Department	
Responsibility/Role	
File Name	**Account Overview_BUSPROC.doc**
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Last Changed by	
Status	

Account Overview

Trigger:

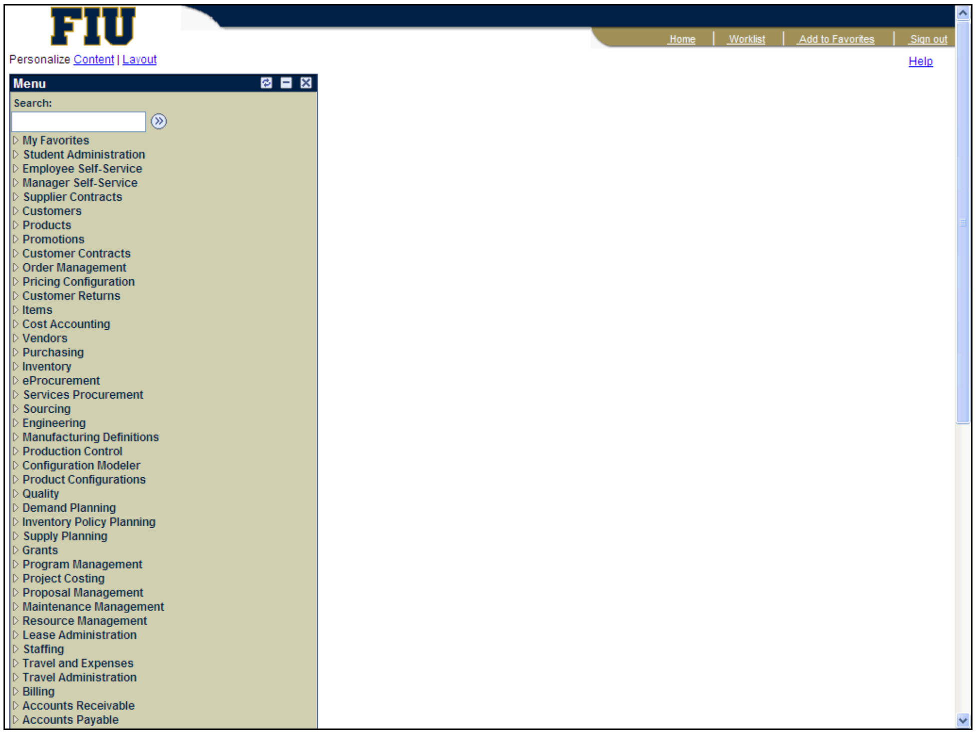
Required Field(s)	Comments

Output - Results	Comments

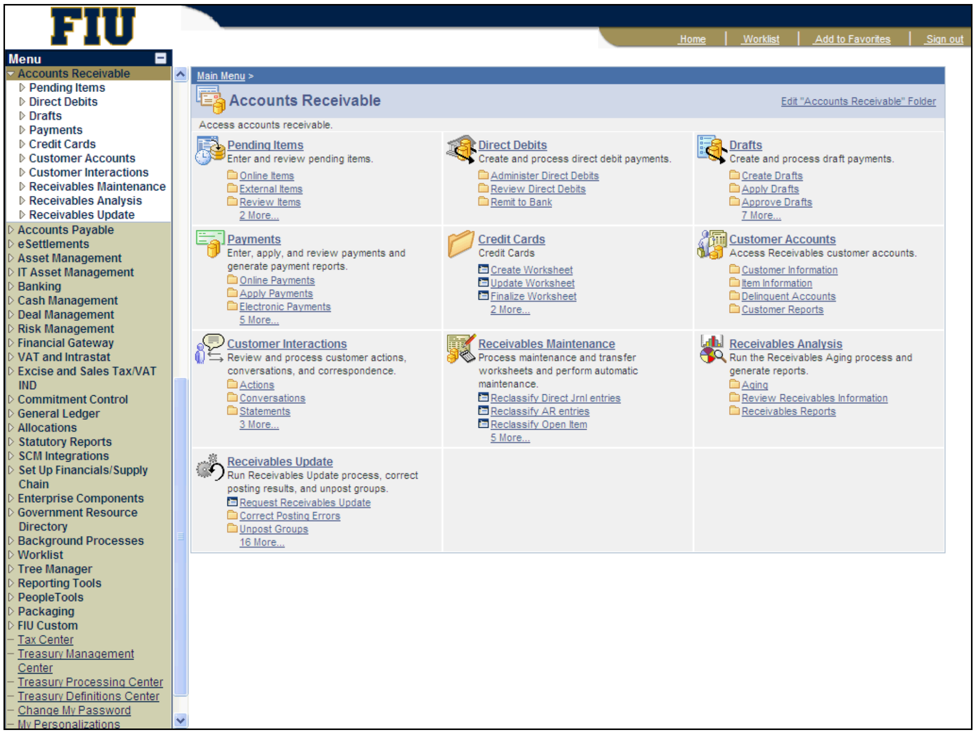
Additional Information

Procedure

Use the **Account Overview Inquiry** tool to view sponsor balances, the most recent item and payment activity, and summarized aging information.



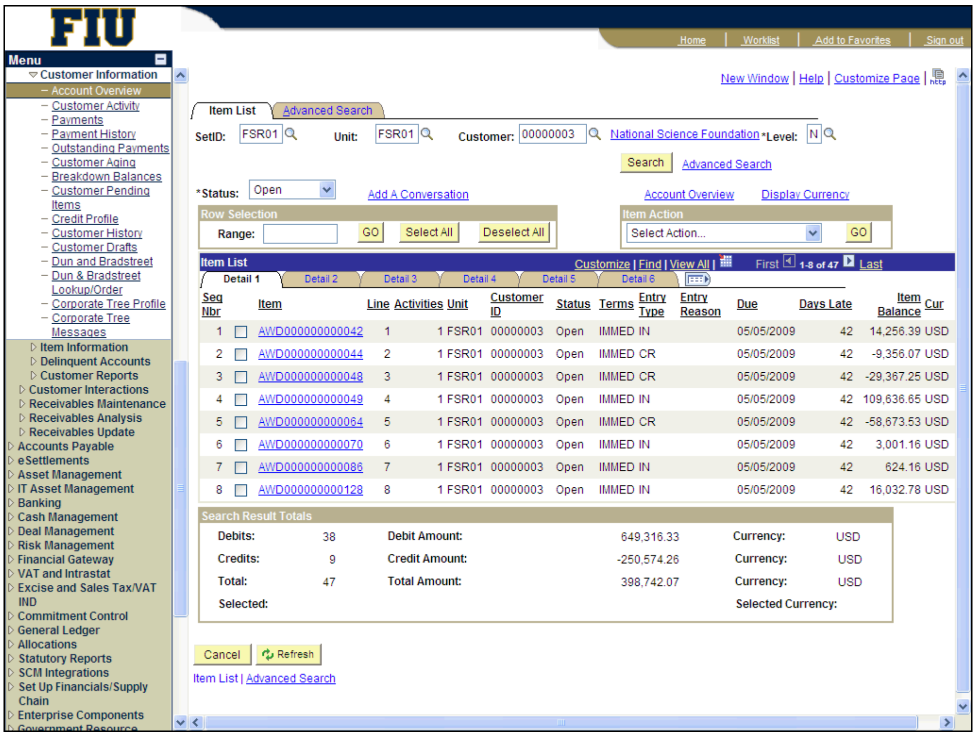
Step	Action
1.	Click the **Vertical** scrollbar.
2.	Click the **Accounts Receivable** link. 



Step	Action
3.	Click the **Customer Accounts** link. ▷ Customer Accounts
4.	Click the **Customer Information** link. ▷ Customer Information

Step	Action
5.	Click the **Account Overview** link. Account Overview
6.	Click in the **Set ID** field. FIU01
7.	Enter the desired information into the **Set ID** field. Enter "**FSR01**".
8.	Click in the **Unit** field.
9.	Enter the desired information into the **Unit** field. Enter "**FSR01**".
10.	Click the **Look up Customer (Alt+5)** button.
11.	**Note**:This page will allow you to select the Customer ID that you would like to view. However, for the purposes of this UPK, select the **highlighted** Customer ID hyperlink. 00000003
12.	Click the **Search** button. Search
13.	**Note:** The Balance tab shows the most recent activity for the Sponsor. It also contains a snapshot of the customer's overall balance and past due amount.

Step	Action
14.	Click the **Balance** link. Balance:
15.	**Note:** This page displays information about the outstanding balance per award ID for the specified customer.



Step	Action
16.	Click the **Home** link. Home
17.	Congratulations. You successfully ran an Account Overview Inquiry. **End of Procedure.**