

# 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.
- ★ 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.

## Report Results

## Aged Accounts Summary

← RETURN  

Customize your report by showing or hiding columns of information.

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

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
<a href="#">Ager</a>	Holly Ager	<a href="mailto:hollvager41@gmail.com">hollvager41@gmail.com</a>	(704) 374-2415	232.87	224.13	0.00	0.00	457.00	30.00	427.00	No	<input type="checkbox"/>
<a href="#">Brown</a>	Janice Brown	<a href="mailto:jbrownsemail@email.com">jbrownsemail@email.com</a>	(704) 555-1313	150.00	335.00	150.00	0.00	635.00	0.00	635.00	No	<input checked="" type="checkbox"/>
<a href="#">Clements</a>	Alane Clements	<a href="mailto:aclements@email.com">aclements@email.com</a>	(704) 555-0100	67.50	84.38	0.00	250.00	401.88	0.00	401.88	Yes	<input type="checkbox"/>
<a href="#">Dierksen</a>	Marlene Dierksen	<a href="mailto:jlintonjr@outlook.com">jlintonjr@outlook.com</a>	(704) 555-4446	227.88	212.24	194.12	0.00	634.24	0.00	634.24	No	<input type="checkbox"/>
<a href="#">Evans</a>	Taylor Evans	<a href="mailto:tayevans@email.com">tayevans@email.com</a>	(704) 555-5478	207.13	250.87	33.75	0.00	491.75	0.00	491.75	No	<input type="checkbox"/>
<a href="#">Fontaine</a>	Angela Fontaine	<a href="mailto:jlintonjr@outlook.com">jlintonjr@outlook.com</a>	(704) 555-7978	85.00	151.25	33.75	0.00	270.00	0.00	270.00	No	<input type="checkbox"/>
<a href="#">Golding</a>	Sara Golding	<a href="mailto:sgolding@email.com">sgolding@email.com</a>	(704) 555-4748	17.50	34.38	0.00	0.00	51.88	0.00	51.88	No	<input type="checkbox"/>
<a href="#">Harris</a>	Anna Harris	<a href="mailto:annab@email.com">annab@email.com</a>	(704) 555-4200	17.50	34.38	0.00	0.00	51.88	0.00	51.88	No	<input type="checkbox"/>
<a href="#">Ingleton</a>	Shannon Ingleton	<a href="mailto:thisfamilysemail@gmail.com">thisfamilysemail@gmail.com</a>	(704) 349-1699	45.00	101.25	11.25	0.00	157.50	0.00	157.50	No	<input type="checkbox"/>
<a href="#">Jacobs</a>	Jane Jacobs	<a href="mailto:jjacobs@email.com">jjacobs@email.com</a>	(704) 555-3421	45.00	101.25	11.25	0.00	157.50	0.00	157.50	No	<input 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
<a href="#">Ager</a>	Holly Ager	<a href="mailto:hollvager41@gmail.com">hollvager41@gmail.com</a>	(704) 374-2415	<a href="#">232.87</a>	<a href="#">224.13</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">457.00</a>
<a href="#">Brown</a>	Janice Brown	<a href="mailto:jbrownsemail@email.com">jbrownsemail@email.com</a>	(704) 555-1313	<a href="#">150.00</a>	<a href="#">335.00</a>	<a href="#">150.00</a>	<a href="#">0.00</a>	<a href="#">635.00</a>
<a href="#">Clements</a>	Alane Clements	<a href="mailto:aclements@email.com">aclements@email.com</a>	(704) 555-0100	<a href="#">67.50</a>	<a href="#">84.38</a>	<a href="#">0.00</a>	<a href="#">250.00</a>	<a href="#">401.88</a>
<a href="#">Dierksen</a>	Marlene Dierksen	<a href="mailto:jlintonjr@outlook.com">jlintonjr@outlook.com</a>	(704) 555-4446	<a href="#">227.88</a>	<a href="#">212.24</a>	<a href="#">194.12</a>	<a href="#">0.00</a>	<a href="#">634.24</a>
<a href="#">Evans</a>	Taylor Evans	<a href="mailto:tayevans@email.com">tayevans@email.com</a>	(704) 555-5478	<a href="#">207.13</a>	<a href="#">250.87</a>	<a href="#">33.75</a>	<a href="#">0.00</a>	<a href="#">491.75</a>
<a href="#">Fontaine</a>	Angela Fontaine	<a href="mailto:jlintonjr@outlook.com">jlintonjr@outlook.com</a>	(704) 555-7978	<a href="#">85.00</a>	<a href="#">151.25</a>	<a href="#">33.75</a>	<a href="#">0.00</a>	<a href="#">270.00</a>
<a href="#">Golding</a>	Sara Golding	<a href="mailto:sgolding@email.com">sgolding@email.com</a>	(704) 555-4748	<a href="#">17.50</a>	<a href="#">34.38</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">51.88</a>
<a href="#">Harris</a>	Anna Harris	<a href="mailto:annab@email.com">annab@email.com</a>	(704) 555-4200	<a href="#">17.50</a>	<a href="#">34.38</a>	<a href="#">0.00</a>	<a href="#">0.00</a>	<a href="#">51.88</a>
<a href="#">Ingleton</a>	Shannon Ingleton	<a href="mailto:thisfamilysemail@gmail.com">thisfamilysemail@gmail.com</a>	(704) 349-1699	<a href="#">45.00</a>	<a href="#">101.25</a>	<a href="#">11.25</a>	<a href="#">0.00</a>	<a href="#">157.50</a>
<a href="#">Jacobs</a>	Jane Jacobs	<a href="mailto:jjacobs@email.com">jjacobs@email.com</a>	(704) 555-3421	<a href="#">45.00</a>	<a href="#">101.25</a>	<a href="#">11.25</a>	<a href="#">0.00</a>	<a href="#">157.50</a>



Save this as a frequently used report! Click the heart (icon)  next to a report name, the heart will change to red  and the report will be listed under the Reports

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

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