

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:

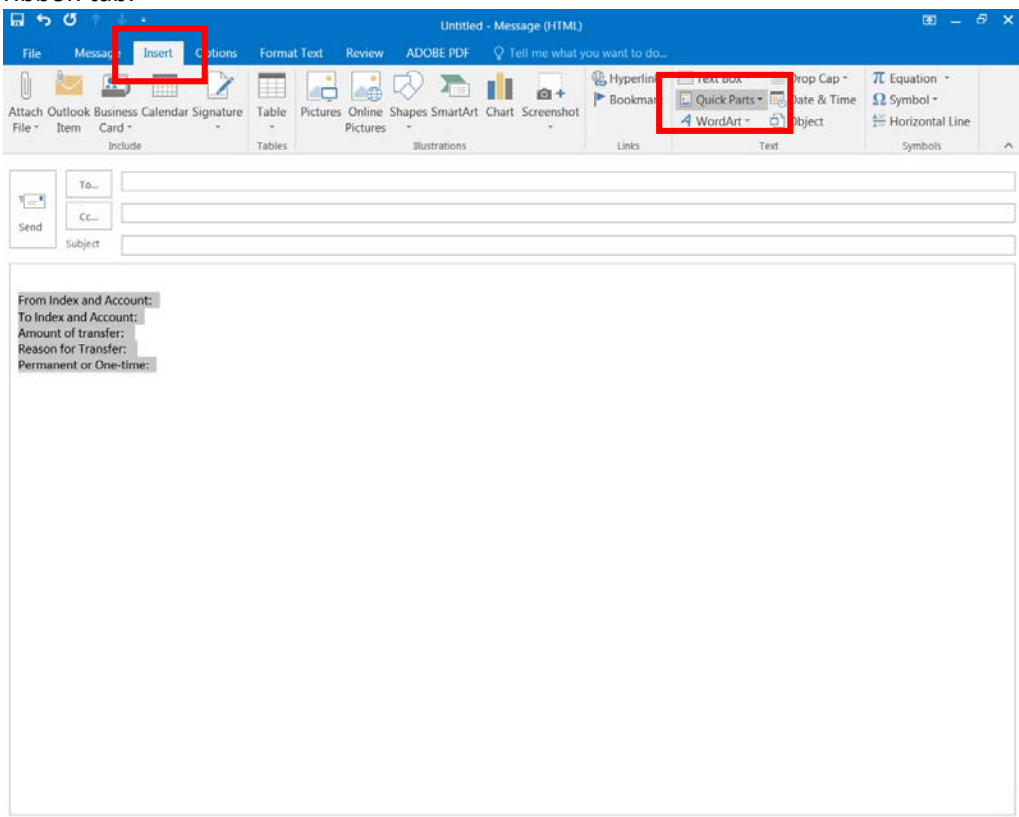
Amount of transfer:

Reason for Transfer:

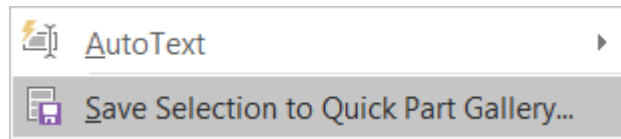
Permanent or One-time:

Directions for Outlook Quick Parts

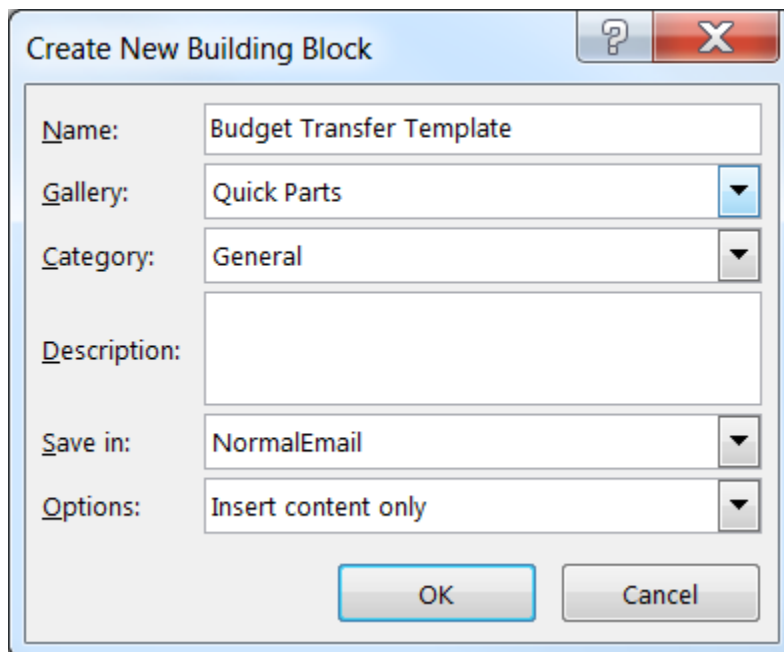
1. Open up a new email message and paste the Budget Transfer Template into the body of the email.
2. Select the text area of the Budget Transfer Template and click the Quick Parts icon on the Insert ribbon tab.



