

# Groups



There are 3 kinds of groups in SMRT; General, Master Billing, and Credit Subs. The sub-accounts of these groups have different billing setups.

## **General**

A General group is a grouping of accounts that all pay for their own orders. General groups are used for special pricing, group discounts, building delivery stops, segmenting customer sales within a business, and several other reasons as well.

**Master Billing** 

Help

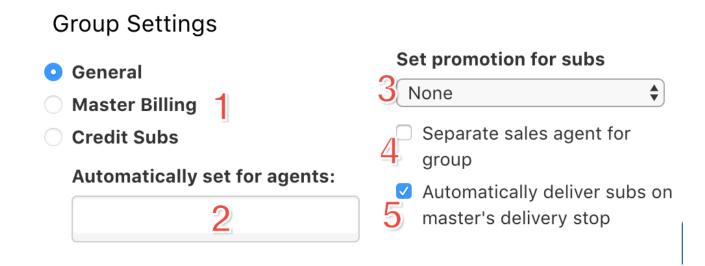
A Master Billing group is used when you have numerous accounts that will all be billed to one master account. Frequent examples are corporate clients, government agencies, and hotel staff.

#### **Credit Subs**

A Credit Subs group is used when there's a group of accounts that are given a monthly allotment of free cleaning. If a sub-account spends more than their allotted amount they are responsible for paying the remaining balance.

# **Group Settings**

There are several additional settings that a group can have.



**1.** Group Type Setting: Used to specify the type of group.

- **2.** Automatically set for agents allows you to specify any agents that a group should automatically be linked to. For example, if a specific route has discounted prices
- **3.** Set promotion for subs allows you to specify a promotion that all sub-accounts should automatically receive.
- **4.** The Separate sales agent for the group checkbox creates a separate agent for the group. Use this setting when you want to report specifically on the sales, piece counts, etc for the group.
- **5.** Automatically deliver subs on master's delivery stops means that all the sub-accounts orders will have their orders delivered or picked up via the master account. An example of when this should be selected is when you have a building where you deliver everything to a single location.

If you would like any help setting up a group please feel free to contact support. We're happy to help with a scenario and when you're creating a group for the first time it's better to be safe than sorry.



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