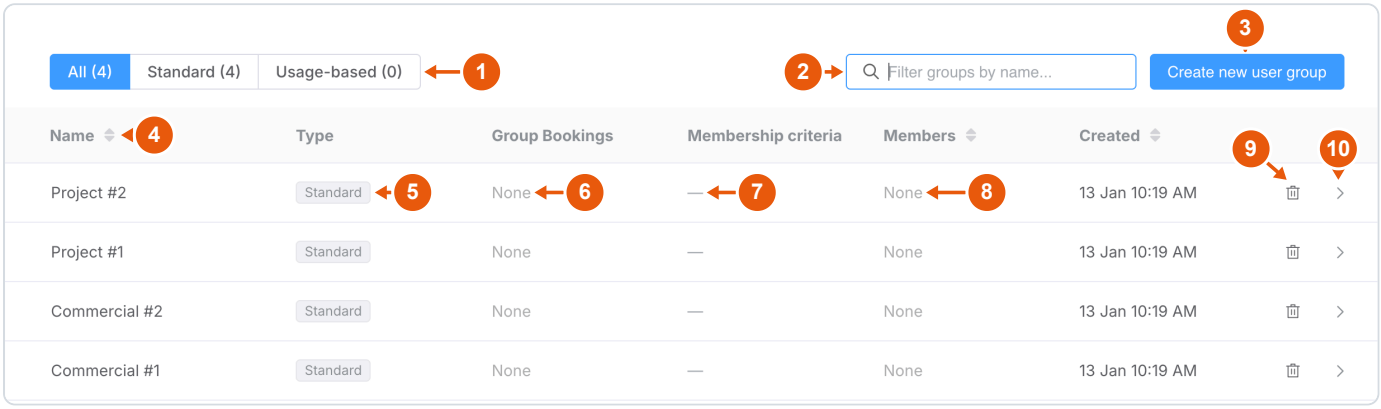
Groups: Quick Guide

Yellowbox Partner Dashboard, sidebar > **Groups**. Put people into groups to share a team locker, give them access to certain types of locker, or reward frequent users with extra locker types.

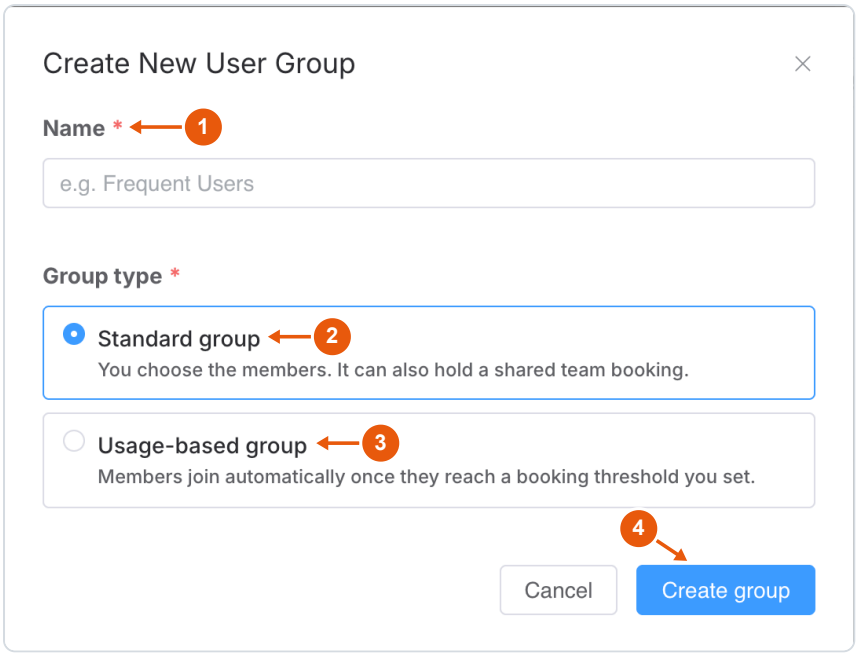
Group type	How people join	Use it for
Standard	You add and remove members yourself.	A fixed team or a hand-picked set of people. It can hold a shared team booking and give members access to particular locker types.
Usage-based	People join automatically once they make enough bookings in a period you set.	Rewarding regular users: members can then book extra (promoted) locker types.

