

## Step-by-Step Procedure

### Applying a Rebate to an Account

In **Account Gateway**, locate the account the rebate will be applied to.

Under **Other Billing Items**, click on **Rebates**.

Click the **Add** icon.

The **Rebate ID** is assigned by NorthStar. It is the next available sequential Rebate ID number.

Select the **Rebate Policy ID** to add to the account (tree, appliance, etc.).

Enter the **Quantity** of rebates to be applied.

*Note: In the example, the customer planted 2 trees so the quantity entered is 2.*

The **Amount** defaults to the amount from the Rebate Setup table.

Click **OK** to save.

Account Gateway > Other Billing Items > Rebates

The screenshot shows a software window titled "Customer Rebate (BROWSE)". The window has a standard toolbar with icons for search, home, back, forward, refresh, and buttons for "OK", "Cancel", and "Revoke". Below the toolbar, there are tabs for "Rebates" and "Details", with "Details" selected. The main area is titled "Rebate Details" and contains a form with the following fields:

Rebate Id:	301			
Rebate Policy:	1	P	TREE REBATE	SHADE TREE REBATE
Quantity	2	Max allowed:		Per Account
Amount:	50.00	Max amount:	150.00	

The form fields are highlighted with a red border. At the bottom left of the window, there is a "Ready" status indicator.

The **Rebate History** table updates to show the number of rebates applied to the account.

*Note: A unique Rebate ID is assigned to each rebate applied to an account.*

*The example shown has two (2) tree rebates for \$50 each. The assigned Rebate IDs are 301 and 302.*

*Note: Once a rebate has been applied, it may not be deleted. To remove a rebate, follow the Revoking a Rebate process.*

The screenshot displays two windows from the 'Customer Rebate (BROWSE)' application. The top window, titled 'Customer Rebate (BROWSE)', shows the 'Rebate Details' for a specific rebate. The details include:
 

- Rebate ID: 301
- Rebate Policy: 1 (selected from a dropdown menu)
- Quantity: 2
- Amount: 50.00
- Max allowed: (empty field)
- Max amount: 150.00
- Rebate Name: TREE REBATE (with a button labeled 'SHADE TREE REBATE')

 The bottom window, titled 'Rebate History (BROWSE)', shows a table of applied rebates. The table has the following columns: Rebate Id, Rebate Policy Id, Date, Amount, Revoked Rebate Id, Customer, and Created By. Two rows are visible:
 

Rebate Id	Rebate Policy Id	Date	Amount	Revoked Rebate Id	Customer	Created By
302	1	2019-06-05 15:30	50.00		6212	aenfelt
301	1	2019-06-05 15:30	50.00		6212	aenfelt