base is linked to your promotions

The Monthly Base Forecast is visible under the Planning subtab on the promotion. Look for the Monthly Forecast sublist. Depending on your screen resolution, you may need to scroll right to see all the months.

EDIT	CUSTOMER ▲	YEAR	ITEM	SOURCE	UNIT OF MEASURE	01: UNITS	02: UNITS	03: UNITS	04: UNITS	05: UNITS
Edit	Aldi	2,022	-ACC group C (7 items)		Each	200	200	200	200	200
Edit	Aldi	2,023	-Brand A (7 items)	Data Entry	Each	35	35	35	35	35

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1.5 Data entry options for Monthly Forecast Base

You don't have to CSV import or enter all three data values by month. You have the option to enter some of the values and let *i*TPM calculate the other values:

This is done in 'real time' every time you save your Monthly Forecast Base.

DATA ENTRY METHOD

Calculate Revenue ▼
- New -
Calculate Revenue
Calculate Units
Calculate Price
Data entry
Spread Units Calculate Revenue
Spread Revenue Calculate Units
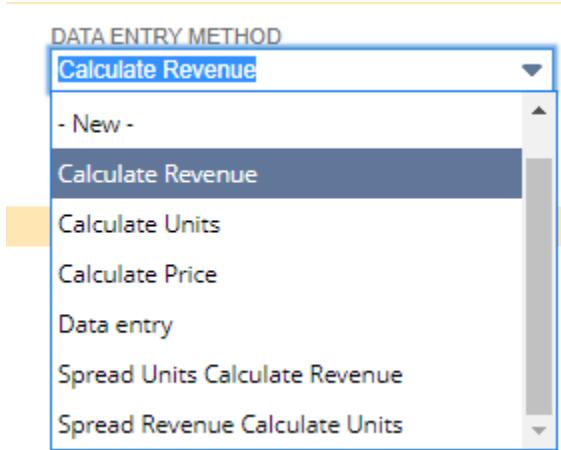
Data Entry Method	Description
Calculate Revenue	Enter Units. If you don't enter price, then iTPM uses the current price of the item. Revenue = Units times item price
Calculate Units	Enter Revenue.If you don't enter price, then iTPM uses the current price of the item. Units = Revenue / item price
Calculate Price	Enter Units and Revenue. Price = Revenue / Units
Data entry	*i*TPM does not change or populate any values in the Monthly Forecast.
Spread Units, Calculate Revenue	Enter Units only for the Year. *i*TPM spreads your annual total units evenly across all the months, and then calculates revenue. If you don't enter price, then *i*TPM uses the current price of the item. Revenue = Units times item price
Spread Revenue, Calculate Units	Enter Revenue only for the Year. *i*TPM spreads your annual total revenue evenly across all the months, and then calculates units. If you don't enter price, then *i*TPM uses the current price of the item. Units = Revenue / item price

ⓘ **Helpful Hint:** If *i*TPM calculated some of your measures, but now you don't want iTPM to make any changes, simply change the data entry method to "*Data entry*".

*i*TPM

1.6 What data source to use for your calculated base?

If you have monthly data in NetSuite from multiple sources, or perhaps you store multiple versions of your monthly base forecast, you can use the "Don't use this calculate base" to tell iTPM which base forecast to use for the calculated base in Event plans.

Helpful Hint: You also have the option to exclude some of your monthly base records in NetSuite workbooks and for roll-up reporting by unchecking the "*Include in roll-up totals?*" checkbox.

You can create a monthly base that overlaps other records. Example, base by item and another item group that includes the same items. This gives you more flexibility in planning, but can create duplicate forecasts. Uncheck the "*Include in roll-up totals?*" checkbox in base forecasts to prevent duplicates in your roll-up reporting.

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2.0 Planned Events

Each Event plan is a customer and item or item group that will receive a discount for a specific time period.
Each Event plan can become a promotion, or similar event plans can be combined into one promotion.

2.1 Create your Event Plans

You have the option to start in Excel and upload your event plans into NetSuite:: (skip if you start inside NetSuite)
- 6.5 Populate the Excel Event Plan Template
- 6.6 Import your CSV Event Plan file

To create Event Plans directly in NetSuite go **to *iTPM Annual Plan -> Event Plans -> New***

After you save your Event Plan, you can view your monthly base forecast in the "*Base Forecast*" subtab:

> **Helpful Hint:** You will have the option for *i*TPM to automatically use your monthly base forecast to calculate and populate your base volume in your Plan. See 2.7 Calculated Base for more information.

*i*TPM

2.2 One item per promotion, or multiple items per promotion?

You have the option to create one promotion with multiple items and item groups. Grouping Event Plans creates fewer promotions and can make it easier for the finance team to match customer deductions to promotions.

To do this, you'll use the "*Group Plans with this title?*" checkbox.   (This is checked by default)

- iTPM Plan

CSV import July 4

Edit | Back | Process Event Plans Now | 🖨 | ↩ Actions

∨ Plan Information

SUBSIDIARY	CUSTOMER	PROMOTION TYPE / TEMPLATE	TITLE / REFERENCE CODE	PROMOTION OWNER
CG Squared, Inc. : Honeycomb US-East	Aldi	MCB (direct accounts)	CSV import July 4	iTPM Demo
	PRICE LEVEL	PLAN APPROVAL STATUS	OTHER REFERENCE CODE	☐ REMOVE ITEM FROM PROMOTION?
EVENT PLAN #	List Price			☐ DELETE PROMOTION?
1134	CURRENCY	☑ GROUP PLANS WITH THIS TITLE?	PROMOTION DESCRIPTION	☐ IGNORE?
PROMOTION # PLANNING #	USA	☐ VALIDATE DATA?		☐ THIS IS A DUPLICATE
29750		☐ RUN PROCESS PLAN?		☐ FLAG DUPLICATES IGNORE?
PROCESSING STATUS				

Event Plans can only be grouped if Customer, Promotion Type AND Promotion Dates are all the same.

If the Event Plan you are viewing can be combined with one or more items, you will see a banner:

ⓘ INFORMATION
There are other plans wth for the same customer, promotion type, plan title and dates. Check 'Group all plans wth this title' if you want all these plans in the same promotion. Unchecked, each of these plans will be a separate iTPM promotion.

- iTPM Plan   ← → List Search

CSV import July 4

The "*Other Plans in this group*" subtab shows you all Event Plans that will be combined into a promotion if you create your promotions with "*Group Plans with this title?"* checked.

NOTE: The lump sum in the promotion will be the total of the lump sum from every Event Plan in the promotion.

| Base Forecast | Workflow | System Notes | User Notes | **Other Plans in this group** | All event plans for this customer | | | | | | | | |

PLANID	PLAN TITLE	CUSTOMER	PROMOTION TYPE	SHIP DATE START	SHIP DATE END	ITEM	ITEM DISPLAY NAME	LUMP SUM	% DISCOUNT	RATE	GROUP	PLAN SPEND	TOTAL PLAN SPEND
1134	CSV import July 4	Aldi	MCB (direct accounts)	04/01/2023	04/30/2023	ACC00007	Motorola 4450 DSS Console	100.00	0.0%	11.00		1,100.00	1,200.00
1035	CSV import July 4	Aldi	MCB (direct accounts)	04/01/2023	04/30/2023	ACC00004	Merlin 4412D+ Phone	122.00	0.0%	11.00	Yes	1,100.00	1,222.00

In the example above, one promotion is created with three promotion planning records:

- iTPM Promotion Plannings ▾ 52 Week Items ▾ 52 Wk Items (Parent) Monthly forcast ▾

VIEW   - iTPM PROMOTION PLANNING
Default View ▼   - iTPM PROMOTION PLANNING   ⇕ ⊡

New - iTPM Promotion Planning | Attach | Customize View

EDIT	ID	ITEM ▲	ITEM DISPLAY NAME	UNIT	MORE DISC?	MOP	%	RATE	BASE	INCREMENTAL	% LIFT	REVENUE	REDEMPTION	PLANNED SPEND	EVERYDAY PRICE	MERCH PRICE	ACV W/DISPLAY	ACTIVITY	PROCESSED?	PROCESSING
Edit	iTPM_PP2283	ACC00002	Merlin 4400 Phone	Each	No	Bill-Back	0.0%	11.00	100	0	0.0%	0.00	100.0%	0.00					No	From plan 1034
Edit	iTPM_PP2284	ACC00004	Merlin 4412D+ Phone	Each	No	Bill-Back	0.0%	11.00	100	0	0.0%	0.00	100.0%	0.00					No	From plan 1035
Edit	iTPM_PP2285	ACC00007	Motorola 4450 DSS Console	Each	No	Bill-Back	0.0%	11.00	100	0	0.0%	0.00	100.0%	1,100.00					No	From plan 1134

2.3 Actions-> Copy Event Plans

You can save data entry time by making a copy of the Event Plans.

1. Go to *iTPM -> Annual Plan -> Event Plans*
2. *VIEW* the event plan you want to copy.
3. Hover over *Actions*, and select *Make Copy*.
4. Change the data you want in your copied Event Plan, then click **SAVE**.
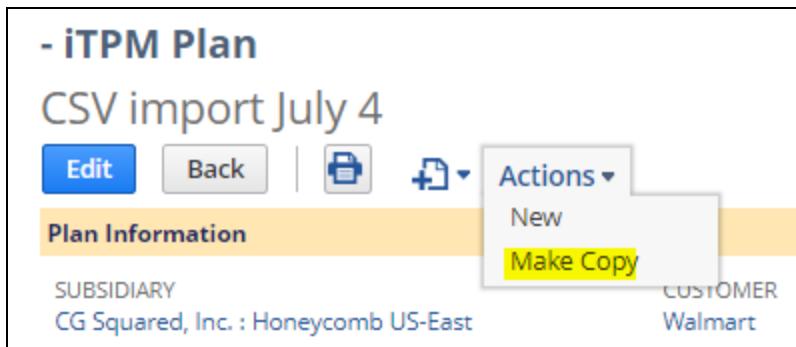
> ⓘ **Helpful Hint:** If you accidently create a duplicate Event Plan, you will see a warning banner and ERROR processing note. If you want iTPM to create a duplicate promotion for the same customer, promotion type, dates and promotion title, change the promotion name in one of your Event Plans so it is different.
> Example: Both have "August BOGO". Change the name in one event plan to "August Bogo #2".

2.4 Make changes directly in your list grid view

To edit data directly in the list-view, check [EDIT ✓⭕]. It will turn green and you will see a pencil [✏] icon in every column that allows you to edit directly in the grid. (This is a native NetSuite feature.)

