# Accounts Receivable: Tips to Review Specific Customer Activity

## Overview

- This job aid provides tips to help the Accounts Receivable Specialist review activity associated to Specific Customers

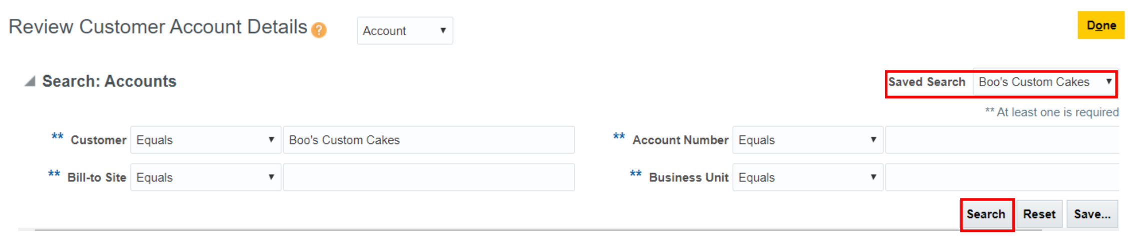
# Accounts Receivable: Tips to Review Specific Customer Activity

## I. How to Review a Specific Customer Account

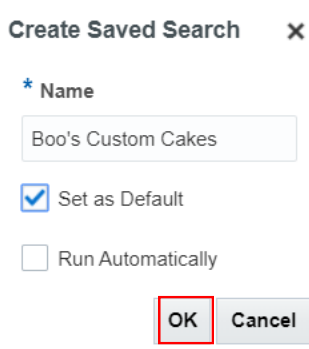
*Note: This can be done from either the Billing or Accounts Receivable modules – the process and results are the same.*

1. From the **Receivables** module, select **Accounts Receivable**. Then click **Review Customer Accounts** in the top right corner.

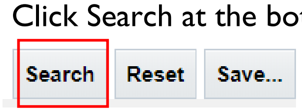

2. Note: The customer search previously created in the Billings module is also available in the Accounts Receivables module. Simply click **Search** or select another Saved Search. Then click **Search**.



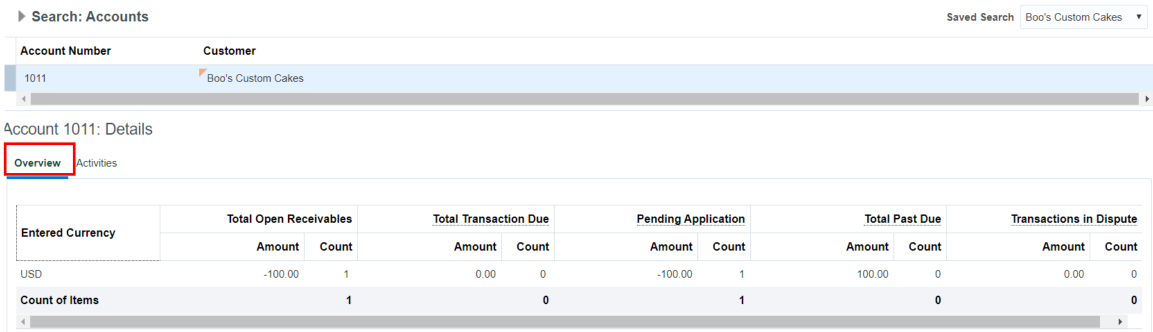

3. Use the Customer Name to Create a Saved Search, then click **OK**.



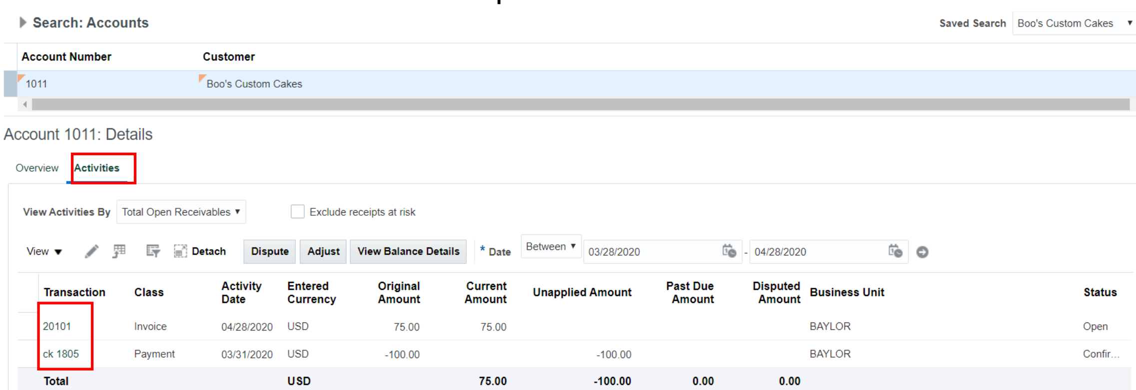

4. Click Search at the bottom right of the screen.



5. The **Overview tab** of this Customer will provide the Total Open Receivables, Total Transactions Due, Pending Applications, Total Past Due and Transactions in Dispute.




6. Click on the **Activities tab** to view specific transaction details.




   a. Click on the **transaction hyperlinks** to review each specific transaction.

7. Click **Done** in the top right corner when review of this customer is complete.