

# Ignite Your Margin

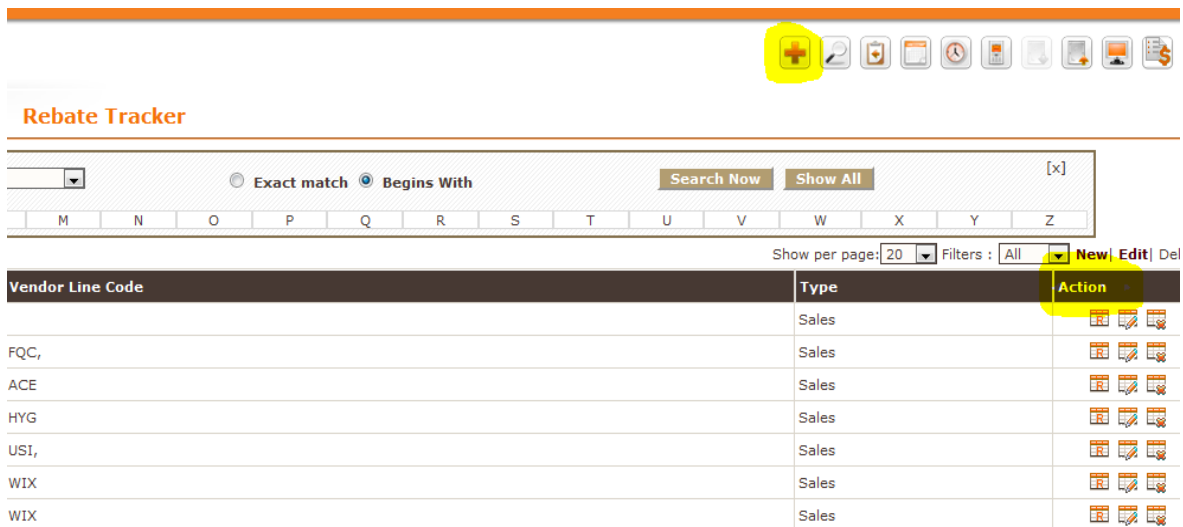
## ***REBATE TRACKER***

Rebate trackers can be used to help in managing vendor offered rebates. If you have vendors that offer rebates based on sales made of their product, you can set up a rebate tracker to help consolidate the data needed to provide them with reporting.






















The Rebate Tracker can be found under IGNITE YOUR MARGINS > REBATE TRACKER.

On the Rebate Tracker listings page you can see a list of all rebate trackers that you have created. You can do searches and filters on them like on any other listings page. You can also select to either edit or delete previously created rebate trackers from this page under the ACTION column.

If you want to create a new Rebate Tracker use the + button at the top right.



The screenshot displays the 'Rebate Tracker' interface. At the top, there is a toolbar with several icons, including a prominent yellow '+' button for creating a new tracker. Below the toolbar, the 'Rebate Tracker' title is followed by a search bar with a dropdown menu, radio buttons for 'Exact match' and 'Begins With', and buttons for 'Search Now' and 'Show All'. A letter navigation bar (M-Z) is also present. The main section shows a table with columns for 'Vendor Line Code', 'Type', and 'Action'. The 'Action' column contains icons for 'New', 'Edit', and 'Del'. The table lists several trackers, all of type 'Sales', with vendor line codes FQC, ACE, HYG, USI, WIX, and WIX. The 'Show per page' is set to 20, and the 'Filters' are set to 'All'.

Vendor Line Code	Type	Action
	Sales	  
FQC,	Sales	  
ACE	Sales	  
HYG	Sales	  
USI,	Sales	  
WIX	Sales	  
WIX	Sales	  

**Vendor Name** - The first step in creating a Rebate Tracker is to choose the vendor offering the rebate.

**Vendor Line Code** – Designate the LINE codes for the products eligible for the rebates.

**Includes Returns** – Choose Yes or No. When reporting to your vendor, do they give you a rebate on everything sold, or everything sold less returns?

**Customer Type From** – If you must include a customer identification choose the field from the account record from which to pull the number. If you don't need a number, choose a field that is blank in your account records.

**Purchasing / Sales** – Designate whether the rebate is available based on purchases you make from the vendor or sales of their product made to your customers.

