

REBATES

User Guide



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AutoPower University Documentation Series.
Printed in the United States of America

Chapter 1 INTRODUCTION & OVERVIEW

Section 1

Section 1.1 Introduction to Rebates

Rebates can be a very important source of income to your company. That is why it is important to be able to quickly and accurately track rebates.

The AutoPower Rebate Software will enable you track your rebates. You will be able to quickly see what customers are rebatable and what vendors you receive rebates from. You can even determine what line codes are rebatable.

Section 1.2 About this Guide

The Rebate Reports is part of the Inventory System. Rebates are an important source of income to your company. Keep a copy of this guide handy for day-to-day processing challenges and order additional copies, as you need them for others throughout your business.

Section 1.3 Overview

The Rebate Reports Menu is designed to help you manage rebates that you are eligible to receive from your manufacturers. **These reports should be run on a monthly basis.** Below is a brief description of each option on the Rebate Reports Menu.

CUSTOMER MAINTENANCE

The Customer Maintenance section is where you will set up customers whose purchases make you eligible for rebates from specific manufacturers. You will specify the customer number, the vendor, and the registration number. If the manufacturer does not require the customer to be registered, the customer does not need to be entered.

MANUFACTURER MAINTENANCE

Just as you need to set up specific customers for rebates, you must also set up the manufacturers who offer you rebates. You will specify what location/s are eligible for the rebate, the line, if the customer must be registered, types of customer, the maximum selling price and the percentage of rebate.

MANUFACTURER'S REBATE REPORT

The Manufacturer's Rebate Report will calculate the rebates that you are eligible to receive from your manufacturers. This report will reflect rebates due to you from the previous month.

VENDOR/CUSTOMER REBATE REPORT

The Vendor/Customer Rebate Report gives you the option to run 4 different reports.

- List all Vendor Rebates
- List all Customer Rebates
- List all Customers Rebated by Vendor
- List all Vendors Rebated by Customer

Each of these reports will be discussed in greater detail in the following sections.

