



University of the Philippines



SAIS

Student Academic Information System



SAIS User Manual

Student Financials

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Creation Date: 13 March 2015
Last Updated: 13 March 2015
Document Ref: SAIS User Manual – View Customer or Corporate Accounts
Version: 1.1

Approvals:

Recommending Approval _____

Approved _____

1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference
13 March 2015	Stephen Ko	1.0	No Previous Document
13 March 2015	Sarah Cortijos	1.1	Added Document Control Numbers Edited Format

1.2 Reviewers

eUP Core Technical Committee

Name	Project Role
Prof. Rowena Solamo	Team Lead eUP Quality Assurance Team



View Customer and Corporate Accounts





UNIVERSITY OF THE PHILIPPINES

STEP 1. Log into SAIS using the provided username and password. Click the **Sign In** button.

<p>User ID: <input type="text"/></p> <p>Password: <input type="password"/></p> <p>Sign In</p>	<p>Welcome to the UP Student Academic Information System</p>
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If you have problems or concerns, please read our FAQs at <http://e.up.edu.ph/faq-sais/>. You may contact the eUP Helpdesk via email at helpdesk@up.edu.ph or through phone at (02) 376-3100.

The screenshot displays the SAIS user interface. On the left is a vertical navigation menu with the following items: Financial Aid, **Student Financials**, Tuition and Fees, Charges and Payments, Bill Customers, Cashiering, Payment Plans, International Health Coverage, Refunds, Collections, GL Interface, StudyLink, Taxes, Student Financials NLD, **View Customer Accounts**, **View Corporate Accounts**, View Item Due, View Item Line, View Corporate Item Due, View Corporate Item Line, View Corporate Item, Academic Advisement, Contributor Relations, SA Integration Pack, Set Up HRMS, Set Up SACR, Enterprise Components, Worklist, Application Diagnostics, Tree Manager, Reporting Tools, and PeopleTools. The main area is a grid of 12 panels. The top row contains 'Refunds', 'Collections', and 'GL Interface'. The second row contains 'StudyLink', 'Taxes', and 'Student Financials NLD'. The third row contains 'View Customer Accounts', 'View Corporate Accounts', and 'View Item Due'. The fourth row contains 'View Item Line', 'View Item', and 'View Corporate Item Due'. The fifth row contains 'View Corporate Item Line' and 'View Corporate Item'. Red boxes highlight 'Student Financials' in the menu, and 'View Customer Accounts' and 'View Corporate Accounts' in both the menu and the main grid.

STEP 2. On the menu on the left side of the screen, click **Student Financials**.

Click **View Customer Accounts** for students

Click **View Corporate Accounts** for external org

- My Favorites
- Approval Workflow
- General Customizations
- Online Admission Applicator
- SAIS Interface
- Student Learning Center
- Self Service
- Instructor Evaluation
- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
- Student Financials
 - ▷ Tuition and Fees
 - ▷ Charges and Payments
 - ▷ Bill Customers
 - ▷ Cashiering
 - ▷ Payment Plans
 - ▷ International Health Coverage
 - ▷ Refunds
 - ▷ Collections
 - ▷ GL Interface
 - ▷ StudyLink
 - ▷ Taxes
 - ▷ Student Financials NLD
 - View Customer Accounts
 - View Corporate Accounts
 - View Item Due

Customer Accounts

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit: =

ID: begins with

National ID: begins with

Campus ID: begins with

Last Name: begins with

First Name: begins with

Case Sensitive

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1 of 1 Last

Business Unit	ID	Account Balance	National ID Country	NID Short Description	National ID	Date of Birth	Gender	Name	Campus ID	Last Name	First Name
UPBAG	10038981	258.5	PHL	NID	(blank)	(blank)	Female	Cayetano,Almira	200867119	CAYETANO	ALMIRA

STEP 3. Fill out the **Business Unit** field, then enter either the **ID, Campus ID, Last Name, or First Name** of the student for **View Customer Accounts**

For the **View Corporate Account**, Enter the **Business Unit** the press **Search**. Look for the name of the **External Organization** to view the account

Customer Accounts

Business Unit: UPBAG

Cayetano,Almira

ID: 10038981

[Academic Information](#)

