

# Publix Cost/Promotion Form Instructions

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**Purpose** The *Publix Cost/Promotion Form* is used to detail all cost and promotion information applicable to an item.

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**Vendor procedures** Follow the steps below to complete the **non-shaded areas** of the *Publix Cost/Promotion Form*. The information must be typed.

The *Publix Cost/Promotion Form* must be stamped at the reception desk and immediately forwarded to the buyer (unless otherwise instructed by the buyer).

Field Description	Action
<input type="checkbox"/> New <input type="checkbox"/> Revision	Check the appropriate box. If Revision is checked, "Form # being replaced:" must be completed.
Form # being replaced	Revisions to <i>Publix Cost/Promotion Forms</i> must be made by filling out a new <i>Publix Cost/Promotion Form</i> with the updated information and a reference to the <i>Publix Cost/Promotion Form</i> that is being replaced. Enter the number of the <i>Publix Cost/Promotion Form</i> that is being replaced on this line. Highlight the changes being presented.
Buyer Name/#	Enter the name and number of the buyer to whom the <i>Publix Cost/Promotion Form</i> is presented.
Vendor Number	Enter the number assigned by Publix for a vendor. <b>DSD Vendors:</b> If you have more than one vendor number, and all information is the same for each vendor number, list all vendor numbers on this line. If you do not have enough room, list the remainder in the Vendor Comments box.
Manufacturer Name	Enter the name of the manufacturer of your item(s).
Invoicing Vendor Name	Enter the name that will appear on the invoice or statement sent to Publix.
Brokerage Name	Enter the name of the brokerage handling the account. If none, leave blank.
Sales Rep Name	Enter the name of the person calling on Publix.
Address	Enter the address of the broker or direct sales representative.
Phone #	Enter the phone number of the broker or direct sales representative.
Fax #	Enter the fax number for the broker or direct sales representative.
Publix Item Code	Enter the Publix identifier for an item. If this is a new item, leave blank.

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# Publix Cost/Promotion Form Instructions, Continued

**Vendor procedures,**  
continued

<b>Field Description</b>	<b>Action</b>
Description	Enter the detailed description of your item.
Case UPC	Enter the number on the outside of the case that identifies the item.
Item UPC	Enter the scannable code that identifies the item. Be sure to include all digits.
M/C Pk (Master Case Pack)	Enter the total number of retail selling units in a case.
Size	Enter the size of the item. Example: 12 oz., 5 lbs., etc.
List Case Cost	Enter the gross cost of a master case before any allowances or charges have been applied.
Case Allowances/Charges	Enter amounts to be considered in the cost of goods to lower the net cost. See the legend at the bottom of the <i>Publix Cost/Promotion Form</i> for a description of some individual allowances.
Special Packs	Enter a retail package type other than regular, if applicable. Examples: Prepriced, Off Label. See the legend at the bottom of the <i>Publix Cost/Promotion Form</i> for a description of some individual allowances.
Net Case Cost	Enter the master case cost after all allowances have been deducted.
Net Unit Cost	Enter the net cost of one retail selling unit.
Requested Performance	Enter the code for the suggested performance for which funds are being offered in box the under the allowance column.
Order Dates	Enter the dates the deals are available to buy for Warehouse or D.S.D. items. See the <i>Supplier Policies and Guidelines</i> for details.
Performance Dates	Enter the dates of suggested performance.
Vendor Promotion #	Enter the promotion number for this deal.
Extended Terms	Enter terms other than the standard terms for the vendor, if applicable (i.e. the number of days from the invoice date in which the invoice is to be paid, the amount of discount allowed if paid within the specified time period, etc.).

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## Publix Cost/Promotion Form Instructions, Continued

Vendor procedures,  
continued

Field Description	Action
Guaranteed Sale? (Y/N)	Check Yes or No to designate if this item is a guaranteed sale (i.e. If all merchandise is not sold, can it be returned?). <b>Note:</b> Any merchandise that is damaged or unsaleable is subject to return.
Holdback %	If there is a holdback %, enter the amount in this section.
Lump Sum Funds	Enter the amount of Lump Sum Funds given. Describe what the Lump Sum Funds are for in the Vendor Comments section.
Payment Method	<p>Check the box that indicates the method for receiving billback monies.</p> <ul style="list-style-type: none"> <li>• Immediate Deduction - billback monies are set up for immediate deduction.</li> <li>• Check mailed to - Check this option if a check made payable to Publix has been mailed to the Publix A/P Systems address and a copy of the check is attached to the <i>Publix Cost/Promotion Form</i>.</li> <li>• Billback Invoice - Check this option if an invoice should be generated by the Accounts Receivable Department and mailed to the address indicated. Enter the name and address that Publix should use for billing purposes. The payment terms are 30 days. If payment is not received within 30 days, the amount will be deducted.</li> </ul>
Vendor Comments	Enter additional comments. These should include a description of Lump Sum Funds performance.
Typed Name	Type the name of the person signing the <i>Publix Cost/Promotion Form</i> .
Sales Rep. Signature	Sign the <i>Publix Cost/Promotion Form</i> . <i>Publix Cost/Promotion Forms</i> must be signed or they will not be accepted by Publix. This must be the signature of the person presenting the <i>Publix Cost/Promotion Form</i> .

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## Publix Cost/Promotion Form Instructions, Continued

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**Buyer / Clerical procedures**

Follow the steps below to complete the **shaded areas** of the *Publix Cost/Promotion Form*. The information must be typed.

<b>Field Description</b>	<b>Action</b>
Date received by buyer	Enter the date the <i>Publix Cost / Promotion Form</i> is received
Initials	Enter your initials to verify receipt of the <i>Publix Cost / Promotion Form</i> .
Accounts Payable #	Enter the Accounts Payable Vendor Number assigned by Merchandise Accounting to process payment. This can be found on VR02 in PIMS.
Repk (Repack)	Enter the number of Publix shipping cases within a master case.
Case Allowances/Costs Entered in System	Circle the appropriate division(s), initial, and date the form when case allowances/costs (i.e. TOA, BBA, LUA, etc.) have been entered into the system.
Lump Sum Funds Entered in System	Circle the appropriate division(s), initial, and date the form when the lump sum funds (i.e. LPA) have been entered into the system.
Date Publix Cost/Promotion Form Copy Sent to A/R	Enter the date the copy was made and sent to Accounts Receivable to notify them of Lump Sum Funds, Payment Method, etc.
Ad Dates	Enter the date(s) Publix will run an ad, TPR, or in-store special.
Buyer Comments / Performance Agreed Upon	Enter additional comments and the performance that the buyer and the sales representative have agreed upon.

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