View Customer Accounts

Purpose: Use this document as a reference to understand how to view a customer (student) account. Student Financials contains detailed financial information for every student – registration charges, payments, course fees and penalty fines, financial aid, et al.

Audience: Campus Solutions staff, Student Financials staff, Financial Aid staff.

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

- ZC SF Running Start
- ZD SF Customer Accounts
- ZD SF Running Start
- ZZ SF Customer Accounts
- ZZ SF Running Start

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

The Customer Accounts page gives an overview of the student's activity for the term. You can drill down to review information on the student's account using various links. The total on the student's account can include a dollar amount from a previous term. The **Anticipated Aid** amount is the total the student might receive for the current academic year. It is not the total for the term you are currently viewing.

Navigation: Student Financials > View Customer Accounts

1. The Customer Accounts search page displays.
2. Enter **Business Unit**.
3. Enter the student **ID**.
   a. Alternatively select the looking glass to select from a list of students or enter a name into the Last and/or First Name fields.
4. Select **Search**.
5. The **Customer Accounts** page displays.
6. Select the **Additional Information** arrowhead to display links to related pages.
7. Select the **Account Details** link.
8. The **Account Details** page displays. It shows the:
   - **Total Balance**

- **Total Debits**
- **Total Credits**
- **Total Payments**
- **Last Activity Date**
- **Outstanding Balance**

9. Select **Item Details**.
10. The **Item Details** for charges or the **Payment Details** page displays for payments.
11. The **Item Details** and **Payment Details** pages show the particulars for the item, including posted date, due date, reference number and account.
12. Select **Return** to re-display the **Account Details** page.
13. Select **Return** again to re-display the **Customer Accounts** page.
14. From the **Customer Accounts** page, select to expand the **Additional Information** group box and select the **Detail Transactions** link.
15. The **Detail Transactions** page displays, and provides item type descriptions on the student's account. It will also show you all the charges and payments by item number. You can select any of the headers to reorder the rows. There is also an expand button to view both tabs at once.
16. Select **Return** to re-display the **Customer Accounts** page.
17. From the **Customer Accounts page**, select the **Item Summary** link.
18. The **Item Summary** page displays, and is useful for seeing all the item types at once. This is a good image to see how the **"View All"** link helps to minimize how much detail is or is not displayed.
19. Select **Return** to re-display the **Customer Accounts** page.
20. From the **Customer Accounts** page, select the **Items by Term** link.
21. The **Items by Term** page displays, and shows detail information about the item types on the student's account by term. Use the arrows towards the top for viewing other terms. Included are:
    - **Posting Date**
    - **Effective Date**
    - **Line Totals**
    - **Outstanding Balances**
    - **Optional** - you can select the grid icon to display this detail in an Excel doc
22. Select **Return** to re-display the **Customer Accounts** page.
23. From the **Customer Accounts** page, select the **Items by Date** link.
24. The **Items by Date** page displays, wherein you can sort the item types based on:
    - **Posted Date**
    - **Effective Date**
    - **Bill Date**
    - **Due Date**
    - **Optional** - you can select the grid icon to display this detail in an Excel doc
25. Select **Return** to re-display the **Customer Accounts** page.
26. From the **Customer Accounts** page, select the **Due Charges** link.
27. The **Due Charges** page displays, and shows the item types with an outstanding balance along with when the charges are due.
28. Select **Return** to re-display the **Customer Accounts** page.

29. From the **Customer Accounts** page, select the **Payment Plans** link.
30. The **Payment Plans** page displays, and shows detail information about any payment plans associated with the student. This includes any third party contracts associated with the student.
31. Select **Return** to re-display the **Customer Accounts** page.
32. From the **Customer Accounts** page, select the **Academic Information** link.
33. The **Academic Information** page displays, and shows the enrollment activity by term for the student. You can also view the academic plan the student is associated with. Concurrent students will have more than one of the same terms.
34. You may need to select the **View All** button to see if there is more than one of the same term. The **Enrollment** link drills down to view student's specific class information.
35. Select **Return** to re-display the **Customer Accounts** page.
36. Process to review **Customer Accounts** complete.

Video Tutorial

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

Video Tutorial via Panopto

View the link to **View Customer Accounts**. This link will open in a new tab/window.