PLANNING & ADMINISTRATION

- Define pricing, discounts, and rebates by any customer, product, or transactional hierarchy/attribute such as geography, market, project, product group, UOM, ship point, simplifying agreement maintenance and increasing accuracy
- Minimise agreement maintenance time via pricing upload facilities
- Utilise date effectivity and advanced agreement inclusion and exclusion facilities for all pricing/rebates to quickly determine membership parameters and ensure accuracy
- Automate UOM conversions in relation to pricing and discounts/upcharges: pallets, cases, bags, yards, meters, each
- Manage buying group/GPO membership; along with date sensitivity, seamlessly execute related pricing, discounts, administration fees, commissions, and rebate programs
- Greatly reduce agreement maintenance by managing only the master file data and not individual agreements with unlimited attribute and hierarchy membership definitions
- Utilise templates and automated workflows to speed deal creation and approval

PRICING

- Single source of truth for pricing, calculated in real-time, regardless of source of request (ERP, handheld, eCommerce, catalog extracts, portals)
- Super speed in-memory pricing engine scales to over 1 million price requests per minute, ensuring pricing is always calculated accurately and in real-time across an omni-channel sales strategy
- In-memory pricing greatly reduces price catalog generation time and reduces price requests as a bottleneck in eCommerce or other applications
- Utilise a multitude of date types for pricing: order date, requested ship date, requested receipt date
- Configurable price override functionality with security, reason codes/GL expense posting parameters
- Utilise configurable calculation methods for pricing: List, $ or % markups, margin pricing, net or contract pricing, all with date effectivity
- Automate bracket/tiered or special pricing arrangements
- Manage pre and post list adjustments; full control over what is shown on the customer invoice
- Special pricing for kits/bundles/configured products
- Project based pricing when specified at order entry
- Invoice address, delivery address, or shipment location based pricing
- Flexible pricing rules for best price, priority pricing, and sequencing eliminate development work for special situations
- Unlimited discount levels with control over stackability
- Automated weight based freight charges with proper GL recognition
- Automatic price adjustments based on planned or actual payment terms

PROMOTIONS & REBATES

- Utilise cross-sell/upsell and directed selling abilities to increase order volumes and drive additional revenue

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Features and Benefits Continued...

- Ensure all customer rebate and loyalty programs are financially accrued and settled in a timely manner
- Create or adjust accrual programs with retrospective dates, with the system automatically accounting for historical invoice data and financial postings
- Ensure all pricing elements are captured and accruals properly clawed back during the RMA/RTV process
- Configurable rebate break parameters (inclusive vs. stepped) ensures accurate ledger postings for future rebate liabilities
- Manage loyalty programs for both direct clients as well as installers
- Leverage mix and match and flexible combo promotional offers with configurable purchase requirements and discount levels to drive additional revenue
- Utilise advanced free goods promotions to specify required purchased goods and free good rewards (one or many choices)
- Easily create customer volume incentive or growth plans, systematically managing accruals, payments, and reconciliation processes

⚖ SETTLEMENTS

- Create discount/accrual categories with configurable GL income/expense tracking options
- Expense activity as it occurs, greatly reducing end of month processing via real-time accrual processing and settlement facilities (automated updates/adjustments/ corrections)
- Settle customer trade spend automatically or manually through accounts payable or accounts receivable

- Calculate and settle commissions, bonuses, and incentives; split commissions, growth programs, net of rebates, deductions, or early payment discounts
- Reduce leakage with a full deduction workbench: quickly reconcile short payments, minimise days of sales outstanding, and greatly reduce administration efforts
- Full claims workbench to quickly process customer payment requests/chargebacks: code, age, report, and issue AR credits
- Accrue rebates nightly, but settle on any frequency (monthly, quarterly, yearly) by program type

⚬ ANALYTICS

- Empower sales professionals to make informed decisions at the time of sale by fully understanding margins including all rebates and retrospective deals
- Develop funds/budgets and analyse promotional spend and remaining balances within those fund categories
- Invoice line level expense and income reports display complete transactional details including agreement ID, customer/ products, invoice number, GL expense/liability accounts, and rates/values, providing full auditability and margin analysis
- Aged and outstanding payment reports with 30/60/90/120 days aging, custom status filters, financial amounts requested/paid/ remaining by customer/invoice account/ promotion/GL effective dates and more
- Customer and promotional extract reports providing financial analysis of planned spend, accrued spend, paid amounts, and remaining balances by time period

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