How to create third-party accounts

Third-party accounts let users bill printing, copying, scanning, faxing and phone calls to someone outside the organisation, for example a client, matter or project. Reports of what was billed to each account can then be used to recover the costs (see *How to report on transactions for third party accounts*).

Accounts belong to **account groups**. A group gives reports an extra level, and sets defaults for the accounts added to it, such as an opening balance, minimum balance and variable pricing. If you do not need groups, use the **Default Account Group**.

Create an account group (optional)

1. Open Resource Manager.
2. In the tree, click **Account Management** > **Account Groups**, then click **Add**.
3. On the **General** tab, enter the **Account Group Name**.
4. On the **Account Defaults** tab, set the defaults for new accounts in this group if needed.
5. Click **OK**.

Create an account

1. In the tree, click **Account Management** > **Accounts**, then click **Add**.
2. In the **New Account** window, choose the **Account Group**, enter the **Account Name** (a descriptive name, not the code users enter), and click **OK**.
3. In the **Account** window, enter the **Account Code**. This is the code users enter in the billing popup, or at the printer, to bill this account.
4. Click **OK**.

To let users choose accounts when they print, see *How to enable the account billing popup for a user or Department*.

Related articles

- *How to enable the account billing popup for a user or Department*
- *How to specify access to individual accounts for a user or Department*
- *How to add credit to a third-party account*
- *How to specify variable pricing on accounts*

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