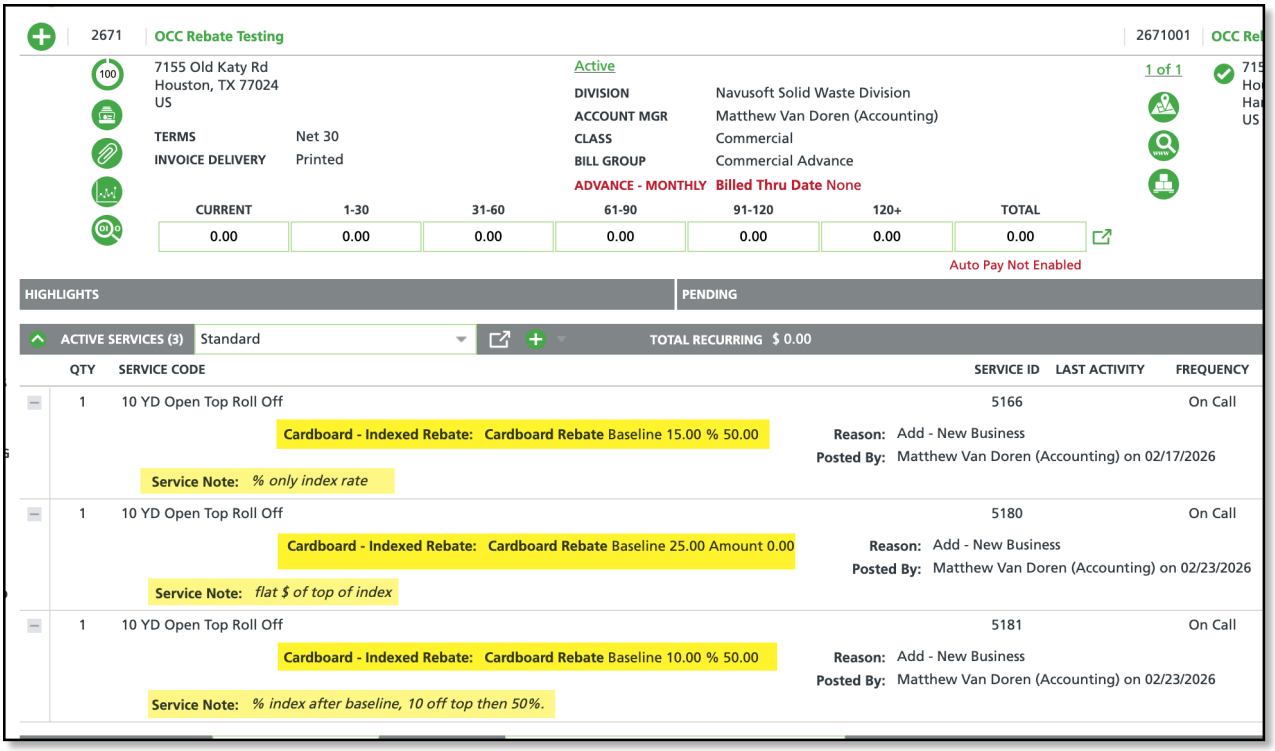
Rebates

Last Modified on 06/30/2026 2:52 pm PDT

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.



