**View Customer Account**

The Customer Accounts page displays all transactions for a student from all sources (e.g. Tuition Calculation, Group Post, External File Load, Cashiering, etc.). The various links on the page allow users to see different views of the account information.

**Steps***

1. Navigate to: **Student Financials > View Customer Accounts**
2. Enter appropriate search criteria. 
   i.e: Empl ID; National ID; or Last Name & First Name
3. Click the **Search** button. 
   **Note**: The Customer Account Component will display.
4. Click the **Academic Information** link. 
   **Note**: View enrollment and limited personal information for a given student. On the Academic Information page, verify information about the student’s Academic Career, Program, Residency Group, Units, Level and Academic Load for each Term and Institution. Also click links to view information about the student’s Academic Plan and Enrollment.
5. Click the **Return** link to go back to the Customer Account Component.
6. View the Total. The total is the Account Balance for this student.
7. View Anticipated Aid. The amount of aid that is likely going to go to this student.
8. Select the Account Details link associated to the account type in order to view more information regarding the account. 
   **Note**: The Account Details page displays summary details about each line item for an account type including when it was applied, when it was paid, and how it was paid. See below for more information.
9. Click the **Return** link to go back to the Customer Account Component
10. Click the Detail Trans link. 
    **Note**: The Detail Trans page lists debits and credits that have been applied to the student's account for each posting.
11. Click the **Return** link to go back to the Customer Account Component.
12. Click the Item Summary link. 
    **Note**: The Item Summary page displays account information by Item Type per Term, the Item Amount and the Item Balance (i.e. amount owing) for that particular item with due dates.
13. Click the **Return** link to go back to the Customer Account Component.
14. Click the Items by Term link. 
    **Note**: The Item by Term page displays for each term the total payments, total charges and the net balance for the term. Click on View All to view additional terms if necessary.
15. Click the **Return** link to go back to the Customer Account Component
16. Click the Items by Date link. 
    **Note**: The Items by Date page displays a custom sort-able list of each Item Type by date, with a running total. Followed by each invoice date and due date.
17. Click the Return link to go back to the Customer Account Component.
18. Click the **Due Charges** link. 
    **Note**: The Due Charges page displays any amounts due according to due date with a running total.
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<th>Student Financials</th>
<th>Quick Reference Guide</th>
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<tr>
<td>19. Click the <strong>Return</strong> link to go back to the Customer Account Component.</td>
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| 20. Click the **Payment Plans** link.  
**Note**: The Payment Plan page displays any payment plans the student might have. This list is both payment plans and third party contracts linked to the students’ accounts. | |
| 21. Click the **Return** link to go back to the Customer Account Component. | |
| 22. **End of Procedure.** | |