*i*TPM

2.5 Validate your Event Plan data

Check the "*Validate?*" checkbox in the Event Plan to validate your Event Plan data.
Click *"Process Event Plans now"* to make the validate script run right away for all event plans.
The script that runs every 15 minutes and on-demand will do the following:
- Populate missing data where possible. Example, default price level to that in the customer record
- If all data is valid, the processing note will be *"Plan Data is Valid"*
- If there is invalid data,
  - The Processing Status will be *ERROR*, and
  - The Processing Note will identify the data issue(s)
- When done, *i*TPM will uncheck the "*Validate?*" checkbox for the Event Plan
- *i*TPM auto-corrects percentages that appear to be off by a factor of 100. Confirm your data is correct!

In the example below: Rows 2,3 and 4 have "*Validate?*" checked. Row 1 does not.
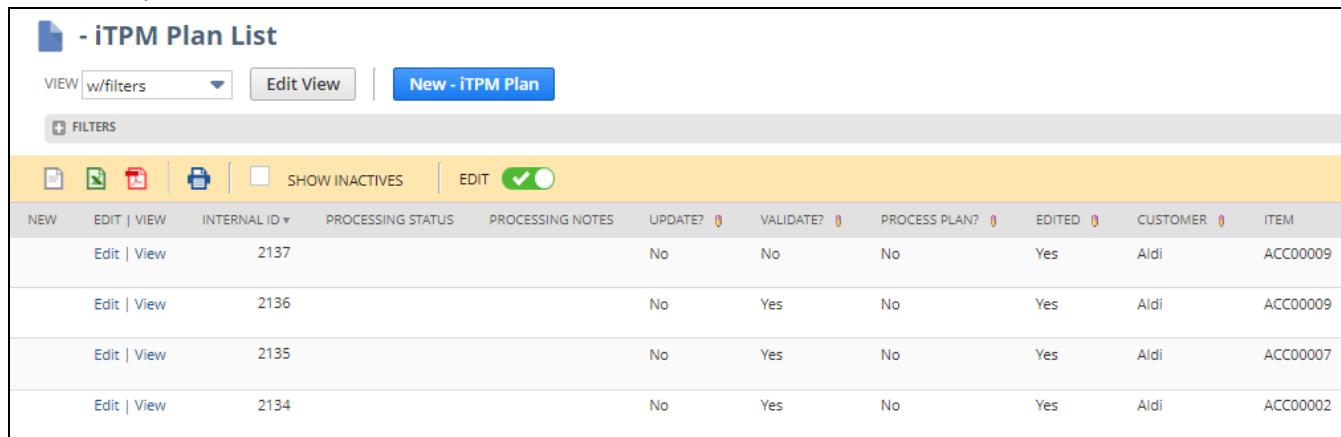
📄 - iTPM Plan List

VIEW w/filters ▼ | Edit View | **New - iTPM Plan**

➕ FILTERS

📄 📊 📕 🖨 | ☐ SHOW INACTIVES | EDIT ✔◯

NEW	EDIT | VIEW	INTERNAL ID ▾	PROCESSING STATUS	PROCESSING NOTES	UPDATE? 🛈	VALIDATE? 🛈	PROCESS PLAN? 🛈	EDITED 🛈	CUSTOMER 🛈	ITEM
	Edit | View	2137			No	No	No	Yes	Aldi	ACC00009
	Edit | View	2136			No	Yes	No	Yes	Aldi	ACC00009
	Edit | View	2135			No	Yes	No	Yes	Aldi	ACC00007
	Edit | View	2134			No	Yes	No	Yes	Aldi	ACC00002

After 15 minutes, the same Event Plan list shows the results of validating the plan data:
- Row 1: No change, because "*Validate?*" was not checked.
- Row 2: Status = *ERROR*. The selected promotion type is not available for the customer's subsidiary
- Row 3 & 4: Processing Notes tell you the Event Plan data is valid for creating promotions.
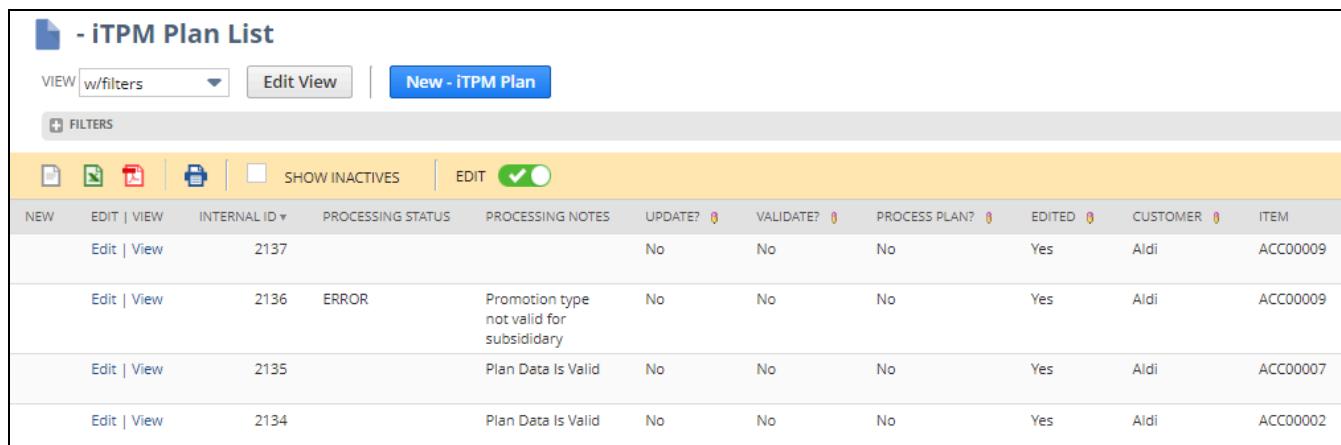
📄 - iTPM Plan List

VIEW w/filters ▼ | Edit View | **New - iTPM Plan**

➕ FILTERS

📄 📊 📕 🖨 | ☐ SHOW INACTIVES | EDIT ✔◯

NEW	EDIT | VIEW	INTERNAL ID ▾	PROCESSING STATUS	PROCESSING NOTES	UPDATE? 🛈	VALIDATE? 🛈	PROCESS PLAN? 🛈	EDITED 🛈	CUSTOMER 🛈	ITEM
	Edit | View	2137			No	No	No	Yes	Aldi	ACC00009
	Edit | View	2136	ERROR	Promotion type not valid for subsididary	No	No	No	Yes	Aldi	ACC00009
	Edit | View	2135		Plan Data Is Valid	No	No	No	Yes	Aldi	ACC00007
	Edit | View	2134		Plan Data Is Valid	No	No	No	Yes	Aldi	ACC00002

> ℹ **Helpful Hint:** Go to 4.6 Plan Validation Errors and how to fix it for a list of errors and what to do to fix the error. You do not need to re-import your data to correct errors. You can fix data directly in NetSuite.

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2.6 Need to remove an item from the promotion?

If you create a promotion and later determine that you need to remove it from the promotion, you can use the "*Remove this item from the promotion?*" checkbox in the Event Plan. To remove the item, you don't need to change the "*Create or Update promotion?*" checkbox.

Before "*Remove this item from the promotion?*" is checked, three planning records in promotion #29750.

About 15 minutes later after "*Remove this item from the promotion?*" is checked, the planning record for plan 1134 is removed from promotion #29750.

⚠️ **Note:** After *i*TPM version 22.2.1, *i*TPM will only remove an item from a promotion that is in DRAFT status.

ℹ️ **Helpful Hint:** When you delete an item, the planning record ID will be changed to blank. If you need to see the original value, go to the System Information subtab.

*i*TPM

2.7 Calculated Base

If you create a monthly base forecast for your customer and item, *i*TPM will calculate a base volume with the data using your Event Plan's shipment dates. To see *i*TPM's calculated base, check "*Validate Data?*" or "*Create or Update Promotion?*" checkboxes.

After the plan-to-promotion script validates your data, you'll see a calculated base in the same unit-of-measure of your discounts. In the example below, the promotion dates include all of March and April. The base for these months is 480 Each(48e/cs). *i*TPM calculates how much of the promotion overlaps the base forecast months, and then calculates a base. In the example below the calculated base is 480 + 480 = 960. Check "Update base with Forecast" if you want to overwrite your base with the *i*TPM calculated base.

2.8 Delete the Draft Promotion?

Use this feature if you made a mistake in your Event Plan and want to have *i*TPM delete the promotion for you.
If the promotion created from your Event Plan is in DRAFT status, you can delete the promotion:
- Check the "*Delete Promotion*" checkbox to delete the promotion.
- If you have multiple Event Plans in the same promotion, checking this checkbox in one of the Event Plans will delete the promotion and update all the Event Plans in the Group.
- If successful, the processing message will say "*Promotion deleted / inactive*" after the script runs.

Before the plan-to-promotion script runs:

After the plan-to-promotion script runs:

The promotion is marked as inactive and will be deleted overnight:

2.9 Duplicate Base Forecasts

Duplicate monthly base forecast records are identified with a yellow banner.
A duplicate base forecast is defined as the same Year, Customer, Item AND Source.

Helpful Hint: If you are storing multiple base forecasts, you can eliminate this banner by changing the source. You also have the option to delete and/or ignore older forecasts so *i*TPM will skip them.

Example: You can create two base forecasts for the same year, customer and item where SOURCE= *Spins (through March)* and another record where SOURCE= *Spins (through June)*   In this example, neither base forecast will show the yellow duplicate banner.

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3.0 Annual Plan Roll-ups

To analyze your annual plansCreate a **NetSuite dataset** that includes these custom records:
- Monthly Base Forecast, and
- Event Plans

Create **NetSuite workbooks** for a total view of your annual plan:

The monthly base forecast gives you base revenue by item by month.
- You can create monthly base for items and item groups
- Use the the "Exclude from Roll-ups" checkbox to prevent double counting in your roll-ups if the item data is also in your item group records
- Combine your base plus the incremental from your promotions for a total annual plan.
- Multiple NetSuite datasets can be linked to provide a total business roll-up.
  - Example 1: Link Monthly base forecast and promotion KPIs
  - Example 2: Link NetSuite budget, Monthly base forecast and Event Plans

Note: Event Plans and Promotion KPIs are a data source for trade spending and incremental revenue.

Note: Your Event Plans do not 'explode' item groups to individual items.

