

Managing Instant Rebates from a Master Dealer in POS

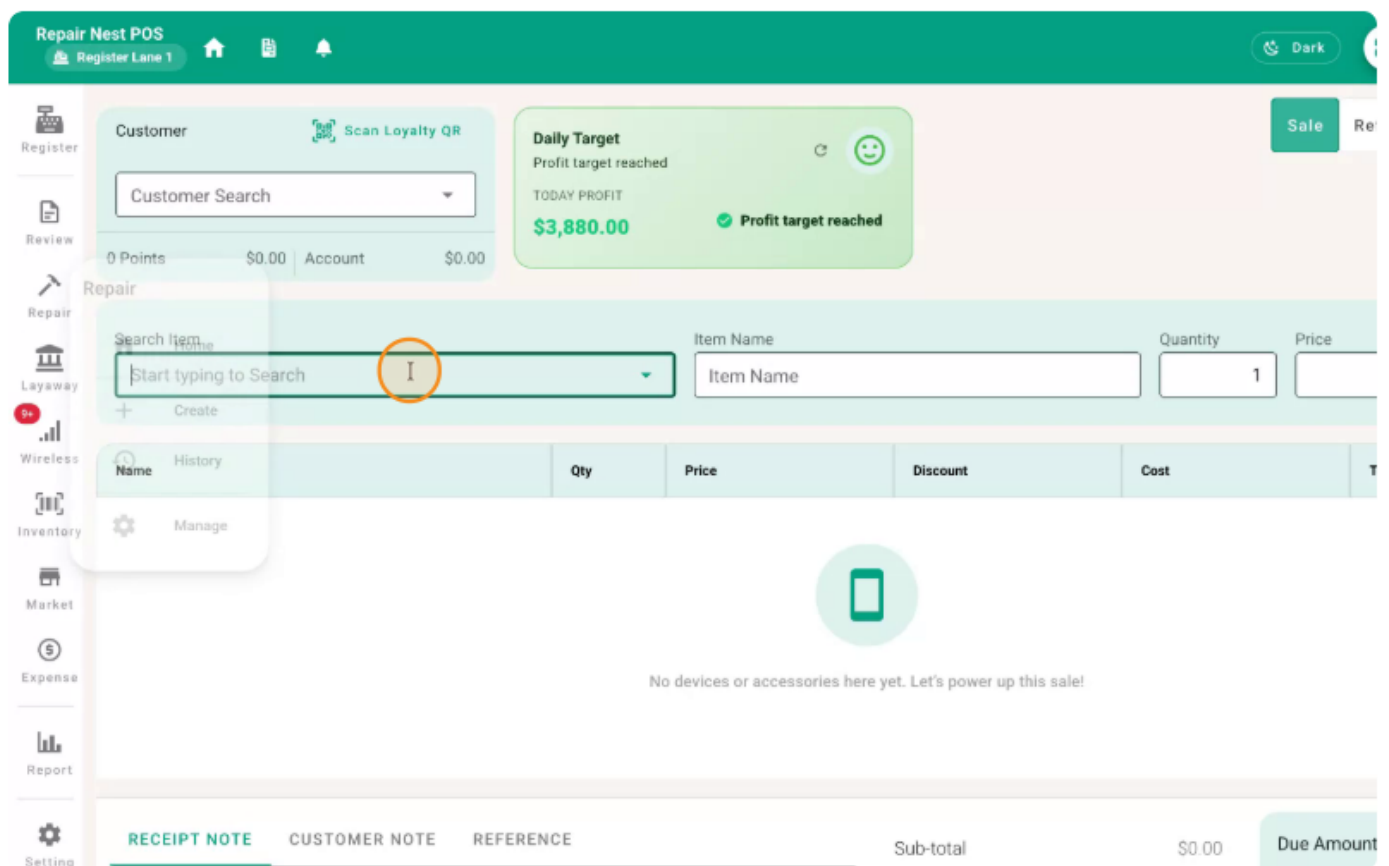
This process explains how to correctly record instant rebates offered by a master dealer in your POS system so that your sales, cost, and sales tax are accurate, and your receipt clearly shows the full phone price and the split between customer payment and instant rebate.

- [Step 1: Understand the Incorrect Way of Recording the Sale](#)
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Step 1: Understand the Incorrect Way of Recording the Sale

When you receive an instant rebate from a master dealer, they might say: you purchase the phone for \$1,200, but you must sell it for \$1,100 and let the customer pay only \$100.

If you sell the phone directly by scanning it in the normal way and processing it as a \$100 sale, your POS will record your cost as \$1,200 and your sale as \$100, showing a loss of \$1,100 and incorrect sales tax.



