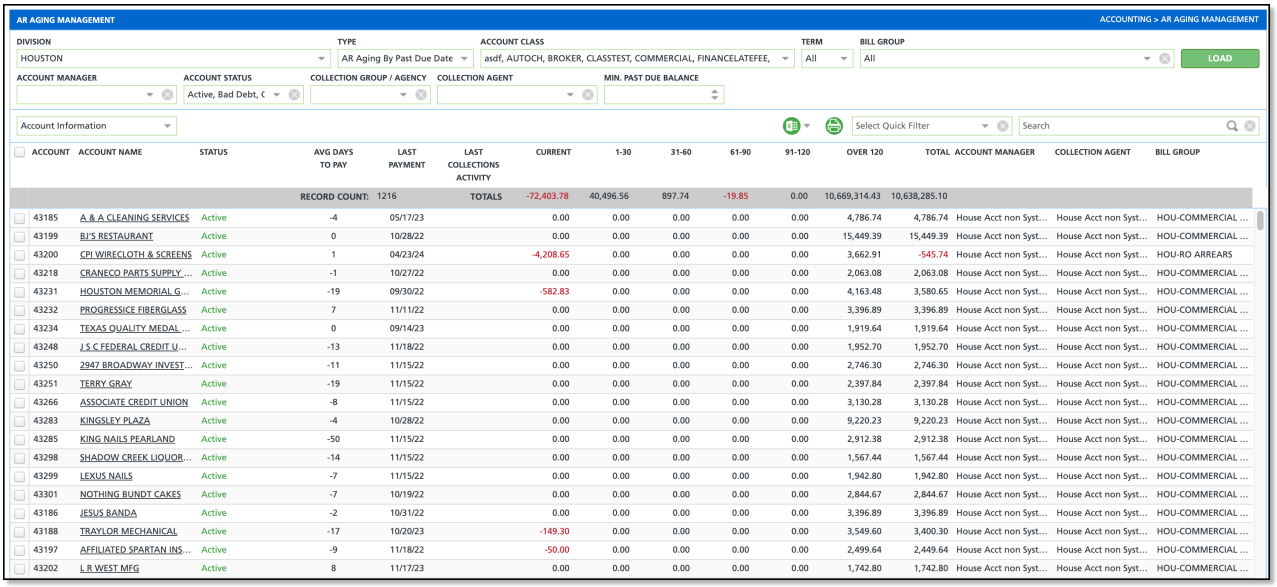
AR Aging Management - Accounting

Last Modified on 08/14/2026 1:49 pm PDT

Pathway: *Accounting > AR Aging Management*

The *AR Aging Management* screen categorizes a company's accounts receivable according to the length of time an invoice has been outstanding. In addition, users can take action on targeted past-due accounts by sending past due notification emails, generating past due notification letters, changing the status of an account, or recording notes and tasks to follow up on at a later time.



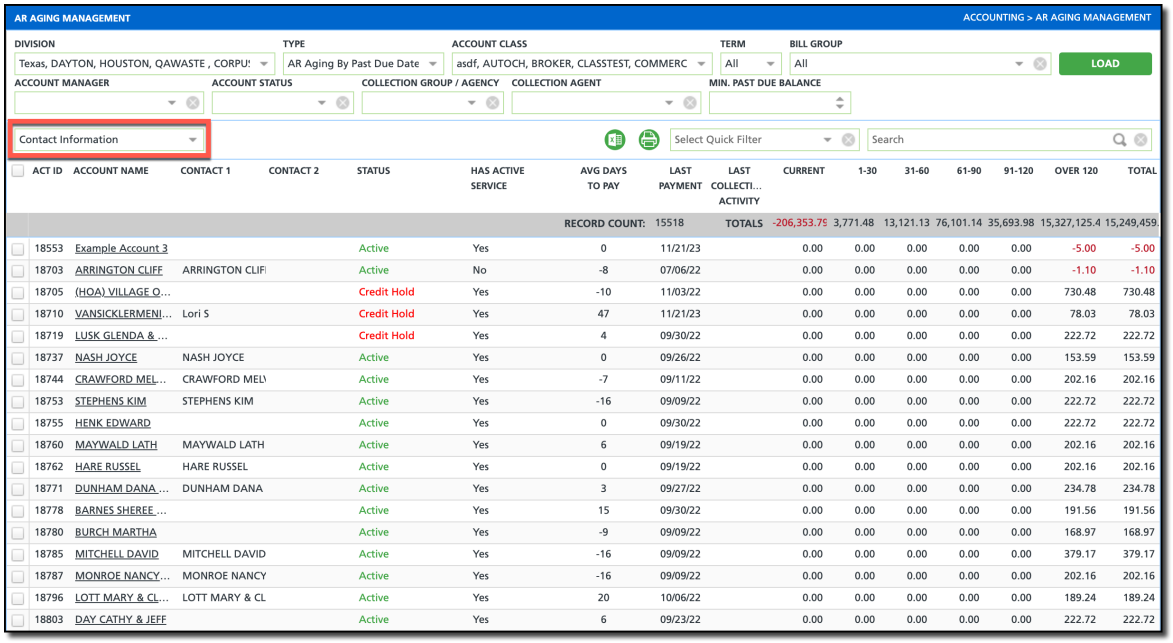
Permissions

The following Permission is required to view and interact with the AR Aging Management tool.

Permission ID	Permission Name
263	View AR/AP Management Screen

Screen Views

The AR Aging Management screen is available in two views: *Account Information* and *Contact Information*. Switching between the views will change what is displayed on the screen.