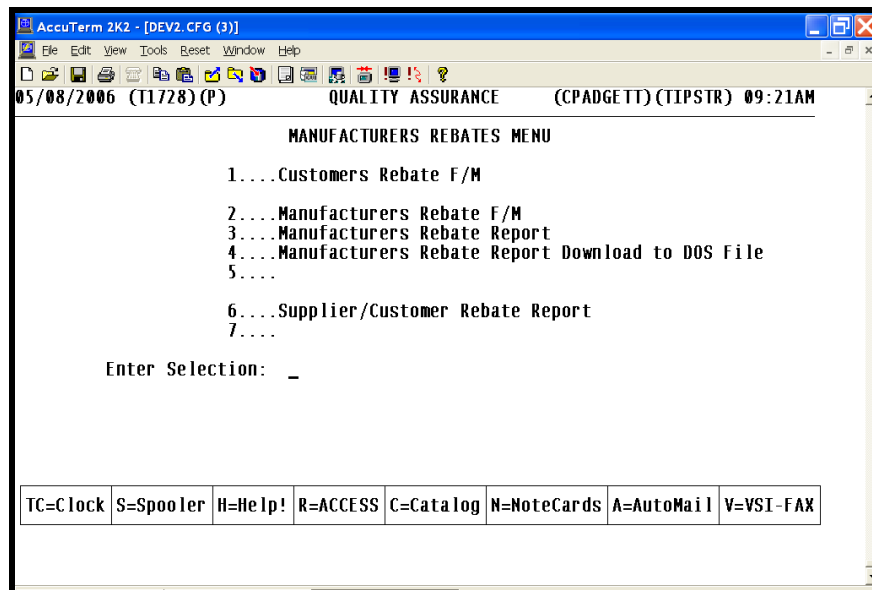
Chapter 2 REBATE MAINTENANCE

Section 2

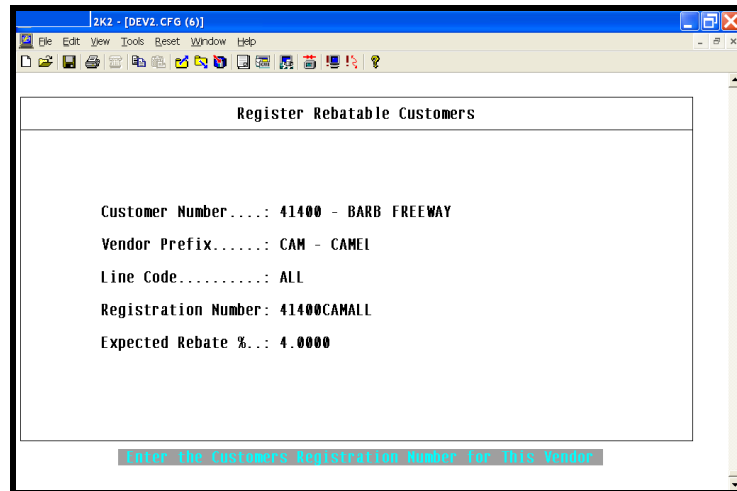
Section 2.1 Customer Rebate Maintenance

Manufacturers may require your customers to be registered with them in order to issue rebates on specific product lines. The *Customer Rebate Maintenance Screen* is where you will register your customers with specific manufacturers. You may register your customers more than once. For example, they may be registered for vendor EUC, line 100. But they may also be registered for all lines of vendor MON.

To access the *Customer Rebate Maintenance Screen*, from the **Inventory Menu**, select the option entitled **Rebate Reports Menu**. This will display five menu options.



To register a rebatable customer, select the option entitled **Customer Rebate Maintenance**. This will display the following screen.



2K2 - [DEV2.CFG (6)]

File Edit View Tools Reset Window Help

Register Rebatable Customers

Customer Number.....: 41400 - BARB FREEWAY

Vendor Prefix.....: CAM - CAMEL

Line Code.....: ALL

Registration Number: 41400CAMALL

Expected Rebate %...: 4.0000

ENTER THE CUSTOMER'S REGISTRATION NUMBER FOR THIS VENDOR

CUSTOMER NUMBER

Enter the customer number that needs to be registered. The customer's name will display to the right of the customer number. This customer must already exist in the Customer Master File. If you enter a customer number that is not in the Customer Master File, the cursor will not advance to the next field. It will remain on this field until a valid customer number is entered.

VENDOR PREFIX

Enter the 3-character vendor code that will be rebatable for this customer. If the vendor does not exist, the cursor will not advance to the next field. The vendor name will display to the right of the vendor code.

LINE CODE

Enter the line code that will be rebatable when this customer purchases a product from this vendor. If the whole product line is rebatable, enter ALL. The line code must exist for this vendor. If the vendor does not carry the line entered, the cursor will remain at the *Line Code* field until a valid line code is entered.

➔ **NOTE:** There must be a save-list for the Vendor/Line.

REGISTRATION NUMBER

Enter the registration number for this customer. This is a user-defined field. The registration number may be alphanumeric.

Once all of the data entry has been completed, the following prompt will display at the bottom of the screen.

Accept? (Y, N, D, E):

- Y** Enter Y for yes if all of the entries are correct. This selection will exit the screen and save all data entered.
- N** Enter N for no if you need to modify any of the entries on this screen. If you enter N, the cursor will return to the Customer Number field.
- D** Enter **DELETE** to delete this registration.
- E** Enter **E** to exit. This selection will exit the screen without saving the data entered.

To return to the Rebate Reports Menu, press **ENTER**.

Section 2.2 Manufacturer Rebate Maintenance

You must enter all manufacturers you are eligible to receive rebates from through Manufacturer Rebate Maintenance. This screen will enable you to print reports with a listing of what rebates you are eligible for and how much.