Repair Nest POS

Register Lane 1

Dark

Customer

Scan Loyalty QR

Customer Search

0 Points \$0.00 Account \$0.00

Daily Target

Profit target reached

TODAY PROFIT

\$3,880.00

Profit target reached

Search Item

Start typing to Search

Item Name

Quantity

Price

Item Name

1

Name	History	Qty	Price	Discount	Cost
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No devices or accessories here yet. Let's power up this sale!

RECEIPT NOTE

CUSTOMER NOTE

REFERENCE

Sub-total

\$0.00

Due Amount

Scan the phone in the regular sales screen.

Repair Nest POS

Register Lane 1

Dark

Customer

Customer Search

0 Points \$0.00

Search Item

Search Product

Name

RECEIPT NOTE

Setting

Register

Review

Repair

Layaway

Wireless

Inventory

Market

Expense

Report

Cancel

Save

Activation

Iphone 18

3256156165165482

Type

New Activation

Port-In

Bring Your Own Device

Phone Only

Upgrade

Standard

Line Type

Main

Additional

Activation Details

Phone Number

Carrier Search

Start typing to Search

\$10 plan

AT&T \$50

T Mobile

AT&T

Addons Search

Select **New Activation**.

Repair Nest POS

Register Lane 1

Dark

Customer

Customer Search

0 Points \$0.00

Search Item

Search Product

Name

RECEIPT NOTE

Setting

Register

Review

Repair

Layaway

Wireless

Inventory

Market

Expense

Report

Cancel

Save

Activation

Iphone 18

3256156165165482

Type

New Activation

Port-In

Bring Your Own Device

Phone Only

Upgrade

Standard

Line Type

Main

Additional

Activation Details

Phone Number

Carrier Search

Plans Search

Addons Search

Notes

Last Receipt: \$1,307.37 | Change: \$0.00 | Review

Enter the customer's phone number in the appropriate field.

Phone Only Upgrade Standard

Line Type

Main Additional

Activation Details

Phone Number 5162995555 Carrier Search

Plans Search Addons Search

Bill Payment

Add first month payment with this activation

Bill Payment Amount 0

Bill payment amount is required.

Cancel Save

\$0.00 Review

1500 Add

Total

Amount

\$0.00

Checkout

Continue the sale as usual.

New Activation Port-In Bring Your Own Device

Phone Only Upgrade Standard

Line Type

Main Additional

Activation Details

Phone Number 5162995555 Carrier Search

Plans Search Addons Search

Bill Payment

Add first month payment with this activation

Bill Payment Amount 0

Cancel Save

\$0.00 Review

1500 Add

Total

Amount

\$0.00

Checkout

If you then set the selling price here to **\$100**:

Customer

Scan Loyalty QR

Daily Target

Profit target reached

TODAY PROFIT

\$3,880.00

Profit target reached

Sale

Refund

Hold

Customer Search

Points \$0.00 | Account \$0.00

Search Item

Item Name

Quantity

Price

Search Product

Item Name

1

Name	Qty	Price	Discount	Cost	Total
Phone 18	1	1200	% 0	\$1,200.00	\$100.00

Item #193275

Serial #:3256156165165482

Activation Type: New Activation

Line Type: Main

RECEIPT NOTE

CUSTOMER NOTE

REFERENCE

Notes

Sub-total \$100.00

Discount \$0.00

Due Amount \$109.7

Your cost will still be \$1,200, and your sale will be \$100.

