

Rebates

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In Navusoft, rebates can be configured in three flexible ways: as a percentage, as a flat amount added on top of an index, or as a percentage of an index after a defined baseline. This allows rebate structures to be tailored to specific pricing agreements and market-based calculations.

The screenshot displays the configuration for 'OCC Rebate Testing' (ID: 2671). The account is active and located at 7155 Old Katy Rd, Houston, TX 77024, US. The account manager is Matthew Van Doren (Accounting). The terms are Net 30, and the invoice delivery is printed. The billing group is Commercial Advance, and the billing cycle is ADVANCE - MONTHLY with no billed thru date. A table shows current and future rebate amounts for various periods (1-30, 31-60, 61-90, 91-120, 120+), all currently at 0.00. The total recurring amount is \$0.00. Below this, a table lists three active services (3) under the 'Standard' category. Each service is a '10 YD Open Top Roll Off' with a frequency of 'On Call'. The first service (ID 5166) has a 'Cardboard - Indexed Rebate' of 'Cardboard Rebate Baseline 15.00 % 50.00' and a service note of '% only index rate'. The second service (ID 5180) has a 'Cardboard - Indexed Rebate' of 'Cardboard Rebate Baseline 25.00 Amount 0.00' and a service note of 'flat \$ of top of index'. The third service (ID 5181) has a 'Cardboard - Indexed Rebate' of 'Cardboard Rebate Baseline 10.00 % 50.00' and a service note of '% index after baseline, 10 off top then 50%'. All services were added as new business on 02/17/2026 or 02/23/2026 by Matthew Van Doren (Accounting).

Setup Requirements

Rate Index

Pathway: Setup > Services > Rate Index

Rebates are tied directly to rate index configurations, which is why the Rate Index plays a key role in how they are calculated in the system. While rebates are applied separately from billing, they rely on the underlying rate structure to ensure accuracy over time. This article covers how Rate Index setup supports rebate calculations and why maintaining accurate rate history is important when managing rebate activity.

The **Rate Index Setup** screen consists of two grids: an upper grid and a lower grid. The upper grid is where the rate index, used to group container rates, is created. The lower grid is where rate index values are added and managed by start dates.

RATE INDEX SETUP			SETUP > SERVICES > RATE INDEX
<div style="display: flex; justify-content: space-between;"> + ↻ </div>			
ID	NAME	UNIT	
100	DOE Fuel Index	gallon	
101	DOE Fuel Index	gallon	
OCC	OCC Index	ton	
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px;">Rate Index Value</div> <div style="border: 1px solid #ccc; padding: 2px;">REFRESH</div> </div>			
ID	START DATE	VALUE	
1001	02/01/2024	40.00	⊖
1002	03/01/2024	35.00	⊖
1005	05/01/2025	50.00	⊖

Add a New Rate Index

To add a new Rate Index, click the green Add icon to open the Add Rate Index window. A new rate index does not need to be created each time rates change; instead, rate changes are recorded as new rate index values.

RATE INDEX SETUP	
<div style="display: flex; justify-content: space-between;"> + ? ✕ </div>	
ID	NAME
100	DOE Fuel Index
OCC	

ADD RATE INDEX
?
✕

ID

NAME

UNIT

SAVE

1. Enter a unique **ID** for the index you are creating. The system will not allow a new rate index to be created if the ID matches an existing one.
2. Enter a **Name** for the new rate index. Unlike the ID, the name does not need to be unique and can match an existing rate index.
3. Select the **Unit** of measure the rate is based off of.

Add Rate Index Values

After reviewing the current monthly rates for rebate-eligible commodities using external resources, navigate to **Rate Index** and add a new rate index value to reflect the updated rates for that month. **Do not modify an existing value.** Instead, enter a new value along with its effective start date.

The screenshot displays the 'RATE INDEX SETUP' interface. At the top, there is a breadcrumb trail: 'SETUP > SERVICES > RATE INDEX'. Below this, a table lists existing rate indices:

ID	NAME	UNIT
100	DOE Fuel Index	gallon
101	DOE Fuel Index	gallon
OCC	OCC Index	ton

A red arrow points from the 'OCC' row to a 'Rate Index Value' button. This button opens a modal titled 'ADD RATE INDEX VALUE'. The modal contains two input fields: 'VALUE' (set to 0.00) and 'START DATE' (with a calendar icon). A 'SAVE' button is at the bottom of the modal. A 'REFRESH' button is located at the bottom right of the main interface.

Below the modal, a table shows the history of added rate index values:

ID	START DATE	VALUE
1001	02/01/2024	40.00
1002	03/01/2024	35.00
1005	05/01/2025	50.00

Line of Business

Pathway: Setup > Services > Line of Business

Set the 'Enable Work Type Default Charge Codes' for each line of business that rebates are enabled.