To access the *Manufacturer Rebate Maintenance Screen*, start from the Inventory Menu. Select the **Rebate Reports Menu**. This will display the following menu options.

```

AccuTerm 2K2 - [DEV2.CFG (3)]
File Edit View Tools Reset Window Help
05/08/2006 (T1728) (P)          QUALITY ASSURANCE (CPADGETT) (TIPSTR) 09:21AM

MANUFACTURERS REBATES MENU

1...Customers Rebate F/M
2...Manufacturers Rebate F/M
3...Manufacturers Rebate Report
4...Manufacturers Rebate Report Download to DOS File
5...
6...Supplier/Customer Rebate Report
7...

Enter Selection: _

TC=Clock S=Spooler H=Help! R=ACCESS C=Catalog N=NoteCards A=AutoMail V=VSI-FAX
    
```

Select **Manufacturer Rebate Maintenance** to display the following screen.

```

AccuTerm 2K2 - [DEV2.CFG (6)]
File Edit View Tools Reset Window Help

Manufacturers Rebate File Maintenance

Location or ALL.....: W1 - APC CORP
Vendor Prefix.....: CAM - CAMEL
Line Code or ALL.....: ALL - ALL LINE CODES
Registered Customers or ALL: Y - REGISTERED CUSTOMERS
Type of Business or ALL....: ALL - ALL TYPES OF BUSINESS
Maximum Selling Price.....: L
Percentage Rebate.....: 10% of J

Accept? (Y,N,D,E) :_
    
```

LOCATION OR ALL

Enter the location that is eligible for rebates. If you are eligible for all locations, enter *ALL*.

VENDOR PREFIX

Enter the 3-character vendor code that will be rebatable for this customer. If the vendor does not exist, the cursor will not advance to the next field. The vendor name will display to the right of the vendor code.

LINE CODE OR ALL

Enter the line code that will be rebatable when this customer purchases a product from this vendor. If the whole product line is rebatable, enter **ALL**. The line code must exist for this vendor. If the vendor does not carry the line entered, the cursor will remain at the *Line Code* field until a valid line code is entered. NOTE: There must be a save-list for the Vendor/Line.

REGISTERED CUSTOMER OR ALL

A response of **Y** for yes will reflect only registered customers on reports. To report on all customers, enter **ALL**.

TYPE OF BUSINESS OR ALL

Enter the type of business that is eligible for rebates. The entries for this field are user-defined. They should match the codes used for the *Type of Business* field in the Customer Master Record.

MAXIMUM SELLING PRICE

Enter the Maximum Selling Price that can be charged to a registered customer so that you can receive a rebate from this manufacturer. For example, if you enter "**C+20.00**", any product you sold in this Vendor Line for less than Cost plus 20% will be eligible for rebate. If the part is sold for more than the calculated figure in this field, it will not be eligible for a rebate.

PERCENTAGE REBATE

Enter the percentage rebate you will receive. Also indicate which price field the rebate is to be calculated from. For example, if you are to receive a rebate equal to 10% of the List Price, enter "**L10**".

Once all data entry has been completed, the following prompt will display at the bottom of the screen.

Accept? (Y, N, D, E):

- Y** Enter Y for Yes. This will exit and save all data entered on this screen.
- N** Enter N for No. This selection will return the cursor to the *Location* field so you can make changes before you save the data.
- D** Enter **DELETE** to delete the entire record. This will remove this selection from the manufacturer reports menu to be discussed in the next section.
- E** Enter **E** to exit. This selection will exit the *Manufacturer Rebate Maintenance Screen* without saving any data entered or changed.

To return to Rebate Reports Menu, press **ENTER**.