Field Descriptions

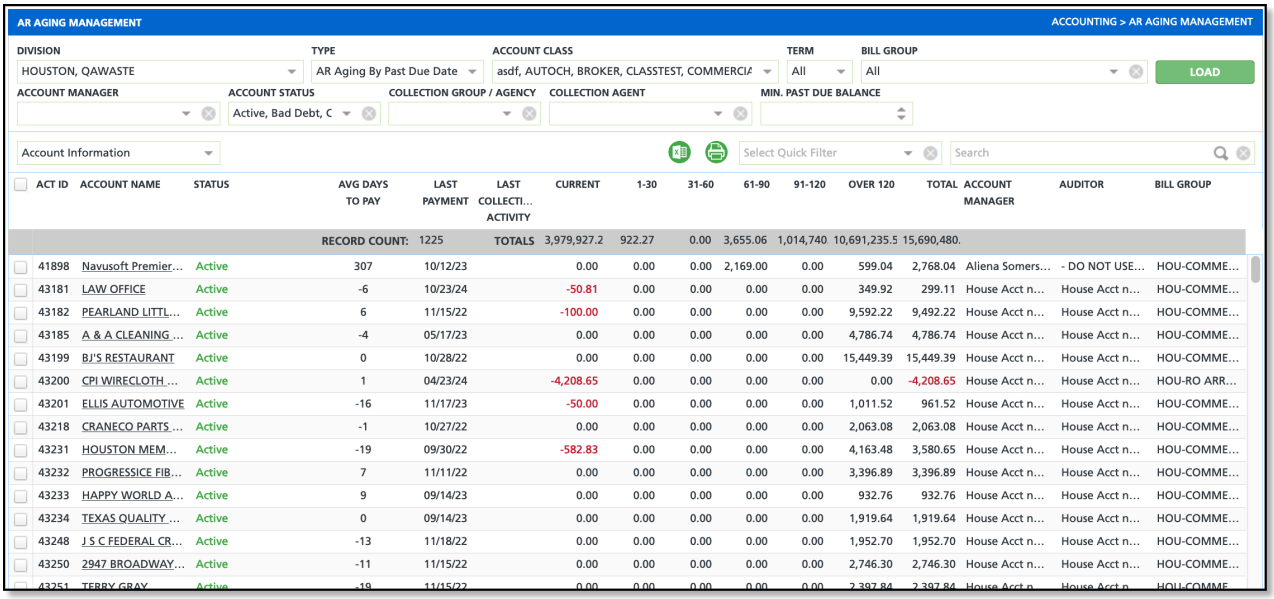
The following fields and filters are displayed when viewing the AR Aging Management screen:

Field	Description
Filter Fields	
Division *Required*	Filters to only include accounts of the selected division. Select all to include all divisions.
Type *Required*	Filters by: AR Age By Invoice Date, AR Aging By Past Due Date and AP Aging.
Account Class	Filters by the Account Class - Commercial, Residential, Government, etc.
Term	Filters by the following terms for when invoice payments are due: *All, Due Upon Receipt, Net 15, Net 20 and Net 30*
Bill Group	Filters on the Bill Group associated with each account.
Account Manager	Filters to only include accounts assigned to the Account Manager selected.
Account Status	Filters to only include the selected Status'. This filter allows for multiple selections.
Collection Agency/Group	Filters to only include accounts assigned to the selected Collection Agency/Group.
Collection Agent	Filter to only include accounts reviewed by the selected Collection Agent.

Field	Description
Min. Past Due Balance	Enter a minimum past due balance amount to only load the accounts that have a balance greater than or equal to the entered value. Does not support or include negative values.
Contact/Account Information	Toggle between the Account Information and Contact Information screen views. This will change the fields that are displayed on the screen.
Aging Buckets	
Current	Displays the total amount being billed for on current invoices. A negative value indicates an over-payment was made on the most recent (current) invoice.
1-30 Days **31-60 Days** **61-90 Days** **91-120 Days** **120+ Days**	Totals the amount for each category of past-due invoice periods. **1-30** Days: Invoices that are 1-30 days past their due date. **31-60** Days: Invoices that are 31 to 60 days past their due date. **61-90** Days: Invoices that are 61 to 90 days past their due date. **91-120** Days: Invoices that are 91-120 days past their due date. **120+ Days**: Invoices that are more than 120 days past their due date. Apply a *Quick Filter* to review and take action on a specific category of past due accounts.
Total	Calculated as the Sum of all current and past due invoice totals.
Other Fields	
Select Quick Filter	Apply a Quick Filter to filter what has already been returned to a specific set of accounts. For example, run a quick filter to only see a list of accounts that are 120+ days past due. Load must be generated before a Quick Filter can be applied.
Search	Provides a keyword search that may include numeric values and special characters. This tool searches across all rows and columns and returns matching words or values.
Export to Excel (icon)	Exports everything currently being displayed on the AR/AP Aging Management screen into an Excel file. This does not export only the accounts where the selection box was checked.

Field	Description
Print Past Due Notifications (icon)	Generates a past-due notification letter for the selected accounts. Includes an option to exclude invoice by email customers. If a note is entered into the Notes field when generating the letter, the note will display on the calendar day the letter was generated in the customer's account. Notes entered here are for internal purposes and may be used as a way to record when the letter was prepared.

