

## Case Study

# Now it all adds up for a medical device Fortune 500 leader

Unified data management transforms complex chargebacks, membership and royalty operations for a global medical device leader



# Highlights



**\$1.8 Billion** and more than **30 Million** lines of chargeback claims annually



Processes **\$103 Million** in annual customer rebate payments using Vistex



**600,000** contracts managing **2.3 Million** records of customer and material combo through Vistex membership



*“Vistex provided us with an integrated solution that meets our claims, membership, agreements and settlement accuracy, speed and transparency needs.” We selected Vistex for chargebacks and royalty business processes. After our meetings, we realized they were the best solution for both membership and settlement needs.*

**Solution Manager**

# Overview

A Fortune 500 medical device manufacturer required an enterprise solution to modernize complex chargeback processing, membership management and royalty calculations. Serving healthcare institutions, researchers, clinical laboratories, and patients with medical devices, instrument systems, and diagnostic products, they needed a scalable platform to handle massive transaction volume and complex contract structures.

To support future growth, they needed to replace legacy systems with a scalable solution that would integrate with SAP ERP globally. Key challenges

included high-volume chargeback processing, inefficient roster reviews that required repeated research of previously rejected accounts, and inflexible agreement structures that prevented separate validity dates for customers and agreements. Additional complexity came from cumbersome exception management and intricate royalty arrangements. Managing 600,000 contracts across 2.3 million customer and material combinations required a unified platform to improve efficiency across claims, membership and settlement processes.



# Solution

The company selected SAP margin optimization solutions by Vistex for chargebacks, membership, and royalty business processes, aligning with their overall global ERP initiative. The solution replaces their legacy systems while providing comprehensive support with embedded financial controls.

The platform delivers automated chargeback processing, high-throughput capabilities, sophisticated membership management and advanced royalty calculation engines. For membership administration, Vistex implemented trade-organization concepts, enabling rosters to be maintained separately and linked to specific agreements. This

allows customer validity dates to differ from agreement dates, streamlining exception management. The solution includes intelligent flagging of previously rejected customer accounts, eliminating redundant roster review research.

Vistex's functionality was enhanced to meet specific requirements, including managing advance payments, calculating royalty accruals based on actual sales, settling royalty payments by period and creating product- or country-specific pricing rules. Integration with SAP material and customer master data enables seamless reporting and enterprise-wide data consistency.



# Results

Implementing SAP margin optimization solutions by Vistex delivered transformative improvements across the company's chargeback, membership and royalty operations. The integrated platform enabled efficient processing of massive transaction volumes while maintaining accuracy and transparency throughout their worldwide operations.

Key benefits realized include:

- High-volume chargeback processing: Successfully manages 1.8 billion dollars and more than 30 million lines of chargeback claims annually with improved efficiency
- Scalable membership management: Administers 600,000 contracts, managing 2.3 million customer and material combination records with intelligent account flagging

that eliminates redundant roster reviews of previously rejected customers

- Flexible agreement structures: Enable separate validity dates for customers and agreements through trade organization concepts, streamlining exception management and roster maintenance
- Robust rebate administration: Processes \$103 million in annual customer rebate payments with enhanced accuracy and speed
- Integrated royalty management: Automates complex royalty calculations, advance payments and settlement processes that previously required manual intervention
- Seamless SAP integration: Connects with material and customer master data, BI systems and other SAP modules for unified reporting and data consistency



Vistex®

Now it all  
adds up®



Solutions implemented:

**SAP margin optimization solutions by Vistex**

- SAP Paybacks & Chargebacks by Vistex
- SAP Incentive Administration by Vistex

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## About

This Fortune 500 company operates in more than 50 countries and has more than 30,000 associates. They manufacture and sell medical devices, instrument systems, and diagnostic products that serve healthcare institutions, researchers, clinical laboratories, and the general public.

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