

## Setup Requirements

### Rebate Program Setup

From the Setups module, open the Rebates Program Setup table.

Click the **Add** icon.

The **Rebate Program ID** will automatically populate as 0. It will update to the next available program number when the record is saved.

In the **Name** field, enter a name for the new rebate program.

In the **Description** field, enter a meaningful description of the new rebate program.

Enter the **Program Start Date** and **Program End Date** if there is a definitive start and/or end date. If these fields are empty, the system will interpret this as an ongoing program.

Select the **Service Type** to which the new rebate program applies.

Select the **Statistics Code** that will be associated to track the rebate dollars. If no stat code is present, create one before completing the rebates setup.

The Rebate Program Setup table creates and maintains the rebate programs the utility offers its customers. The setup table defines the program name and the individual configurations.

*Setups > Rebates > Rebate Program Setup*

Rebate Program Maintenance (BROWSE)

4 of 4

OK Cancel ? Just-like

Rebate Program Maintenance

Rebate Program ID: 1

Name: TREE REBATE

Description: SHADE TREE REBATE

Program Start Date: Program End Date:

Service Type: P COMMITMENT TO COMM

Statistics Code: P-TREE ELEC TREE POWER

Default Rebate Amount: Amount is Overrideable:

Maximum Rebate Amount:

Rebate Claim Scope:

Maximum claims: Max Claims is Overrideable:

Service Date Restriction: Service date is 0 not applicable Date:

Ready

At **Default Rebate Amount**, enter the amount that will appear each time a new account is enrolled in the program.

Check the **Amount is Overrideable** box if the Default Rebate Amount should be adjustable when enrolling a new account.

Enter the **Maximum Rebate Amount** to specify the maximum amount the rebate program may apply to an account.

Select the **Rebate Claim Scope** from the dropdown menu.

- 1 Not Applicable
- 2 Per Premise
- 3 Per Account
- 4 Per Customer
- 5 Per Unit at a Premise

If the rebate program has a maximum number of claims per account, enter that number at **Maximum Claims** field.

Check **Max Claims is Overrideable** if the maximum number of claim allowed should be adjustable at the account level.

Rebate Program Maintenance (BROWSE)

4 of 4

OK Cancel ? Just-like

Rebate Program Maintenance

Rebate Program ID: 1

Name: TREE REBATE

Description: SHADE TREE REBATE

Program Start Date: [calendar icon] Program End Date: [calendar icon]

Service Type: P (dropdown) COMMITMENT TO COMM

Statistics Code: P-TREE (dropdown) ELEC TREE POWER

Default Rebate Amount: 50.00 Amount is Overrideable:

Maximum Rebate Amount: 150.00

Rebate Claim Scope: 3 (dropdown) Per Account

Maximum claims: [empty] Max Claims is Overrideable:

Service Date Restriction: Service date is 0 (dropdown) not applicable Date: [calendar icon]

Ready

Use the **Service Date Restriction** field to specify a minimum restriction date before an account is eligible for the program.

Set the **Service date is** field using the dropdown menu.

- 0 Not Applicable
- 1 Before
- 2 After
- 3 Equal to
- 4 Before or Equal to
- 5 Equal to or After

Set the **Date** using the dropdown calendar.

Rebate Program Maintenance (BROWSE)

4 of 4

OK Cancel ? Just-like

Rebate Program Maintenance

Rebate Program ID: 1

Name: TREE REBATE

Description: SHADE TREE REBATE

Program Start Date: [calendar icon] Program End Date: [calendar icon]

Service Type: P [dropdown] COMMITMENT TO COMM

Statistics Code: P-TREE [dropdown] ELEC TREE POWER

Default Rebate Amount: 50.00 Amount is Overrideable:

Maximum Rebate Amount: 150.00

Rebate Claim Scope: 3 [dropdown] Per Account

Maximum claims: [calendar icon] Max Claims is Overrideable:

Service Date Restriction: Service date is 0 [dropdown] not applicable Date: [calendar icon]

Ready

Click **OK** to save the rebate program record.

*Note: The Rebate Program ID updated to the next available number.*

**Rebate Program Maintenance (BROWSE)**

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**Rebate Program Maintenance**

**Rebate Program ID:** 1

**Name:** TREE REBATE

**Description:** SHADE TREE REBATE

**Program Start Date:** [ ] **Program End Date:** [ ]

**Service Type:** P [ ] COMMITMENT TO COMM

**Statistics Code:** P-TREE [ ] ELEC TREE POWER

**Default Rebate Amount:** 50.00 **Amount is Overrideable:**

**Maximum Rebate Amount:** 150.00

**Rebate Claim Scope:** 3 [ ] Per Account

**Maximum claims:** [ ] **Max Claims is Overrideable:**

**Service Date Restriction:** Service date is 0 [ ] not applicable **Date:** [ ]

Ready

## Bill Print Setup

After creating the rebate, make sure the rebate is setup in the Billing Print Setup table.

From the Journals module, open the Bill Print Setup table to review the current details.

