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-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

Erin Mercurio  491- 6752
Summer Leaming  491- 2801
Publina Meldrum  491-4148