View Aging of Accounts



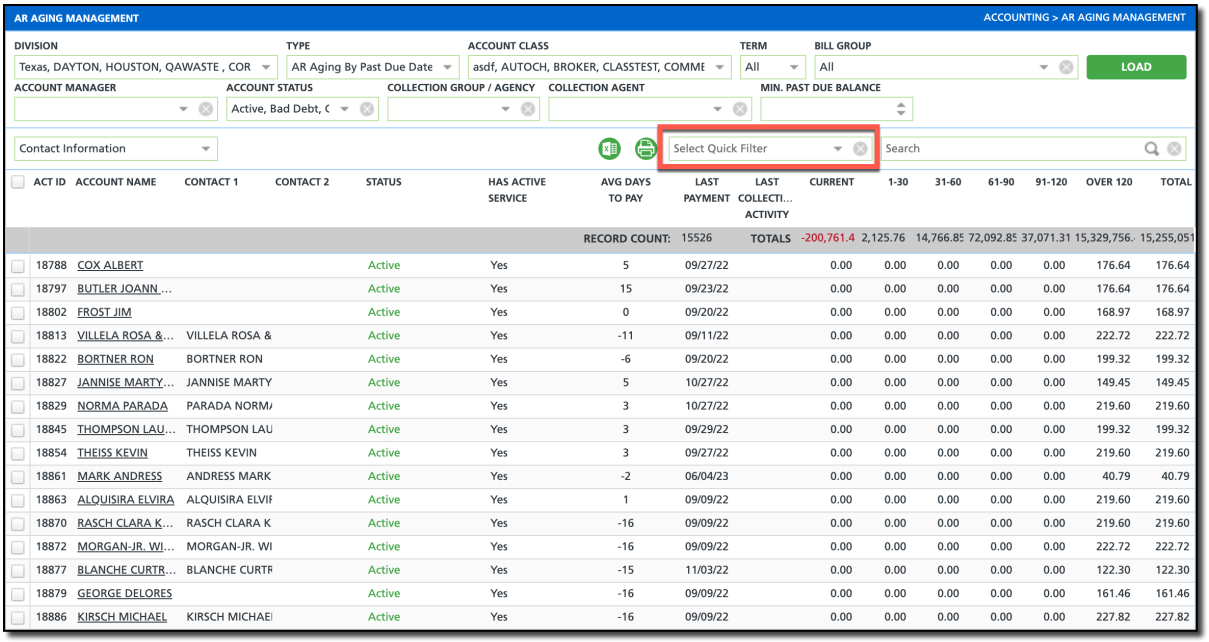
Load Accounts

1. Select a **Division**. Only one division can be selected at a time.
2. Select the **Type** of AR aging you would like to view.
    1. Optional - make a selection from any of the following **filters** to further narrow down the returned results.
    2. Account Class
    3. Term
    4. Bill Group
    5. Account Manager
    6. Account Status
    7. Auditor
    8. MIN. Past Due Balance
3. Select **Load**.

Apply a Quick Filter

Quick Filters provide an additional way to further drill down and target specific accounts to review and take

action on. For example, you may apply a quick filter to only show accounts 1-30 days past due so a past-due email reminder can be sent. Quick Filters are only available after accounts have been loaded.

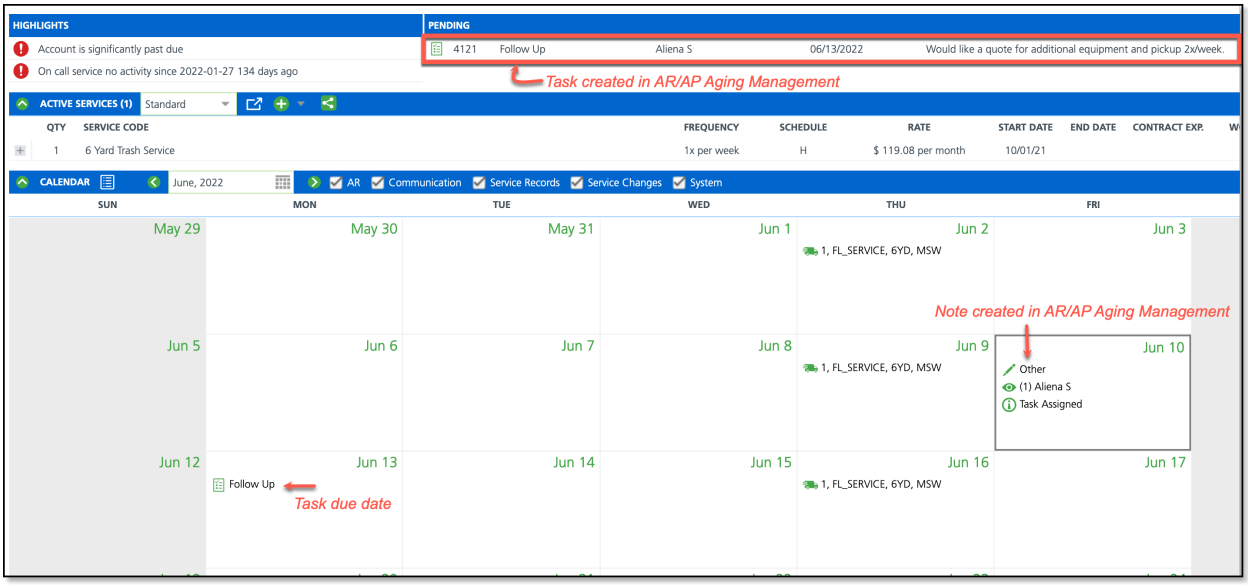


1. Load accounts using the steps outlined in the Load Accounts section above.

2. Select from the drop-down list of Quick Filter options, and the screen will automatically update to reflect the chosen filter.

