

Aging - Family Aging Report - Excel One Tab

Last Modified on 05/30/2019 12:52 pm EDT

Report Description

The Family Aging report displays family balances for the last 28 days, broken up into each week. It also calculates the balance and aging as the date entered, instead of the end of the week.

Report Conditions

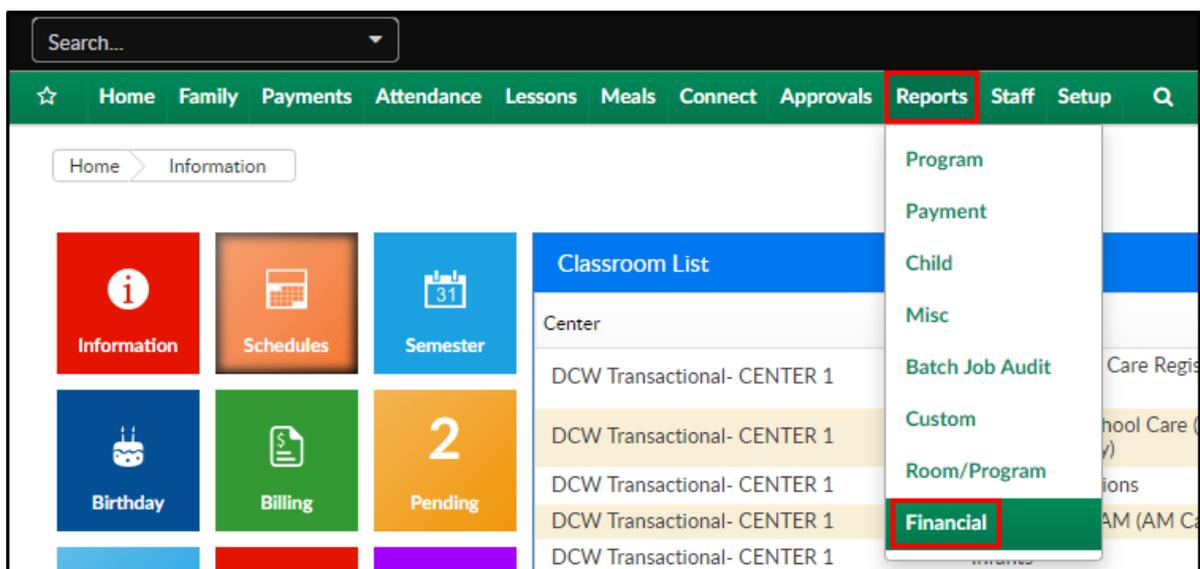
- N/A

Sample Report

Click the report name to view a sample: [Family Aging One Tab.xlsx](#) 

Accessing the Report

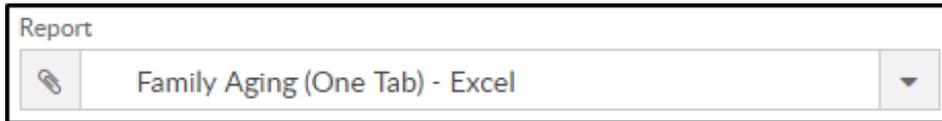
1. From the Reports menu, click Financial



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



3. Choose Family Aging (One Tab) - Excel from the Report drop-down



The screenshot shows a dropdown menu titled 'Report'. The selected item is 'Family Aging (One Tab) - Excel'. There is a small icon on the left and a downward arrow on the right of the selected item.

4. Select any necessary Search Criteria



The screenshot shows a form titled 'Search Criteria'. It has three main fields: 'Center' with a dropdown arrow, 'From Date' with a calendar icon, and 'Family Status' with a dropdown arrow. Each field contains a double dash '--'.

- Center - select the center from the drop-down
- From Date - choose a from date
- Family Status - choose Active or Inactive to filter the report

5. Click Create Report. The requested report will open in Excel format

Report Fields

- Center/Company Name
 - Family Name
 - Family Status
 - Withdrawn Date
 - Prepaid Balance
 - Current Day
 - 0 to 6 days
 - 7 to 13 days
 - 14 to 20 days
 - 21 to 27 days
 - Over 28 days
 - Total
 - Center Total with Percentage of total
 - Grand Total with Percentage of total
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