

## MDS Quick Guide – Remotenet Rebate Tracker

V1.1 Updated 10/14/20 DJF – Added Option to Skip creating credits and just create csv report

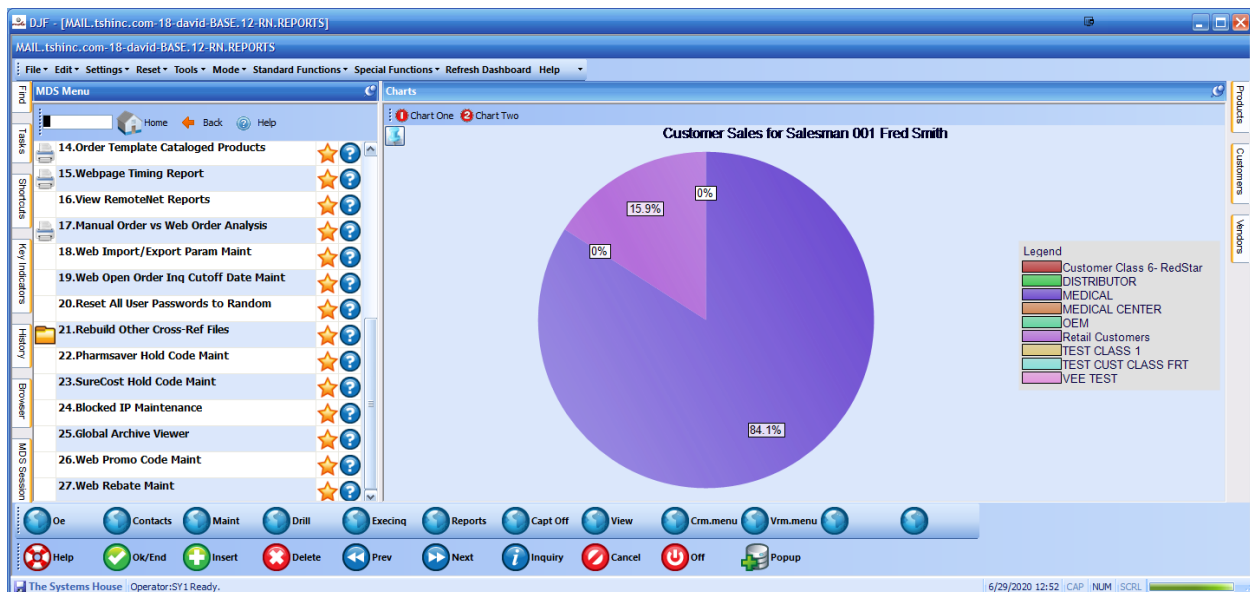
V1.2 Updated 10/23/20 DJF - Added Customer Eligibility Option

The Remotenet Rebate tracker is designed to give customers a visual goal to generate a rebate/credit back to them after a certain period (monthly or annually) based on total overall sales. Customer Sales Net of any Returns are used to calculate the customer sales dollars and options exist for a sliding scale to allow them to have tiers for different rebate percentages. If you want to have one overall goal you simply enter a single goal and leave the percentage back blank. The rebate amount and calculation are based on a sliding scale and a percentage in the Web Rebate Maint Menu Item / Remotenet Rebate Tracker program.

At the end of any period – you can create a credit memo (optionally) to allow the customer to use the credit due to them at that period. And if so desired and customer can be excluded by using the web rebate eligibility maintenance.

To Setup:

Navigate to the Remotenet Menus and choose the Web Rebate Maint menu option



Then Setup the Dollar Spend, Descriptions and Percentage back for each level. And Decide if you want to have the goal be based on Annual Spend or Monthly Spend. Both come from the Customer Detail file and are calculated/cleared in the End of Month Procedure.

Once a customer hits the spending level it will automatically move them to the next tier. In our example Silver, Gold, Platinum and Diamond.

In our example depending on how much they spend they will see the target and goals.

By default, the Rebate Tracker will break the goal in the 4 parts to make it simple to see on a thermometer display. However, the display is customizable as well.

The following fields are available for display in the rebate tracker.