Chapter 3 REBATE REPORTS

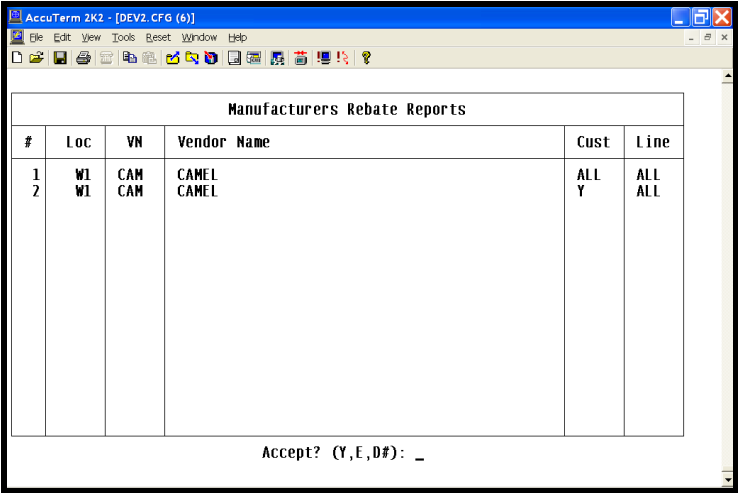
Section 3

Section 3.1 Manufacturer Rebate Reports

The Manufacturer Rebate Reports screen will list all manufacturers you are eligible for rebate with as set up through Manufacturer Rebate Maintenance.

To access the *Manufacturer Rebate Reports Screen*, from the **Inventory Menu**, select **Rebate Reports Menu**. This will display the options available for rebates.

Select **Manufacturer Rebate Reports** to access your manufacturer reports. This will display the screen below.



#	Loc	VN	Vendor Name	Cust	Line
1	W1	CAM	CAMEL	ALL	ALL
2	W1	CAM	CAMEL	Y	ALL

Accept? (Y,E,D#): _

This will be a list of manufacturers that you have set up for rebates.

If you have not set up any manufacturers for rebates, the screen will not display. You will return to the Rebate Reports Menu.

This screen will display the following information:

#

This is the item number of the report on the list.

LOC

This is the location number where this manufacturer was set up for rebates. This information is pulled from the Manufacturer Rebate Maintenance Record you created in the previous option.

VN

This the 3-character vendor code of the vendor you have set up for rebates.

CUST

There will be two entries that will display in this column.

	Registered Customers Only
ALL	All customers

The information in this field will reflect how you set up the manufacturer through Manufacturer Rebate Maintenance.

LINE

This column will reflect the line that is eligible for rebate for this manufacturer. This data was entered on the Manufacturer Rebate Maintenance Screen.

If any of the above columns reflect incorrect information, select Manufacturer Rebate Maintenance to make your corrections for this manufacturer.

The following prompt will display on the bottom of the screen:

Accept? (Y, E, D#):

- Y** If you enter Y for yes, this will print all of the reports listed on this screen.
- E** If you enter **E** to exit, you will exit the screen without printing any reports. To print one of the reports, enter the item number.
- D** Select **D** followed by the item number to delete one report from the listing. This may be helpful if you want to print all reports except one. You can delete the one report you do not want to print, then run all of the others at the same time by entering .

These reports will reflect data that has been entered for the previous month.

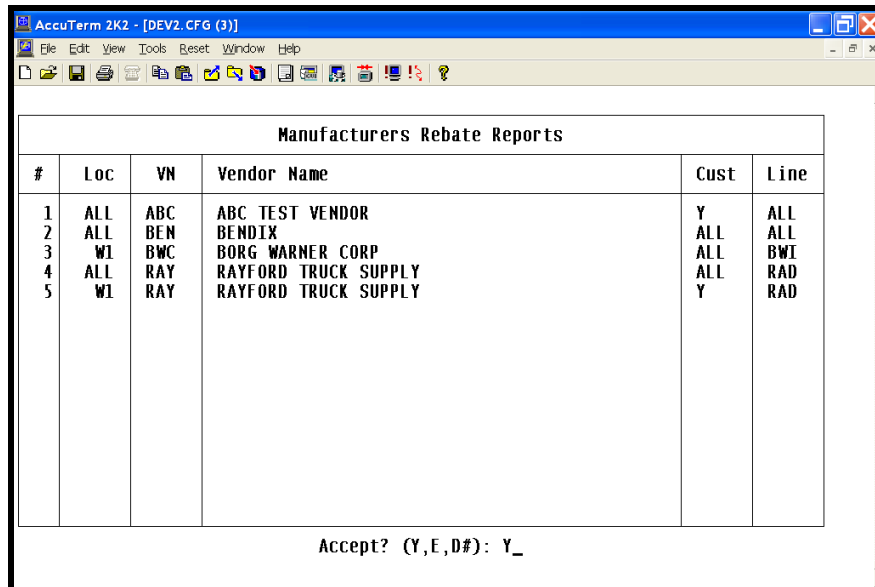
➔The End of Month process updates these files.

