

Sub-Accounts

PRESENTED BY CAMPUS SERVICES

Sub-Accounts Overview

Allow tracking of financial activity within an account to a finer level of detail

Each of the Sub-Accounts can use all of the Object and Sub-Object Codes available to that account

1-5 alpha/numeric characters

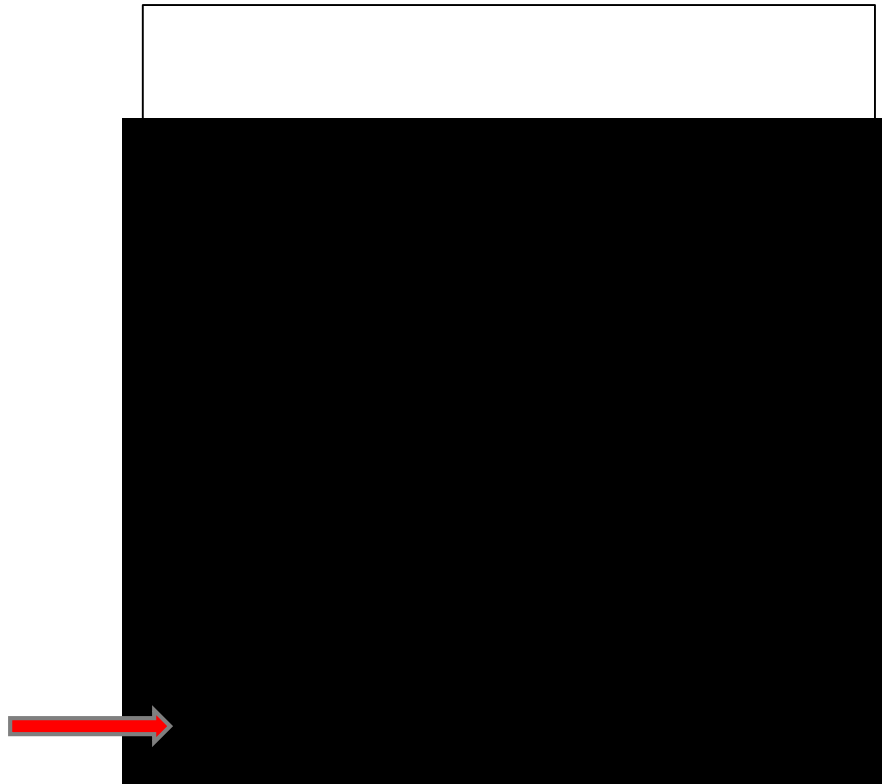
Take on the attributes of the parent account

Must be created (no global option is available)

Requests are routed to the College/VP Business Officer for approval

Must be deactivated by account number (no global deactivation is available)

Sub-Accounts



Sub-Account – By Create New or Copy

A sub-account can be created by clicking “create new” or “copy”.

- If copying, you can enter an account number or use the wildcard “*” to find a similar account.

Sub-Account Lookup create new * required field

Chart Code: 🔍
Account Number: 🔍
Sub-Account Number:
Sub-Account Name:
Active Indicator: Yes No Both

316 items retrieved, displaying 1 to 100. [\[First/Prev\]](#) [1](#), [2](#), [3](#), [4](#) [\[Next/Last\]](#)

Actions	Chart Code	Account Number	Sub-Account Number	Sub-Account Name	Active Indicator	Sub-Account Type Code
edit copy	CO	2701300	00	B/W Copies	Yes	EX
edit copy	CO	2701700	00001	GSSE bike ride	Yes	EX
edit copy	CO	2781900	00001	SEE	Yes	EX
edit copy	CO	2701700	00002	BAU	Yes	EX
edit copy	CO	2771000	01	CSU Magazine	Yes	EX

