

# DEALER REBATE – USER MANUAL

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# 1. Define Parameters for Dealer Rebate – SAMS

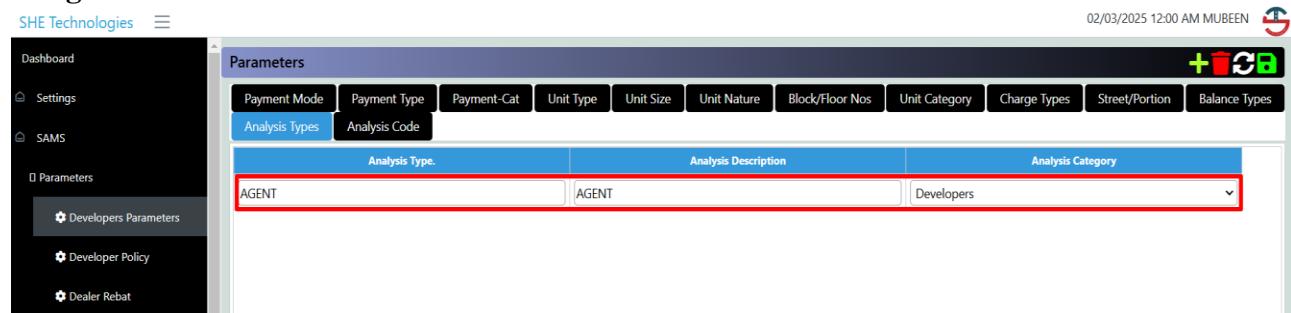
## Step 1.1: [Define General Parameters]

Instructions:

**Go to SAMS → Parameters → Developers Parameters → Analysis Type**

Set Analysis Type as Shown in Image and Save it.

Image:



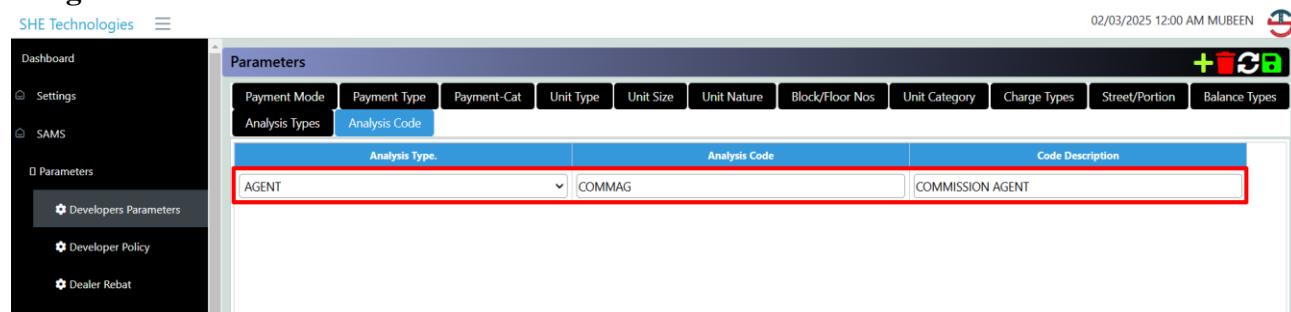
Analysis Type.	Analysis Description	Analysis Category
AGENT	AGENT	Developers

Instructions:

**Go to SAMS → Parameters → Developers Parameters → Analysis Code**

Set Analysis Code as Shown in Image and Save it.

Image:



