

Accounts Receivable: Aging Report

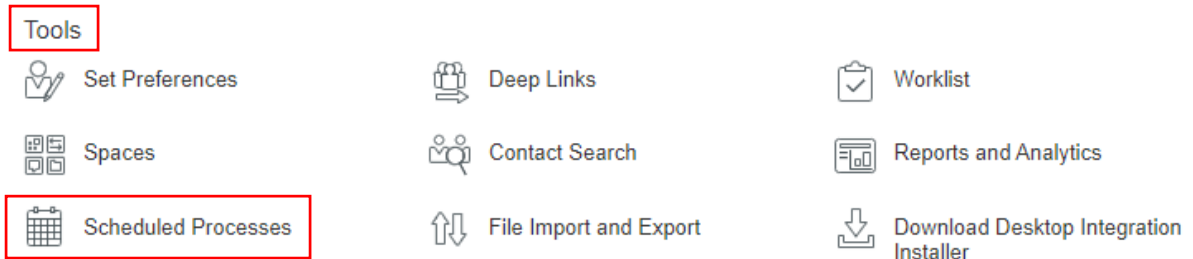
This job aid details the steps involved in running the AR Aging Report.

I. Navigate to the Tools Module

1. Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.

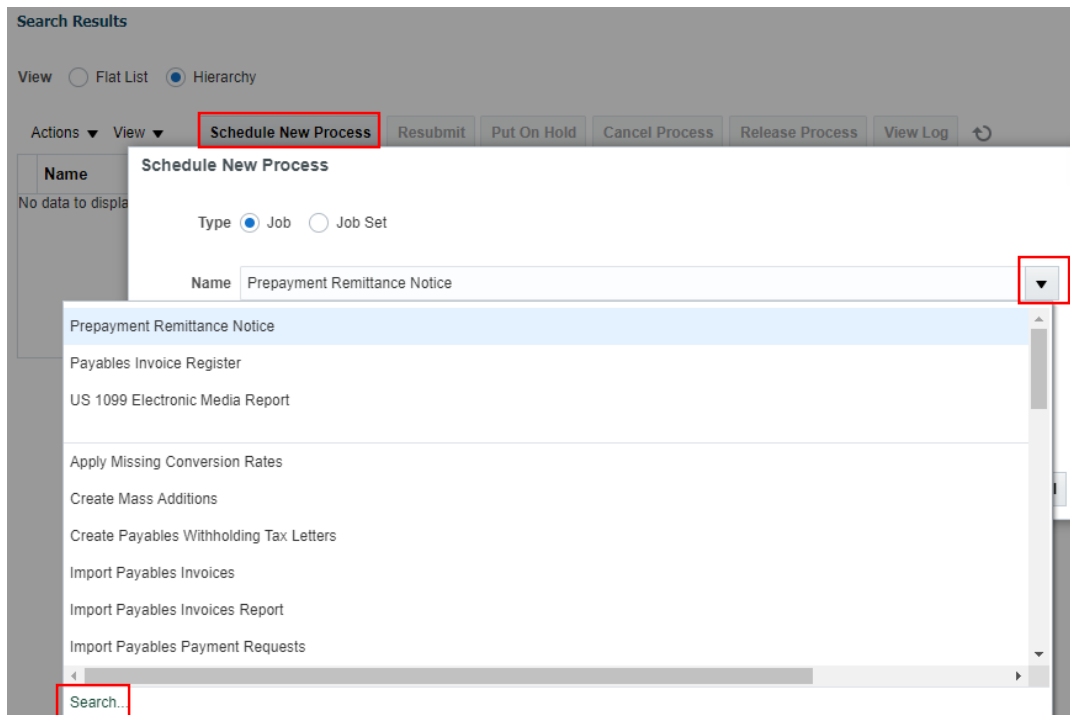


2. Under the **Tools** section, select **Scheduled Processes**.



2. Running the AR Aging Report

1. Click on the **Schedule New Process** tab then click on the **menu down arrow**.
Now, click the **Search** feature at the bottom of the open window.



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2. A new search window appears, enter **Receivables Aging by General Ledger Account Report** (case sensitive). Click **Search**. The report will appear in the results. **Highlight** the report name and click **OK**.

Search and Select: Name

Search

Name Receivables Aging by General Ledger Account Report

Search Reset

Name

Receivables Aging by General Ledger Account Report

OK Cancel

3. The Process Details window opens. Complete the required fields marked with an asterisk (*) using the below parameters for the report.

Process Details

This process will be queued up for submission at position 1

Process Options Advanced Submit Cancel

Name Receivables Aging by General Ledger Account Report

Description Lists outstanding receivable balances by genera...

Schedule As soon as possible Submission Notes

Print output

Notify me when this process ends

Basic Options

Parameters

* Reporting Level Ledger

* Reporting Context BAYLOR US

Balancing Segment 0 Filter Conditions Defined

* Transaction As-of Date 3/31/20

* Report Summary Invoice summary

* Report Format Brief

* Aging Bucket 7 Bucket Aging

* Show Open Credits Age

* Show Receipts at Risk Age

Entered Currency

From Customer Name

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- a. **Reporting Level** – Select **Ledger**
 - b. **Reporting Context** – Select **Baylor US**
 - c. **Transactions as of Date** – Select **date** (using the calendar icon)
 - d. **Report Summary** – Select **Customer Summary** or **Invoice Summary**
 - i. Customer Summary will show a total outstanding per customer
 - ii. Invoice Summary will show individual invoices per customer
 - e. **Report Format** – Select Brief or Detailed
 - f. **Aging Bucket** – Select **7 Bucket Aging**
 - g. **Show Open Credits** – Select **Age**
 - h. **Show Receipts at Risk** – Select **Age**
4. Select **Process Options**, then click **OK** on the popup window.