> **(i)**   **Helpful hint:** More information is in the iTPM Analytics Workbook user guide.
>
> In NetSuite, go to iTPM -> Help -> Analytics, or go to www.i-TPM.com/analytics

Example *i*TPM Workbook 810 showing Month-to-date forecast and Rest-of-Forecast from the forecast data:

Customer	Units MTD Forecast (Sum)	Units: Forecast Rest of y...	Units: Total Year (Sum)
Albertsons / Safeway	6,601.00	6,600	13,201
Aldi	1,800.00	1,800	3,600
Walmart	1,200.00	1,200	2,400
Grand Total	**9,601.00**	**9,600**	**19,201**

4.0 Create Promotions from your Event Plans

After you create your Event Plans in NetSuite, the next step in the annual planning process is to have *i*TPM automatically create promotions from your Event Plans.
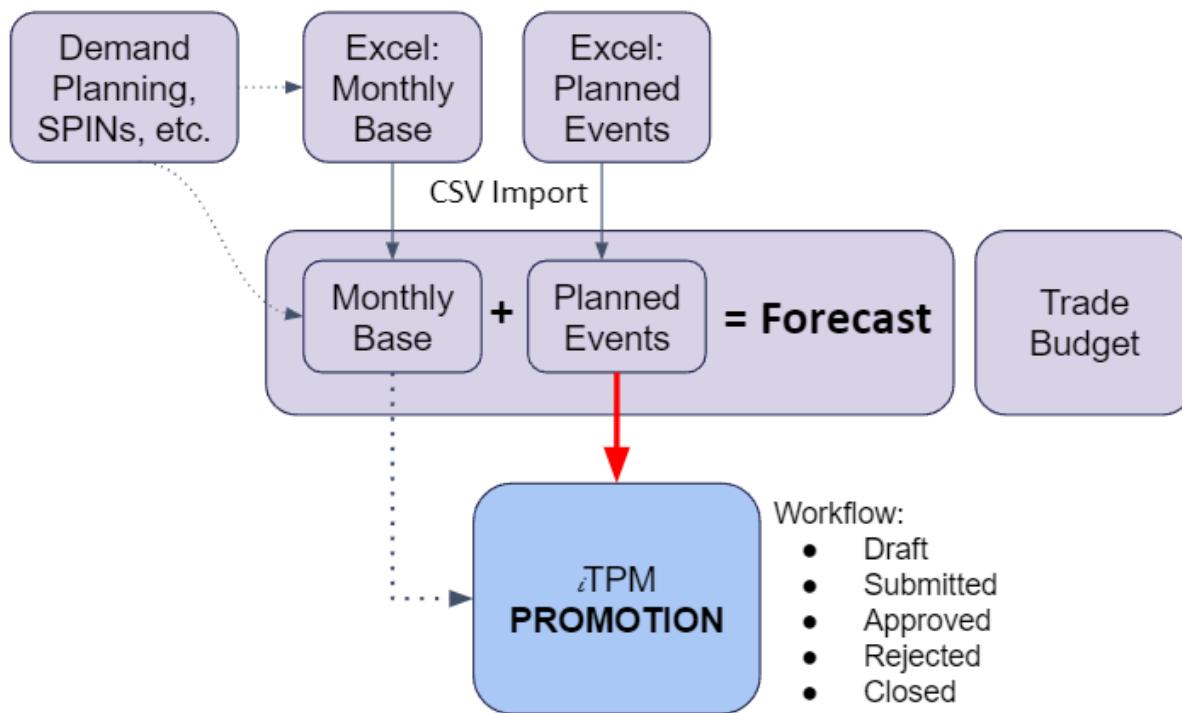
4.1 Confirm the *Group?* option before you create promotions

If you want to combine Event Plans for the same customer, promotion type and dates into one promotion, be sure you have "*Group?*" checked in all of your Event Plans BEFORE you create the promotion.

If you made a mistake and have promotions incorrectly grouped or not-grouped, you can use the "*Delete Promotion?*" checkbox to delete the drafts promotions and start over again.

For more details, go to 2.2 One item per promotion, or multiple items per promotion?

If you need help fixing an error in your promotions created by Event Plans, email support@cgsquared.com for help.

> **Helpful Hint:** "Group?" defaults as checked. When CSV Importing your plans from Excel, if your CSV import runs server-side scripts, *Group?* will be checked by default, unless you specifically set the value to unchecked, or if you include *Group?* as a column in your CSV file.

4.2 Create and/or update the promotion

After you create or upload your Event Plans in NetSuite, to create promotions from your Event Plans, check "*Create or update promotion?*".

> ⓘ **Helpful Hint:** *i*TPM automatically validates your data when you create or update the promotion, so you can, but you don't have to check "*Validate data?*" when you are ready to create your promotion.

You don't have to do this one plan at a time, you can check the "*Create or update promotion?*" checkbox directly in your list view.   If there are too many Event plans to manually check, use a CSV export and import.

> ⓘ **Helpful Hint:** If the next step is submitting these promotions for approval, you have the option to also check "*Run Process Plan in Promotion?*". The SUBMIT button on the promotion will not be visible until after Process Plan runs.
> If you forget or choose not to run Process Plan when you update your promotion, Process plan will automatically run every evening for promotions that need it.

The script that creates promotions from plans runs every 15 minutes will do the following:

Before *i*TPM can create your promotion, the script automatically validates your Event Plan data:
- Populate missing data where possible. Example, default price level to that in the customer record
- If there is invalid or missing data that's required,
  - The Processing Status will be *ERROR*, and
  - The Processing Note will identify the data issue(s)
  - No promotions will be created or updated from this Event Plan.

If your Event Plan data is valid and complete, the script will create a promotion:
- If the promotion already exists, it will be updated. If it doesn't, a new promotion will be created.
- If the planning record in the promotion already exists, it will be updated. Otherwise a new one will be created in the promotion.
- Links connecting the Event Plan and Promotion populated. See 4.4 Plan, Promotion and Planning IDs
- The Processing status is set to SUCCESS. This is your confirmation, along with the promotion #, that your promotion was created from your Event Plan.

Note: If your Event Plan says "Plan data is valid", you may need to check "*Create or update promotion*" a second time to create the promotion.

*i*TPM

4.3 '*Run Process Plan*' checkbox

Event Plan: You have the option to let *i*TPM automatically run *Process Plan* after it creates the promotion.

This is the same as if you viewed the draft promotion and clicked on the Process Plan button. Checking this checkbox eliminates the need to manually check this if you need *Process Plan* to run immediately after the promotion is created, or to wait until Process Plan runs automatically overnight.

- iTPM Plan
Fef 15 bill-back

| Edit | Back | | Process Event Plans Now | | 🖨 | ⤵ | Actions |

Plan Information

SUBSIDIARY	CUSTOMER	PROMOTION TYPE / TEMPLATE	TITLE / REFERENCE CODE	PROMOTION OWNER
Honeycomb Holdings Inc. : Honeycomb Mfg.	Target	MCB (direct accounts)	Feb 15 bill-back	Mary Redding
	PRICE LEVEL	PLAN APPROVAL STATUS	OTHER REFERENCE CODE	☐ REMOVE ITEM FROM PROMOTION?
EVENT PLAN #	10% Discount Level			☐ DELETE PROMOTION?
1	CURRENCY	☑ GROUP PLANS WITH THIS TITLE?	PROMOTION DESCRIPTION	☐ IGNORE?
PROMOTION # PLANNING #	USA	☐ VALIDATE DATA?		☐ THIS IS A DUPLICATE
378 327		☐ RUN PROCESS PLAN?		☑ FLAG DUPLICATES IGNORE?
PROCESSING STATUS		☐ CREATE OR UPDATE PROMOTION?		BROKER / OTHER NOTES
SUCCESS				
PROCESSING NOTES				
Plan Data Is Valid				

Plan Dates

> ⓘ **Helpful Hint:** If you use Group = YES and you have many items in your promotion, we recommend you do NOT use the "Run process plan in Promotion?" option. Let *i*TPM automatically run *Process Plan* for you overnight.

> ⓘ **Helpful Hint:** In *i*TPM 22.2.1, Process Plan is automatically run overnight for all plans that need process plan run.   To see what promotions will run overnight, use the dashboard reminder "Promotions that need Process Plan".
>
> **Home**
>
> **Reminders**
>
> 17 - iTPM Promotions need Process Plan

iTPM

4.4 Plan, Promotion and Planning IDs

Event Plan: There are fields in your Event Plan that show what's been created or updated:
- **Plan #** is the plan you are viewing.
- **Prom #** is the promotion that was created from the Plan.
  Example: To view promotion 1035, enter "Prom: 1035" in the NetSuite global search.
- **Planning #** is the planning record that was created in the promotion.
  Example: View the promotion, and look for the Event Plan discounts under the Planning Subtab.

- iTPM Plan

CSV import July 4

Edit | Back | 🖨 | 🗗▾ Actions ▾

Plan Information

SUBSIDIARY
CG Squared, Inc. : Honeycomb US-East

CUSTOMER
Aldi

PLAN # PROM # PLANNING #
1035   29750   2284

PRICE LEVEL
List Price

PROCESSING STATUS
SUCCESS

PROCESSING NOTES
Plan Data Is Valid

Promotion: There are fields in the promotion that show what Event Plan created or updated:

- Under the PLANNING subtab in the promotion, in the Planning grid, you will see the Plan # in the processing response. After Process Plan runs, click on the Planning record ID in the promotion to view the Plan #.

PLANNED SPEND	EVERYDAY PRICE	MERCH PRICE	ACV W/DISPLAY	ACTIVITY	PROCESSED?	PROCESSING RESPONSE
0.00					No	From plan 1034
0.00					No	From plan 1035

- View the promotion to see the Plan #. If you grouped multiple Event Plans into one promotion, only the first plan # in the group is visible in the promotion.

- iTPM Promotion

CSV import July 4

Edit | Back | Refresh KPIs | Copy Promotion | Process Plan | Submit | Void | 🖨 | 🗗▾ Actions ▾

Promotion Information

SUBSIDIARY
CG Squared, Inc. : Honeycomb US-East

PROMOTION TYPE
MCB (direct accounts)

CUSTOMER
Aldi

STATUS CONDITION
Draft   Future

CURRENCY
USA

TITLE / REFERENCE CODE
CSV import July 4

PROMOTION #
29750

PRICE LEVEL
List Price

OTHER REFERENCE CODE
PLAN# 1134

DESCRIPTION

4.5 *'Process Event Plans Now*' button

Your Event Plan doesn't create a promotion until a script runs. Your *i*TPM Administrator will decide how often to run this script,which can be as often as every 15 minutes, or it may only be once every day.

> ⓘ **Helpful Hint:** Sometimes the "Process Event Plans" script will run twice before a promotion is created from your Event Plan. After the first pass you'll see "Event Plan data is valid" in the processing notes. After the second pass a promotion will be created and you'll see "SUCCESS" in the process message.

Don't wait! Click the "*Process Event Plans Now*" button to run the script that creates promotions from your plans.

