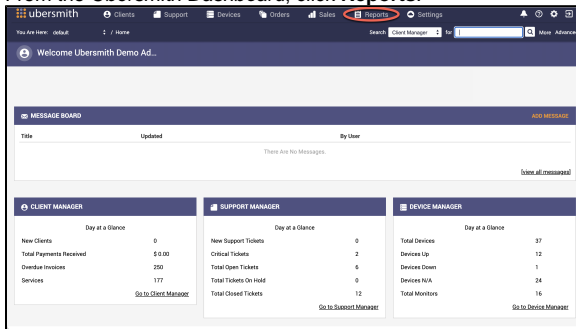


Using the Aged Balances Report

This report shows the totals of unpaid invoices and unapplied account credits broken down by due date. You can also show the totals at a particular date using the date picker on the top right. From the *Aged Balances* report, you can access the *Aged Invoices* and *Aged Credits* reports, to access client accounts and attend to the outstanding funds.

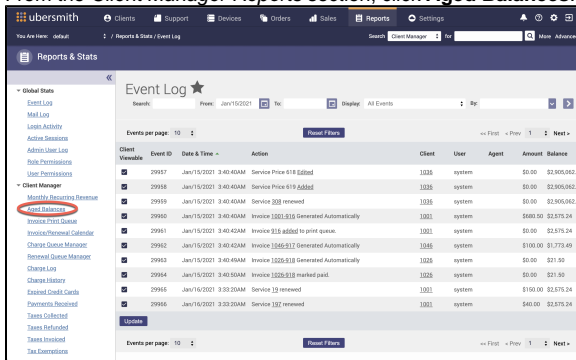
Accessing the Aged Balances Report

1. From the *Ubersmith Dashboard*, click **Reports**.



The *Reports & Stats* page appears.

2. On the *Reports & Stats* page, click the **Reports & Stats Panel** arrows to toggle the panel on. You can click the **pushpin** icon to keep the panel permanently displayed.
3. From the *Client Manager Reports* section, click **Aged Balances**.



The *Aged Balances* report appears.

Reading the Aged Balances Report

Once you access the *Aged Balances* report, you will see several ways to view unpaid invoices and unapplied account credits, broken down by due date.

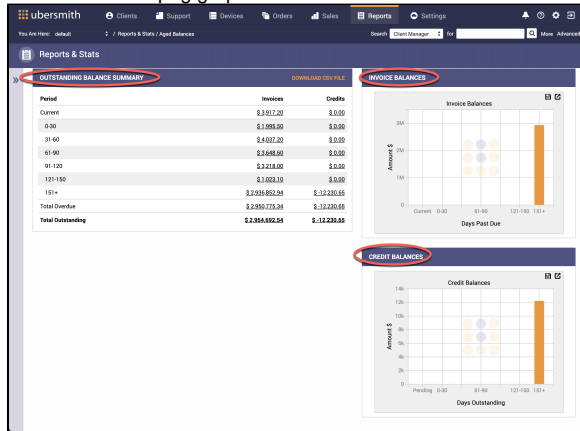
- The *Outstanding Balance Summary* section lists aged account balances broken down by outstanding invoices and unapplied credits for the current period, 0-30 day period, 31-60 period, and so on.
- The *Invoice Balances* section displays a graph that shows how many outstanding invoice have yet to be paid for a specified time period. You can display the graph in a bigger page and save it as a .png graphic file.

On this page:

On this page:

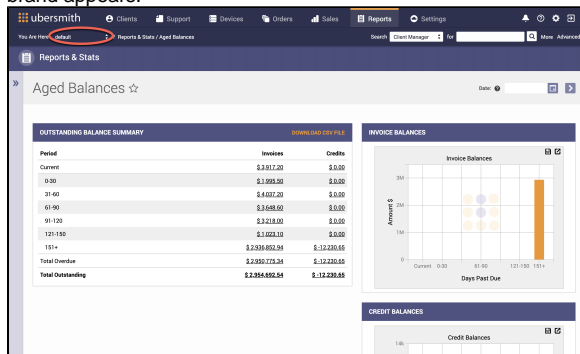
- [Accessing the Aged Balances Report](#)
- [Reading the Aged Balances Report](#)
- [Viewing Brand-Specific Aged Balances](#)
- [Viewing Aged Balances For Specific Dates](#)
- [Viewing Details About Aged Balances](#)
 - [For Aged Invoices](#)
 - [For Aged Credits](#)
- [Related Topics](#)

- The *Credit Balances* section displays a graph that shows how many account credits have not been applied to accounts for a specified time period. You can display the graph in a bigger page and save it as a .png graphic file.



