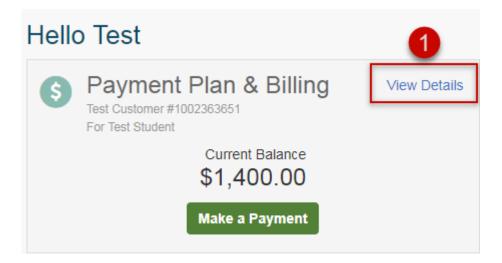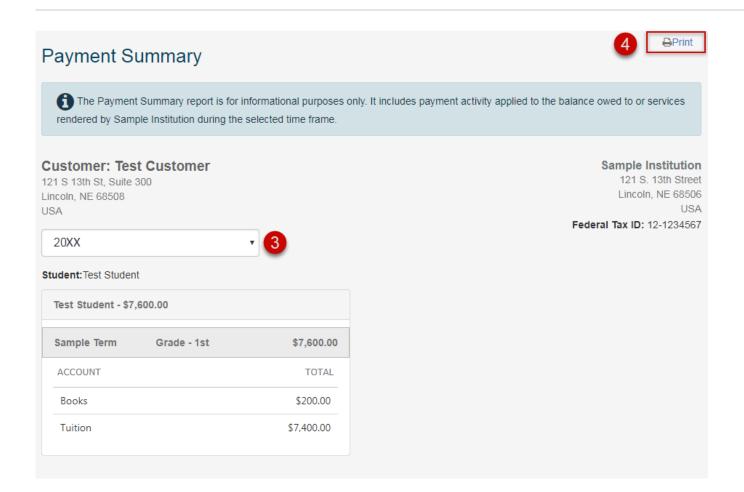# Printable Payment Summary

The Payment Summary shows the total paid for each of the accounts (i.e. Tuition, Day Care, etc.) for each student. The customer can select a year or a date range for the summary. It also includes the school's address and Federal Tax ID, if provided. While many expenses may not be applicable for tax deductions, some families keep record of the expenditures with their taxes.

Steps to printing the payment summary

1. On the home page, click **View Details**.
2. Click **View Payment Summary** on the details screen.
3. Ensure the correct **Calendar Year** or date range is selected.
4. Click **Print**.

Payment Summary

4 🖶 Print

ℹ The Payment Summary report is for informational purposes only. It includes payment activity applied to the balance owed to or services rendered by Sample Institution during the selected time frame.

Customer: Test Customer
121 S 13th St, Suite 300
Lincoln, NE 68508
USA

Sample Institution
121 S. 13th Street
Lincoln, NE 68506
USA
Federal Tax ID: 12-1234567

20XX ▾	**3**

Student: Test Student

Test Student - $7,600.00		
Sample Term	Grade - 1st	$7,600.00
ACCOUNT		TOTAL
Books		$200.00
Tuition		$7,400.00

Note for Payment Forms users
Payments made through Payment Forms are on a separate term from the tuition term. Also, they are not tied to the customer's user account so the customer does not have access to a Payment Summary for the Payment Forms term. However, they are sent a payment receipt each time they make a payment through Payment Forms.

Institution users can navigate to the **Customer Profile: Consumer View** for the customer record on the Payment Forms term. Keep in mind that a customer record is created for each form/payment completed.