Viewing Customer Accounts

Purpose: The following table describes how to view customer accounts.

Step	Action
1.	Navigating to the **View Customer Accounts** page: Select **Main Menu › Student Financials › View Customer Accounts** Favorites : Main Menu > Student Financials > View Customer Accounts **Customer Accounts** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Maximum number of rows to return (up to 300): 300 Business Unit: = ▼ UNICS ID: begins with ▼ National ID: begins with ▼ Campus ID: begins with ▼ Last Name: begins with ▼ First Name: begins with ▼ ☐ Case Sensitive Search Clear Basic Search Save Search Criteria
2.	Enter the appropriate search criteria. Click the **Search** button. *Result:* The **Customer Accounts** page displays. **Customer Accounts** Business Unit: UNICS Pace,Maurice ID: SF700 Academic Information Total: 12,176.50 Anticipated Aid: 0.00 Find | View All First ◀ 1-5 of 5 ▶ Last 	Account Type	Account Number	Balance	Open Date	Status		 Tut Fees | TUT&FEE001- SPRING 2011 | 2,695.00 USD | 03/01/2011 | Active | Account Details Tut Fees | TUT&FEE001- FALL 2010 | 1,568.75 | 03/01/2011 | Active | Account Details Tut Fees | TUT&FEE001- SUMMER 2010 | 2,046.50 | 03/01/2011 | Active | Account Details Tut Fees | TUT&FEE001- SPRING 2010 | 3,318.00 | 03/01/2011 | Active | Account Details Tut Fees | TUT&FEE001- FALL 2009 | 2,548.25 | 02/28/2011 | Active | Account Details Go to: Detail Trans Item Summary Items by Term Items by Date Due Charges Payment Plans Return to Search Notify

Step	Action
3.	Click the **Academic Information** link to view *Bio/Demo* and *Career Term Data*. Click the **Return** link at the bottom of the page to return to the **Customer Accounts** page. **Customer Accounts** **Academic Information** **Bio/Demo Data** ID: SF700 Name: Pace,Maurice Gender: Unknown Citizenship Find | View All First ◄ 1 of 1 ► Last Country Description National ID Find | View All First ◄ 1 of 1 ► Last NID Type National ID Social Security Number 845771414 **Career Term Data** Find | View All First ◄ 1-4 of 7 ► Last Term Career Prim Prog Residency Group Units Tot Units Level Acad Load 2011 FALL UGRD INTT Resident 13.000 63.000 SophomoreFull-Time Academic Plan Enrollment 2011 SUMR UGRD INTT Resident 7.000 50.000 SophomoreHalf-Time Academic Plan Enrollment 2011 SPRG UGRD INTT Resident UGRDTUIT 9.000 43.000 Sophomore3/4 Time Academic Plan Enrollment 2010 FALL UGRD INTT Resident UGRDTUIT 5.000 34.000 Freshman Less 1/2 Academic Plan Enrollment Return
4.	Click the **Account Details** link for any account to view additional detail. Click the **Return** link at the bottom of the page to return to the **Customer Accounts** page. **Account Details** ID: SF700 Pace,Maurice Business Unit: UNICS Account Number: TUT&FEE001- 2011 SPRG Account Balance: 2,695.00 Debits: 2,695.00 Credits: 0.00 Applied: 0.00 Unapplied: 0.00 Find | View All First ◄ 1-3 of 7 ► Last Item Term Amount Class Item Status Last Activity Date Balance Mandatory Building Fee 2011 SPRG 117.50 Item Details Active 03/01/2011 117.50 Mandatory Health Facility Fee 2011 SPRG 14.50 Item Details Active 03/01/2011 14.50 Mandatory Health Fee 2011 SPRG 86.00 Item Details Active 03/01/2011 86.00 Return *Note:* By default, three items display. To see all items, click **View All**.

Step	Action
5.	Use the **Go to:** menu at the bottom of the page to view additional detailed pages.

Link	Description
Detail Trans	**Detail Trans** Business Unit: UNICS ID: SF700 Pace,Maurice Customize | Find | View All | ⬚ | ⬚ First ◀ 1-35 of 35 ▶ Last Item Description / Item Detail 	Item Nbr	Line Seq Nbr	Term	Account Nbr	Account Term	Item Type	Item Amt	 | 000000000000008 | 1 | SPRING 2011 | TUT&FEE001 | SPRING 2011 | Mandatory Health Facility Fee | 14.50 | | 000000000000031 | 1 | SPRING 2010 | TUT&FEE001 | SPRING 2010 | Mandatory Health Fee | 83.00 | | 000000000000021 | 1 | FALL 2010 | TUT&FEE001 | FALL 2010 | Undergrad Resident Tuition | 1,275.00 |
Item Summary	**Item Summary** Business Unit: UNICS ID: SF700 Pace,Maurice Customize | Find | View All | ⬚ | ⬚ First ◀ 1-10 of 35 ▶ Last Item Description / Item Due Date 	Item Type	Term	Account Number	Account Term	Item Amt	Balance	 | Mandatory Building Fee | SPRING 2011 | TUT&FEE001 | SPRING 2011 | 117.50 | 117.50 | | Mandatory Building Fee | FALL 2010 | TUT&FEE001 | FALL 2010 | 117.50 | 117.50 |
Items by Term	**Items By Term** Business Unit: UNICS ID: SF700 Pace,Maurice Find | View All First ◀ 1 of 5 ▶ Last | Term	Total Credits	Total Debits	Antic Aid	Total	Total Incl Antic Aid | | 2009 FALL | 0.00 | 2,548.25 | 0.00 | 2,548.25 | 2,548.250 | Customize | Find | View All | ⬚ | ⬚ First ◀ 1-7 of 7 ▶ Last | Item Type	Date Posted	Item Effective Date	Line Total	Item Balance | | Mandatory Building Fee | 02/28/2011 | 02/23/2011 | 117.50 | 117.50 | | Mandatory Health Facility Fee | 02/20/2011 | 02/20/2011 | 14.50 | 14.50 |

Step	Action
6.	(Cont. **Go to:** menu)

Link	Description
Items by Date	
Due Charges	
Payment Plans	