Overview

- This job aid provides tips to help the Accounts Receivable Specialist review activity associated to Specific Customers
1. 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.

![Overview tab](image)

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

![Activities tab](image)

   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.