

Profit-driven rebate management

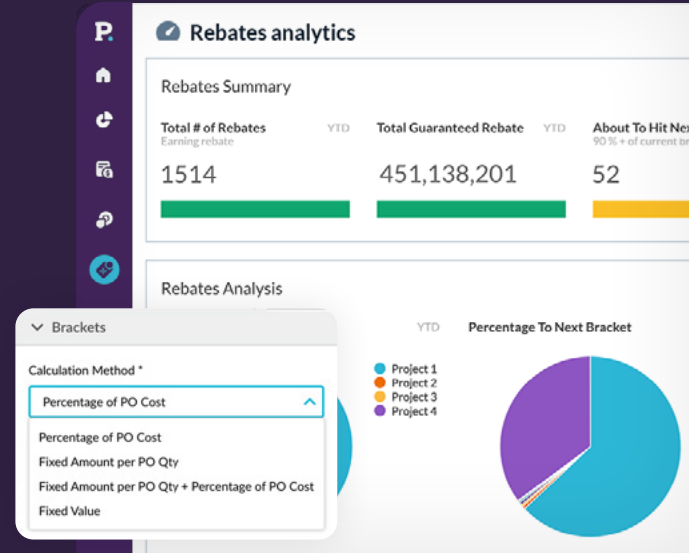
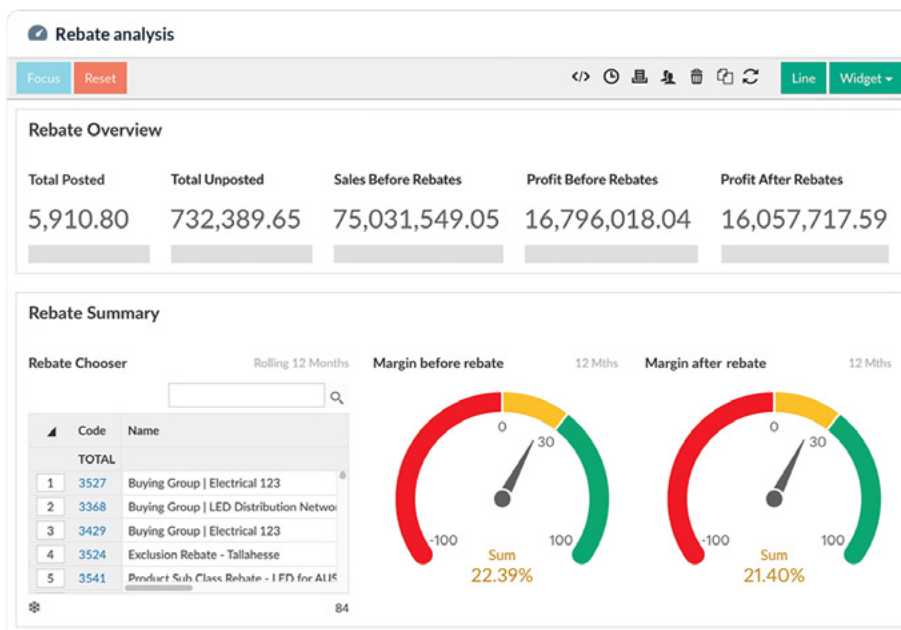
Replace manual spreadsheets with accurate, automated calculations and simplified tracking. Gain full visibility and the ability to capture every dollar.

Manage multiple payable & receivable programs

Phocas Rebates is a self-serve tool designed to replace manual, error-prone processes. It automates rebate calculations, simplifies tracking, and centralizes all rebate data in one accessible platform. With instant visibility into payable and receivable programs, you can analyze true product margins, proactively hit rebate targets, and improve profitability across customers, suppliers and products.

Sales, purchasing and finance teams can independently access up-to-date rebate insights, while custom dashboards and alerts help uncover new earning opportunities before periods close. Rapid implementation and seamless integrations with multiple ERPs and data sources delivers fast ROI.

Whether you're managing tiered, growth, retrospective or multi-bracket programs, Phocas Rebates makes it easy to stay on top of every rebate agreement – helping your team make smarter, margin-boosting decisions.



A perfect fit for mid-market distribution, manufacturing and retail businesses

Data-driven: Rebates are auto updated with live data, ensuring accuracy and access anywhere, anytime

Hit targets: Use near-miss analysis to see exactly how close rebate targets are, adjust purchasing decisions before periods close

Self-serve: An easy-to-use tool that empowers more people to track and analyze rebates

ERP compatible: Fast integration – automatically pulls ERP data + any source into one platform

“Our world before Phocas Rebates was spreadsheets and manually tracking rebates by vendor. We’re a very high margin, wholesale distributor. Our profitability is attributed largely to rebates.”

Director of FP&A
North Eastern Supply

Maximize margins, incentivize sales

Without clear visibility, it's easy to miss rebate targets, misjudge margins, and leave money on the table.

- ✓ **360° view:** Get a clear view of performance - see which products and vendors drive the most rebates
- ✓ **Analyze:** Compare profit margins by customer, branch, product, supplier – before and after rebates
- ✓ **Capitalize:** Track target accruals and explore 'what if' scenarios to uncover new earning opportunities
- ✓ **Margin control:** See true product costs after rebates to improve pricing and purchasing decisions

Self-serve rebate tracking

If you're managing rebates without proper analysis, how do you know if you're maximizing their full potential?

- ✓ **Track:** Regularly review rebate structures, assess sales impact, and monitor profit and margin – in one place
- ✓ **Drill-down:** Analyze data by vendor, product line, or branch to spot risks such as product margin erosion
- ✓ **Automate:** Create custom reports and dashboards in minutes, and set up alerts so you don't miss anything



One of our reps was using Phocas in real time in front of a customer. They saw immediately that he was just below another rebate break band, so he straight away upped his order by £2,000 to take him into that next rebate level. We wouldn't have had that instant win without easy access to rebate data in Phocas."

*Paul Whittaker, IT Manager
Ring Automotive*

Phocas goes beyond Rebates

Explore a platform of products that work smoothly together - helping your business connect, understand and plan better.



Analytics



Financial
Statements



Budgets &
Forecasts



Rebates



CRM



Scan to get your Phocas Rebates demo

Quick to implement, easy to use and built to boost profitability. Track, analyze and capture every rebate dollar – with real-time data and ERP-connected visibility.

Learn more at www.phocassoftware.com/platform/rebates

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