# Viewing Customer Accounts

**PATH: Main Menu > Student Financials > View Customer Accounts**

This document will cover how to view a student’s account in *Campus Solutions*. Please note:

* A student’s account is only viewable once a charge or credit transaction has been posted.
* As of Fall 2016, tuition and fees are calculated under these conditions:
  + - * tuition is ready to be calculated (after the UC Regents meet and approve the fee amounts)
      * the student has enrolled in at least 1 unit
      * a student changes enrollment by dropping or adding a class
* In the previous system, due dates fell on the 15th of a month. Due dates in *Campus Solutions* are dynamic and can fall on any day of the month.

|  |  |
| --- | --- |
| 1. Log into Campus Solutions. 2. Using either the Classic Menu or the Navigator icon, navigate to Main Menu > Student Financials > View Customer Accounts. |  |

|  |  |
| --- | --- |
| The **Customer Accounts** search page displays.   1. Enter the **Student** **ID**. 2. Click the **Search** button. |  |

|  |  |
| --- | --- |
| 1. The **Customer Accounts** page displays.   At the top, the **Total** balance and **Anticipated Aid** show.  Anticipated Aid is aid that has been awarded but not yet disbursed.  The **Account Type** of **ALLFEES** is listed. Account Types are used to classify charges. ALLFEES is the most common Account Type.  The remaining **Balance** for each term is shown. |  |
| 1. Click on the **Account Details** link to view the transactions for this term. |  |
| 1. Click on **View All** to see all transactions. |  |
| 1. Click **Item Details** for a specific line item, to view its details, including:  * When the item was posted to the account * Due Date for charge transactions * Payments which have been applied to charges   This is the most detailed data for a transaction. |  |
| 1. For charge items, the **Item Amount** total is displayed at the top of the page. The **Applied Amount** represents the credits applied against the charge.   The **Line Details** shows multiple lines for the transaction including relevant dates.  **Payments paying this Charge** shows the credit items that were applied to the charge. |  |
|  |  |
| 1. If the transaction is a credit, **Payment Line Details** displays.   **Account Split for Payment** displays to what accounts the payment has been applied.  **Details** identifies the relevant dates for the transaction; Posted, Effective, Billed, Due and GL Posted.  **Charges the Financial Aid paid** lists the charge transactions paid by this credit.  Click **Return** to return to the **Customer Accounts** page. |  |
| 1. At the bottom of the Customer Accounts page is a box labeled **Additional Information**   Click the **Detail Transactions** link. |  |
| 1. The **Item Description** tab displays each transaction by Item Number. Item numbers are “counters” generated as transactions post.   If the transaction is a payment, a **Payment ID** is displayed. |  |
| The **Item Detail** tab displays relevant dates for the transaction as well as identifying the action used to post it.  Clicking on any of the column headings sorts by that field.  Click **Return** to go back. |  |
| 1. Click on the **Item Summary** link. |  |
| The **Item Summary** page has three tabs and is organized by **Item Type**.  Item Typs are codes created in Student Financials which describe the transaction. They also define the General Ledger accounts to which the transactions will be posted.  The **Item Description** tab shows each Item Type along with the **Term** and **Item Amount**. |  |
| The **Item Due Date** tab displays the Item Type description and Due Date for charge transactions. For credits, no date is displayed. |  |
| If a refund has been processed, a **Refund Number** will display.  The Refund Number is another “counter” to differentiate transactions.  Note: A refund is not a “reimbursement”, it is funds disbursed to the student.  Click **Return** to get back to **Customer Accounts**. |  |
| 1. Click on the **Items by Term** link. |  |
| **Items By Term** displays transactions by term. To change terms, use the arrows in the upper right.  Balances owed for each Item Type are shown in the far right column. |  |
| 1. Click the **Return** link to go back to **Customer Accounts**. 2. Then click on the **Items by Date** link. |  |
| At the top of the page there are 4 date search options: **Posted Date**, **Effective Date**, **Billing Date**, or **Due Date**. The default is Posted Date.  Enter a date range in the **From Date** and **To Date** fields.  Click on the **Search** button.  Negative numbers are credits; positive numbers are charges.  The **Total** column shows a running total of the transactions. |  |
| 1. Click on **Return** at the bottom of the page. 2. Then, click the **Due Charges** link. |  |
| The **By Due Date** section of the page displays the total of transactions by Due Date. With multiple due dates, the **Total Due** shows a running total. |  |
| **By Item** shows the Item Types and their Due Dates along with a running total on the far right.  Click the **Return** link to return to the **Customer Accounts** page. |  |
| 1. If the student is enrolled in a payment plan, click on the **Payment Plans** link to view details. |  |
| Click the **Return** link to go back to **Customer Accounts**. |  |
| 1. Click the **View** **Anticipated Aid** link. |  |
| **Anticipated Aid Details** is a preview of awards.  **Date** is when the aid became anticipated. **Apply Date** is when the aid is expected to disburse. **Expire Date** is when the aid will expire. If the aid expires, it does not disappear from the student’s awards.  Click **Return** to go back to **Customer Accounts**. |  |
| 1. Click the **Return to Search** button to search for another student. 2. Or click the **Actions List** icon to exit *Campus Solutions*. |  |







Support:

For questions or assistance, please contact SIS Support.

* Call 510-664-9000 (press option 6 to reach SIS support)
* Email: [sishelp@berkeley.edu](mailto:sishelp@berkeley.edu)
* Submit a ticket: <https://berkeley.service-now.com/ess/create-incident>