When the script is running, you will not see the "*Process Event Plans Now*" button.

- The script will process ALL of the event plans in NetSuite, not just your plans.
- The script may take a short or long time to finish, depending on how many plans it must process and what other *i*TPM and non *i*TPM scripts are running in NetSuite.

> ⓘ **Helpful Hint:** If you click on the "Process Event Plans Now" button and it never disappears, or if you don't see the button, then your role may not have the required permissions to use this button.

*i*TPM

4.6 Event Plan 'processing notes' and how to fix them

The CSV import process is designed so that you can import plan data that may be incomplete and/or invalid.
- After the import you have the opportunity to edit your data and correct your data in NetSuite.
- The ERROR status will be cleared when you save the changes to the Event Plan.
- Below are *Processing Messages* in your Event Plan and how to fix them.

Message	What it Means	How to fix the issue
	When blank, your Event Plan was not processed yet.	Check "Validate?" and/or "Create or update promotion?" checkboxes.
Plan type not available for subsidiary	The plan type you selected is for a different subsidiary	Either change the subsidiary in your Plan, or change the plan type to one that's valid in the Plan Subsidiary
Item not available for discounts	This item in your Plan does not have "*Available for iTPM?*" checked.	Using a role with the appropriate permission, check "*Available for iTPM?*" in the item record.
MOP is not valid for this promotion type	The method of payment you selected is not valid for the promotion type you selected. i.e., Bill-back	Either change the promotion type, or change the method of payment. i.e., change promotion type from 'EDLP' to 'Scan'.
Order dates invalid	Your order dates are failing a validation. Order start must be equal or before ship start. Order end must be equal or before Ship End date.	Change your order dates to be before or equal to the corresponding ship dates. Note: Performance dates are not validated vs. ship and order dates, they only need to be valid dates.
Ship dates invalid	Ship END date must be after or equal to the Ship Start date. All plans require ship dates.	Change your ship end date so it is equal to or after your ship start date.
Missing or invalid UOM	The unit-of-measure is missing or invalid, and *i*TPM can't find a default value. i.e. Case	Select a valid unit-of-measure for the item.
Missing price level	If blank, *i*TPM will use the customer's price level as a default. If the customer record doesn't have a default value, *i*TPM will use the default in *i*TPM Preferences.	In the unlikely situation that price level did not default for your plan event, either populate a price level in the customer record, or populate a valid price level in your Event Plan.
Item must be inventory, assembly or group	The item in the plan can't be used to create a discount in the *i*TPM promotion.	Select a different item, one where the type is either an inventory, assembly or NetSuite Item Group.
Only populate % discount OR discount rate	You entered both a rate and percent discount. Which one do you want *i*TPM to use?	Blank out or enter a zero for the discount that you want *i*TPM to calculate using the other discount.
Enter incremental or % lift, not both	You entered both incremental units and % lift. *i*TPM doesn't know which one to use?	Blank out or enter zero either % lift or incremental units.
Maybe Duplicate item	For the same customer, same promotion title, and same dates, you have the same item.	If you created duplicate items, you can delete these plans or check IGNORE? and/or Inactive. *i*TPM doesn't process plans with these checkboxes checked.
Data is valid, but no discounts	Rate per unit and % discount are zero. If this is correct, then no action is required.	If your discounts are not correct, enter the discount rate OR %, check "Create or Update promotion" to re-process.
Promotion is Approved status	Your Event Plan can only update promotions that are in DRAFT status.	Use "Void or Change", then Back-to-Draft buttons on the promotion to return it to DRAFT status.

Continued from the previous page: *Processing Messages* in your Event Plan and how to fix them.

Processing Message	What it means	How to fix it
Promotion Deleted	Information: You checked "Delete Promotion", and *i*TPM successfully deleted the promotion.	You can delete, ignore or re-process this plan record because the promotion previously created was deleted..
Missing Period	The field Period Start is blank.	This is just a warning, as this field is optional.
Customer is not in the subsidiary	The plan subsidiary is different from the main subsidiary of the customer.	This is just a warning, because your NetSuite confirmation may allow this.
Plan Data is valid	There is no missing or invalid data in your Event Plan.	If you haven't created a promotion, check "Create or update promotion?"
Planned Spend not calculated: Populate price level or check Validate Data?	You created the event plan, but the price level is blank. Price level is needed to calculate KPIs.	Check Validate?" and/or "Create or update promotion?". iTPM will populate a default price level from the customer record and calculate the plan KPIs.
Process Plan running, waiting until it is done.	You checked "Run Process Plan", but it's already running on the promotion.	No action required. When *Process Pla*n is done with the promotion, your plan will be processed.
Duplicate: Ignore checked	iTPM identified that this plan is a duplicate of another plan and has automatically checked "ignore" in the plan.	If this plan is correctly identified as a duplicate, no action needed. You have the option to delete the duplicate.
Promotion Inactive or Deleted	You checked "Delete Promotion?"	No Action. Promotion is deleted, and/or is inactive and will be deleted overnight.

_i_TPM auto-corrects the % redemption and % discounts if they appear to be uploaded in the wrong format.

Percent Redemption Auto-correct:
- The expected value for redemption is 100%, but sometimes it is less than 100% but not 1% or smaller.
- If you upload 100 as 100%, Excel stores it as 1.0. NetSuite will upload it as 1%, which is not correct. This will make your planned spending off by two orders of magnitude.
- When *i*TPM validates your Event data, it assumes that any percent redemption equal to or less than 1% was uploaded in the wrong format.
- Examples: 1% is corrected to 100%, and 08% is corrected to 80%.

Percent Discount Auto-correct:
- Typical percent discounts in promotions are greater than 1%.
- Just like percent redemption, you may store the discount in Excel as a percent, which causes it to be off by a factor of 100 in your Event Plan when you CSV import your data.
- When *i*TPM validates your Event data, it assumes that any percent discount equal to or less than 1% was uploaded in the wrong format.
- Example: .045% discount will be changed to 4.5%   .012% will be changed to 1.2%

⚠️ **Note:** If you need to create a promotion with a percent discount less than 1%, you may need to manually create the promotion. If the promotion was created by CSV upload, be sure to review the final percent discount in your promotion. You may need to manually change the discount to the correct percentage to override the auto-correct feature.

5.0 Review, Submit and Approve your *i*TPM Promotions

Promotions you create from Event Plans will start in DRAFT status. The script that creates your promotions does not submit or approve your promotions. After you promotion is created, promotions follow the normal workflow as shown below:
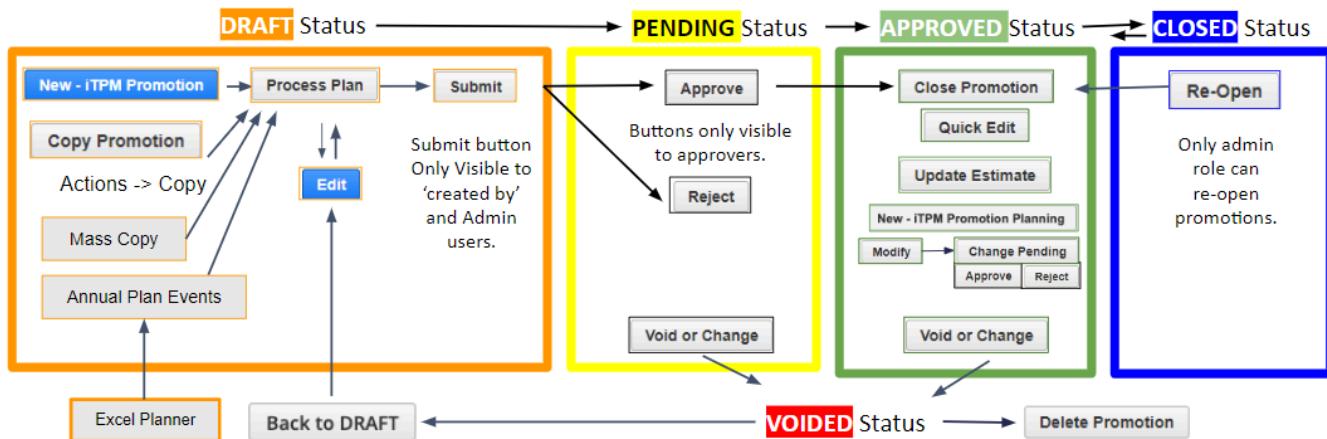
5.1 Workflow buttons on *i*TPM Promotions

*i*TPM promotions can be manually reviewed and submitted for approval. If configured for auto-approval, future promotions may be auto-approved. All other promotions can be approved using the workflow APPROVE and REJECT buttons on the promotion.

Your promotion is in **DRAFT** status until you submit it for approval.   When your promotion is complete, click on   Submit   to have a supervisor review and approve the promotion.

> ⓘ **Helpful Hint:** If your promotion start date is in the future, promotions may be configured to auto-approve if the estimated spend is equal or less than the threshold amount set by your organization. Back-dated promotions will need to be approved.

> ⓘ **Helpful Hint:** Your promotion will be in "**PENDING APPROVAL**" status until your supervisor approves your promotion.   If your promotion qualifies for auto-approval, your promotion will automatically change to *Approved* status!

> ⓘ **Helpful Hint:** The **SUBMIT** button will ONLY be visible when you **VIEW** a promotion, and not visible when you are editing the promotion. To save mouse clicks, use the **VIEW** link in the promotion list when selecting promotions from a list.

For more information, see section 2.11 and chapter 3 in the Promotions User Guide at www.i-TPM.com/promotion-planning.

To submit and approve up to 500 promotions at once, see 5.2 Optional: Mass Approve on the next page.

*i*TPM

5.2 Optional: Mass Approve Promotions

If your NetSuite role has the appropriate permissions, you can mass submit and mass approve your promotions using the browser.   If your role has additional permissions you may have access to forms that allow you to do the same task but for hundreds of promotions at a time. You can Mass Submit Draft promotions directly to approved status and skip the Pending Approval Status.