Customer

Scan Loyalty QR

Daily Target

Profit target reached

TODAY PROFIT

\$3,880.00

Profit target reached

Sale

Refund

Hold

Customer Search

Points \$0.00 | Account \$0.00

Search Item

Item Name

Quantity

Price

Start typing to Search

Item Name

1

Name	Qty	Price	Discount	Cost	Total
Phone 18	1	1500	% 0	\$1,200.00	\$1,500.00

Item #193275

Serial #:3256156165165482

Activation Type: New Activation

Line Type: Main

RECEIPT NOTE

CUSTOMER NOTE

REFERENCE

Notes

Sub-total \$1,500.00

Discount \$0.00

Tax Amount \$134.00

Due Amount \$1,634.00

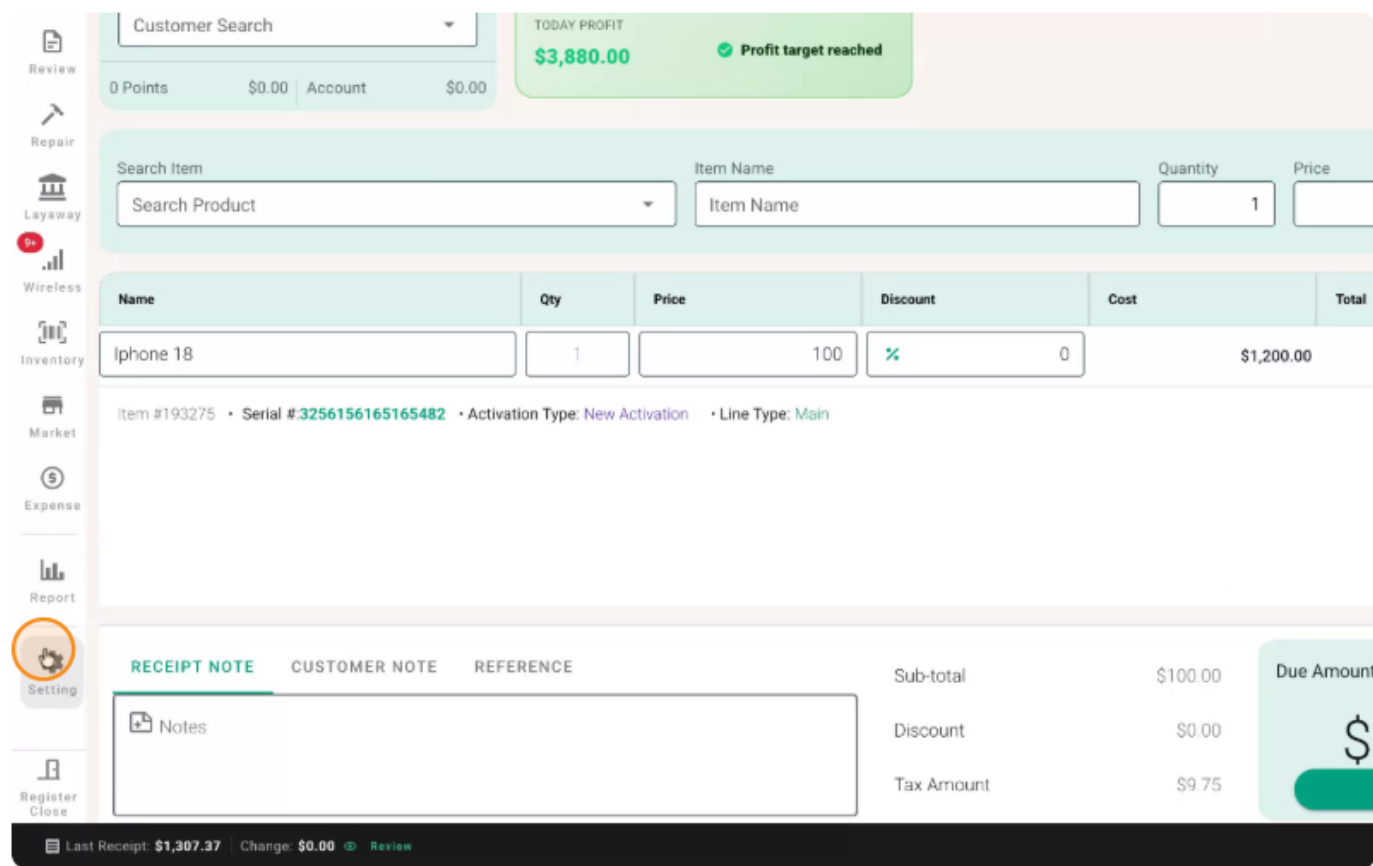
Checkout

This will show an \$1,100 loss and will not calculate sales tax correctly. Do **not** use this method for instant rebate transactions.

