



Ellipse Rebates Product Overview

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In Microsoft Dynamics 365 for Operations, functionality for managing sales rebates is available out of the box, however, more sophisticated sales incentive programs require extensive manual processing. This can result in high administrative costs and data accuracy issues.

Ellipse Rebates is designed to streamline and automate complex sales rebates by offering additional functionality including configurable rebate calculations, tiered rebates, and partial rebates among many other features.

The Solution

Microsoft Dynamics 365 for Operations provides a rich data integration feature that automatically captures and stores the various sales activities in real time, eliminating manual transactions.

Ellipse Rebates expands this functionality with advanced features that are built directly into the Microsoft Dynamics 365 for Operations architecture and deliver:

- Automated data tracking, analysis and reporting
- More timely and accurate financial management
- Elimination of manual incentive program activities
- Accuracy and data integrity improvements
- Increased productivity and cost savings

Key Features

- Single system – All data is in one automated system
- Familiarity – Microsoft user interface and menus

- Configurable Rebates Calculations – The payment formula is structured according to dynamic organizational rules and requirements (including discounts, taxes, rebates, miscellaneous charges, etc.)
- Systematic Calculations – Elimination of manual data entry
- Tiered Rebates – Ability to build unlimited tiers based on amount or quantity
- Ship to Customer Account - Ability to calculate rebates based on delivery address
- Miscellaneous Rebates - Ability to adjust rebate payment at any point of the payment processing
- Multi-Currency - Full support for sales transactions in multiple currencies
- Configurable Units of Measure - Unit conversion handling for quantity based sales
- Pre-Qualification Formula - Ability to specify rebate qualification rules
- Traceability – Transaction detail is available to research and validate, significantly increasing data accuracy and transparency
- Reporting – Pre-built and ad-hoc reporting functionality
- Accounts Payable - Full integration with standard Dynamics 365 for Operations Accounts Payable module
- Accounts Receivable - Full integration with standard Dynamics 365 for Operations Accounts Receivable module via credit memo
- Partial Rebates – Process rebates in partial payments
- Multiple Rebate Payments - unlimited number of rules allowed to be set up for each transaction
- Prior Rebates - Include prior rebates in the formula for future rebates
- Payments vs Invoices - rebates can be paid based on customer payments or customer invoices