The groups list



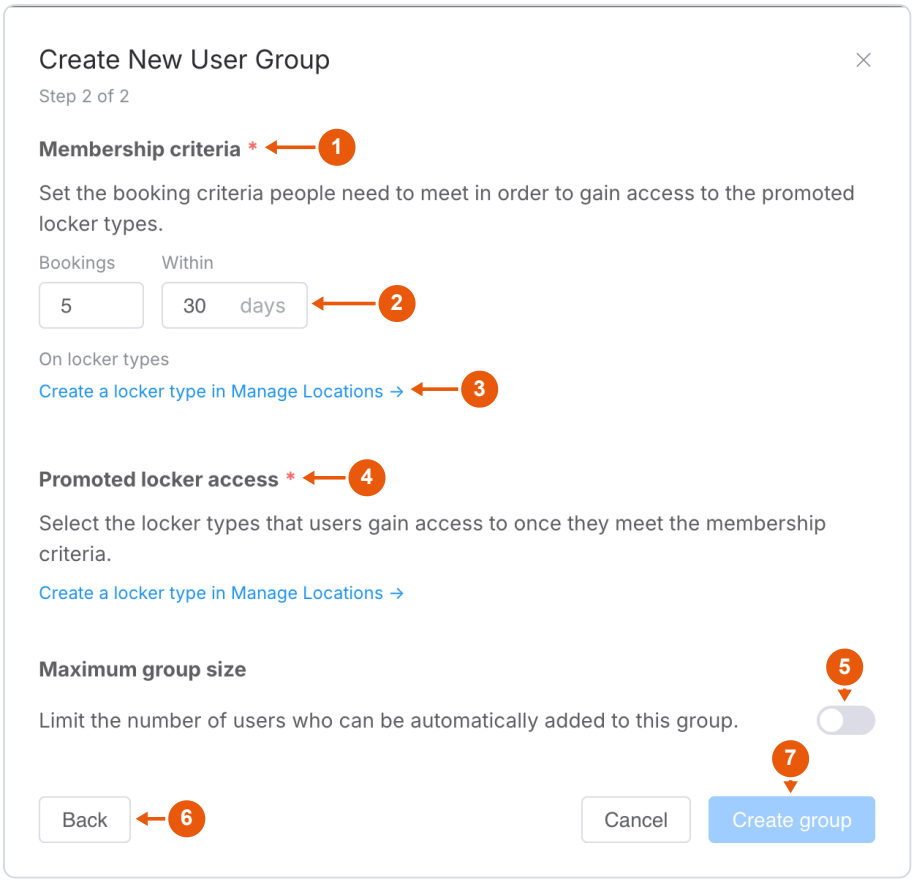
1. Show **All** groups, only **Standard** or only **Usage-based**. The number is how many of each.
2. **Filter groups by name**.
3. **Create new user group** (next page). Needs permission to manage users.
4. Click a heading with arrows to sort. Newest groups are listed first.
5. **Type**: Standard or Usage-based.
6. **Group Bookings**: lockers booked for the whole group.
7. **Membership criteria**: for a usage-based group, how many bookings someone needs to join.
8. **Members**: who is in the group.
9. The bin deletes the group. If the group is used on the **Manager Access** page, you are warned first: its members lose the manager role or locations it gave them.
10. The arrow (or anywhere on the row) opens the group's settings (see "A standard group's settings").

Create a group



1. **Name** the group, for example *Frequent Users*.
2. **Standard group**: you choose the members.
3. **Usage-based group**: people join automatically. Choosing this adds a second step (below).
4. **Create group** (or **Next** for a usage-based group).

Usage-based group, step 2

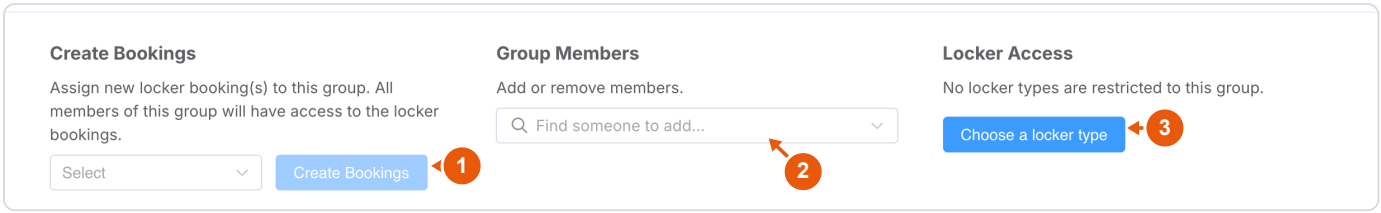


1. **Membership criteria**: what someone must do to join.
2. **Bookings** and **Within**: for example 5 bookings within 30 days.
3. **On locker types**: which kinds of locker count towards those bookings.
4. **Promoted locker access**: the extra locker types members can book once they join.
5. **Maximum group size**: turn on to cap how many people can join automatically.
6. **Back** returns to step 1.
7. **Create group** stays grey until the criteria and promoted locker types are filled in.

Seeing "Create a locker type in Manage Locations"? Usage-based groups work with locker types, so you need at least one first. Create them on the **Manage Locations** page.

A standard group's settings

Click a group to open it. Changes here apply straight away.



1. **Create Bookings**: in **Select**, pick a location and one or more lockers, then click **Create Bookings**. Every member can use those lockers. An orange number warns that a locker is already booked.
2. **Group Members**: search for a person to add them. Remove someone from the list below.
3. **Locker Access**: **Choose a locker type** so that members can book lockers of that type.

Bookings already made for the group are listed under **Existing Bookings**.

A usage-based group's settings

- **Membership Criteria**: the pen changes the number of bookings, the period and the locker types that count. Click **Save criteria**.
- **Maximum group size** and **Group size limit**: cap how many people can join. You are warned if the limit is higher than the number of lockers of the promoted types (some members might find none free), or lower than the current number of members (they stay, but no one new joins until there is room).
- **Promoted locker access**: the locker types members gain. Until one is chosen, members gain nothing extra and the page warns you.
- **Group Members**: who has qualified so far. You can still add or remove someone by hand.

Tips

- **Add one person to a group** from the **Users** page too: open the person and use *Search groups to add*.
- **Groups and manager roles:** the **Manager Access** page can link a group to a manager role or set of locations. Removing someone from that group, or deleting it, takes those away.
- **Need help?** Use the **Support** page or contact Yellowbox at contact@yellowbox.app.

Screenshots use sample data.