## Aged Accounts Report (Who Owes you Money - Summary)

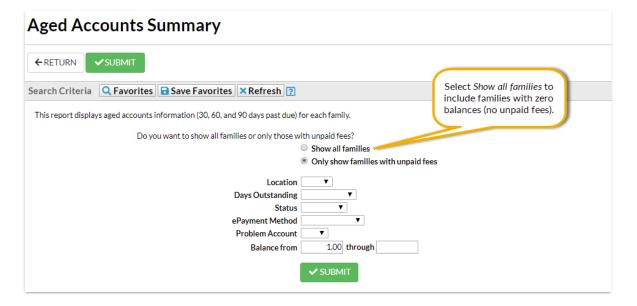
Last Modified on 07/31/2020 9:16 am EDT

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.
- reate a listing of all Problem Accounts and the details of their outstanding fees.

## Search Criteria

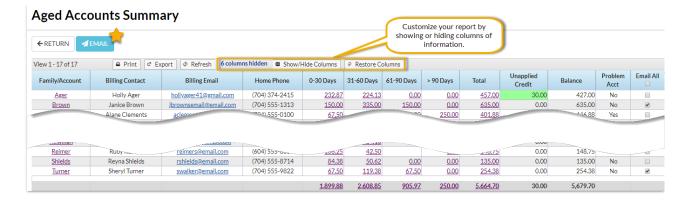




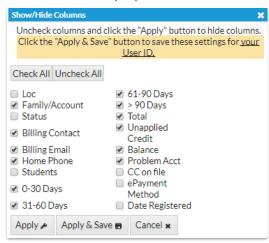
As a default this report is created with the *Balance from* defaulted to \$1. If you have many families who regularly maintain a credit balance, for example if they often make prepayments, you will want to change it to -\$5,000 so those families will be

included in the report.

## The Report Results



 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
<u>Brown</u>	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>	<u>45.00</u>	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
<u>Ingleton</u>	Shannon Ingleton	thisfamilysemail@gmail.com	(704) 349-1699		281.48	246.48	0.00	<u>527.96</u>
<u>Jacobs</u>	Jane Jacobs	jjacobs@email.com	(704) 555-3421	45.00	101.25	11.25		157.50