The screenshot shows the 'Create Rebate Tracker' form. At the top, there is a 'Rebate Trackers' tab and a 'Create Rebate Tracker' button. Below this, there is a 'Rebate Tracker' section with a 'Save' and 'Cancel' button. The form contains several fields: 'Vendor Name' (text input), 'Vendor Line Code' (text input), 'Includes Returns' (dropdown menu set to 'No'), 'Customer Type From' (dropdown menu set to 'Ford Customer Type'), and 'Purchasing / Sales' (radio buttons for 'Purchasing' and 'Sales', with 'Sales' selected). At the bottom, there are 'Save' and 'Cancel' buttons.

Once into the Rebate Tracker “Edit Rebate Rules” page you are presented with a number of options.

The first thing you will want to do is to “create” the rebate levels and attach accounts to them. Click on Accounts/Rebate Levels.

The screenshot shows the 'Add Rebate Tracker Rule' form. At the top, there is a 'Rebate Tracker' section with a 'Save' and 'Cancel' button. The form contains several fields: 'Vendor Name' (text input set to 'Training'), 'Vendor Line Code' (text input set to 'TRN'), and 'Includes Returns' (dropdown menu set to 'Yes'). Below this, there is a yellow button labeled 'Accounts/Rebate Levels'. At the bottom, there is a 'Product Division' checkbox. The form also has a 'Line Code' field (text input set to 'TRN') and a 'Subline' field (text input set to '1').

When creating the rebate level you want to use a naming convention that allows you to quickly recognize the specific rebate you are building. For example if I were creating a rebate for all ACE products, I might call it ACE REBATE. If it's more specific I might use names like WIX/HVY Rebate or WIX/LIT Rebate. At this point you aren't actually building the rebates, just setting up the rebate level and assigning accounts to it.

Add Accounts/Rebate Levels

Add Rebate Levels

rebate from TRN vendor

Add Rebate Level

Select Accounts and Rebate Level

☒ Account
☐ Sales Group

Type to search Account

#27 BLACK'S TIRE AND SERVICE  
#28 BLACKS TIRE AND SERVICE  
#29 BLACK'S TIRE AND SERVICE  
#30 BLACK'S TIRE AND SERVICE  
#33 BLACK'S TIRE AND SERVICE  
#34 BLACKS TIRE SERVICE  
#35 BLACKS TIRE SERVICE  
#38 BLACK'S TIRE  
130 TIRE  
130 AUTOMOTIVE  
188TH BST

Select All / Select None

Select Rebate Level

Save Level

Rebate Tracker Levels For Accounts

Accounts Number	Accounts Name	Rebate Level	Delete
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Once you have named the rebate level, click on Add Rebate Level. You will see a notification that the rebate level was added successfully. At this point, select either the accounts or sales groups that are eligible for the rebate, then use the Select Rebate Level drop down at the right to select the rebate level you have just created. Once done with this click on Save Level.

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Add Accounts/Rebate Levels

Add Rebate Levels

Add Rebate Level

Select Accounts and Rebate Level

☒ Account
☐ Sales Group

Type to search Account

HADDOCK COLLISION CENTER  
HAGLER FARMS  
HAIR ROOFING- DARRYL  
HALES USED CARS  
HALL'S FARMS INC  
HALL'S MOTOR CO  
HALLMAN'S AUTO REPAIR  
HALLS BODY SHOP  
HALLS GARAGE  
HALLS TURKEY FARMS  
HAMILTON LOCKSMITH  
HAMILTON STAPLES

rebate from TRN vendor

Select All / Select None

Save Level

Rebate Tracker Levels For Accounts

Accounts Number	Accounts Name	Rebate Level	Delete
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Once you have done this, the Rebate Tracker Levels For Accounts will be available.

