

iTPM

26.2.1

Summer 2026 Update Release Notes



BFN Certified every 6 months.

June 2026
Revised June 13, 2026

New Features in iTPM 26.2.1

Deductions

- [1.](#) S-08796: CSV Splits now run in real time.
- [2.](#) S-08844: No more 40 row limit for SPLIT LINES.
- [3.](#) S-08686: Create deductions from credit memos which are in a different currency than the subsidiary currency.
- [4.](#) S-08796: Deduction Refactoring: Populate "Class, or item" in iTPM Expense Journals.
- [5.](#) S-08852: iTPM Preference checkbox option: Require reason code for deduction expense by journal.

Promotion Planning

- [6.](#) S-03414: Option for Mass Copy Promotion to copy promotions to another customer.
- [7.](#) S-08345: Mass Update Promotion admin tool for promotions.

Accruals

- [8.](#) S-08811: Add new 'saved search' summary field in the promotion under the *iTPM Accruals* subtab.

Applying Off-Invoice

- [9.](#) S-08759: Option to Change the discount item description to just the promotion #.
- [10.](#) S-08411: Option for sales order line level 'override' to skip iTPM discounts.
- [11.](#) S-08627: Configurable column name in the SO Price Analysis report.
- [12.](#) S-08570: Freeze the first two columns in the SO Price Analysis report to see item and row ID for horizontal scrolling.

Note: Go to **Technical Release notes for 26.2.1** at www.i-TPM.com/admin-training-resources to see a list of the 50+ changes to iTPM in 26.2.1

1. CSV Splits run in real time

Benefits: No more waiting for the CSV upload.

Review the split data in real time before you click SUBMIT to execute the splits.

Correct split data in real time as needed.

	A	B	C	D	E	F	G	H
1	Deduction_ID	Split_Amount	Split_Disputed?	Split_Memo	Split_ReferenceCode	Split_ReferenceDate	Split_ReasonCode	Expense?
2	- iTPM Deduction #1339	94.89	NO	Post Audit	50450005252A	6/2/2025		NO
3	- iTPM Deduction #1339	11.31	NO	Post Audit	50450006337B	6/2/2025		NO
4	- iTPM Deduction #1339							NO
5	- iTPM Deduction #1339							YES

- iTPM Deduction

Deduction Split (CSV) Form

UPLOAD CSV FILE *

Demo-Split-...DN1339.csv

- iTPM Deduction Split List Search More

Deduction Details

ITPM DEDUCTION
- iTPM Deduction #1339

DEDUCTION SUBSIDIARY
Honeycomb Holdings Inc. : Honeycomb Mfg.

ITPM AMOUNT
10,000.00

ITPM OPEN BALANCE
10,000.00

TOTAL LINE AMOUNT
10,000.00

REMAINING AMOUNT
0.00

ITPM SPLIT PROCESS COMPLETED?

ITPM IMPORT COMPLETED?

RESOLVE CLASS
Consumer Goods

RESOLVE ITEM
Sales

RESOLVE DEPARTMENT
01: San Francisco

INACTIVE

CUSTOM FORM *
- iTPM Deduction Split Form

CSV FILE
Demo-Split-by-CSV-file-with-resolve-classifi

SPLITS	NOTES	FILES											
SPLIT REFERENCE CODE	SPLIT MEMO	SPLIT AMOUNT	SPLIT DISPUTED?	SPLIT DEDUCTION	SPLIT REFERENCE DATE	SPLIT REASON CODE	EXPENSE?	PREVIOUS PERIOD?	RESOLVE CLASS	DEDUCTION SUBSIDIARY	RESOLVE ITEM	RESOLVE LOCATION	RESOLVE DEPARTMENT
50450005252A	Post Audit	94.89			6/2/2025				Consumer Goods	Honeycomb Holdings Inc. : Honeycomb Mfg.		01: San Francisco	Sales
50450006337B	Post Audit	11.31			6/2/2025				Consumer Goods	Honeycomb Holdings Inc. : Honeycomb Mfg.		01: San Francisco	Sales
1239238414C	Duplicate claim	24.58			6/2/2025				Consumer Goods	Honeycomb Holdings Inc. : Honeycomb Mfg.		01: San Francisco	Sales

2. Remove 40 row limit for SPLIT LINES.

Benefits: Split your deduction with fewer mouse clicks when credit memo has the detail.