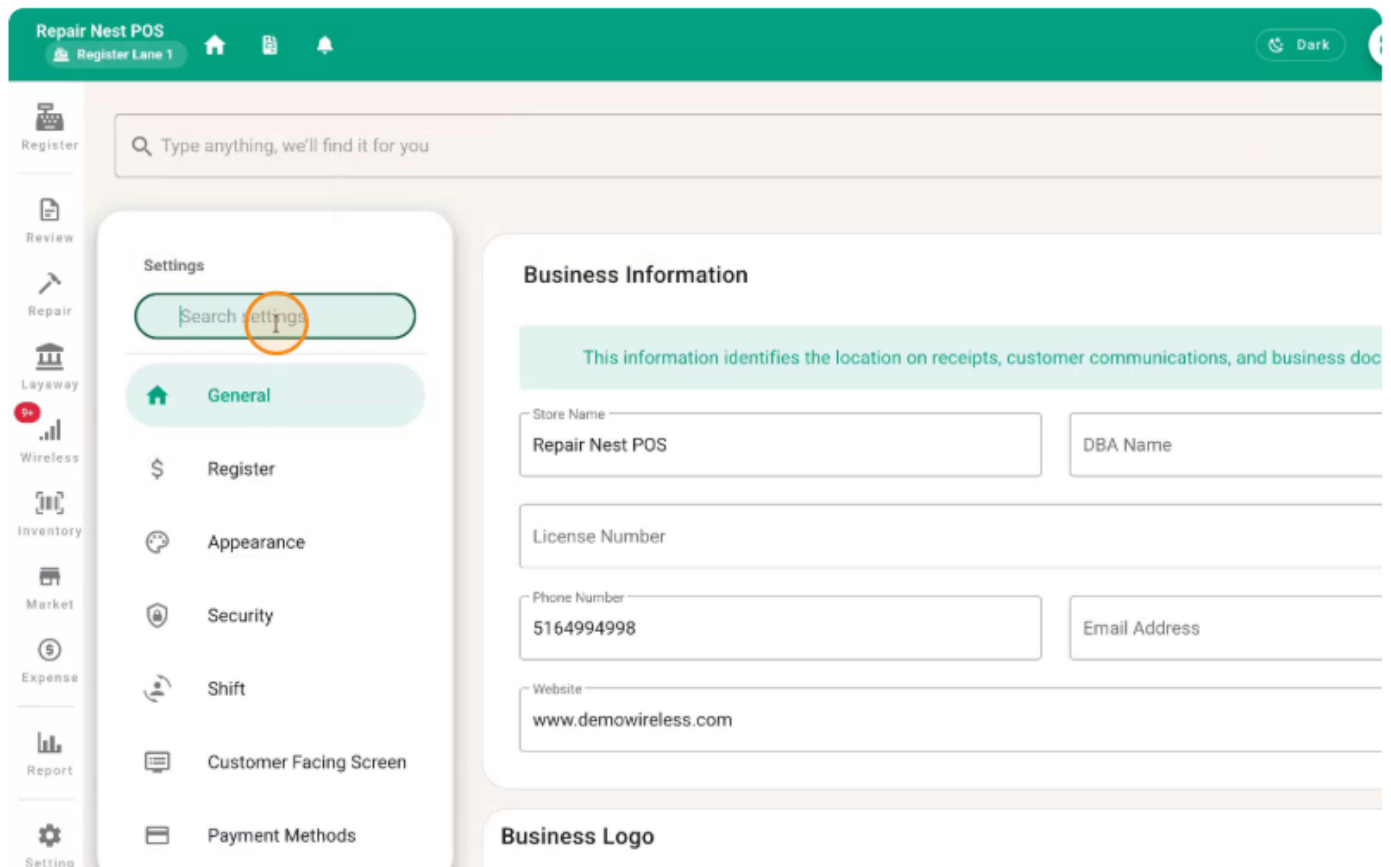
Step 2: Open Payment Method Settings

To handle instant rebates correctly, you must create and use a dedicated payment method called **Instant Rebate**.