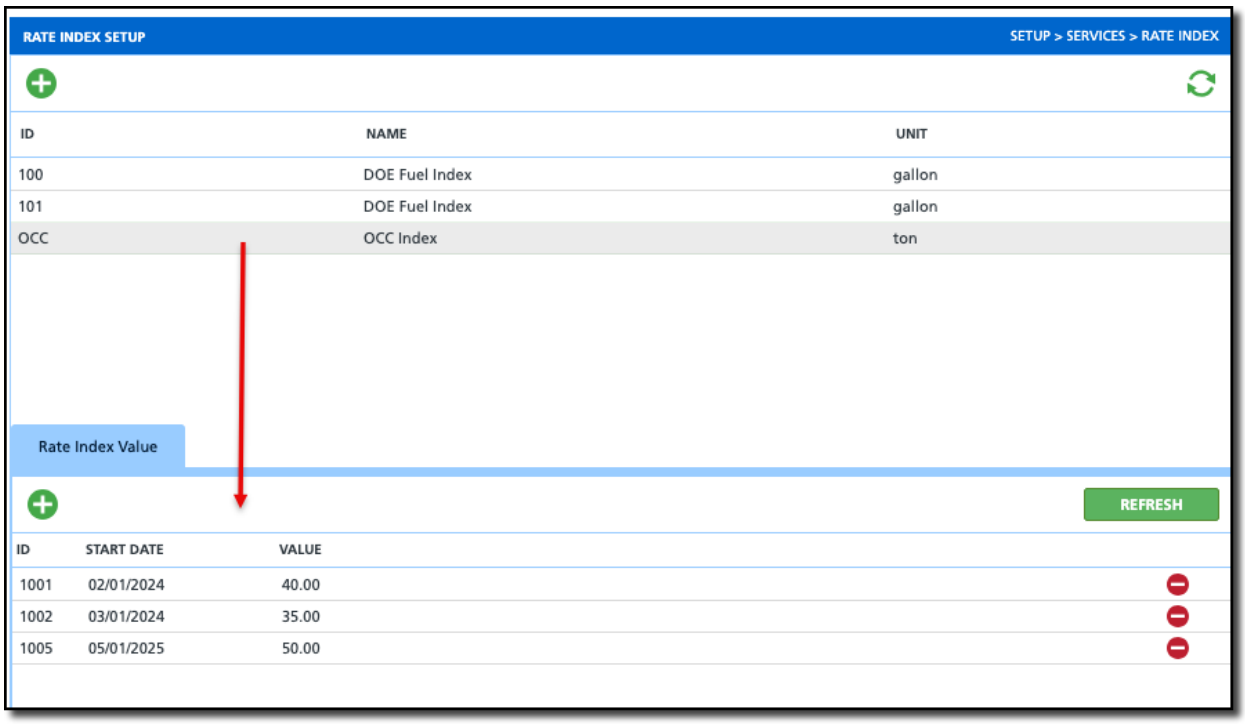
Setup Requirements

Rate Index

Pathway: *Setup > Services > Rate Index*

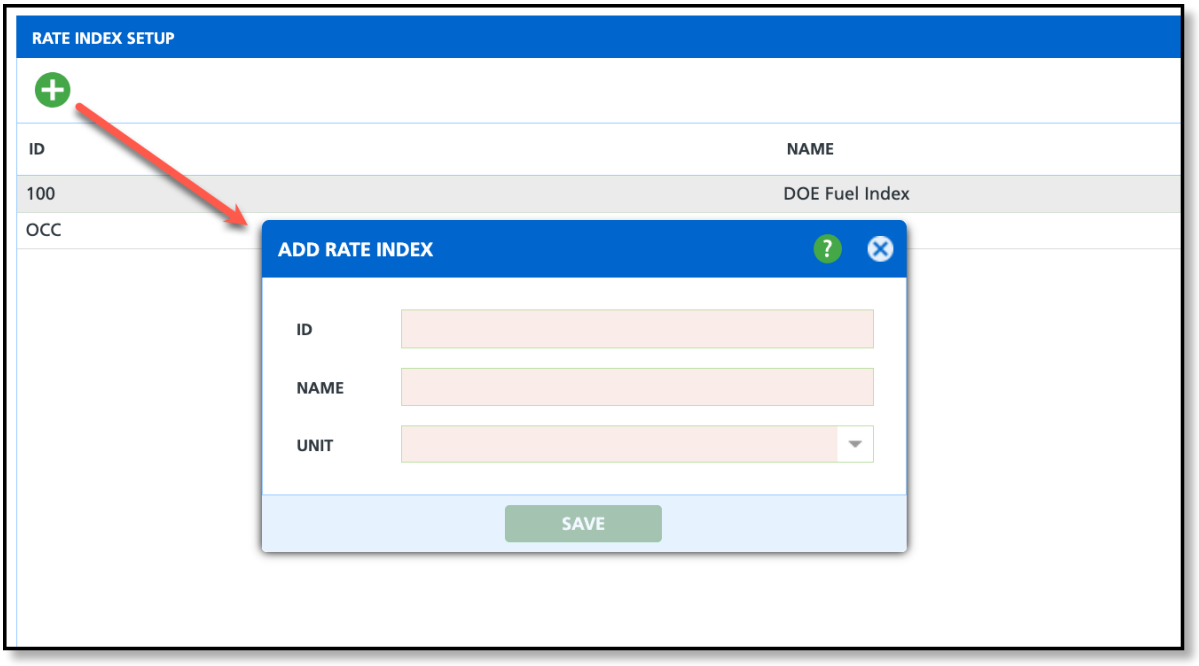
Rebates are tied directly to rate index configurations, which is why the Rate Index plays a key role in how they are calculated in the system. While rebates are applied separately from billing, they rely on the underlying rate structure to ensure accuracy over time. This article covers how Rate Index 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.



