

PRO-2d Page| 1 of 2

Category	Product
Course	Pricing
Version	1.0
Client	Generic
Software	2.12.100

Hints and Tips

- ✓ If your store is Head Office managed, they usually create and claim all rebates.
- ✓ An in-store rebate is created on the **Stock** screen -> **Deal** tab for the product.
Refer to the [PRO-2c In-store Deals and Rebates Fact Sheet](#).
- ✓ You can perform this procedure at any time, according to your preferred schedule. You may choose to run the query:
 - each time an order is invoiced
 - every day, week or month on the same schedule
 - once the rebate has finished.
- ✓ If a product is sold in multiple pack-sizes, each pack-size is listed separately in the grid, and the rebate is calculated based to the case equivalent sold.
- ✓ **Rebates based on Purchases** only include products that have been invoiced in the BOS **Payables -> Electronic Invoicing** or -> **Transactions** functions.
- ✓ The **Deal Claim \$** displays any **co-op based rebates**; Quantity is just a reference.
- ✓ The **Claim Amount \$** reflects the amount earned for the rebate.

EAN Code		000000088488	
anges	Sales History	Picture	Points
Cost	In Store	From Purchases	InvoicePosted
M	2.8	True	False
			17/03/2011 9:RIT

Claim an In-Store Supplier Rebate

A rebate is an extra discount off cost that you claim separately; it's claimed on either purchases or sales, and GP and cost isn't adjusted in SUREfire.

Use the Deal Claims function to calculate and create an invoice for the rebate amount your business is entitled to from the supplier.

Procedure to Claim a Rebate from the Supplier

1.	From the Tools menu, select Stock Functions -> Deal Claims .																																																																							
2.																																																																								
3.	In the Deals finished at midnight on field, select the date you want to claim up to.																																																																							
4.	Select what rebates you want to retrieve data for; Based on Sales or Based on Purchases . <i>*You can select both options.*</i>																																																																							
5.	Click Retrieve to populate each rebate with the claim Quantity (cases) and Amount . <i>*Make a note of each supplier, so you know who to print invoices for at step 8; you must know if a different invoice was saved against the rebate.*</i>	<table border="1"> <thead> <tr> <th>Supplier</th> <th>Sale or Purchase</th> <th>StockEAN</th> <th>Stock Description</th> <th>Discount Amount \$</th> <th>Start Date</th> <th>End Date</th> <th>Quantity</th> <th>Deal Claim \$</th> <th>Claim Amount</th> </tr> </thead> <tbody> <tr> <td>METCASH</td> <td>Sale</td> <td>9310088001938</td> <td>KLNX TISSUE PEACH</td> <td>7.20</td> <td>1/03/2011</td> <td>31/03/20</td> <td>1.66666</td> <td>0.00</td> <td>12.00</td> </tr> <tr> <td>METCASH</td> <td>Sale</td> <td>9310088001853</td> <td>KLNX TISSUE WHITE</td> <td>7.20</td> <td>1/03/2011</td> <td>31/03/20</td> <td>0.25</td> <td>0.00</td> <td>1.80</td> </tr> <tr> <td>METCASH</td> <td>Purchase</td> <td>9300701085216</td> <td>AEROGARD R/ON LW IRR</td> <td>5.00</td> <td>1/03/2011</td> <td>31/03/20</td> <td>4</td> <td>0.00</td> <td>20.00</td> </tr> <tr> <td>RIT</td> <td>Sale</td> <td>000000088488</td> <td>COKE 2LT</td> <td>2.80</td> <td>1/03/2011</td> <td>31/03/20</td> <td>1.375</td> <td>0.00</td> <td>3.85</td> </tr> <tr> <td>RIT</td> <td>Sale</td> <td>0000008848858</td> <td>COKE 2LT</td> <td>2.80</td> <td>1/03/2011</td> <td>31/03/20</td> <td>6</td> <td>0.00</td> <td>16.80</td> </tr> <tr> <td colspan="9" style="text-align: right;">Total Claim Amount:</td> <td>54.45</td> </tr> </tbody> </table>	Supplier	Sale or Purchase	StockEAN	Stock Description	Discount Amount \$	Start Date	End Date	Quantity	Deal Claim \$	Claim Amount	METCASH	Sale	9310088001938	KLNX TISSUE PEACH	7.20	1/03/2011	31/03/20	1.66666	0.00	12.00	METCASH	Sale	9310088001853	KLNX TISSUE WHITE	7.20	1/03/2011	31/03/20	0.25	0.00	1.80	METCASH	Purchase	9300701085216	AEROGARD R/ON LW IRR	5.00	1/03/2011	31/03/20	4	0.00	20.00	RIT	Sale	000000088488	COKE 2LT	2.80	1/03/2011	31/03/20	1.375	0.00	3.85	RIT	Sale	0000008848858	COKE 2LT	2.80	1/03/2011	31/03/20	6	0.00	16.80	Total Claim Amount:									54.45
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6.	Click Process to create an invoice for each account in the grid.																																																																							
7.	Click Yes to continue. <i>*Alternatively, click No to cancel this action.*</i> <i>*The processed rebates are removed from the grid, to prevent them from being claimed twice.*</i>																																																																							

Hints and Tips.

- ✓ Once you process rebates, the system automatically creates a cash-type AR record for the supplier (if one doesn't already exist).
 - This treats the supplier as a debtor who owes your company money; you can record their payment against their account (at POS or the **Receivables -> Payment Processing** function)
 - The system can automatically generate end of period invoice statements for you (rather than perform step 8), if you create and allocate the suppliers to a Rebate group on the **Parameters** tab (contact SUREfire Support if required).
- ✓ You can only **print an invoice** if the suppliers account has the following settings on the **Parameters** tab:
 - **Invoice Layout: AUD Layout**
 - **Print Invoice** check box selected.

You'll need to configure these selections if this is the first time you're claiming from the supplier.

Item	Description	Unit Price	Quantity	Extended Total
0000000088488	COKE 2LT	\$2.80	1.375	\$3.85
0000000088488	COKE 2LT	\$2.80	6	\$16.80
2 Items *Single Item(s) with GST				\$20.65
Gross Total (inc GST)				\$20.65
GST amount				\$1.87
Total Invoice				\$22.52

8. Complete the following steps to print the invoice/s for each supplier/invoicee:
 - a. From the BOS **Receivables** menu, select **Accounts**.
Or select the **Accounts Receivable shortcut.**
 - b. In the **Code** field, type or search for the supplier code for the nominated supplier (or invoicee if different).
 - c. Check the **Parameters** tab is set to print.
See **Hints and Tips.**
 - d. Click the **Transactions** tab.
 - e. Select the applicable invoice in the top grid.
 - f. Click **Re-Print** to print an itemised invoice.
Selecting **Print will only print the total.**
 - g. Select the **Report To** option **Screen**.
Alternatively, you can select a **Printer to print without previewing the invoice.**
 - h. Click **Run**.
 - i. Click the **Print** icon to print the invoice.
Click the **Print Setup icon first, if you need to select a different printer.**
 - j. After the invoice has printed successfully, click the red [X] icon.
 - k. Repeat these steps for each supplier you're claiming a rebate from.
 - l. Click **Close** to exit the AR function.




Date	Reference	Type	Sub Account	Amount	Ap
17/03/2011	10409	AR Invoice		\$23.45	

Item	Description	Supplied	Price	Ext. Value	Unit Cos
0000000088488	COKE 2LT	1.375	\$2.80	\$3.85	
0000000088488	COKE 2LT	6	\$2.80	\$16.80	

9. Fax or mail the invoice to each supplier.