To return to the Rebate Reports Menu, press **ENTER**.

Section 3.2 Manufacturers Rebate Report Download to PC

To access the *Manufacturer Rebate Report Download to PC*, from the **Inventory Menu**, select **Rebate Reports Menu**. This will display the options available for rebates.

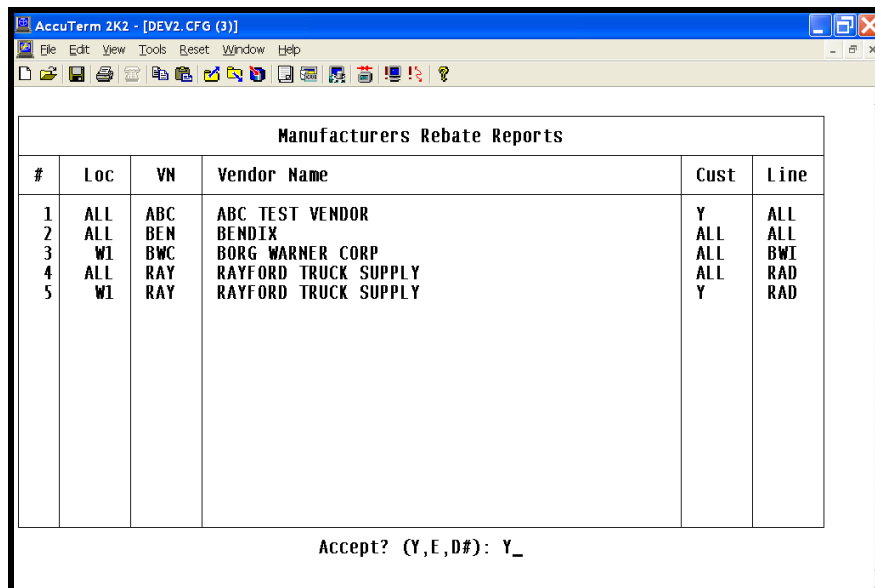
Select **Manufacturer Rebate Report Download to PC** to access your manufacturer reports. This will display the screen below



Manufacturers Rebate Reports					
#	Loc	VN	Vendor Name	Cust	Line
1	ALL	ABC	ABC TEST VENDOR	Y	ALL
2	ALL	BEN	BENDIX	ALL	ALL
3	W1	BWC	BORG WARNER CORP	ALL	BWI
4	ALL	RAY	RAYFORD TRUCK SUPPLY	ALL	RAD
5	W1	RAY	RAYFORD TRUCK SUPPLY	Y	RAD

Accept? (Y,E,D#): Y_

After entering the manufactures reports that you would like to download, answer "Y" to Accept? The following prompt will display.



Manufacturers Rebate Reports					
#	Loc	VN	Vendor Name	Cust	Line
1	ALL	ABC	ABC TEST VENDOR	Y	ALL
2	ALL	BEN	BENDIX	ALL	ALL
3	W1	BWC	BORG WARNER CORP	ALL	BWI
4	ALL	RAY	RAYFORD TRUCK SUPPLY	ALL	RAD
5	W1	RAY	RAYFORD TRUCK SUPPLY	Y	RAD