The screenshot displays the i-TPM Deduction interface for entry 7629. The interface includes a top navigation bar with 'List', 'Search', and 'Customize' options. Below the entry number, there are several action buttons: 'Edit', 'Back', 'Non G/L Changes', 'Quick Split', 'Split Lines', 'Split (CSV)', 'Split', 'Re-Invoice', 'Quick Expense', 'Expense', 'Settlement', 'Delete', 'Change Customer', and 'Actions'. The 'Split Lines' button is highlighted with a blue arrow pointing to the table below.

The table below shows the following data:

ACCOUNT	DEBIT	CREDIT	MEMO	NAME	CLASS	HISTORY
1999 iTPM Open Deductions		10.50	Deduction applied on CreditMemo MEM00000399 23432	Walmart		History
1999 iTPM Open Deductions		12.12	Deduction applied on CreditMemo MEM00000399 66345	Walmart		History
1999 iTPM Open Deductions		94.89	Deduction applied on CreditMemo MEM00000399 50450005252A	Walmart		History
1999 iTPM Open Deductions		11.31	Deduction applied on CreditMemo MEM00000399 50450006337B	Walmart		History
1999 iTPM Open Deductions		24.58	Deduction applied on CreditMemo MEM00000399 12392338414C	Walmart		History
1999 iTPM Open Deductions		27.39	Deduction applied on CreditMemo MEM00000399 11291676046D	Walmart		History
1999 iTPM Open Deductions		30.32	Deduction applied on CreditMemo MEM00000399 A11291677503	Walmart		History
1999 iTPM Open Deductions		30.89	Deduction applied on CreditMemo MEM00000399 B31231997431	Walmart		History
1999 iTPM Open Deductions		37.07	Deduction applied on CreditMemo MEM00000399 C12392340014	Walmart		History
1999 iTPM Open Deductions		42.03	Deduction applied on CreditMemo MEM00000399 C50450006336	Walmart		History
1999 iTPM Open Deductions		83.20	Deduction applied on CreditMemo MEM00000399 DE36236545196	Walmart		History

3. Create deductions from CM which are in a different currency than the subsidiary currency.

Benefits: You don't need a separate subsidiary to manage deductions in the currency

Credit Memo MEM00000307 AFES (Euros) OPEN

Subsidiary Primary Currency: USD

Deduction

Primary Information

CREDIT #	MEM00000307	PO #	
CUSTOMER	AFES (Euros)	MEMO	Testing S-03776
PROJECT		PARTNER	

Limitation: Promotional Settlements are not supported yet in 26.2.1, only splits, iTPM journals, and statement charges.

NetSuite Configuration: The iTPM Clearing Account GL must be available for customer's currency.

- iTPM Deduction

Save **Cancel**

Primary Information

ENTRY NO. To Be Generated	ITPM CUSTOMER * AFES (Euros)	RESEARCH STATUS	TRANSACTION * Credit Memo #MEM00000307	ORIGINAL DEDUCTION <Type then tab>
ITPM OTHER REFERENCE CODE	DATE * 11/15/2022	NEXT STEPS	<input type="checkbox"/> DISPUTED?	PARENT DEDUCTION <Type then tab>
ITPM OTHER REFERENCE CODE #2	POSTING PERIOD Jun 2026	GROUP	<input type="checkbox"/> CUSTOMER APPROVES REPAY?	ITPM APPLIED TO <Type then tab>
STATUS Open	REFERENCE DATE		<input type="checkbox"/> DEDUCTION INCLUDES TAX	CURRENCY * Euro
			TAX RATE	

4. Change deduction 'resolve' classifications: Class, Department and Location

Benefits: Change the classification in the deduction, even when the deduction period is closed. Option to identify a specific item for your non-promotional journal resolutions.

