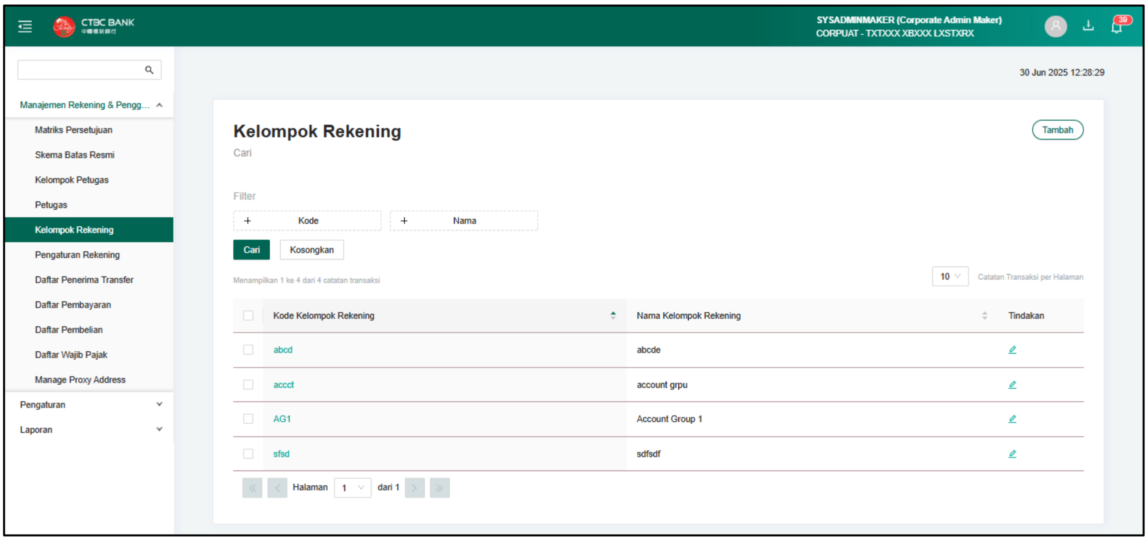
1. Account Groups

This menu is used to determine the list of accounts accessible to company officers. Groups are attached to a specific Officer Group. Therefore, officers within that Officer Group can only use the accounts listed within that Account Group. Account Groups also manage products to determine which accounts can be used for which products, so not all accounts can be used for all transactions. The system will validate the Account Groups of the logged-in company officer and the product access granted to each account. For example, if an account is only granted for In-Bank Transfers, that account cannot be used for purchases.

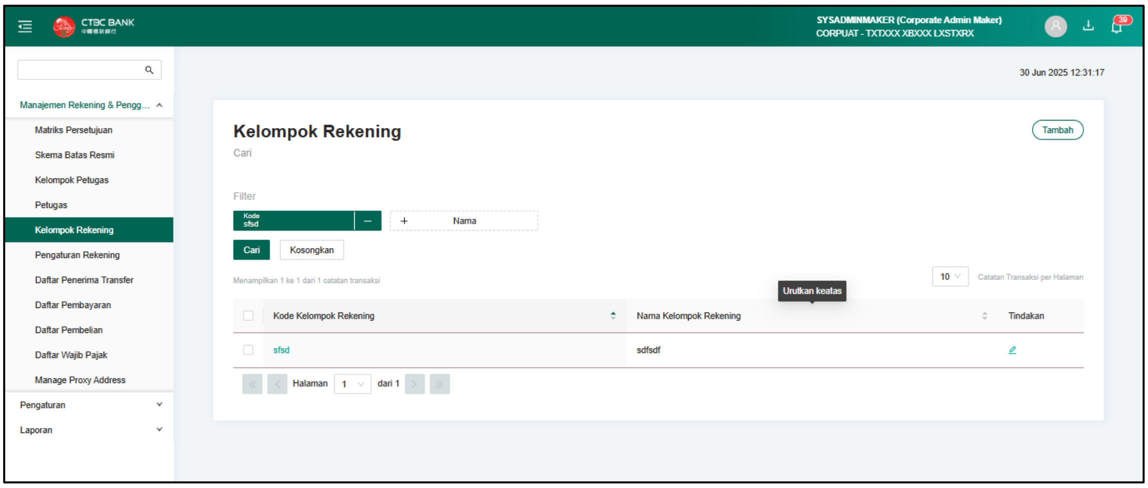
1.1 Search and View

Here are the steps to search and view **Account Group** details in the **Account & User Management** menu:

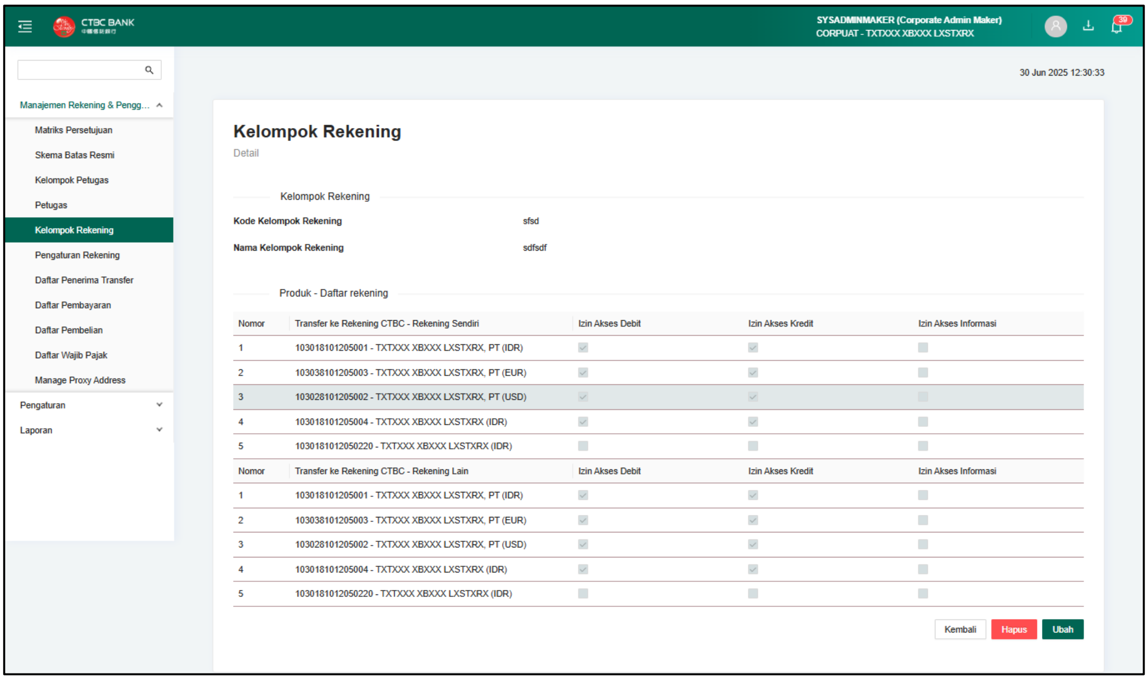
1. From the **Prime Cash** main menu, click **Account & User Management**, then click **Account Groups**. The **Account Group Search** page will be displayed.