Accept? (Y,E,D#): Y_

Do you wish to download the Rebate Reports? (Y, N): Type in "Y" to start the download.

```

AccuTerm 2K2 - [DEV2.CFG (3)]
File Edit View Tools Reset Window Help
REBATE REPORT DOWNLOAD IN PROGRESS...

To download 4 reports.

1. rebrpt01-31-06_abcall_all.txt
1 record(s) selected to SELECT list #0.
0 Detail rows produced.
rebrpt01-31-06_abcall_all.txt downloaded to D:\download folder.

2. rebrpt01-31-06_abcall_all.txt
1 record(s) selected to SELECT list #0.
0 Detail rows produced.
rebrpt01-31-06_abcall_all.txt downloaded to D:\download folder.

3. rebrpt01-31-06_benall_all.txt
0 record(s) selected to SELECT list #0.

4. rebrpt01-31-06_rayrad_all.txt
0 record(s) selected to SELECT list #0.

REBATE DOWNLOADS COMPLETE - Press any key...
  
```

These reports will be retained in a folder called Download on the "D" drive of the main server. Using the D: drive and the download folder on the mainserver will not limit the functionality of this program to be for only users with PC's on their desks.

Example of Rebate Report for the Month Ending (previous) is shown below.

M1 - AUTOPOWER CORPORATION									
Rebate Report for the Month Ending									
For Vendor CAMEL PRODUCTS									
Cust No	Invoice#	Customer Name	Date	Qty Sold	Part Num	Sell Ea	Jobber Ea	Ext Sell	Ext Jobbe
41400	246	BARB FREEMAY	05/08/06	1	12-092	8.00	10.57	8.00	10.57
41400	247	BARB FREEMAY	05/08/06	1	12-092	100.00	10.57	100.00	10.57
								108.00	21.14
								108.00	21.14
The rebate is calculated as 10% of the Jobber Price.									
The total calculated rebate due = 2.11									

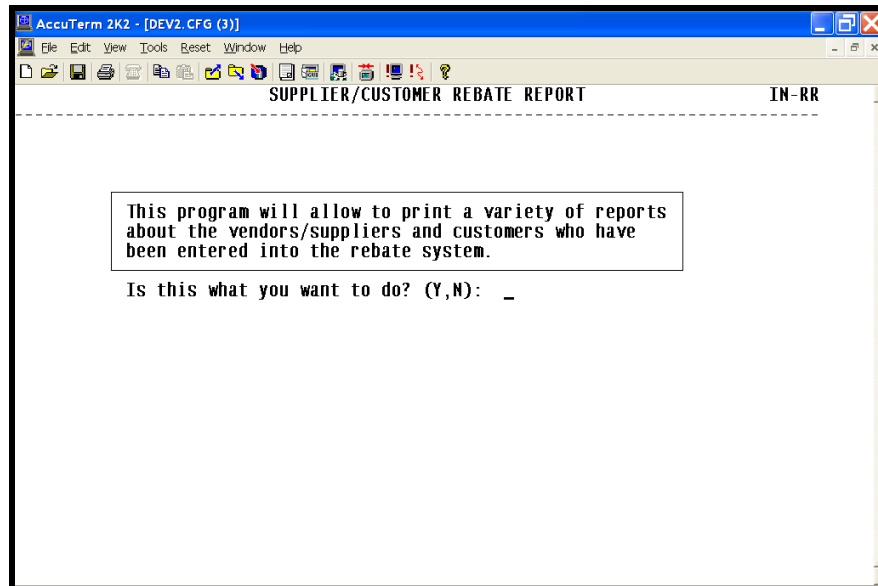
Section 3.3 Supplier/Customer Rebate Reports

The Customer/Vendor Rebate Reports will allow you to print a variety of reports about vendors and customers who have been entered into the rebate system.

To access the *Supplier/Customer Rebate Report Screen*, select the **Rebate Reports Menu** option from the **Inventory Menu**. Then from the **Rebates Menu**, select **Supplier/Customer Rebate Reports**. The following screen will display with the cursor at the following prompt.