Add a New Rate Index

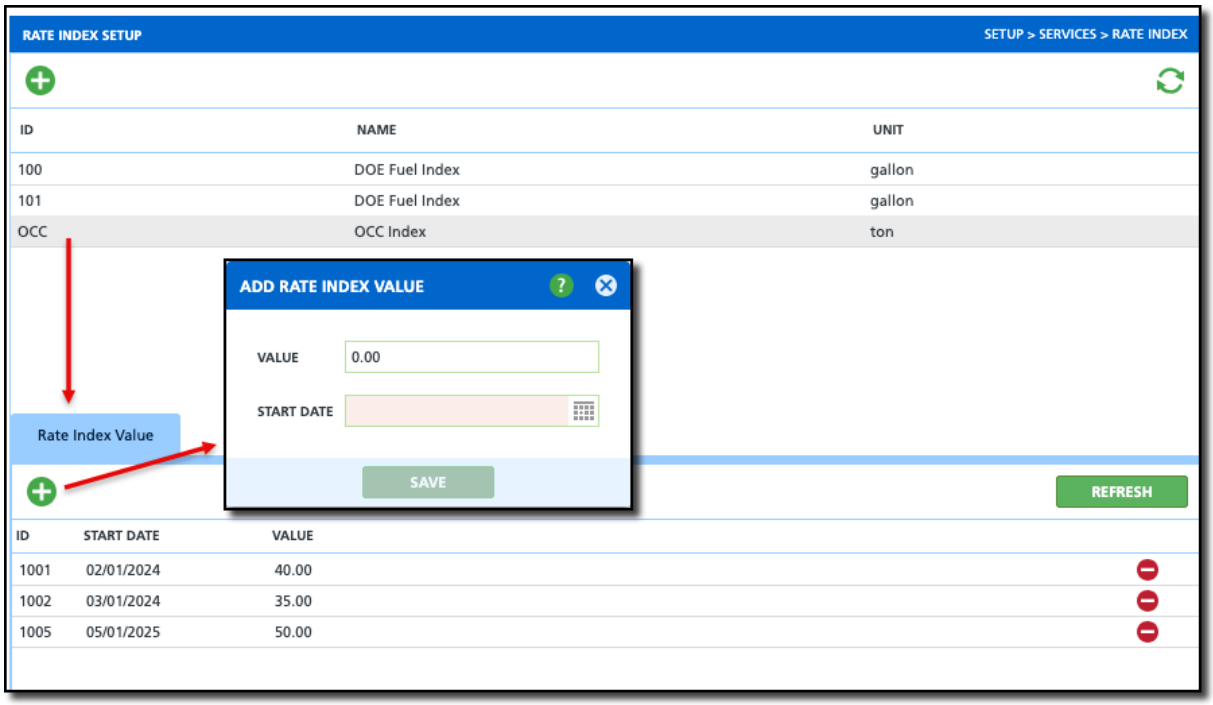
To add a new Rate Index, click the green Add icon to open the Add Rate Index window. A new rate index does not need to be created each time rates change; instead, rate changes are recorded as new rate index values.