2. Enter the **Code** or
3. Enter the **Name**,
4. Click the **Search** button. The specific **Account Group** will be displayed.



5. Click the **Code** link. The **Account Group Details** page will be displayed.

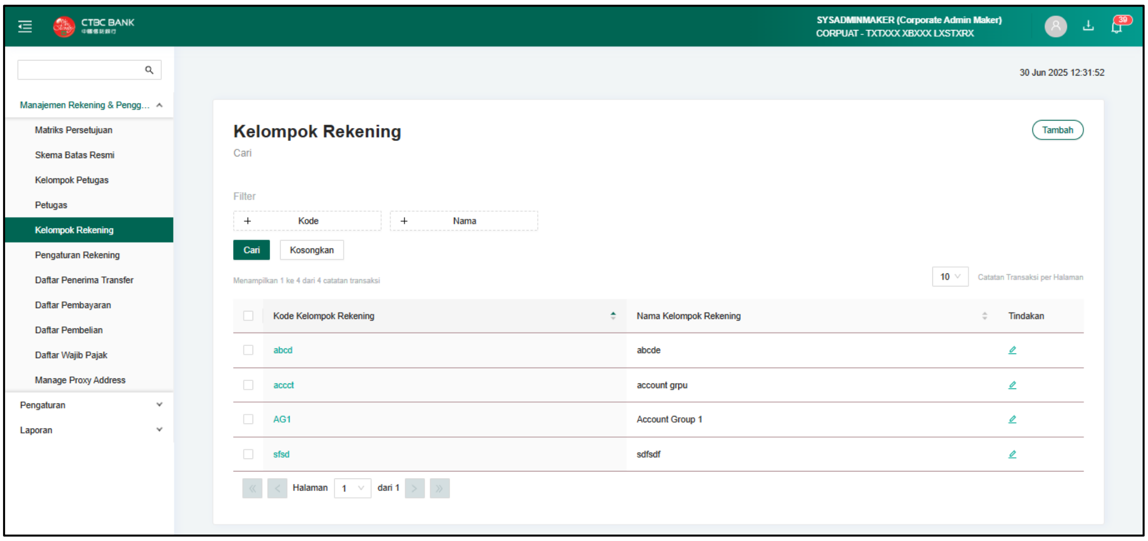


6. The following buttons will appear on the **Account Group Details** page:
   a. **Edit** button: To change the **Account Group** details.
   b. **Delete** button: To delete the **Account Group**.
   c. **Back** button: To navigate back to the **Account Group Search** page.

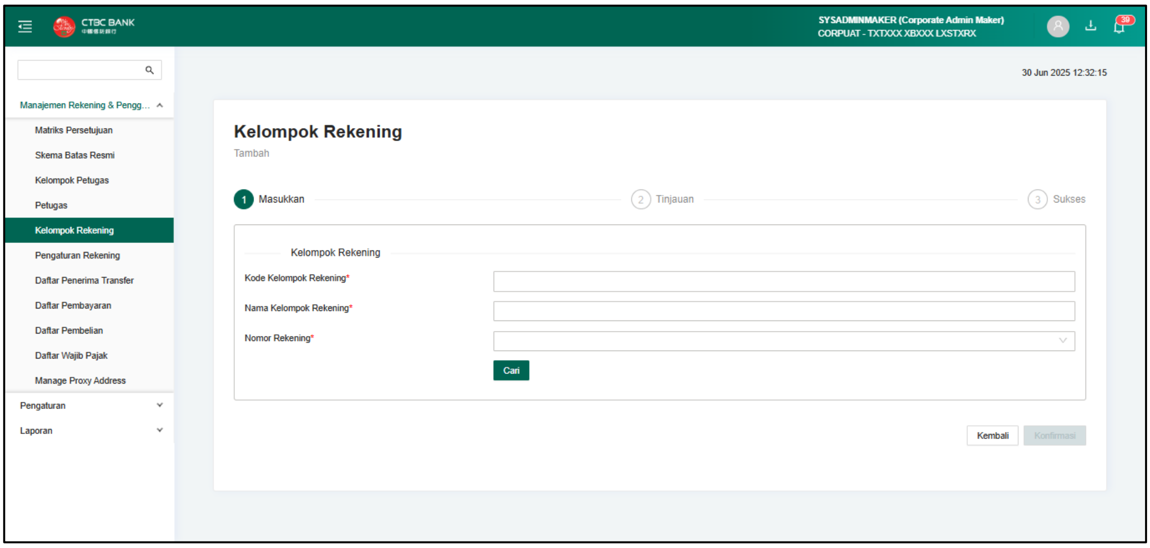
1.2 Add

Here are the steps to add an **Account Group** to the **Account & User Management** menu:

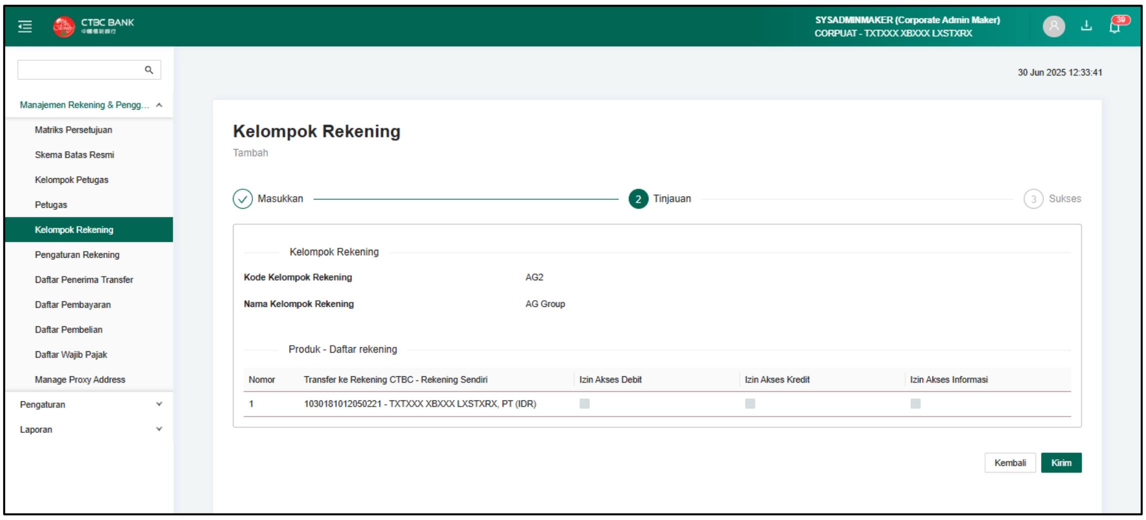
1. From the **Prime Cash** main menu, click **Account & User Management**, then click **Account Group**. The **Account Group Search** page will appear.



