

**PRO-2c** Page | 1 of 2

Category	Product
Course	Pricing
Version	1.0
Client	Generic
Software	2.14.100.0

**Hints and Tips**

- ✓ If your store is Head Office managed, they create and maintain all deals and rebates.
  - ✓ A deal/rebate applies to all EANs for an item.
  - ✓ If you want a rebate to reflect in sale cost and GP, you can also create it as a deal, using the SS and WW sections.
  - ✓ If there is a deal and rebate over the same period, create them as separate records.
  - ✓ When there's an active deal or rebate, an icon displays at the bottom of the Stock screen.
- |                |      |  |
|----------------|------|--|
| Sales for week | 6.95 |  |
| Cost           | 3.27 |  |
- ✓ When you order a product on **deal**, the cost price on the BOS order screen displays the active deal cost price.
    - A mobile scanning device displays the normal price.
    - The **Reports -> Stock -> Invest Buy** report will list the item if it has been ordered.
  - ✓ If you **edit** a **sub-range** deal/rebate, it also applies the change against all the other products in the sub-range.
    - If you delete or change a sub-range record to affect 'single item', it deletes the deal/rebate against the other products.
  - ✓ Only **delete** a deal/rebate if it was incorrectly created.
  - ✓ A supplier can offer **multiple deals** with overlapping dates. This is usually on a 'best deal applies' arrangement, so this is how SUREfire also works.

## In-Store Supplier Deals and Rebates

A normal deal is a temporary reduction in the cost of a product, offered by the supplier; the invoice, and cost price and GP in SUREfire reflects the deal discount.

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.

### Procedure to View and Create a New Deal or Rebate

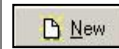
1.	From the BOS <b>Tools</b> menu, select <b>Stock Functions</b> , then <b>Stock</b> . <i>*Or click the <b>Stock Maintenance</b> icon.*</i>																																																														
2.	In the <b>EAN Code</b> field, type, or search for, the EAN to retrieve.																																																														
3.	Click the <b>Deal</b> tab. <i>*All active and past deals/rebates are displayed.*</i> <i>*You can click <b>Filter</b> to show only single item or sub-range level records.*</i>																																																														
<table border="1" data-bbox="614 1077 1481 1556"> <thead> <tr> <th>Deal</th> <th>EAN</th> <th>Supplier</th> <th>Deal</th> <th>Promotions</th> <th>Schedule Changes</th> <th>Sales History</th> <th>Picture</th> <th>Points</th> <th>Loyalty</th> <th>Scales</th> </tr> </thead> <tbody> <tr> <td>D3</td> <td></td> <td></td> <td>8/04/2013</td> <td>5/05/2013 11:59:59 PM</td> <td>7.22</td> <td>False</td> <td>False</td> <td></td> <td></td> <td>DAVNSW</td> </tr> <tr> <td>3</td> <td></td> <td></td> <td>11/08/2005</td> <td>2/09/2005 11:59:59 PM</td> <td>2.77</td> <td>False</td> <td>False</td> <td></td> <td></td> <td>DAVNSW</td> </tr> </tbody> </table> <p><b>Summary Information</b></p> <table border="1"> <tr> <td>Case Quantity</td> <td>24</td> <td>Sales for week</td> <td>0.00</td> </tr> <tr> <td>Current Sell Price</td> <td>2.92</td> <td>Current Cost Per Pack</td> <td>2.0242</td> </tr> <tr> <td>Current Margin</td> <td>30.6792%</td> <td>Current Cost Per Case</td> <td>48.5800</td> </tr> <tr> <td>Current Unit Price</td> <td>N/A</td> <td>AWC</td> <td>N/A</td> </tr> <tr> <td>Current Supplier</td> <td>METCASH</td> <td>Current Loyalty Points</td> <td>2.92</td> </tr> <tr> <td></td> <td></td> <td>Stock On Hand</td> <td>N/A</td> </tr> <tr> <td></td> <td></td> <td>GST Retail Perc</td> <td>10%</td> </tr> </table>			Deal	EAN	Supplier	Deal	Promotions	Schedule Changes	Sales History	Picture	Points	Loyalty	Scales	D3			8/04/2013	5/05/2013 11:59:59 PM	7.22	False	False			DAVNSW	3			11/08/2005	2/09/2005 11:59:59 PM	2.77	False	False			DAVNSW	Case Quantity	24	Sales for week	0.00	Current Sell Price	2.92	Current Cost Per Pack	2.0242	Current Margin	30.6792%	Current Cost Per Case	48.5800	Current Unit Price	N/A	AWC	N/A	Current Supplier	METCASH	Current Loyalty Points	2.92			Stock On Hand	N/A			GST Retail Perc	10%
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**Hints and Tips**