3. Select Save selection to the Quick Parts Gallery, at the bottom of the flyout.



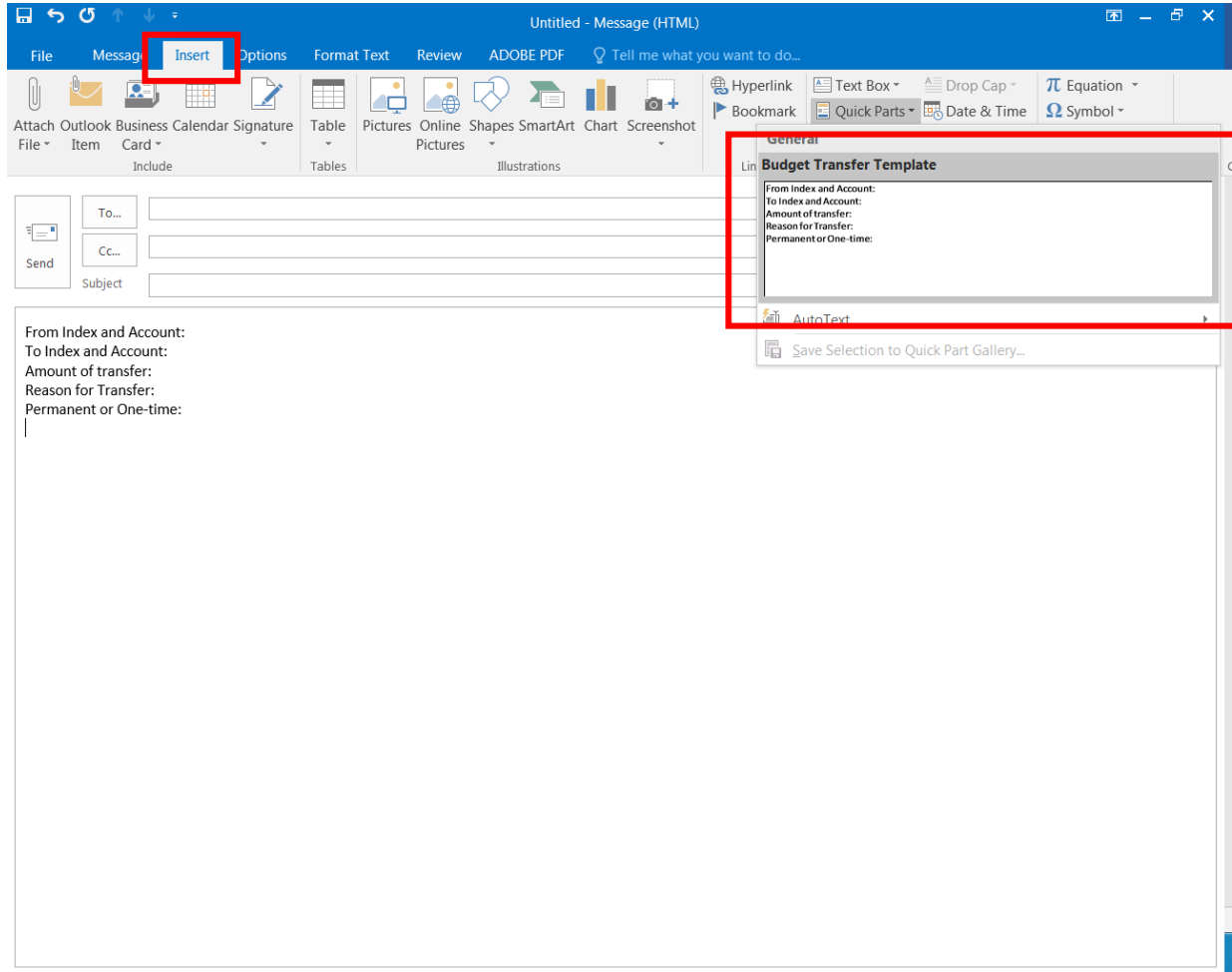
4. Enter the name for the Quick Parts building block. The rest of the items can remain as the defaults.

