



SYM-PAC

# Rebate Tracking

## How SYM-PAC's Rebate Tracking saves you money:

- *Keeping track of the rebates you expect back into the business can be a very time consuming task.*

Even though you *\*know\** it's costing you money, often this process is difficult to administer — you're printing out transaction lists, based on a date range, trying to add them up, & so on.

### So what happens then?

You end up taking whatever you're given & hoping that it's right.

## Do you know what you're owed?



## 6 questions to ask yourself about rebates:

- 1 How do you know what rebates you expect to get coming in from your suppliers?
- 2 How do you measure what rebates you are given versus what you should be getting?
- 3 How do you report on what you should get based on the deal you have in place with your suppliers?
- 4 How do you track the rebates on specific products or groups of products for a defined period of time?
- 5 How do you receive the payment or credit back from your supplier, and how often?
- 6 How do you know what rebate should be coming in if you are:
  - Budgeting?
  - Business planning?
  - Negotiating with suppliers?

**Rebate Listing**

Starting Supplier:  Ending:

as at Date:

**Reconciliation Periods**

- Rebate Reconciliation - Monthly
- Rebate Reconciliation - Bi-Monthly
- Rebate Reconciliation - Quarterly
- Rebate Reconciliation - 6 Monthly
- Rebate Reconciliation - Yearly

Includes Supplier deliveries based upon supplier invoice date entered on each Delivery Docket for purchased Rebates. Plus Sell through Rebates based upon the sales of items, flagged as "sell through" rebates.

Screen Printer Close

The range of selection criteria for reporting on your expected rebates is extensive.

Report by Supplier, at a date you decide. Then choose your Rebate Reconciliation Period: monthly, quarterly, & so on.

Rebate Tracking Details

Supplier: Z602 MAKITA AUSTRALIA PTY LTD

Entry No.	Title	Level	Code	Description	Starting Date	Ending Date	Rebate Percent	Rebate Amount	Target Amount	Target Frequency	Payment Method.	Payment Frequency	Comments
1	MAKALL	ALL		All Products	01/07/2014	30/06/2016	5.00			Monthly	Adj Note	Monthly	
2	MAKP	Product	100021562	MAKITA 9.6V NI-CD BATTERY 1.3AH 9000	01/07/2014	30/06/2016	2.50			Monthly	Cash	Monthly	
3													
4													

Payment Method selection includes:

- Adjustment Note
- Cash
- Bonus Item

Rebate Tracking Details

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2	MAKP	Product	100021562	MAKITA 9.6V NI-CD BATTERY 1.3AH 9000	01/07/2014	30/06/2016	2.50			Bi Monthly	Adj Note	Monthly	
3													
4													

Use Target Frequency to chose the timeframe for rebate calculation, for example:

- Monthly
- Quarterly
- Yearly, & so on.

Rebate Tracking Details

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2	MAKP	Product	100021562	MAKITA 9.6V NI-CD BATTERY 1.3AH 9000	01/07/2014	30/06/2016	2.50			Monthly	Adj Note	Monthly	
3													
4													

This example shows that for this supplier we get a 5% rebate on ALL products, plus an additional 2.5% on one particular product.

The end result is a powerful report that shows your supplier exactly what rebate you are expecting! This allows you to be on the front foot at your next meeting with your supplier sales representative or account manager.

(030/2) SUPPLIES Store: 001 Period: 09/2015 Printed on 11-SEP-2015 at 10:27am

### Rebate Reconciliation

Entry No.	Level	Type	Code	Description	Start Date	End Date	Rebate %	Rebate \$	Target Amount	Target Freq.	Payment Method	Payment Freq.		
<b>Z602 MAKITA AUSTRALIA PTY LTD</b>														
0001	MAKALL			All Products	01-07-14	30-06-16	5.00			No Freq		No Freq		
0002	MAKP		100021562	MAKITA 9.6V NI-CD BATTERY 1.3AH 9000	01-07-14	30-06-16	2.50			No Freq		No Freq		
Product	Description	Supp Date	P/Ord#	Ref # & Line	Qty	Purch \$								
100016189	MAKITA HEATGUN REDUCTION NOZZLE 10MM	11-09-15	10016085	00123654/1	4	25.92								
100021562	MAKITA 9.6V NI-CD BATTERY 1.3AH 9000	11-09-15	10016086	00564789/1	10	430.00								
100144290	MAKITA NI-CAD 1.2 BATTERY	07-10-14	10013334	11934959/1	1	43.10								
100144267	MAKITA REDUCING RING 22MM SUITS 2416S	07-10-14	10013334	11934959/2	3	13.47								
100130483	MAKITA KEYLESS DRILL CHUCK 10MM	07-10-14	10013334	11934959/3	1	20.65								
100138857	MAKITA SAW CHAIN 40CM - 3/8 .05U SC 56C/L	17-04-15	10015672	12045929/2	3	94.50								
100144693	MAKITA 18V B/LESS IMPACT WRENCH SKIN 280NM	17-04-15	10015672	12045929/3	1	239.00								
100093217	MAKITA 1400W HEAT GUN 2 SPEED	17-04-15	10015672	12045929/4	1	64.00								
100093219	MAKITA 2000W HEAT GUN 3 SPEED	17-04-15	10015672	12045929/5	1	97.00								
Rebate Calculations:							Title	Start	End	Target	Total \$	Tot Qty	Reb %	Total \$
							MAKALL	01-07-14	30-06-16	0.00	14374.40	123	5.00	718.72
							MAKP	01-07-14	30-06-16	0.00	430.00	10	2.50	10.75
							<b>TOTAL</b>	<b>REBATES</b>						<b>\$729.47</b>



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Solutions to get on with business