Add Accounts/Rebate Levels

HAIR ROOFING- DARRYL  
HALES USED CARS  
HALL'S FARMS INC  
HALL'S MOTOR CO  
HALLMAN'S AUTO REPAIR  
HALLS BODY SHOP  
HALLS GARAGE  
HALLS TURKEY FARMS  
HAMILTON LOCKSMITH  
HAMILTON STAPLES

Select All / Select None

Save Level

Rebate Tracker Levels For Accounts

Accounts Number	Accounts Name	Rebate Level	Delete
2450.3	#27 BLACK'S TIRE AND SERVICE	rebate from TRN vendor	
2450.8	#28 BLACKS TIRE AND SERVICE	rebate from TRN vendor	
2450.5	#30 BLACK'S TIRE AND SERVICE	rebate from TRN vendor	
418260	HALLS GARAGE	rebate from TRN vendor	

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Once you have built a Rebate Level and assigned accounts to it you can begin to build the actual rebate data into the level. Under the section titled “Add Rebate Tracker Rule” you build the actual rebate information.

**Accounts/Rebate Levels**

**Add Rebate Tracker Rule**

<b>Line Code</b>	TRN
<b>Subline</b>	1
<b>Product Division / Product Number</b>	<input type="checkbox"/> <b>Product Division</b> <input type="text"/> <input type="checkbox"/> <b>Product Number</b> <input type="text"/>
<b>Rebate Level</b>	rebate from TRN vendor ▼ <b>Delete Level</b>
<b>Rebate Percentage</b>	5 (##.##)
<b>Based on M-field</b>	M1 ▼
<b>Max GP %</b>	(##.##)

**Save Rule** **Cancel**

**Line Code** – enter the line code that the rebate applies to

**Subline** – enter the subline that the rebate applies to (if applicable)

**Product Division / Product Number** – enter the product division or product number that the rebate applies to (if applicable). Also, check the box next to an option that you are using in your rebate tracker.

**Rebate Level** – at this point you are going to use the drop down to select the rebate level you have previously established.

**Rebate Percentage** – enter the rebate percentage applicable to the Line Code, subline, product division, and product number you are working with in this particular rebate level.

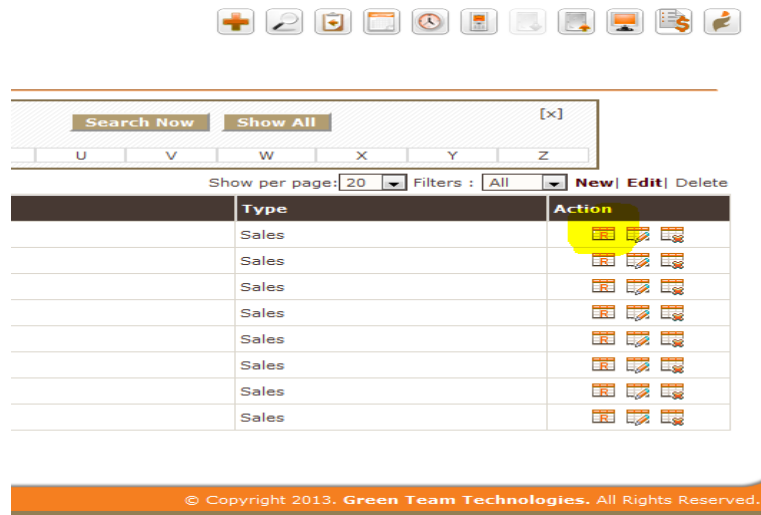
**Based on M-Field** – enter the Mfield from the product records that this rebate level is based on. As an example, a vendor may give you a rebate based on jobber cost which you may have saved as M3. If that's the case you would put M3 here.

**Max GP%** - set the maximum GP% you are allowed to sell at if one exists in the rebate plan. If this isn't a factor in your rebate program because either the vendor doesn't care or you have restricted based on the M Field you sell from, you could just set at 100%.

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Once you have selected all of this criteria, select **SAVE RULE**. The rebate tracker has now been created.

