



FACT SHEET



Clever Rebates

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

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:

Posting Setup

Rebate Journal Template: GENERAL
 Rebate Journal Batch: SAL REBATE
 Rebate Sales (Income Statement): 10205
 Rebate Liabilities (Balance Sheet): 50205
 Sales Rebate Document Output Acc.: 50206

Automatic Posting

Rebate Auto Post Output Document:
 Rebate Auto Post Accrual Journal:

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

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

General Ledger Entries | Search | Edit List | Process | Entry | Review Entries | Actions | Related | Automate | Fewer options

| 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

| Lines | Manage | Line | Fewer options | | | |
|-------------|--------|---------------------------|---------------|----------------------|-----------------|----------------------|
| 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

Your Clever Rebates License will expire in 15 days. View license details

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
 Value Calculation: Maximum/Fixed Rebate Maximum/Fixed Rebate: \$
 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 1 | No. 1 |
|-------------------|-------|
| Customer | 10000 |
| Customer | 20000 |

Lines | Manage

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





FACT SHEET



Clever Rebates

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

For more information, email us at hello@cleverdynamics.co.uk
or visit: cleverdynamics.co.uk/clever-rebates