

MDS Quick Guide – NDC Rebate Sales Tracing

V 1.0 updated 10/27/20

V 1.1 updated 11/25/20

Overview: *Case MDS*15577*

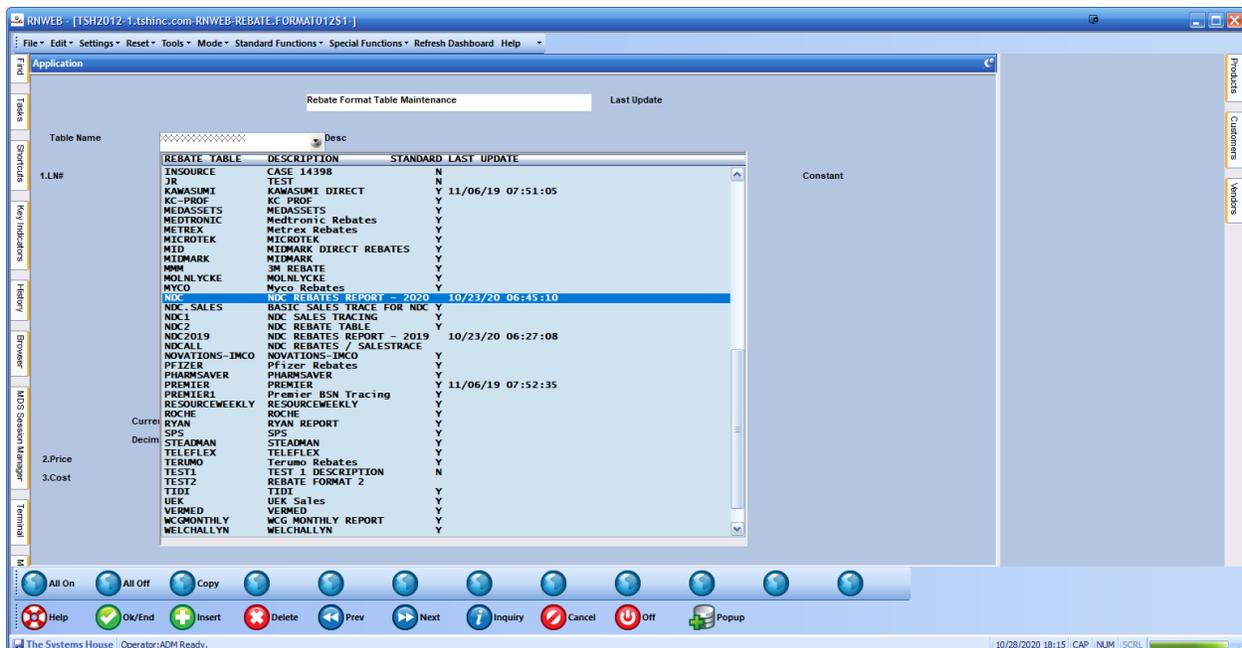
This quick guide will walk you through the basic steps of setting up the NDC Sales Tracing Format using the MDS Rebate Format Subsystem and allow you to create your sales tracing in the format specified by NDC (National Distribution and Contracting).

For the purposes of this quick guide, we will assume you have your contracts setup with the correct customers, and products so this guide will cover the sales tracing creation, setup, and options.

Note if you want to automatically email this sales tracing you can also get MDS case 15371 to allow you to schedule reports from the MDS Job Scheduler.

Step 1. Adding your Distributor ID or Dealer ID to the Sales Tracing and Creating your own Custom Rebate Format.

The rebate format system comes with a library of formats based on current vendor and manufacturer requirements. To use them you normally would copy them a custom version and rename for your purposes. When new update comes out you can then repeat this process or manually update your formats.

