SWAC Accounts for Subcontractors and Projects

Summary

This *Customer Support Bulletin* describes how to create additional SWAC accounts for the purpose of tracking unique subcontractors and/or projects. It provides detailed instructions on creating new accounts, transferring funds between your main SWAC account and subcontractor or project accounts, and viewing detailed transactions for any account.

PLEASE NOTE: A main SWAC account must exist before subcontractor or project accounts can be created. For more information regarding the creation of this account or accessing the Finance tab for your organization, please refer to *Customer Support Bulletin: SWAC Account Basics*.

How to create a new SWAC Account for a Subcontractor or Project

To create a new SWAC account to be used for a specific subcontractor or project, simply navigate to the Finance tab for your organization, and select the "**add account**" link. These accounts are created as shown below in Fig.1 as sub-accounts under your main SWAC account.

As new accounts are created, they will appear in the bottom half of the page in the appropriate category.

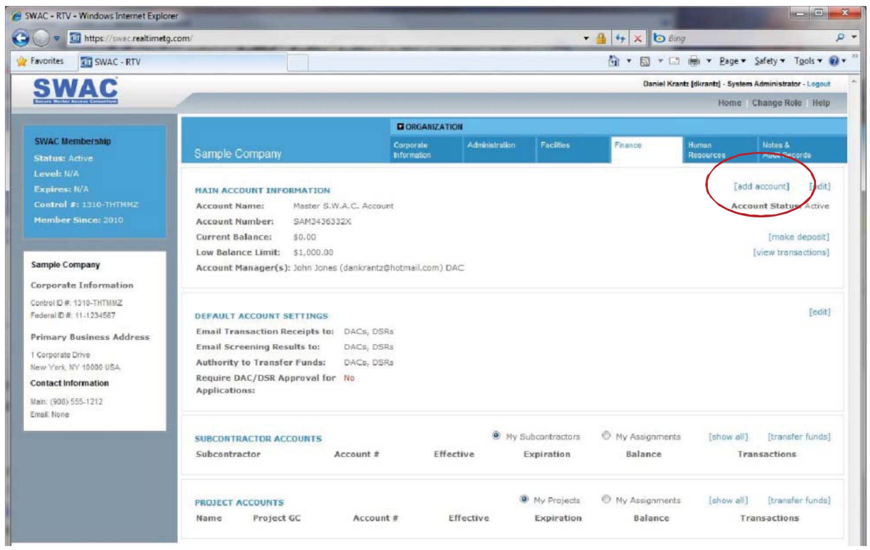
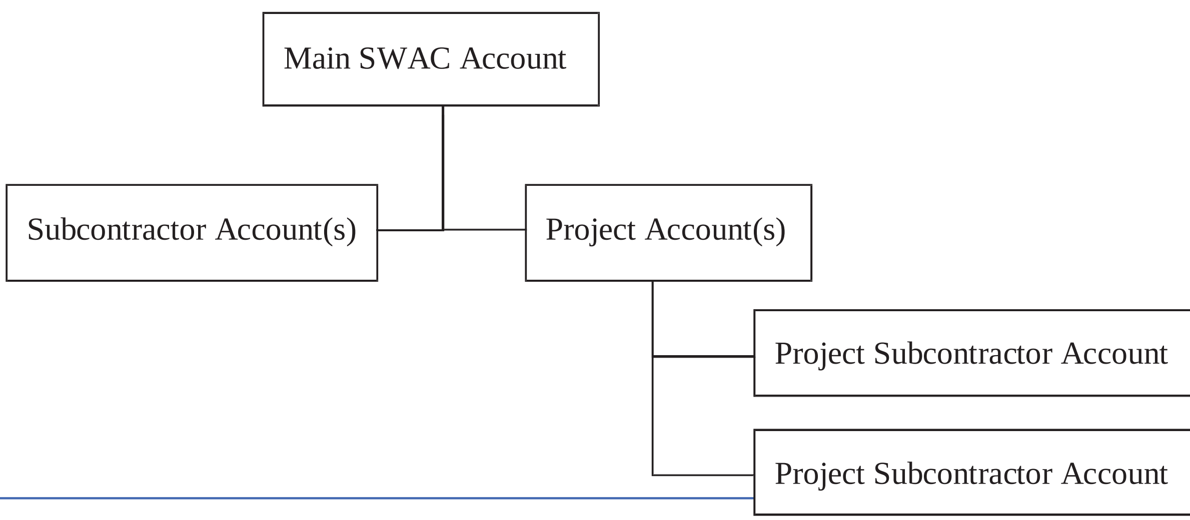
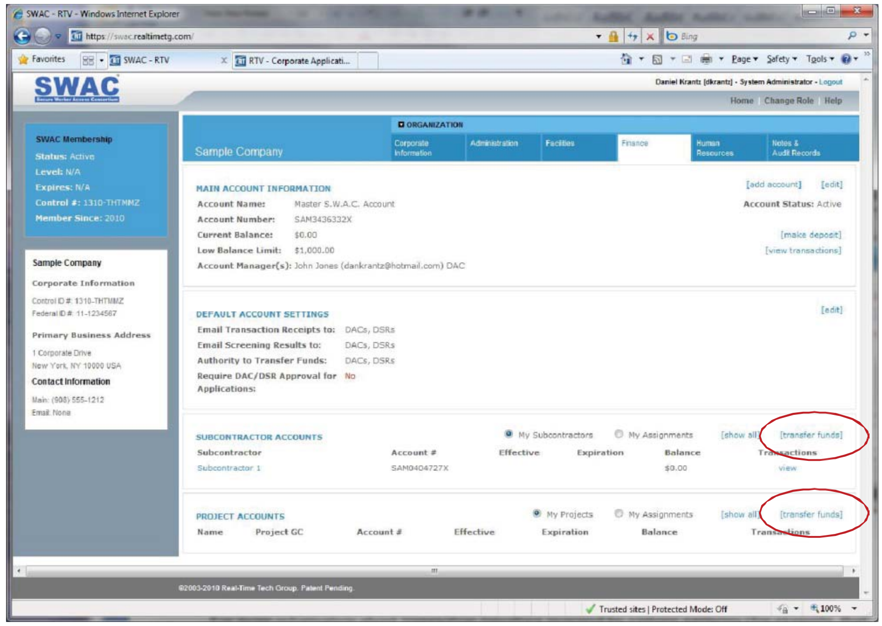


Fig.1 Account Organization



How to transfer money to a Subcontractor or Project Account

To transfer funds to or from a subcontractor or project account, simply click the “transfer funds” link located adjacent to the appropriate category (i.e. subcontractor accounts or project accounts).



How to view the details of a Subcontractor or Project Account

To view the details of a subcontractor or project account, simply click the account name.