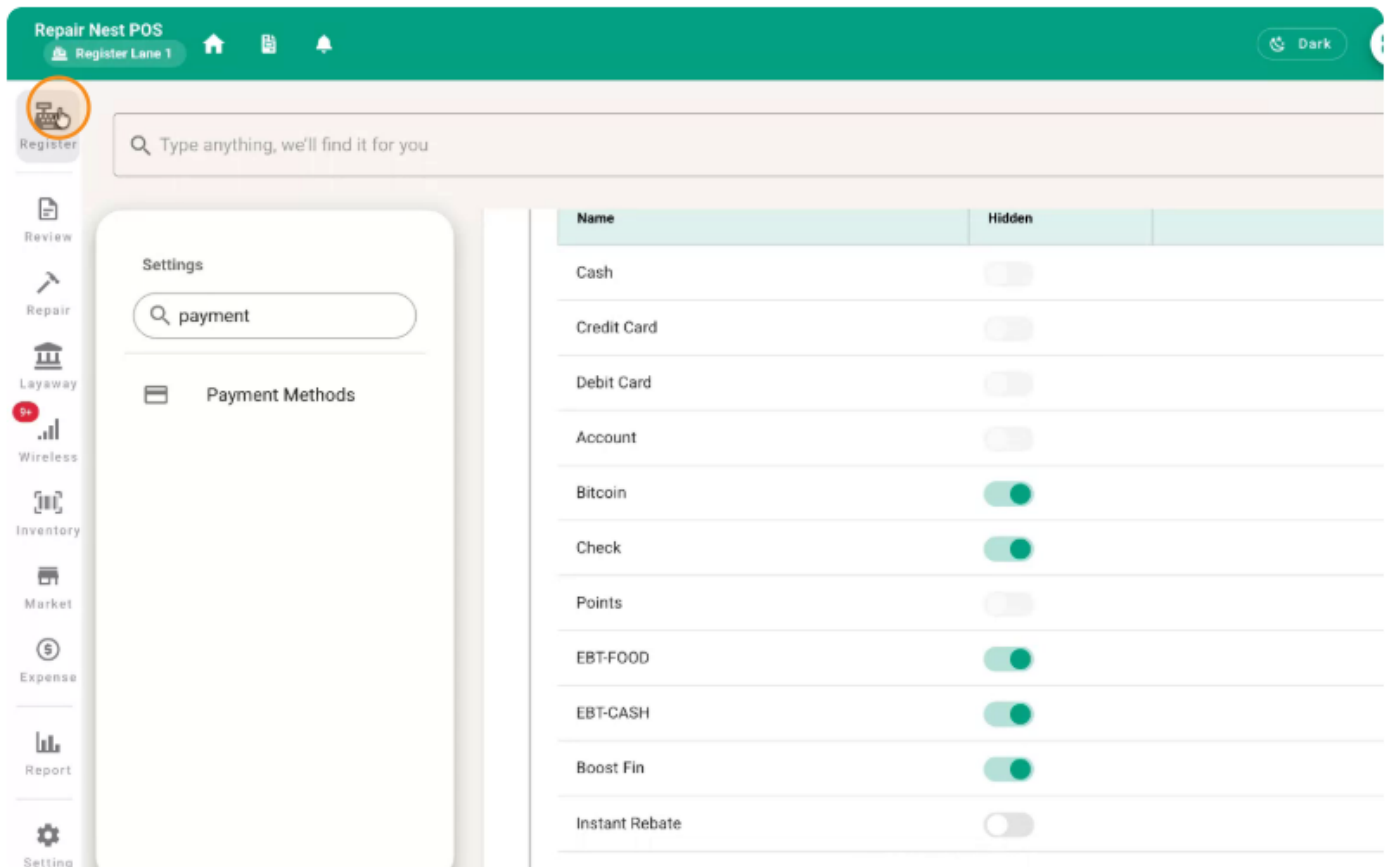
Go to your POS **Settings** menu.



In Settings, search for **Payment Method**.



Open the **Payment Method** configuration section.



Create a new payment method.

Name this payment method **Instant Rebate** (or a clear equivalent).

The screenshot shows the 'Nest POS' interface with a green header bar. On the left, a sidebar contains 'Settings' and 'Payment Methods'. The main area is titled 'Create Payment Method'. It features a search bar at the top with the placeholder 'Type anything, we'll find it for you'. Below this, the 'Name' field is highlighted with an orange circle and contains the letter 'I'. To the right of the 'Name' field is a 'Hidden' toggle switch, which is currently turned off, with the word 'Visible' next to it. The bottom right corner of the form has a small 'C' icon.