- iTPM Deduction 🔍

7000
OPEN

Edit
Back

Non G/L Changes
Quick Split
Split (CSV)
Split
Re-Invoice
Quick Expense
Expense
Settlement
Delete
Change Customer

Actions

▼ Primary Information

ENTRY NO. 7000	ITPM CUSTOMER Ahold	RESEARCH STATUS	TRANSACTION <u>Credit Memo #MEM00000394</u>	ORIGINAL DEDUCTION - iTPM Deduction #6993
ITPM OTHER REFERENCE CODE 3	DATE 05/14/2026	NEXT STEPS	<input type="checkbox"/> DISPUTED?	PARENT DEDUCTION - iTPM Deduction #6998
ITPM OTHER REFERENCE CODE #2	POSTING PERIOD May 2026	GROUP	<input type="checkbox"/> CUSTOMER APPROVES REPAY?	ITPM APPLIED TO - iTPM Deduction #6998
STATUS Open	REFERENCE DATE		<input type="checkbox"/> DEDUCTION INCLUDES TAX	CURRENCY USA
			TAX RATE 0	

▼ Classification

SUBSIDIARY Honeycomb US-East	RESOLVE DEPARTMENT Production : Assembly	RESOLVE CLASS Furniture : Office	RESOLVE LOCATION 01: San Francisco	RESOLVE ITEM ACC00002
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26.2.1 Update

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4. Non G/L change button: Change deduction 'resolve' classifications

Benefits: Change classifications to be used in non-trade resolutions, even when the period is closed.

NON G/L CHANGES More

▼ Deduction Details

SUBSIDIARY CG Squared, Inc. : Honeycomb US-East	DEDUCTION - ITPM Deduction #9392	DEDUCTION AMOUNT 1,000.00
CUSTOMER Walmart	STATUS Open	OPEN AMOUNT 1,000.00

▼ Resolution Classifications

RESOLVE CLASS Consumer Goods	RESOLVE DEPARTMENT Production	RESOLVE LOCATION 01: San Francisco	RESOLVE ITEM <Type then tab>
---------------------------------	----------------------------------	---------------------------------------	---------------------------------

▼ Assigned Representative

ASSIGN TO Clark Koozer	<input type="checkbox"/> CHANGE ASSIGN-TO TO THE REASON CODE APPROVER REASON CODE APPROVER	<input type="checkbox"/> CHANGE ASSIGN-TO TO BASED ON THE CUSTOMER SALES REP? CUSTOMER SALES REP Clark Koozer
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▼ Other Details

ITPM OTHER REFERENCE CODE 454454	REASON CODE	RESEARCH STATUS	MEMO 9817311 Check# 636532
ITPM OTHER REFERENCE CODE 2	REFERENCE DATE 09/07/2019	NEXT STEPS	APPROVAL NOTES
<input type="checkbox"/> DISPUTED?	DUE DATE / FOLLOW-UP DATE 06/11/2026	GROUP	ADD NOTES
<input type="checkbox"/> CUSTOMER APPROVES REPAY?		EXTERNAL BACKUP URL	

4. SPLIT and Split Lines and CSV Split: Change deduction 'resolve' classifications

- iTPM Deduction Split List Search Customize More

Save **Cancel**

CUSTOM FORM *
- iTPM Deduction Split Form

INACTIVE

ITPM DEDUCTION
- iTPM Deduction #6997

ITPM AMOUNT
500.00

ITPM OPEN BALANCE
400.00

ITPM SPLIT PROCESS COMPELETED?
 ITPM IMPORT COMPLETED?

DEDUCTION SUBSIDIARY
CG Squared, Inc. : Honeycomb US-East

RESOLVE CLASS

RESOLVE ITEM

RESOLVE DEPARTMENT
Production

RESOLVE LOCATION
02: Boston

TOTAL LINE AMOUNT
250.00

REMAINING AMOUNT
150.00

Splits Notes Files

SPLIT REFERENCE CODE	SPLIT MEMO	SPLIT AMOUNT *	SPLIT DISPUTED?	SPLIT DEDUCTION	SPLIT REFERENCE DATE	SPLIT REASON CODE	EXPENSE?	PREVIOUS PERIOD?	RESOLVE CLASS	DEDUCTION SUBSIDIARY	RESOLVE ITEM	RESOLVE LOCATION	RESOLVE DEPARTMENT
123		250.00								CG Squared, Inc. : Honeycomb US-East		02: Boston	Production
456		200.00				Compliance				CG Squared, Inc. : Honeycomb US-East		02: Boston	Sales

Add **Cancel** **Insert** **Remove**

Splits default to 'resolve' classifications from deduction to be split.

