

Department	Student Accounts
Responsibility/Role	SA 9.0 - Student Financials
File Name	
Version	1.0
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Last Changed by	Jeffrey Duly
Status	Active

The purpose of this document is to outline the steps to navigate through the View Customer Accounts screens.





Step	Action
1.	Begin by navigating to the Student Financials -> View Customer Accounts link.
2.	Enter VANDU in the Business Unit .
3.	Search on any of the ID (student ID), National ID (SSN), Last Name or First Name fields and click on the Search button. You can search by partial Commodore ID, SSN (in the National ID Field) or Name.



Customer Accounts



ID: Academic Information

Total: 22,681.00 Anticipated Aid: 15,000.00



Go to: Detail Trans Item Summary Items by Term Items by Date Due Charges Payment Plans View Anticipated Aid

Step	Action
4.	Click on the Account Details link for detailed account activity for the term you choose.



Account Details

ID: Business Unit: VANDU

Account Number: STU001 - 2011S Account Balance: 22,681.00

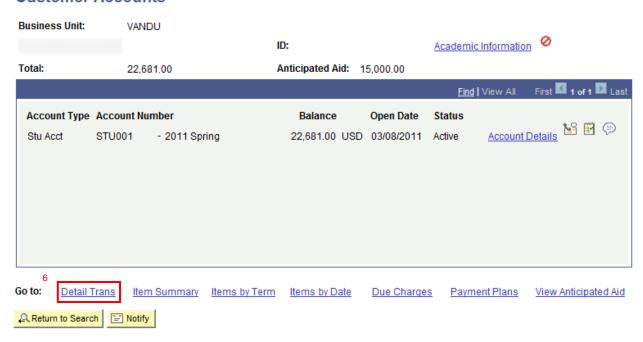
Debits:	22,681.00	Credits:	0.00 Applied	d: 0.00	Unapplied:	0.00
				<u>Find</u> Vie	ew All First 🛚	1-3 of 3 Last
Item		Term		Amoun	t	
Class		Item Status	Last Activity D	ate Balance	•	
ACT & REC	FEES-PROF	2011S Active	03/08/2011	193.00 193.00	Item Details	
INTL STUDE	ENT HEALTH INSUR	2011S Active	03/08/2011	1,071.00 1,071.00	Item Details	
OGSM TUIT	ION-MBA	2011S Active	03/08/2011	21,417.00 21,417.00	Item Details	

5 <u>Return</u>

Step	Action
5.	Always click the Return link to return to the main Customer Accounts screen.



Customer Accounts

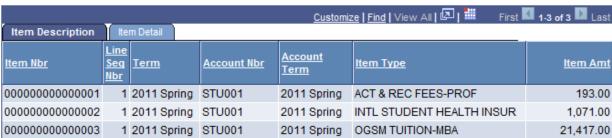


Step	Action
6.	Click the Detail Trans link for detailed account activity.

Detail Trans

Business Unit:

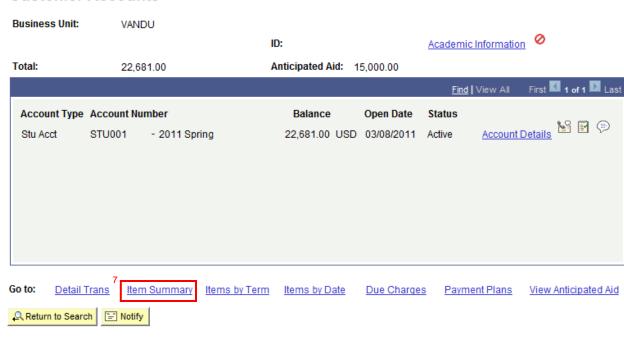
ID:



Return



Customer Accounts



Step	Action
7.	Click the Item Summary link for a summary of account items.

Item Summary

Business Unit:

ID:

Item Description Item Due Date		<u>Cus</u>	tomize <u>Find</u> View	/ A∥ 🔼 🎹 First	1-3 of 3 Last
Item Type	Term	Account Number	Account Term	<u>ltem Amt</u>	<u>Balance</u>
ACT & REC FEES-PROF	2011 Spring	STU001	2011 Spring	193.00	193.00
INTL STUDENT HEALTH INSUR	2011 Spring	STU001	2011 Spring	1,071.00	1,071.00
OGSM TUITION-MBA	2011 Spring	STU001	2011 Spring	21,417.00	21,417.00

Return



Customer Accounts



Total: 22,681.00 Anticipated Aid: 15,000.00



GO to:	Detail Trans	item Summary	items by Ferm	items by Date	Due Charges	Payment Plans	view Anticipated
₽ Retur	n to Search	"=" Notify					

Step	Action
8.	Click the Items by Term link for a summary of account items grouped by term.

