Quick Reference Guide: Creating an Account Delegate

Instructions: Use the following steps to create an Account Delegate. This guide instructs you on how to:

- Create a new Account Delegate or
- Deactivate an existing Account Delegate

For more detailed information, please refer to Creating an Account Delegate Job Aid.

Note: An asterisk (*) denotes a required field.

To create a new Account Delegate:

1. Select Account Delegate under Chart of Accounts on the KFS Main Menu.

2. Click Create New on the top right side of the Account Delegate Lookup screen.
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3. Enter the Account Delegate’s name for the Description on the Account Delegate screen.

4. Type in the business purpose and account number for the Explanation.

5. Enter IS for the Chart Code.

6. Enter the Account Number for which you will delegate responsibility.

7. Enter KFS as the Document Type Name.

8. Enter the Account Delegate’s NetID for the Account Delegate Principal Name or look it up using the looking glass icon.

9. Click the calendar icon to choose an Account Delegate Start Date or leave it blank to make it effective immediately.

Steps 13-16 Optional – To notify a user about Account Delegate responsibilities:

10. Click show on the Ad Hoc Recipients tab.

11. Select FYI from the Action Requested drop down box.

12. Type the Account Delegate’s NetID in the Person box.

13. Click Add in the Actions box to add this request.
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14. Click Submit to route document to the Fiscal Officer on the account.

To deactivate an existing Account Delegate:

1. Click Account Delegate under Chart of Accounts on the KFS Main Menu.

2. Enter the IS for the Chart Code.

3. Enter the Account Number on the Account Delegate Lookup screen then click Search.

Note: This returns a list of Delegates on the account.
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4. Click **Edit** next to person you want to change.

![Account Delegate Lookup](image)

5. Enter the Account Delegate’s name in the **Description** and reason for the change in the **Explanation**.

6. Uncheck the **Account Delegate Active** box to deactivate your current Account Delegate.

**Optimal:** If you do not want the change to be effective immediately, enter a new **Account Delegate Start Date**.

![Account Delegate](image)
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7. Click Show on the Ad Hoc Recipients tab. 

Optimal: Notification to the former Account Delegate.

8. Select FYI from the Action Requested drop down box.

9. Type the Account Delegate’s NetID in the Person box.

10. Click Add in the Actions box to add this request.

11. Click Submit to route to the Fiscal Officer on the account.