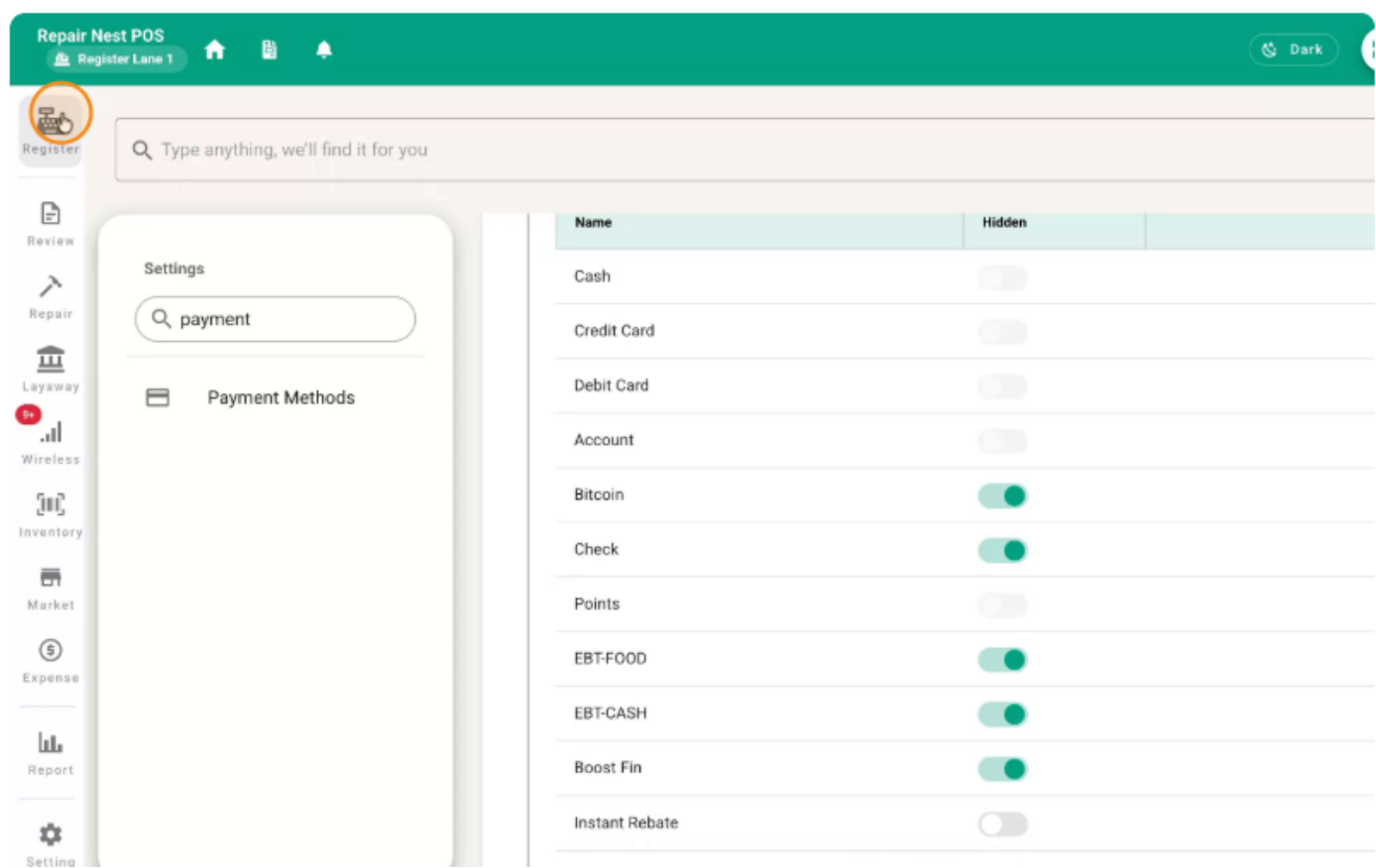
You should now see the newly created **Instant Rebate** payment method listed.

Confirm that the Instant Rebate payment method is active and available for use.

Step 3: Ring Up the Phone at Full Price

Now process the sale using the full price of the phone, not the discounted amount.

Go back to the sales screen and select the phone item again.



Instead of changing the item price to \$100, keep the price at the full **\$1,200**.

Customer

Scan Loyalty QR

Customer Search

Items: \$0.00 | Account: \$0.00

Daily Target

Profit target reached

TODAY PROFIT

\$3,880.00

Profit target reached

Sale

Refund

Hold

Search Item

Search Product

Item Name

Item Name

Quantity

1

Price

Item	Qty	Price	Discount	Cost	Total
Item 18	1	1200	% 0	\$1,200.00	\$100.00

#193275 • Serial #:3256156165165482 • Activation Type: New Activation • Line Type: Main

RECEIPT NOTE

CUSTOMER NOTE

REFERENCE

Notes

Sub-total

\$100.00

Discount

\$0.00

Due Amount

\$109.7

Ensure the line item shows **\$1,200** as the selling price.

Account

\$0.00

TODAY PROFIT

\$3,880.00

Profit target reached

Item Name

Item Name

Quantity

1

Price

0

Add

Item	Qty	Price	Discount	Cost	Total
	1	1200	% 0	\$1,200.00	\$1,200.00

#3256156165165482 • Activation Type: New Activation • Line Type: Main

CUSTOMER NOTE

REFERENCE

Sub-total

\$1,200.00

Discount

\$0.00

Tax Amount

\$107.37

Due Amount

\$1,307.37

Checkout

\$0.00

Review

Proceed to **Checkout** with the full price.

Account\$0.00

TODAY PROFIT
\$3,880.00
✔ Profit target reached

Item Name

Quantity

Price

Add

Item Name

1

0

	Qty	Price	Discount	Cost	Total	
	1	1200	0	\$1,200.00	\$1,200.00	 

#3256156165165482 • Activation Type: New Activation • Line Type: Main

CUSTOMER NOTE REFERENCE

Sub-total\$1,200.00

Discount\$0.00

Tax Amount\$107.37

Due Amount

\$1,307.37

Checkout

\$0.00  Review

At checkout, you will now apply the instant rebate using the payment method you created.

