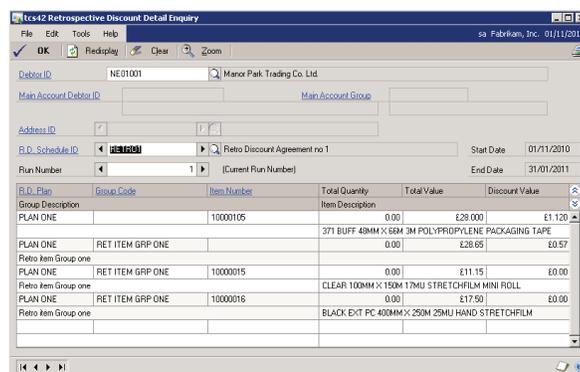# Sales Retrospective Discounts

The Need

Customer incentives come in many forms and need to be appropriate to individual trading circumstances. For some customers, particularly those who are buying regularly but in small amounts, it is often more practical to incentivize them over a period of time by providing a retrospective discount plan that allows the customer to achieve a cumulative discount. The plan may be related to individual product volumes or overall turnover.

The Solution

Sometimes referred to also as 'Customer Earned Rebates,' this module allows for the management and monitoring of these plans.

Key Features

- Progress monitoring

Inquiries and reports allow for easy access to all levels of information, from a detailed view of a single customer's latest position through to a summary of the overall potential company liability against accrued sales retrospective discounts.

- Discount parameters

Discounts may be given irrespective of volume or value of purchases. It is also possible to build plans with staged targets based on either volume or value. These may relate to individual items or to item groups. The discounts themselves may be 'value off' or 'percentage off'.

Key Features cont'd...

• **Automated update routines**

A single separate routine allows the current sales retrospective discount position to be updated regularly from the latest sales transactions, both invoice and credit. Further routines allow for the opening and closing of qualifying periods and for the purging of completed plans.

• **Flexible discount plans and schedules**

Sales retrospective discount plans and schedules can be configured to cover qualifying time periods. Discounts may be applied to individual items or to groups of items. These can be assigned to ranges of customers or even at individual address level to provide maximum flexibility.

What It Means For You

• **Manage complex plans and schedules**

Demand for sales retrospective discounts often originate from the customer themselves. Larger corporate customers may dictate the ways in which they wish to see these arrangements structured. The module is designed to be flexible enough to meet a range of needs that may differ widely from customer to customer.

• **Accrue for discount liability**

Potential discount liability can fluctuate dramatically depending upon whether or not customers hit specified targets within qualifying periods. Automated sales retrospective discount management within the core product enables financial controllers to make informed and accurate predictions of potential liability.

• **Monitor true profitability**

Accruing for retrospective discount liability within the core system facilitates the analysis of true customer profitability over a period of time.

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Dynavistics transforms your "I wish we could" into "I know we can" with innovative solutions to provide relief from common business software frustrations—helping you to run your business more effectively and get paid faster. Our applications are used by businesses across a wide variety of industries to extend the useful lifetime of their software investment while improving staff productivity and filling the gaps in collections, delivery, trade promotion and distribution software processes.

Dynavistics makes it easy to integrate with Microsoft Dynamics GP, Microsoft Dynamics AX, and Microsoft Dynamics NAV, as well as other leading ERP systems. Whether your frustrations result from software shortcomings in purchasing, inventory management, or accounts receivable—we offer solutions that complete the processes and bridge the gaps.

TRINITY

Trinity from Dynavistics, Inc. is a collection of advanced distribution features that work hand in hand with Microsoft Dynamics® GP to enhance every aspect of your supply chain process. Simply put, Trinity turns the basic Dynamics GP inventory modules into a full-featured distribution powerhouse.

Running a successful distribution business requires more than just inventory management. That's why Trinity was designed to improve every aspect of your distribution operation from Sales, Pricing, and Customer Service to Purchasing & Replenishment, Inventory Control, and Delivery Logistics. Adding Trinity to Dynamics GP makes your business *more effective, efficient, competitive and profitable*.

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