

2014

# REBATE TRACKING with ProTrac

Claim all of your rebate dollars without  
spending hours in the process

**Each time that we install an Electrical Distributor** who is depending on a Legacy Software package to claim their rebates we are told that the system is catching every rebate penny.

**Each time ProTrac's Rebate claim dollars are higher than they have ever been.**

Rebate claiming is one of the places in a system where we normally realize the most direct path to an excellent Return on Investment.

**Give us a call and let's talk about the ProTrac Process for ensuring that there is not money left on the vendor's table.**

800-711-7374

Mel Carney -Sales  
Professional Data Systems  
2/19/2014



Graphic # 1

TST-Contract Pricing

Contract Pricing TST ProTrac(R) 8.19.01 MDC ctrct001

Search:

Contract ID	Description	Starting Date	Ending Date	Vendor No
ACES	ACES PRICING	05/03/2004	05/03/2006	170
AT1	A&T MFG, PAINT RACK	09/15/2005	11/15/2005	203
DEA	CONTRACT PRICING	01/01/2003	01/01/2049	100
GOV2	2ND POST OFFICE BLDG	11/30/2005	05/01/2006	203
UNIV	NEW DORMS AT UNIVERSITY	02/02/2005	09/01/2007	203

Sort by:  Contract ID  Starting Date  Ending Date

Notes F5/Srch Add Edit View Delete 1/Rpt Exit

Import Export

ESC=Exit

Enter data or press ESC to end.

Contract Pricing allows you to define special pricing for a customer or a customer job. A customer can have an **unlimited number of Contract Price Programs**. The pricing can be specific for this job. The contract price can have its own set of prices.

A Contract is be set up for one job and one customer.

**Ship and Debit / Rebates**

**Contract pricing is used to track Rebates.**

**Graphic #1:** This is a graphic which displays 5 different Contracts which are active at this time.

**Graphic #2:** This a detail list of product which have special pricing for a Contract Called GOV 2.

Graphic # 2

TST-Contract Pricing Det

Contract Pricing Det TST ProTrac(R) 8.19.01 MDC ctrct002

ID: GOV2 2ND POST OFFICE BLDG

Search:

P/L	Item Number	Contract Price	Contract Cost	/	Rebate
MLT	A1-300	85.00	75.0000		Yes
SL	AL03601	1.25	0.5500		Yes
SL	AL3691	1.14	0.4500		Yes
SL	SL20689	19.75	8.8500		Yes
SL	SL20783	26.50	11.9500		Yes
SL	SL48230	47.85	20.8500		Yes
SL	SL50900	245.00	106.0000		Yes
SL	SL50901	220.00	95.0000		Yes

Next Prev F5/Srch Add Edit Copy Delete 1/Rpt Calc \$

Exit

F1=Help ESC=Exit

**In this example everything on the contract is carries a Rebate. They are all marked with a YES under the Rebate heading.**

**If this were not a Contract that was involved with rebates the rebate column would display No.**

**To arrive at a price for a line on a contract, key or select the item from a drop down list and then determine a % price or a straight dollar price for the item.**

**Note: If the rebate is for a specific building/or Project the rebate would only be for that Ship to –NOT FOR ALL CUSTOMER PURCHASES**

Graphic #3

```

+++ TEST TEST TEST TEST ***          TST                                     12/15/05 -
ProTrac(R) 8.19.01                                                           r-1
mel

Rebate by Sales Rep                                                           PAGE:

```

SLS REP	ACCT NO	CUSTOMER NAME	INVOICE NUMBER	INVOICE DATE	P/L	ITEM NO	ITEM DESCRIPTION	QTY SHIPPED	STAND COST	CONTRACT COST	EXTENDED REBATE \$
JON	32ND01	32ND ST. CONSTR	1477	09/20/05	SL	AL03601	4 WATT 120 V C7 CAND	10	0.6400	0.5500	0.90
			1501	10/12/05	SL	AL03601	4 WATT 120 V C7 CAND	1	0.6400	0.5500	0.09
			1503	10/19/05	SL	AL03601	4 WATT 120 V C7 CAND	1	0.6400	0.5500	0.09
JON	32ND01	32ND ST. CONSTR					Customer Total				1.08
	A-ADK01	A-ADISSON'S ELE	1462	09/13/05	SL	AL03601	4 WATT 120 V C7 CAND	5	0.6400	0.5500	0.45
			1462	09/13/05	SL	AL3691	SGL BULB 7 WT CNDLAB	1	0.6200	0.4500	0.17
			1462	09/13/05	SL	SL20689	9 WATT T4 2-PIN 2700	1	9.5000	8.9500	0.55
			1462	09/13/05	SL	SL50901	1 LAMP 277V SLY BALS	1	114.7600	95.0000	19.76
			1463	09/13/05	SL	AL03601	4 WATT 120 V C7 CAND	1	0.6400	0.5500	0.09
			1463	09/13/05	SL	AL3691	SGL BULB 7 WT CNDLAB	1	0.6200	0.4500	0.17
			1463	09/13/05	SL	SL20689	9 WATT T4 2-PIN 2700	1	9.5000	8.9500	0.55
			1463	09/13/05	SL	SL50901	1 LAMP 277V SLY BALS	1	114.7600	95.0000	19.76
			1464	09/13/05	SL	AL03601	4 WATT 120 V C7 CAND	5	0.6400	0.5500	0.45
			1464	09/13/05	SL	AL3691	SGL BULB 7 WT CNDLAB	1	0.6200	0.4500	0.17
			1464	09/13/05	SL	SL20689	9 WATT T4 2-PIN 2700	10	9.5000	8.9500	5.50
	A-ADK01	A-ADISSON'S ELE					Customer Total				47.62
JON							Sales Rep Total				48.70
Total Rebate:											48.70

Graphic #3: This report was run by sales representative and it shows the customer, invoice number, item number, description, # shipped, Standard cost, Contract cost, and extended rebate for these transactions

```

Contract ID: GOV2  2ND POST OFFICE BLDG
Starting Date: 11/30/2005
Ending Date: 05/01/2006

```

P/L Item Number	Description	Price	Cost	Rebate
MLT A1-300	1/2" DRILL	85.00	75.00	Yes
SL AL03601	4 WATT 120 V C7 CANDELABRA	1.25	0.55	Yes
SL AL3691	SGL BULB 7 WT CNDLABRA BASELB	1.14	0.45	Yes
SL SL20689	9 WATT T4 2-PIN 2700K 800	19.75	8.85	Yes
SL SL20783	9 WT T4 2-PIN 3000K 800 SERIES	26.50	11.95	Yes
SL SL48230	1 LAMP 120V MAG SYL BALST	47.85	20.85	Yes
SL SL50900	1 LAMP 277V SLY BALST 'F'ENC	245.00	106.00	Yes
SL SL50901	1 LAMP 277V SLY BALST 'F'ENC	220.00	95.00	Yes

```

Contract ID: UNIV  NEW DORMS AT UNIVERSITY
Starting Date: 02/02/2005
Ending Date: 09/01/2007

```

P/L Item Number	Description	Price	Cost	Rebate
MLT A1-300	1/2" DRILL	85.00	75.00	Yes

```

+++ TEST TEST TEST TEST ***          TST                                     12/15/05 - 11:13
ProTrac(R) 8.19.01                                                           r-ctrct1
mel

Contract Pricing Plans                                                           PAGE: 2

```

P/L Item Number	Description	Price	Cost	Rebate
SL AL03601	4 WATT 120 V C7 CANDELABRA	1.25	0.55	Yes
SL AL3691	SGL BULB 7 WT CNDLABRA BASELB	1.14	0.45	Yes
SL SL20689	9 WATT T4 2-PIN 2700K 800	29.30	8.95	Yes
SL SL50901	1 LAMP 277V SLY BALST 'F'ENC	220.00	95.00	Yes

This report shows two of the Contracts in the system with the Price and Cost of each item and that the item is on a vendor's rebate.

Vendor: 203 Contract No: UNIV Contract Name: NEW DORMS AT UNIVERSITY  
 Claim Period: 05/01/2005 - 11/30/2005