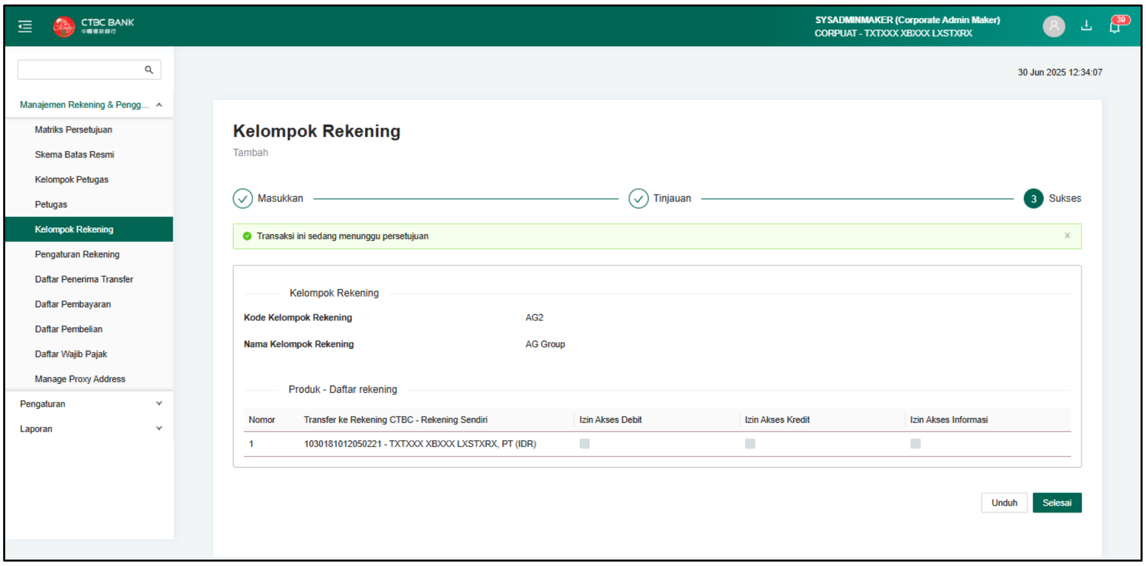
2. Click the **Add** button. The **Add Account Group** page will appear.



3. Enter the **Account Group Code** (**Required**).
4. Enter the **Account Group Name** (**Required**).
5. Enter the **Account Number** (**Required**) then click the **Search** button. **The Account List** and **Product List** will be displayed.
6. Check the **Account List** and **Product List** boxes.
7. Click the **Add to List button**.
8. Click the **Confirm** button. The **Add Account Group Confirmation** page will be displayed.



9. Click the **Back** button to return to the previous page or click the **Submit** button to continue the process.
10. Click the **Submit** button. The **Add Account Group Results** page will appear with the message "**This transaction is pending approval.**".



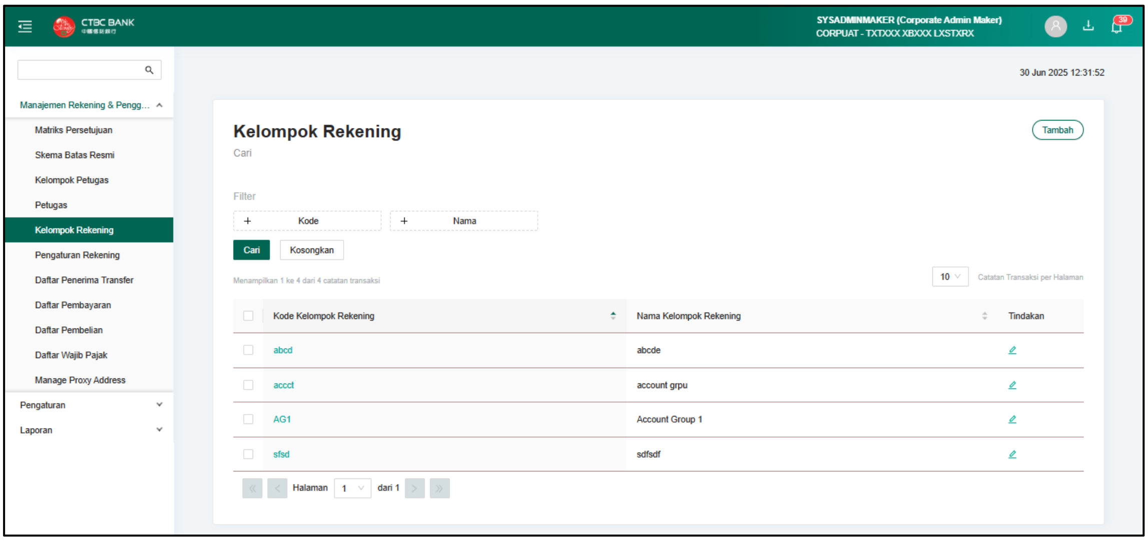
11. Click the **Download** button to download the page or click the **Done** button to return to the **Account Group Search** page.