Option to override the default 'resolve' classifications

Option to override the default 'resolve' classifications

4. Expense and CSV Bulk Expense: Change Classifications in iTPM journals:

- iTPM Deduction

7000 **OPEN**

Edit **Back** **Non G/L Changes** **Quick Split** **Split (CSV)** **Split** **Re-Invoice** **Quick Expense** **Expense** **Settlement** **Delete** **Change Customer**

> **Primary Information**

▼ **Classification**

SUBSIDIARY Honeycomb US-East	RESOLVE DEPARTMENT Sales	RESOLVE CLASS Consumer Goods	RESOLVE LOCATION 01: San Francisco	RESOLVE ITEM ACC00002
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- iTPM Expense Queue

iTPM_EQ0616

Edit **Back**

▼ **Queue Information**

ITPM DEDUCTION - iTPM Deduction #7000	OPEN BALANCE	EXPENSE JOURNAL ENTRY Journal #JOU00009869	PROCESSING NOTES
DEDUCTION SUBSIDIARY CG Squared, Inc. : Honeycomb US-East		ACCOUNT 5040 Damaged Goods	

▼ **Requested Resolution**

REASON CODE Damages	REQUESTED EXPENSE AMOUNT 12.50	MEMO Example resolution with class and item	<input type="checkbox"/> POST TO PREVIOUS PERIOD?
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▼ **Resolution Classifications**

RESOLVE LOCATION 01: San Francisco	RESOLVE DEPARTMENT Sales	RESOLVE CLASS Consumer Goods	RESOLVE ITEM ACC00002
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5. iTPM Preference option to require reason code for non-promotional resolutions.

Benefits: Prevent incorrect iTPM journal resolutions because of missing reason codes.

- iTPM Preferences More

SUBSIDIARY
CG Squared, Inc. : Honeycomb US-East

Setup Promotion Planning Configuration **Deduction Management Configuration** Settlement Configurations Off-Invoice configurations Accrual Configurations

NEW DEDUCTION ALWAYS HAS CURRENT DATE
 POPULATE CUSTOMSEGMENT?
 ASSIGN TO CUSTOMER SALES REP WHEN CREATED OR SPLIT
 DO NOT CHANGE DEDUCTION ASSIGN-TO ON SPLIT
 ITPM EXPENSE QUEUE REC TYPE ID
 - iTPM Expense Queue
 ITPM DEDUCTION APPROVAL BY SALES REP REC TYPE ID
 - iTPM Deduction Approval by Sales
 ITPM DEDUCTIONS DELETE PERMISSION REC TYPE ID
 - iTPM Deductions Delete Permission
 ITPM DEDUCTIONS PERMISSION REC TYPE ID
 - iTPM Deductions Permission

ITPM DEDUCTION RECORD TYPE ID
 - iTPM Deduction
 ITPM DEDUCTIONS CHANGE CUSTOMER PERMISSION REC TYPE ID
 - iTPM Deductions Change Cust Permission
 ITPM DEDUCTION SPLIT REC TYPE ID
 - iTPM Deduction Split
 ITPM CREATE DDN FROM JE PERMISSION REC TYPE ID
 - iTPM Create DDN from JE Permission
 DEDUCTION BUTTON ENABLED ON JOURNAL ENTRIES
 AUTO-APPROVE ITPM EXPENSE QUEUE JES
 AUTO-APPROVE ITPM QUICK EXPENSE JES

INCLUDE MATCHING PROMOTIONS ACROSS ALL SUBSIDIARIES
 CUSTOMER ATTRIBUTE
 employee
 CUSTOMER ATTRIBUTE FIELD ID ON CUSTOMER RECORD
 salesrep
 ITPM CUSTOMER ATTRIBUTE
 salesrep
 ATTACH FILES DEDUCTION FOLDER ID
 SHOW ATTACH FILES BUTTON ON DEDUCTION
 REQUIRE REASON CODE FOR DEDUCTION EXPENSE JOURNAL ENTRIES?

Insufficient Information

A reason code is required to expense this deduction. Please edit the Deduction using the "Non G/L Changes" button to select a reason code.