Analysis Type.	Analysis Code	Code Description
AGENT	COMMAG	COMMISSION AGENT

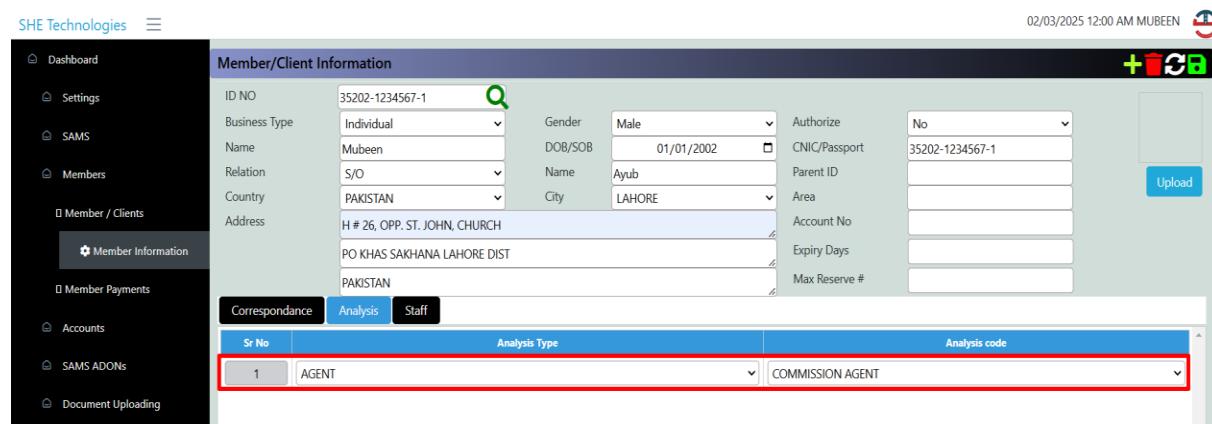
## Step 1.2: [Define Dealer in Members]

Instructions:

**Go to Members → Member / Clients → Member Information**

Define dealer's CNIC and set the Analysis in Analysis Tab as shown in Image below and Save.

Image:



Sr No	Analysis Type	Analysis code
1	AGENT	COMMISSION AGENT

## 2. Dealer Criteria and Member Registration

### Step 2.1: [Set Dealer's Criteria]

Instructions:

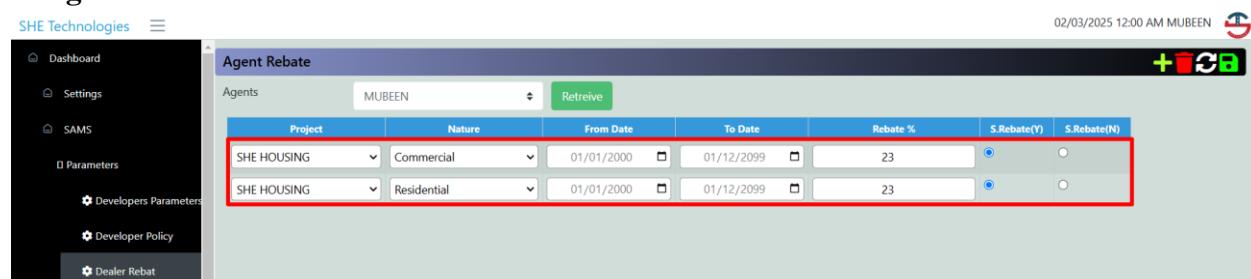
**Go to SAMS → Parameters → Dealer Rebate**

Retrieve The Defined Dealer and Set Criteria as shown in image and Save it.

Select S.Rebate(Y) if want to give Manual/Editable Percentage/Amt.

Select S.Rebate(N) If want to give Auto/Non-Editable Fixed Percentage (defined in Rebate%)

Image:



Project	Nature	From Date	To Date	Rebate %	S.Rebate(Y)	S.Rebate(N)
SHE HOUSING	Commercial	01/01/2000	01/12/2009	23	<input checked="" type="radio"/>	<input type="radio"/>
SHE HOUSING	Residential	01/01/2000	01/12/2009	23	<input checked="" type="radio"/>	<input type="radio"/>

## Step 2.2: [Set Dealer on Member Registration]

### Instructions:

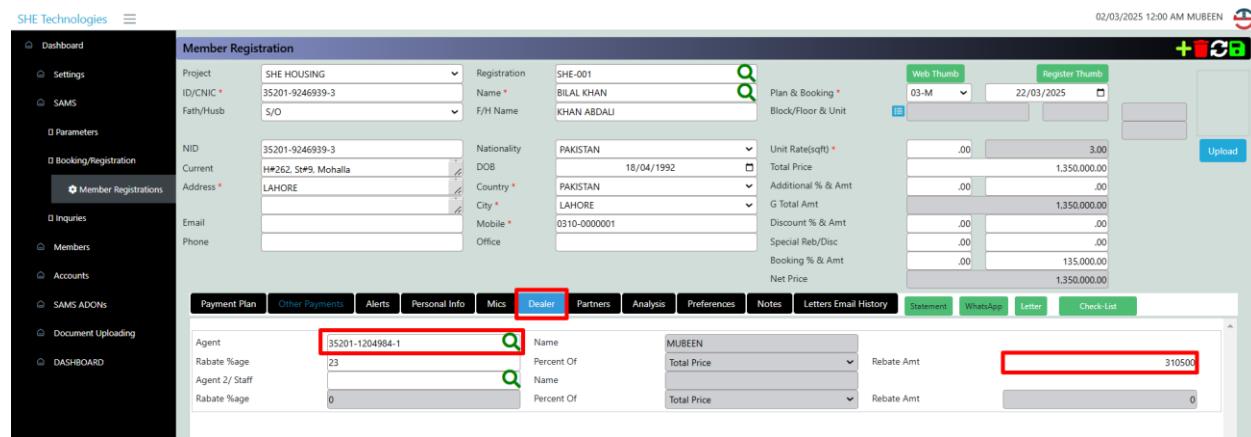
### Go to SAMS → Booking/Registration → Member Registrations

