



Lease Purchase Billing History

Overview: This job aid provides instruction on how to look up billing history in Planon, as part of UPL's Lease Purchase Program.

1. In your preferred web browser, navigate to planon.msu.edu/startpage/BP/statements and login.
2. Adjust the search criteria to the appropriate date range and your account number or org code. Click **Search**.

Lease Service Provider Billing Details

3. The search results matching your selected criteria will appear below the search fields.

Date billed	Chart of accounts code	Account number	Sub account number	Object code	Sub object code	Project code	Org ref ID	Debit or credit code	Lease contract code	Description Item	Item description	Amount	Previous lease balance	Interest	Principal	New lease balance	Item location	Item serial number	Tran date
2/2/2023	MS	GA013671		6501				D	LC000402	688343		\$ 885.91	\$ 46,650.13	\$ 155.50	\$ 730.41	\$ 45,919.72	ANGELL UNIV SERVICES Room:		12/
2/2/2023	MS	XT100009		4022				C	LC000402	688343	Credit	\$ 730.41					ANGELL UNIV SERVICES Room:		12/

4. **Export** the results to CSV using the square button with an arrow, located to the right of the search button. This will allow you to reformat/remove columns for printing, if you would like to keep a copy for your records.



5. For regular monthly billings, there will be three rows per contract representing:
 - a. The total amount withdrawn from the lessee's department account
 - b. The credit applied to the lease principal
 - c. The amount of interest paid
 - i. **Note:** the interest paid line may not appear for early payments made against a lease.

Lease contract	Description	Amount	Previous lease balance	Interest	Principal	New lease balance
LC000402	688343	885.91	46650.13	155.5	730.41	45919.72
LC000402	688343 Credit	730.41				
LC000402	688343 LP Interest	155.5				