

## Tech Tip Tuesday— August 18, 2015

by David Hirsch

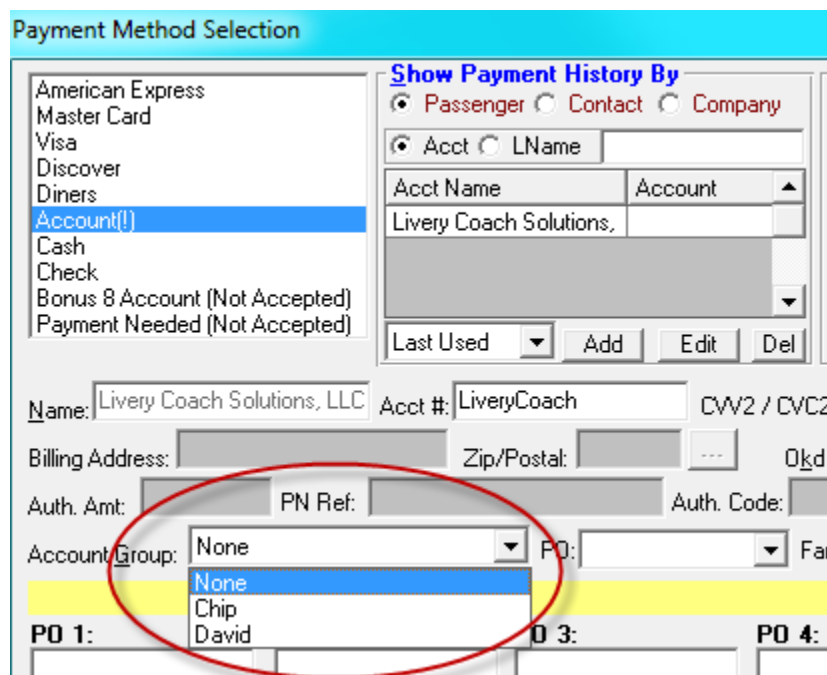
### Assigning Group Billing to Contact(s)

Last week we discussed how to make the group billing selection mandatory for a billing account.

But sometimes, you may have a billing account with several different billing groups, and the billing group always follows the booker—that is, each booker has a different, specific, billing group that he or she always uses.

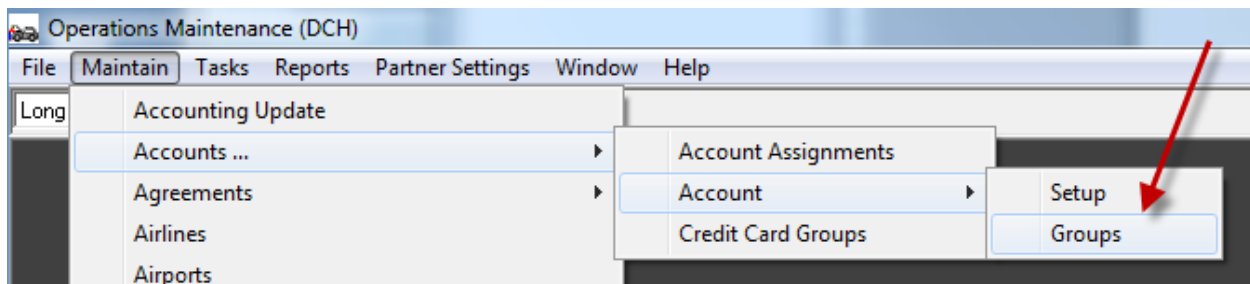
In this case, you don't have to remember to pick the proper billing group for each trip—you can assign the appropriate billing group to the contact, and then it is selected automatically.

For our example, we have set up a billing account (Livery Coach) with two billing groups (David and Chip). Before we do any assignment, you can see that when David books a trip, both billing groups are available.

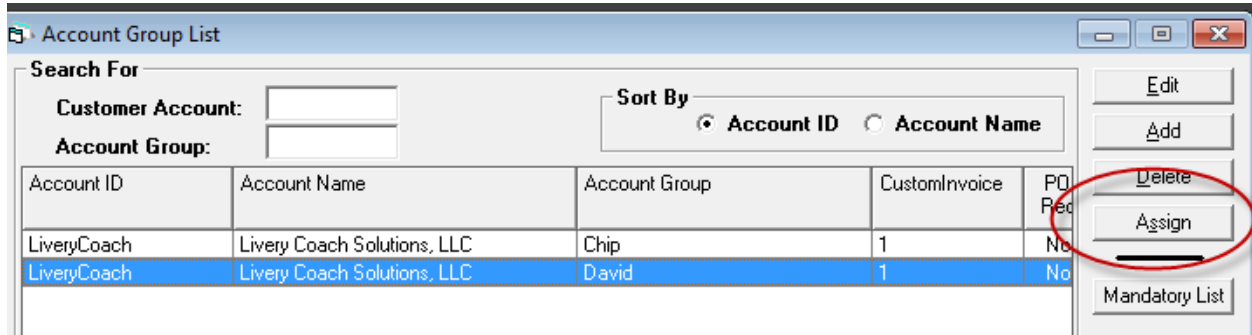


The screenshot shows the "Payment Method Selection" window. On the left, a list of payment methods includes American Express, Master Card, Visa, Discover, Diners, Account(!), Cash, Check, Bonus 8 Account (Not Accepted), and Payment Needed (Not Accepted). On the right, the "Show Payment History By" section has radio buttons for Passenger (selected), Contact, and Company, and a dropdown for Acct (selected) or LName. Below this is a table with columns "Acct Name" and "Account", showing "Livery Coach Solutions,". At the bottom, the "Account Group" dropdown is open, showing options: None (selected), Chip, and David. A red circle highlights this dropdown menu.