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

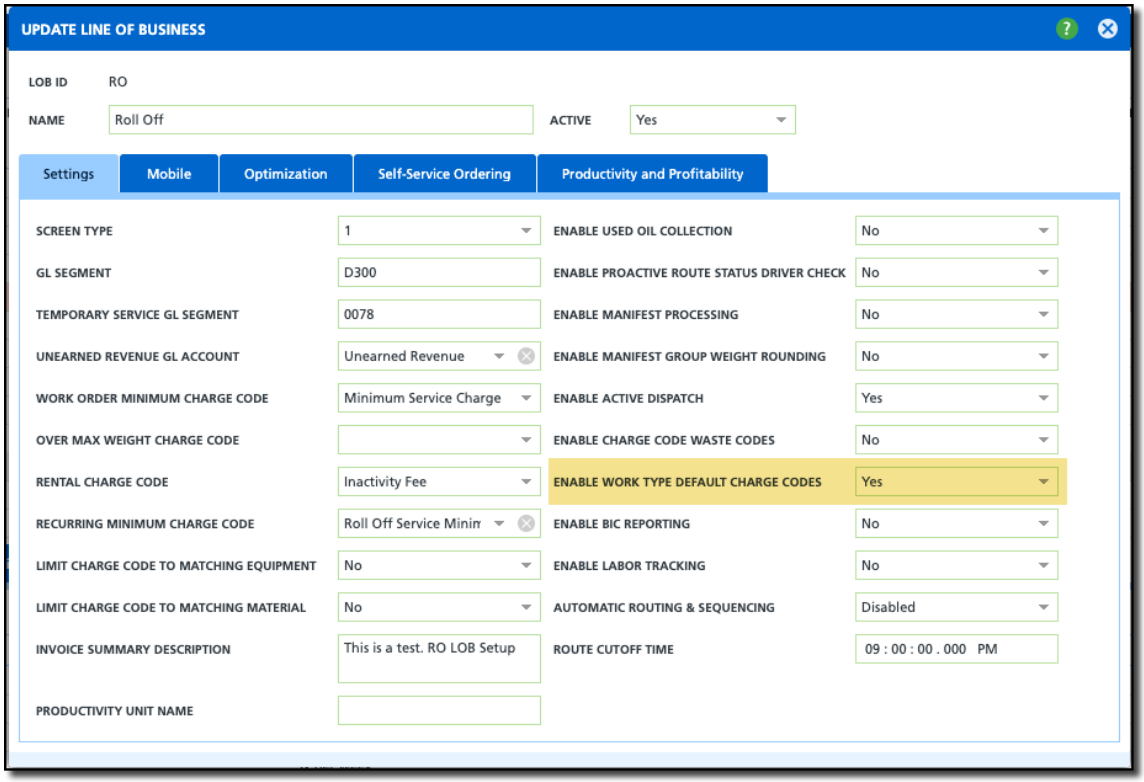
After reviewing the current monthly rates for rebate-eligible commodities using external resources, navigate to **Rate Index** and add a new rate index value to reflect the updated rates for that month. **Do not modify an existing value**. Instead, enter a new value along with its effective start date.



