

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.

2671 OCC Rebate Testing | 2671001 | OCC Re

7155 Old Katy Rd
Houston, TX 77024
US

TERMS: Net 30
INVOICE DELIVERY: Printed

DIVISION: Navusoft Solid Waste Division
ACCOUNT MGR: Matthew Van Doren (Accounting)
CLASS: Commercial
BILL GROUP: Commercial Advance

ADVANCE - MONTHLY Billed Thru Date None

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
0.00	0.00	0.00	0.00	0.00	0.00	0.00

Auto Pay Not Enabled

HIGHLIGHTS | PENDING

ACTIVE SERVICES (3) Standard | TOTAL RECURRING \$ 0.00

QTY	SERVICE CODE	SERVICE ID	LAST ACTIVITY	FREQUENCY
1	10 YD Open Top Roll Off	5166		On Call
Cardboard - Indexed Rebate: Cardboard Rebate Baseline 15.00 % 50.00		Reason: Add - New Business		
Service Note: % only index rate		Posted By: Matthew Van Doren (Accounting) on 02/17/2026		
1	10 YD Open Top Roll Off	5180		On Call
Cardboard - Indexed Rebate: Cardboard Rebate Baseline 25.00 Amount 0.00		Reason: Add - New Business		
Service Note: flat \$ of top of index		Posted By: Matthew Van Doren (Accounting) on 02/23/2026		
1	10 YD Open Top Roll Off	5181		On Call
Cardboard - Indexed Rebate: Cardboard Rebate Baseline 10.00 % 50.00		Reason: Add - New Business		
Service Note: % index after baseline, 10 off top then 50%.		Posted By: Matthew Van Doren (Accounting) on 02/23/2026		

Setup Requirements

Rate Index

Pathway: Setup > Services > Rate Index

Rebates are tied directly to the rates used to calculate charges, which is why the Rate Index plays a key role in how they are supported 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 shows the 'RATE INDEX SETUP' interface. At the top, there is a breadcrumb trail: 'SETUP > SERVICES > RATE INDEX'. Below this is a table with columns 'ID', 'NAME', and 'UNIT'. The table contains three rows: ID 100 (DOE Fuel Index, gallon), ID 101 (DOE Fuel Index, gallon), and ID OCC (OCC Index, ton). A red arrow points from the 'OCC' row to a modal window titled 'ADD RATE INDEX VALUE'. The modal window has a 'VALUE' field with '0.00' and a 'START DATE' field with a calendar icon. Below the modal is a 'SAVE' button. To the right of the modal is a 'REFRESH' button. Below the modal is a table with columns 'ID', 'START DATE', and 'VALUE'. This table contains three rows: ID 1001 (02/01/2024, 40.00), ID 1002 (03/01/2024, 35.00), and ID 1005 (05/01/2025, 50.00). A red arrow points from the 'Rate Index Value' button to the 'ADD RATE INDEX VALUE' modal.

Charge Code

Pathway: Setup > Services > Charge Code

Rate indexes are added to a 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.

The screenshot shows the 'CHARGE CODE SETUP' interface. At the top, there is a breadcrumb trail: 'SETUP > SERVICES > CHARGE CODE'. Below this is a table with columns 'ID', 'NAME', 'DOT DESCRIPTION', 'LINE OF BUSINESS', 'EQUIPMENT TYPE', 'MATERIAL TYPE', 'RATE UOM', 'IS TAXABLE', and 'TAX'. The table contains three rows: ID OCC_Rebate (OCC Rebate, No), ID ROREBATE (Roll Off Rebate, No), and ID ROREBATE (Roll Off Rebate, No). A red arrow points from the 'OCC_Rebate' row to a modal window titled 'UPDATE CHARGE CODE'. The modal window has tabs for 'Charge Code', 'Surcharges', and 'Default for Work Types'. The 'Charge Code' tab is selected. The modal window has various fields for 'CHARGE CODE', 'NAME', 'DOT DESCRIPTION', 'LINE OF BUSINESS', 'EQUIPMENT TYPE', 'MATERIAL TYPE', 'RATE UOM', 'TAXABLE', 'GL ACCOUNT', 'TEMPORARY SERVICE GL ACCOUNT', 'TYPE', 'WEIGHT CHARGE', 'IS AP TRANSACTION', 'RATE INDEX', 'THRESHOLD DIS. RATE', 'ENABLE THRESHOLD', 'ACTIVE', 'ENABLE NO CHARGE QUANTITY', 'ENABLE NEGATIVE AMOUNT', 'ENABLE MAX. WEIGHT CHARGE', 'ESTIMATED AVERAGE WEIGHT', 'ENABLE MANUAL CHARGE', 'ENABLE MINIMUM', 'ENABLE VENDOR', 'ENABLE EST. CHARGE QUANTITY', 'PRICING MODEL', 'BILL ZERO AMOUNT CHARGE', 'DEFAULT QUANTITY', 'HIDE IN NAVUNAV', 'REQUIRE COLLECTION TEST', and 'PRINT LABEL'. A red box highlights the 'RATE INDEX' field, which is set to 'OCC Index'. A red arrow points from the 'RATE INDEX' field to the 'OCC Index' dropdown menu.