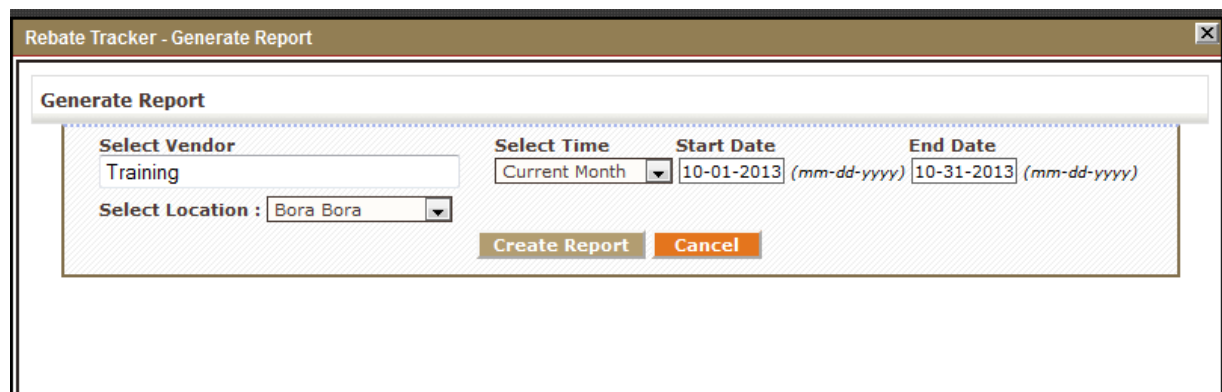
In order to run a rebate tracker to submit to your vendor / manufacturer go to **IGNITE YOUR MARGIN > REBATE TRACKER**. Using the “Generate Report Now” button from under the Action column you can run your rebate report.



The screenshot shows a web application interface for a Rebate Tracker. At the top, there is a toolbar with icons for adding, deleting, and other functions. Below the toolbar is a search bar with "Search Now" and "Show All" buttons. A table displays sales data with columns for "Type" and "Action". The "Action" column contains icons for generating reports. The table has 8 rows of "Sales" data. Below the table, there is a footer with copyright information: "© Copyright 2013. Green Team Technologies. All Rights Reserved."

Type	Action
Sales	[Generate Report Icon]
Sales	[Generate Report Icon]
Sales	[Generate Report Icon]
Sales	[Generate Report Icon]
Sales	[Generate Report Icon]
Sales	[Generate Report Icon]
Sales	[Generate Report Icon]
Sales	[Generate Report Icon]

Once you have selected to generate the report.....



The screenshot shows a dialog box titled "Rebate Tracker - Generate Report". Inside the dialog, there is a "Generate Report" section with the following fields:

- Select Vendor:** Training
- Select Time:** Current Month
- Start Date:** 10-01-2013 (mm-dd-yyyy)
- End Date:** 10-31-2013 (mm-dd-yyyy)
- Select Location:** Bora Bora

At the bottom of the dialog, there are two buttons: "Create Report" and "Cancel".

**Select Time** – you can choose Custom, and select a specific start and end date, or from among the alternate time periods available.

**Start Date** – you can set a start date if it's a temporary rebate program. If not, leave this field blank.

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You can select a date range when pulling your report (monthly) to submit to your vendor.

**End Date** - – you can set an end date if it's a temporary rebate program. If not, leave this field blank. You can select a date range when pulling your report (monthly) to submit to your vendor.

**Select Location** – you can choose a single location, or more than one.

Once you select Create Report you will have a number of options to export or view it.

Rebate Tracker - Generate Report

**Generate Report**

Select Vendor: UNI-SELECT USA (10)      Select Time: Last 90 Days      Start Date: 07-28-2013 (mm-dd-yyyy)      End Date: 10-25-2013 (mm-dd-yyyy)

Select Location: All Location      **Create Report**      **Cancel**

Format: ☒ HTML    ☐ PDF    **View**    **Send Email**    **Export CSV**

**UNI-SELECT USA (10) Rebate Report**

**Fuse5 Staging Server**  
777 Beach Front Dr.  
Bora Bora, South Pacific  
98714  
P: 319-248-5658  
F: 123-123-123  
www.gofuse5.com

**Total Projected Rebate : \$ 5.00**

**UNI-SELECT USA (10)**  
GTT street  
ATLANTA, GA 30384-4675

**Report From 07-28-2013 To 10-25-2013**

Line Code : CEN

**DCS MOTORS INC**  
360 FRANK MELVIN RD., ELIZABETHTOWN, NC

AC Delco PSC Code: 5000      Rebate 10%, Max GP 10%

Product	Line	Sub	Account	SO Date	SO #	Qty	Sell Price	Sell Ext	Gross Profit	Rebate Price	Rebate Ext	Rebate Amount	Max Sp
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You can view or send email in either HTML or PDF format in addition to the option to export as a CSV (spreadsheet). The following is what it looks like in PDF format.