- ✓ The **Deal Code** is used as a filter on the deal reports. You might:
  - use [D] or [R] to denote deal or rebate
  - include the number of weeks the discount applies e.g. 1/2/3, or [OG] to denote on-going.
- ✓ The **Discount Amount** reflects the discount off the case cost of the product, not each unit. E.g. type [5.50] for a \$5.50 off case deal/rebate.
  - Use a decimal place as required.
- ✓ Example of rebates:
  - 20¢ rebate for every bottle of coke 2L sold during February (calculate the per case amount)
  - \$7.20 rebate for every case of Kleenex Tissue 275 pkt various colours ordered during March (this is a sub-range rebate).
  - \$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).
- ✓ 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.
- ✓ You invoice the supplier to claim a rebate quantity:
  - Refer to the [PRO-2d Claim an In-store Rebate Fact Sheet](#).
  - The screen doesn't indicate if the **invoicee** is different to the supplier; keep track of these variations to avoid confusion.
- ✓ Grid columns for rebates:
  - **In Store:** is True (displays False for deals).
  - **From Purchases:** is True if the **Generated From** option was set to **Purchase**
  - **Invoice Posted:** populates the date you invoice the rebate.

5. Complete the following steps to create a new deal:
  - a. Click **New**.
  - b. In the **Affect** field, select if the deal applies to only this product or to the sub-range.
  - c. In the **Deal Code** field, type a deal code.
  - d. In the **OI** (Off Invoice) field, type the dollar value of the deal per case.
  - e. In the **Start** and **End Date** fields, select the date the deal is active and finishes (leave the default time).
  - f. In the **Supplier Code** field, type or search for, the supplier offering the deal.
  - g. Click **Save**.

*\*The deal is listed in the grid.\**



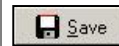
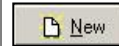
**All Deals**

Affect	Sub Range Items	Deal Code	D3	OI	7.22	+ SS	0	+ WW	0	= 7.22	Calculate	
Start Date	8/04/2013	12:00:00 AM	End Date	5/05/2013	11:59:59 PM	Supplier	DAVNSW : METCASH N					Promo->POS

6. Complete the following steps to create a new rebate:
  - a. Click **New**.
  - b. In the **Affect** field, select if the rebate applies to only this product or to the sub range.
  - c. In the **Deal Code** field, type a rebate code.
  - d. In the **WW** ('buy' rebate warehouse withdrawal) or **SS** (sell/scan rebate) field, type the dollar value of the rebate per case.
 

*\*if there's a co-op rebate component, it's recommended that you enter it as a separate rebate for clearer invoicing; type [0], & enter the co-op value in the Co Op Amount field.\**
  - e. In the **Start** and **End Date/Time** fields, select the date the rebate is active and finishes.
  - f. In the **Supplier Code** field, type or search for, the supplier offering the rebate.
  - g. Select the **In Store Deal** check box.
  - h. In the **Invoicee** field, type, or search for, the company paying the rebate.
  - i. Select if the rebate will be **Generated From Purchases** (WW) or **Sales** (SS).
  - j. Click **Save**.

*\*The rebate is listed in the grid.\**



Deal	Start Date	End Date	Cost	In Store	From Purchases	InvoicePosted	Supplier
R3	8/04/2013 12:00:01 AM	5/05/2013 11:59:59 PM	0.2	True	False		DAVNSW
D3	8/04/2013	5/05/2013 11:59:59 PM	7.22	False	False		DAVNSW
3	11/08/2005	2/09/2005 11:59:59 PM	2.77	False	False		DAVNSW

**All Deals**

Affect	Current Item	Deal Code	R3	OI	0	+ SS	0.2	+ WW	0	= 0.20	Calculate	
Start Date	8/04/2013	12:00:01 AM	End Date	5/05/2013	11:59:59 PM	Supplier	DAVNSW : METCASH N					Promo->POS

In Store Deal  Co-Op Amount  Invoicee  Generated From  Purchase  Sale Not Invoiced

7. When finished, click **Close**.