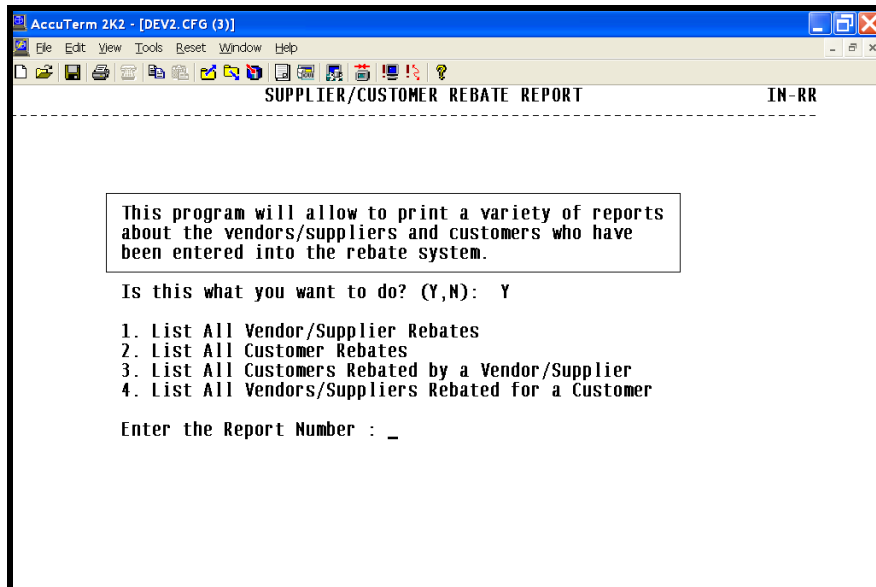
"Is this what you want to do? (Y,N)"

Enter N for No to return to the Rebate Reports Menu.



Enter Y for Yes to display the list of reports that are available.

The screen that lists these reports is illustrated below.



To run one of the reports, enter the appropriate report number.

Section 3.2.1 List all Vendor Rebates

The first report is the **List all Vendor Rebates report**. This report will simply provide a listing of manufacturer's with whom you are eligible to receive rebates and their terms.

Once you make the selection, **List all Vendor Rebates**, the report is immediately queued to the printer.

The headings of the report reflect the fields where you entered the data from the *Manufacturer's Rebate Maintenance Screen*.

Vendor Prefix: This column will print the three-character vendor code.

Vendor Name: This column will reflect the name of the vendor.

Line Code: The line code eligible for rebates will printer here or the word *ALL* if all line codes are eligible for rebate.

Need To Be Registered?: A or will display in this column. If the customer must be registered to be eligible for a rebate, a for yes will display. If the manufacturer does not require the customer to be registered, answer for no.

Type Of Business: The type of business you entered on the Manufacturer's Screen will print in this column.

Price Level: This column will indicate which price field the maximum selling price is calculated from.

% Off Price Level: This column provides the second part to the equation. What percent is taken off of the price level indicated in the previous column.

Rebate Percent: This column will reflect the percentage rebate for products in this category. (i.e.: J10 means 10% off of jobber)

000017

08 May 2006		VENDORS REBATE REPORT			PAGE 1		

				TYPE	Z OFF		
VENDOR		LINE	NEED TO BE	OF	PRICE	PRICE	REBATE
PREFIX	VENDOR NAME	CODE	REGISTERED?	BUSINESS LEVEL	LEVEL	PERCENT	

CAM	CAMEL PRODUCTS	ALL	ALL	ALL	L		J10

1 records listed.							

Section 3.2.2 List all Customer Rebates

The **Customer Rebate Report** will print a list of all customers you have registered and with what vendors and lines they are registered. The information on this report is pulled from the Customer Rebate Maintenance Screen.

To run this report, from the **Customer/Vendor Report Screen**, select the second report entitled, **List all Customer Rebates**. The following prompt will display.