Step 4: Apply the Instant Rebate as a Payment Method

When you are on the checkout/payment screen, decide how much of the total will be covered by the instant rebate and how much will be paid by the customer.

Click to proceed with payment.

The screenshot displays a payment interface with a total amount of \$1,307.37 at the top. On the left, the 'Quick Cash' section offers buttons for 'Paid in full \$1,307.37' and various dollar amounts from \$1,308.00 to \$1,400.00. The central 'Payment Methods' grid includes options for Cash, Credit Card, Debit Card, Account, Points, and Instant Rebate, with the latter being highlighted. To the right, a 'Payment' summary section lists 'Item Count', 'Sub - Total', 'Discounts', 'Tax Amount', and 'Total Payment'. A 'Get Signature' button is located below the summary. At the bottom, there are buttons for 'Save Open Invoice' and 'Coupon', along with a unique identifier 'd31a1187-cc90-40b6-9afe-d7beca714305'. The footer shows 'Last Receipt: \$1,307.37', 'Change: \$0.00', and a 'Review' link.

Enter the **Instant Rebate** amount you will receive from the master dealer.

For example, if you receive \$1,100 as an instant rebate, enter **\$1,100** as payment under the **Instant Rebate** method.

Click **Save** to apply this payment.

The screenshot shows a payment interface with a total amount of \$1,307.37. A modal titled "Pay With Instant Rebate" is open, allowing the user to specify an amount to be paid by the customer. The modal includes a text input field labeled "Amount" with the value "1100" entered. Below the input field are "Cancel" and "Save" buttons. The "Save" button is highlighted with an orange circle. In the background, the "Payment Methods" section shows "Cash", "Debit Card", and "Points". The "Payment" section shows "Item Count" as 1. A table lists items with their prices: \$1,200.00, \$0.00, \$107.37, and \$0.00. At the bottom, there is a "Coupon" section, a "Get Signature" button, and "Save Estimate" and "Save" buttons.

Item Count	Price
1	\$1,200.00
	\$0.00
	\$107.37
	\$0.00

The remaining balance will be paid by the customer (e.g., \$100 by cash/card).

Alternatively, if you prefer to take the tax impact on yourself, you can set it so that the customer pays only \$100 total, and the rest of the amount (including the tax portion you choose) is covered by the Instant Rebate payment method.

In that case, you can specify that **\$100** will be paid by the customer, and the rest of the balance will be assigned to **Instant Rebate**.

Repair Nest POS

Dark

Checkout

\$1,307.37

Quick Cash

Paid in full
\$1,307.37

\$1,308.00

\$1,310.00

\$1,320.00

\$1,350.00

\$1,400.00

Payment Methods

Cash

Credit Card

Debit Card

Account

Points

Instant Rebate

Payment

Item Count

Sub - Total

Discounts

Tax Amount

Total Payment

Get Signature

Enter the remaining amount as **Instant Rebate**.

\$1,307.37

Payment Methods

Cash

Debit Card

Points

Instant Rebate

Payment

Item Count	1
	\$1,200.00
	\$0.00
	\$107.37
	\$0.00

Get Signature

Pay With Cash

Amount

100

Cancel Save

Coupon

d31a1187-cc90-40b6-9afe-d7baca714305

Save Estimate Save

\$0.00 Review

For example, if the remaining amount comes to **\$1,207**, that full amount is assigned to the **Instant Rebate** payment method.

\$1,307.37

Quick Cash

Paid in full
\$1,307.37

\$1,308.00

\$1,310.00

\$1,320.00

\$1,350.00

\$1,400.00

Payment Methods

Cash

Credit Card

Debit Card

Account

Points

Instant Rebate

Payment

Item Count

Sub - Total

Discounts

Tax Amount

Total Payment

Get Signature

Save Open Invoice

Coupon

Last Receipt: \$1,307.37

Change: \$0.00

Review

Confirm the total Instant Rebate amount (e.g., \$1,207) and complete the payment.