'[CURR.SPEND]' – Current Spend – (Customer Detail Sales less returns annual vs monthly from flag)

'[CURR.REBATE]' – Current Rebate Calculated – (current spend \* percentage / 100)

'[AMT.LEFT]' - Goal amount – current spend

'[GOAL]' - Goal from Rebate Parameters – set above – once spend is over goal is will move to next tier

'[LVL1]' - Goal / 4 \* 1 – (first milestone or 25% of goal)

'[LVL2]'- Goal / 4 \* 2 – (milestone or 50% of goal)

'[LVL3]'- Goal / 4 \* 3 – (milestone or 75% of goal)

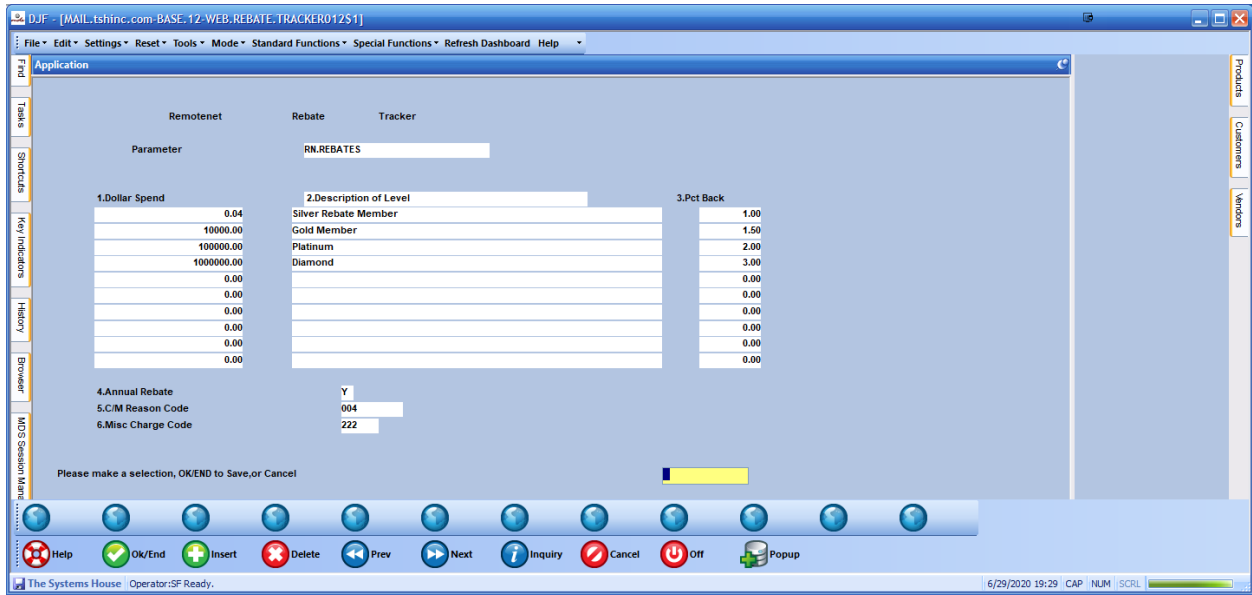
'[LVL4]'- Goal / 4 \* 4 – (milestone or 100% of goal)

'[PCT]' – Percentage to calculate on rebate

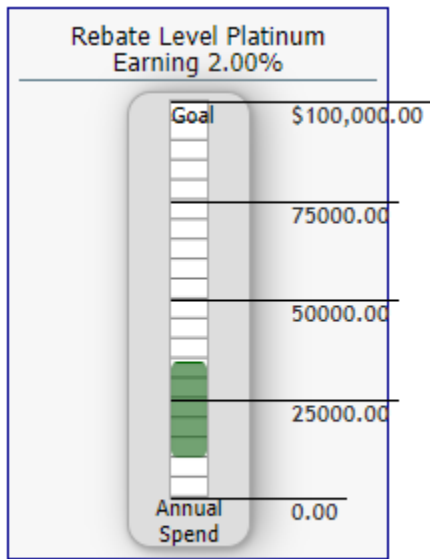
'[PCT.COMPLETE]' – what percentage you are towards your goal (if not using milestones)

'[SPEND.MSG]' – Spend message "Annual Spend" VS "Monthly Spend"

'[REBATE.DESC]' – Rebate Description from Parameter / maintenance above



Standard Option



Alternate Option

## REBATE TRACKER

<b>Goal:</b>	<b>\$5000.00</b>
<b>Current Spend MTD:</b>	<b>\$3897.50</b>
<b>Left to Earn Rebate:</b>	<b>\$1102.50</b>
<b>Time Remaining:</b>	<b>1 Days</b>

