


# Broker Group Setup

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**Pathway:** Setup > Account > Broker Group

**Broker Group Setup** allows you to create and manage broker groups, which can be assigned to accounts categorized under the 'Broker' account class.



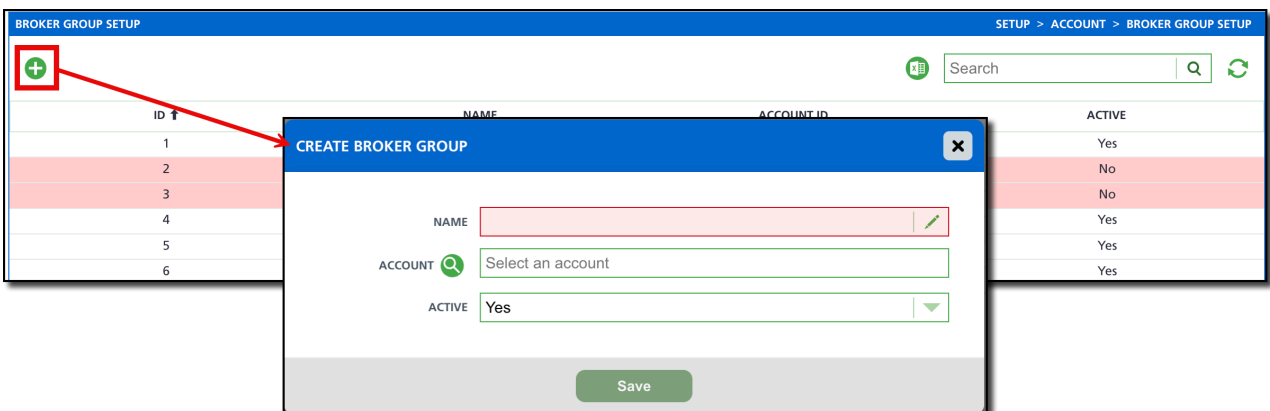
ID	NAME	ACCOUNT ID	ACTIVE
1	BrokerGroup1	49154	Yes
2	BrokerGroup A	49534	No
3	Broker Group B		No
4	Broker Group C	49261	No
5	The Broker Group		Yes
11	Broker Group 2	18931	Yes
12	Broker Group 3	18557	Yes
13	Bob's Broker Group	19502	Yes
14	PGISFYA	49627	No
15	Waste Management		Yes

## Field Descriptions

Field	Description
<b>ID</b>	The unique system assigned identification number for a broker group.
<b>Name</b> <i>Required</i>	The name of the group that is used populate the Broker Group field in the Edit Account screen.
<b>Account ID</b>	The broker account ID linked to the broker group.
<b>Active</b>	Controls if the Broker Group is available for selection when adding an account/site.

## Add a Broker Group

To add a Broker Group, use the following steps. Once created and active, it will be available for selection in drop-downs and filters within the system.



The screenshot shows the 'BROKER GROUP SETUP' interface. A red box highlights a green '+' icon in the top left corner of the table. A red arrow points from this icon to a 'CREATE BROKER GROUP' modal window. The modal window contains the following fields:

- NAME:** A text input field with a red border.
- ACCOUNT:** A dropdown menu with a magnifying glass icon and the text 'Select an account'.
- ACTIVE:** A dropdown menu with 'Yes' selected.
- Save:** A green button at the bottom of the modal.

1. Click the **green +** icon to open the *Create Broker Group* screen.
2. Enter a unique and descriptive **Name** for the broker group.
3. Search for a previously created **Account** the broker group applies to.

- The **Active** field is populated by default to "Yes."  
Select "No" to make it inactive. When set to inactive, the broker group will not be displayed in the system.
- Click **Save** to finish.

## Edit a Broker Group

To edit an existing Broker Group or make it active/inactive, use the following steps.

The screenshot shows the 'BROKER GROUP SETUP' interface. At the top, there is a breadcrumb trail: 'SETUP > ACCOUNT > BROKER GROUP SETUP'. Below this is a search bar and a refresh icon. The main area contains a table with the following columns: ID, NAME, ACCOUNT ID, and ACTIVE. The table has five rows. The second row (ID 2) is highlighted in red. A red callout box with an arrow points to this row, containing the text 'Double Click row to open update'. An 'UPDATE BROKER GROUP' modal form is open over the table. The form has three fields: 'NAME' (text input with 'test31'), 'ACCOUNT' (dropdown menu with 'Select an account'), and 'ACTIVE' (dropdown menu with 'No'). A 'Save' button is at the bottom of the modal.

ID ↑	NAME	ACCOUNT ID	ACTIVE
1	BrokerGroup1	49154	Yes
2	Test	49534	No
3	test31		No
4			Yes
5			Yes

- Double-click the row of the **Broker Group** to modify. This opens the *Update Broker Group* screen.
- Edit the **Name** or change the **Account**.
- Select 'No' to make this Broker Group inactive or 'Yes' to make it **Active**.
- Click **Save** to save changes..

