Aged Accounts Summary Report

Last Modified on 08/15/2019 9:18 am EDT

The **Aged Accounts Summary** report provides a breakdown of unpaid fees by family. The unpaid fees are divided into various buckets: 0-30 days old, 31-60 days old, 61-90 days old, and older than 90 days. This report is known as an Aged Accounts Receivable report in the accounting industry.

From the Reports menu > Transactions / Financials, the Aged Accounts Summary report can be found under the Recommended and Who Owes Me Money tabs. This report can also be generated from the Aged Accounts on the Executive Dashboard.

- 🜟 Evaluate the health of your Accounts Receivable.
- ★ Expedite collection efforts with the ability to email families directly from the report results.
- Create a listing of allProblem Accounts and the details of their outstanding fees.

Search Criteria

Aged Accounts Summary	
←RETURN ✓SUBMIT	
Search Criteria Q Favorites Save Favorites Refresh ?	Select Show all families to include families with zero
This report displays aged accounts information (30, 60, and 90 days past due) for each family.	balances (no unpaid fees).
Do you want to show all families or only those with unpaid fees?	
○ Show all families	
Only show families with unpaid fe	es
Location ▼	
Days Outstanding ▼	
Status ▼	
ePayment Method ▼	
Problem Account ▼	
Balance from 1.00 through	
✓ SUBMIT	

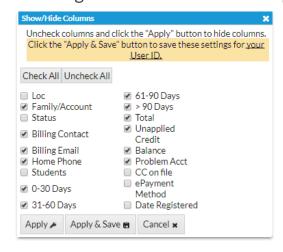


As a default this report is created with the Balance from defaulted to \$1. If you have many families who regularly maintain a credit balance, for example if they often make prepayments, you will want to change it to -\$5,000 so those families will be included in the report.

The Report Results

← RETURN	MAIL					showing	mize your re or hiding co information	lumns of				
iew 1 - 17 of 17	■ Print @ Ex	port Pefresh 6 colum	ns hidden 🔳 Show/	Hide Columns	⊋ Restore C	olumns						
Family/Account	Billing Contact	Billing Email	Home Phone	0-30 Days	31-60 Days	61-90 Days	> 90 Days	Total	Unapplied Credit	Balance	Problem Acct	Email Al
Ager	Holly Ager	hollyager41@gmail.com	(704) 374-2415	232.87	224.13	0.00	0.00	<u>457.00</u>	30.00	427.00	No	
Brown	Janice Brown	jbrownsemail@email.com	(704) 555-1313	150.00	335.00	150.00	0.00	635.00	0.00	635.00	No	✓
	Alane Clements	acleme	504) 555-0100	<u>67.50</u>	50 250.00 401.88			4AA 88				
	-								0.00			
Reimer	Ruby	reimers@email.com	(604) 555-00-	<u>100.25</u>				<u>= 10.75</u>	0.00	148.75		
Shields	Reyna Shields	rshields@email.com	(704) 555-8714	84.38			0.00	135.00	0.00	135.00		
Turner	Sheryl Turner	swalker@email.com	(704) 555-9822	67.50	119.38	<u>67.50</u>	0.00	254.38	0.00	254.38	No	₹
				1,899.88	2,608.85	905.97	250.00	5,664.70	30.00	5,679.70		

• The **Show/Hide Columns** button allows you to customize your report by selecting which information to display.



- Select Apply to have these selections applied to only the report you are currently viewing.
- Select Apply & Save to have these selections applied and saved for your User ID. When logged in as your User ID, you will see only the

columns of information you chose previously. Other Users will see the columns they selected and saved, which may differ from yours.

- Use **Restore Columns** to view all available columns.
- Use the links in the aging columns to see the fees that make up the total.

Family/Account	Billing Contact	Billing Email	Home Phone	0-30 Days	31-60 Days	61-90 Days	> 90 Days	Total
<u>Ager</u>	Holly Ager	hollyager41@gmail.com	(704) 374-2415	232.87	224.13	0.00	0.00	457.00
Brown	Janice Brown	jbrownsemail@email.com	(704) 555-1313	150.00	335.00	150.00	0.00	635.00
Clements	Alane Clements	aclements@email.com	(704) 555-0100	67.50	84.38	0.00	250.00	401.88
<u>Dierksen</u>	Marlene Dierksen	jlintonjr@outlook.com	(704) 555-4446	227.88	212.24	194.12	0.00	634.24
<u>Evans</u>	Taylor Evans	tayevans@email.com	(704) 555-5478	207.13	250.87	194.12		491.75
<u>Fontaine</u>	Angela Fontaine	jlintonjr@outlook.com	(704) 555-7978	85.00	<u>151.25</u>	33.75	0.00	270.00
Golding	Sara Golding	sgolding@email.com	(704) 555-4748		<u>45.00</u>	45.00	0.00	90.00
<u>Harris</u>	Anna Harris	annab@email.com	(704) 555-4200	17.50	34.38	0.00	0.00	51.88
Ingleton	Shannon Ingleton	thisfamilysemail@gmail.com	(704) 349-1699		281.48	246.48	0.00	527.96
<u>Jacobs</u>	Jane Jacobs	jjacobs@email.com	(704) 555-3421	45.00	101.25	<u>11.25</u>		157.50