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# Groups



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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.

### Group Settings

☒ **General**

☐ **Master Billing** 1

☐ **Credit Subs**

**Automatically set for agents:**

 2

### Set promotion for subs

3

4 ☐ Separate sales agent for group

5 ☒ Automatically deliver subs on master's delivery stop

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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