

PRO-2t Page | 1 of 2


Category	Product
Course	Pricing (HOS)
Version	1.0
Client	Generic
Software	2.12.0.0


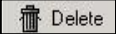

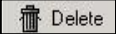
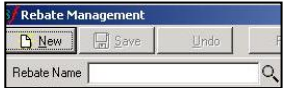

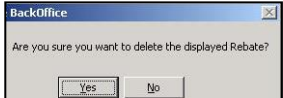

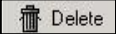




View and Create Supplier Rebates

A rebate is an extra discount off cost that you claim separately to a deal. It's claimed on either purchases or sales, & GP/cost isn't adjusted in SUREfire or on the invoice.

Procedure to View and Create a New Rebate

Hints and Tips

- ✓ You can create and claim a rebate in SUREfire even after the rebate has finished.
 - ✓ Example of rebates:
 - 4% rebate on sales of this group of products this month.
 - \$300 **co-op rebate** for putting our product on an end (*not based on purchase or sales, but you have to link it to one of these to trigger the one-off claim in the system*).
 - ✓ A **co-op rebate** is distributed proportionally across all stores the rebate is linked to, based on the percentage of the total claim earned by each store.
 - ✓ To create a **new rebate**, you can either start from scratch, copy an existing rebate, or edit the dates in an expired rebate.
 - ✓ In the **Rebate Name** field, click  to search for a rebate by name (or leave blank and click **Search** to retrieve all rebates). Click the required row to select the product, then click **Select**.
-
- ✓ Use a **Deal Code** that includes the number of weeks the rebate applies e.g. 1/2/3/Qtr.
 - ✓ The **Invoicee** is who will pay the rebate; it's not always the supplier; e.g. Metcash might deliver orders, but a Cadbury rep is offering a rebate off sales.

1.	From the HOS Tools menu, select Stock Functions , then Rebate Management .							
2.	<table border="1" style="width: 100%;"> <tr> <th style="width: 50%;">To:</th> <th style="width: 50%;">then:</th> </tr> <tr> <td>enquire on or edit an existing rebate</td> <td>in the Rebate Name field, type, or search for, the name of the rebate. Edit the applicable field/s. Click . End of procedure.</td> </tr> <tr> <td>delete a rebate (<i>usually only if it was created incorrectly</i>)</td> <td>in the Rebate Name field, type, or search for, the name of the rebate. Click . A warning is displayed. Click Yes to continue. End of procedure.</td> </tr> </table>	To:	then:	enquire on or edit an existing rebate	in the Rebate Name field, type, or search for, the name of the rebate. Edit the applicable field/s. Click  . End of procedure.	delete a rebate (<i>usually only if it was created incorrectly</i>)	in the Rebate Name field, type, or search for, the name of the rebate. Click  . A warning is displayed. Click Yes to continue. End of procedure.	  
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4.	Click  to create a new rebate.							
5.	In the Rebate Name field, type a unique name to identify the rebate. <i>*Maximum 30 characters.*</i> <i>*The name can't exist for an existing rebate.*</i>							
6.	In the Deal Code field, type a rebate code.							
7.	In the Invoicee field, type, or search for, the company paying the rebate.							
								

Hints and Tips

- ✓ A rebate is **generated from** sales or invoices, and can be paid as either a:
 - **Percentage** of the dollar value of sales or invoices
 - **Dollar per case** sold or invoiced
 - **Bonus Stock per case** sold or invoiced; make sure you increase SOH to account for the free stock when it's delivered.
- ✓ Rebates based on **Invoice History** generate rebate amounts from the invoices finalised in SUREfire during the rebate period
- ✓ Rebates based on **Sales History** generate rebate amounts from the sales of the product during the rebate period.
- ✓ You can create a rebate for a specific product, for products in a specific **product group** or a **stock group**, or for products in a nominated **sub range**.
- ✓ HOS managed rebates don't display at store level (in the BOS).
 - The rebate earned is calculated off the sales and invoice data transmitted from stores.
- ✓ To claim a rebate earned by the eligible stores, refer to the [PRO-2u Claim a HOS Supplier Rebate Fact Sheet](#).

