

# AR Aging Management (Accounting) - Multiple Screen Enhancements (16657) [New Feature]

Last Modified on 05/15/2024 2:21 pm EDT

The following changes have been made to the AR Aging Management screen:

1. A drop down selection box has been added, offering two screen view options: Account Information or Contact Information.
  - o The Account Information view will retain the information that was previously displayed before these views were added.
  - o The Contact Information view will introduce additional columns: Has Active Service, Contact 1, and Contact 2. Meanwhile, the Account Manager, Auditor, and Bill Group columns are removed in this view.
2. The Export and Print buttons have been moved to the left of the Quick Filter drop down.
3. A Record count has also been added next to the AR Aging buckets.
4. AR Aging buckets have been moved inside the grey bar right above the grid.

The screenshot shows the AR Aging Management interface with the following components:

- Filters:** DIVISION (QAWASTE), TYPE (AR Aging By Past Due Date), ACCOUNT CLASS (COMMERCIAL), TERM (All), BILL GROUP (All), ACCOUNT MANAGER, ACCOUNT STATUS (Active, Bad Debt, C), AUDITOR, MIN. PAST DUE BALANCE.
- Buttons:** A green 'LOAD' button is on the right. Below the filters, there are 'Export' and 'Print' icons, a 'Select Quick Filter' dropdown, and a search bar.
- Table:** A table with columns: ACT ID, ACCOUNT NAME, CONTACT 1, CONTACT 2, STATUS, HAS ACTIVE SERVICE, AVG DAYS TO PAY, LAST PAYMENT, LAST COLLECTIO... ACTIVITY, CURRENT, 1-30, 31-60, 61-90, 91-120, OVER 120, TOTAL. A 'RECORD COUNT: 29' is displayed above the table.
- Callouts:**
  - 1: Points to the 'Contact Information' dropdown menu.
  - 2: Points to the 'Export' and 'Print' icons.
  - 3: Points to the 'RECORD COUNT: 29' text.
  - 4: Points to the aging bucket columns (1-30, 31-60, etc.).

| ACT ID           | ACCOUNT NAME          | CONTACT 1                                       | CONTACT 2 | STATUS      | HAS ACTIVE SERVICE | AVG DAYS TO PAY | LAST PAYMENT | LAST COLLECTIO... ACTIVITY | CURRENT | 1-30    | 31-60    | 61-90    | 91-120    | OVER 120 | TOTAL    |           |
|------------------|-----------------------|---|-----------|-------------|--------------------|-----------------|--------------|----------------------------|---------|---------|----------|----------|-----------|----------|----------|-----------|
| RECORD COUNT: 29 |                       |   |           |             |                    |                 |              |                            | TOTALS  | -346.31 | 0.00     | 9,216.96 | 76,950.67 | 1,291.91 | 6,298.03 | 93,411.26 |
| 48982            | Example Account 3     |   |           | Credit H... | Yes                | 0               |              |                            | 0.00    | 0.00    | 0.00     | 0.00     | 755.00    | 5,197.93 | 5,952.93 |           |
| 49031            | Li Cha Tea (T4 Cafe)  | PG pg@FakeEmail.com                             |           | Active      | Yes                | 0               |              |                            | 0.00    | 0.00    | 0.00     | 302.50   | 295.79    | 0.00     | 598.29   |           |
| 49032            | San Marino Cafe & ... |   |           | Active      | Yes                | 0               |              |                            | 0.00    | 0.00    | 117.50   | 158.50   | 0.00      | 0.00     | 276.00   |           |
| 49033            | Encanto Restaurant    |   |           | Active      | Yes                | 0               |              |                            | 0.00    | 0.00    | 370.44   | 118.25   | 0.00      | 0.00     | 488.69   |           |
| 49034            | Walgreens             |   |           | Active      | Yes                | 0               |              |                            | 0.00    | 0.00    | 767.50   | 611.64   | 0.00      | 0.00     | 1,379.14 |           |
| 49050            | Nothing Bundt Cakes   | Contact 1 Name contact1@FakeEm; +1 888-555-1234 |           | Active      | Yes                | 0               |              |                            | 0.00    | 0.00    | 167.50   | 23.18    | 0.00      | 0.00     | 190.68   |           |
| 49065            | Chloe Store           |   |           | Active      | Yes                | 0               |              |                            | 0.00    | 0.00    | 1,064.50 | 0.00     | 0.00      | 0.00     | 1,064.50 |           |
| 18535            | Example Account 4     | Lori S loris@FakeEmail.cc                       |           | Credit H... | Yes                | 32              | 07/19/23     |                            | -50.00  | 0.00    | 0.00     | 0.00     | 0.00      | 0.00     | -50.00   |           |
| 48969            | Staples Center        |   |           | Active      | Yes                | 0               | 12/20/23     |                            | -25.00  | 0.00    | 0.00     | 0.00     | 0.00      | 0.00     | -25.00   |           |

Pathway: Accounting > AR Aging Management