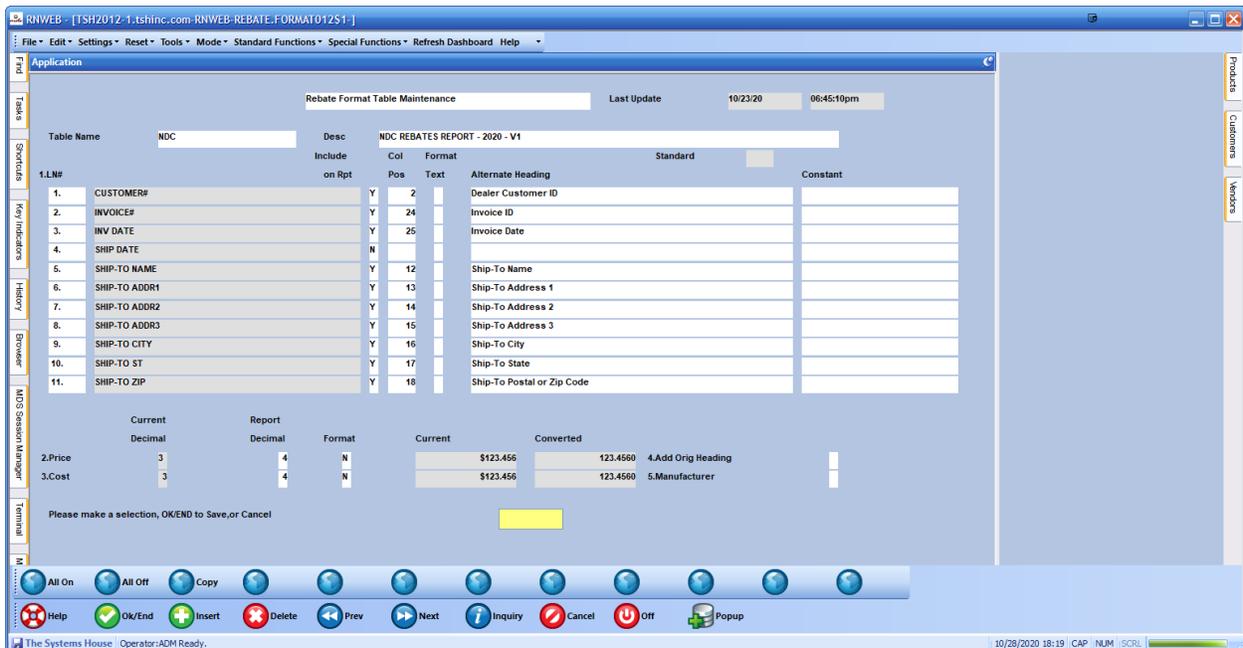


The Standard Y.N flag indicates if this is a “standard” or default template , or a custom one specific to your company.

Once you choose a template and review it – you can copy them to your custom version



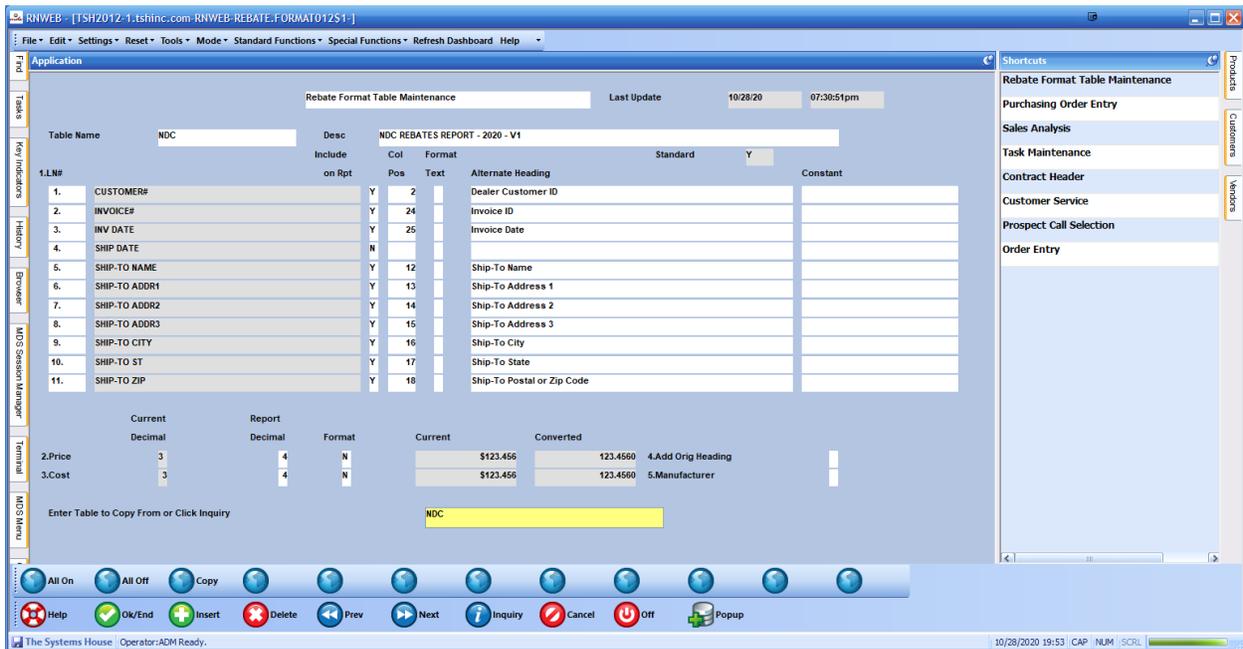
If you see the prompt Do you want to check out REBATE.FORMAT XXXX (Y/N) - you should not be answering yes. You should say N for No and then use the copy button to create your own version .



