

# 365VendorRebates



FULLY CAPTURE MANUFACTURER REBATES TO  
MAXIMIZE PROFIT MARGINS

In today's competitive market, manufacturer product incentives often are the difference between making and losing money for wholesalers and distributors. While vendor rebates drive sales for both manufacturer and distributor, the administrative burden of tracking and managing claims falls entirely to the seller.

For wholesalers and distributors currently using Dynamics 365, vendor incentive claims must be managed outside the system, resulting in unclaimed rebates, errors in claims and delays in filing the claims with the manufacturer.

## AUTOMATE THE REBATE CLAIMS PROCESS DIRECTLY THROUGH DYNAMICS 365 FOR FINANCE AND OPERATIONS

With **365VendorRebates** from Western Computer, wholesalers and distributors can automate the process to capture every vendor rebate claim and maximize profit margins.

Working directly through Dynamics 365 for Finance and Operations, **365VendorRebates** will:

- Link manufacturer trade agreements to specific products in inventory
- Recognize when the product is sold
- Create appropriate journal records reflecting the transaction
- Calculate both the sales and actual margins before and after rebate
- Automatically file the rebate claim with the manufacturer and track claim details

**365VendorRebates** eliminates the cumbersome, manual spreadsheets wholesalers currently depend on to track rebates. With the vendor claims process triggered by customer purchases of qualifying products, claims are paid faster, accelerating cash flow.



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## THE BURDEN OF VENDOR REBATE ADMINISTRATION

Manufacturers rely on rebates as a promotional strategy, providing strong joint marketing opportunities for manufacturers and their distribution channels. Wholesalers use discounts and customer rebates as compelling, often time-sensitive, incentives for their customers and then recover lost margin through the rebate from the manufacturer. The vendor rebate may even represent all or most of the wholesaler's profit margin.

The challenge for wholesalers and distributors is the administration of the rebate process. Since Dynamics 365 does not manage vendor rebates natively, distributors must manage the process outside of the system through spreadsheets. Manual tracking often results in unclaimed rebates, errors in claims and delays in filing the claims—impacting cashflow and profits.

**Customized options for Retail Promotions and Special Pricing**

**A VIEW INSIDE 365VENDORREBATES**

**Vendor support option from sales trade allowance agreements**

**Event attached to special pricing trade agreement**

**VendorRebate claim support details**

**Displaying Event ID's in sales order**

**Event attached to retail promotions**



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## FULLY CAPTURE REBATE CLAIMS AND ACCELERATE CASHFLOW


**365VendorRebates** eliminates the cumbersome spreadsheets, working directly through Dynamics 365 for Finance and Operations.

**365VendorRebates** automates the rebates tracking and claims filing and provides visibility into the process to:

- Ensure transactions are captured in real time and correctly recorded as journal entries
- Accelerate transmission of rebate claims to the manufacturer
- Calculate both sales margin and actual margin
- Deliver timely, accurate margin information, including discounts and rebates, to management

**Managing rebates directly within Dynamics 365 for Finance and Operations with 365VendorRebates ensures transactions eligible for rebates are captured and accelerates the claims process. Automating the process improves the efficiency of the accounting team and provides unified insight for managers.**

## COMPARING D365 STANDARD REBATES WITH 365VENDORREBATES

STANDARD DYNAMICS 365 FOR FINANCE AND OPERATIONS	365VENDORREBATES ENHANCEMENTS 
<ul style="list-style-type: none"> <li>• Focuses on end customer-driven rebate claims</li> </ul>	<ul style="list-style-type: none"> <li>• Includes standard rebates functions, extends to wholesale</li> </ul>
<ul style="list-style-type: none"> <li>• Driven by purchase activity</li> </ul>	<ul style="list-style-type: none"> <li>• Driven by sales activity</li> </ul>
<ul style="list-style-type: none"> <li>• Focused on Supplier-Customer Agreements</li> </ul>	<ul style="list-style-type: none"> <li>• Incorporates Wholesale Trade Agreements</li> </ul>
<ul style="list-style-type: none"> <li>• Covers Standard Retail Promotions</li> </ul>	<ul style="list-style-type: none"> <li>• Enables Vendor-funded promotions</li> </ul>
<ul style="list-style-type: none"> <li>• Provides review and approve process for claims</li> </ul>	<ul style="list-style-type: none"> <li>• Provides automatic claims filing</li> </ul>

## PRACTICAL SOLUTIONS FROM THE EXPERTS IN WHOLESALE DISTRIBUTION

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In business for more than 30 years, Western Computer has a deep understanding of wholesalers and distributors and the unique challenges they face. Working with scores of Microsoft Dynamics customers, Western Computer has leveraged its industry expertise to develop standard commercial products that solve common problems. These distribution applications are verified by Microsoft and are available through Microsoft AppSource.



Contact us to find out more about **365VendorRebates**, as well as the rest of the Western Computer Wholesale Distributor Dynamics 365 Solution Series