## Fuse5 Training Materials

www.gofuse5.com													
00-20-2013 TO 10-23-2013													
Line Code: CEN													
DCS MOTORS INC													
360 FRANK MELVIN RD., ELIZABETHTOWN, NC													
AC Delco PSC Code: 5000													
Rebate 10%, Max GP 10%													
Product #	Line Code	Sub Line	Account Name #	SO Date	SO #	Qty	Sell Price	Sell Ext	Gross Profit	Rebate Price	Rebate Ext	Rebate Amount	Max SP
12246003	CEN	122	DCSMOTORS INC	07-01-2013	1-216709	1	\$2,297.50	\$2,297.50	97.6%	\$0.00	\$0.00	\$0.00	\$0.00
12246003	CEN	122	DCSMOTORS INC	07-04-2013	1-216758	1	\$2,297.50	\$2,297.50	97.6%	\$0.00	\$0.00	\$0.00	\$0.00
12246003	CEN	122	DCSMOTORS INC	07-14-2013	1-216766	3	\$2,297.50	\$6,892.50	97.6%	\$0.00	\$0.00	\$0.00	\$0.00
12246003	CEN	122	DCSMOTORS INC	07-22-2013	1-216793	2	\$2,297.50	\$4,595.00	97.6%	\$0.00	\$0.00	\$0.00	\$0.00
12246003	CEN	122	DCSMOTORS INC	07-22-2013	1-216793	4	\$2,297.50	\$9,190.00	97.6%	\$0.00	\$0.00	\$0.00	\$0.00
12246003	CEN	122	DCSMOTORS INC	07-22-2013	1-216793	1	\$2,297.50	\$2,297.50	97.6%	\$0.00	\$0.00	\$0.00	\$0.00
12246003	CEN	122	DCSMOTORS INC	07-22-2013	1-216793	3	\$2,297.50	\$6,892.50	97.6%	\$0.00	\$0.00	\$0.00	\$0.00
12246007	CEN	122	DCSMOTORS INC	08-01-2013	1-216855	3	\$35.75	\$107.25	43.3%	\$0.00	\$0.00	\$0.00	\$0.00
12246003	CEN	122	DCSMOTORS INC	08-26-2013	1-216863	1	\$2,297.50	\$2,297.50	97.6%	\$0.00	\$0.00	\$0.00	\$0.00
12246004	CEN	122	DCSMOTORS INC	09-10-2013	1-216968	1	\$73.50	\$73.50	45.6%	\$0.00	\$0.00	\$0.00	\$0.00
12246003	CEN	122	DCSMOTORS INC	09-10-2013	1-216968	2	\$20.00	\$40.00	-175.0%	\$0.00	\$0.00	\$0.00	\$0.00
123460005	CEN		DCSMOTORS INC	09-10-2013	1-216968	1	\$27.50	\$27.50	29.5%	\$50.00	\$50.00	\$5.00	\$55.00
12246003	CEN	122	DCSMOTORS INC	09-12-2013	1-216916	1	\$2,297.50	\$2,297.50	97.6%	\$0.00	\$0.00	\$0.00	\$0.00
12246003	CEN	122	DCSMOTORS INC	10-15-2013	1-217004	1	\$2,297.50	\$2,297.50	97.6%	\$0.00	\$0.00	\$0.00	\$0.00
12246004	CEN	122	DCSMOTORS INC	10-22-2013	1-217014	10	\$73.50	\$735.00	45.6%	\$0.00	\$0.00	\$0.00	\$0.00
12246004	CEN	122	DCSMOTORS INC	10-22-2013	1-217005	2	\$73.50	\$147.00	45.6%	\$0.00	\$0.00	\$0.00	\$0.00
12246004	CEN	122	DCSMOTORS INC	10-22-2013	1-217014	2	\$73.50	\$147.00	45.6%	\$0.00	\$0.00	\$0.00	\$0.00
12246004	CEN	122	DCSMOTORS INC	10-22-2013	1-217011	2	\$73.50	\$147.00	45.6%	\$0.00	\$0.00	\$0.00	\$0.00
Account Total								\$42,779.25		\$50.00	\$5.00		
Vendor Total								\$42,779.25		\$50.00	\$5.00		