UPDATE LINE OF BUSINESS
? X

LOB ID RO

NAME ACTIVE

Settings

Mobile

Optimization

Self-Service Ordering

Productivity and Profitability

SCREEN TYPE	<input type="text" value="1"/>	ENABLE USED OIL COLLECTION	<input type="text" value="No"/>
GL SEGMENT	<input type="text" value="D300"/>	ENABLE PROACTIVE ROUTE STATUS DRIVER CHECK	<input type="text" value="No"/>
TEMPORARY SERVICE GL SEGMENT	<input type="text" value="0078"/>	ENABLE MANIFEST PROCESSING	<input type="text" value="No"/>
UNEARNED REVENUE GL ACCOUNT	<input type="text" value="Unearned Revenue"/>	ENABLE MANIFEST GROUP WEIGHT ROUNDING	<input type="text" value="No"/>
WORK ORDER MINIMUM CHARGE CODE	<input type="text" value="Minimum Service Charge"/>	ENABLE ACTIVE DISPATCH	<input type="text" value="Yes"/>
OVER MAX WEIGHT CHARGE CODE	<input type="text"/>	ENABLE CHARGE CODE WASTE CODES	<input type="text" value="No"/>
RENTAL CHARGE CODE	<input type="text" value="Inactivity Fee"/>	ENABLE WORK TYPE DEFAULT CHARGE CODES	<input type="text" value="Yes"/>
RECURRING MINIMUM CHARGE CODE	<input type="text" value="Roll Off Service Minir"/>	ENABLE BIC REPORTING	<input type="text" value="No"/>
LIMIT CHARGE CODE TO MATCHING EQUIPMENT	<input type="text" value="No"/>	ENABLE LABOR TRACKING	<input type="text" value="No"/>
LIMIT CHARGE CODE TO MATCHING MATERIAL	<input type="text" value="No"/>	AUTOMATIC ROUTING & SEQUENCING	<input type="text" value="Disabled"/>
INVOICE SUMMARY DESCRIPTION	<input type="text" value="This is a test. RO LOB Setup"/>	ROUTE CUTOFF TIME	<input type="text" value="09 : 00 : 00 . 000 PM"/>
PRODUCTIVITY UNIT NAME	<input type="text"/>		

Charge Code

Pathway: *Setup > Services > Charge Code*

Rate indexes are added to an active service and work orders stemming from that service via a charge code. For each rebate, create a charge code where the Rate Index field has the Rate Index the charge code will be using selected.

CHARGE CODE SETUP

LINE OF BUSINESS: Roll Off EQUIP TYPE: All MATERIAL TYPE: All Hide Inactive

ID	NAME	DOT DESCRIPTION	LINE OF BUSINESS	EQUIPMENT TYPE	MATERIAL TYPE	RATE UOM	IS TAXAB
DISPOCCIDX	OCC Disposal - Index		Roll Off			ton	No
DISPOCC	OCC Rebate						No
ROREBATE	Roll Off Reb						No

UPDATE CHARGE CODE

Charge Code: DISPOCC ACTIVE: Yes

NAME: OCC Rebate TRANSLATE: 1

DOT DESCRIPTION: ENABLE NO CHARGE QUANTITY: No

LINE OF BUSINESS: Roll Off ENABLE NEGATIVE AMOUNT: No

EQUIPMENT TYPE: ENABLE MAX. WEIGHT CHARGE: Yes - Per Uni UOM: ton

MATERIAL TYPE: ESTIMATED AVERAGE WEIGHT:

RATE UOM: ton ENABLE MANUAL CHARGE: No

TAXABLE: No CLASS: ENABLE MINIMUM: No

GL ACCOUNT: Other Income ENABLE VENDOR: No

TEMPORARY SERVICE GL ACCOUNT: ENABLE EST. CHARGE QUANTITY: No

TYPE: Disposal PRICING MODEL: None

WEIGHT CHARGE: Yes BILL ZERO AMOUNT CHARGE: No

Accounts Payable Settings

IS AP TRANSACTION: No

RATE INDEX: OCC Index

THRESHOLD DIS. RATE: 0.00 ENABLE THRESHOLD: No

DEFAULT QUANTITY: 0.00

NavuNav Settings

HIDE IN NAVUNAV: No

REQUIRE COLLECTION TEST: No

PRINT LABEL: No

Fields Relevant to Rebate Setup

Field	Description
Is AP Transaction	For rebates where a payout is issued to the customer, set this field to 'Yes' to track the transaction as Accounts Payable on the designated GL account. Set to 'No' when no payout is issued.
Rate Index	Select the previously created rate index to associate with the charge code.