Line of Business

Pathway: *Setup > Services > Line of Business*

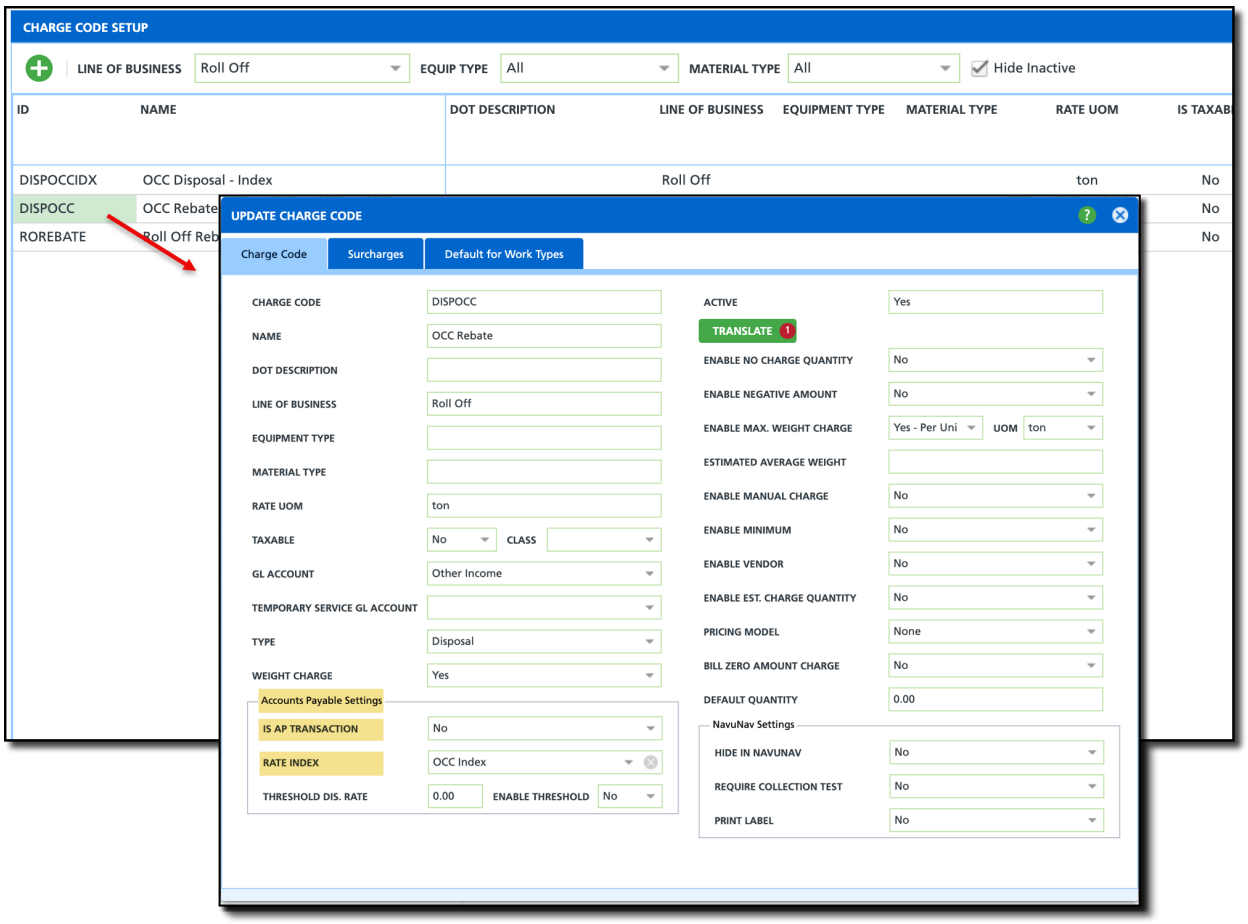
Set the *'Enable Work Type Default Charge Codes'* for each line of business that rebates are enabled.



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.