In this instance since I want to create a new format based on the REBATE FORMAT Table called “NDC”

I am entering my new name for my new customized format. The copy of the format will default the name to the existing name and the name of the database – in our Example NDC-RNWEB , as however the names are up to you.

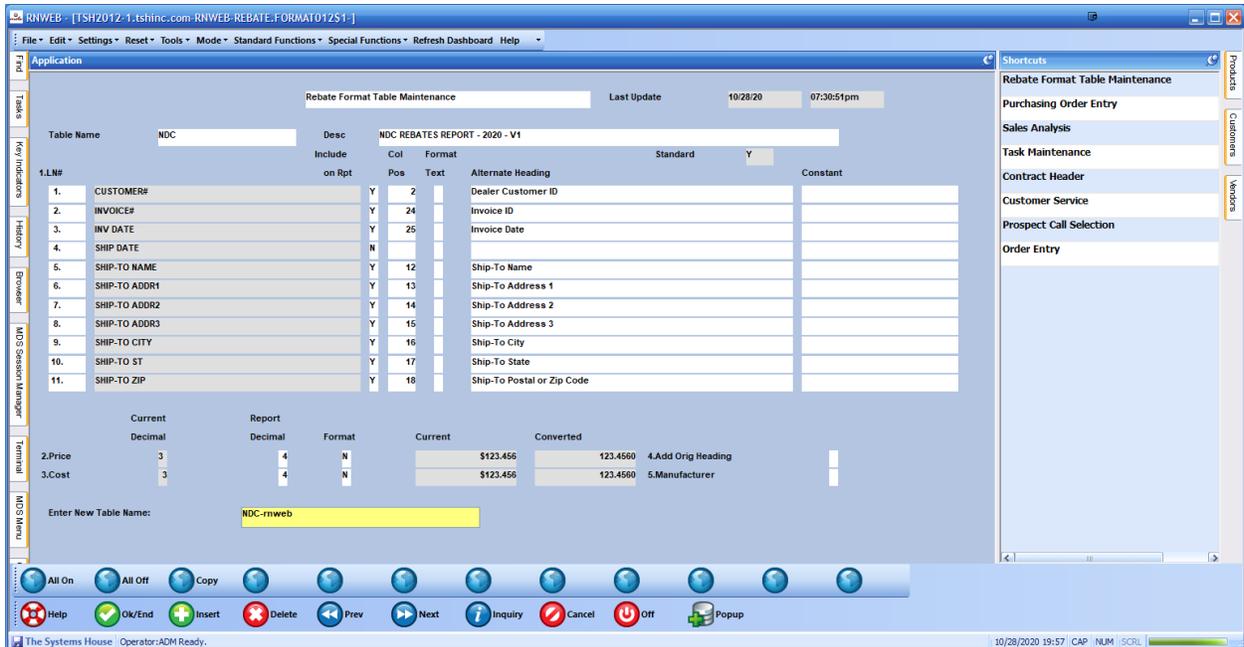
Once copied it will add the word Custom to the Description of the Format so you know this is the one that have been customized for your Database and Company.



After clicking the copy button I am prompted for the format to copy. By default it will take the name of the current format you are viewing – however you can type the name of another or click on the inquiry button.

