

## Student Financials - Portal Navigation - PS 9.0

### View Accounts

1. View Customer Account  
**Student Financials > View Customer Accounts**
2. View Corporate Account  
**Student Financials > View Corporate Accounts**

### Look up External Org ID#

1. Pull Organization Location Summary  
**Campus Community > Organization > Review Organizations > Organization Location Summary**  
*Tip: Enter first letter of Search Name and full City and State if possible to help narrow search results - otherwise, it only pulls a max of 300 records*

### Bio Demo Info

1. View Addresses  
**Campus Community > Personal Information > Biographical > Addresses/Phones > Addresses**
2. View Phone Numbers  
**Campus Community > Personal Information > Biographical > Addresses/Phones > Phones**
3. View Email Addresses  
**Campus Community > Personal Information > Biographical > Addresses/Phones > Electronic Addresses**

### Queries

1. Run Queries  
**Reporting Tools > Query Viewer**
2. Add Queries to Favorites  
**Reporting Tools > Query Viewer - pull up query list - select Favorite beside query**
3. Schedule Queries to run later  
**Reporting Tools > Query Viewer - pull up query list - select Schedule beside query**

### Reports

1. Run Accounts Receivable Aging Report  
**NDU Applications > NDU Student Financials > Report > NDU Aging Report**  
  
To request access to report, go to Student Account Services website:  
<http://www.und.edu/dept/studentaccounts/Forms> > Employee Forms > Accounts Receivable Aging Report  
Email completed form to Melissa Dietrich at [melissadietrich@mail.und.nodak.edu](mailto:melissadietrich@mail.und.nodak.edu)  
Instructions for how to run the Aging Report are also on the Employee Forms page as a PDF file

### Tips and Tricks!

1. Pull detail account transactions into Excel  
**Student Financials > View Customer Accounts > Items by Date - click red/white/blue grid box in blue bar**
2. Sort detail account transactions by headers  
**Student Financials > View Customer Accounts > Items by Date - click on any header to sort by that field (i.e. sort by Item Type)**
3. UPK = User Productivity Kit  
**Click Help from any screen, then "UPK" to pull up the UPK and see how to do something**
4. Queries  
**Can hit Enter on keyboard - do not have to use mouse to click**

### Student Account Services - 9.0 Upgrade Contacts:

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