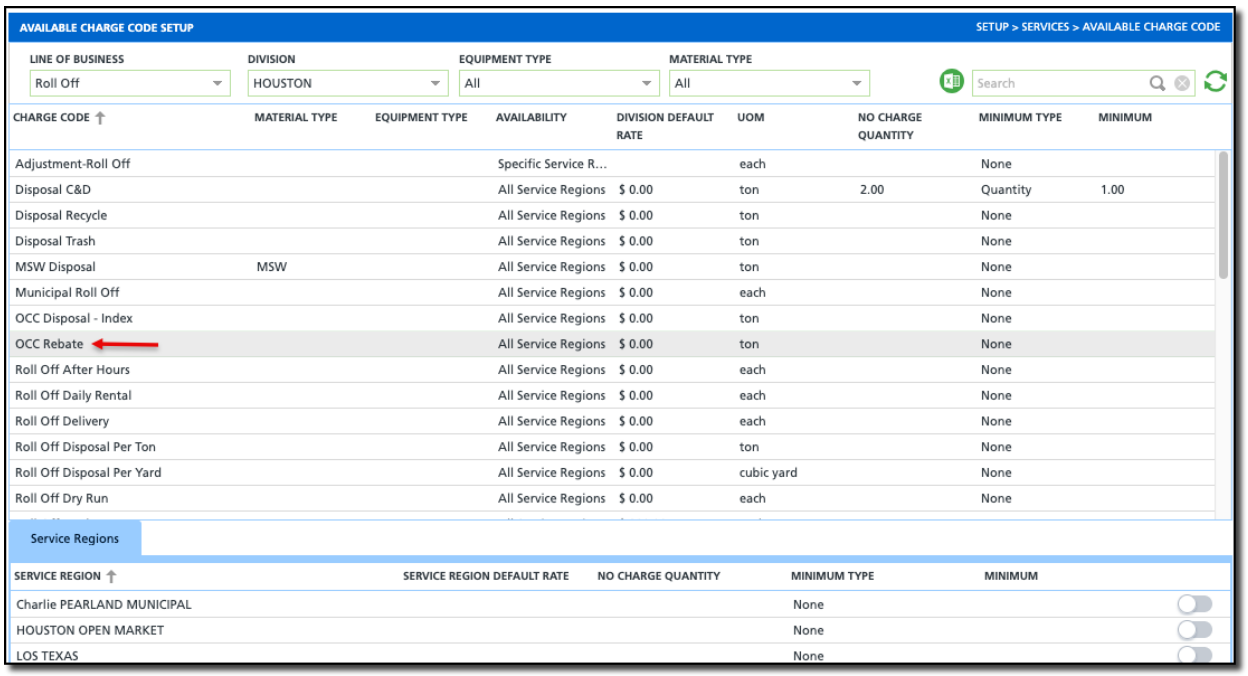
Fields Relevant to Rebate Setup

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.



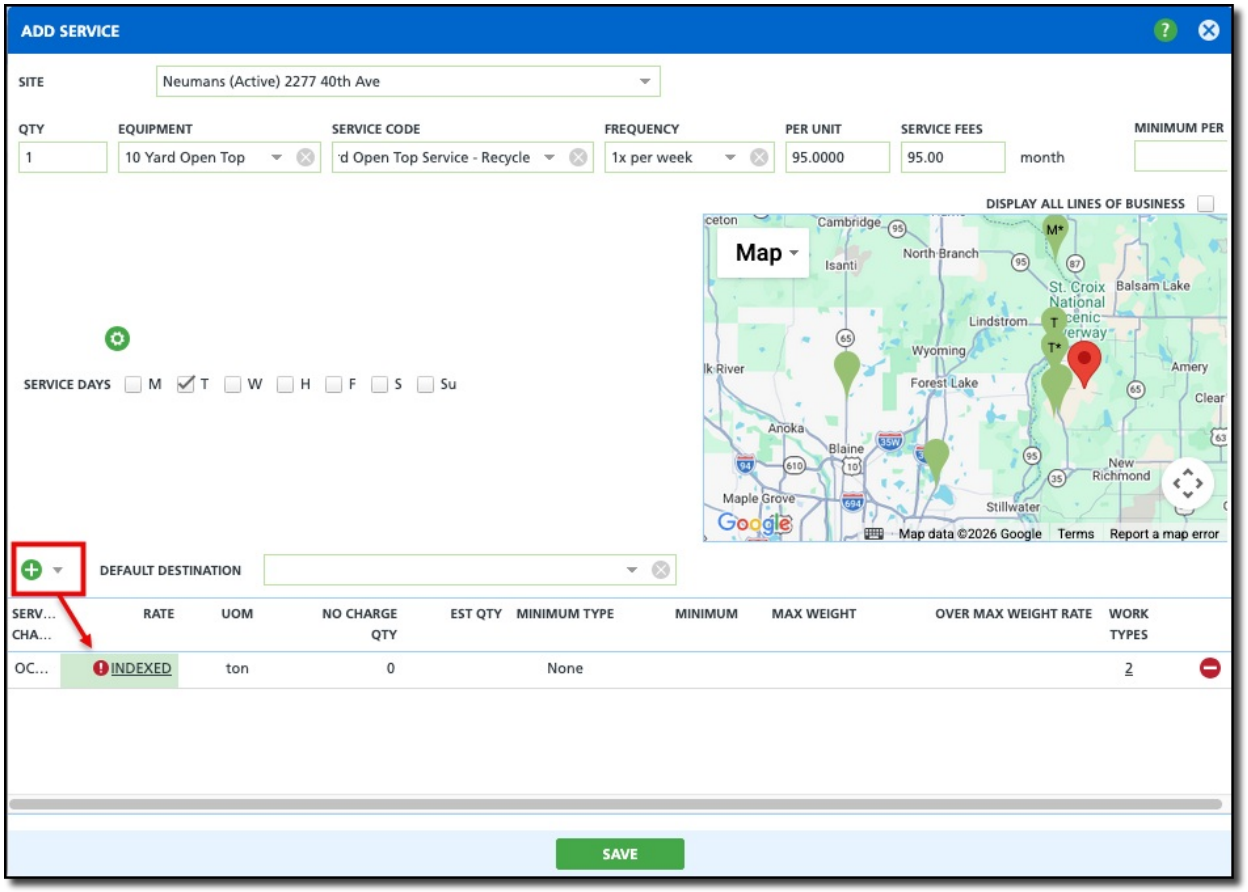
Add to Active Service

Pathway: *Customer Service Screen > Add Active Service | Customer Service Screen > Orders, Quotes and Contracts > Add Service*