## Criteria for Using Broker Groups

There are two conditions that must be met for Broker Group to be displayed in the Add or Edit Account screens.

- System Configuration:** In *Setup > System > System Options > Account [tab]*, the field '**Require Broker Group For Broker Account Class Type**' field is set to "Yes."

The screenshot shows the 'SYSTEM OPTIONS SETUP' interface. At the top, there is a breadcrumb trail: 'SETUP > SYSTEM > SYSTEM OPTIONS'. Below this is a tabbed interface with tabs for 'System', 'Sales', 'Integration', 'Account', 'Operations', 'Customer Portal', 'Intercompany / Broker', and 'Online Order'. The 'Account' tab is selected and highlighted with a red box. The main area contains a grid of configuration options. The option 'REQUIRE BROKER GROUP FOR BROKER ACCOUNT CLASS TYPE' is highlighted in yellow and has a dropdown menu set to 'Yes'.

System	Sales	Integration	Account	Operations	Customer Portal	Intercompany / Broker	Online Order
THRESHOLD DISCOUNT LAB TEST ID				CREDIT HOLD NOTIFICATION TEMPLATE	Acct Notify Template		
API GRAVITY LAB TEST ID				ENABLE ONLINE SIGNATURE MESSAGING	No		
SPECIFIC GRAVITY LAB TEST ID				LIMIT PAYMENT BATCH TO SINGLE DIVISION	No		
ENABLE SITE BILLING ADDRESS	Yes			LIMIT BILL GROUP TO SINGLE DIVISION	No		
ENABLE SITE BILL GROUP	Yes			DISABLE AUTO PAY DAY OF MONTH	No		
ENABLE AGING BY SITE	No			ACCOUNT AND SITE DIVISION MUST MATCH	No		
ENABLE SERVICING YARD SEGMENTATION	Yes			SMS DEFAULT TASK TYPE	Customer Support		
SERVICES GRID DEFAULT VIEW	Standard			SMS UNKNOWN USER RESPONSE			
DEFAULT GENERATOR TYPE	Small Quantity Generator						
CREDIT HOLD REASON CODE	Credit Hold						
VACATION HOLD REASON CODE	Vacation Hold						
AUDITOR ACCOUNT LABEL							
WRITE OFF CHARGE CODE	test						
REQUIRE SITE SOURCE	No						
REQUIRE BROKER GROUP FOR BROKER ACCOUNT CLASS TYPE	Yes						

- The account's **Account Class** field must be set to "**Broker.**" When these two criteria are met, the Broker Group field is displayed.

**EDIT ACCOUNT**

Account Settings

NAME: Katie Test Customer

NAME 2:

ADDRESS LINE 1: 1234 Test Rd

ADDRESS LINE 2:

CITY/STATE/POSTAL CODE: Houston TX 77887

PHONE: (201) 555-0123

ATTN:

BILLING PHONE: (201) 555-0123

FAX: (201) 555-0123

BILLING CONTACT 1: Katie Test Customer (KatieTest@noemail.cor)

BILLING CONTACT 2:

PARENT ACCOUNT:

STATUS: Active

DIVISION: HOUSTON

SOURCE: Call In

ACCOUNT MANAGER: Aliena Somers - Admin-NS (Sales)

ACCOUNT CLASS: BROKER

BROKER GROUP: BrokerGroup1

AUDITOR:

COLLECTION TYPE:

WEBSITE:

LOGO: Select logo... BROWSE...

OLD ID:

ERP ID:

SAVE

## Application of Broker Groups

After a broker group has been set up, it can be used when adding or editing an account, given the account class is set to Broker.

**EDIT ACCOUNT**

Account Settings

NAME: Example Account 1

NAME 2:

ADDRESS LINE 1: 1234 W Valley Blvd

ADDRESS LINE 2:

CITY/STATE/POSTAL CODE: San Gabriel CA 91776-3

PHONE: (201) 555-0123

ATTN:

BILLING PHONE: (201) 555-0123

FAX: (201) 555-0123

BILLING CONTACT 1:

BILLING CONTACT 2:

PARENT ACCOUNT:

STATUS: Active

DIVISION: QAWASTE

SOURCE: Call In

ACCOUNT MANAGER: House Account - House Account (Sales)

ACCOUNT CLASS: BROKER

BROKER GROUP: The Broker

AUDITOR: UR Broker

COLLECTION TYPE: Bob's Broker Group

WEBSITE: ABC Broker

LOGO: Best Broker

UPLOADED LOGO: Waste Management

OLD ID:

ERP ID:

SAVE

## Related Articles

[Create Account: Screen Field Descriptions](#)