Process Options

Language: American English

Territory: United States

Time Zone: (UTC-06:00) Chicago - Central Time (CT)

Number Format: -1,234.567

Time Format: h:mm a (2:02 PM)

Date Format: M/d/yy (4/20/20)

Currency: US Dollar

OK Cancel

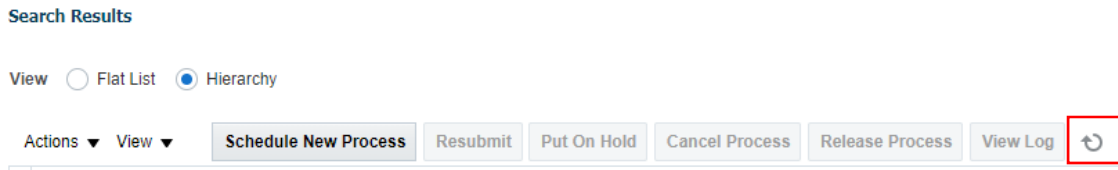
5. Click **Submit**.

Process Options Advanced **Submit** Cancel

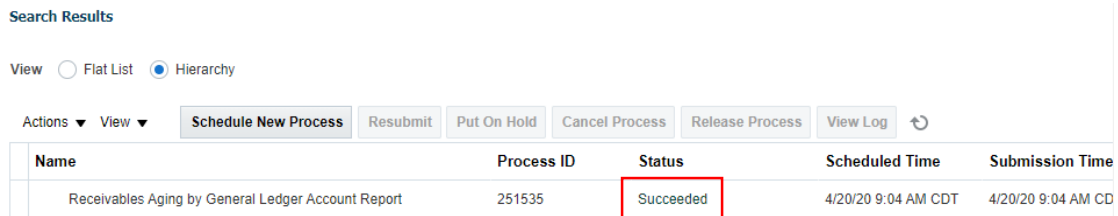
6. Another popup window will appear confirming the report was submitted. Click **OK**.

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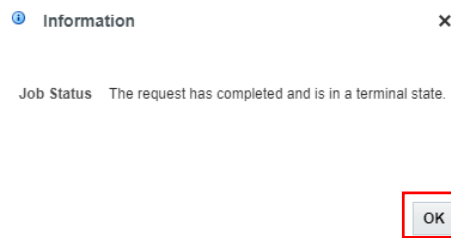
- Click the **Refresh icon**, next to the View Log tab, until the report appears in the results.



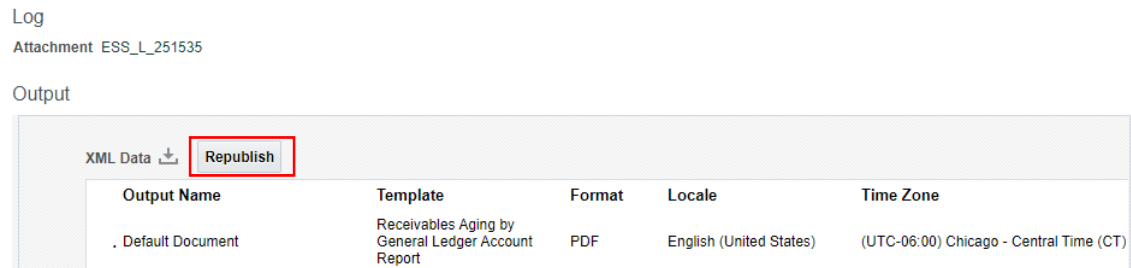
- Once the report appears, continue to **Refresh** until the Status shows **Succeeded**.



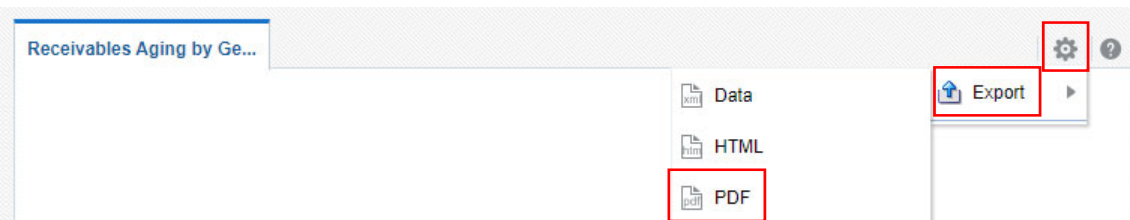
- Click on the word **Succeeded**. A popup window may appear regarding the Job Status, if it does, click OK.



- Scroll down to the **Output** section of the screen and click on **Republish**.



- Another window will open. Click on the **Gear icon**, then **Export**, then **PDF**.



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12. Select the location and file name for the PDF. Click **Save**.

13. The file can now be opened, reviewed, or shared with others as needed.