Open Dealer Tab, And Write the ID Number of defined dealer in Agent Field and save it as shown in image.

If Defined in Step 2.1 As [ S.Rebate(Y) ]

Then it will be As Manual/Editable Percentage as shown in image.

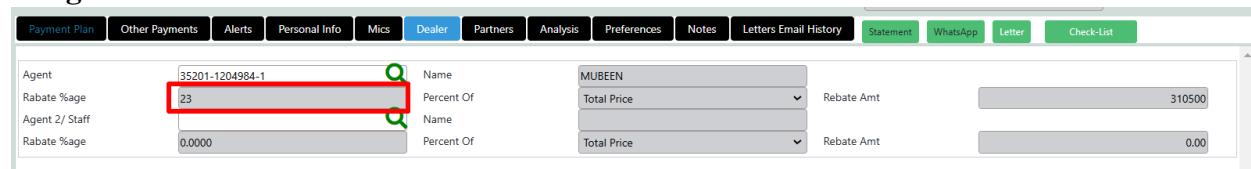
### Image:



If Defined in Step 2.1 As [ S.Rebate(N) ]

Then it will be As Fixed Percentage as shown in image.

### Image:



### 3. Dealer Ledger - Accounts

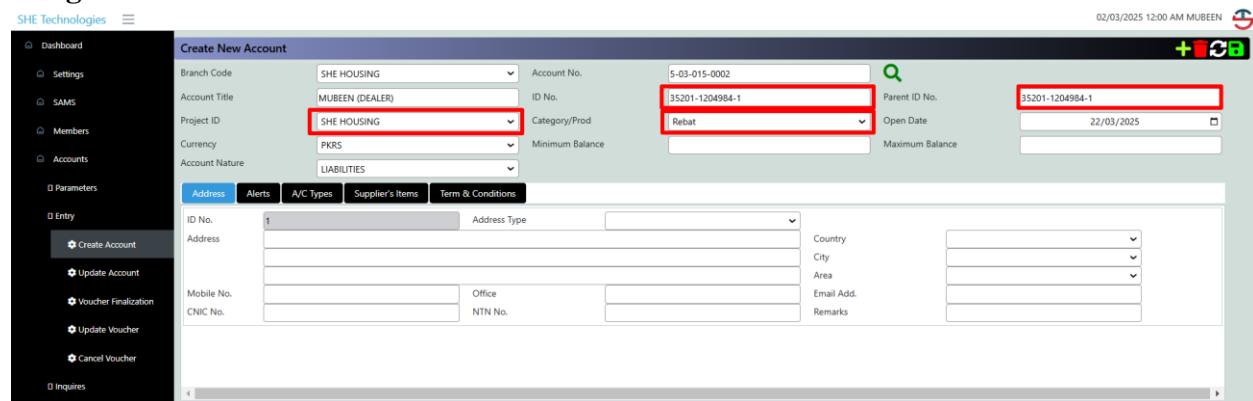
#### Step 3.1: [Define Dealer's Ledger Accounts]

Instructions:

Go to Accounts → Entry → Create Account

Create a GL at posting level and Select the Highlighted options as shown in image. (The Id\_No And Parent\_ID should be same as the dealer's id\_no defined in Member Information)

Image:



### 4. Dealer Rebate Policy and Payment

#### Step 4.1: [Define Policy for Dealer Rebate Voucher – Auto Voucher]

Instructions:

Go to SAMS → Parameters → Developers Policy

Make sure this policy is defined in developers policy as shown in image.

If unable to find this policy ask your IT Person to execute attached query in SQL environment.

