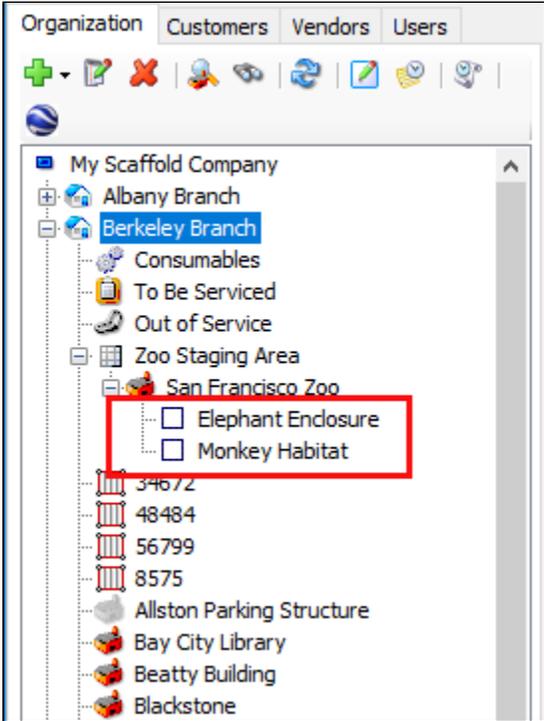


Working with Groups



A Group () is a job site underneath a parent Job Site. It has all of the same features, functions and options as the parent Job Site, the only difference being that it is a child location of a Job Site. This is primarily used for organizational or billing purposes.

This page contains the following:

- [Why Choose a Group vs. a Job Site](#)
- [Parent Job Site](#)
- [Adding a Group](#)

Why Choose a Group vs. a Job Site

You can use Groups to divide or differentiate information for a single job or general location. For example, use them to separate inventory at a job. You can also use Groups to identify and bill different customers working at the same job. Alternately, you can use them to bill (or not bill) the same customer differently for portions of inventory at a job.

Parent Job Site

When a Job Site has child Groups, both the parent Job Site and Groups function as Job Sites, receiving direct shipments and generating location-specific invoices. Reporting, product quantities and grid views for the parent Job Site include records and quantities from the child Groups.

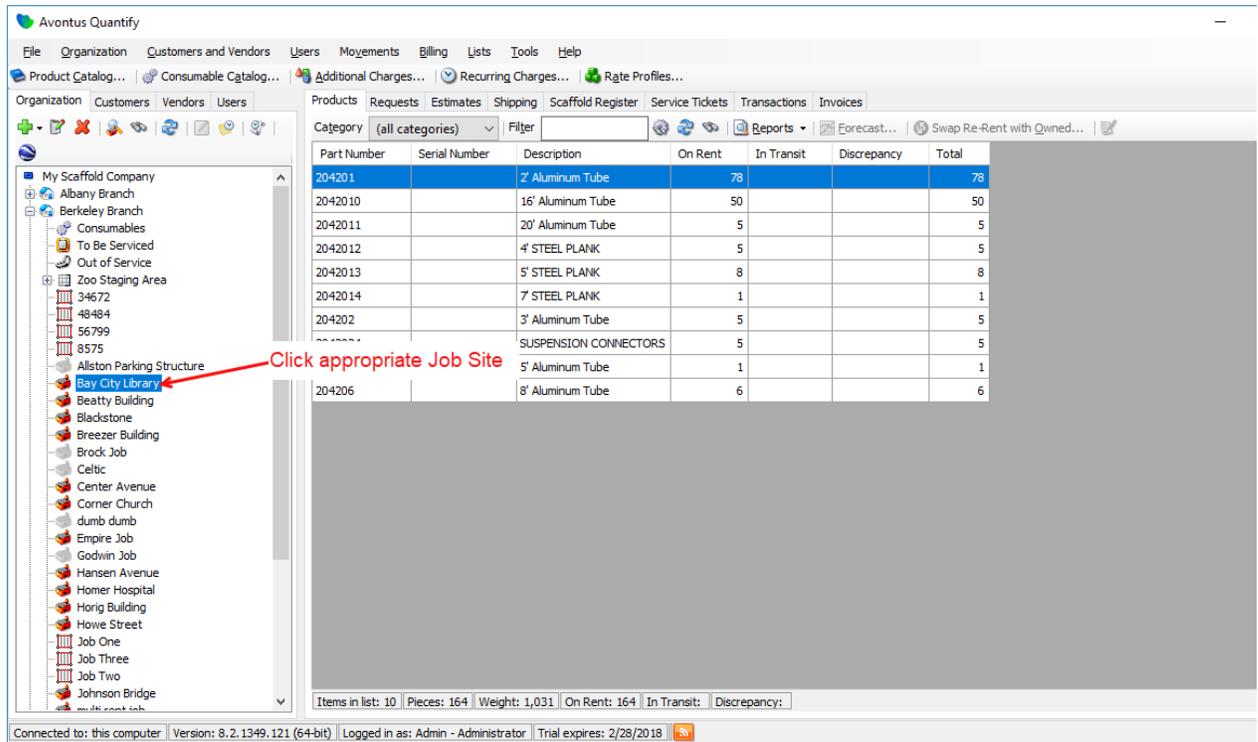
Adding a Group

You can only add a Group to a Job Site.