- iTPM Expense Queue List List Search Audit Trail

VIEW w/Filters

+ FILTERS

SHOW INACTIVES EDIT

QUICK SORT 638 — 589 TOTAL: 596

EDIT VIEW	INTERNAL ID	ID	ITPM DEDUCTION	OPEN BALANCE	REASON CODE	ACCOUNT	REQUESTED EXPENSE AMOUNT	EXPENSE JOURNAL ENTRY	PROCESSING NOTES
Edit View	638	ITPM_EQ0638	- iTPM Deduction #9401	300.00			300.00		Reason Code is required as per iTPM Preferences for this Subsidiary.
Edit View	637	ITPM_EQ0637	- iTPM Deduction #9400	0.00	Damages	5040 Damaged Goods	100.00	Journal #JOU00009893	

6. Option to mass copy promotions to another customer

Benefits: Save time if you need to copy many promotions from one customer to another. Set up promotion templates, so users can copy to their customers as needed.

Same dates, copy to another customer option.

MASS Copy Promotions More

Instructions:
Step 1: Set your filter, and what you want to do. (Role restrictions apply)
Step 2: Click SEARCH, and answer "LEAVE" to leave the form.
Step 3: Mark the promotions you want to COPY, and
Step 4: Click SUBMIT

Filters

SUBSIDIARY *
CG Squared, Inc. : Honeycomb US-East

CUSTOMER
Ahold

PROMOTION TYPE

START DATE: 01/01/2025
END DATE: 12/31/2025

OWNER

Select one Radio Button Below

COPY TO NEXT YEAR
 COPY TO NEXT QUARTER
 COPY TO NEXT MONTH
 SAME DATES, COPY TO ANOTHER CUSTOMER

CHANGE OWNER IN THE COPIED PROMOTION TO YOU

CUSTOMER
Aldi

Promotions

TOTAL
2

COPY	PROMOTION ID	PROMOTION NAME	PROMOTION TYPE	CUSTOMER	OWNER	STATUS	CONDITION	SHIP START	SHIP END
<input type="checkbox"/>	51246	Copy from 45745: S-01705	MCB (direct accounts)	Ahold	Susan Ring	Draft	Completed	01/01/2025	12/31/2025
<input type="checkbox"/>	51883	Testing S-07875	MCB with perf dates	Ahold	iTPM Demo	Draft	Completed	11/19/2025	11/19/2025

7. Mass Update Promotion admin tool for promotions

Benefits:

Easy way to trigger:

- KPI refresh
- Contribution allocation
- Period share reset
- Run *Process Plan* for *Draft* promotions
- Reprocess Planning records for approved promotions. (Modify)

Mass Promotion Update

Submit
Search
Reset

Instructions:
 Step 1: Set your filter, and what you want to do. (Role restrictions apply)
 Step 2: Click SEARCH, and answer "LEAVE" to leave the form.
 Step 3: Mark the promotions you want to change, and
 Step 4: Click SUBMIT

▼ Filters

SUBSIDIARY *

CG Squared, Inc. : Honeycomb US-East

CUSTOMER

<Type & tab for single value>

OWNER

- New -
Aiden Somerhalder
Alex Ring
Amy Nguyen
Ananyo Kumar

PROMOTION TYPE

SHIP DATE - START

(Custom)

FROM

01/01/2026

TO

12/31/2026

PROMOTION NAME

ONLY PLANNED SPEND <=> ESTIMATED

ONLY ACCRUALS <=> EXPECTED LIABILITY

DIFFERENCE IS < OR >

0

SHIP DATE - END

(Custom)

FROM

TO

REFERENCE CODE

▼ Actions: Check all that apply

TRIGGER KPI REFRESH

TRIGGER CONTRIBUTION ALLOCATION FOR KPI REFRESH

DELETE PERIOD SHARE / RESET?

RUN PROCESS PLAN FOR DRAFT PROMOTIONS

IS PROMOTION PLANNING COMPLETE?

REPROCESS PLANNING RECORDS (APPROVED STATUS)