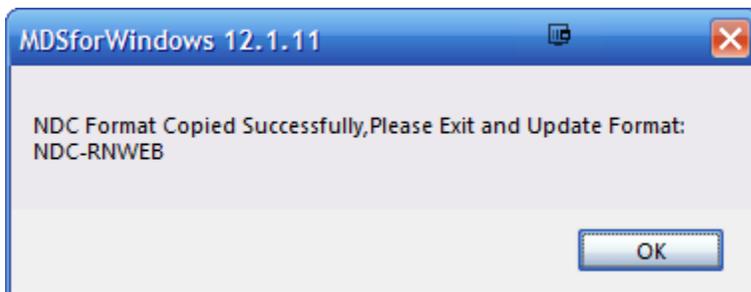


Once we have selected the format we want to copy. We then enter or take the default for the new name. Note you cannot overlay existing templates in this process. You would need to either delete the existing ones to overlay. Or create a new template. We recommend creating new templates so you can go back to a previous version if you have any issues.

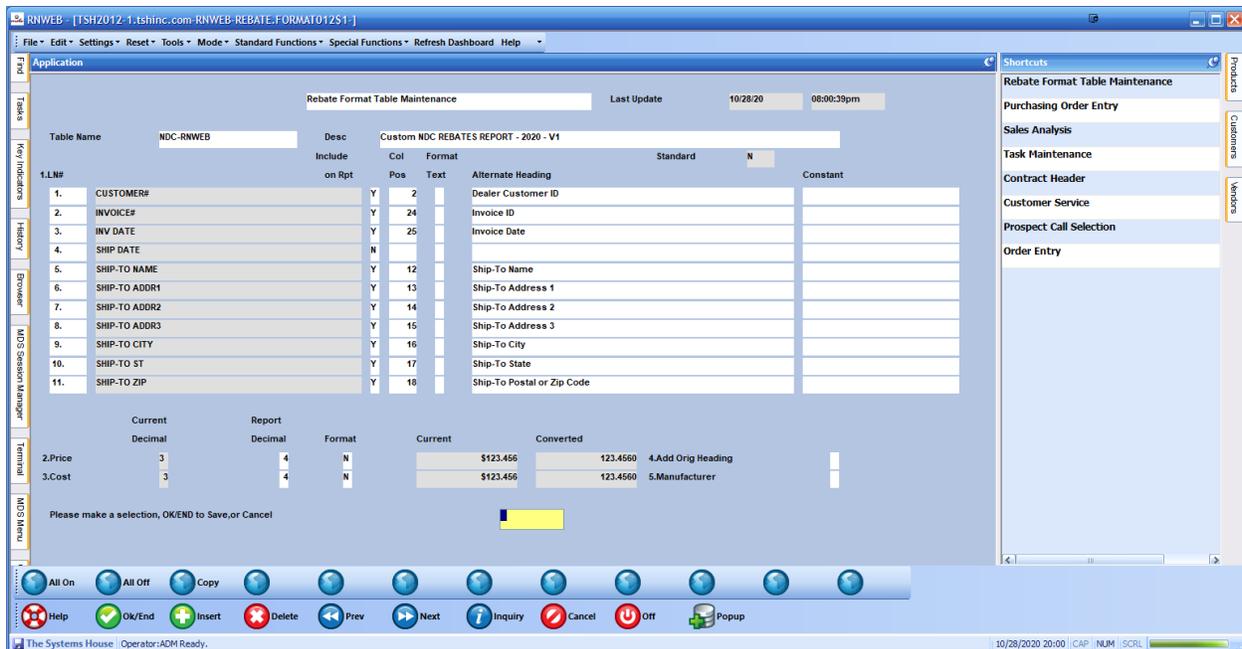


After you enter the new name and hit return/enter

You will be prompted to exit and then go back and update your new format.



After you enter the new format name – you can verify you have updated it correctly by checking the last update date and time, in the top right corner. Note the name has Custom in the front of the description, however again we can update that if need be.



As of 10/28/20 – this format is the latest available but as new updates come out , you would simply repeat this process to create your format.

