



Enterprise-class  
cloud software

# Trade & Channel Programs

Billbacks →

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Deal Registration →



## Extend the capabilities of your ERP

Unlock the full potential of your trade and channel programs by optimizing and tracking their performance. With as much as 20% of revenue tied to channel partner programs, manufacturers face significant risks from errors in processing, inaccurate payments and incorrect claims. Boost profitability with the Go-to-Market Suite® (GTMS®) Trade and Channel Programs module by Vistex. The GTMS Trade and Channel Programs solution equips you with advanced tools to model, manage and evaluate your programs – empowering you to uncover their true value and make data-driven decisions to enhance performance.

With the power of an enterprise solution, you can streamline program administration, ensuring precision and transparency across all processes. Enhanced by intuitive visualizations, personalized dashboards and real-time analytical insights, your programs will achieve maximum efficiency and profitability. Take control of your trade and channel programs with confidence, backed by a solution that drives both revenue and results.

## Maximize revenue by optimizing and tracking your trade programs with precision



### Billbacks

Manage complex tasks such as contract updates, ongoing and retroactive transaction processing, vendor invoicing, claim reconciliation and more with a single, integrated approach.



### Co-op & MDF

Gain end-to-end program visibility to manage planning and funds allocation, track spend, claims and collections, and monitor approvals and performance.



### Sales Rebates

Deliver end-to-end support for sales rebate programs including modeling, tracking, analyzing and reporting.



### Channel Tracking

Attain full visibility into accurate inventory data – from channel partner to customer.



### Tenders

Gain control over the tender and RFP process from start to finish.



### Deal Registration

Reduce channel conflict and manage partner pipeline.

## Billbacks

Whether you refer to them as billbacks, chargebacks, rebates, ship & debits, SPAs or some other term, chances are your company is losing money due to inefficient processing of partner claims. Manufacturers lose millions of dollars annually due to inaccurate claim validations. Vistex streamlines claim management – from receipt and validation to payment – offering unprecedented accuracy and control.

The Trade Program Billback component allows manufacturers to minimize losses due to inaccurate processes, lax claim validations, calculation errors and other administration problems. For manufacturers, this means knowing the true selling price and the ability to make informed financial decisions.

The Billbacks component offers an efficient, highly automated approach to managing the entire billbacks lifecycle. It enables manufacturers to manage the entire process from agreement creation to accrual, claim submission/receipt through adjudication settlement and, as warranted, resubmission and adjustment.

### Accomplish more

Gain visibility into your most profitable products, distributors, customers and geographies

Validate billbacks with a complete audit trail

Calculate and accrue billbacks for financial reporting and profitability analysis

Record accruals and billbacks in full compliance with financial regulations

Reduce claim processing costs, errors, disputes and delays

# Co-op & MDF

Co-op & MDF programs can help manufacturers boost partner engagement, but they are complicated to manage, especially with spreadsheets. Co-op & MDF programs require an enterprise-wide structure for end-to-end visibility and program management. Vistex provides you with the visibility to manage planning and funds allocation, track spending, claims and collections, and monitor approvals and performance.

The Co-op & MDF component of the Trade Programs module delivers an efficient, highly automated approach to managing every aspect of Co-op & MDF programs. The Co-op & MDF functionality allows you to manage funds and balances effectively and streamline and automate approvals, claims, requests and payments while offering visibility into program financial data and metrics. Robust analytics provide comprehensive insights into spending, program effectiveness, and the status of electronically submitted claims, forms, documents and receipts — geared toward speeding up payment accuracy and boosting partner satisfaction.

The Co-op & MDF component provides a 360-degree view of the entire fund cycle with comprehensive, integrated tools to help businesses cut costs, view critical analytics and performance data, increase transparency into effective utilization, minimize the back-and-forth of claim validations and stimulate greater loyalty from valued channel partners.



# Sales Rebates

Without an enterprise solution in place or by using manual processes, sales (customer) rebate calculation errors diminish profitability. With the Trade Programs module, businesses can accurately forecast, plan and track all rebate programs and incentivize customer performance by tying rebates to measurable objectives.

The Sales Rebates component of the Trade Programs module enables you to model, administer, report on, and analyze highly complex rebate plans, including volume, growth, market share and other multidimensional scenarios.

Manufacturers can track the status of rebate programs, perform accurate accruing for rebate liabilities, settle rebates on schedule, and report all rebate activity using financial and profitability analysis statements.



## Accomplish more

Improve value by incenting customer performance with rebates tied to measurable objectives

Calculate payments for individual customers and partners or in aggregate based on members in a buying group

Communicate current payout and next-tier qualification thresholds to spur additional revenue opportunities with partners

Forecast, plan and track flat, tiered, volume, growth and other rebates

Perform midstream evaluation to optimize program performance and retroactively recalculate amounts due

## Channel Tracking

You need effective tools to manage inventory, associated claims, and rebates to and from channel partners. Vistex provides tools that enable visibility into channel inventory by recording sales into the channel and capturing critical POS data from partners.

