Budget Transfer Directions

Budget Transfer Template

The Budget Transfer Template can be copied and pasted into the body of any email manually or with Outlook Quick Parts. Indexes are a six-digit shortcut to the Fund, Organization, and Program numbers. Accounts refer to a type of transaction. A full list of Account numbers can be found in the Banner e-Print system. Additional examples and best practices can be found at the end of the document.

From Index and Account:
To Index and Account:
Amount of transfer:
Reason for Transfer:
Permanent or One-time:

Directions for Outlook Quick Parts

1. Open up a new email message and paste the Budget Transfer Template into the body of the email.
2. Select the text area of the Budget Transfer Template and click the Quick Parts icon on the Insert ribbon tab.
3. Select Save selection to the Quick Parts Gallery, at the bottom of the flyout.

4. Enter the name for the Quick Parts building block. The rest of the items can remain as the defaults.
5. To use the template, open up a new email message. Put the cursor in the body of the email. In the Insert Ribbon tab, click Quick Parts and then click the desired template. The template will then appear in the body of the email.
6. Example

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Hello,

I am requesting the following transfer.

From Index and Account: 110033 71010
To Index and Account: 110033 61011
Amount of transfer: 1
Reason for Transfer: Example
Permanent or One-time: One-time

Thank you!

Dawn Brandt, Budget Data Reporting Manager
College of Charleston
Budgeting and Payroll Services
branddt@cofc.edu
(843) 953-2856
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7. Best Practices
   a. Most common Account operational expense numbers.
      i. 71010 Contractual Services
      ii. 72010 Supplies
      iii. 73010 Travel
      iv. 75010 Contingencies
   b. Banner e-print can be found at https://eprint.cofc.edu.
   c. Notify the Budget Office for other options if the budget transfer request is between Indexes starting with one (1xxxxx) and other Indexes (starting with 2/3/5/6/9).
   d. Ensure that the requesting from index and account contains the necessary funds to complete the budget transfer.