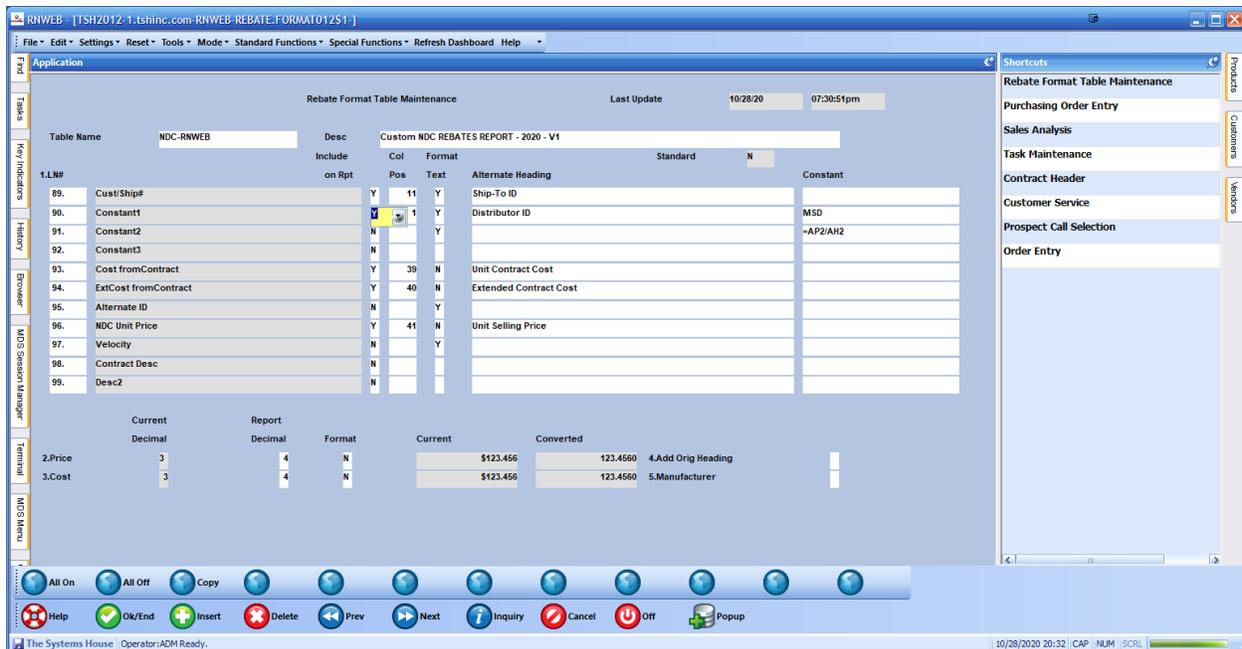
Step 2. Adding your Custom Business Data to the Sales Tracing Rebate Format

NDC Requires certain elements of data from different distributors, while each member is unique, we attend to give you all the tools you need to fulfill all the requirements for all sales tracings.

For GPO Customer ID setups see notes in the section below titled GPO Setups

Items to update.

- A. (ndc dealer id) – line 90 – constant – change to your NDC Customer / Distributor ID – IE “Distributor ID as assigned by NDC” Example MSD



- B. Customer Master Fields (optional)
DEA#, GLN, HIN#
- C. Product Master (optional)
Vendor Item#, NDC#, UPC/UPC Code, UNSPSC, Manufacturer, Manuf. Product#

Step 3. GPO Setup (If Required)

There are additional fields required when reporting for GPO's (Group Purchasing Organization)

Contract Header Fields –

Buying Group will be used to setup the Gpo Contract Id/ GPO Agreement Distributor ID “Distributor's GPO ID # as assigned by NDC” – Each contract may require this information.

