How to deposit funds into a user's account

- Open Resource Manager.
- Navigate to **User Management** > **Users**.
- On the right hand side, double click on the user.
- Click the **User Account Balance** tab (**General** tab).
- Take note of the **Enforce minimum balance** tick box. If the user's credit is limited, this must be ticked. When it is ticked, they will be able to print/copy as long as they have funds in their account. If it is unticked, their balance is not enforced and it will be allowed to fall below the minimum balance (normally zero).
- Take note of the value in the **Minimum Balance** text box. This is usually **0.00**. When the user's current balance meets this minimum balance they will not be able to perform further prints or copies (if **Enforce minimum balance** is ticked).
- To deposit funds into the user's account, click **Add Transaction.**
- In the **Add Transaction** window, you have three options: **Credit (Deposit), Debit (Withdrawal)** and **Set to balance**.
    - **Credit**: If you choose this option, the amount entered will be deposited into the account.
    - **Debit**: If you choose this option, the amount entered will be withdrawn from the account.
    - **Set to balance**: If you choose this option, either a debit or a credit will take place in order to set the account to the balance entered.
- Click **OK**.

Check the user's Auto-bill account

All transactions (print/copy/scan/fax/phone) in Print Director are billed to Accounts. All users have their own User Accounts and all Departments have Departments Accounts. PD Pro customers can also set up other Accounts for matters (legal) or projects (architectural, engineering). These users would get a popup when they print that would request the Account to which the transaction must be billed.

Users that are configured **not** to get the popup will have their transactions billed to their **Auto-bill Account**. By default, this is their User Account. However, this may not always be the case. Some sites change the auto-bill account to the Department Account. This allows the customer to open a report **Grouped by Account** that would show the transactions for each Department. This offers the following advantage over the **Grouped by Department** report: If a user is moved between Departments in the middle of the month, their transactions prior to moving will be listed under their previous Department in the report. The **Grouped by Department** report will only group data based on the user's current membership at that point in time. Thus all their transactions will appear under their new Department.

PD Pro customers can also set a user's auto-bill account to another Account (not necessarily their User Account or Department Account). An example would be a law firm whose conveyancers always bill to the same matter code. Instead of them having to enter a code in a popup on every print (like the litigators), their auto-bill account can be set to a general conveyancing account and the popup can be disabled.

To check the auto-bill account:

- Open Resource Manager.
- Navigate to **User Management** > **Users**.
- On the right hand side, double click on the user.
- Click the **Billing** tab.

- Take note of the option chosen in the **Account billing settings** frame. If either R**equire account code** or **Require account and matter codes** options are selected, then the user will get a popup on print. In this case, the auto-bill account is only used for transactions where the account is not required (e.g. on copiers where the Account requirement is set to Optional). If it is set to **No client popup – auto bill** or **Popup invoice only – auto bill** then the auto-bill account is always used.
- Click the **Auto-bill account** tab.
- Take note of the auto-bill account chosen and change it if necessary.

Refresh PDServers and PDAgents

Changes to account balances do not require any refresh of the background services. This is because they are checked on every transaction. If however, the auto-bill account was changed then a refresh will be required. By default, this happens automatically 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**.