Aged Accounts Details Report

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The **Aged Accounts Details** report provides you with a list of aged unpaid fees by family using the filters (<u>Search Criteria</u>) you select. Fees age from their transaction date and are listed by the number of days owing.

Get to this report by going to the Families menu > Family Reports.

Create a detailed listing of aged unpaid fees by family, including balances. Accountants refer to this as an Aged Accounts Receivable report.

Generate a report of aged unpaid fees that were posted during a specified time period.

Streamline collections by filtering for overdue fees and email the families directly from the report results!

Save a frequently used report for quick and easy access! Click the Heart icon next to a report name to change the heart to red and add the report to your Reports menu > My Reports.

Search Criteria

You can filter your list of families using any or all the Search Criteria, and Jackrabbit will compile a report of families who meet ALL of the criteria selected. For this example, we will filter for families with unpaid fees older than 90 days.

Always be sure a family's payments have been properly applied to fees. Fees that do not have a payment linked to them will be included in this report because they are still considered unpaid. See **Fee Linking Explained** for more information.

Report Results

Review the results and use the checkbox in the last column to select the families to email. Click the *Email* button to quickly generate an email to all or the selected students in the report.

- Use the active links in the report to go to the Family record.
- Show/Hide the columns as needed. In this example, 4 columns are hidden.
- Report results can be customized with the ability to sort columns, and modify column width.

A history of emails sent from this report is kept in the Family record, Misc tab > View Sent Emails for 365 days.