Select what you want to do from the *i*TPM Menu:
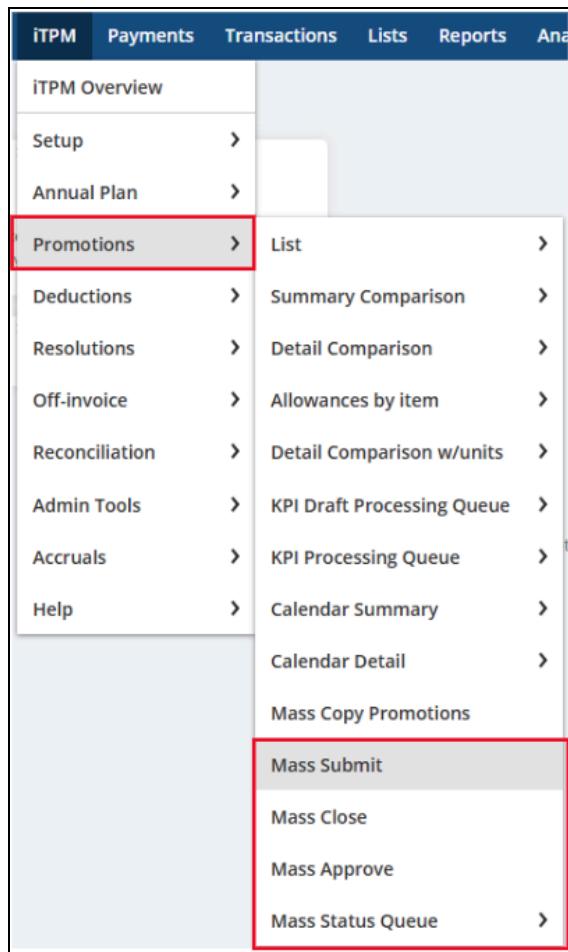
Step 1: Set your **filter** (Role restrictions apply)

Step 2: Click **SEARCH**, and answer "YES" to leave the form.

Step 3: **Mark** the promotions you want to change and then…

Step 4: Click **SUBMIT**.

To see the status of your request, go to ***iTPM -> Promotions -> Mass Status Change Queue***

> ⓘ **Helpful hint:**   You can use the NetSuite % wild card to search for text in your promotion name, other reference code, etc. Example. Enter %BOGO% to find all promotions with 'Bogo' in the name.

6.0 Optional: Start in Excel & then CSV import

You have the option plan in Excel and use NetSuite CSV imports to import the data into NetSuite:
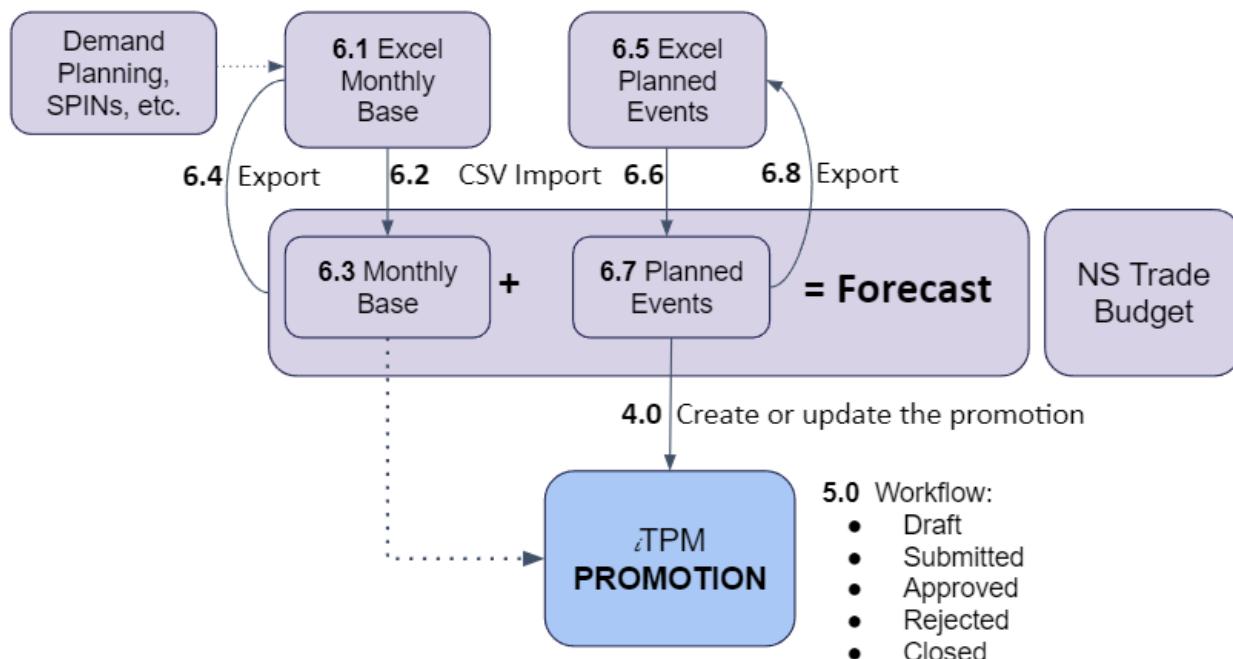
Import the Monthly Base Forecast:

If you want to plan your total annual business, you can import your monthly base forecast in units and/or dollars. Skip these steps if you are only using the annual planner as an easier way to create promotions.

- **6.1:** Populate the Monthly Base Excel Template
- **6.2:** CSV import your Monthly Base data
- **6.3:** Review your base data in NetSuite
- **6.4:** Optional: Export base forecast back to Excel

Import the Event Plans:

Instead of entering your promotional data directly in NetSuite, you have the option to create your event plans in Excel. This may be helpful if you have planners that don't have access to NetSuite. Once imported, event plans are the same as ones created through the browser.

- **6.5:** Populate the Event Plan Excel CSV Template
- **6.6:** CSV Import your Event Plans.
- **6.7:** Review and validate, and correct your event data where needed.
- **6.8:** Optional: Export Event Plans back to Excel

Create *i*TPM promotions from your Event Plans:

Deductions can not be matched and resolved to event plans, only *i*TPM Promotions.

- **4.0:** Create promotions from your event plans
- **5.0:** Submit and Approve the promotions
  - Review promotions that didn't auto-approve
  - Optional: Use Mass Status Update to submit your draft promotions for approval, and/or to approve these newly created promotions.

*i*TPM

6.1: Populate the Monthly Base Excel Template

Your organization will customize the iTPM Monthly Base Forecast template with a format specific for your business.

Use your customized template to **create a CSV file** with your monthly base forecast information::

> **Email support@cgsquared.com** for help customizing your CSV imports and the CSV templates.

> **Row 1:** The header with standard *i*TPM column descriptions.
> **Rows 2 & more:** Each row represents one promotion you want to create.   (Example below)

	A	B	C	D	E	F	G	H
1	Year	Customer	Item	Item Description	Item ID	UOM	Forecast Data entry method	Source
2	2024	Walmart	-Brand A (9 items)	Brand A items	1009	Each(1)	Calculate Revenue	Forecast
3	2024	Walmart	ACC00003	Product A size 3	502	Each(1)	Calculate Revenue	Forecast

	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
	Measure	01 Jan	02 Feb	03 Mar	04 Apr	05 May	06 Jun	07 Jul	08 Aug	09 Sep	10 Oct	11 Nov	12 Dec	Total	Exclude in roll-ups
	Units	100	90	100	94	102	105	103	103	102	100	95	100	1194	No
	Units	200	201	199	200	201	199	200	201	199	200	201	199	2400	Yes

> To save time or if you get an error message, review CSV Do's and Don't.

COLUMN & Name	Description / Helpful Hints (BOLD = REQUIRED FIELD for CSV import)
A: Year	NetSuite fiscal year: This is a # like 2024. (Year is recommended, but not required)
B: Customer	**The customer name in Excel must exactly match the NetSuite name.**
C: Item or Item Group	**This is the item or NetSuite item group and exactly match NetSuite**
D: Item Description	Optional/ info: Helps the user in Excel. Not used in the CSV import.
E: UOM	**Unit of measure for allowances, and must exactly match: i.e. Unit, Case**
F: Data Entry Method	Calculate Revenue, Calculate Units, Calculate Price, Data entry or blank
G: Source	Use this to help identify what the data is:
	Example: Shipments, Consumption, IRI, ACN, Spins
H: Measure	This is used to convert revenue into units, or units into revenue
	Example: Case, Each
I:	These are your data values for UNITs, REVENUE, and PRICE.
…through ..	Your column I will be mapped to period 01, your first period in NetSuite.
U	Your column J will be mapped to period 02, your second period in NetSuite, etc.
V: Total	This is the total of column I through U.
W: Exclude in roll-ups	Use this for reporting to determine what to include in your roll-ups

=============== The following are optional fields, and not shown in the screenshot above =============

X:	External ID:	This is a unique # that allows you to update plans after you first import them.
Y:	Price Level	Optional: iTPM will default to the customer's price level if you don't populate it.

6.2   CSV import the Monthly Base Forecast

Import your CSV promotion file that you created in step 6.1

Email support@cgsquared.com for help customizing your CSV imports and the CSV templates.

Follow steps to How to Import your saved CSV files
You will select saved CSV import *- iTPM Base Forecast (for units)*
(Note: If you customize this CSV import, the name may be different.)

Saved CSV Imports

ID	NAME ▲	TRANSLATE	FIELD MAP	DESCRIPTION	TYPE
32	- iTPM Base Forecast (for units)	Translate	View	Use this to import non-promoted BASE	Custom Record

Helpful Hint: The saved CSV import is created for cases. You can modify this saved CSV import file to map Revenue and/or Item Price in your Excel columns to the appropriate NetSuite fields:
- Example: *'01:' is for NetSuite period 1, "02' is for NetSuite period 2, etc.*
- 'Price' = item price, "Rev" = base in dollars, and "Units" is the base in your UOM, like cases.

Note: If you exported your data, or want to update existing Event Plans in NetSuite, we recommend making a copy of the saved CSV import and using the INTERNAL ID.

*i*TPM

6.3   Review, validate and correct Monthly Base Forecast in NetSuite

To view your monthly forecast,

- Go to *iTPM -> Annual Planning -> Monthly Base*
- Change your view to either UNITS, REVENUE or PRICE.
- Click VIEW on any row to see all of the monthly values for a customer, year and item.

See chapter 1 for how to edit, change and update your Monthly Base Forecast inside NetSuite.

6.4   Export the NetSuite Monthly Base Forecast (optional)

To export monthly base data, **click the Excel** **icon.**
Your CSV data will be in the bottom left corner.

Internal ID	Customer	Year	Source	a Entry Met	Item	it of Meas	01: Units	02: Units	03: Units	04: Units	05: Units	06: Units	07: Units	08: Units	09: Units	10: Units	11: Units	12: Units	Units Total	n roll-u
101	Walmart	2022	Forecast		-Brand A	Each(1)	100	90	100	94	102	105	103	103	102	100	95	100	1194	No
102	Walmart	2022	Forecast		ACC00003	Each(1)	200	201	199	200	201	199	200	201	199	200	201	199	2400	Yes
103	Walmart	2022	Forecast		ACC00004	Each(1)	10	10	10	10	10	10	10	10	18	18	18	144	Yes
104	Walmart	2022	Forecast		ACC00008	Each(1)	15	15	15	15	20	20	20	15	15	15	15	195	Yes

iTPMMonthlyBaseforecastList

6.5   Populate the Event Plan CSV Excel Template

Create a CSV file with the following information for the promotion you want to create:

Row 1:   The column header with standard *i*TPM column descriptions.