1.3 Edit

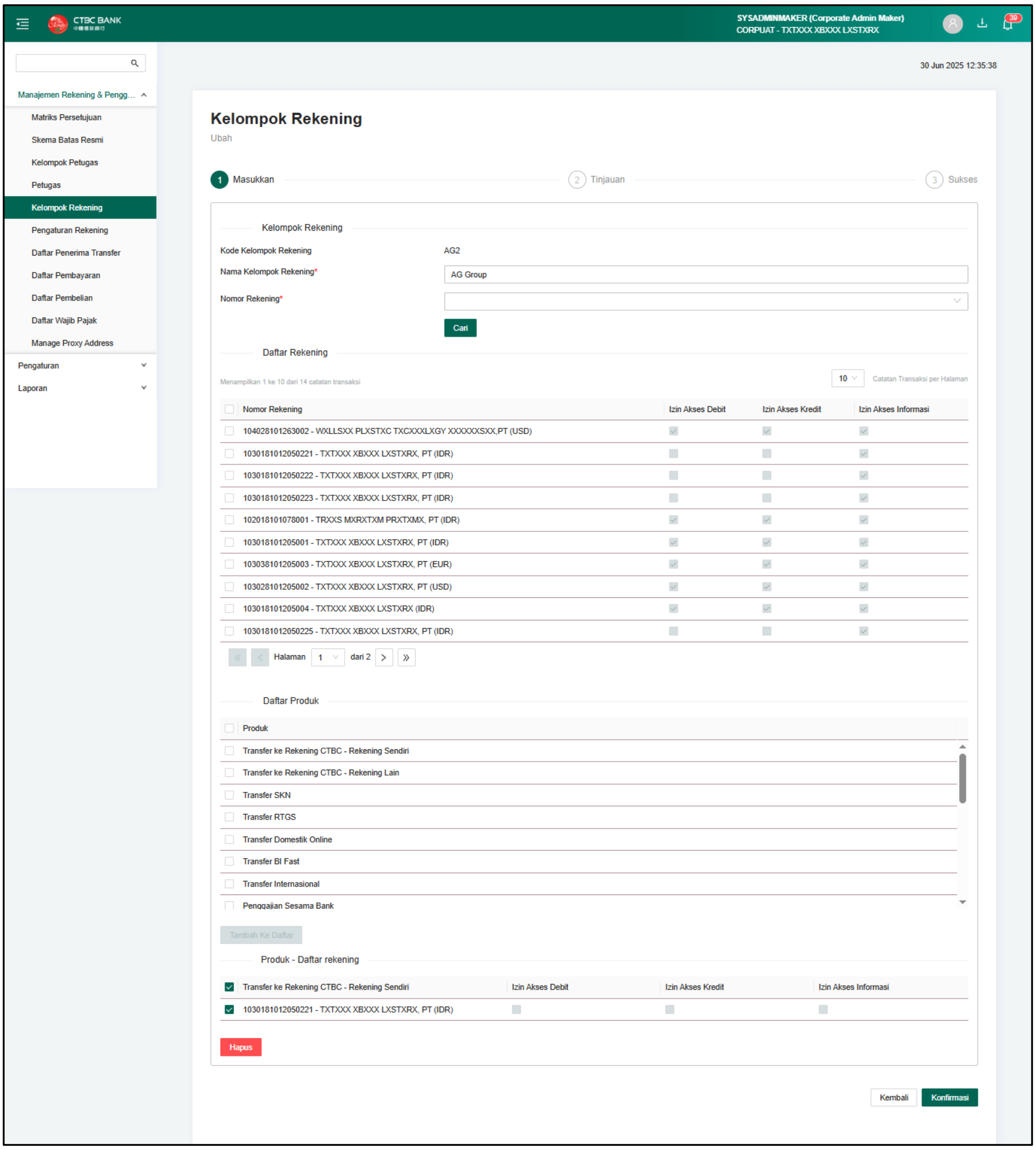
1.3.1 Edit from List

Here are the steps to change an **Account Group** from the list in the **Account & User Management** menu:

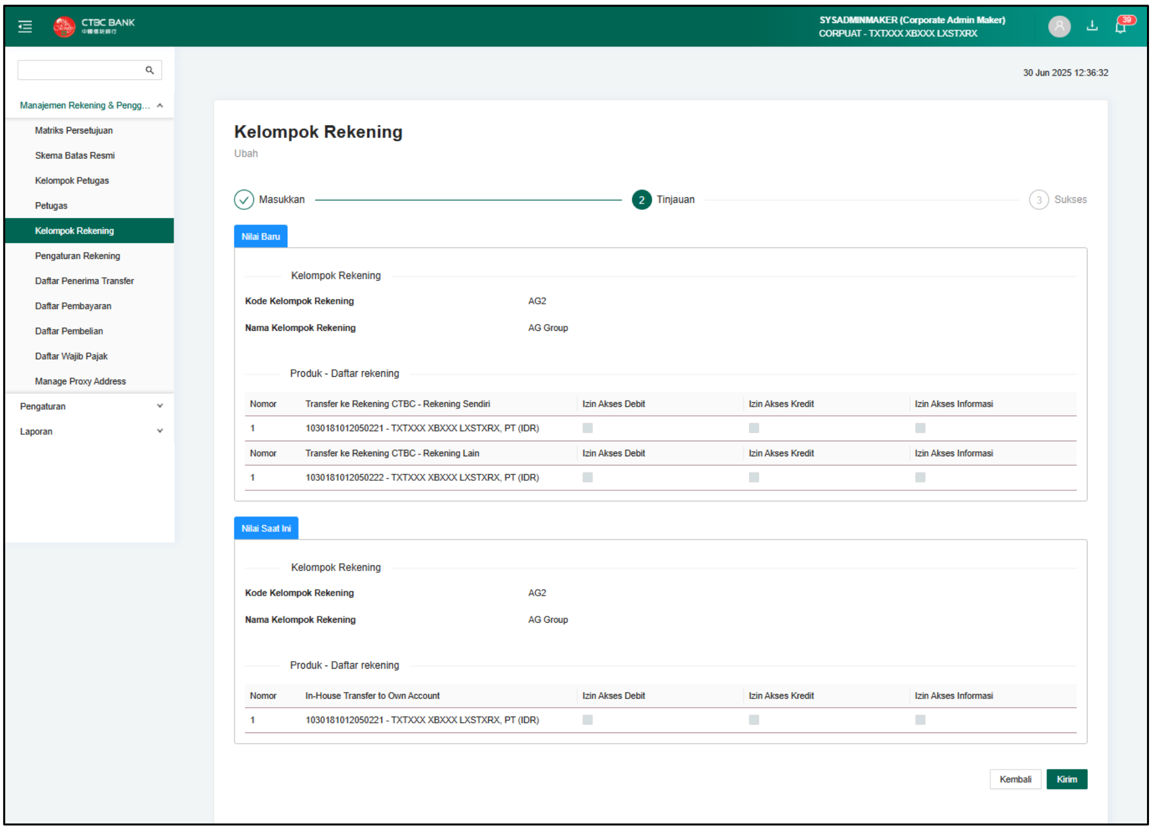
1. Go to the **Account Group List** page. The **Account Group List** page will be displayed.



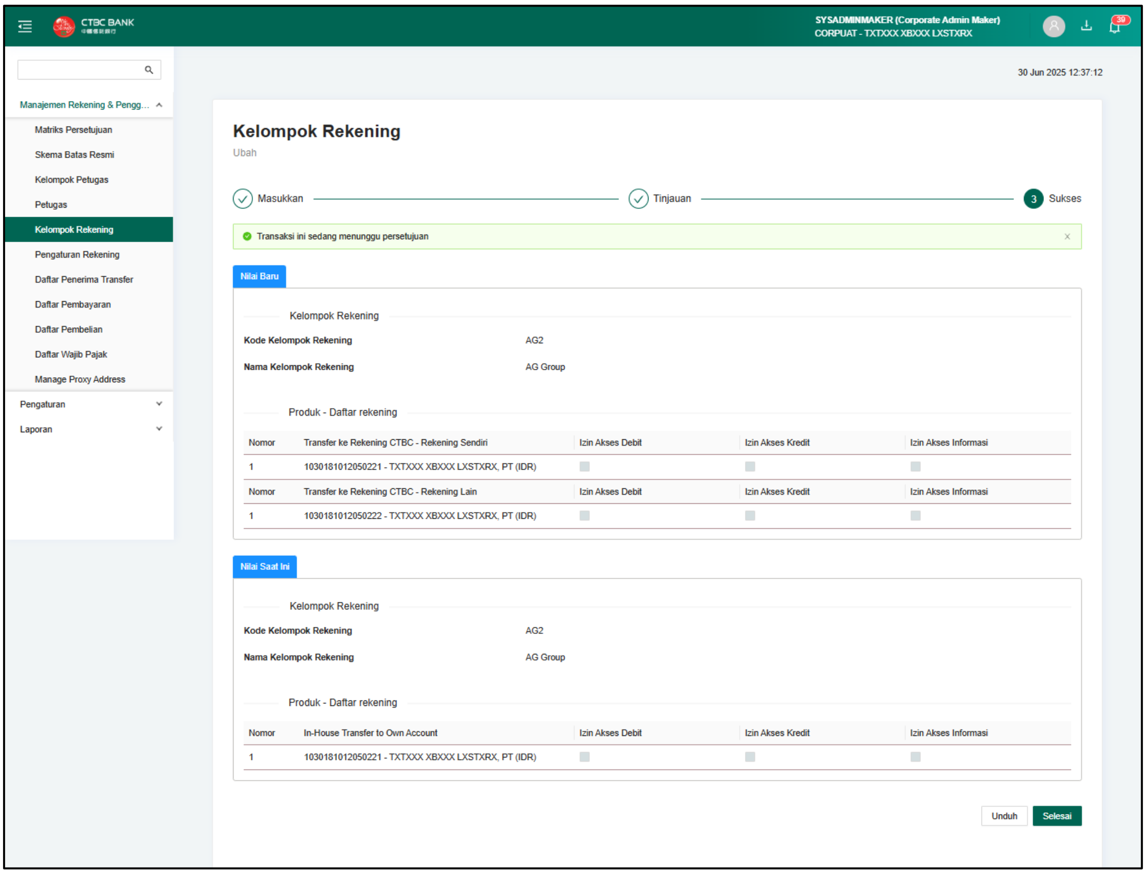
2. Click the **Edit** icon on the record you want to change. The **Edit Account Group** page will appear.



