



Supplier Rebate Portal Feature Guide

Rebate Updates via File Import



Introducing the new import feature!

- This training guide will take you through how to use the Import feature to Adjust or Accept Rebate amounts in a bulk fashion
- Avoid having to adjust or accept rebates one-by-one in the Portal with this new feature!

Note: You can still adjust or accept rebates by clicking the distributor row in the Portal as you normally would if preferred.

Welcome, Georgia Alpha! →

Payment Report

Displaying Results: Jan/01/2024 to Jun/30/2024

NEW!

EXPORT ▾ **IMPORT .XLSX** NEW SEARCH

Filter by Distributor or Status

Total Act Reb Amt: **\$35.00** ⓘ
Total FPC: **\$1,612.67** ⓘ

Distributor Partner ↑	Invoiced PO Amt (\$) ⓘ	Est Reb Amt (\$) ⓘ	Act Reb Amt (\$) ⓘ	FPC (\$) ⓘ	Status	Amt Due (\$) ⓘ
Artina Promotional Products	300.00	6.00	15.00	None	15.00	↓



Export the Data

- Export the Distributor Summary .XLSX
- The Export file will be your template, and working document, for adjusting and accepting rebates for import.

The screenshot shows the 'Supplier Portal' interface for a 'Payment Report'. The report is for 'Alphabroder US' and displays results from Jan/01/2024 to Jun/30/2024. An 'EXPORT' dropdown menu is open, highlighting 'Distributor Summary .XLSX'. The report table includes columns for Distributor Partner, Invoiced PO Amt (\$), Est Reb Amt (\$), Act Reb Amt (\$), FPC (\$), Status, and Amt Due (\$). The total amount due is \$35.00, with \$12.67 for non-syncore purchases.

Distributor Partner ↑	Invoiced PO Amt (\$) ⓘ	Est Reb Amt (\$) ⓘ	Act Reb Amt (\$) ⓘ	FPC (\$) ⓘ	Status	Amt Due (\$) ⓘ
Artina Promotional Products	300.00	6.00		15.00	None	15.00
Club Colors	600.00	12.00		30.00	None	30.00
Dei Rossi Marketing	0.00	0.00		0.00	None	0.00
Eskimo Joe's Promotional Products Group, Inc.	1,233.50	24.67		61.68	None	61.68
LogoMedia	4,869.86	40.00	35.00	243.49	Adjusted	278.49
You Name It Specialties, Inc.	25,250.00	147.00		1,262.50	None	1,262.50

Rows per page: 10 | 1-6 of 6



File Home Insert Page Layout Formulas Data Review View Automate Help

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. **Enable Editing**

	A	B	C	D	E	F	G
1	Distributor Partner	Invoiced PO Amt (\$)	Est Reb Amt (\$)	Act Reb Amt (\$)	Status	Amt Due (\$)	Reason for Rebate Adjustment
2	Artina Promotional Pro	300.00	6.00		None	15.00	
3	Club Colors	600.00	12.00		None	30.00	
4	Dei Rossi Marketing	0.00	0.00		None	10.00	
5	Eskimo Joe's Promotio	1233.50	24.67		None	61.68	
6	LogoMedia	4869.86	40.00	35.00	Adjusted	278.49	Days to pay exceeded terms.
7	You Name It Specialties	25250.00	147.00		None	1262.50	
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Supplier Payment Report | Instructions for Rebate Updates | Reference

In some cases, you will need to click "Enable Editing" in Excel before you can start editing the file



The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Distributor Partner	Invoiced PO Amt (\$)	Est Reb Amt (\$)	Act Reb Amt (\$)	Status	Amt Due (\$)	Reason for Rebate Adjustment									
2	Artina Promotional Pro	300.00	6.00		None	15.00										
3	Club Colors	600.00	12.00		None	30.00										
4	Dei Rossi Marketing	0.00	0.00		None	10.00										
5	Eskimo Joe's Promotio	1233.50	24.67		None	61.68										
6	LogoMedia	4869.86	40.00	35.00	Adjusted	278.49	Days to pay exceeded terms.									
7	You Name It Specialties	25250.00	147.00		None	1262.50										
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The orange highlighted areas are columns D, E, and G. A pink text box on the right states: "The orange highlighted are the columns you will be using to update rebates using the Import feature."