Rows 2 & more: Each row represents one promotion allowance you want to create.

The following columns in your CSV file are the same fields you enter when creating event plans in the browser.
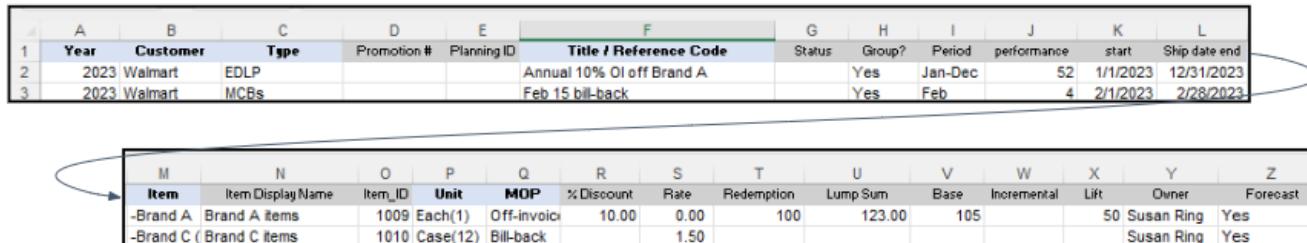
	A	B	C	D	E	F	G	H	I	J	K	L
1	Year	Customer	Type	Promotion #	Planning ID	Title / Reference Code	Status	Group?	Period	performance	start	Ship date end
2	2023	Walmart	EDLP			Annual 10% OI off Brand A		Yes	Jan-Dec	52	1/1/2023	12/31/2023
3	2023	Walmart	MCBs			Feb 15 bill-back		Yes	Feb	4	2/1/2023	2/28/2023

	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
	Item	Item Display Name	Item_ID	Unit	MOP	% Discount	Rate	Redemption	Lump Sum	Base	Incremental	Lift	Owner	Forecast
	-Brand A	Brand A items	1009	Each(1)	Off-invoice	10.00	0.00	100	123.00	105		50	Susan Ring	Yes
	-Brand C (	Brand C items	1010	Case(12)	Bill-back		1.50						Susan Ring	Yes

Excel COLUMN & Name	Description / Helpful Hints (BOLD = REQUIRED FIELD for CSV import)
A: YEAR	NetSuite fiscal year: This is a number, like 2023. (Year is recommended, but not required)
B: CUSTOMER	**The customer name in Excel must exactly match the NetSuite name.**
C: PROMOTION TYPE	**The *i*TPM Promotion Type name must exactly match what's in NetSuite.**
D: Promotion #	Info you can download: This is the promotion # created by *i*TPM from your plan
E: Planning ID	Info you can download: This is the ID of the planning row created by *i*TPM
F: Title / Reference code	**Promotion Title**
G: Approval status	Optional/ info: Use this in Excel to manage your promotion workflow.
H: Group?	Use this to combine event plans into one *i*TPM promotion.
	Plans with the same customer, promotion title and dates can be in 1 promotion.
I: Period	Optional: The NetSuite first period of your event plan
J: Weeks Performance	Optional: *i*TPM may use this to calculate a default base for your plan
K: Ship Date start	Optional for import: START date of the promotion (required for the promotion)
L: Ship Date end	Optional for import: END date of your promotion (required for the promotion)
M: **Item or Item Group**	**This is the item or NetSuite item group and must exactly match NetSuite**
N: Item Display Name	Optional/ info: Helps the user in Excel. Not used in the CSV import.
O: Item Internal ID	Optional: You may want to use internal IDs to import instead of the item name
P: Unit	**Unit of measure for allowances, and must exactly match: i.e. Unit, Case**
Q: MOP	**Off-invoice, Bill-Back, Net-Bill, or Fixed-Price (Must be EXACT)**
R: % Discount*	*Discount Percentage: Enter a 10% discount in Excel as 10. Can be blank
S: Rate*	*Discount Rate: Enter an allowance of $4.00 as 4.00. No leading $, can be blank
T: Redemption	Typically 100%. If left blank, *i*TPM will default to 100%.
U: Lump Sum	Enter $1,000 as 1000. No commas, and no leading $ sign!
V: Base **	**Base is in the units from column O. Enter 1,500 as 1500. No commas
W: Incremental**	**Incremental is in the units from column O. Enter 1,500 as 1500. No commas
X: % Lift**	**Lift: Optional: Enter as a number. Example, 50% lift = 50
Y: Revenue**	**Revenue: Optional: Enter $1,500 as 1500. No commas, and no leading $ sign!
Z: Owner	Who owns the promotion? If blank, defaults to the creator of the plan.
AA: Update base with forecast?	Example of other fields you can add to your planner

External ID: OPTIONAL: This is a unique # that allows you to update plans after you first import them.

* Enter a % discount OR an allowance rate.   (0 is a valid number)

** Enter *Base and Incremental,   Base and % lift*, or   *Revenue and % lift*. (0 a valid number)

⚠️ **Note**: In *i*TPM 24.1.1 and newer, you can upload percentages from Excel as either 10 or .01 for 10%. Any percentage that is between 0 and .01 will be multiplied by 100, so .01 will become 10%. Always review any percentages you upload to confirm they are correct.

> ⓘ **Helpful Hint:** If you include a field like OWNER in your file, make sure the data in your CSV import file is an EXACT match to what's in NetSuite. If you have "susan" as the owner, but "Susan" is the user name in NetSuite, the row in your spreadsheet will not be imported. You'll have to correct the data and re-import.
>
> To prevent these extra steps, consider the following 'best' practices.
>
> 1. Consider using a drop-down menu in your Excel planner so the data values can be populated with EXACT values from NetSuite, or use an Excel vlookup of the NetSuite internal ID for the user.
> 2. Consider modifying the saved CSV import with specific values in the mapping. Example: Map the subsidiary, % Redemption, and other fields that are always the same for your organization. By doing this, you have the option to remove these columns from your planner.

You can add these fields to your planner if you want to import them into your *i*TPM plan and promotion.
If you do, you can make a copy of the standard *i*TPM saved import and map the additional fields you want to import.

Excel COLUMN & Name	Description / Helpful Hints
AB: Est. everyday price	Optional: Everyday price. (no $ or commas)
AC: Est merch price	Optional: Merchandising price (no $ or commas)
AD: Est. %acv	Optional: A percent between 0 and 100%
AE: Activity	Optional: Execution you expect at retail
Broker / Other notes	Optional: Enter the name of the broker or other notes for the event plan

Email support@cgsquared.com for help customizing your CSV imports and the CSV templates.

> ⚠️ **Note**: Your CSV import date form must be the same as your company preferences date format. If these do not match, the promotions you import may have incorrect dates.
> Example: Your company NetSuite default is d/m/yyyy, but your import date format m/d/yyyy.
> Contact *i*TPM to discuss options and work-arounds.

> ⚠️ **Note**: In iTPM 24.1.1 and newer, you can upload percentages from Excel as either 10 or .01 for 10%. Any percentage that is between 0 and .01 will be multiplied by 100, so .01 will become 10%.

6.6   CSV import your Planned Events

Import the CSV file you created in chapter 6.5:

Email **support@cgsquared.com** for help customizing your CSV imports and the CSV templates.

	A	B	C	D	E	F	G	H	I	J	K	L
	Year	Customer	Promotion Type	Promotion #	Planning ID	Title / Reference Code	Approval Status	Group?	Period	Weeks performance	Ship Date start	Ship date end
2	2023	Walmart	EDLP			Annual 10% OI off Brand A		Yes	Jan-Dec	52	1/1/2023	12/31/2023
3	2023	Walmart	MCBs			Feb 15 bill-back		Yes	Feb	4	2/1/2023	2/28/2023

L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA
Ship date end	Item	Item Display Name	Item_ID	Unit	MOP	% Discount	Rate	Redemption	Lump Sum	Base	Incremental	% Lift	Revenue	Owner	Update base with Forecast
	-Brand A	Brand A items	1009	Each(1)	Off-invoice	10.00	0.00	100	123.00	105		50		Susan Ring	Yes
2/28/2022	-Brand C (	Brand C items	1010	Case(12)	Bill-back		1.50							Susan Ring	Yes

Follow steps to 7.2 How to Import your saved CSV files
You will select saved CSV import **- iTPM Plan Import**
(Note: If you customize this CSV import, the name may be different.)

Saved CSV Imports

[New]

➕ FILTERS

ID	NAME ▲	TRANSLATE	FIELD MAP	DESCRIPTION	TYPE
30	- iTPM Plan import	Translate	View	Use this to import Plans; planned events that may be used to create iTPM promotions.	Custom Record

⚠️ **Note**: If you exported your data, or want to update existing Event Plans in NetSuite, we recommend making a copy of the saved CSV import and using the INTERNAL ID.

ℹ️ **Helpful Hint:** If you created a unique External ID for your Event Plan upload, you can correct the data in your Excel CSV file and use "ADD or UPDATE" in your NetSuite import to correct the data. If you have "Run server side scripts" checked, the ERROR status will be cleared by your CSV upload.

⚠️ **Note**: Your CSV import date format must be the same as your company preferences date format. If these do not match, the promotions you import may have incorrect dates.
Example: Your company NetSuite default is d/m/yyyy, but you import date format m/d/yyyy.
Contact *i*TPM to discuss options and work-arounds.

⚠️ **Note**: In iTPM 24.1.1 and newer, you can upload percentages from Excel as either 10 or .01 for 10%. Any percentage that is between 0 and .01 will be multiplied by 100, so .01 will become 10%.

6.7   Review, Validate and correct Event Plans in NetSuite

After you manually create your Event Plans in NetSuite or if you CSV import the from Excel, use these steps to view your event plans:

- Go to *iTPM -> Annual Planning -> Event Plans*
- Change your *VIEW* to *w/Filters*.
- Click *VIEW* on any row to see all of the values for an Event Plan.
- *i*TPM auto-corrects percentages that appear to be off by a factor of 100. Confirm your data is correct!

Helpful Hint: If you don't see the Event Plans, you may need to change your filter
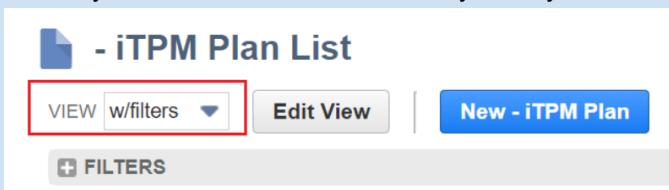
Click the PLUS sign to view and change your filters.

