

Aging - Family Aging Report - Excel/PDF

Last Modified on 07/03/2019 8:36 am EDT

Report Description

The Family Aging report displays the balance for the parent/family with aging that shows how much is outstanding for each of the last 4 weeks and beyond. If the client has period billing, the report uses a date as of the end of the week for the date entered in the search criteria. If the client is transactional, it calculates the balance and aging as of the date entered.

Report Conditions

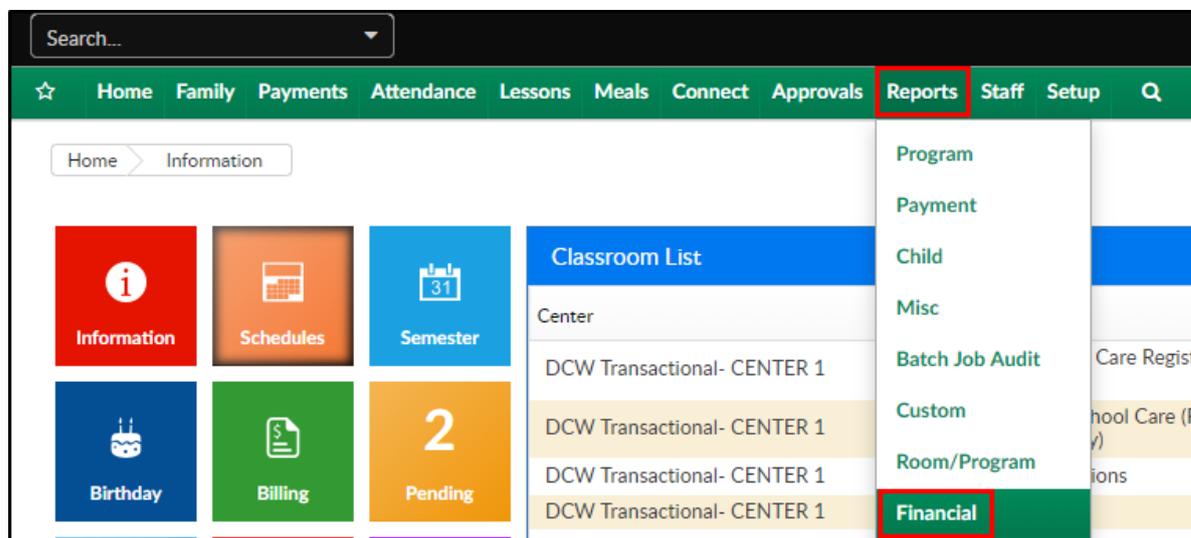
- Leaving the Center field blank will pull data for all centers
- The From Date is an As Of date. Leaving blank will pull As Of the current date

Sample Report

Click the report name to view a sample: [Family Aging.xls](#) or [Family Aging.pdf](#)

Accessing the Report

1. From the Reports menu, click Financial

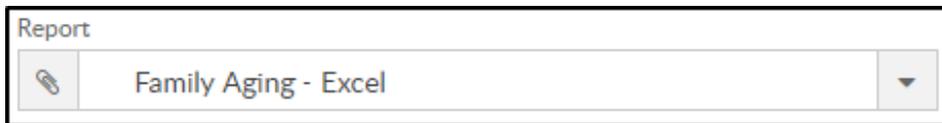


2. From the Report Category drop-down, select Aging



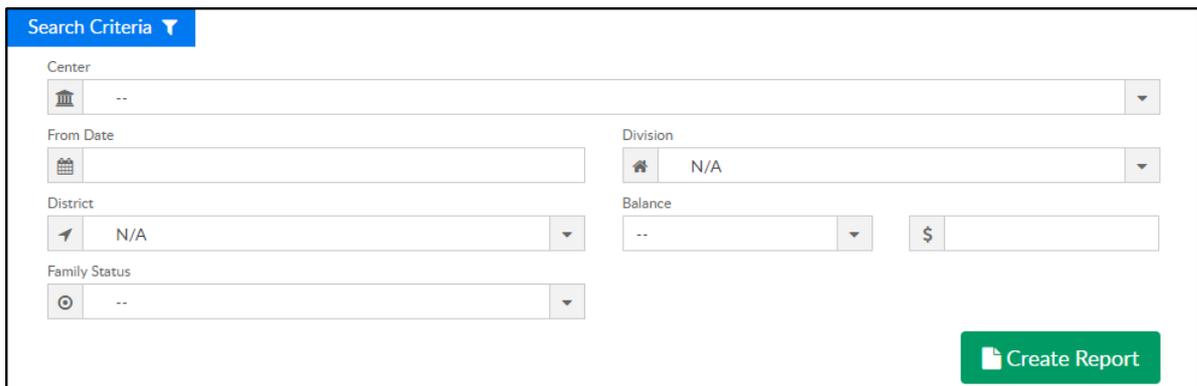
A screenshot of a web application interface showing a dropdown menu titled "Report Category". The menu is open, and the option "Aging" is selected and highlighted. There is a small icon of a group of people to the left of the text "Aging".

3. Choose Family Aging - Excel/PDF from the Report drop-down



A screenshot of a web application interface showing a dropdown menu titled "Report". The menu is open, and the option "Family Aging - Excel" is selected and highlighted. There is a small icon of a document with a link to the left of the text "Family Aging - Excel".

4. Use additional search criteria as needed



A screenshot of a web application interface showing a "Search Criteria" form. The form has a blue header with the text "Search Criteria" and a downward arrow. Below the header, there are several input fields and dropdown menus:

- Center:** A dropdown menu with a building icon and the text "--".
- From Date:** A date input field with a calendar icon.
- Division:** A dropdown menu with a house icon and the text "N/A".
- District:** A dropdown menu with a location pin icon and the text "N/A".
- Balance:** A dropdown menu with "--" and a text input field with a dollar sign "\$".
- Family Status:** A dropdown menu with a person icon and the text "--".

At the bottom right of the form, there is a green button with a document icon and the text "Create Report".

- Center - choose the center or leave blank to pull for all centers
- From Date - to view data within a specific date range, select a date
- Division - select the division, if applicable
- District - select the district, if applicable
- Balance - to search by a specific balance, choose Greater Than or Less Than, then enter the amount
- Family Status - select Active or Inactive to limit the search results to one or the other. **Please Note:** this option is not available for the PDF version

5. Click Create Report

6. The report will download in Excel or PDF format

Report Fields

When pulling data for the business level, each center will display on its own tab (or separate page when viewing PDF version)

- Center
 - As Of date
 - Family Name
 - Family Status
 - Prepaid Balance
 - 0 to 6 days
 - 7 to 13 days
 - 14 to 20 days
 - 21 to 27 days
 - Over 28 days
 - Total
 - Internal Note
 - Grand Total for each column
 - Percentage of Total for each column
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