\$1,207.37

Payment Methods

Cash

Debit Card

Points

Instant Rebate

Payment

Item Count	1
	\$1,200.00
	\$0.00
	\$107.37
	\$100.00
Total Payment	\$100.00

Get Signature

Pay With Instant Rebate

Amount: 1207.37

Cancel Save

Coupon

d31a1187-cc9d-40b6-9afe-d7baca714305

Save Estimate Save

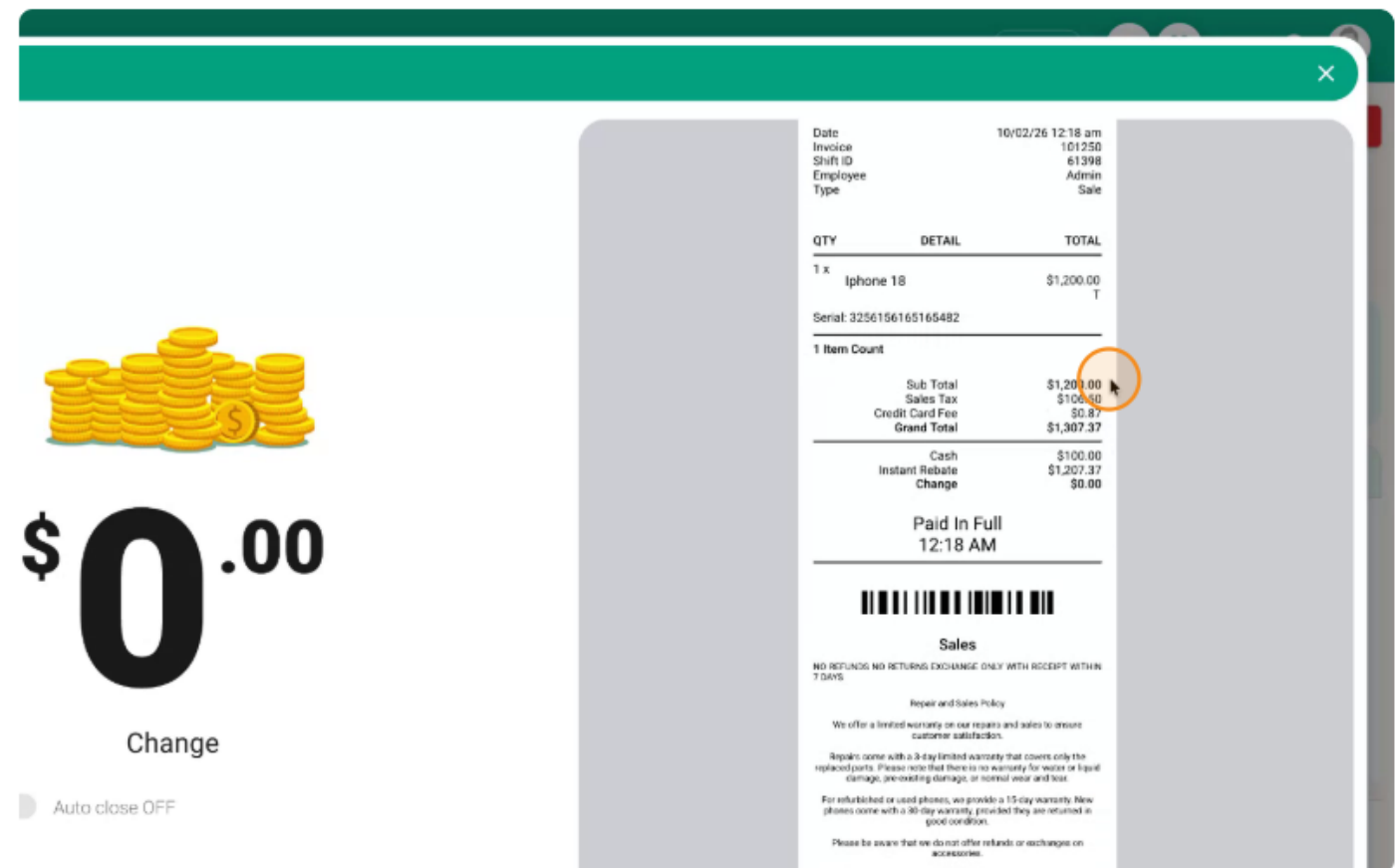
\$0.00 Review

Save the transaction to finalize the sale.

Step 5: Review the Receipt and Recordkeeping

Once you save the transaction, your receipt will display the correct full price, tax, and payment breakdown.

The receipt will show the phone's total price as **\$1,200**.



The customer will see a \$1,200 item price, the correct sales tax amount, and a clear split of who paid what:

- Customer payment (e.g., \$100 via cash/card)
- Instant Rebate (e.g., \$1,100 or \$1,207) as a separate payment method

This ensures your sales, cost, and tax records are accurate, and the master dealer's instant rebate is properly documented in your POS.