

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

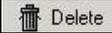
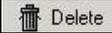
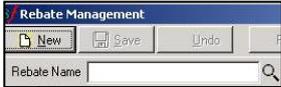
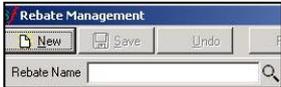
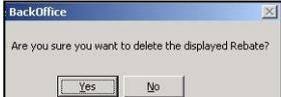
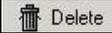
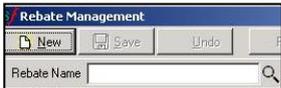
View and Create Supplier Rebates

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.	  
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.							
3.	<table border="1" style="width: 100%;"> <tr> <th style="width: 50%;">To:</th> <th style="width: 50%;">then:</th> </tr> <tr> <td>create a new rebate</td> <td>go to step 4.</td> </tr> <tr> <td>copy an existing rebate into a new rebate (<i>copies all details except for the rebate name and locations</i>)</td> <td>in the Rebate Name field, type, or search for, the rebate to copy. Click New. Go to step 5; edit the fields as required.</td> </tr> </table>	To:	then:	create a new rebate	go to step 4.	copy an existing rebate into a new rebate (<i>copies all details except for the rebate name and locations</i>)	in the Rebate Name field, type, or search for, the rebate to copy. Click New . Go to step 5; edit the fields as required.	 
To:	then:							
create a new rebate	go to step 4.							
copy an existing rebate into a new rebate (<i>copies all details except for the rebate name and locations</i>)	in the Rebate Name field, type, or search for, the rebate to copy. Click New . Go to step 5; edit the fields as required.							
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 gray; 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																						
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																																		
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 gray; 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 colspan="2"><input type="text"/></td> </tr> </table> </div>	Affect:	Single Item	<input type="text"/>	Stock Code:	<input type="text"/>	<input type="button" value="🔍"/>	Rebate %:	<input type="text"/>																									
Affect:	Single Item	<input type="text"/>																																	
Stock Code:	<input type="text"/>	<input type="button" value="🔍"/>																																	
Rebate %:	<input type="text"/>																																		
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 gray; 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 colspan="2">3.5</td> </tr> </table> </div> <div style="border: 1px solid gray; 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 colspan="2">6</td> </tr> </table> </div> <div style="border: 1px solid gray; 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 colspan="2">2.4</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	
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.																																		
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																																		
13.	In the Start Date/Time field, select the date the rebate is active.	<div style="border: 1px solid gray; padding: 5px; width: fit-content;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td>Start Date:</td> <td>4/10/2010</td> <td>12:01:00 AM</td> </tr> <tr> <td>End Date:</td> <td>10/10/2010</td> <td>11:59:59 PM</td> </tr> <tr> <td>Co Op Amount:</td> <td colspan="2">0</td> </tr> </table> </div>	Start Date:	4/10/2010	12:01:00 AM	End Date:	10/10/2010	11:59:59 PM	Co Op Amount:	0																									
Start Date:	4/10/2010	12:01:00 AM																																	
End Date:	10/10/2010	11:59:59 PM																																	
Co Op Amount:	0																																		
14.	In the End Date/Time field, select the date that the rebate finishes.																																		
15.	Select the type of location the rebate will apply to.																																		
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 gray; padding: 5px; width: fit-content;"> <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> <th style="width: 15%;">Store Number</th> <th style="width: 45%;">Store Name</th> <th style="width: 15%;">Deal Active</th> <th style="width: 25%;">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"/>														
<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"/>																																	
17.	Click Save																																		
18.	Click Close																																		
		<input type="checkbox"/>																																	