8.	Select how the rebate will be Paid As . <i>*See Hints and Tips.*</i>																																		
9.	Select if the rebate will be Generated From Invoice History or Sales History .																																		
<div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin: 0 auto;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="3">Paid As</td> </tr> <tr> <td><input checked="" type="radio"/> Percentage</td> <td><input type="radio"/> Dollar per Case</td> <td><input type="radio"/> Bonus Stock per Case</td> </tr> <tr> <td colspan="3">Generated From</td> </tr> <tr> <td><input checked="" type="radio"/> Invoice History</td> <td colspan="2"><input type="radio"/> Sales History</td> </tr> </table> </div>			Paid As			<input checked="" type="radio"/> Percentage	<input type="radio"/> Dollar per Case	<input type="radio"/> Bonus Stock per Case	Generated From			<input checked="" type="radio"/> Invoice History	<input type="radio"/> Sales History																						
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10.	In the Affect field, select what category of product will receive the rebate. <i>*A single item, a sub range, a specific stock group, or a specific product group.*</i>	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td>Affect:</td> <td>Single Item</td> <td><input type="text"/></td> </tr> <tr> <td>Stock Code:</td> <td><input type="text"/></td> <td><input type="button" value="🔍"/></td> </tr> <tr> <td>Rebate %:</td> <td><input type="text"/></td> <td></td> </tr> </table> </div>	Affect:	Single Item	<input type="text"/>	Stock Code:	<input type="text"/>	<input type="button" value="🔍"/>	Rebate %:	<input type="text"/>																									
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11.	Based on the Affect selected in step 10, type or search for the selection that will receive the rebate. <i>*If a product in the selection has more than one EAN (e.g. different UPP), the rebate also applies to them.*</i>																																		
12.	If the rebate will then: be paid as: <table style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <td style="border-bottom: 1px solid black; padding: 5px;">a percentage</td> <td style="border-bottom: 1px solid black; padding: 5px;">in the Rebate % field, type the percentage amount</td> </tr> <tr> <td style="border-bottom: 1px solid black; padding: 5px;">dollar per case</td> <td style="border-bottom: 1px solid black; padding: 5px;">in the Rebate \$ field, type the dollar value of the rebate discount per case.</td> </tr> <tr> <td style="border-bottom: 1px solid black; padding: 5px;">bonus stock per case</td> <td style="border-bottom: 1px solid black; padding: 5px;">in the Bonus Qty field, type the bonus number of units given per case claimed.</td> </tr> </table> <p><i>*If there's a co-op rebate component, enter this amount in the Co-Op Amount field.*</i> <i>*Use a decimal place as required.*</i></p>	a percentage	in the Rebate % field, type the percentage amount	dollar per case	in the Rebate \$ field, type the dollar value of the rebate discount per case.	bonus stock per case	in the Bonus Qty field, type the bonus number of units given per case claimed.	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin-bottom: 5px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td>Affect:</td> <td>Stock Group Items</td> <td><input type="text"/></td> </tr> <tr> <td>Stock Group:</td> <td>Sargents</td> <td><input type="button" value="🔍"/></td> </tr> <tr> <td>Rebate %:</td> <td>3.5</td> <td></td> </tr> </table> </div> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin-bottom: 5px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td>Affect:</td> <td>Single Item</td> <td><input type="text"/></td> </tr> <tr> <td>Stock Code:</td> <td>438839</td> <td><input type="button" value="🔍"/></td> </tr> <tr> <td>Rebate \$:</td> <td>6</td> <td></td> </tr> </table> </div> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td>Affect:</td> <td>Stock Group Items</td> <td><input type="text"/></td> </tr> <tr> <td>Stock Group:</td> <td>S/Remo La Pa</td> <td><input type="button" value="🔍"/></td> </tr> <tr> <td>Bonus Qty:</td> <td>2.4</td> <td></td> </tr> </table> </div>	Affect:	Stock Group Items	<input type="text"/>	Stock Group:	Sargents	<input type="button" value="🔍"/>	Rebate %:	3.5		Affect:	Single Item	<input type="text"/>	Stock Code:	438839	<input type="button" value="🔍"/>	Rebate \$:	6		Affect:	Stock Group Items	<input type="text"/>	Stock Group:	S/Remo La Pa	<input type="button" value="🔍"/>	Bonus Qty:	2.4	
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16.	Select the Deal Active check box against the specific location/s the rebate will apply. <i>*The All Stores option automatically selects all stores.*</i>	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin: 0 auto;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="4" style="text-align: center;"> <input type="radio"/> Individual Store(s) <input type="radio"/> Banner(s) <input type="radio"/> Zone(s) <input checked="" type="radio"/> All Stores </td> </tr> <tr> <td style="width: 15%;"></td> <td style="width: 55%;"></td> <td style="width: 15%;"></td> <td style="width: 15%;"></td> </tr> <tr> <th>Store Number</th> <th>Store Name</th> <th>Deal Active</th> <th>Normal Cost</th> </tr> <tr> <td>2111</td> <td>Berowra Heights</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>0000</td> <td>Head Office</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>3582</td> <td>LANGWARRIN LIQUOR</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td></td> </tr> </table> </div>	<input type="radio"/> Individual Store(s) <input type="radio"/> Banner(s) <input type="radio"/> Zone(s) <input checked="" type="radio"/> All Stores								Store Number	Store Name	Deal Active	Normal Cost	2111	Berowra Heights	<input checked="" type="checkbox"/>		0000	Head Office	<input checked="" type="checkbox"/>		3582	LANGWARRIN LIQUOR	<input checked="" type="checkbox"/>										
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