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	Search				
Roll Off	HOUSTON	All	All					
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 Service

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

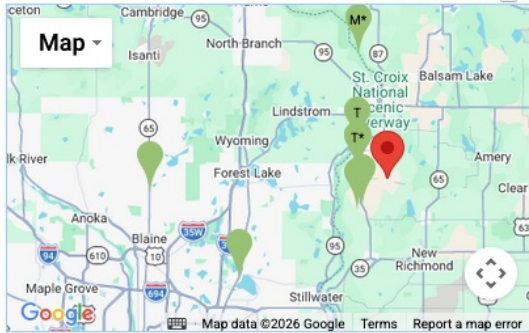
Once a charge code has been created and its availability is set, it can be added as a charge to a new service at a site. It will appear as "Indexed" on the screen, where it can be selected and the rebate calculation defined.

ADD SERVICE

SITE:

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

DISPLAY ALL LINES OF BUSINESS

Map 

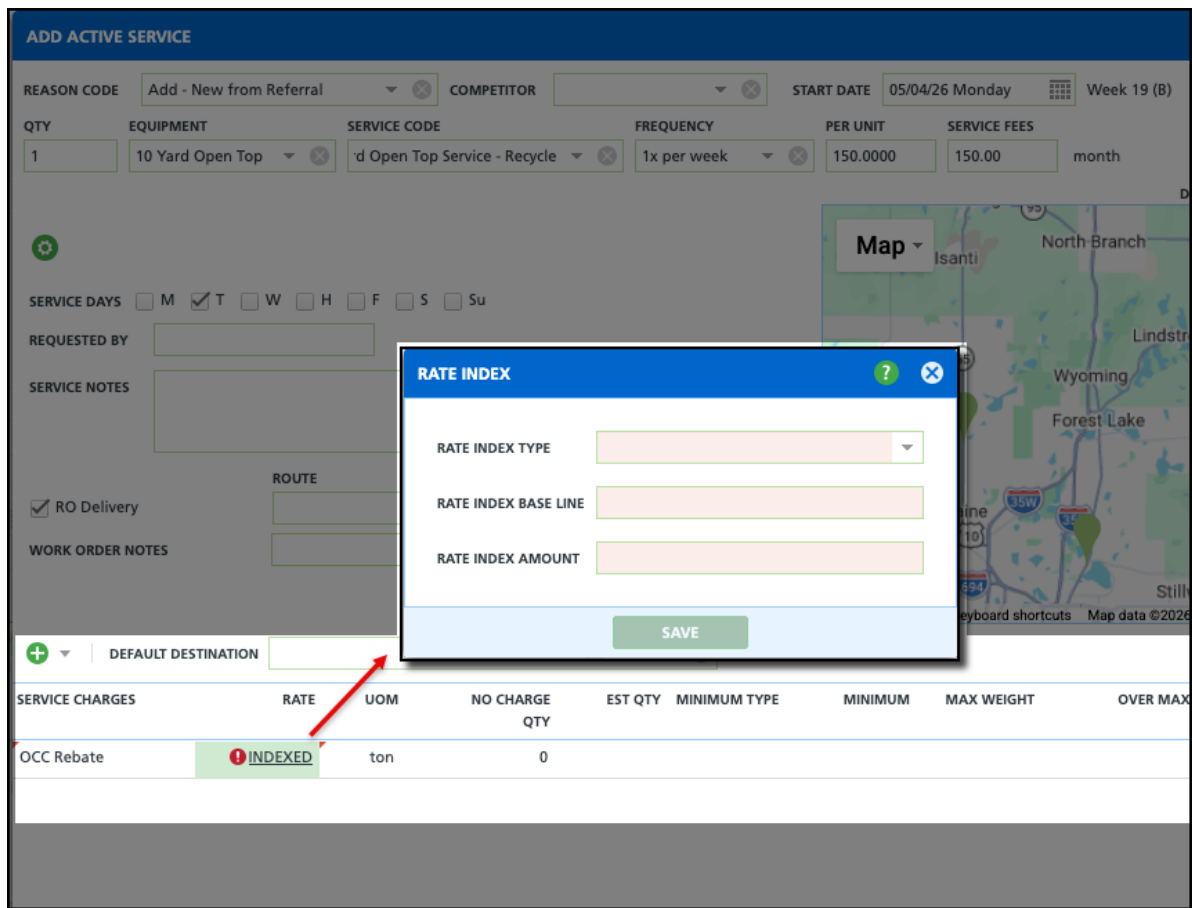
SERVICE DAYS: M T W H F S Su

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.

Application of Use

Rebates can be established on a service in three ways: **Percentage**, **Flat Amount off Top of Index**, and **Percentage of Index After Baseline**.

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

Flat Amount off Top of Index

With this option, a fixed amount is removed from the index before applying the rebate logic.

- **Rate Index Type:** Amount
- **Rate Index Base Line:** Enter the amount to remove (e.g., 20)
- **Rate Index Amount:** (Not used or 0, depending on system requirement)

Result:

Rebate = Index - Flat Amount

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

NOTES

Work Order Charge

* Rate index can not be modified

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