The screenshot shows a web browser window with the following elements:

- Browser Address Bar:** rs6000d.tshinc.com:7373/MDSWEB/login012B/login012B
- Page Header:** The Systems House, Inc. Software Solutions for Importers and Distributors. Welcome JR | Order: A31635 \$0.00 | Checkout | 1-Click Checkout | View Order | Log out - Any issues?
- Product List:**

Item Name	ID	Date	Price	Action
OFFICE FURNITURE SET	01501710-001	05/18/2001	\$24,652.00	Reorder
OFFICE SUPPLIES	01501710	05/18/2001	\$24,652.00	Reorder
PLASTIC DESK DRAWERS	01501698	05/11/2001	\$510.00	Reorder
PLASTIC DESK LEGS	01501700	05/11/2001	\$510.00	Reorder
PLASTIC DESK SIDES	01501703	05/11/2001	\$510.00	Reorder
PLASTIC DESK TOPS	01501703	05/11/2001	\$510.00	Reorder
PLASTIC DESKS	01501703	05/11/2001	\$0.00	Reorder
PRESCRIPTION DRUGS	01501701-001	05/11/2001	\$47.50	Reorder
RACHEL'S TYPE	01501701	05/11/2001	\$47.50	Reorder
RN MEDICAL SUPPLIES	01501702-002	05/11/2001	\$180.00	Reorder
ROOM DEODORIZERS	01501702	05/11/2001	\$190.00	Reorder
SERIAL CODED ITEMS	01501613	04/22/2001	\$1,810.00	Reorder
SKI BOOTS	01501502	04/01/2001	\$20.80	Reorder
SURGICAL INSTRUMENTS	01501503	04/01/2001	\$18.10	Reorder
SUTURES	01501517	04/01/2001	\$11.80	Reorder
SWEATERS	01501464	03/30/2022	\$0.00	Reorder
TEST 60	01501465	03/30/2001	\$10.00	Reorder
TEST 750	01501480	03/30/2001	\$12.00	Reorder
TEST 777	01501448-001	03/26/2001	\$14.75	Reorder
TEST1	01501448-002	03/26/2001	\$4,750.00	Reorder
TEST3	01501448	03/26/2001	\$4,764.75	Reorder
TUBING AND VALVES	01501450-001	03/26/2001	\$2,385.00	Reorder
WORKSTATIONS	01501450	03/26/2001	\$2,385.00	Reorder
Best Selling	01501405	03/25/2001	\$0.00	Reorder
- Rebate Progress Chart:**

Rebate Level Platinum Earning 2.00%

Goal: \$100,000.00

Annual Spend: 0.00

The chart shows a vertical bar representing the current spend, which is significantly below the goal line.

At the end of the period when you want to generate a rebate claim/credit (optional)

You can use the menu option to generate a credit memo back to the customer. Or Create a Report of what would be created at the time you run the report.

To Check a Customer, you can filter by customer or Customer Class. If you choose to not create credits a report will be generated to show you the amount and rebate levels

Note in our example the customer was on track to earn 2.0% back if they hit 100,000 in sales but did not reach that goal so only earned 1.5% as a Gold Member

## Web Eligibility Option:

DJF - [MAIL.tshinc.com-BASE.12-WEBCUST.REBATE.MAINT01251-david-10232020-11:11:52]