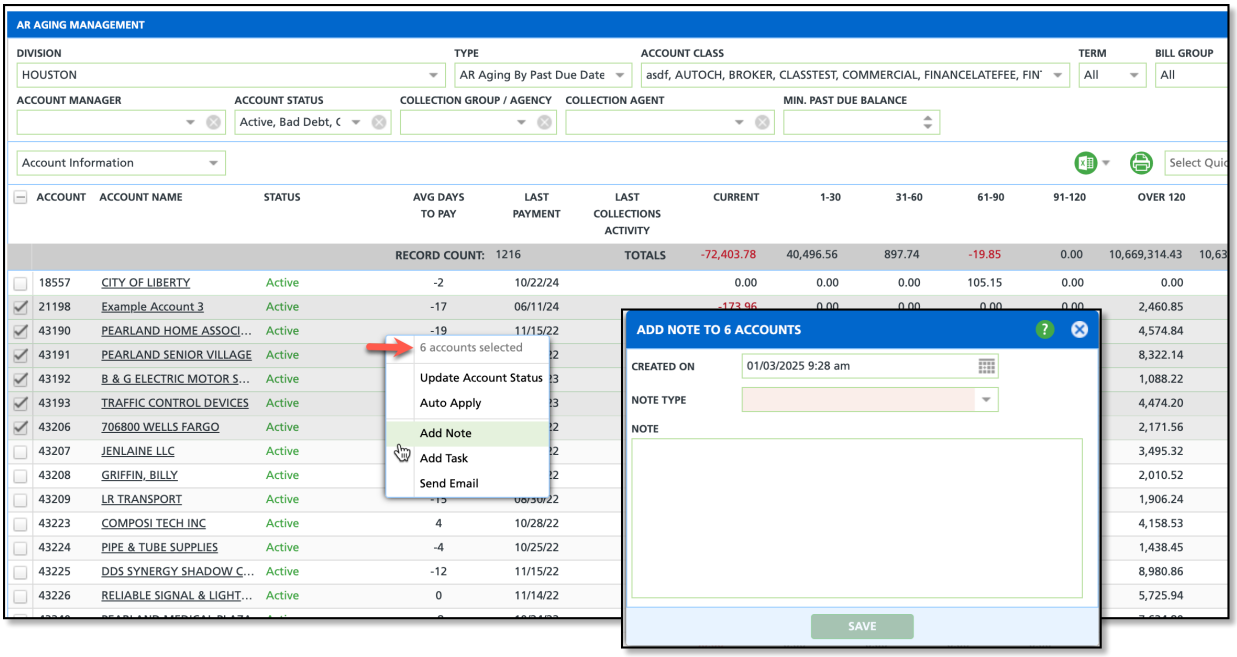
Notes and Tasks

Create a note or a task to follow up on an account at a later time. Notes and tasks can be added to individual accounts, or en masse. When added, notes and tasks display on the customer's account.



Add a Note

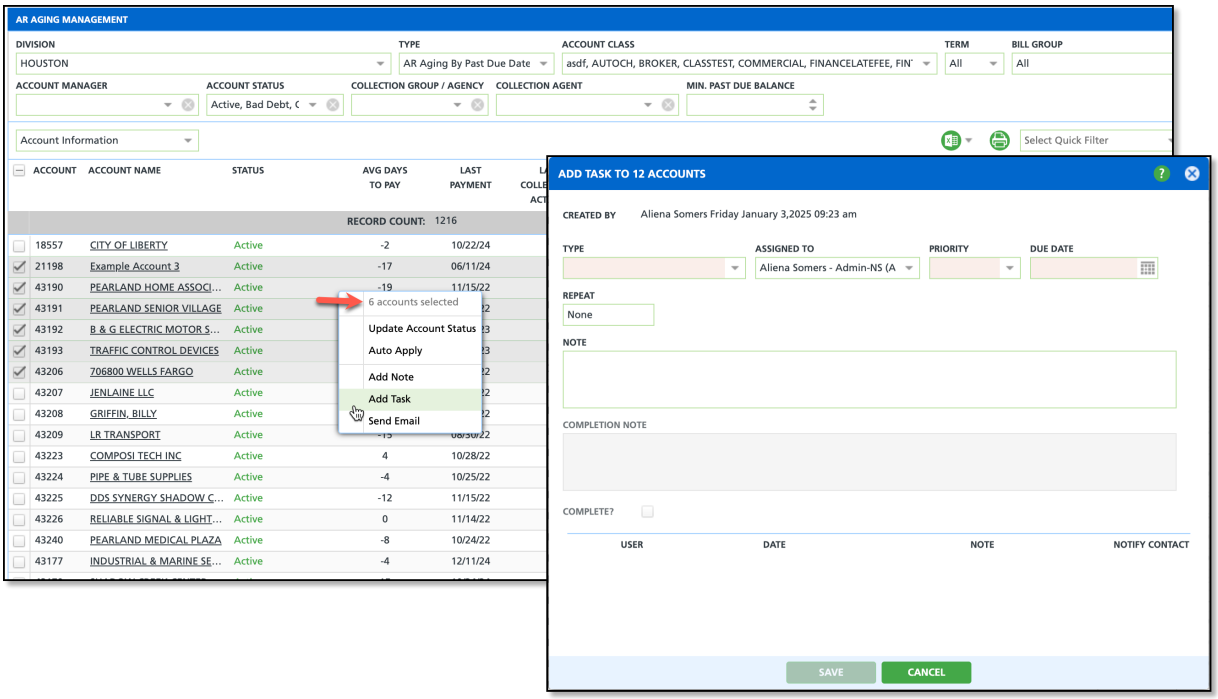
Notes provide an option to record information or interactions with a customer that can be referred back to.



1. Select the box for the accounts you would like to add a Note to. If all accounts apply, select the 'Select All' box from the header row.
2. Right-click within the row of any of the selected accounts.
3. Select **Add Note**. The note will display on the Customer's account for the day it was created on.
4. Click **Save.**

Add a Task

Tasks can be added to a customer's account for any reason where followup, further review, or something related to the successful operation of the account is needed. More information about tasks can be found here: Add Task

