Aged Accounts Summary Report (Who Owes you Money)

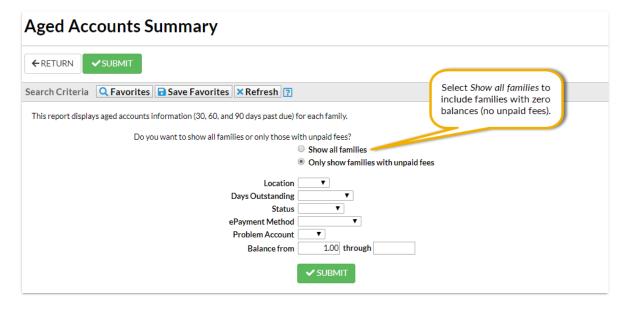
Last Modified on 11/03/2020 12:34 am EST

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) > Find Reports > Transactions/Financials (left menu), 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.
- x 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.

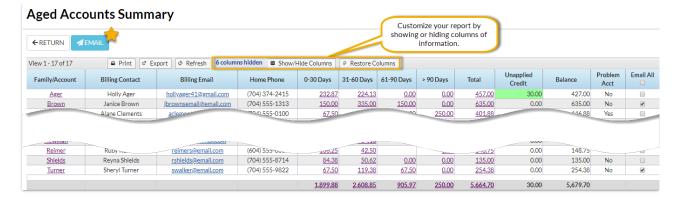
Search Criteria



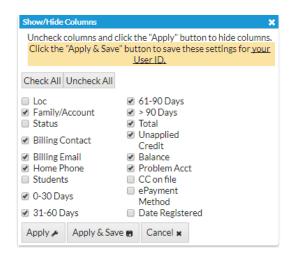
As a default this report is created with the *Balance from* defaulted to \$1. If you have many families who regularly maintain a credit balance, for example if they often make prepayments, you will want to change it to -\$5,000 so those families will be

included in the report.

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
Dierksen	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	<u>85.00</u>	<u>151.25</u>	33.75	0.00	270.00
Golding	Sara Golding	sgolding@email.com	(704) 555-4748		45.00	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>		<u>157.50</u>



(menu) > My Reports for quick and easy access!								