Items By Term

Business Unit: VANDU

ID:

				Find View All	First 2 of 2 Last
Тегт	Total Credits	Total Debits	Antic Aid	Total	Total Incl Antic Aid
20118	0.00	22,681.00	0.00	22,681.00	22,681.000
			<u>Customize</u> <u>Find</u> View .	All 🖾 🎹 🛮 Firs	st 💶 1-3 of 3 🗅 Last
<u>Item Type</u>		<u>Date Posted</u>	<u>Item Effective Date</u>	<u>Line Total</u>	<u>Item Balance</u>
ACT & REC F	EES-PROF	03/08/2011	03/08/2011	193.00	193.00
INTL STUDE	NT HEALTH INSUR	03/08/2011	03/08/2011	1,071.00	1,071.00
OGSM TUITIO	N-MBA	03/08/2011	03/08/2011	21,417.00	21,417.00

Return

Last changed on: 7/9/2012 8:25 AM Page 7



Customer Accounts



Step	Action
9.	Click on the Items by Date link for a summary of account items sorted by date.

Items By Date

Business Unit: VANDU

03/08/2011

03/08/2011

ID:



INSUR

ACT & REC FEES-PROF

INTL STUDENT HEALTH

04/30/2011

04/30/2011

Return

03/08/2011

03/08/2011

2011 Spring

2011 Spring

21,610.00

22,681.00

193.000

1,071.000



Customer Accounts



ID: Academic Information

Total: 22,681.00 Anticipated Aid: 15,000.00



Return to Search Notify

Step	Action
10.	Click on the Due Charges link for a list of account items including the amount
	remaining due for each item.

Due Charges

Business Unit: VANDU

ID:

By Due Date			<u>Find</u> View All	First 1 of 1 Last
Due Date	Due Amount	Total Due		
04/30/2011	22,681.00	22,681.00		

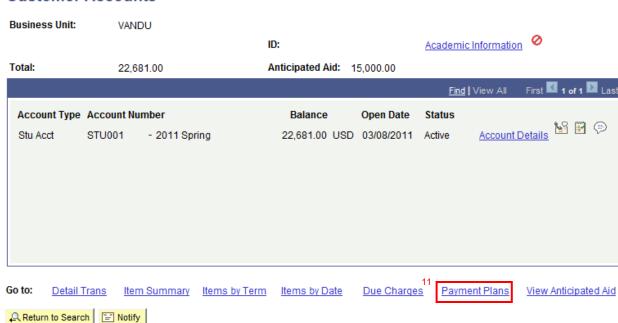
By Item				<u>Find</u> Vie	w All First 🚺	1-3 of 3 Last
Item Type	Item Term	Account Nbr	Account Term	Due Date	Due Amt	Total Due
ACT & REC FEES-PROF	2011S	STU001	2011S	04/30/2011	193.00	193.00
INTL STUDENT HEALTH INSUR	2011S	STU001	2011S	04/30/2011	1,071.00	1,264.00
OGSM TUITION-MBA	2011S	STU001	2011S	04/30/2011	21,417.00	22,681.00

Return

Last changed on: 7/9/2012 8:25 AM Page 9



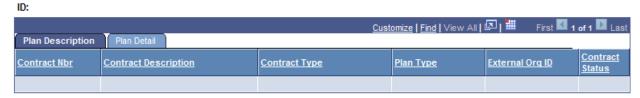
Customer Accounts



Step	Action
11.	Click on the Payment Plans link if the student has a payment plan.

Payment Plan

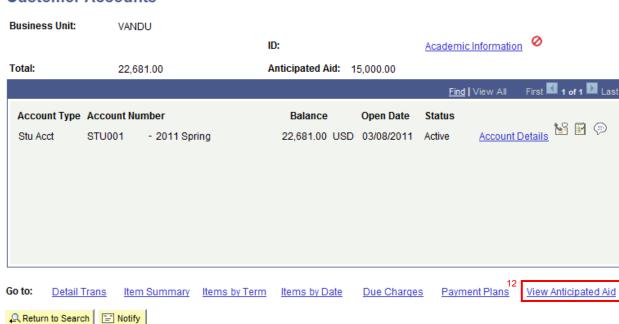
Business Unit: VANDU



Return



Customer Accounts



Step	Action
12.	Click on the View Anticipated Aid link to see any anticipated financial aid for the student.

Anticipated Aid Details



Return

Page 11