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File Home Insert Page Layout Formulas Data Review View Automate Help

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Distributor Partner	Invoiced PO Amt (\$)	Est Reb Amt (\$)	Act Reb Amt (\$)	Status	Amt Due (\$)	Reason for Rebate Adjustment									
2	Artina Promotional Prod	300.00	6.00		None	15.00										
3	Club Colors	500.00	12.00		None	30.00										
4	Dei Rossi Marketing	0.00	0.00		None	10.00										
5	Eskimo Joe's Promotior	1233.50	24.67		None	61.68										
6	LogoMedia	4869.86	40.00	35.00	Adjusted	278.49	Days to pay exceeded terms.									
7	You Name It Specialties	25250.00	147.00		None	1262.50										
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Supplier Payment Report | Instructions for Rebate Updates | Reference



File Home Insert Page Layout Formulas Data Review View Automate Help

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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Distributor Partner	Invoiced PO Amt (\$)	Est Reb Amt (\$)	Act Reb Amt (\$)	Status	Amt Due (\$)	Reason for Rebate Adjustment									
2	Artina Promotional Pro	300.00	6.00		None	15.00										
3	Club Colors	600.00	12.00		None	30.00										
4	Dei Rossi Marketing	0.00	0.00		None	10.00										
5	Eskimo Joe's Promotio	1233.50	24.67		None	61.68										
6	LogoMedia	4869.86	40.00	35.00	Adjusted	278.49	Days to pay exceeded terms.									
7	You Name It Specialties	25250.00	147.00		None	1262.50										
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Supplier Payment Report Instructions for Rebate Updates Reference +

- The Supplier Payment Report must remain the 1st tab for Import.
- Additional Tabs may be added for ease of reconciliation
- Additional Instructions can be found in the Instructions tab.



To Adjust a rebate amount, the following is required:

- Enter the adjusted amount in Act Reb Amt (\$) (Column D) without the dollar sign
- Change Status to Adjusted (Column E)
- Enter a Reason for Rebate Adjustment (Column G).

	A	B	C	D	E	F	G	H	I	J	K
1	Distributor Partner	Invoiced PO Amt (\$)	Est Reb Amt (\$)	Act Reb Amt (\$)	Status	Amt Due (\$)	Reason for Rebate Adjustment				
2	Artina Promotional Pro	300.00	6.00		Accepted	15.00					
3	Club Colors	600.00	12.00		None	30.00					
4	Dei Rossi Marketing	0.00	0.00		None	10.00					
5	Eskimo Joe's Promotior	1233.50	24.67		None	61.68					
6	LogoMedia	4869.86	40.00	30.00	Adjusted	278.49	Days to pay exceeded terms.				
7	You Name It Specialties	25250.00	147.00	250	Adjusted	1262.50	Test reason here.				
8											
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To Accept a rebate amount:

- Change Status to Accepted (Column E)
- The Act Reb Amt (\$) (Column D) and Reason for Rebate Adjustment (Column G) must be blank.

	A	B	C	D	E	F	G	H	I	J	K
1	Distributor Partner	Invoiced PO Amt (\$)	Est Reb Amt (\$)	Act Reb Amt (\$)	Status	Amt Due (\$)	Reason for Rebate Adjustment				
2	Artina Promotional Pro	300.00	6.00		Accepted	30.00					
3	Club Colors	600.00	12.00		None	30.00					
4	Dei Rossi Marketing	0.00	0.00		None	10.00					
5	Eskimo Joe's Promotior	1233.50	24.67		None	61.68					
6	LogoMedia	4869.86	40.00	30.00	Adjusted	278.49	Days to pay exceeded terms.				
7	You Name It Specialties	25250.00	147.00	250	Adjusted	1262.50	Test reason here.				
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To Skip a rebate amount:

- Leave the Status as None (Column E)
- The Act Reb Amt (\$) (Column D) and Reason for Rebate Adjustment (Column G) must be blank.
- Rows in None status will be skipped upon import and no changes will be made.
- Distributors still in None status at the end of the audit period will be automatically accepted by the system