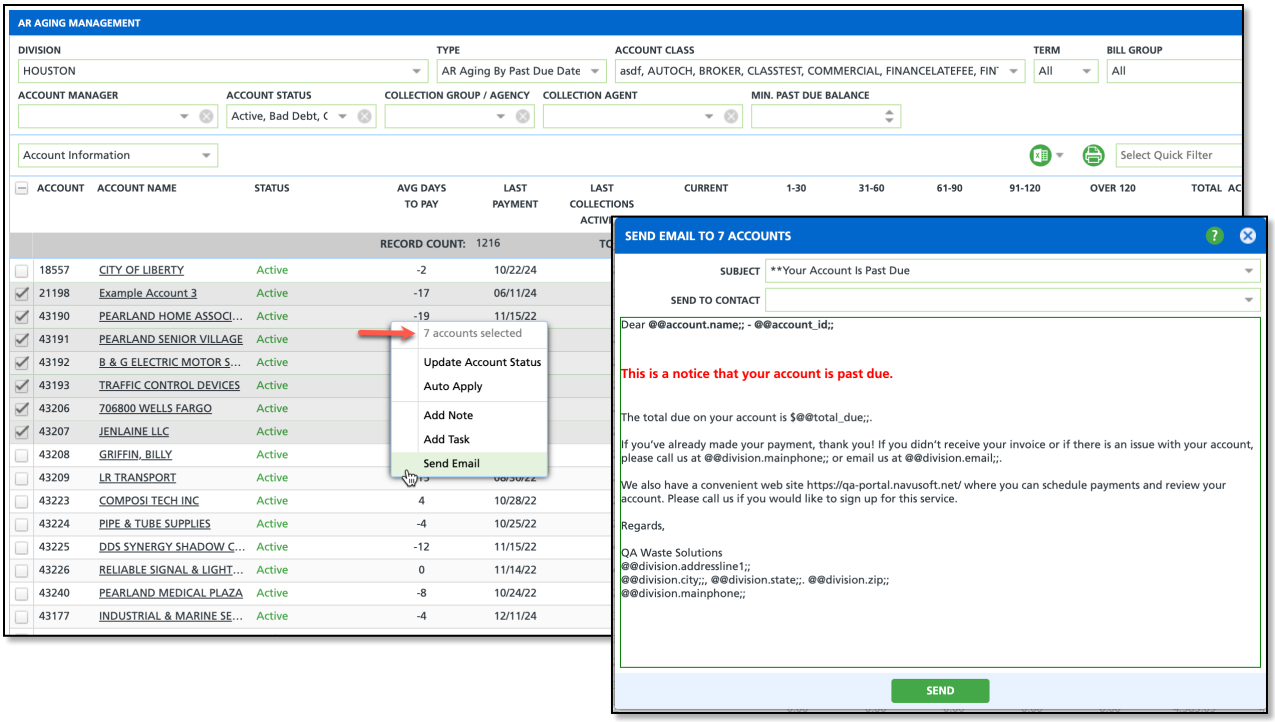


1. Select the box for the accounts you would like to add a Task to. If all accounts apply, select the 'Select All' box from the header row.
2. Right-click within the row of any of the selected accounts.

3. Select **Add Task**. The task will display in the following locations:
    a. Under the Pending section of the customer's account
    b. On the calendar day the Task is due (in the customer's account)
    c. As a Task in the user account of the user it was assigned
4. Click **Save.**

Send an Email

Send past-due invoice emails to accounts, excluding those who opted out. Increase your efficiency and standardize your email content by using pre-set templates created in *Setup* > *System* > *Notification Template* .
**Users will have the option to edit the subject line and content after a default subject is select and the the email body is populated.

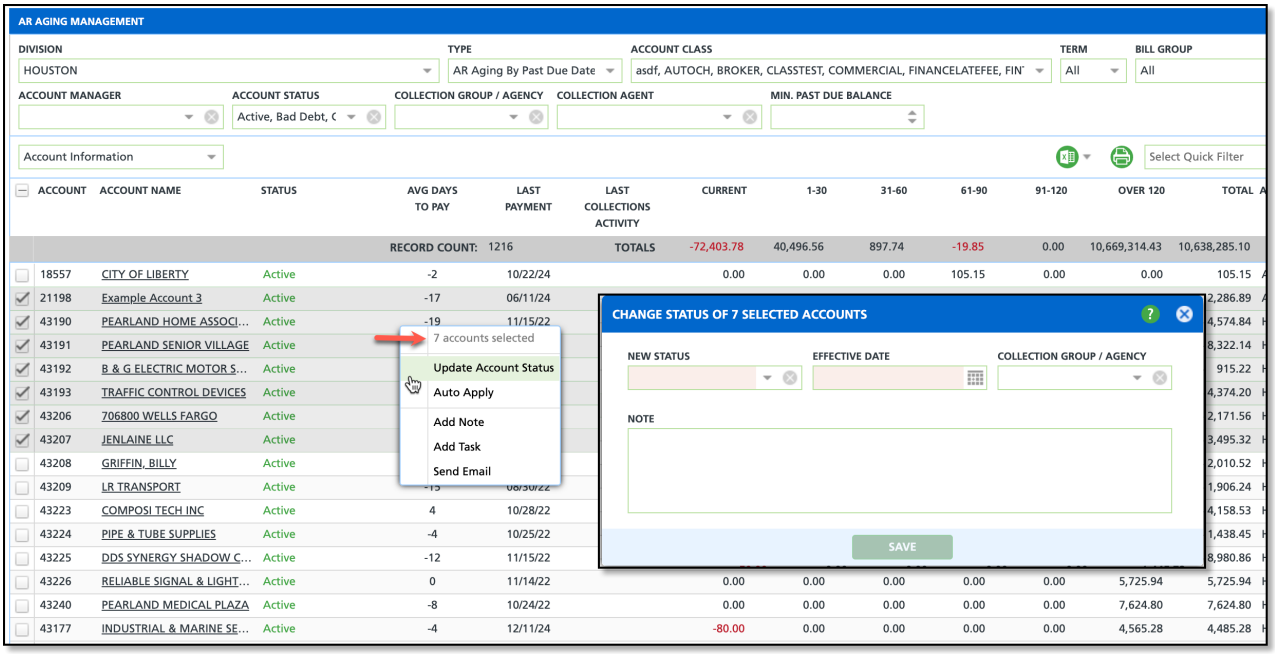


Send Email

1. Select the one or more check boxes from for the accounts list that you would like to send an email to. If all accounts apply, select the 'Select All' box from the header row.
2. Right-click within the row of any of the selected accounts.
3. Select **Send Email**; the past due email will be sent to each of the selected accounts.
4. Select from one of the template options in the **Subject** drop down.
5. Review the email template that displays and make any changes (if necessary).
6. Select **Send**.

