

CASE STUDY

Product Development: Vendor Rebate Solution for Acumatica



The Vendor Rebate Solution was developed by Asgard Alliance Software for a client of an Acumatica VAR. You can learn more about it in this case study here.

RESULTS

Speed Gain: 8X
Rebate Contracts: 129
Rebates per Customer: 664
Rebates per Rebate Class: 202
Rebates per Warehouse: 10
Rebate Detail Sequences: 2480
Rebates per Vendor: 213
Rebate trans. per month: 40,000+

BUSINESS NEEDS

Challenges

Handle Vendor Rebates
Multiple breakpoints, % or \$
Handle by Period
Generate AP D/C Adjustment
Reports by Period/Vendor/Item
Rebate by Rebate/Item Class, Vendor,
Customer, Item, Whse

It used to take multiple days to pull the correct sales data, and complete the necessary reports in the various formats required by our Vendors. When credits were received, they had to be entered manually. Now, with the Vendor Rebate module, it only requires a few hours to apply rebates and process all the reports. Accounting transactions are now linked to these applications for tracking and accuracy.

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APPROACH

DEFINE REBATE STRUCTURE

We created a rebate matrix similar to the discount structure that users are familiar with. We added support for discount amount, percentage or based on cost of product sold. We added support of different rates per UoM. We added support for Effective/Expiry dates.

CREATE REBATE ENGINE

We then created a rebate engine such that given the data found on a sales order line, we could gather a rebate code, a rebate sequence tied to a rebate contract and manufacturer information and a calculated rebate amount. This engine had to be optimized for speed by using a specialized caching mechanism.

CREATE REBATE EXTRACTOR/CALC. PROCESS

A process screen was created to extract sales data (partial or complete) to be processed and execute the rebate engine against it. We also added support for rebates on assembly kit components on any level of the components (to handle kits within kits). We also display counts and statistics of item founds, rebates applied or not, and possible missing configurations. We added navigation between periods (first, previous, next, last).

CREATE AP DEBIT ADJUSTMENT DOCUMENT

We then added a function to create an AP Debit or AP Credit adjustment document, one per vendor/period with one document line per item with item quantity, average price and rebate amount. Partial adjustment could also be done to account for rebate dispute (with later acceptance or refusal).