	A	B	C	D	E	F	G	H	I	J	K
1	Distributor Partner	Invoiced PO Amt (\$)	Est Reb Amt (\$)	Act Reb Amt (\$)	Status	Amt Due (\$)	Reason for Rebate Adjustment				
2	Artina Promotional Pro	300.00	6.00		Accepted	15.00					
3	Club Colors	600.00	12.00		None	30.00					
4	Dei Rossi Marketing	0.00	0.00		None	0.00					
5	Eskimo Joe's Promotior	1233.50	24.67		None	61.68					
6	LogoMedia	4869.86	40.00	30.00	Adjusted	278.49	Days to pay exceeded terms.				
7	You Name It Specialties	25250.00	147.00	250	Adjusted	1262.50	Test reason here.				
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Ready for Import!

- Save the excel file with your updates to your device and close the file.
 - *Note: You can rename the file to something that makes the most sense to you*
- Click the Import .XLSX button to import

Welcome, Georgia! →

Payment Report

Displaying Results: Jan/01/2024 to Jun/30/2024

EXPORT | **IMPORT .XLSX** | NEW SEARCH

Filter by Distributor or Status

Total Act Reb Amt: **\$35.00** ⓘ
Total FPC: **\$1,612.67** ⓘ

Distributor Partner ↑	Invoiced PO Amt (\$) ⓘ	Est Reb Amt (\$) ⓘ	Act Reb Amt (\$) ⓘ	FPC (\$) ⓘ	Status	Amt Due (\$) ⓘ	
Artina Promotional Products	300.00	6.00		15.00	None	15.00	↓
Club Colors	600.00	12.00		30.00	None	30.00	↓
Del Rossi Marketing	0.00	0.00		0.00	None	0.00	↓
Eskimo Joe's Promotional Products Group, Inc.	1,233.50	24.67		61.68	None	61.68	↓
LogoMedia	4,869.86	40.00	35.00	243.49	Adjusted	278.49	↓
You Name It Specialties, Inc.	25,250.00	147.00		1,262.50	None	1,262.50	↓



Ready for Import!

- Select the file you just saved on your device.
- Click Submit Adjustment to apply changes

Payment Report

Displaying Results: Jan/01/2024 to Jun/30/2024

EXPORT

Import .XLSX

Upload updated Payment Report Summary file.
Upload a single .XLSX file under 10MB. Once updated, import cannot be undone.

Distributor Summary Report - 2024 FirstHalf_0508.xlsx

Drag and drop file here

OR BROWSE FILES

CANCEL SUBMIT ADJUSTMENT

	Reb Amt (\$)	FPC (\$)
	0.00	15.00
	65.00	30.00
	10.00	0.00
	20.00	61.68
	35.00	243.49
You Name It Specialties, Inc.	32,600.00	147.00
	125.00	1,630.00



Success!

- A green confirmation message at the bottom of the screen indicates a successful import.
- **Act Reb Amt, Status and Amt Due** columns are updated in the report view.

Welcome, Georgia Alpha! →

Payment Report

Displaying Results: Jan/01/2024 to Jun/30/2024

EXPORT ▾
IMPORT .XLSX
NEW SEARCH

🔍 Filter by Distributor or Status

Total Act Reb Amt: **\$280.00** ⓘ

Total FPC: **\$1,612.67** ⓘ

Distributor Partner ↑	Invoiced PO Amt (\$) ⓘ	Est Reb Amt (\$) ⓘ	Act Reb Amt (\$) ⓘ	FPC (\$) ⓘ	Status	Amt Due (\$) ⓘ	
Artina Promotional Products	300.00	6.00	6.00	15.00	Accepted	21.00	↓
Club Colors	600.00	12.00		30.00	None	30.00	↓
Dei Rossi Marketing	0.00	0.00		0.00	None	0.00	↓
Eskimo Joe's Promotional Products Group, Inc.	1,233.50	24.67		61.68	None	61.68	↓
LogoMedia	4,869.86	40.00	30.00	243.49	Adjusted	273.49	↓
You Name It Specialties, Inc.	25,250.00	147.00	250.00	1,262.50	Adjusted	1,512.50	↓

Rows per page: 10 ▾ 1-6 of 6 |< < > >|

✔ Rebates have been adjusted. ✕



Error File

- If there are any issues in the data, the Distributor(s) with errors will not be updated in the portal, and an Error file will be available to view details.
- Click Download Error File to view.

