How to create third-party accounts

Third-party accounts allow users to bill transactions to entities that exist outside of the organisation. Reports can then be generated that show the costs billed to the accounts. These reports can be used to recover costs from third parties.

Third party accounts can be placed in different account groups if an extra reporting level is required. Also, new account defaults can be specified on account groups such as variable pricing, opening balance, and minimum balance enforcement. When new accounts are added, they will inherit these settings.

How to create an account group

Skip this section if you would like to leave all accounts in the **Default Account Group** already existing.

- Open Resource Manager.
- Navigate to **Account Management** > **Account Groups**.
- On the right hand side, click the **Add** button.
- Specify a name for the account group.
- Edit the new account defaults on the Account Defaults tab if required.
- Click **OK**.

Create a third party account

- Open Resource Manager.
- Navigate to **Account Management** > **Accounts**.
- On the right hand side, click the **Add** button.
- In the **New Account** window, enter a descriptive name for the account in the **Account Name** text box. Note that this is not the code that will be entered in the popups.
- Choose the Account Group into which the account will be added.
- Click **OK**.
- Enter an **Account Code** for this account. This is the code that must be entered into the popup window for prints or phone calls.
- Click **OK**.

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