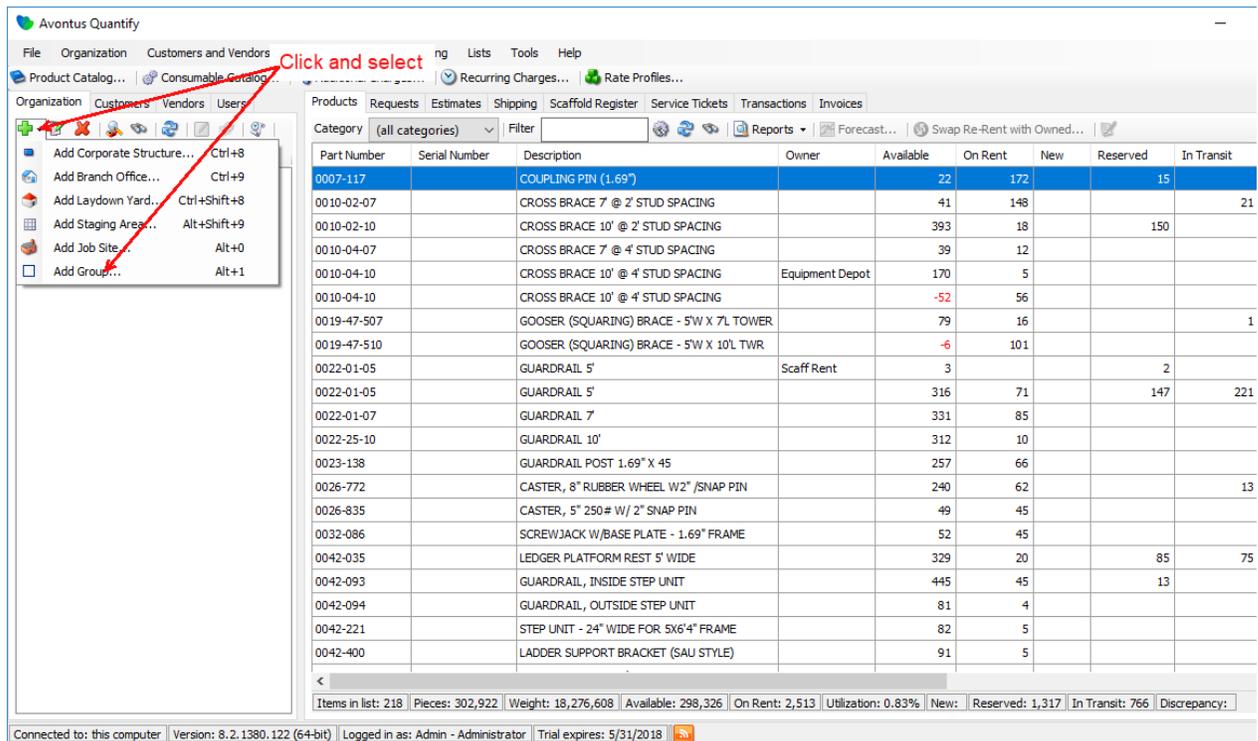
Note: For more information, refer to [Adding a Job Site](#) and other [Job Site](#) help articles

To add a Group:

1. Click the appropriate Job Site.



2. Click the **Add** button () and select **Add Group** from the dropdown that appears.



The *Group* dialog appears. The default required fields for a Group include:

- **Group Name**
- **Customer**
- If the Group is Billable, **Billing Method** details and **Rate Profile**

Required field information will default from the Parent Job Site, but can be changed if desired.

3. Click in the **Group Name** text field and enter the name of the new group.

4. As necessary, click the Customer dropdown and select the appropriate customer.

Group

General Scaffolds Billing Security Group Properties Shipment Properties Requests

Active

Group name

Click and enter

Shipping... address

Customer

Posey Builders

Dates

Start End

Product history

Include this location in product history pivot

Rate profile to use (select)

Group number

ID in accounting software

Receiving options

Hide quantities on 'Return Pick Ticket' and non-detailed shipment reports in 'To Be Received' status for this group

For transfers, require counting of equipment when received by this group

For deliveries, require counting of equipment when received by this group

Description

OK Cancel

4. Click the **Billing** tab.

The *Group* dialog refreshes.

5. Click the **First Invoice Date** calendar icon()

Group

General Scaffolds **Billing** Security Shipment Properties Requests

This group is billable

Billing method Rent Options

Arrears
 First invoice date 

First advance, then arrears
 Minimum days rent
 Allow override of minimum days from rate profile when specified
 Include additional charges and consumables on minimum invoices

Advance
 Issue credits for early returns
 Minimum days rent
 Invoice cycle days
 Cycle invoicing to a common date
 Cycle start date

Billing cycle for Arrears and First Advance, then Arrears

Daily
 Invoice every days

Monthly

 Day of month

Current billing cycle

Next cycle end date 

 Overriding the next cycle end date is only available in arrears, specific day, after billing has occurred.

 OK Cancel

The calendar appears

Select Date 

February 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	1	2	3
4	5	6	7	8	9	10

Today: 2/8/2018

6. Locate and click the appropriate date.

7. Click **OK** when you are ready to save the new Group.

