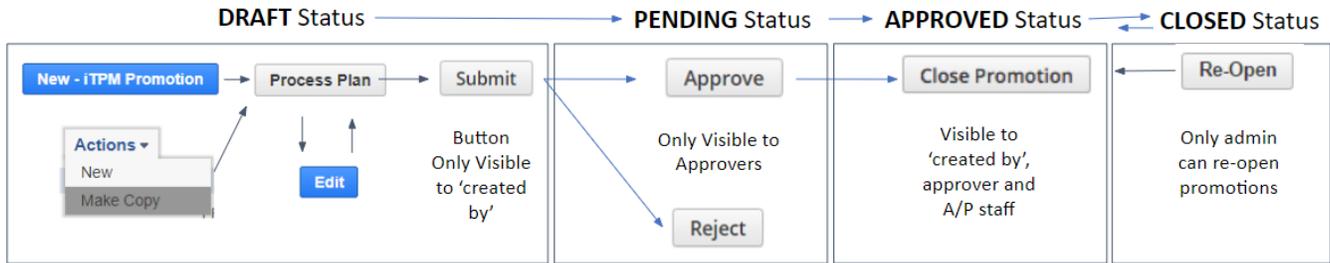


1.0 Get Started

Below is an overview of iTPM promotion workflow:



DRAFT Status:

- 1a. Create a new promotion using *iTPM -> Promotions -> List -> New*
- 2a. Type in the details of your promotion on one page, then **SAVE**
----- or -----
- 1b. Create a new promotion using *Actions / Make Copy*
- 2b. Wait for your promotion to be copied (up to 15 minutes)
- 3. EDIT your promotion if necessary
- 4. **PROCESS PLAN** to validate and expand your plan to allowances, estimated quantity and retail info subtabs. (This can take up to 15 minutes.)
- 5. Review your promotion KPIs. Review the estimated cost of your promotion.
- 6. **SUBMIT** your promotion for approval

PENDING Status

- 7. Someone will APPROVE or REJECT your promotion.

APPROVED status

- 9. When promotions become active or completed, promotions are available to RESOLVE DEDUCTIONS.
Use the promotion KPIs to review deductions and claims matched to each promotion:
 - Compare your estimated promotion cost to the Latest Estimate for the promotion.
 - Review Net Liability; This is what iTPM thinks you owe, but haven't paid yet. (Net Liability = Expected Liability minus Actual Spend.)

CLOSED status

- 10. CLOSE PROMOTION when you think all settlements and claims have been processed. This will 'release' any unpaid Net Liability for this promotion.
- 11. Optional: REOPEN promotion if you get a claim or deduction after you closed the promotion.

User Guides are located at www.i-TPM.com/training-resources



Note: This user manual is written with the assumption that iTPM users are already familiar with NetSuite and have received basic NetSuite training on navigation and features. If you are new to NetSuite, first read the **NetSuite Basics User Guide**, located at www.i-TPM.com/training-resources