
Customer View: Payments Made

The customer can view when and how manual and system payments were applied. They can also print a payment summary for the calendar year or a date range.

Navigation

Click **View Details** from the home page and then click the **Payments Made** tab.

A specific term can be selected in the **Term** drop-down list if needed.

Payments Made tab

The payments tab includes system processed payments and manually applied payments.

1. The customer can select a timeframe from the drop-down list:

- All
- Past 30 Days
- Past 60 Days
- Past 90 Days
- Date Range

2. The customer can also select whether to view **All** payments, only **Successful** payments, or only **Unsuccessful** payments.

In the payments grid:

- Click the expand icon to view the account detail for each item.
- Click the description link to view payment detail.

Activity Details

Test Customer
Customer Number: 1002363651

Term:
All

[View Payment Summary](#)

[FACTS Payment Processing Policies](#)

[Schedule](#) [Transactions](#) [Balances](#) **[Payments Made](#)** [Changes](#)

Payments Made

Past 90 Days 1

Successful 2

[Expand All](#) | [Collapse All](#)

▼ 29 Jun 20XX	Payer: Test Customer	Online Payment	Amount: \$100.00 View Confirmation
▲ 29 Apr 20XX	Payer: Test Customer	Payment	Amount: \$401.00

NAME	DESCRIPTION	AMOUNT PAID
My Student	Tuition	\$401.00

Detail view

Payment Information ✕

Payment Amount \$100.00
Account Holder Name Test Customer
Bank Name US Bank
Account Type Checking
Routing Number 123456789
Account Number XXXXXXXXXXXXX5555
Submit Date 31 Aug 20XX

NAME	DESCRIPTION	AMOUNT PAID
Test Student	Test Student - Tuition	\$100.00

[Close](#)

Viewing and printing the Payment Summary

This document provides a calendar year or date range summary of payments made, broken down by term and person. The institution tax ID can be included on the form if configured with FACTS.



Note

Institution users can access the printable payment summary by navigating to the Consumer View from the Customer Profile.

Payment Summary Print

i The Payment Summary report is for informational purposes only. It includes payment activity applied to the balance owed to or services rendered by Sample Institution during the selected time frame.

Customer: Test Customer
100 Main St
Lincoln, NE 68508
USA

Sample Institution
121 S. 13th Street
Lincoln, NE 68506
USA
Federal Tax ID: 12-1234567

Choose calendar year or date range

Students: Test Student and My Student

My Student - \$1,200.00

20XX-20XX	Grade - 7th	\$1,200.00				
<table border="1" style="width: 100%;"><thead><tr><th>ACCOUNT</th><th>TOTAL</th></tr></thead><tbody><tr><td>Tuition</td><td>\$1,200.00</td></tr></tbody></table>		ACCOUNT	TOTAL	Tuition	\$1,200.00	
ACCOUNT	TOTAL					
Tuition	\$1,200.00					

Test Student - \$2,200.00

20XX-20XX	Grade - 1st	\$2,200.00						
<table border="1" style="width: 100%;"><thead><tr><th>ACCOUNT</th><th>TOTAL</th></tr></thead><tbody><tr><td>Books</td><td>-\$200.00</td></tr><tr><td>Tuition</td><td>\$2,400.00</td></tr></tbody></table>		ACCOUNT	TOTAL	Books	-\$200.00	Tuition	\$2,400.00	
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