A screenshot of a dialog box titled 'Create New Building Block'. The dialog has a title bar with a question mark icon and a close button (X). The main area contains several fields:

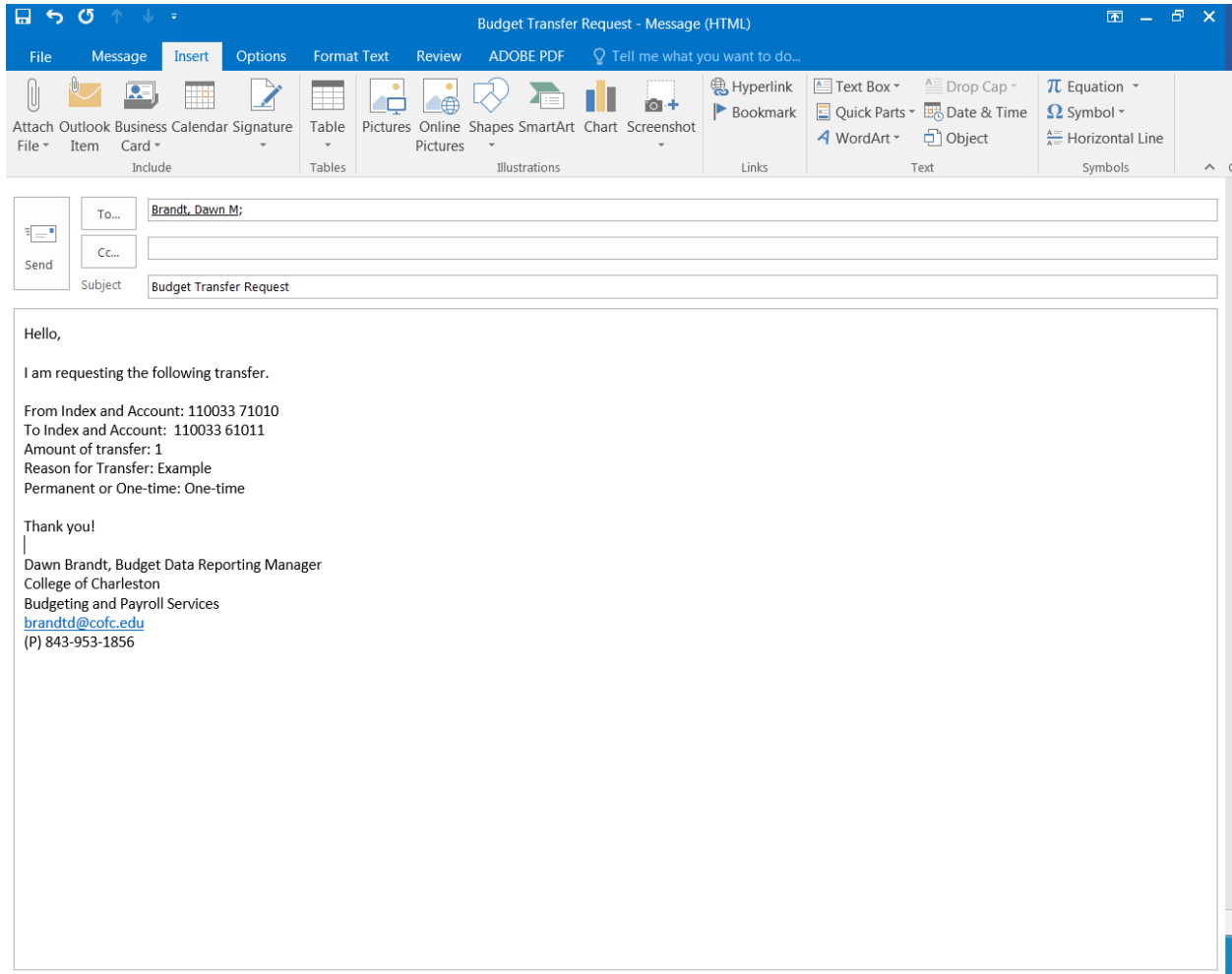
- Name:** A text box containing 'Budget Transfer Template'.
- Gallery:** A dropdown menu with 'Quick Parts' selected.
- Category:** A dropdown menu with 'General' selected.
- Description:** An empty text box.
- Save in:** A dropdown menu with 'NormalEmail' selected.
- Options:** A dropdown menu with 'Insert content only' selected.

At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

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



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.