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How to view accounts receivable (A/R) aging report

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The Accounts Receivable (A/R) Aging Report provides a summary of outstanding receivables by invoice type and aging period. This report helps administrators monitor unpaid and partially paid invoices, identify overdue balances, and review outstanding receivables across memberships, events, products, donations, and standalone invoices.

The report groups balances into aging buckets based on how long invoices have been overdue, making it easier to track receivables and follow up on outstanding payments.

Note

The A/R Aging Report displays unpaid and partially paid invoice balances. Fully paid invoices are not included in the report.

To Get Started

1. From the main menu on the left, click Settings -- E-Commerce and Financial -- A/R Aging Report
2. You will be redirected to the A/R Aging Report page where you can filter and review outstanding invoices.

Using Report Filters

The filter section at the top of the report allows you to narrow down the results.

- **Date:** Choose a predefined date preset (e.g., Today, This Month) or select a custom range.
- **Date Range:** Specify exact start and end dates to filter by the original invoice date.
- **Bill To:** Search for a specific member or organization.
- **Status:** Filter by payment status. Options include: All, Unpaid, or Partially Paid.
- **Type:** Filter by specific invoice categories: Dues, Products, Events, Donations, or Standalone.
- **Price Plan:** Filters based on your configured Membership Types.
- **Product Options:** Filter by standalone product options.
- **Events:** Filters the report to show invoices tied only to selected events.

After selecting the filters, click Update Results to refresh the report.

Viewing Report Results

The report displays outstanding balances grouped into aging categories.

- **Current:** Invoices that are not yet past due.
- **1 - 30 Days Overdue:** Invoices overdue between 1 and 30 days.
- **31 - 60 Days Overdue:** Invoices overdue between 31 and 60 days.
- **61 - 90 Days Overdue:** Invoices overdue between 61 and 90 days.
- **91+ Days Overdue:** Invoices overdue for more than 91 days.

Searching and Managing Results

Once the data is generated, you can easily organize and manage the results directly within the report grid:

- **Quick Search:** Use the Search field above the grid to instantly find specific invoices, invoice numbers, or member names in the current results.
- **Sort Columns:** Click on any column header to sort the data in ascending or descending order.
- **View Invoice Details:** Click the + (plus) icon next to any invoice row to expand it and view line-item details.