

Broker Group Setup

Last Modified on 08/16/2024 10:54 am EDT

Pathway: Setup > Account > Broker Group

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

ID	NAME	ACCOUNT
1	BrokerGroup1	49154
2	Test	18553

Broker Group Setup Field Descriptions

Field	Description
ID	The unique group identification number.
Name	Displays the name of the group that is used populate the Broker Group field in the Edit Account screen.
Account	The broker account linked to the broker group.

Add a New Broker Group

The screenshot shows the 'ADD BROKER GROUP' popup window with the following fields:

- NAME:
- ACCOUNT:
- SAVE:

Add Broker Group

1. Click the add icon to open the 'Add Broker Group' popup.
2. Complete the following *Required* fields:
 - Enter a **Name** the broker group.

- Search for a previously created broker **Account** the broker group applies to.
3. Click **Save** to finish.

Add a Broker Group to an Account

After a broker group has been created, it will be available for selection in the Edit Account screen. For this field to display the following requirements must be met:

- In *Setup > System > System Options*, under the Account tab, the 'Require Broker Group For Broker Account Class Type' field must be set to "Yes."
- In Add/Edit Account, the Account Class selected must be "Broker."

The screenshot shows the 'EDIT ACCOUNT' interface with the 'Settings' tab selected. The 'ACCOUNT CLASS' dropdown is highlighted with a red box and set to 'BROKER'. The 'BROKER GROUP' dropdown is set to 'Test'. Other fields include NAME (Best Broker), ADDRESS LINE 1 (77 Willoughby Ave), CITY/STATE/POSTAL CODE (Los Angeles, CA, 90038-2), PHONE ((818) 239-0186), BILLING PHONE ((999) 999-9999), and FAX ((999) 999-9999). A 'SAVE' button is at the bottom.

Field	Value
NAME	Best Broker
NAME 2	
ADDRESS LINE 1	77 Willoughby Ave
ADDRESS LINE 2	
CITY/STATE/POSTAL CODE	Los Angeles CA 90038-2
PHONE	(818) 239-0186
ATTN	
BILLING PHONE	(999) 999-9999
FAX	(999) 999-9999
BILLING CONTACT 1	
BILLING CONTACT 2	
PARENT ACCOUNT	
STATUS	Active
DIVISION	QAWASTE
SOURCE	Call In
ACCOUNT MANAGER	House Acct non System
ACCOUNT CLASS	BROKER
BROKER GROUP	Test
COLLECTION AGENT	
WEBSITE	
LOGO	Select logo... BROWSE...
OLD ID	