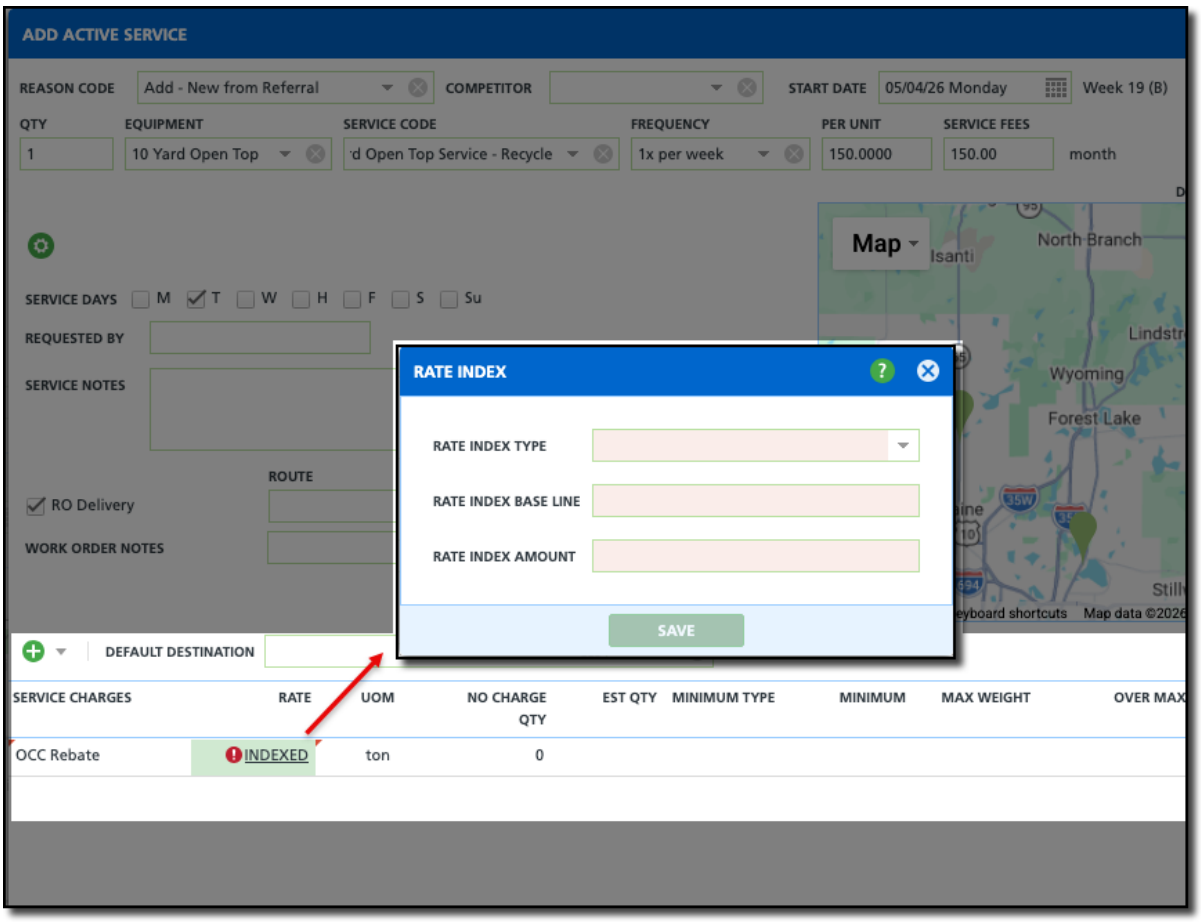
Once a charge code has been created and its availability is set, it can be added as a charge to a active service for a site. Once added, it will appear as “Indexed” in the Charges section, where it can be selected and the rebate calculation defined.

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.



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:
Rebate = Index x %
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

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