Welcome, Georgia! →

Payment Report

Displaying Results: Jan/01/2024 to Jun/30/2024

EXPORT | IMPORT .XLSX | NEW SEARCH

Some rows were not updated due to errors. View errors in the error file. **Download Error File**

Filter by Distributor or Status

Total Act Reb Amt: \$280.00 ⓘ
Total FPC: \$1,612.67 ⓘ

Distributor Partner ↑	Invoiced PO Amt (\$) ⓘ	Est Reb Amt (\$) ⓘ	Act Reb Amt (\$) ⓘ	FPC (\$) ⓘ	Status	Amt Due (\$) ⓘ	
Artina Promotional Products	300.00	0.00		15.00	None	15.00	↓
Club Colors	600.00	0.00		30.00	None	30.00	↓
Dei Rossi Marketing	0.00	0.00		0.00	None	0.00	↓
Eskimo Joe's Promotional Products Group, Inc.	1,233.50	0.00		61.68	None	61.68	↓
LogoMedia	4,869.86	40.00	30.00	243.49	Adjusted	273.49	↓
You Name It Specialties, Inc.	25,250.00	0.00	250.00	1,262.50	Adjusted	1,512.50	↓

Rows per page: 10 | 1-6 of 6 | < >



Error File

- Further details are provided in Error column (Column H).
- Fix in the errors in the error file and re-upload it by following the same steps as before.
- Or, you can use the portal to update each Distributor that had errors.

The screenshot shows an Excel spreadsheet titled "Distributor Summary Report - 2024 FirstHalf_incorrect_Error". The spreadsheet has columns A through P. Column H is highlighted with a red box and contains error messages. The data in the spreadsheet is as follows:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Distributor Partner	Invoiced PO Amt (\$)	Est Reb Amt (\$)	Act Reb Amt (\$)	Status	Amt Due (\$)	Reason for Rebate Adjustment	Error								
2	Artina Promotional Pro	300.0	0.0	0.0	Accepted	15.0										
3	Club Colors	600.0	0.0	65.0	Adjusted	95.0										
4	Dei Rossi Marketing	0.0	0.0	10.0	Accepted	10.0										
5	Eskimo Joe's Promotior	1233.5	0.0	20.0	None	81.68										
6	LogoMedia	4869.86	40.0	35.0	Adjusted	278.49	Testing here									
7	You Name It Specialties	32600.0	147.0	125.0	Adjusted	1755.0	Test adjust 6/18 GW									
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The error messages in column H are:

- Status can not change to 'Adjusted' if a 'Reason for Rebate Adjustment' is not provided
- Status can not change to 'Accepted' if a 'Act Reb Amt(\$)' is provided
- Status can not change to 'None' if a 'Act Reb Amt(\$)' is provided



Supporting documents

Upload any supporting documents after Import by clicking the Distributor row

Adjust Rebate for LogoMedia
Half 1: Jan/01/2024 - Jun/30/2024

Select Action*
Adjust Rebate

Adjust rebate amount, enter reason and upload a file to support the adjustment.

Adjusted Rebate Amount*
35.00

Reason for Rebate Adjustment*
Testing here

Upload a supporting file (Optional)
Upload a single ZIP file folder, PDF, CSV, or XLSX file under 25MB.
The file cannot be deleted once the adjustment is submitted.

Drag and drop file here
OR BROWSE FILES

CANCEL SUBMIT ADJUSTMENT

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Rows per page: 10 1-6 of 6

Welcome, Georgia Alpha!

Payment Report
Displaying Results: Jan/01/2024 to Jun/30/2024

Filter by Distributor or Status

Distributor Partner ↑

- Artina Promotional Products
- Club Colors
- Dei Rossi Marketing
- Eskimo Joe's Promotional Products Group, Inc.
- LogoMedia**
- You Name It Specialties, Inc.