Total: 258.50

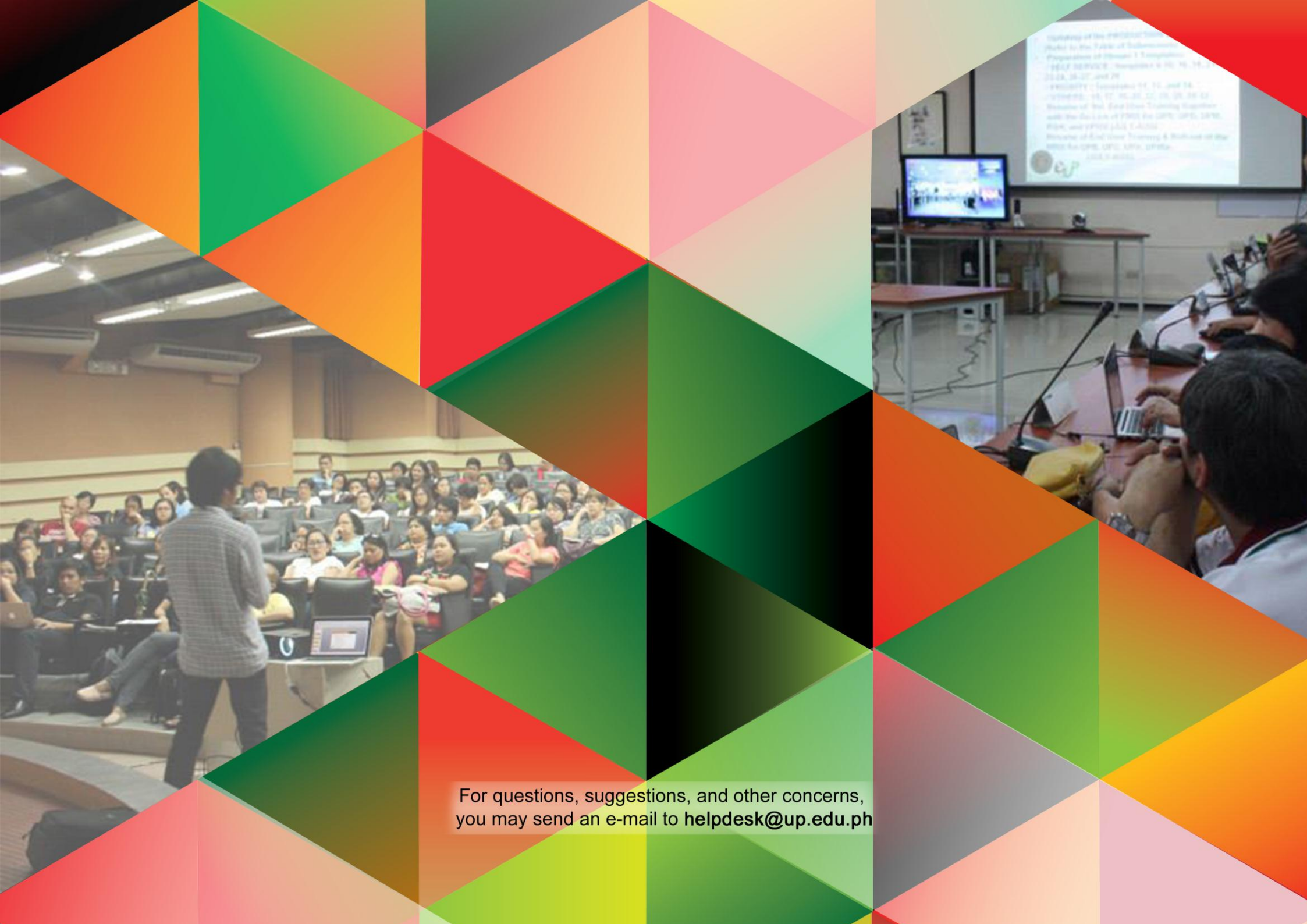
Anticipated Aid: 0.00

						Find View All	First	1-7 of 8	Last
Account Type	Account Number		Balance	Open Date	Status				
Misc Chrg	MIS001	- Second Semester 2014-2015	0.00 PHP	03/11/2015	Active	Account Details			
Std Fund	STF001	- Second Semester 2014-2015	4.00	03/11/2015	Active	Account Details			
Tut Fee	TUT001	- Second Semester 2014-2015	0.00	03/11/2015	Active	Account Details			
Misc Chrg	MIS001	- First Semester 2014-2015	1,405.00	11/03/2014	Active	Account Details			
Oth Fee	OTH001	- First Semester 2014-2015	204.00	11/03/2014	Active	Account Details			
Payment	PAY001	- First Semester 2014-2015	-1,000.00	02/03/2015	Active	Account Details			
Std Fund	STF001	- First Semester 2014-2015	50.50	11/03/2014	Active	Account Details			

STEP 4. The **Total Balance** of the student or the external organization can be seen on the upper left corner of the page. You can also view the breakdown of the student's balance.

You can click the links below (ex. Item summary) to view additional details about the students account.

Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#)



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For questions, suggestions, and other concerns,
you may send an e-mail to helpdesk@up.edu.ph