Post Student Transactions

Path:  Student Financials > Charges and Payments > Post Student Transactions

1. In the **ID** field, enter the appropriate ID. To select an ID from the Lookup List, click to the right of the field. On the Lookup ID page, type the student’s name and then click [Look Up]. A list of IDs is displayed.  
   **Note:** You may need to click [View All] for all IDs to appear.

2. Next to the **Account Type** field, click to select the appropriate Account Type.

3. In the **Item Type** field, enter the **Item Type** number if you know it, or click to view the corresponding Item Types. Click [View All] to view the first 300 results.  
   **Tip:** Enter a partial number in the Item Type field, and then click [Look Up]. Only the Item Types beginning with that number will appear in the Search Results list.

4. Click [Add]

5. In the **Amount** field, enter the appropriate amount.

6. In the **Term** field, type the 4-digit Term code.

7. In the **Reference Number** field, enter a brief detailed description of the transaction you are posting.

8. In the **Due Date** field, enter the date the charge is due. Add two weeks to today’s date so the student can be notified of the charge via email.  
   **Tip:** Click the [ ] to select a date.

9. Click [Post]

10. To verify the posting, at the bottom of the page, click [Student Accounts].

11. Click [Account Details] for the Account Type and Term you posted in.

12. To return to the Students Accounts page, click [Return] at the bottom of the page.

13. To return to the Student Post page, click [Return] at the bottom of the page.

14. To post another charge, click [New Transaction].