If you need to make changes to your Event plans, click *EDIT*.

- Example: Click *EDIT* in your list view, and check "*Validate data?*" for any event plan you want to *i*TPM to validate and attempt to fill in missing data that's required for *i*TPM promotions.

  For more options, see chapter 2 for how to edit, change and update your Event Plans inside NetSuite, including 2.4 Make changes directly in your list grid view.
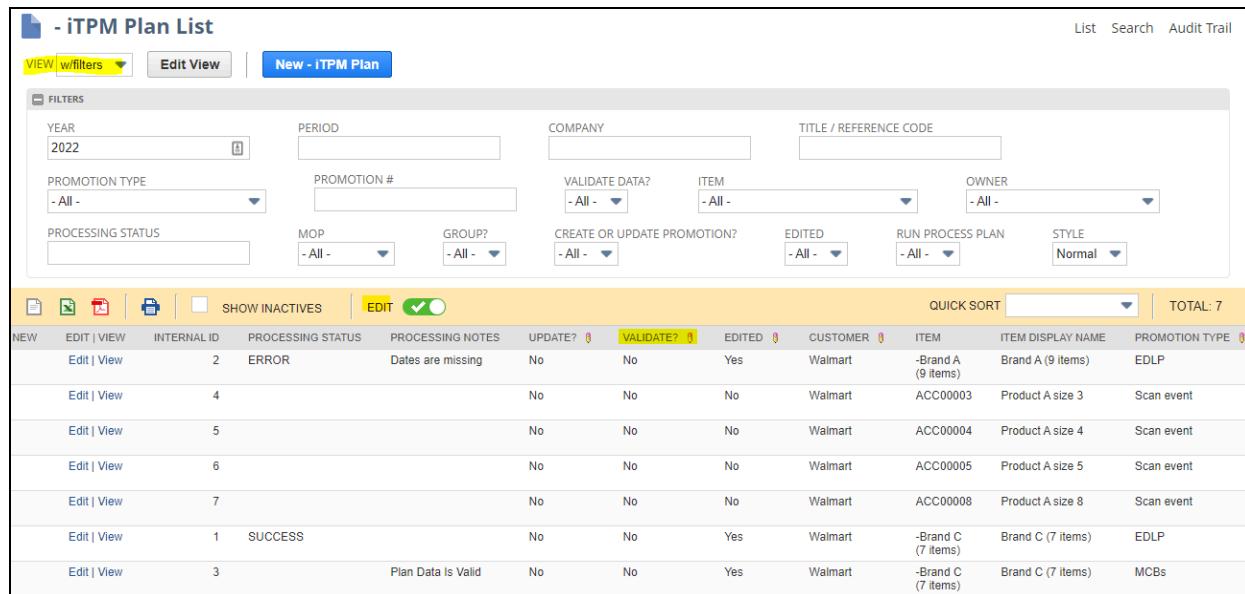
Helpful Hint: The script that validates your Event Plan data is a scheduled script. Your *i*TPM Administrator will determine the frequency, which could be as often as every 15 minutes.

6.8   Export Event Plans already in NetSuite (optional)

After you import some Event Plans, you may want to use Excel to edit your plans outside NetSuite. To do this, you'll export the NetSuite data, make changes, and then re-import the modified plans.

To export Event Plans click the Excel 🗎 icon.
- Your Excel data will be downloaded to your computer.
- You may get this message. Click YES to view your downloaded Plan data.

Microsoft Excel	✕
⚠ The file format and extension of 'iTPMPlanList550.xls' don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?	
Yes No Help	
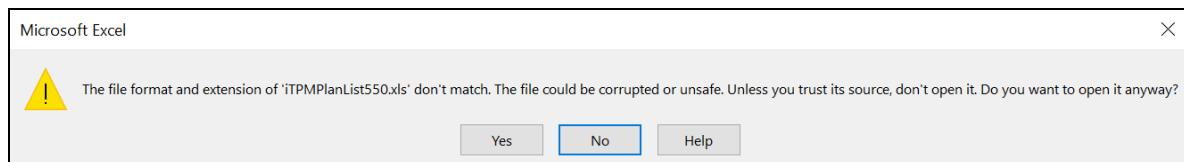
- If your Excel document doesn't automatically open up, look for ⬇ in the upper right corner of your browser.
- Edit your Event data in Excel.
- To re-import it:
  - You'll need to change the file type to CSV.
  - Use a saved CSV import with the UPDATE option using the plan NetSuite internal ID.
  - go back to section 6.6 and follow steps to import the data.

6.9   Export Sandbox Promotions, import in Production (optional)

The "- *iTPM Export Proms to Plans*" saved search can be used to export promotions to a CSV file, and then import them back into NetSuite as plans. These are a few examples of how to use this feature:

- You can't refresh your sandbox, and you have promotions in production that you want in the sandbox for testing or training.
- Your team created 'real' promotions in the sandbox, and to save double data-entry you want to export sandbox promotions into production
- You didn't use the annual planner last year, and you want to give your team last year's promotion in the Excel planner as a starting point for planning.

	- iTPM Export Proms to Plans: Results				List Search Audit Trail
Return To Criteria					

⊟ FILTERS					
ITPM PROMOTION TYPE	OWNER	STATUS	CONDITION	STYLE	
- All -	- All -	- All -	- All -	Normal	

🗎 🗎 🗎 🖨 ✉   EDIT ⬤✕   1 — 55 ▾ ‹ ›   TOTAL: 2289
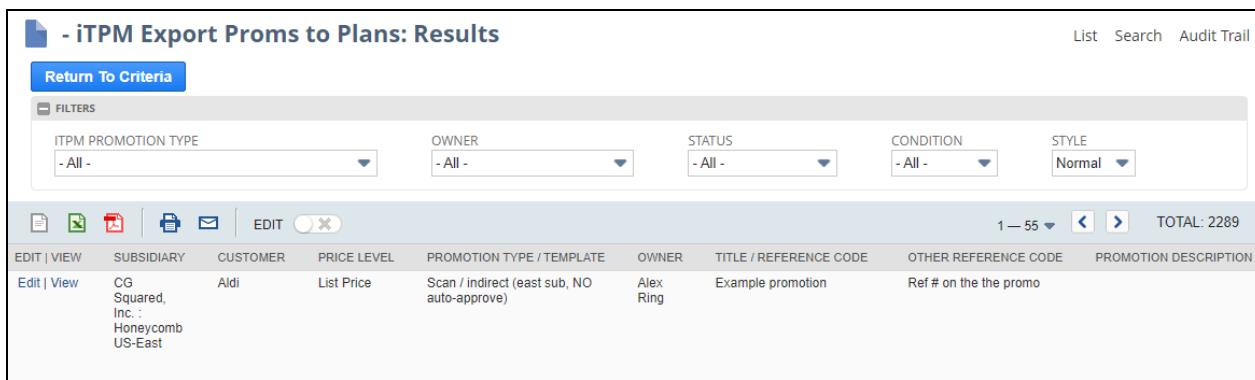
EDIT | VIEW	SUBSIDIARY	CUSTOMER	PRICE LEVEL	PROMOTION TYPE / TEMPLATE	OWNER	TITLE / REFERENCE CODE	OTHER REFERENCE CODE	PROMOTION DESCRIPTION
Edit | View	CG Squared, Inc. : Honeycomb US-East	Aldi	List Price	Scan / indirect (east sub, NO auto-approve)	Alex Ring	Example promotion	Ref # on the the promo	

Here are the steps:

1. In your sandbox, type "- *iTPM Export Proms to Plans*" in NetSuite global search.

2. Set your filter, and click [icon] to export your promotions to Excel.
3. Make changes in Excel as needed.
   The list below shows the fields that will be in your spreadsheet.
   Save your spreadsheet in CSV import.
4. Login to production, and follow steps to CSV import your Event Plans.
   Email support@cgsquared.com for help.

FIELD *	SUMMARY TYPE
iTPM Promotion : Subsidiary	
iTPM Promotion : Customer	
iTPM Promotion : Price Level	
iTPM Promotion : Promotion Type	
iTPM Promotion : Owner	
iTPM Promotion : Name	
iTPM Promotion : Other Reference Code	
iTPM Promotion : Description	
iTPM Promotion : Ship date - Start	
iTPM Promotion : Ship date - End	
iTPM Promotion : Order date - Start	
iTPM Promotion : Order date - End	
iTPM Promotion : Performance date - Start	
iTPM Promotion : Performance date - End	
iTPM Promotion : All items get this discount?	
Item	
Item Display Name	
iTPM Promotion : Lump Sum	
Unit	
More Disc?	
MOP	

%	
Rate	
Base	
Incremental	
% lift	
Revenue	
Redemption	
Planned Spend	
Everyday Price	
Merch Price	
ACV W/Display	
Activity	

*i*TPM

7.0 Reference

7.1   Help!

There are 2 ways for you to get **help**, report **issues**, ask **questions**, and share your enhancement **ideas**:

How to get Help!	Description
Online	Use www.i-tpm.com/annual-planning for User Guide PDFs and Training videos specific to *i*TPM trade promotion planning.
Email	Just email your question or issue to support@cgsquared.com.

Access *i*TPM Online Documentation:

Click ***iTPM -> Help -> Annual Planning User Guides*** to open our web page with links to our User Guides and training videos.
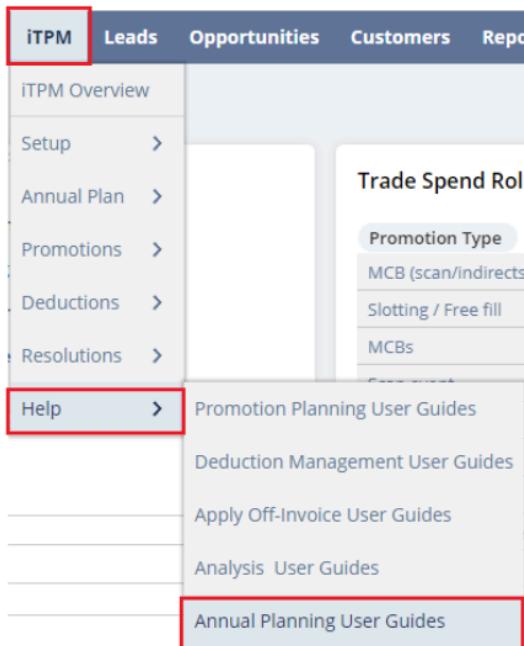
You can also access all of the *i*TPM online documentation by pasting this link into your browser:
www.i-tpm.com/training-resources

Get Help By Email: Email your support question or issue to support@cgsquared.com.

