# Viewing Customer Accounts

1. Click the **Student Financials** link.

2. Click the **View Customer Accounts** link.

3. Enter the appropriate Business Unit into the **Business Unit** field.

4. Enter lookup information about the student in the remaining fields.
   For this example, we'll enter the student's MaineStreet ID into the **ID** field.

5. Click the **Search** button.

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

   The top section of the page identifies the student to whom the record belongs, the MaineStreet **ID, Total** of charges and a link to the student's **Academic Information**.

   Click the **Academic Information** link.

7. On the **Academic Information** page, you can verify information about the student's **Academic Career, Program, Residency Group, Units, Level** and **Academic Load** for each **Term** and **Institution**.

   Click the **Return** link to return to the **Customer Accounts** page.

8. The bottom section of the **Customer Accounts** page provides a summary of the status of all account types (admission fees, tuition, excess payments ...) for the student, including the **Account Type, Account Number, Balance, Status** and links to **Account Details** for each account.

   **Note:** If necessary, click the **View All** link to make certain all transactions are displayed.

   The links at the bottom of the page let you access different views of the students financial record.

   Click on the **Account Details** link to open the **Account Details** page.
9. 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.

   Click on the **Item Details** link for an item to open the **Line Details** page and view additional details about the line item.

10. The **Line Details** page displays the detail for each individual item on the student account. The **Item Type** number and description are displayed along with the **Item Number**. The posted, **Effective**, **Billed**, **Due**, and **GL Posted** dates are also displayed on this page.

   This page will display the payments that “pay” for a charge transaction.

   Click the **Return** link to return to the **Account Details** page.

11. Click the **Return** link to return to the **Customer Accounts** page.

12. Click the **Detail Trans** link to open the **Detail Trans** page.

13. The **Detail Trans** page lists debits and credits that have been applied to the student's account that can be sorted by **Item Type** etc.

   Click the **Return** link.

14. Click the **Item Summary** link.

15. 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.

   Click the **Return** link.

16. Click the **Items by Term** link.

17. The **Items 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.

   Click the **Return** link.

18. Click the **Items by Date** link.

19. The **Items by Date** page displays the **Item Type** by either **Posted Date** (i.e. date posted), **Effective Date**, **Bill Date** or **Due Date**. It allows you to define a date range (from and to).

   Click the **Return** link.
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<thead>
<tr>
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<tbody>
<tr>
<td>20.</td>
<td>Click the <strong>Due Charges</strong> link.</td>
</tr>
<tr>
<td>21.</td>
<td>The <strong>Due Charges</strong> page displays any amounts due according to due date.</td>
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<td></td>
<td>Click the <strong>Return</strong> link.</td>
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<tr>
<td>22.</td>
<td>Click the <strong>Payment Plans</strong> link to view payment plans created in MaineStreet.</td>
</tr>
<tr>
<td>23.</td>
<td>The <strong>Payment Plan</strong> page displays any payment plans the student might have.</td>
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<td></td>
<td>Click the <strong>Return</strong> link.</td>
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<tr>
<td>24.</td>
<td><strong>End of Procedure.</strong></td>
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