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Application

Web Rebate Eligibility Maintenance

Customer#: RACHEL BEST MEDICAL SUPPLY

1.Eligible N

Please make a selection, OK/END to Save, or Cancel

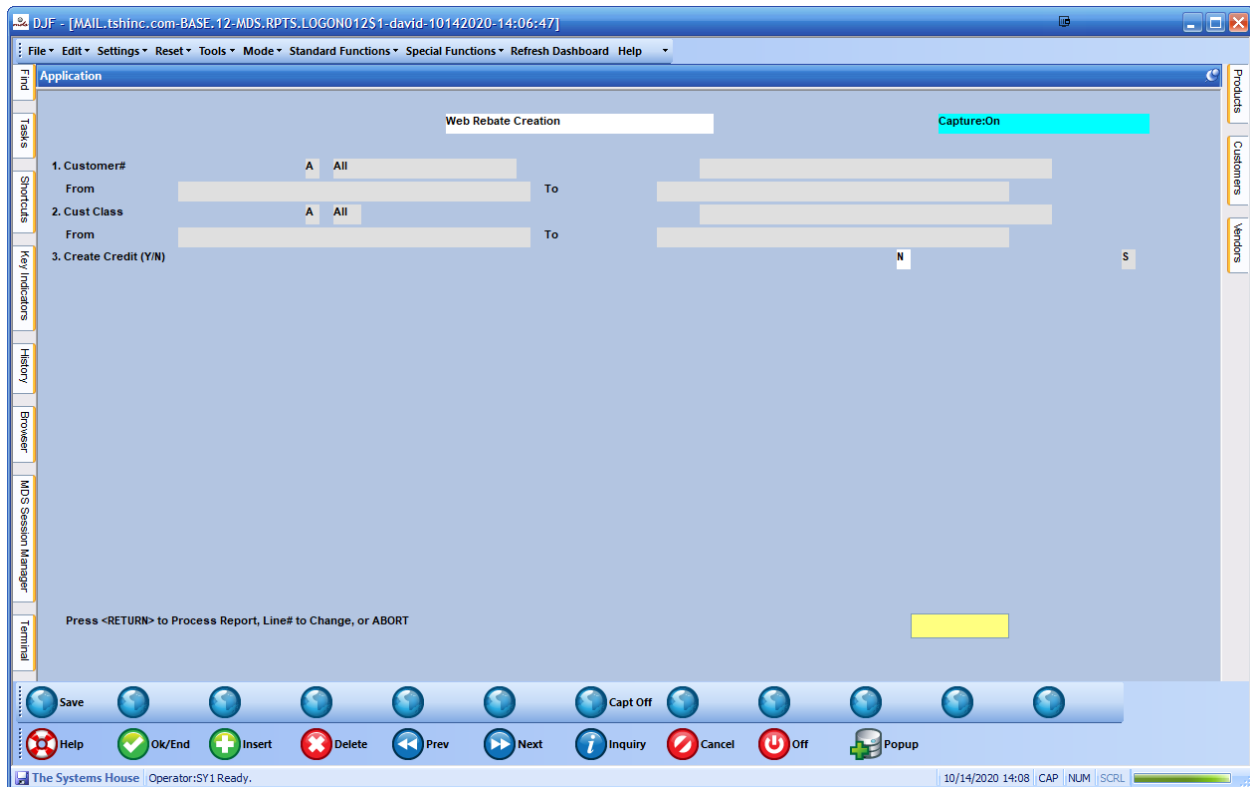
Help OK/End Insert Delete Prev Next Inquiry Cancel Off Popup

The Systems House | Operator:SF Ready. 10/23/2020 12:06 CAP NUM SCRL

**GENERAL HELP**

Use this field to determine if a customer is eligible for web rebates, if "N" then no rebate tracker will show on remotenet and no credit memo's will be created.  
Default is "" or "Y" both will allow rebates.  
ALLOWABLE ENTRIES ARE Y, N

End Help  
Inquiry  
Cancel



Example Report Output (designed to be exported as a CSV or excel report)

Web Rebate Credit Memo Creation Report

Customer Credit Memo Creation Results 10/14/20 02:53:51pm

Customer, Customer Name, CM#, Total, Message

1020, COLUMBIA\*PRESBYTERIAN, None, 0, Skipped Not Eligible for Credit/Rebates

NWT017205, MEDICAL RECORDS, None, 0, Skipped Not Eligible for Credit/Rebates

RACHEL, BEST MEDICAL SUPPLY, None, \$0.00, Skipped Not Eligible for Credit/Rebates

CCT033321, LAB CUSTOMER SERVICE, None, 0, Skipped Not Eligible for Credit/Rebates

HHLC, HOPE LIFE CARE, None, 0, Skipped Not Eligible for Credit/Rebates

CSU, COASTAL RECOVERY, None, 0, Skipped Not Eligible for Credit/Rebates

SAT2, MASTERS/SAT2, Review Mode, 2.00, Annual Spend Rebate Credit 10/14/2020 Silver Rebate Member PCT 1.00% of \$200.00

WMP010107, WMP 107, None, 0, Skipped Not Eligible for Credit/Rebates

WDT033364, PHARMACY RESIDENCY PROG, None, 0, Skipped Not Eligible for Credit/Rebat