Promotion List •

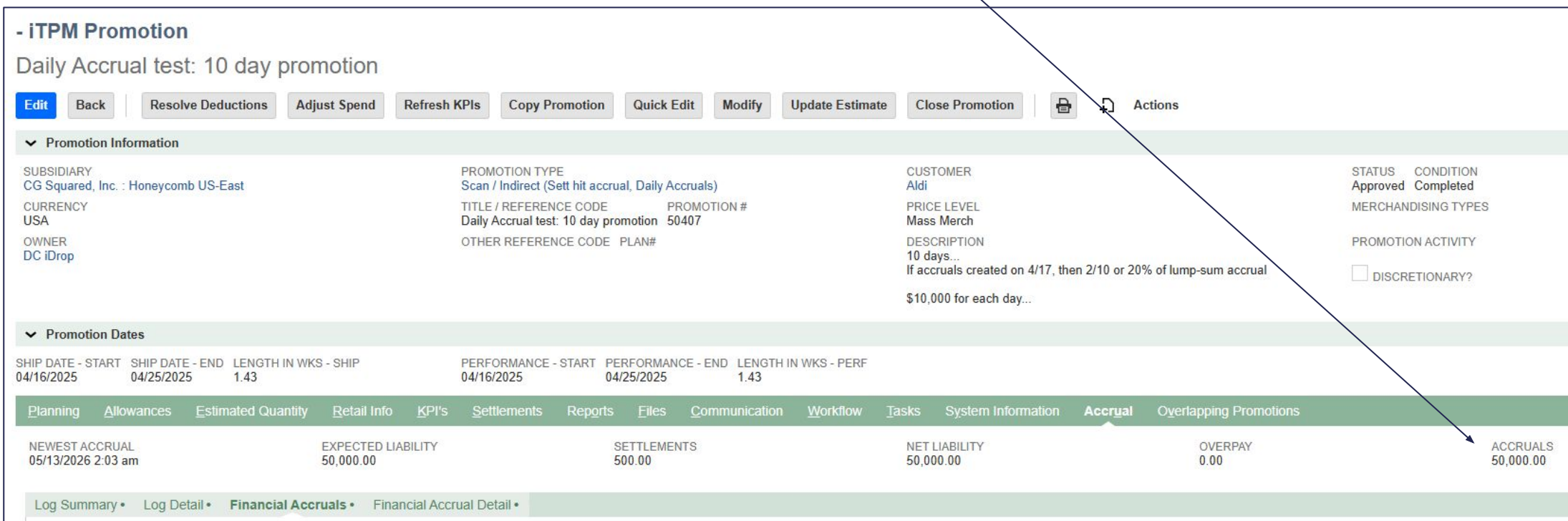
TOTAL 235 Selected: 0

Mark All
UnMark All

UPDATE	ID	PROMOTION	PROMOTION TYPE	CUSTOMER	OWNER	STATUS	CONDITION	SHIP START	SHIP END
<input type="checkbox"/>	51776	2026 January event	Scan / Indirect (Sett hit accrual, Daily Accruals)	Aldi	iTPM Demo	Draft	Completed	01/05/2026	01/11/2026
<input type="checkbox"/>	51890	Broker copy to 2026	Scan / Indirect (Sett hit accrual, Daily Accruals)	Maple Leaf Foods	ABC Broker	Draft	Future	07/15/2026	07/15/2026

8. New Accruals field in the promotion under the *iTPM Accruals* subtab

Benefits: Save time and mouse clicks comparing accruals to promotion KPIs without scrolling.



- iTPM Promotion
Daily Accrual test: 10 day promotion

Edit **Back** **Resolve Deductions** **Adjust Spend** **Refresh KPIs** **Copy Promotion** **Quick Edit** **Modify** **Update Estimate** **Close Promotion** **Actions**

▼ Promotion Information

SUBSIDIARY CG Squared, Inc. : Honeycomb US-East	PROMOTION TYPE Scan / Indirect (Sett hit accrual, Daily Accruals)	CUSTOMER Aldi	STATUS Approved	CONDITION Completed
CURRENCY USA	TITLE / REFERENCE CODE Daily Accrual test: 10 day promotion	PRICE LEVEL Mass Merch	MERCHANDISING TYPES	
OWNER DC iDrop	PROMOTION # 50407	DESCRIPTION 10 days... If accruals created on 4/17, then 2/10 or 20% of lump-sum accrual	PROMOTION ACTIVITY <input type="checkbox"/> DISCRETIONARY?	
	OTHER REFERENCE CODE PLAN#	\$10,000 for each day...		

▼ Promotion Dates

SHIP DATE - START	SHIP DATE - END	LENGTH IN WKS - SHIP	PERFORMANCE - START	PERFORMANCE - END	LENGTH IN WKS - PERF
04/16/2025	04/25/2025	1.43	04/16/2025	04/25/2025	1.43

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

NEWEST ACCRUAL 05/13/2026 2:03 am	EXPECTED LIABILITY 50,000.00	SETTLEMENTS 500.00	NET LIABILITY 50,000.00	OVERPAY 0.00	ACCRUALS 50,000.00
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Log Summary • Log Detail • **Financial Accruals** • Financial Accrual Detail •

9. Option to Change the discount item description to just the promotion

Benefits: Prevent EDI errors when the promotion description is too long.