Add to Available Charge Code Setup

Pathway: Setup > Services > Available Charge Code

After the charge code has been created make it available for use from the Available Charge Code Setup screen. Additional information about using the Available Charge Code Setup screen can be reviewed here: [Available Charge Code Setup](#).

AVAILABLE CHARGE CODE SETUP				SETUP > SERVICES > AVAILABLE CHARGE CODE				
LINE OF BUSINESS	DIVISION	EQUIPMENT TYPE	MATERIAL TYPE					
Roll Off	HOUSTON	All	All	<input type="text" value="Search"/> <input type="button" value="Q"/> <input type="button" value="X"/> <input type="button" value="Refresh"/>				
CHARGE CODE ↑	MATERIAL TYPE	EQUIPMENT TYPE	AVAILABILITY	DIVISION DEFAULT RATE	UOM	NO CHARGE QUANTITY	MINIMUM TYPE	MINIMUM
Adjustment-Roll Off			Specific Service R...		each		None	
Disposal C&D			All Service Regions	\$ 0.00	ton	2.00	Quantity	1.00
Disposal Recycle			All Service Regions	\$ 0.00	ton		None	
Disposal Trash			All Service Regions	\$ 0.00	ton		None	
MSW Disposal	MSW		All Service Regions	\$ 0.00	ton		None	
Municipal Roll Off			All Service Regions	\$ 0.00	each		None	
OCC Disposal - Index			All Service Regions	\$ 0.00	ton		None	
OCC Rebate			All Service Regions	\$ 0.00	ton		None	
Roll Off After Hours			All Service Regions	\$ 0.00	each		None	
Roll Off Daily Rental			All Service Regions	\$ 0.00	each		None	
Roll Off Delivery			All Service Regions	\$ 0.00	each		None	
Roll Off Disposal Per Ton			All Service Regions	\$ 0.00	ton		None	
Roll Off Disposal Per Yard			All Service Regions	\$ 0.00	cubic yard		None	
Roll Off Dry Run			All Service Regions	\$ 0.00	each		None	
Service Regions								
SERVICE REGION ↑			SERVICE REGION DEFAULT RATE	NO CHARGE QUANTITY	MINIMUM TYPE	MINIMUM		
Charlie PEARLAND MUNICIPAL					None	<input type="checkbox"/>		
HOUSTON OPEN MARKET					None	<input type="checkbox"/>		
LOS TEXAS					None	<input type="checkbox"/>		

Add to Active Service

Pathway: [Customer Service Screen > Add Active Service](#) | [Customer Service Screen > Orders, Quotes and Contracts > Add Service](#)

Once a charge code has been created and its availability is set, it can be added as a charge to a active service for a site. Once added, it will appear as "Indexed" in the Charges section, where it can be selected and the rebate calculation defined.

Work Orders

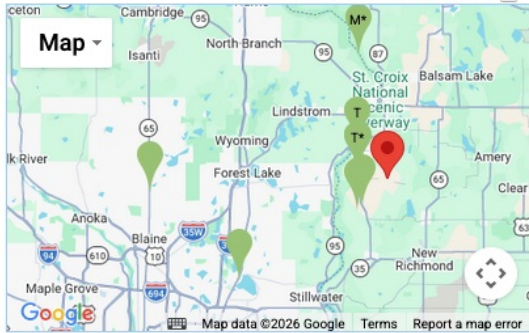
Rebates added to an active service are not automatically applied to a work order. When a work order is created and a rebate applies, it must be manually added to the work order. Once added, the system will use the calculations established for the service to determine the rebate amount, ensuring it reflects the current rate index and any defined pricing rules at the time of the transaction.

ADD SERVICE

SITE:

QTY: EQUIPMENT: SERVICE CODE: FREQUENCY: PER UNIT: SERVICE FEES: month MINIMUM PER:

