



# Clever Rebates

Ditch the manual rebate calculations  
and let the app do the work!



erp365

# Clever Rebates



**Ditch the manual rebate calculations and let the app do the work!**

**Is your rebate process time-consuming & complicated? Want to keep track of what rebates you are owed and what you need to pay, all in one place?**

Clever Rebates allows you to stop manually processing and working out rebates from spreadsheets. Instead it works with Dynamics 365 Business Central to streamline and simplify your incentives, rebates and loyalty scheme management.

## Benefits

- Slash your workload by batch processing your credit memos and automatically calculating payments
- See all your incentives, rebates and loyalty schemes all in one place
- Clear insights and reporting, including different rates for individual customers, items and vendors
- Audit compliant
- Flexible setup and rebate options
- Complete 360° view of your cashflow

## Requirements

Dynamics 365 Business Central or Premium





# Boost your profits & ROI!

By keeping the entire pricing process within Dynamics 365 Business Central you can get easy reports of your pricing and cashflow. As well as, utilising fast batch processing for credit memos, instead of processing individual accruals and document outputs. Eliminate mistakes and missed opportunities by having clear views and insights of potential rebate opportunities and liabilities - all whilst boosting profits and driving ROI!

Get improved credit control and manage your cashflow better by only crediting rebate money to customers when they have paid the invoices which have earned the rebate.

**Rebate Setup**

Default Configuration | Setup Wizard | Actions | Automate | Fewer options

**Sales**

Rebate Nos.: SAL-REB  
 Sales Notification Recipients: first.last@email.com  
 Only Issue Document for Paid Invoices:

**Purchase**

Purchase Rebate Nos.: PUR-REB  
 Purchase Notification Recipients: first.last@email.com

**Posting Setup**

Purchase Rebate Journal Template: GENERAL  
 Purchase Rebate Journal Batch: PUR REBATE  
 Rebate Purchase (Income Statement): 20105  
 Rebate Assets (Balance Sheet): 40105  
 Purchase Rebate Document Output Acc.: 40106

**Automatic Posting**

Rebate Auto Post Output Document:   
 Rebate Auto Post Accrual Journal:   
 Purch. Rebate Auto Post Output Document:   
 Purchase Rebate Auto Post Accrual Journal:

**General Ledger Entries**

Posting Date	Document Type	Document No.	G/L Account No.	Description	Department Code	Customer Group Code	Amount
13/07/2023		SREB0141	50205	SREB0141 : 10000	SALES	SMALL	50.00
13/07/2023		SREB0141	10205	SREB0141 : 10000	SALES	SMALL	-50.00
13/07/2023		SREB0141	50205	Accrual Reversal for Rebate SREB0141 Customer 10000	SALES	SMALL	-50.00
13/07/2023		SREB0141	10205	Accrual Reversal for Rebate SREB0141 Customer 10000	SALES	SMALL	50.00

**Posted Sales Credit Memo**

104102 · Adatum Corporation

Process | Print/Send | Credit Memo | Incoming Document | More options

**General** | 104102 | 13/07/2023 | 13/07/2023

Type	No.	Description	Quantity	Unit of Measure Code	Unit Cost (LCY)	Unit Price Excl. VAT
Comment		Rebate: SREB0141			0.00	
Comment		Sales Rebate 5%			0.00	
Comment		Start Date: 01/01/23			0.00	
Comment		End Date: 31/12/23			0.00	
G/L Account	50206	Amount 1,000 Percentage 5	1		0.00	50.00

Invoice Discount Am... 0.00    Total VAT (GBP) 0.00

Total Excl. VAT (GBP) 50.00    Total Incl. VAT (GBP) 50.00

## Clever Rebates isn't just for managing outgoing rebate accruals

You can use it to keep track of your vendor rebates too. Keep record of what rebates you're owed and easily collaborate with your vendors to make sure that you're all on the same page and you are never out of pocket.

Also, use Clever Rebates to record all of the associated buying group rebates entries and easily send credit memos out to them, as well as to those customers or vendors who have also earned them.

**Sales Rebate SREB0141**

Rebate Entries | Allocations | Actions | Reports | Automate | Fewer options

**General**

No.: SREB0141 | Start Date: 01/01/2023  
 Description: Sales Rebate 5% | End Date: 31/12/2023  
 Value Type: Percentage | Document Output: Sales Credit  
 Type: Fixed | Status: Active

**Sales Rebate Summary**

Total Sales Quantity	1.00
Total Sales Quantity (Base)	1.00
Total Sales Amount	1,000.00
Total Sales Amount Including...	1,200.00
Expected Rebate Total	50.00
Maximum/Fixed Rebate Total	50.00
Accrued Rebate Total	50.00

**Sales Rebate Allocations**

Allocation Type	No.
Customer	10000
Customer	20000

**Lines**

Type	No.	Description
Item	1896-S	ATHENS Desk
Item	1900-S	PARIS Guest Chair, black
Item Category	FURNITURE	Office Furniture



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For more information, email us at [hello@erp365.nz](mailto:hello@erp365.nz) or visit:  
[www.erp365.nz/clever-rebates](http://www.erp365.nz/clever-rebates)