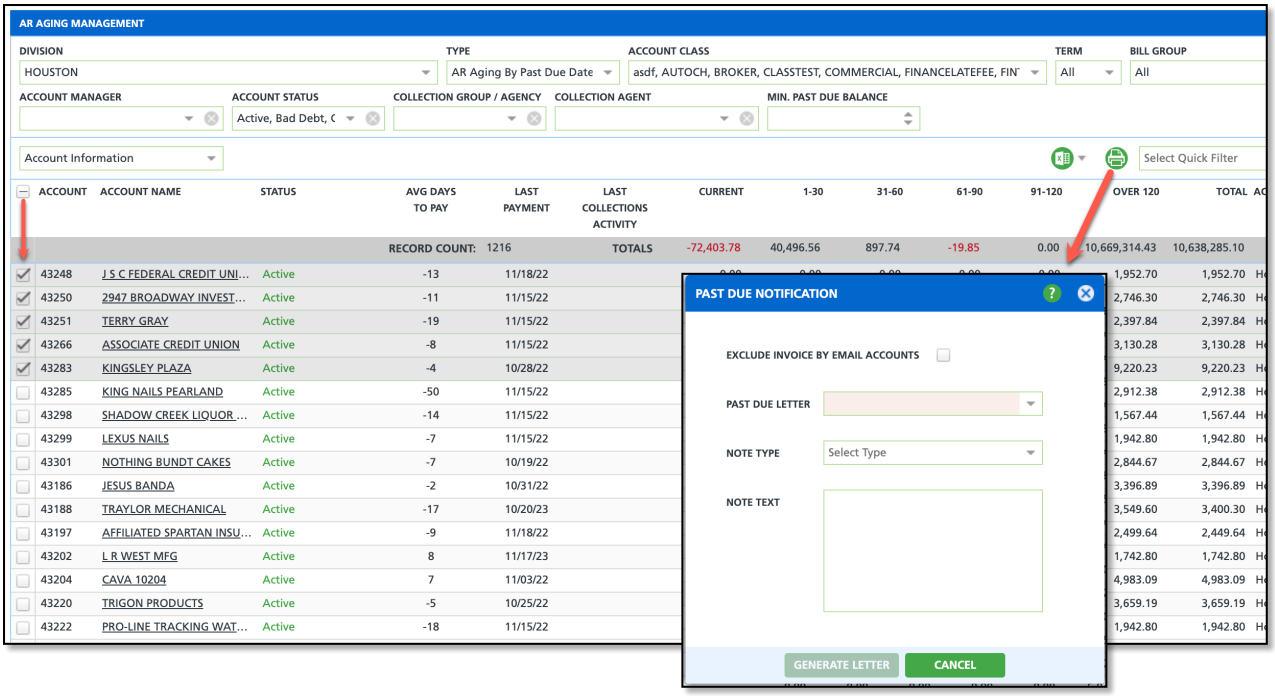
Update Account Status

To change the status of an account or multiple accounts, right-click on the row of the desired account and select "Update Account Status." Choose the new status and specify an effective date. Upon saving, the status of all selected accounts will be updated on the effective date.



Generate Past Due Notification Letters

Send Past Due Notification letters to one or multiple accounts at a time.