- Your email will create a support ticket so we can answer your question or fix your issue.
- You will get an email reply with an *i*TPM support ticket number in the subject line.
- *i*TPM support staff will follow-up with you by email, and by phone if necessary
- You will receive periodic email updates on the status of your support issue

*i*TPM

7.2   How to Import saved CSV files

Step 1: You created a CSV file using the *i*TPM template. Follow these steps for each of these files.

Step 2: If you use standard NetSuite CSV imports for other tasks, these steps will be familiar:

Go to *Setup -> Import/Export -> Saved CSV Imports*
Click on *- iTPM Plans* or your customized import file to import your event plans … or …
Click on *- iTPM Monthly Forecast* or your customized file to import your base forecast.

Step 3: Click on   Select...   **, select your CSV file and click**   Open
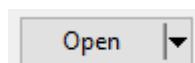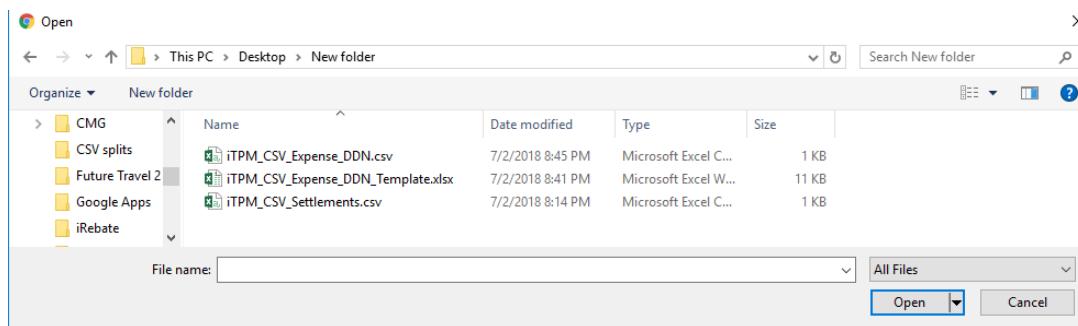
Step 4:   You are on step 1 in NetSuite. (see this in upper left corner)

Click **NEXT** in the lower right corner.

Step 5:   Make sure "*RUN SERVER SUITESCRIPT and TRIGGER WORKFLOWS*" is checked, then

Click **NEXT** in the lower right corner. (be sure to check "Run server script..."

---

iTPM

Step 6:

Click [Next >] in the lower right corner

Step 7: Click the drop down menu and click RUN.

Ignore this warning that you are not saving. Click **OK**.
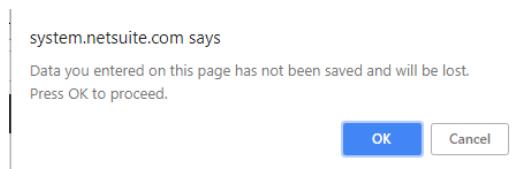
Step 8: Wait for your CSV import file to be processed. Your CSV import goes into the import queue. It could be delayed if there are many other uploads in progress, and/or if someone is uploading a very large amount of data..

When your CSV file is successfully uploaded, you will get an email status update:

NetSuite CSV Import (- iTPM Plan import) Notification (originally To: Alex.Ring@CGsquared.com)

NetSuite (nlmailer@netsuite.com) <system@sent-via.netsuite.com>
To ✅ Alexander Ring

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.

Greetings from NetSuite!

Thank you for using the CSV Import Assistant. The status of your import is Completed.

Type of records imported: - iTPM Plan
Job Name: - iTPM Plan - iTPMPlan-import-test.csv - Alex.Ring@CGsquared.com
File Name : iTPMPlan-import-test.csv
Import Map Name : - iTPM Plan import
Date and time of import: 06/28/2022
Number of records imported: 2
Number of records not imported: 1

If any records were not imported:
1) Visit the Import status page at https://tstdrv1500375.app.netsuite.com/app/setup/upload/csv/csvstatus.nl
2) On the Import status page, download the zip file of the record(s) that failed to import.
3) Review the error message(s) provided for each failed record and resolve the error(s).
4) Return to the CSV Import Assistant and re-import the record(s).

Sincerely,
The NetSuite Staff

PLEASE DO NOT RESPOND TO THIS MESSAGE

ⓘ **Helpful Hint:** CSV imports is an advanced feature. Data in your CSV files must **exactly** match the data in NetSuite to successfully create promotions by CSV import. That's why we suggest you use Excel v-lookups and drop-down menus to populate key fields in your spreadsheets. Example: customer, item, and other fields that require an exact match for the import.

We suggest you work with your NetSuite administrator and/or your *i*TPM Administrator for help using NetSuite CSV files.

ⓘ **Helpful Hint:** Celigo has an Excel add-in for NetSuite called CloudExtend that replaces the NetSuite CSV import process with a one-click upload.
For more information, go to www.cloudextend.io , or email zachary.smitson@celigo.com or support@cgsquared.com.

cloudextend
by celigo

*i*TPM

7.3 CSV Do's and Don't

Here are some helpful hints for using CSV files with NetSuite:

⚠️ **Note: Only files with the .CSV extension will work with *CSV imports (CSV)*.** If you use Excel to create your file, be sure to use SAVE AS and save your file in the *CSV (Comma delimited) (*.csv)* format.   .XLS extensions files will not work.
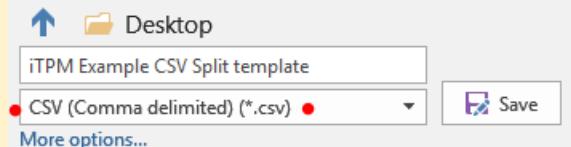
Note: Only files using *CSV (Comma delimited) (*.csv)* will work. NetSuite imports will not work with other encoding formats.

Note: We suggest using a different filename each time you do a CSV import..

Note: Do NOT put commas or currency signs, like "$" in your amounts. Enter $1,020.15 as 1020.15

Note: Do NOT change column names. NetSuite needs the column names to match the data to the correct fields in the deduction.

Note: Use the date format that matches your NetSuite account. Example, if NetSuite is configured to accept dates as MM/DD/YYYY, then that is how you should enter dates in your CSV import file.   *i*TPM only supports these date formats for CVS imports: DD/MM/YYYY, M/D/YYYY, and MM/DD/YYYY.

ⓘ **Helpful Hint:** Use standard NetSuite to check on your CSV imports. In the global search, type CSV status and choose *View CSV Import Status*,
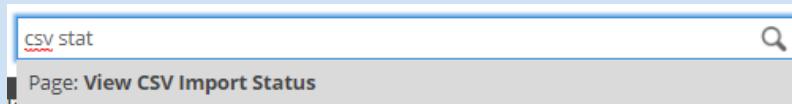
You can also go to *Setup -> Import / Export -> View CSV Import Status* to check on the status of your import.

⚠️ **Note**: When importing percentages, NetSuite accepts
In *i*TPM 24.1.1 and newer, you can upload Event Plan percentages from Excel as either 10 or 10%, for 10%. (Excel stores 10%) Any percentage that is between 0 and .01 will be multiplied by 100, so .01 will become 10%.

7.4 Advanced feature: use a unique 'External ID' to 'ADD OR UPDATE'

Creating and using an External ID for CSV imports is an advanced feature.

There are three options for NetSuite saved CSV imports:

Import Assistant

STEPS

✔ 1 Scan & Upload CSV File

2 Import Options

Import Options

Data Handling
- ⦿ ADD
- ○ UPDATE
- ○ ADD OR UPDATE
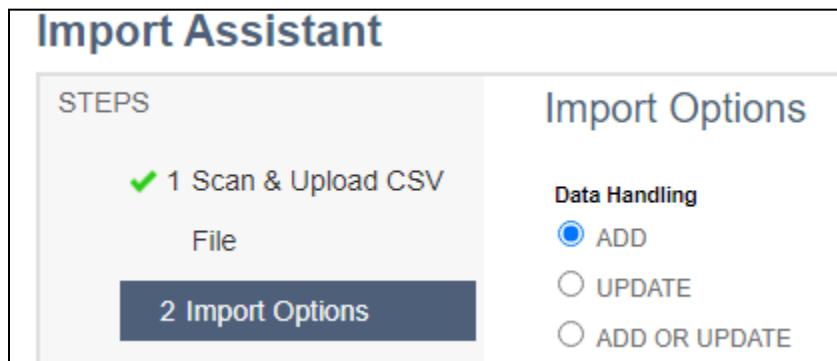
- ADD   This always creates a new record in NetSuite if the data is valid
- UPDATE   This ONLY updates existing records. No new records are ever created.
- ADD or UPDATE   This updates existing records, and creates new ones if one does not exist.

The standard saved CSV imports are set to ADD new records.

- Pros: An External ID is not required.
- Cons: You'll create duplicate records in NetSuite if you import the same or a modified version of your CSV import file multiple times. *i*TPM will identify these duplicate records, but it will take an extra step to delete the duplicates, or check "Ignore?" in the duplicates.

If you want to use an External ID for your CSV imports, email support@cgsquared.com for help.

⚠ **Note**: The EXTERNAL ID must be unique across all customers, items, users, etc.
if you use the "ADD or UPDATE" option and the external id is not unique, the CSV import will overwrite existing data in NetSuite.

ⓘ **Helpful Hint:** NetSuite has a unique number for each Event plan and Monthly Forecast. However, NetSuite users have no control over the internal ID. The internal ID is created by NetSuite when you create your plan or forecast through the browser or through a CSV import.

Populating an External ID is optional. If you decide to use an external ID, you control the value in your CSV import template file, and in your customized NetSuite saved CSV import.

CG Squared, Inc. and this User Guide

CG Squared designs, develops and supports the *i*TPM SuiteApp.   CG Squared, or CG², is short 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 Annual Planning

*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 *i*TPM users that create and manage trade promotions. Annual planning is one of four integrated *i*TPM modules. There is a separate User Guide for Administrators.

This manual has been designed for two-sided printing to save paper!

We invite you to follow our *i*TPM blog at www.i-TPM.com.
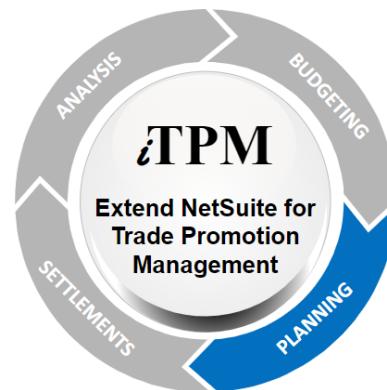
Because we publish updates to *i*TPM at least twice each year, features and screenshots in this User Guide may not exactly match what you see in *i*TPM.   This document is not intended to be a reference for NetSuite features, functionality and version releases.

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