

# How to specify access to individual accounts for a user or Group

If a user is configured to require an Account Code for transactions, they will be able to bill prints/copies/scans/faxes/phone calls to third party accounts (or indeed other users' accounts if their access rights allow it). By default users have access to all accounts apart from user or Group accounts. However, we can specify access to specific accounts in order to stop certain users from billing accounts to which they shouldn't have access.

There are two ways this can be done. It can be done for each specific user record, or it can be done on the Group. When it is done on the Group it does not immediately apply to all users within the Group. It becomes a 'new user default' for the Group. New users added to the Group will inherit the account access setting. However, you will always be able to apply the setting to all current members of the Group if you like.

## Set the individual account access for specific users

- Open Resource Manager.
- Navigate to **User Management > Users**.
- Double click on a user (or multi-select more than one user and click the **Edit** button).
- Click the **Account Access** tab.
- In the **Account Access** frame, choose the option **Access to individual Accounts**.
- Tick the relevant accounts to which the user will be able to bill transactions.
- Click **OK**.

## Set the account access for a Group

- Open Resource Manager.
- Navigate to **User Management > Groups**.
- Double click the Group that requires the setting (or multi-select more than one Group and click the **Edit** button).
- Click the **Account Defaults** tab.
- In the **Access to Account Codes** frame, choose the option **Access to individual Accounts**.
- Tick the relevant accounts to which the Group will be able to bill transactions.
- If you would like to apply this setting to all current members of the Group, click the **Go** button at the bottom of the **Account Defaults** tab.
- Click **OK**.

## Refresh PDServers and PDAgents

Now that the popup setting has been changed, the PDServers and PDAgents will see the new settings the next time they refresh from the database. By default, this happens every 10 minutes. To force a refresh immediately follow these steps:

- On the left, click the **PD Servers** node.
- On the right, highlight all the servers. Right click and choose **Refresh**.

- Now click the **PD Agents** node.
- On the right, highlight all the servers. Right click and choose **Refresh**.

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