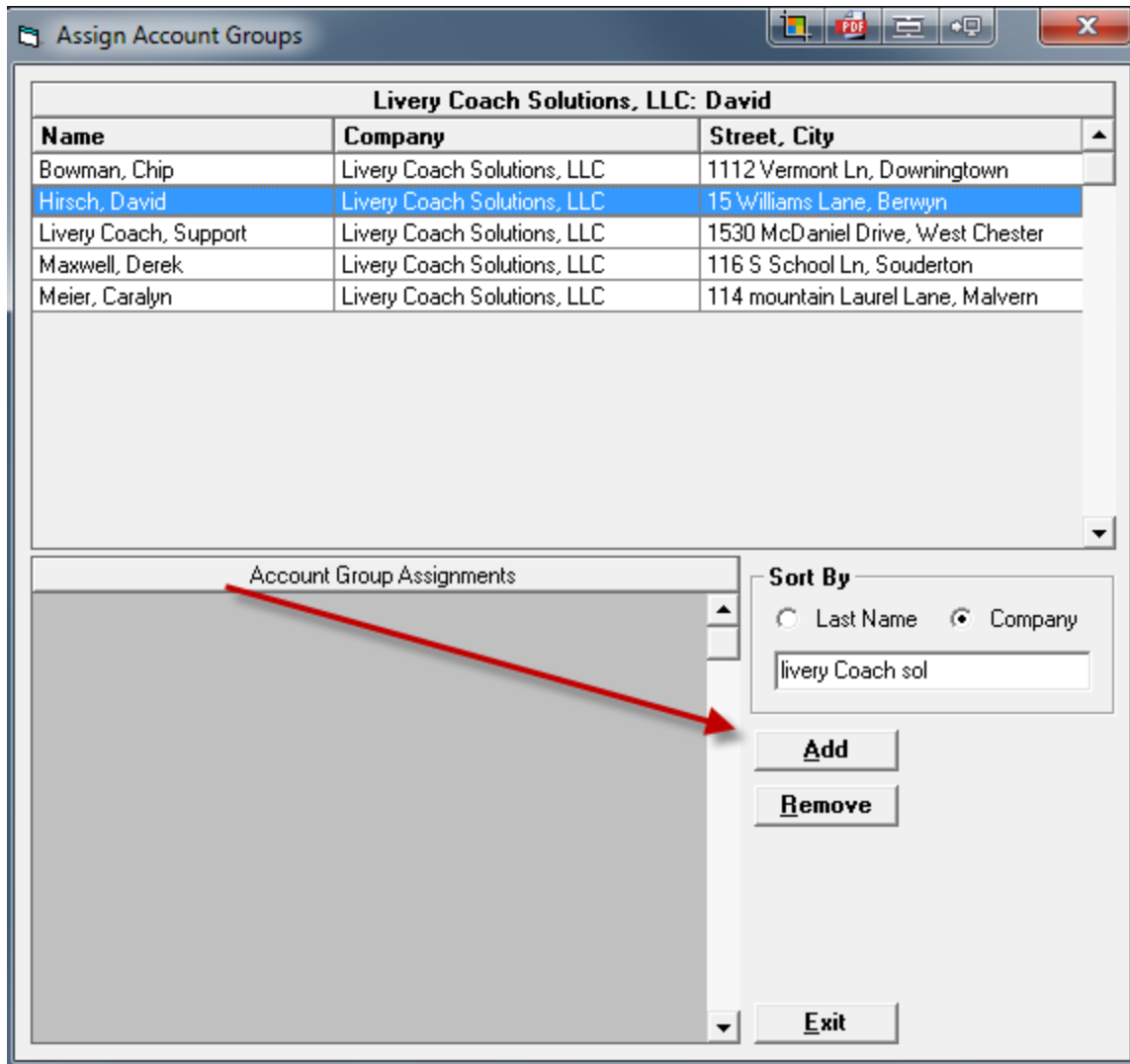
To assign the "David" billing group to David, we simply navigate in Maintenance to Maintain...Accounts...Account...Groups.



Select the desired line, and click on the “Assign” button.



You can then use the “Sort By” field to narrow down your contact record selection. Select the contact you want to assign, and then click Add. The selected contact will move from the top window to the bottom window.



Assign Account Groups

Livery Coach Solutions, LLC: David		
Name	Company	Street, City
Bowman, Chip	Livery Coach Solutions, LLC	1112 Vermont Ln, Downingtown
Livery Coach, Support	Livery Coach Solutions, LLC	1530 McDaniel Drive, West Chester
Maxwell, Derek	Livery Coach Solutions, LLC	116 S School Ln, Souderton
Meier, Caralyn	Livery Coach Solutions, LLC	114 mountain Laurel Lane, Malvern

Account Group Assignments

Contact: Hirsch, David - Livery Coach Solutions, LLC

Sort By

Last Name  Company

livery Coach sol

Add

Remove

Exit

Now, when David books a trip, the only billing account group available is the one assigned to him.

Payment Method Selection

[Show Payment History](#)

Passenger  Conta

Acct  LName

Acct Name: Livery Coach Solutions,

Last Used: [dropdown] Add

Name: Livery Coach Solutions, LLC Acct #: LiveryCoach

Billing Address: [text] Zip/Postal: [text]

Auth. Amt: [text] PN Ref: [text]

Account Group: None [dropdown]

PO 1: [text] PO 2: [text] PO 3: [text]

Account Group dropdown options: None, David

When this feature is used in conjunction with the Mandatory button discussed last week, using account groups can be fast and easy—you don't have to remember to pick one, or even which one to pick. The system will handle this for you.