Branch Current Aging

Last Modified on 01/18/2023 5:24 pm EST

The Branch Current Aging Report will print an Accounts Receivable Aging report based on several criteria options available. This report was designed for customers operating with multiple branches, but may be generated for companies operating under a single branch. Once the desired options have been selected on the report options form, click the OK button to display the report in Print Preview mode.

 This report is a snapshot in time as of the time the report is generated. Make certain all accounts have been re-aged prior to generating this report.

Report Selections

Branch - The default is to display data for All Branches. If the data for only certain Branches is desired, you may highlight the first Branch, then depress the CTRL key and highlight additional Branches within the list.

- Hide Inactive Branches - If data is not to be listed for inactive Branches, select this option.

Options

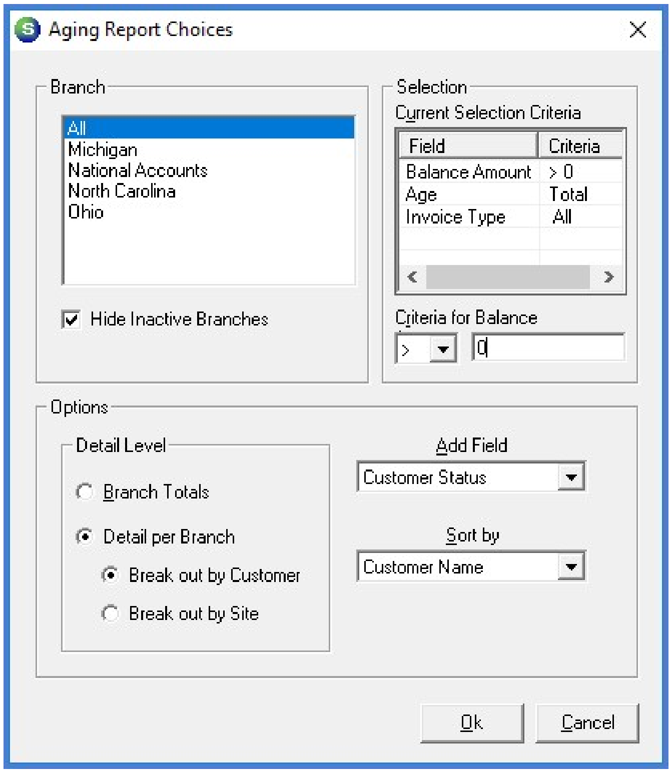
- Branch Totals - Selecting this option will print the report in Summary mode.
- Detail per Branch - Selecting this option will print the report in Detail mode. If this option is selected, the User must select one of the two options: Break out by Customer or Break out by Site.
  - Break out by Customer
  - Break out by Site

Selections - There are three selections available; one, two or all three selections may be used. As each selection is highlighted, criteria information may be changed or you may accept the default.

- Balance Amount - This selection allows the User to select balances where the amount is greater than, greater than or equal to or equal to the amount specified in the Balance field. The report default is all balances greater than zero.
- Age - This selection allows the User to select all customers with balances or customers with balances in a particular aging bucket. If the criteria selection of Total is selected, all customers with a total balance that meets the criteria of the Balance Amount option(above) will be included in the report results. The report default is the Total criteria selection.
- Invoice Type - you may select all invoice types or a single invoice type from the drop-down list in the criteria field. The report default is All invoice types.

Add Field - The User has the option of adding one additional field to the report. The report default is Customer Status. The other Add Field options available are Collection Status, Bill Phone, Collection Queue, and Salesperson. This option is only used if the Detail per Branch option was selected.

Sort By - The report default is to sort by Customer Name. The other sorting option available is Customer Number. This option is only used if the Detail per Branch option was selected.


Aging Report Choices
Branch
All
Michigan
National Accounts
North Carolina
Ohio
Hide Inactive Branches
Selection
Current Selection Criteria
Field
Criteria
Balance Amount
> 0
Age
Total
Invoice Type
All
Criteria for Balance
>
0
Options
Detail Level
Branch Totals
Detail per Branch
Break out by Customer
Break out by Site
Add Field
Customer Status
Sort by
Customer Name
Ok
Cancel