Off-Invoice configurations

- SHOW NBOI BUTTONS ON SALES ORDER
- ALLOW SALES ORDER LINE LEVEL OVERRIDE
- USE PROMOTION # FOR TRANSACTION ITEM DESCRIPTIONS & LIMIT CHARACTERS?

- SHOW NBOI BUTTONS ON SALES ORDER
- ALLOW SALES ORDER LINE LEVEL OVERRIDE
- USE PROMOTION # FOR TRANSACTION ITEM DESCRIPTIONS & LIMIT CHARACTERS?

ITEM	UOM	AVAILABLE	QTY	DESCRIPTION	PRICE LEVEL	PRICE	AMOUNT
ACC00001	Ea	9,847	1	Digital Single Line Telephone (4400) for support calls	List Price	60.00	60.00
Off-invoice				ACC00001, Promotion: Test OI on SO with many items 10%	Custom	-10.0%	-6.00
Off-invoice				ACC00001, Promotion: Example defective allowance 2% 2%	Custom	-2.0%	-1.20
Off-invoice				ACC00001, Promotion: All items OI for testing. (Start with 1 item) 1%	Custom	-1.0%	-0.60
ACC00004	Ea	18,437	10	Merlin 4412D: The most powerful features avail in a 12 button display phone	List Price	325.00	3,250.00
Subtotal					Custom		3,302.20
Example Header Discount				Promotion: Rz-Test-Header	Custom	-2.0%	-66.04

ITEM	UOM	AVAILABLE	QTY	DESCRIPTION	PRICE LEVEL	PRICE	AMOUNT
ACC00001	Ea	9,847	1	Digital Single Line Telephone (4400) for support calls	List Price	60.00	60.00
Off-invoice				ACC00001, Promo: 517	Custom	-10.0%	-6.00
Off-invoice				ACC00001, Promo: 517	Custom	-2.0%	-1.20
Off-invoice				ACC00001, Promo: 519	Custom	-1.0%	-0.60
ACC00004	Ea	18,437	10	Merlin 4412D: The most powerful features avail in a 12 button display phone	List Price	325.00	3,250.00
Subtotal					Custom		3,302.20
Example Header Discount				Promo: 52006	Custom	-2.0%	-66.04

See Section 5.11 in the *iTPM Off-Invoice User Guide* for more details.

10. Skip applying discounts just on specific lines with .'SO order line 'override'.

Items Address Shipping Messages History iTPM

EXCHANGE RATE * 1.00 PROMOTION Calculate

COUPON CODE <Type then tab>

Add Multiple Upsell Items Intelligent Recommendations Close Remaining Lines Refresh Items from Project Clear All Lines **iTPM Sales Order Price Analysis**

Sales Order Price Analysis •

PAGE Page 1 of 1

Mark All Unmark All

SELECT	LINE ID	ITEM	ITEM DESCRIPTION	SO UOM	PRICE LEVEL	QUANTITY	ITEM PRICE	SO ITEM PRICE	SO DISCOUNTS & MARK-UPS	SO NET PRICE	CUSTOMER REQUESTED PRICE
<input type="checkbox"/>	0	CAR00007									
<input type="checkbox"/>	3	CAR00008									

Benefits: More control over which discounts are applied by line in sales orders.

Override directly in the sales order lines, or use the checkbox in the real-time "iTPM Sales Order Prices Analysis" form.

See Section 3.7 in the Off-Invoice User Guide.

