Post a Corporate Transaction (Quick Post)

Purpose: Use this document as a reference for how to add a transaction to a corporate account in ctcLink.

Audience: Student Financials Staff.

You must have at least one of these local college managed security roles:

- ZZ SF Charges and Payments

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

As a reminder: **NEVER** 'Quick Post' student charges to a corporate account. Utilize the Third Party QRG's to create and assign a contract and charges.

Navigation: Student Financials > Charges and Payments > Post Corporate Transaction

1. The Corporate Post page displays.
2. In the **Add a New Value** tab, enter or search for the:
    1. **Business Unit.**
    2. **External Org ID**.
    3. **Account Type**.
    4. **Item Type**.
3. Select the **Add** button and the Corporate Post page displays.
4. Enter the **Amount** for the item type.
5. Enter or search for the transaction **Term**.
6. *Optional*: Enter the **Reference Number**.
7. The **Item Effective Date** defaults to the current date. You can update this date as necessary.
8. Enter the **Due Date** for any charge Item Type.
9. Select the **Post** button.
10. Select the **New Transaction** button to post a new transaction.
11. Process complete.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

View Tutorial Via Panopto

View the external link to Post a Corporate Transaction (Quick Post). This link will open in a new tab/window.