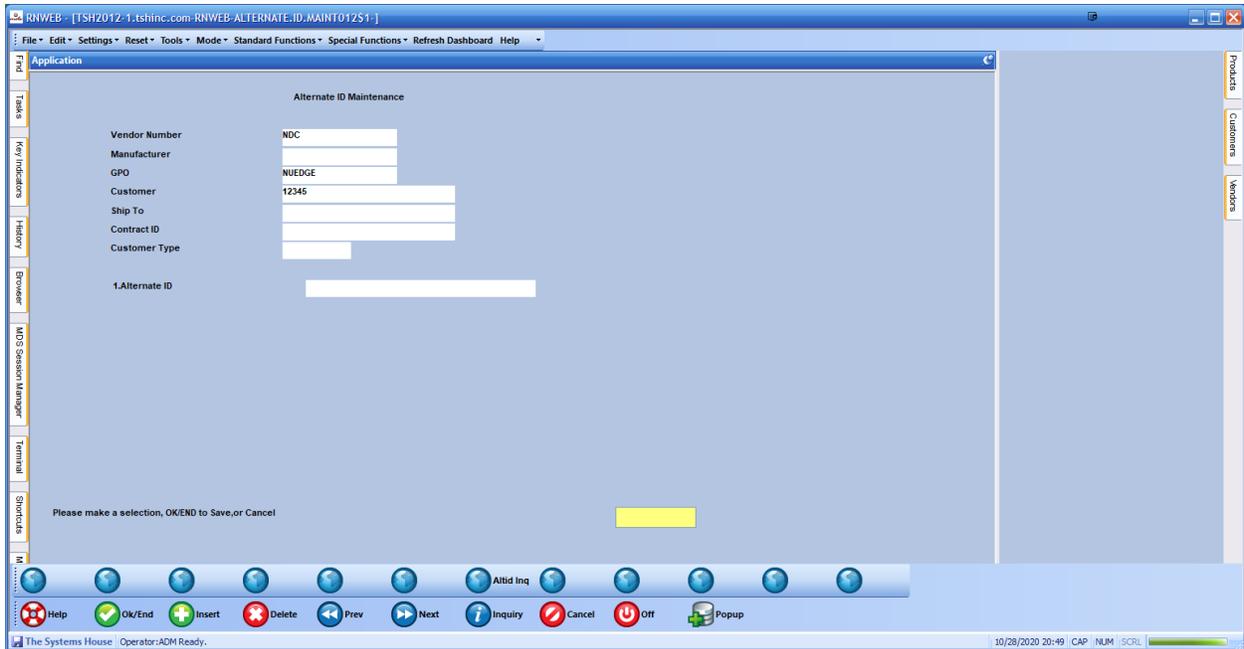
Customer Master or Ship to Or Alternate ID Fields

Your Customer's GPO ID # or LIC as assigned by GPO.

We are using the HIN in the Ship to maintenance, if blank then HIN in customer master

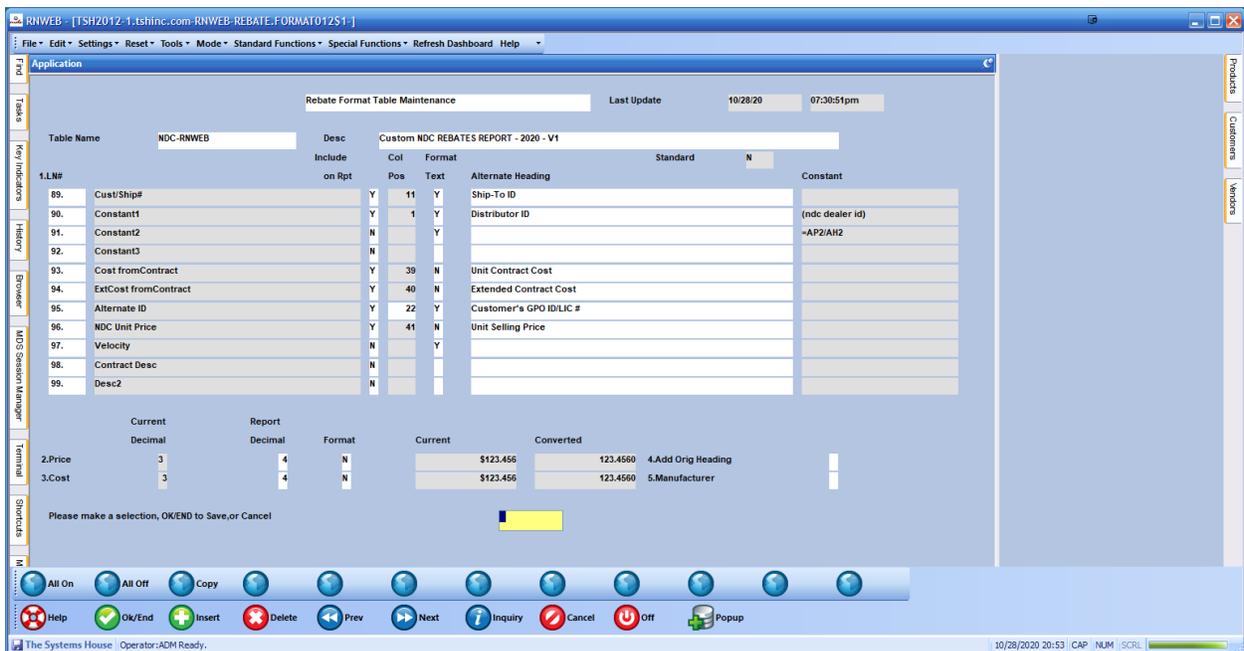
Note if a customer has a different identifier for different GPO's you would need to use Alternate ID Maintenance to convert to the new field – you can use any combination of the following to assign the GPO “Roster ID” to that customer or shipping address.

