

## Printable Tax 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**.

The screenshot displays a user interface with two main sections. The top section, titled "Hello Test", contains a "Payment Plan & Billing" card. This card features a dollar sign icon, the text "Payment Plan & Billing", "Test Customer #1002363651", and "For Test Student". It also shows a "Current Balance" of "\$1,400.00" and a green "Make a Payment" button. A red box highlights the "View Details" button, with a red circle containing the number "1" above it. The bottom section, titled "Activity Details", shows "Test Customer" information and a "Customer Number: 1002363651". It includes a "Term:" dropdown menu currently set to "All" and a blue "View Payment Summary" button. A red arrow points to this button, with a red circle containing the number "2" next to it. A link for "FACTS Payment Processing Policies" is also visible.

# Payment Summary

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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

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**Student:** Test Student

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