ACCT NO	CUSTOMER NAME	ITEM DESCRIPTION	INVOICE NUMBER	INVOICE DATE	ITEM NO	QTY SHIPPED
32ND01	32ND ST. CONSTRUCTIO	4 WATT 120 V C7 CANDELABR	1503	10/19/2005	AL03601	1
32ND01	32ND ST. CONSTRUCTIO	4 WATT 120 V C7 CANDELABR	1501	10/12/2005	AL03601	1
32ND01	32ND ST. CONSTRUCTIO	4 WATT 120 V C7 CANDELABR	1477	09/20/2005	AL03601	10
Sub-Total Stock:						12
A&C01	A&C DESERT ELECTRIC	SGL BULB 7 WT CNDLABRA BA	1332	05/25/2005	AL3691	5
Sub-Total Stock:						5
A-ADK01	A-ADISSON'S ELECTRIC	4 WATT 120 V C7 CANDELABR	1464	09/13/2005	AL03601	5
A-ADK01	A-ADISSON'S ELECTRIC	4 WATT 120 V C7 CANDELABR	1329	05/25/2005	AL03601	10
A-ADK01	A-ADISSON'S ELECTRIC	4 WATT 120 V C7 CANDELABR	1330	05/25/2005	AL03601	10
A-ADK01	A-ADISSON'S ELECTRIC	4 WATT 120 V C7 CANDELABR	1463	09/13/2005	AL03601	1
A-ADK01	A-ADISSON'S ELECTRIC	4 WATT 120 V C7 CANDELABR	1338	06/02/2005	AL03601	25
A-ADK01	A-ADISSON'S ELECTRIC	4 WATT 120 V C7 CANDELABR	1462	09/13/2005	AL03601	5
A-ADK01	A-ADISSON'S ELECTRIC	SGL BULB 7 WT CNDLABRA BA	1462	09/13/2005	AL3691	1
A-ADK01	A-ADISSON'S ELECTRIC	SGL BULB 7 WT CNDLABRA BA	1463	09/13/2005	AL3691	1
A-ADK01	A-ADISSON'S ELECTRIC	SGL BULB 7 WT CNDLABRA BA	1331	05/25/2005	AL3691	1
A-ADK01	A-ADISSON'S ELECTRIC	SGL BULB 7 WT CNDLABRA BA	1464	09/13/2005	AL3691	1
A-ADK01	A-ADISSON'S ELECTRIC	SGL BULB 7 WT CNDLABRA BA	1329	05/25/2005	AL3691	10
A-ADK01	A-ADISSON'S ELECTRIC	9 WATT T4 2-PIN 2700K 800	1462	09/13/2005	SL20689	1
A-ADK01	A-ADISSON'S ELECTRIC	9 WATT T4 2-PIN 2700K 800	1463	09/13/2005	SL20689	1
A-ADK01	A-ADISSON'S ELECTRIC	9 WATT T4 2-PIN 2700K 800	1464	09/13/2005	SL20689	10
A-ADK01	A-ADISSON'S ELECTRIC	9 WATT T4 2-PIN 2700K 800	1329	05/25/2005	SL20689	1
A-ADK01	A-ADISSON'S ELECTRIC	1 LAMP 277V SLY BALST "F"	1462	09/13/2005	SL50901	1
A-ADK01	A-ADISSON'S ELECTRIC	1 LAMP 277V SLY BALST "F"	1463	09/13/2005	SL50901	1
A-ADK01	A-ADISSON'S ELECTRIC	1 LAMP 277V SLY BALST "F"	1329	05/25/2005	SL50901	10
Sub-Total Stock:						95
Total Stock:						112
Date: 12/15/2005 - Thursday			*** TEST TEST TEST TEST ***			
Time: 11:21:41			REBATE REPORT			PAGE: 2
Vendor: 203 Contract No: UNIV Contract Name: NEW DORMS AT UNIVERSITY						
Claim Period: 05/01/2005 - 11/30/2005						

**This report is a recap of the detail rebate report**

\*\*\* TOTALS PAGE

ITEM DESCRIPTION	ITEM NO	QTY SHIPPED
4 WATT 120 V C7 CANDELABR	AL03601	68
SGL BULB 7 WT CNDLABRA BA	AL3691	19
9 WATT T4 2-PIN 2700K 800	SL20689	13
1 LAMP 277V SLY BALST "F"	SL50901	12
Total Stock:		112

**This report gives you both an itemized list and summary list of the number of each rebated item.**

**Rebates are made for the manufacturer. The pool of money that is on the table belongs to**

**manufacturer until the distributor claims their share. If the wholesaler does not claim their rebate dollars they will be swept into the manufacturer's profit bucket.**

**ProTrac believes that in a SHIP and DEBIT/ Rebate program, that the money belongs to the Wholesaler and as a result ProTrac - tracks and claims every penny!**