Select the Bill Print Number the rebates should be applied. This will likely be Bill Number 38.

If the rebate program(s) are not present, add the rebate program or submit a WSC ticket for assistance.

*Journals > Billing and Adjustments > Billing Print Setup*

The screenshot displays the 'Billing Print Setup (BROWSE)' window. The top section, 'Bill Print Group', contains the following fields: 'Bill number' (38), 'Section' (17 Electric Rebates), 'Summarize' (Y), 'Subtotal' (checkbox), and 'Zero suppress' (checkbox checked). The bottom section, 'Detail (BROWSE)', contains: 'Order' (1), 'Statistic code' (P-TREE), 'Description' (ELEC TREE POWER), 'Zero suppress' (checkbox checked), and 'Flags' (1, 2, 3, 4 checkboxes). The status bar at the bottom indicates 'Ready' and provides instructions: 'Use the navigation buttons to browse records'.

## Understanding the Customer Rebates Table

The Rebates table consists of two (2) windows.

The **Rebates** window (top) displays current active rebate programs attached to the account.

The **Rebate History** section (bottom) maintains records that detail the application and revocation of the rebates associate with the account.

Account Gateway > Other Billing Items > Rebates

Customer Rebate (BROWSE)

Rebate Id	Rebate Policy ID	Name	Service	Amount
56	1	TREE REBATE	P	50.00

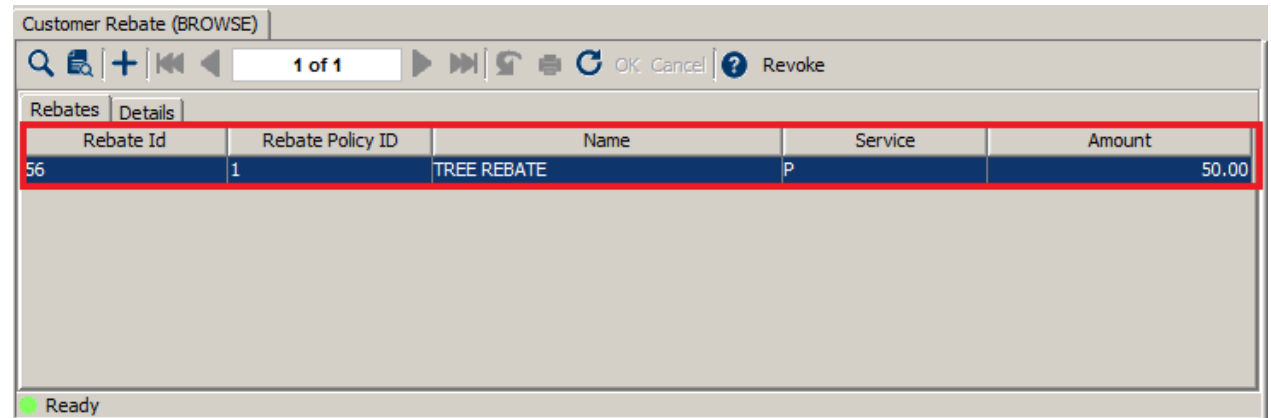
Ready

Rebate History (BROWSE)

Rebate Id	Rebate Polic...	Date	Amount	Revoked Re...	Customer	Created By
56	1	2017-08-25 ...	50.00	Apply	5600	dkarls

### Current Active Rebates

- **Rebate ID** – ID assigned when the rebate is applied
- **Rebate Policy ID** – ID assigned to the program when it is created in the setups table
- **Name** – Full name of the rebate program
- **Service** – Service affected by the rebate
- **Amount** – Amount of the rebate claim



The screenshot shows a software window titled "Customer Rebate (BROWSE)". At the top, there is a search bar and navigation controls, including a "1 of 1" indicator. Below this is a table with two tabs: "Rebates" and "Details". The "Rebates" tab is active, displaying a table with the following data:

Rebate Id	Rebate Policy ID	Name	Service	Amount
56	1	TREE REBATE	P	50.00

The table is highlighted with a red border. At the bottom of the window, there is a status bar that says "Ready".

### Current Active Rebates Details

- **Rebate ID** – ID assigned when the rebate is applied
- **Rebate Policy** – Program ID assigned when creating the rebate. This includes the service type, rebate name, and rebate description)
- **Quantity** – Number of claims for the rebate on the account
- **Max Allowed** – Maximum claims allowed for the rebate on the account
- **Amount** – Current rebate amount
- **Max Amount** – specifies the maximum amount of a claim for the rebate in question

The screenshot shows a software window titled "Customer Rebate (BROWSE)". The window has a toolbar with icons for search, add, navigation, and actions like OK, Cancel, and Revoke. Below the toolbar, there are tabs for "Rebates" and "Details", with "Details" selected. The main area is titled "Rebate Details" and contains the following fields:

Rebate Id:	56			
Rebate Policy:	1	P	TREE REBATE	SHADE TREE REBATE
Quantity:	1		Max allowed:	Per Account
Amount:	50.00		Max amount:	150.00

At the bottom left of the window, there is a green status indicator and the text "Ready".