The Channel Tracking component of the Trade Programs module allows businesses to maintain inventory and track ownership, accrue and accurately recognize revenue. With Channel Tracking, you will know inventory on hand, anticipate potential stock-outs and validate partner claims, eliminating reporting inaccuracy and unnecessary business exposure. With integrated serial number tracking, validations can even be done at the serial number level.

Channel Tracking manages multiple locations, with detailed tracking that improves supply chain management and provides end-to-end insight from manufacturer to channel partner to end customer and all activities in the channel sales process. Essential reporting tools improve profitability by estimating the impact of price drops based on inventory levels and providing in-depth, real-time views into key partners.

### Accomplish more

Use inventory pools to validate claim pricing and quantities for accuracy

Process partner data automatically, including POS, inventory and claims

Compile inventory reports on moving inventory and current inventory status

Use inventory levels to estimate price protection liabilities and mitigate overpayments of claims

# Tenders

For many businesses, tender management is essential to overall revenue forecasting, management and measurement. With the Tender component, you gain control over the tender and RFP process from start to finish. Contracts and pricing are integrated with planning to formalize the entire RFP process.

To maintain a competitive advantage, manufacturers need end-to-end insights into how tenders have performed, access to and tracking wins and losses, and forecasted inventory levels when tenders are attained.

Bids can be priced for profit or market penetration as part of a well-structured tender management process. When aligned with internal objectives and demand planning, businesses can improve on the results of previous tenders by reevaluating responses, retendering for similar contracts and standardizing the bidding process.





# Deal Registration

A key aspect of selling is understanding your pipeline. In a direct and indirect model, pipeline visibility can be a challenge without visibility to opportunities in both channels. Channel conflict can be avoided when partners and vendors align on opportunities and can better collaborate to improve close rates and decrease sales cycle times.

Deal Registration is a foundational aspect of pipeline visibility and establishing a clear relationship between the manufacturer, partner and customer. Manufacturers gain visibility into forecasted revenue through partner registration of sales opportunities. Tying incentives to stages of the sales cycle or opportunity elements (e.g., deal size, value vs. volume products) can drive behavior that results in greater profitability and increased close rates.

When manufacturers consider tiered incentives, sales commissions and the impact of billbacks or SPAs, they can see the complete picture of deal, partner and/or customer value.



## Accomplish more

Identify, formalize and protect opportunities by registering prospects and deals

Set alerts for time-to-close periods, track negotiations, deal terms and pricing impact

Attain clear line-of-sight to ROI with deal tracking and full audit trails

Enable collaboration and increase transparency between account managers and distributors

Identify opportunities by status, customer, product and more

Use pricing, commissions, billback and special pricing to determine true sales profitability



## Automate, streamline and gain end-to-end visibility for revenue management with GTMS

Eliminate errors with a single source of truth so analysis is straightforward and innovation is possible

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Support programs with flexibility and a “future-proof” design for a competitive edge

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Gain end-to-end transparency to program performance capturing every impact on revenue and margin

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Scalable and performance-tested at the world’s largest enterprises across multiple industries

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Reduce financial, audit and compliance complexity with deep functionality around financial controls

# About Go-to-Market Suite®

Vistex Go-to-Market Suite® (GTMS®) is an enterprise-class, modular-based application that helps drive revenue, control spend and influence behavior. GTMS is specifically designed to offer unprecedented visibility into program performance, providing unparalleled insight into the management of entire programs, and provides end-to-end insights into overall program effectiveness while driving topline revenue and improving bottom line profit.

## GTMS Cloud Modules



### **Trade & Channel**

Make more informed decisions to maximize trade program performance.



### **Vendor Funding** >

Maximize cost recovery programs and find opportunities for revenue growth.



### **Price Management** >

Drive prices, determine true profitability, and gain a holistic view of your pricing programs.



### **Rights & Royalties** >

Save time and earn more from your intellectual property and artistry works.



### **Performance Incentives** >

Effectively manage incentive compensation, drive behavior and improve performance.

# Deployment

Vistex Go-to-Market Suite integrates with any ERP and manages and analyzes your margins on both the buy- and sell-side. It offers real-time insights into program performance and provides a clear picture of how programs impact your financial, marketing and sales functions.

## Cloud for any ERP



ERP agnostic revenue management software



Enterprise-class modular-based application



Interfaces with any ERP provider including SAP, Oracle, Microsoft, Epicor, Infor and more

## About Vistex®

Vistex solutions help businesses take control of their mission-critical processes. With a multitude of programs covering pricing, trade, royalties and incentives, it can be complicated to see where all the money is flowing, let alone how much difference it makes to the topline and the bottomline. With Vistex, business stakeholders can see the numbers, see what really works, and see what to do next – so they can make sure every dollar spent or earned is really driving growth, and not just additional costs. The world's leading enterprises across a spectrum of industries rely on Vistex every day to propel their businesses.

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