How to enable the account billing popup for a user or Department

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). When they print they will either get a popup on their workstation, or if the PDAgent is not installed, they can enter the Account Code to be billed at the printer when they release their jobs. If phone tracking is enabled, they will get a popup as soon as they hang up their phone.

There are two ways this can be enabled. It can be enabled on each specific user record, or it can be enabled on the Department. When it is enabled on the Department it does not immediately cause all users within the Department to receive the popup. It becomes a 'new user default' for the Department. New users added to the Department will inherit this setting. This means you could have exceptions within the Department of users who don't need the popup. However, you will always be able to apply the setting to all current members of the Department if you like.

Ensure the PDAgent is installed on the user's workstation

To receive the popup request after printing (or phone call), the PDAgent must be installed on the user's workstation. Use the PDAgentInstaller.msi file on the Print Director CD to install it and connect it to the database.

Enable the popup for a specific user or users

- Open Resource Manager.
- Navigate to **User Management** > **Users.**
- Double click the user who requires the setting (or multi-select more than one user and click the **Edit** button).
- Click the **Billing** tab.
- In the **Account billing settings** frame, choose the option **Require account code**. If more than one user was selected, tick the checkbox next to the frame to enable it before changing the setting.
- Click **OK**.

Enable the popup for a Department

- Open Resource Manager.
- Navigate to **User Management** > **Departments.**
- Double click the Department that requires the setting (or multi-select more than one Department and click the **Edit** button).
- Click the **Billing** tab.
- In the **Account billing settings** frame, choose the option **Require account code**. If more than one user was selected, tick the checkbox next to the frame to enable it before changing the setting.
- If you would like to apply this setting to all current members of the Department, click the **Go** button at the bottom of the **Billing** 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**.

Document revision date: 2019/12/11
Software version: 2.2.53.0