IMPORT .XLSX NEW SEARCH

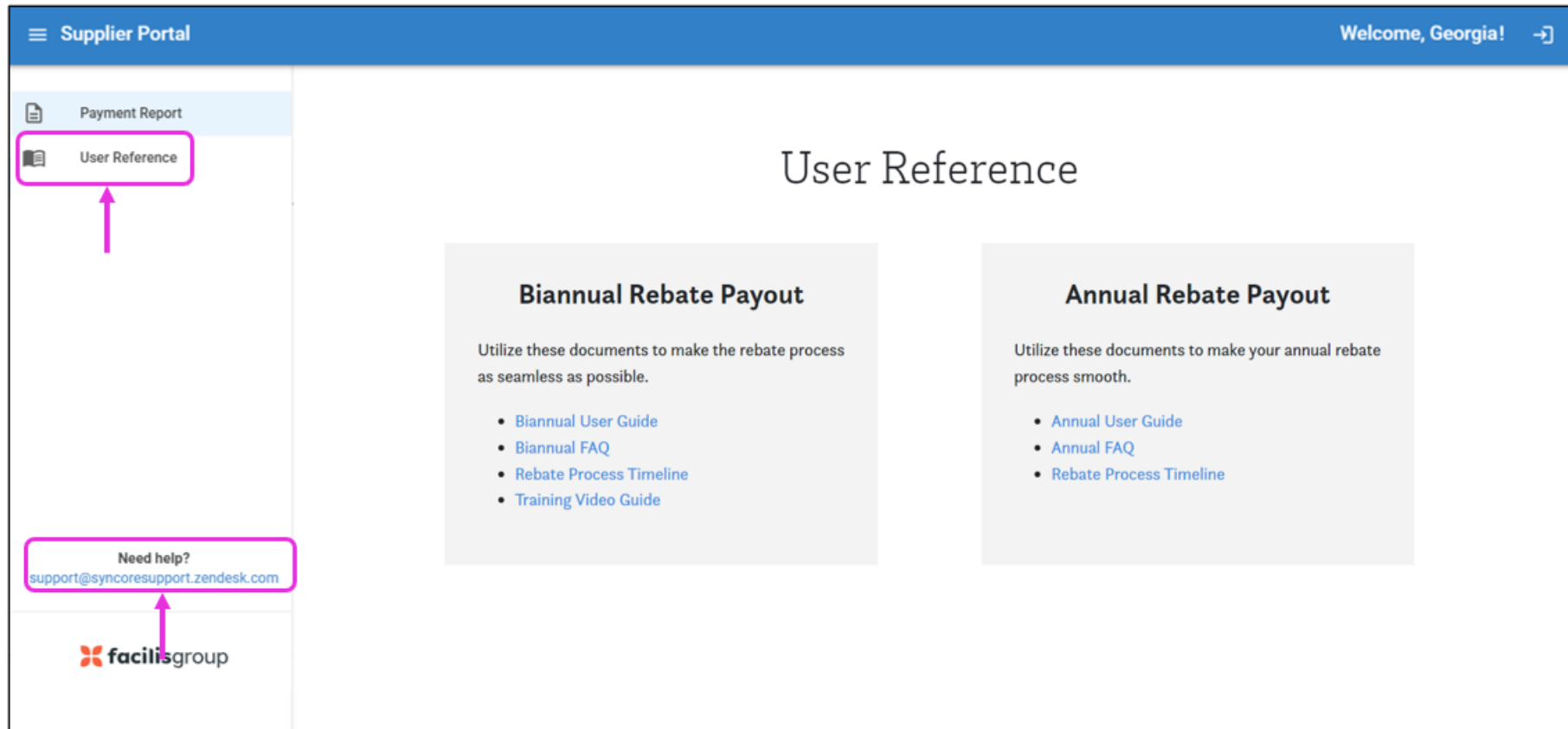
Total Act Reb Amt: **\$280.00**
Total FPC: **\$1,612.67**

FPC (\$)	Status	Amt Due (\$)
15.00	Accepted	15.00
30.00	None	30.00
0.00	None	0.00
61.68	None	61.68
243.49	Adjusted	273.49
1,262.50	Adjusted	1,512.50



Resources & Help

- User guides, FAQs and training videos can be found in User Reference
- For additional assistance, please reach out to support@syncoresupport.zendesk.com



Thank you!