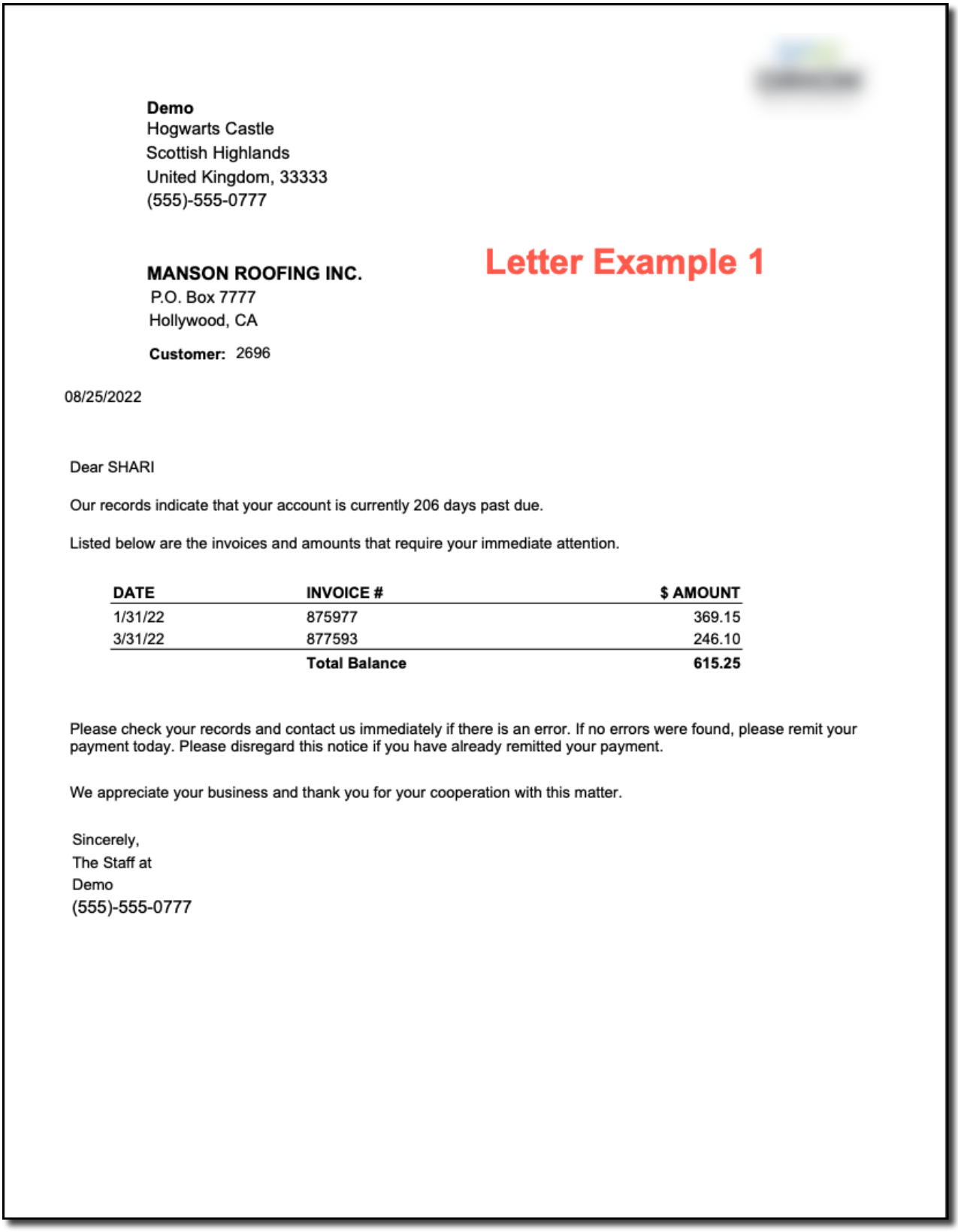
Print Notifications

1. Select each account a letter should be generated for and click the **Print** icon. This will open the 'Past Due Notification' popup.
2. Select the **'Exclude Invoice By Email Accounts'** check box if you would like to exclude printing a notification letter for accounts that only receive email invoices.
3. Select from the **Past Due Letter** options. See the letter examples listed below to determine which one best suits your needs.
4. Select the **Note Type**.
5. Enter a **Note Text**. Note texts are for internal purposes only and may help record things such as the date

the letter was prepared for mailing.

Letter Examples

Letter 1



Demo
Hogwarts Castle
Scottish Highlands
United Kingdom, 33333
(555)-555-0777

MANSON ROOFING INC.
P.O. Box 7777
Hollywood, CA

Customer: 2696

Letter Example 1

08/25/2022

Dear SHARI

Our records indicate that your account is currently 206 days past due.

Listed below are the invoices and amounts that require your immediate attention.

DATE	INVOICE #	$ AMOUNT
1/31/22	875977	369.15
3/31/22	877593	246.10
	Total Balance	**615.25**

Please check your records and contact us immediately if there is an error. If no errors were found, please remit your payment today. Please disregard this notice if you have already remitted your payment.

We appreciate your business and thank you for your cooperation with this matter.

Sincerely,
The Staff at
Demo
(555)-555-0777

Letter 2

Demo
Hogwarts Castle
Scottish Highlands
United Kingdom, 33333
(555)-555-0777

Letter Example 2

MANSON ROOFING INC.
P.O. Box 7777
Hollywood, CA

Customer: 2696

08/25/2022

RE: SHARI, 2696, $615.25

Dear SHARI

Our records indicate that your account is currently 206 days past due. Please remit your payment within 5 business days of this notice to avoid any interruption in service. If payment in full cannot be made at this time, please contact our office at (555)-555-0777 make payment arrangements. Failure to do so will results in suspension of your services.

DATE	INVOICE #	$ AMOUNT
1/31/22	875977	369.15
3/31/22	877593	246.10
	Total Balance	**615.25**

Please disregard this notice if you have already remitted your payment.

We appreciate your business and thank you for your cooperation with this matter.

Sincerely,
The Staff at
Demo
(555)-555-0777

Letter 3

Demo
Hogwarts Castle
Scottish Highlands
United Kingdom, 33333
(555)-555-0777

Letter Example 3

LEITER LANDSCAPING
P.O. Box 7777
Hollywood, CA

Customer: 2705

08/26/2022

RE: JEANNETTE 2705, $658.25

Dear JEANNETTE

Our records indicate that your account is seriously past due and your services has been suspended. In oder to reinstate services and to avoid having your account placed into collections, your payment must be made immediately. If payment in full cannot be made at this time, please contact our office to discuss available payment arrangements.

Listed below are the invoices and amounts that require your immediate attention.

DATE	INVOICE #	$ AMOUNT
10/31/21	868707	112.17
1/31/22	876143	336.51
3/31/22	877872	209.57
	Total Balance	**658.25**

Please disregard this notice if you have already remitted your payment.

We appreciate your business and thank you for your cooperation with this matter.

Sincerely,
The Staff at
Demo
(555)-555-0777

Letter 4

Demo
Hogwarts Castle
Scottish Highlands
United Kingdom, 33333
(555)-555-0777

Letter Example 4

MANSON ROOFING INC.

Customer: 2696

08/25/2022

RE: SHARI, 2696, $615.25

Dear SHARI

We have made several attempts to collect payment on your account for the following invoices. To avoid any legal fees that may result from our attempts at collecting this debt, please contact our office immediately at (555)-555-0777 to make payment arrangements.

DATE	INVOICE #	$ AMOUNT
1/31/22	875977	369.15
3/31/22	877593	246.10
	Total Balance	**615.25**

Please disregard this notice if you have already remitted your payment.

We appreciate your business and thank you for your cooperation with this matter.

