

Aged Accounts Summary Report

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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 all **Problem Accounts** and the details of their outstanding fees.

Search Criteria

Aged Accounts Summary

← RETURN ✓ SUBMIT

Search Criteria 🔍 Favorites 📌 Save Favorites ✕ Refresh ?

This report displays aged accounts information (30, 60, and 90 days past due) for each family.

Do you want to show all families or only those with unpaid fees?

Show all families

Only show families with unpaid fees

Location

Days Outstanding

Status

ePayment Method

Problem Account

Balance from through

✓ SUBMIT

Select *Show all families* to include families with zero balances (no unpaid fees).



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

Aged Accounts Summary

← RETURN EMAIL

View 1 - 17 of 17 Print Export Refresh 6 columns hidden Show/Hide Columns Restore Columns

Customize your report by showing or hiding columns of information.

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 All
Ager	Holly Ager	hollyager41@gmail.com	(704) 374-2415	232.87	224.13	0.00	0.00	457.00	30.00	427.00	No	<input type="checkbox"/>
Brown	Janice Brown	jbrownsemail@gmail.com	(704) 555-1313	150.00	335.00	150.00	0.00	635.00	0.00	635.00	No	<input checked="" type="checkbox"/>
	Alane Clements	aclements@gmail.com	(704) 555-0100	67.50			250.00	401.88		446.88	Yes	<input type="checkbox"/>
Reimer	Ruby	reimers@gmail.com	(604) 555-0000	40.25	42.50			82.75	0.00	148.75	No	<input type="checkbox"/>
Shields	Reyna Shields	rshields@gmail.com	(704) 555-8714	84.38	50.62	0.00	0.00	135.00	0.00	135.00	No	<input type="checkbox"/>
Turner	Sheryl Turner	swalker@gmail.com	(704) 555-9822	67.50	119.38	67.50	0.00	254.38	0.00	254.38	No	<input checked="" type="checkbox"/>
				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.

Show/Hide Columns

Uncheck columns and click the "Apply" button to hide columns. Click the "Apply & Save" button to save these settings for your User ID.

Check All Uncheck All

<input type="checkbox"/> Loc	<input checked="" type="checkbox"/> 61-90 Days
<input checked="" type="checkbox"/> Family/Account	<input checked="" type="checkbox"/> > 90 Days
<input type="checkbox"/> Status	<input checked="" type="checkbox"/> Total
<input checked="" type="checkbox"/> Billing Contact	<input checked="" type="checkbox"/> Unapplied Credit
<input checked="" type="checkbox"/> Billing Email	<input checked="" type="checkbox"/> Balance
<input checked="" type="checkbox"/> Home Phone	<input checked="" type="checkbox"/> Problem Acct
<input type="checkbox"/> Students	<input type="checkbox"/> CC on file
<input checked="" type="checkbox"/> 0-30 Days	<input type="checkbox"/> ePayment Method
<input checked="" type="checkbox"/> 31-60 Days	<input type="checkbox"/> Date Registered

Apply Apply & Save Cancel

- 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
Ager	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
Dierksen	Marlene Dierksen	jlintonjr@outlook.com	(704) 555-4446	227.88	212.24	194.12	0.00	634.24
Evans	Taylor Evans	tavevans@email.com	(704) 555-5478	207.13	250.87	33.75		491.75
Fontaine	Angela Fontaine	jlintonjr@outlook.com	(704) 555-7978	85.00	151.25	53.75	0.00	270.00
Golding	Sara Golding	sgolding@email.com	(704) 555-4748		45.00	45.00	0.00	90.00
Harris	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
Jacobs	Jane Jacobs	jjacobs@email.com	(704) 555-3421	45.00	101.25	11.25		157.50