3. Make any necessary changes.
4. Click the **Back** button to return to the previous page or click the **Confirm** button to continue the process.
5. Click the **Confirm** button. The **Account Group Change Confirmatio**n page will appear.



6. Click the **Back** button to return to the previous page or click the **Submit** button to continue the process.
7. Click the **Submit** button. The **Change Account Group** Results page will appear with the message "**This transaction is pending approval.**"

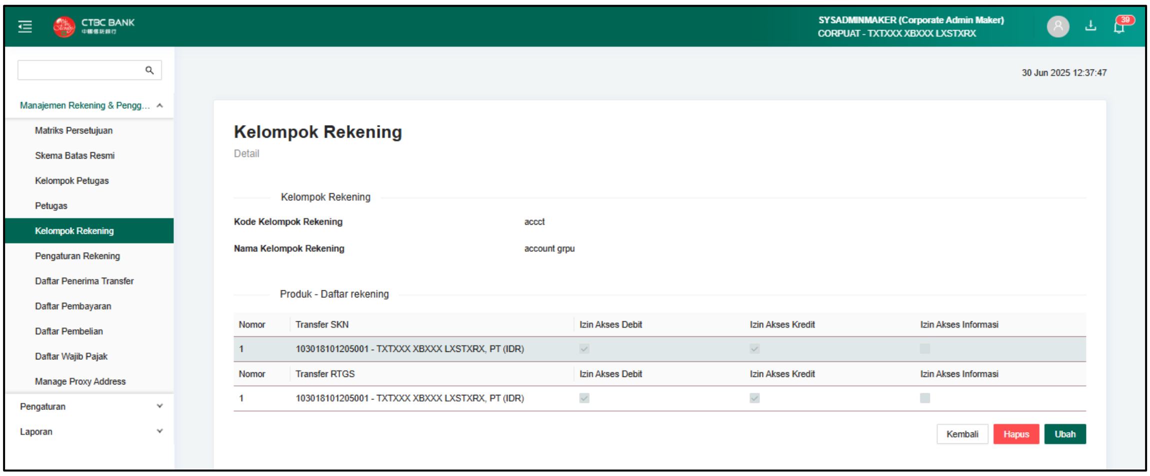


8. Click the **Download** button to download the page or click the **Done** button to return to the **Account Group Search** page.

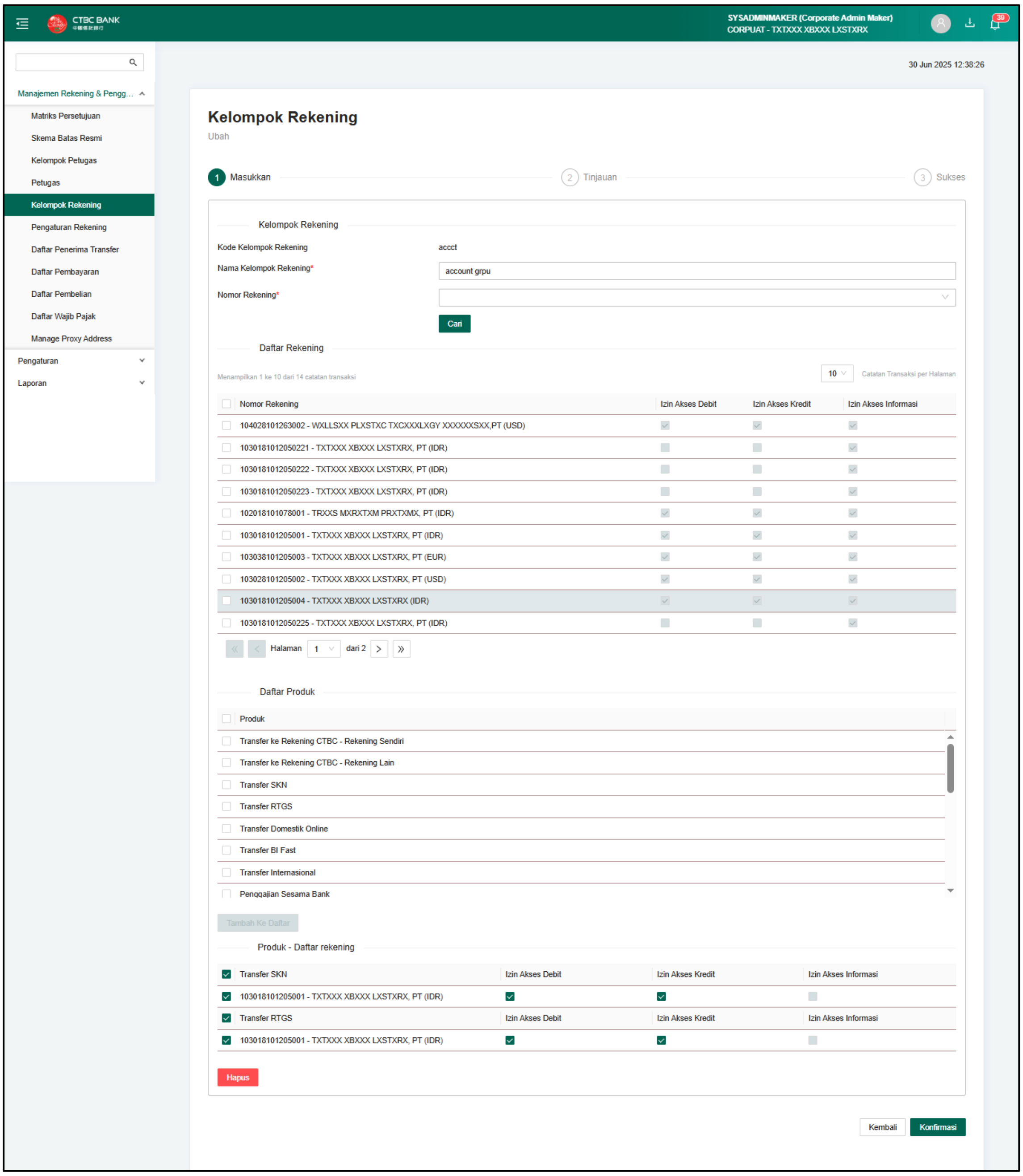
1.3.2 Change from Details

Here are the steps to change the **Account Group** from the details in the **Account & User Management** menu:

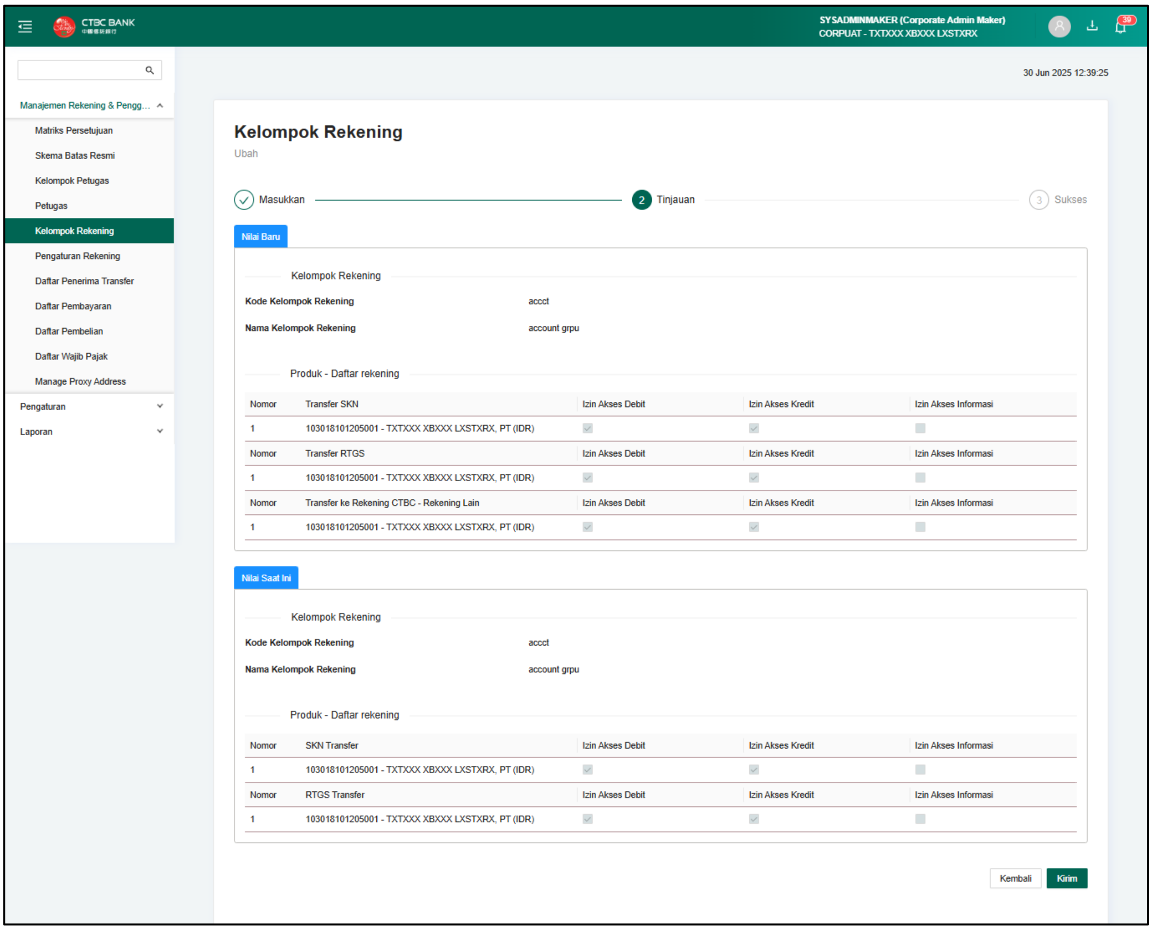
1. Go to the **Account Group Details** page. The **Account Group Details** page will be displayed.



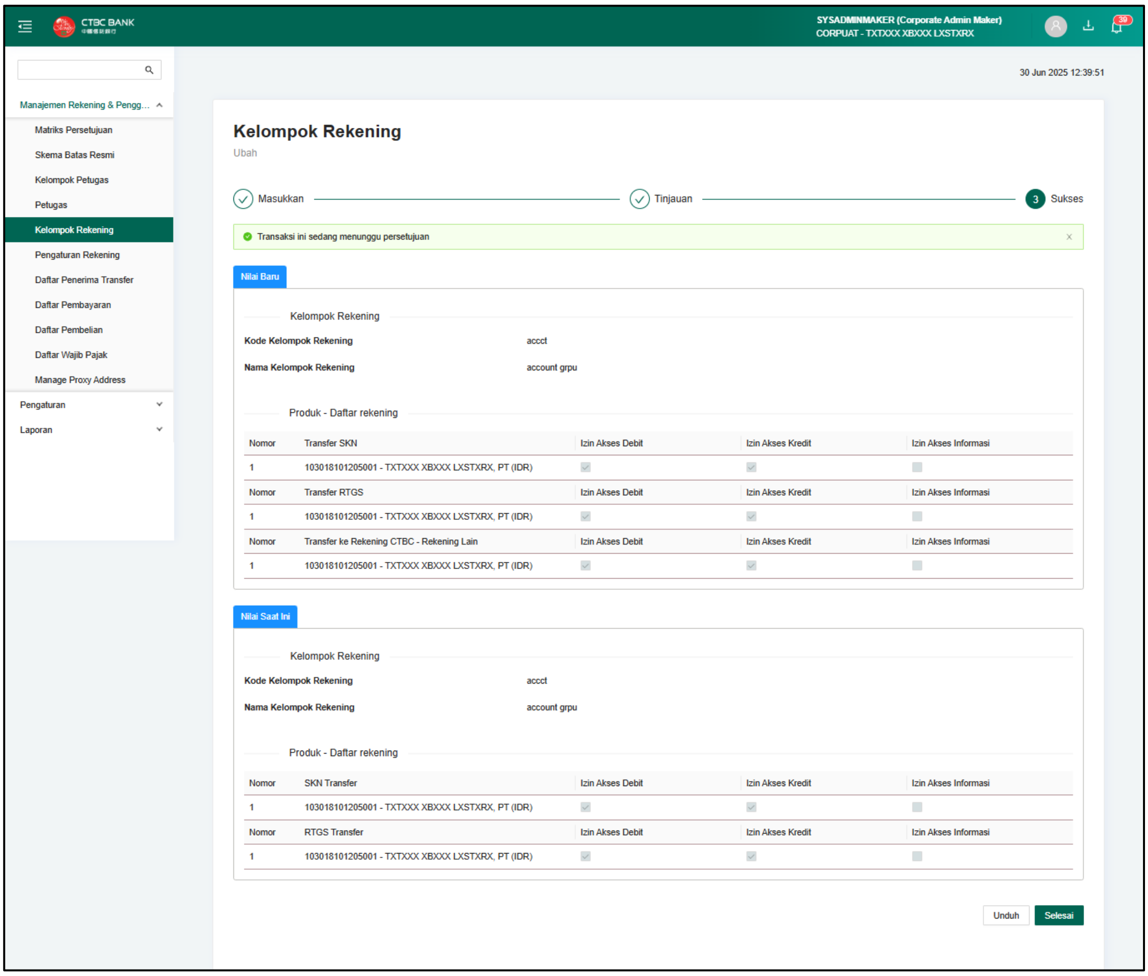
2. Click the **Change** button. The **Change Account Group** page will appear.



