



# Rebates

for Microsoft Dynamics™ AX



Claim Your  
Rebates

Red Maple's Rebates is a powerful solution that removes traditional limitations on standard rebate structures and provides Microsoft Dynamics™ AX customers with a flexible tool to accommodate current and future rebate needs. By applying structured business processes with audit trails and journals, this solution gives companies a solid business foundation for reporting and recognizing rebates.

## Business Situation

Companies that receive rebates as a part of their purchasing, sales or inventory need a method of reporting anticipated rebates, submitting those rebates and recognizing them when they are paid.

## SOLUTION

With Rebates for Microsoft Dynamics™ AX, companies can track and recognize rebates according to your business cycle. The definable calculation tools track, report and apply rebates on realization or accrual. And based on your determination criteria, you can incorporate advanced calculations to recognize rebates on everything from individual customer schedules to volume or purchase thresholds.

Companies that have sophisticated rebate requirements need sophisticated software. Red Maple's Rebates together with the power of Microsoft Dynamics™ AX equals a comprehensive solution to address your rebate requirements.

## Flexible Rebate Structures

With Red Maple's Rebates, flexibility is the core of the system. Customers can determine rebates and payments based on any combination of the all four rebate structure categories:

1. **Basis.** Basis is the foundation for rebates. In Rebates, basis criteria can include revenue, margin, weighted margin, discount percentage, margin percentage, unit price and item quantities. Discounts may also be included.
2. **Selection criteria.** Selection criteria are used to determine when a rebate is to be triggered. Selection criteria can be as simple as selecting which inventory, customers, vendors, territories or sales groups trigger a rebate. Criteria can also be as advanced as creating your own queries to design your own triggers.
3. **Calculations.** Calculations are used to determine how much is paid as defined by the basis and the selection criteria. Rebates can be calculated on a flat amount, a percentage, quantity sold or on a schedule of all three.
4. **Determinations.** Determinations set when and under what circumstances rebates are paid. Rebates can be set upon the transaction event (for instance a purchase order invoice) or over a period of time to reflect the business

situation.

### **Payment Accruals**

Red Maple's Rebates allows for the accrual of payments over time. For instance, if rebates are incurred at the time of the transaction event, but not paid until a later time, it can still be accrued for proper financial reporting. As a result, organizations that rely heavily on rebates can accurately report future assets instead of estimating what may be a smaller or larger asset.

### **Periodic Promotions and Claims**

Rebates often account for yearly promotional payments and periodic claims. For instance, if rebates are earned due to a special circumstance for a quarter, that rebate can be calculated over time, resulting in accurate reporting.

### **Sales Targets and Performance Measures**

Rebates can be used to account for sales targets and performance measures by tying the amounts directly into the purchase and sales projections for the entire organization. As a result when budgetary numbers are changed, sales targets are adjusted for the entire organization.

### **Adjustments and Re-calculations**

Rebates provide functionality to adjust and calculate rebates after a sales order or purchase order has been posted. Through rebate and adjustment journals, changes can be made to the estimates and payments via a structured process. And since all transactions can be modified and tracked in the system with an audit trail, Red Maple's Rebates can replace the traditional reports and spreadsheets that were used to adjust payments at the end of a period.

### **Powerful Inquiries and Reporting**

Rebates include numerous reports and inquiries to help you analyze your company's sales data. You can further drill down into payment data by customizing inquiries through query management.

### **Conclusion**

Large or complex distribution organizations have a powerful solution with amazing flexibility and processing power with Microsoft Dynamics™ AX and Red Maple's Rebates. For more information on Rebates, please contact your Microsoft Dynamics™ AX partner or visit our web site at [www.redmaple.com](http://www.redmaple.com).

## *Quick information*



#### *What Modules are required?*

Microsoft Dynamics™ AX Trade Series



#### *Are you on the Internet?*

More information about our products can be found at [www.redmaple.com](http://www.redmaple.com).



#### *Who do I contact to get a demonstration or purchase?*

Contact your Microsoft Dynamics™ AX partner for pricing, demonstrations or purchasing information.