Sub-Accounts – Create New

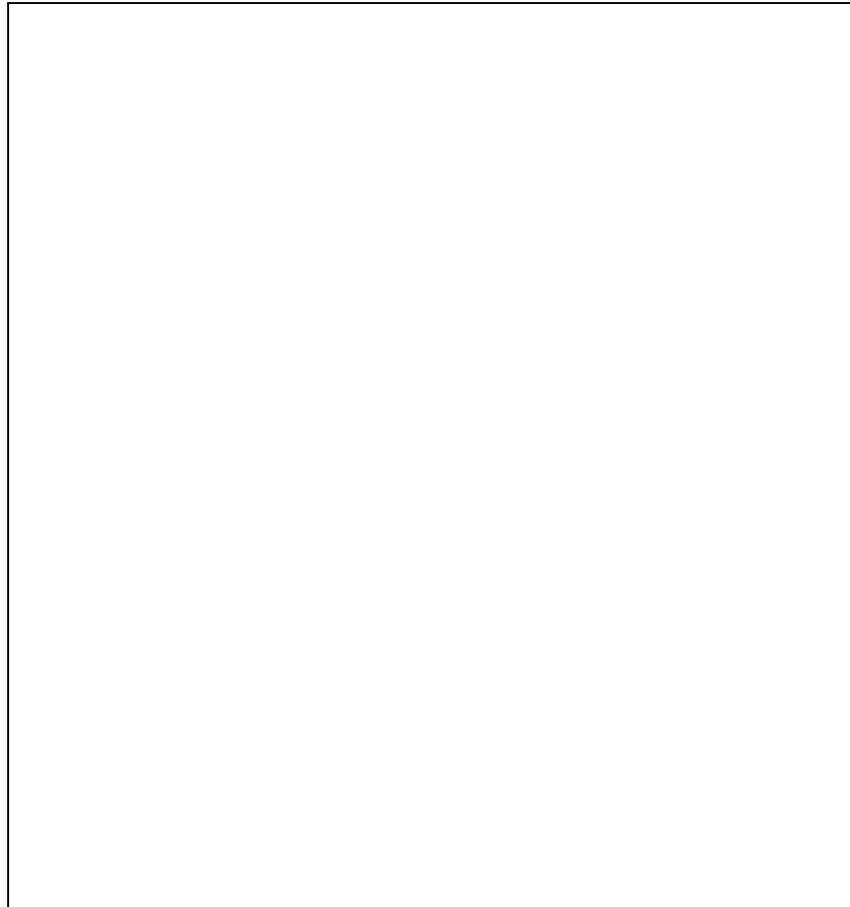
Complete all required fields (“*”)

The active indicator will default to checked

Sub-accounts can be 1-5 alpha/numeric characters

Attach notes and supporting documentation

Hit submit when done



Sub-Accounts – Create New by Copy

Complete all “*” items, and include detailed explanation

Enter the Account Number

Change the sub-account name to the new sub-account name

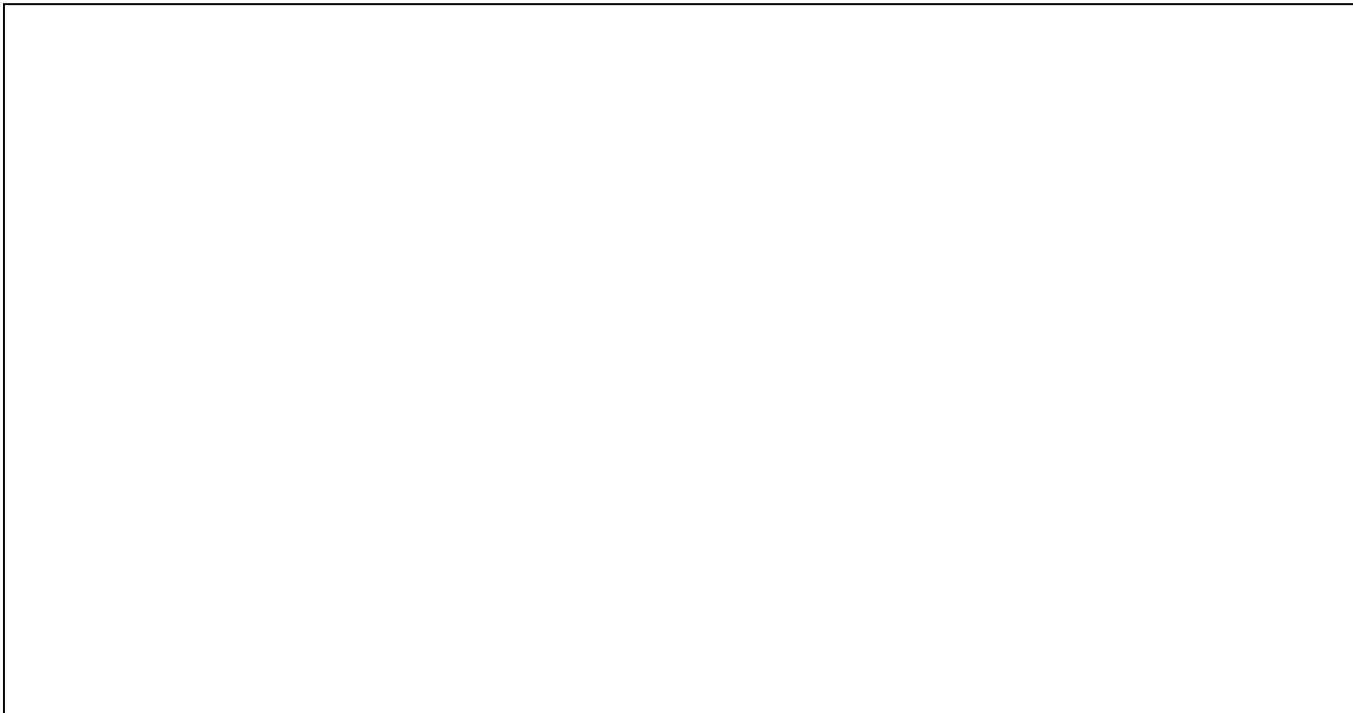
Attach notes and supporting documentation

Then hit submit

Sub-Accounts - Edit

To edit or de-activate a sub-account click “edit”

- The sub-account name can be updated
- To de-activate, uncheck the active indicator



Questions ???

Contact your Campus Service
Representative

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