3. Make any necessary changes.
4. Click the **Back** button to return to the previous page or click the **Confirm** button to continue the process.
5. Click the **Confirm** button. The **Account Group Change Confirmati**on page will appear.



6. Click the **Back** button to return to the previous page or click the **Submit** button to continue the process.
7. Click the **Submit** button. The **Change Account Group Results** page will appear with the message "**This transaction is pending approval**.".



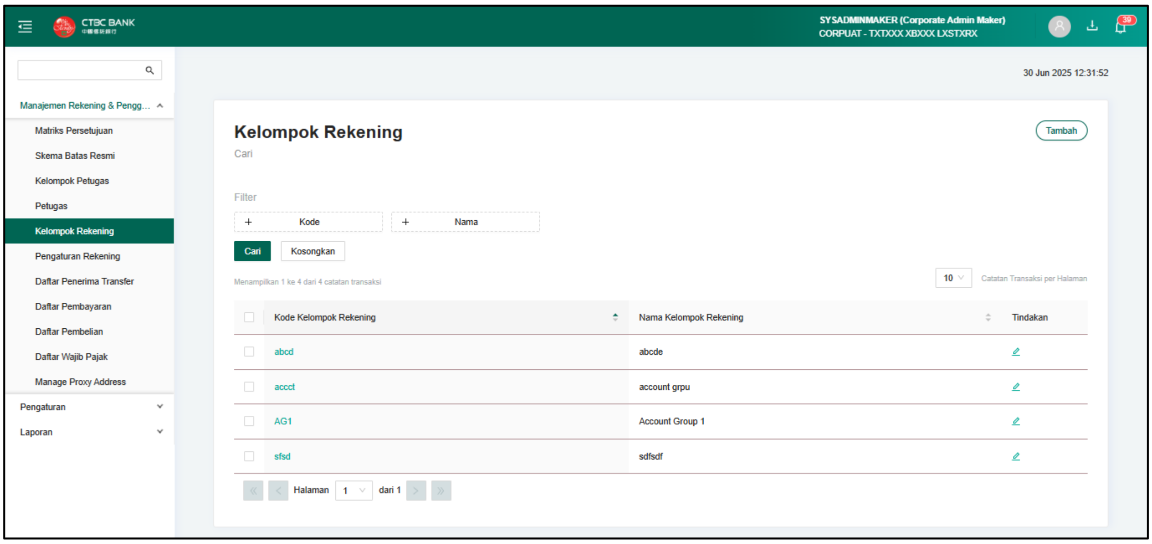
8. Click the **Download** button to download the page or click the **Done** button to return to the **Account Group Search** page.

1.4 Delete

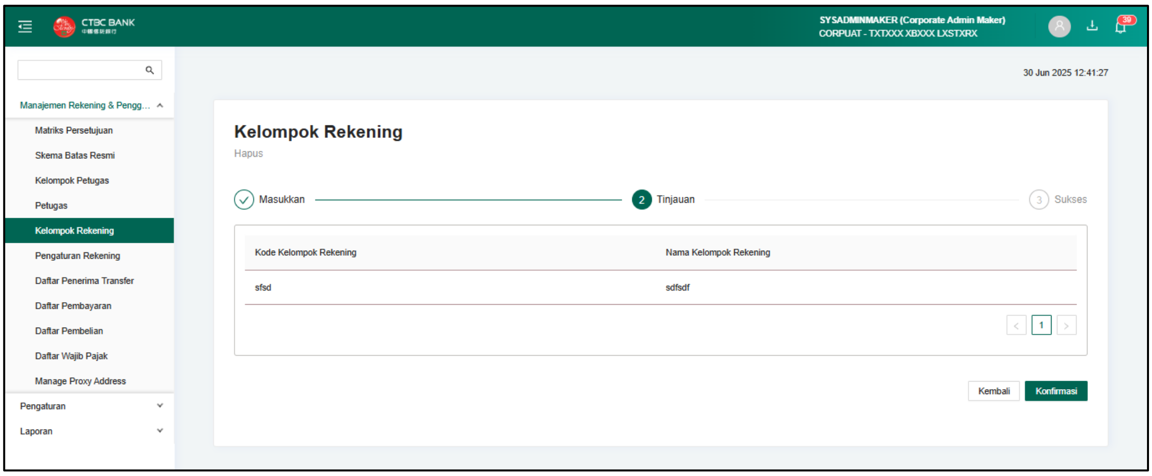
1.4.1 Delete from List

Here are the steps to remove an **Account Group** from the list in the **Account & User Management** menu:

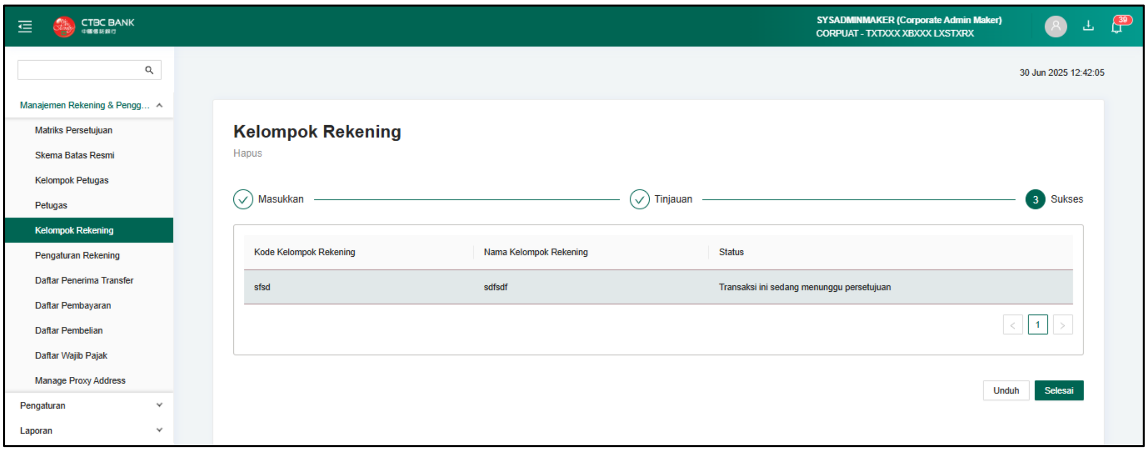
1. Go to the **Account Group List** page. The **Account Group List** page will be displayed.