Items Address Shipping Messages History iTPM iTPM Discounts

EXCHANGE RATE 1.00

COUPON CODE

ITEM	UOM	AVAILABLE	QTY	DESCRIPTION	PRICE LEVEL	PRICE	AMOUNT	PROJECT EM	BILLABLE ESTIMATE	iTPM DISCOUNTS APPLIED?	iTPM COMMIT QUANTITY / DISCOUNT	CUSTOMER REQUESTED PRICE	EDI UOM	CUSTOMER REQUESTED PRICE UOM	DO NOT APPLY iTPM ITEM DISCOUNTS	HISTORY
CAR00007	Ea(12/cs)	8,015	25	HP 15 Ink Cartridge - Black	List Price	23.00	575.00			Yes					<input type="checkbox"/>	History
Mark-up				CAR00007, Promotion: 10% Tariff Reclaim 10%	Custom	10.0%	57.50			Yes					<input type="checkbox"/>	History
Off-Invoice				CAR00007, Promotion: Kahe Oil Rate per unit Test UOM \$0.0833/Each(12)	Custom	-2.0833	-2.08			Yes	-2.08				<input type="checkbox"/>	History
CAR00008	Ea(12/cs)	117,442	1	HP 96A Toner - Black	List Price	97.95	97.95								<input type="checkbox"/>	History
Off-Invoice				CAR00008, Promotion: Kahe Oil Rate per unit Test UOM \$0.0833/Each(12)	Custom	-0.0833	-0.08			Yes	-0.08				<input type="checkbox"/>	History
Subtotal					Custom		728.29			Yes					<input type="checkbox"/>	History
Example Header Discount				Promotion: 1% defect allowance on everything	Custom	-1.0%	-7.28			Yes					<input type="checkbox"/>	History
Example Header Surcharge				Promotion: \$25 handling fee per order	Custom	25.00	25.00			Yes					<input type="checkbox"/>	History

11. Configurable column name in the SO Price Analysis report.

Benefits: Prevent confusion by setting the column name to match the configurable field.

Off-Invoice configurations

RATE IN 4 DECIMALS (ALL SUBSIDIARIES)

ONLY PROCESS EXCEPTIONS? (ALL SUBSIDIARIES)

ITPM SHIP DATE FIELD INTERNAL ID (ALL SUBSIDIARIES)

ITPM EDI UOM FIELD INTERNAL ID (ALL SUBSIDIARIES)

ITPM EDI PRICE FIELD INTERNAL ID (ALL SUBSIDIARIES)

ITPM EDI PRICE FIELD NAME (ALL SUBSIDIARIES)

SHOW NBOI BUTTONS ON SALES ORDER

ALLOW SALES ORDER LINE LEVEL OVERRIDE

USE PROMOTION # FOR TRANSACTION ITEM DESCRIPTIONS & LIMIT CHARACTERS?

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 #SLS00106453
CUSTOMER: KeHE
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

DO NOT APPLY ITPM DISCOUNTS?	LINE ID	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 REQUESTED PRICE UOM	ITPM FIXED PRICE	# OF FIXED PRICE DEALS	ITPM UNIT
	1	CAB00004	Storage Cabinet Wood - Honey Oak	Each	List Price	1.0	299.99	299.99	0.000	299.99	0.00	0.00	N/A	0.00	0.00	

12. SO Price Analysis report: Freeze the first two columns for horizontal scrolling

Benefits: Always see the item, item description and row ID when scrolling left and right.

Sales Order Price Analysis More

[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 #SL500106453
 CUSTOMER: KeHE
 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](#).
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■ 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

DO NOT APPLY ITPM ITEM DISCOUNTS?	LINE ID	ITEM	ITEM DESCRIPTION	ITPM Oi: %	ITPM Oi: RATE PER UNIT	ITPM MU PER UNIT TOTAL	ITPM MU: %	ITPM MU: RATE PER UNIT	ITPM: NB % DISCOUNT	ITPM: NB RATE PER UNIT	ITPM EXPECTED NET PRICE	CUSTOMER REQUESTED PRICE VS SO	CUSTOMER REQUESTED PRICE VS ITPM	ITPM PRICE VS SO	MISSING "ALL ITEMS" ITEM ALLOWANCE RECORD	ANY "ALL ITEMS" PROMOTION NOT APPLIED ▲
	1	CAB00004	Storage Cabinet Wood - Honey Oak	0.0%	0.00	0.00	0.0%	0.00	0.0%	0.00	299.99	N/A	N/A	0.00	Yes	No

Update Schedule

The next update is tentatively scheduled for Winter **2027**.

iTPM Anticipated Releases	Anticipated Date Generally Available*
‘Minor’ Updates 26.2.x	As needed. Release date and enhancements may change based on client needs and requests.
‘Major’ Release 27.1.1	Winter 2027. 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