Image:



Administrator Task:

\*Execute this attached query only if the policy is not defined in developers policy\*

```
INSERT INTO developers_policy
(brn_code, section_code, key_code, key_value, key_remarks, value_type, Date,
PaymentMethod)
VALUES
('000000', 'PAYM', 'ACC_LINAKAGE', 'Y', 'ACC_LINAKAGE for payments', 'U', NULL,
NULL)
```

## Step 4.2: [Pay Dealer's Rebate to Dealer]

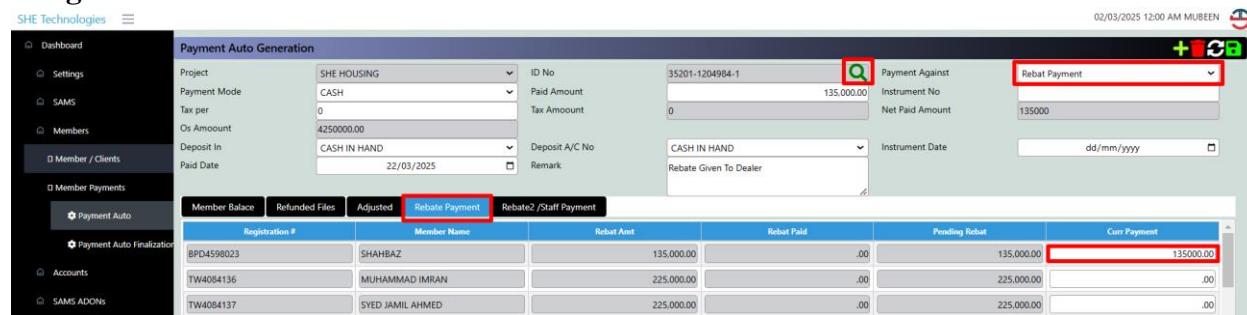
### Instructions:

#### Go to Members → Members Payments → Payment Auto

Select Dealer's Id Number from the search button.

Upon searching Select The highlighted options and pay the desired amount to Dealer (Which was defined in Member Registration Screen Against Registration Number ) as Shown in Image and Save it.

### Image:



Registration #	Member Name	Rebat Amt	Rebat Paid	Pending Rebat	Curr Payment
BPD4598023	SHAHBAZ	135.000.00	.00	135.000.00	135000.00
TW4084136	MUHAMMAD IMRAN	225.000.00	.00	225.000.00	.00
TW4084137	SYED JAMIL AHMED	225.000.00	.00	225.000.00	.00

## Step 4.3: [Finalize Payment Auto Process]

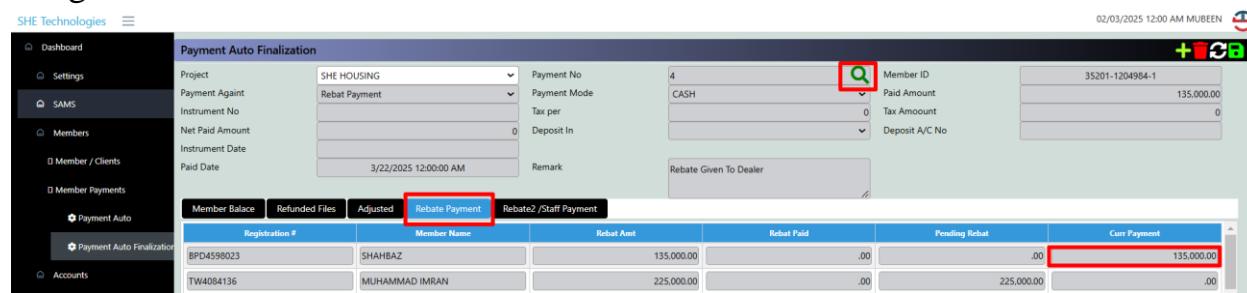
### Instructions:

#### Go to Members → Members Payments → Payment Auto Finalization

Select the Saved Payment from the search button and retrieve the generated payment.

Upon Searching the payment, Click on Rebate Payment Tab and verify the Generated Payment as shown in image and save it. i.e (The Payment will be generated and the voucher will be Auto Posted in Client's GL)

### Image:



Registration #	Member Name	Rebat Amt	Rebat Paid	Pending Rebat	Curr Payment
BPD4598023	SHAHBAZ	135.000.00	.00	.00	135.000.00
TW4084136	MUHAMMAD IMRAN	225.000.00	.00	225.000.00	.00