Vendor Number, Manufacturer, GPO, Customer, Ship To, Contract ID, Customer Type

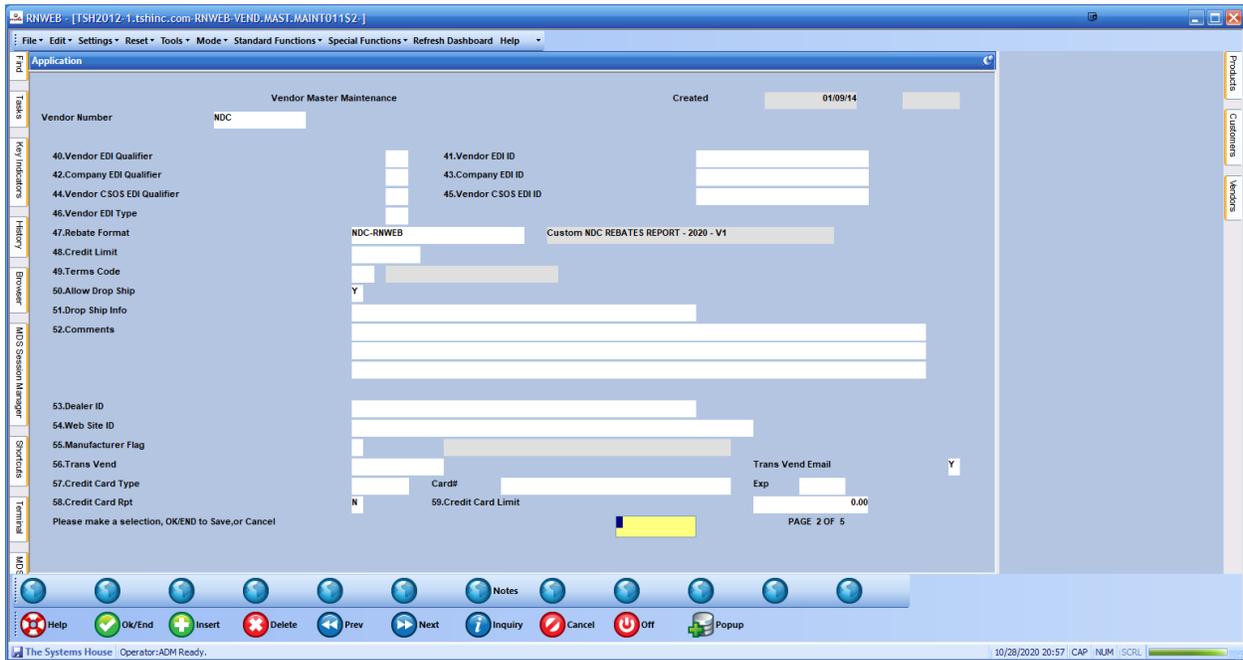


In this example any rebates for customer 12345 for GPO “NuEdge” will use the code NU-10395

IF using the alternate ID, you would also have to update your sales tracing format, example below using the alternate if field.



Step 3. Adding your Sales Tracing Rebate Format to your Vendors and Running



Create your Sales tracing or schedule it using the MDS Job Scheduler