2. Click the **Delete** icon on the record you want to delete, then click the **Delete** button. The **Account Group Delete Confirmation** page will appear.



3. Click the **Back** button to return to the previous page or click the **Submit** button to continue the process.
4. Click the **Confirm** button. The **Account Group Deletion Results** page will appear with the message "**This transaction is pending approval."**.

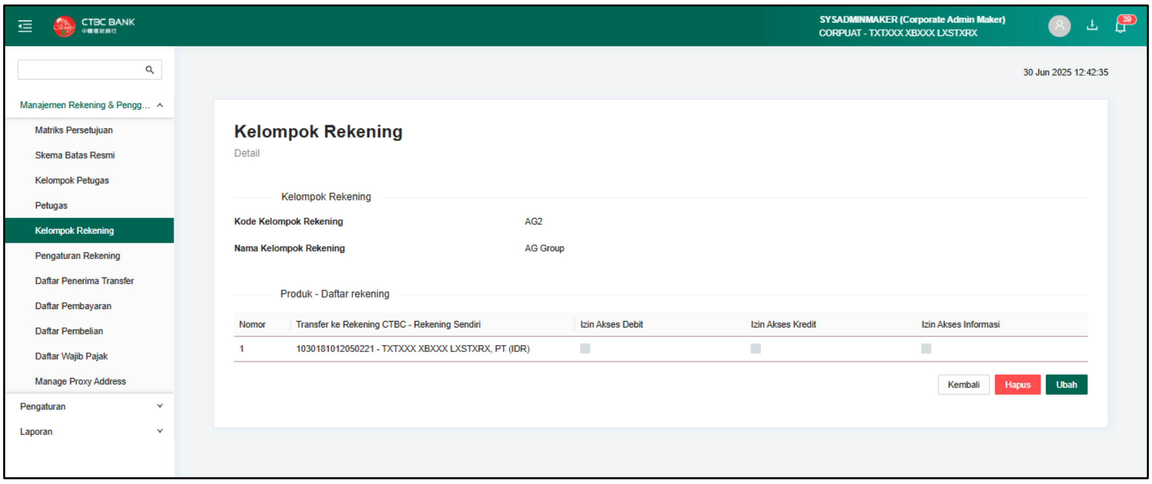


5. Click the **Download** button to download the page or click the **Done** button to return to the **Account Group Search** page.

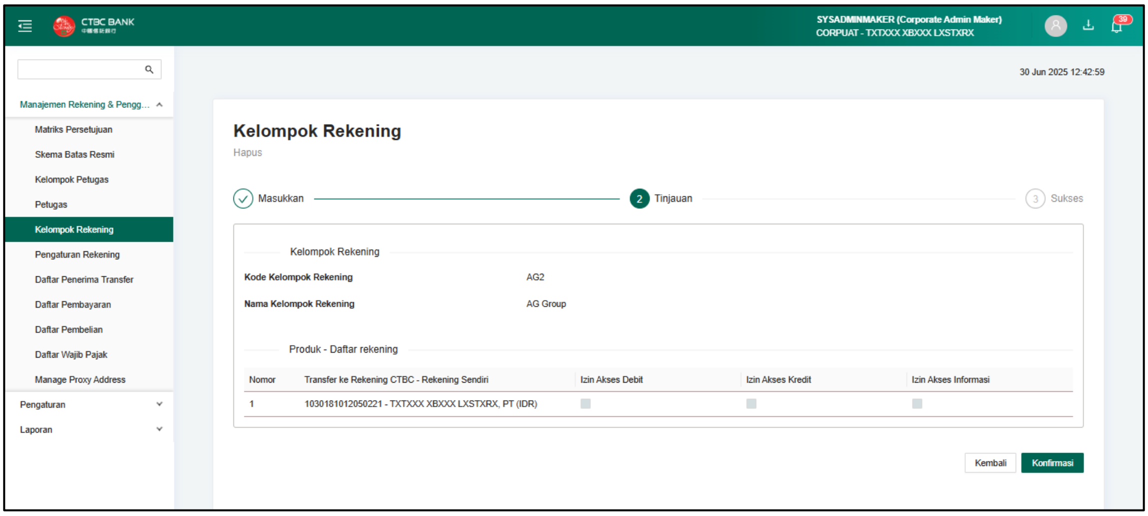
1.4.2 Remove from Details

Here are the steps to remove an **Account Group** from the details in the **Account & User Management** menu:

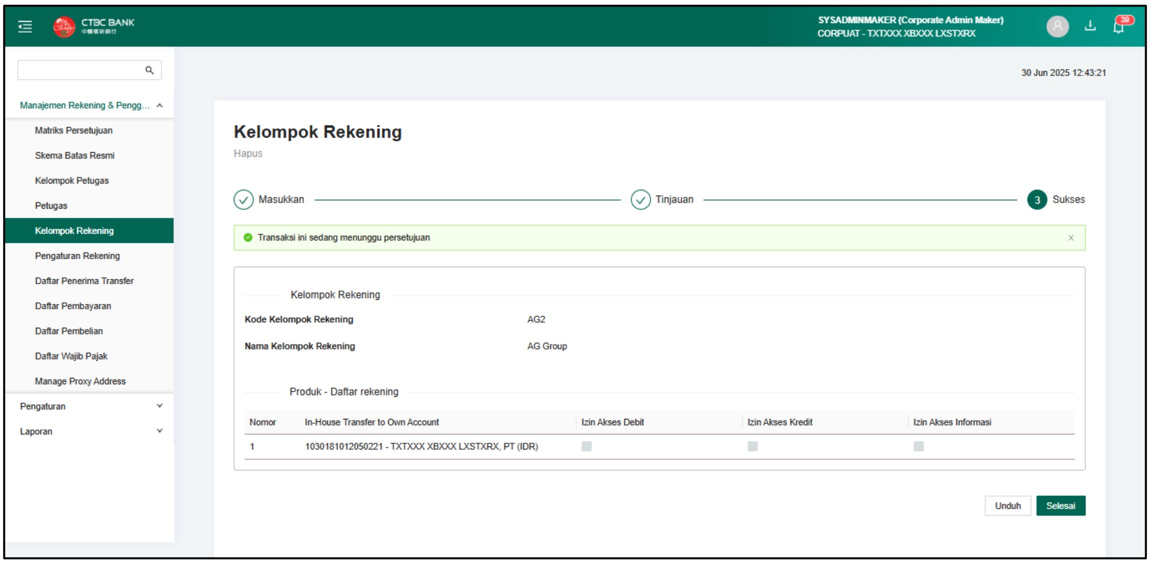
1. Go to the **Account Group Details** page. The **Account Group Details** page will be displayed.



2. Click the **Delete** button. The **Account Group Delete Confirmation** page will appear.



3. Click the **Back** button to return to the previous page or click the **Confirm** button to continue the process.
4. Click the **Confirm** button. The **Account Group Deletion Results** page will appear with the message "**This transaction is pending approval.**".



5. Click the **Download** button to download the page or click the **Finish** button to return to the **Account Group Search** page.