Sincerely,
The Staff at
Demo
(555)-555-0777

Letter 5

Demo
Hogwarts Castle
Scottish Highlands
United Kingdom, 33333
(555)-555-0777

MANSON ROOFING INC.
P.O. Box 7777
Hollywood, CA

Customer: 2696

Letter Example 5

08/24/2022

Dear SHARI

We appreciate you choosing Demo as your premium Waste and Recycling service provider.

This is a reminder that your account is PAST DUE!

Listed below are the invoices and amounts that require your immediate attention.

DATE	INVOICE #	$ AMOUNT
10/31/21	868556	245.30
1/31/22	875977	369.15
3/31/22	877593	246.10
	Total Balance	**860.55**

If you have already made your payments, thank you!

If you did not receive your invoices, please call us at or email us at support@navusoft.com

We also have a convenient website where you can schedule payments and review your account. Please call us if you would like to sign up for this service. (555)-555-0777

We appreciate your business and thank you for your cooperation with this matter.

Best Regards,

Account Receivable Department

Letter 6

Demo
Hogwarts Castle
Scottish Highlands
United Kingdom, 33333
(555)-555-0777

LEITER LANDSCAPING
777 Hollywood Blvd
Hollywood CA 90028

Customer: 2705

Letter Example 6

08/26/2022

Dear JEANNETTE

Your account is PAST DUE, and your SERVICE WILL BE SUSPENDED prior to your next schedule pick-up day

Our records indicate that your account is currently 299 days past due. Please remit your payment within **5 business days** of this notice to avoid any interruption in service.

If payment in full cannot be made at this time, please contact our office immediately to discuss available payment arrangements.
Failure to do so will results in suspension of your services.

Listed below are the invoices and amounts that require your immediate attention.

DATE	INVOICE #	$ AMOUNT
10/31/21	868707	112.17
1/31/22	876143	336.51
3/31/22	877872	209.57
	Total Balance	**658.25**

We also have a convenient website where you can schedule payments and review your account. Please call us if you would like to sign you for this service.

We appreciate your business and thank you for your cooperation with this matter.

Best Regards,

Account Receivable Department
(555)-555-0777
support@navusoft.com

Letter 7

Demo
Hogwarts Castle
Scottish Highlands
United Kingdom, 33333
(555)-555-0777

LEITER LANDSCAPING
777 Hollywood Blvd
Hollywood CA 90028

Customer: 2705

Letter Example 7

08/26/2022

Dear JEANNETTE

IMMEDIATE PAYMENT ACTION REQUIRED!

Our records indicate that your account is seriously past due. As a result, your services have been suspended.
To avoid further action against this account, please contact us immediately to make payment arragements.

Listed below are the invoices and amounts that require your immediate attention.

DATE	INVOICE #	$ AMOUNT
10/31/21	868707	112.17
1/31/22	876143	336.51
3/31/22	877872	209.57
	Total Balance	**658.25**

We appreciate your business and thank you for your prompt attention with this matter.

Best Regards,

Account Receivable Department
(555)-555-0777
support@navusoft.com

Past Due Letter 1

Demo
124 Conch St
Bikini Bottom, CA 90210

Past Due Letter Example 1

SquarePants Waste
777 Hollywood Ave
Hollywood CA, 90028

For Invoice Inquires contact us by email at:.
support@navusoft.com or Phone (555)-555-0777

Dear SquarePants Waste

We appreciate you choosing Demo as your premium service provider.

Our records show that your account with us may be past due. If you have already made your payments, thank you! If you did not receive your current invoice or if there is an issue with your account, please call us at (555)-555-0777 or email us at support@navusoft.com

We also have a convenient website https://orionportal-sandbox.navusoft.net/ where you can schedule payments and review your account. Please call us if you would like to sign up for this service.

Below is a snapshot of you current account balance for review.

Current	1-30 Days	31-60 Days	61-90 Days	Over 90 Days	Total Due
0.00	0.00	0.00	0.00	658.25	658.25

Best Regards,
Sarasota

Past Due Letter 2

Demo
124 Conch St
Bikini Bottom, CA 90210

Past Due Letter Example 2

SquarePants Waste
777 Hollywood Ave
Hollywood CA, 90028

For Invoice Inquires contact us by email at:.
support@navusoft.com or Phone (555)-555-0777

Dear SquarePants Waste

Your account is PAST DUE, and your SERVICE WILL BE SUSPENDED prior to your next schedule pick-up day

Please contact us immediately at (555)-555-0777 to prevent your service from being interrupted. If you've already made your payment, thank you!

We also have a convenient website https://orionportal-sandbox.navusoft.net/ where you can schedule payments and review your account. Please call us if you would like to sign up for this service.

Below is a snapshot of you current account balance for review.

Current	1-30 Days	31-60 Days	61-90 Days	Over 90 Days	Total Due
0.00	0.00	0.00	0.00	658.25	658.25

Best Regards,

Past Due Letter 3

Demo
124 Conch St
Bikini Bottom, CA 90210

Past Due Letter Example 3

SquarePants Waste
777 Hollywood Ave
Hollywood CA, 90028

For Invoice Inquires contact us by email at:.
support@navusoft.com or Phone (555)-555-0777

Dear SquarePants Waste

We appreciate you choosing Demo as you premium trash and recycling service provider.

This is a reminder that your account is past due!

If you have already made your payments, thank you! If you didn't receive you invoice or if there is an issue with your account, please call us at (555)-555-0777 or email us at support@navusoft.com

We also have a convenient website https://orionportal-sandbox.navusoft.net/ where you can schedule payments and review your account. Please call us if you would like to sign up for this service.

Below is a snapshot of you current account balance for review.

Current	1-30 Days	31-60 Days	61-90 Days	Over 90 Days	Total Due
0.00	0.00	0.00	0.00	658.25	658.25

Best Regards,

Related Articles

Notification Template
Add Task
Add Note

Send Email