DISPLAY ALL LINES OF BUSINESS

Map 

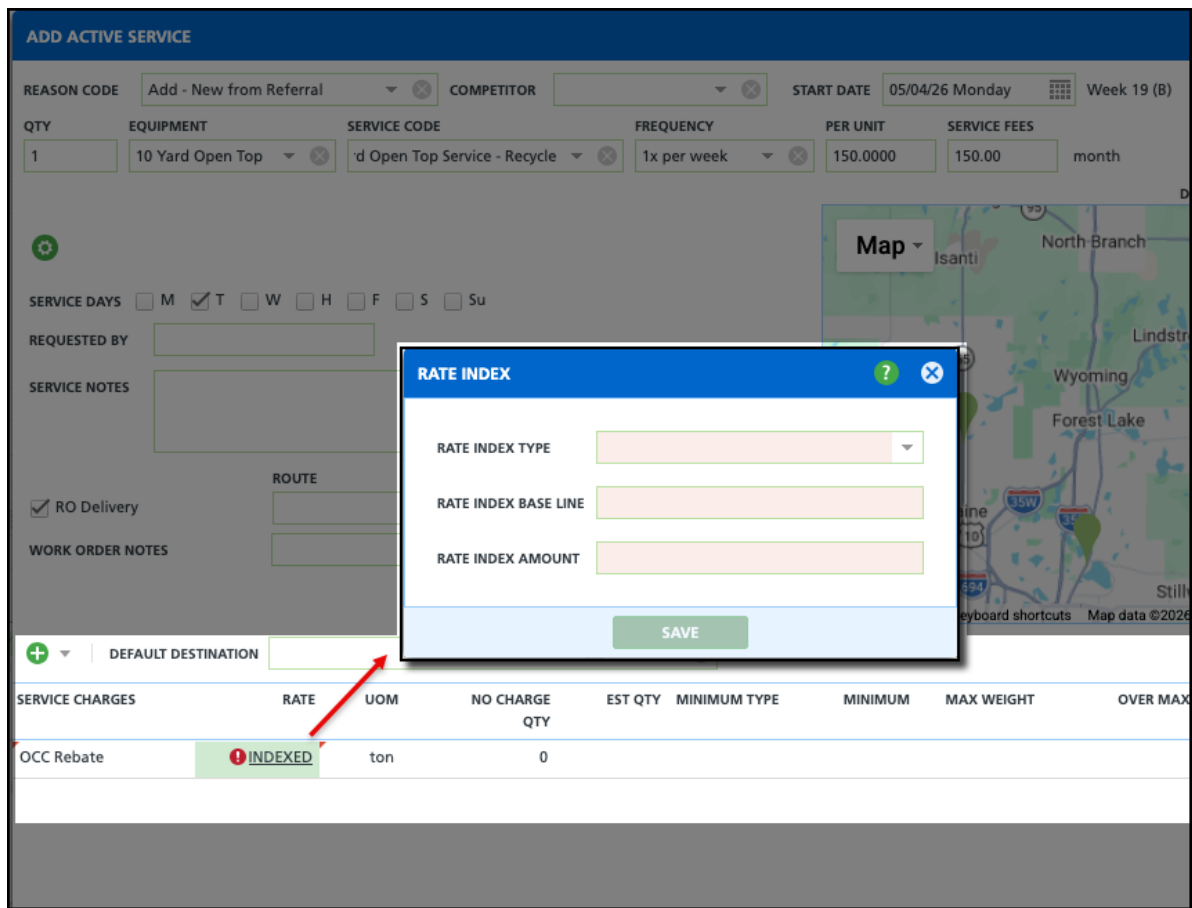
SERVICE DAYS: M T W H F S Su

DEFAULT DESTINATION:

SERV...	RATE	UOM	NO CHARGE QTY	EST QTY	MINIMUM TYPE	MINIMUM	MAX WEIGHT	OVER MAX WEIGHT RATE	WORK TYPES
OC...	INDEXED	ton	0		None				2

SAVE

INDEXED Rate Settings



Field Descriptions

Field	Description
Rate Index Type	Determines how the rebate is calculated. Select Percentage to apply a percent-based rebate, or Amount to apply a fixed value per unit.
Rate Index Base Line	Defines the base value the rebate is applied against.
Rate Index Amount	The rebate value to apply based on the selected type. This is either the percentage or fixed amount used in the calculation.

Rate Setup

Rebates can be established on a service in two ways: either as a percentage, or as a flat amount.

Percentage Setup

Percentage-based rebates can be configured in two ways: as a straight percentage of the full index value, or as a percentage applied to the remaining index value after a baseline amount has been deducted.

Straight Percentage

With this option, the rebate is a straight percentage of the full index value.

- **Rate Index Type:** Percentage
- **Rate Index Base Line:** (Leave blank or 0)
- **Rate Index Amount:** Enter the percentage (e.g., 15)

Result:

$$\text{Rebate} = \text{Index} \times \%$$

Example: \$100/ton x 15% = \$15/ton

Percentage of Index After Baseline

With this option, a baseline is removed first, then a percentage is applied to the remainder.

- **Rate Index Type:** Percentage
- **Rate Index Base Line:** Enter baseline (e.g., 20)
- **Rate Index Amount:** Enter % (e.g., 15)

Result

Rebate = (Index - baseline) x %

Example: (\$100/ton - \$20) x 15% = \$12/ton

Flat Amount Setup

With this setup option, a fixed amount is removed from the index and no other calculations are applied.

- **Rate Index Type:** Amount
- **Rate Index Base Line:** (enter '0')
- **Rate Index Amount:** Enter the amount to remove (e.g., 20)

Result:

Rebate = Index - Flat Amount

Example: \$100/ton - \$20 = \$80/ton

NOTES

Work Order Charge

* Rate index can not be modified

* They would need to make a change to the service if the index