"Enter Location or ALL"

SUPPLIER/CUSTOMER REBATE REPORT	IN-RR
<div style="border: 1px solid black; padding: 5px; margin: 10px 0;"><p>This program will allow to print a variety of reports about the vendors/suppliers and customers who have been entered into the rebate system.</p></div> <p>Is this what you want to do? (Y,N): Y</p> <ol style="list-style-type: none">1. List All Vendor/Supplier Rebates2. List All Customer Rebates3. List All Customers Rebated by a Vendor/Supplier4. List All Vendors/Suppliers Rebated for a Customer <p>Enter the Report Number : 2</p> <p>Enter Location or ALL: ALL</p> <p>Spooler Entry #1417</p>	

If you enter a location at this prompt, the report will reflect only those registered customers from a specific location. If you type 'ALL', the report will print all registered customers from all locations.

The column headings of the report reflect the fields where you entered the data from the *Customer Rebate Maintenance Screen*.

Customer Number: This will print the customer number.

Customer Name: The customer name as entered in the Customer Master Record will print.

Vendor Prefix: The vendor code for which this customer is eligible for rebates will print in this column.

Line Code: The line codes from which this customer must purchase to be eligible for rebates.

Registration Number: This is the user-defined registration number as entered on the Customer Rebate Maintenance Screen.

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CUSTOMERS REBATE REPORT

PAGE 1

CUSTOMER NUMBER	CUSTOMER NAME	VENDOR PREFIX	VENDOR NAME	LINE CODE	REGISTRATION NUMBER
41400	BARE FREEMAN	CAM	CAMEL PRODUCTS	ALL	41400CAMALL

1 records listed.

Section 3.2.3 List all Customers Rebated by a Vendor

This report, **List all Customers Rebated by a Vendor** will allow you to print a rebate report for one vendor. The report will print the rebatable customers for a specific vendor.

To run this report, select the third option entitled **List All Customers Rebated by a Vendor**. The following will display.

"Enter the Vendor Number"

Enter the vendor you want to run this report for. Once you have entered the vendor code, another prompt will display.

"Enter Location or ALL"

Enter the location you want to be reflected in this report. If you want to run it for all locations, enter 'ALL'.

The report will print the following information.

Customer Number: This is the customer's account number. This data is pulled from the Customer Maintenance File.

Customer Name: This will print the full name of the customer.

Vendor Prefix: This column will reflect the vendor code.

Vendor Name: This is the vendor's full name.

Line Code: If this customer is only rebatable for a specific line, the line code will print in this column. If they are rebatable for all lines, 'ALL' will print in this column.

Registration Number: If the customer has a registration number, the registration number will print in this column.

AccuTerm 2K2 - [DEV2.CFG (6)]

88 May 2986 CUSTOMERS REBATE REPORT FOR CAM PAGE 1

CUSTOMER NUMBER	CUSTOMER NAME	VENDOR PREFIX	VENDOR NAME	LINE CODE	REGISTRATION NUMBER
41498	BARB FREEMAN	CAM CAMEL	PRODUCTS	ALL	41498CAMALL

1 records listed.

Section 3.2.4 List all Vendors Rebated by a Customer

The report, **List all Vendors Rebated by a Customer**, will allow you to print a rebate report for one customer. The report will print the vendors that this customer is eligible for rebates from.

To run this report, select the fourth option entitled **List All Vendors Rebated by a Customer**. The following prompt will display.

"Customer Number"

Enter the customer number for whom you want to print this report. Once you have entered the customer number, the report will be queued to the printer.

The following information will print on the report.

Vendor Prefix: This will indicate the vendor code for which this customer is rebatable.

Vendor Name: This column will print the full name of the vendor.

Line Code: If this customer is rebatable for only a specific line for this vendor, that line code will print in this column. If the customer is rebatable for all lines, 'ALL' will print in this column.

Registration Number: This column will print the customer's registration number with this vendor.

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File Edit View Tools Reset Window Help

88 May 2006 VENDORS REBATE REPORT FOR 41488 PAGE 1

VENDOR	LINE	REGISTRATION
PREFIX	VENDOR NAME	CODE
CAM	CAMEL PRODUCTS	ALL
		41488CAMALL

1 records listed.