

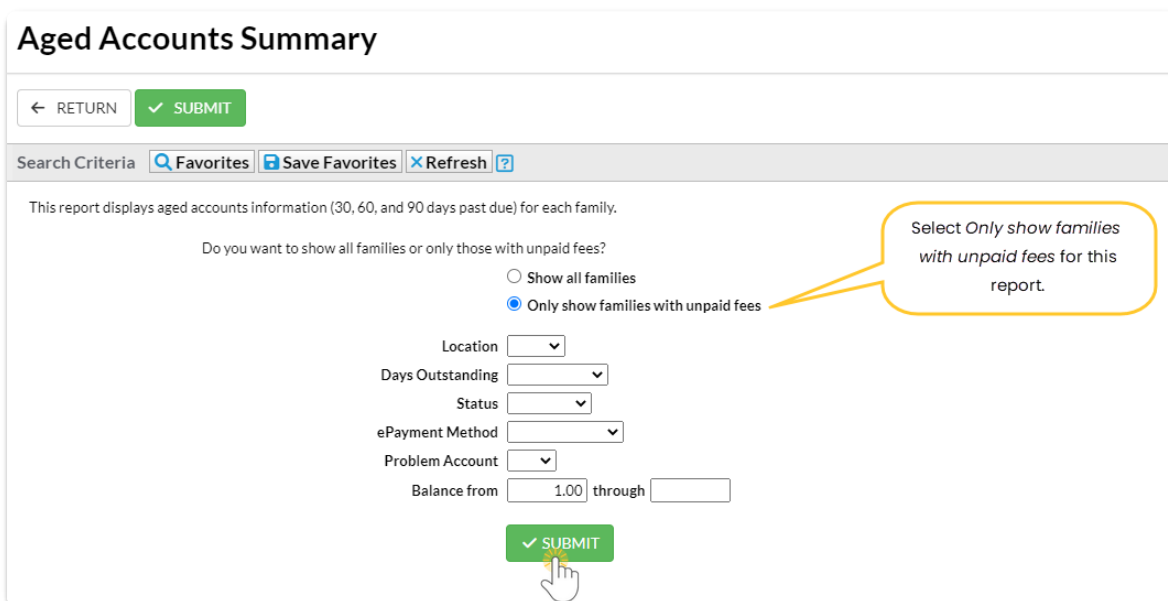
Aged Accounts Summary Report

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.

This report can be found under the **Transactions** menu > **Transaction Reports**. In addition, the report can also be accessed 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.

Select Search Criteria



The screenshot shows the 'Aged Accounts Summary' report interface. At the top, there are 'RETURN' and 'SUBMIT' buttons. Below that is a search criteria bar with 'Favorites', 'Save Favorites', and 'Refresh' options. The main content area contains the text: 'This report displays aged accounts information (30, 60, and 90 days past due) for each family.' Below this is a question: 'Do you want to show all families or only those with unpaid fees?' with two radio button options: 'Show all families' and 'Only show families with unpaid fees'. A yellow callout bubble points to the 'Only show families with unpaid fees' option with the text: 'Select Only show families with unpaid fees for this report.' Below the radio buttons are several dropdown menus: 'Location', 'Days Outstanding', 'Status', 'ePayment Method', and 'Problem Account'. At the bottom, there is a 'Balance from' field with '1.00' entered and a 'through' field. A green 'SUBMIT' button is at the bottom center, with a hand cursor icon pointing to it.



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.

Work with Report Results

The report results will list any family with a balance owing greater than \$1. You can use the last

column to select all the families and click the **Email** button to send a reminder email directly from the report.

Aged Accounts Summary

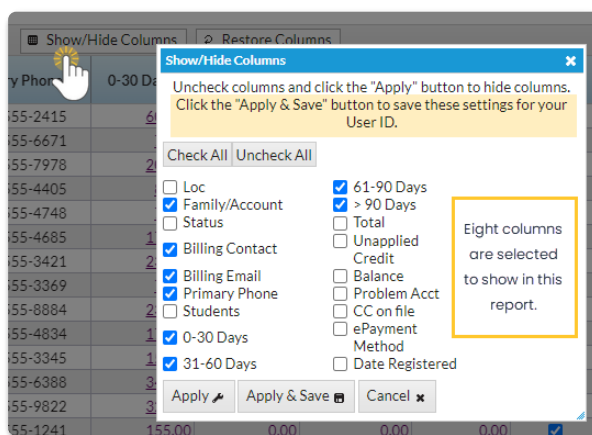
← RETURN EMAIL

View 1 - 16 of 16 Print Export Refresh 10 columns hidden Show/Hide Columns Restore Columns

Family/Account	Billing Contact	Billing Email	Primary Phone	0-30 Days	31-60 Days	61-90 Days	> 90 Days	Email All
Ager	Holly Ager	hollyager41@gmail.com	(704) 555-2415	606.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Campbell	Katherine Campbell	kcampbell@email.com	(704) 555-6671	70.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Fontaine	Angela Fontaine	jlintonjr@outlook.com	(704) 555-7978	207.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Fornos	Adele Fornos	sandibunnytest@gmail.com	(704) 555-4405	85.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Golding	Sara Golding	sgolding@email.com	(704) 555-4748	75.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Harding	Lee Harding	lharding@email.com	(704) 555-4685	170.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Jacobs	Jane Jacobs	jjacobs@email.com	(704) 555-3421	233.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Newman	Patricia Newman	pnewman@email.com	(704) 555-3369	75.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Reimer	Ruby Reimer	reimers@email.com	(704) 555-8884	235.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Rose	Barbara Rose	shewritesdocs@gmail.com	(704) 555-4834	170.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Smith	Tory Smith	tsmith@email.com	(704) 555-3345	158.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Spencer	Kara Spencer	kspencer@email.com	(704) 555-6388	340.00	340.00	318.75	85.00	<input checked="" type="checkbox"/>
Turner	Sheryl Turner	swalkers@email.com	(704) 555-9822	325.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Wallace	Livy Wallace	wallacelivy@gmail.com	(704) 555-1241	155.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>

Customize your report by showing or hiding columns of information.

- 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 fee details that make up the total.

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Fontaine	Angela Fontaine	jlintonjr@outlook.com	(704) 555-7978	207.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Fornos	Adele Fornos	sandlbunnytest@gmail.com	(704) 555-4405	85.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
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