Viewing Brand-Specific Aged Balances

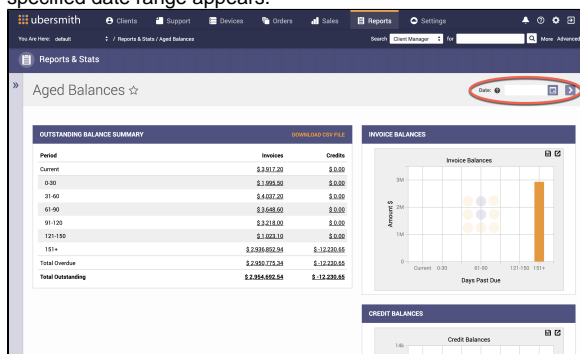
- Access the [Aged Balances](#) report.
- From the *Brand* section, select your desired brand . The *Aged Balances* report for the selected brand appears.



Viewing Aged Balances For Specific Dates

Search results return aged balances up to the date entered, and may not include invoices that are not closed for the date given.

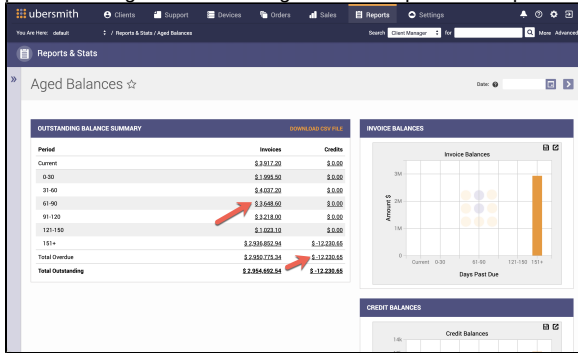
- Access the [Aged Balances](#) report.
- In the **Date** field, enter the beginning date of the date range you need.
- Click the **arrow** icon. The report with aged outstanding and past due balances within your specified date range appears.



Viewing Details About Aged Balances

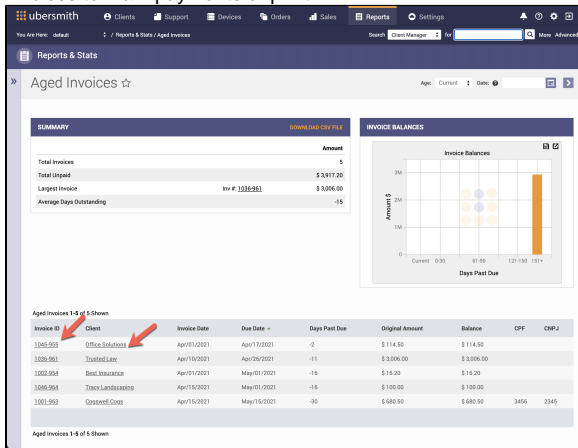
- Access the [Aged Balances](#) report.

2. In the *Outstanding Balance Summary* section, click an invoice or credit link for the desired period. The *Aged Invoices* or *Aged Credits* report for that period displays.



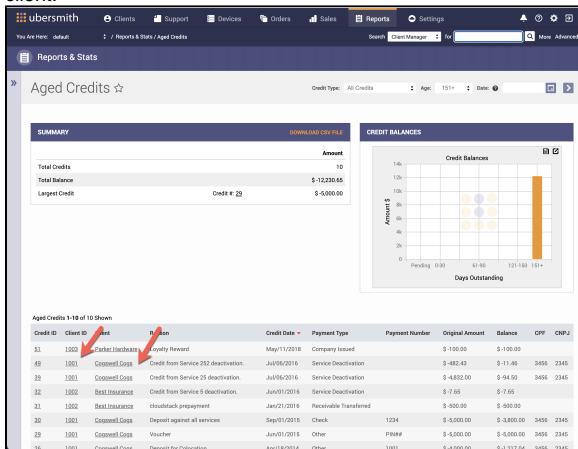
For Aged Invoices

1. Click on the **Invoice ID** link to display the specific invoice, where you can [mark payments](#), or print.
2. Click on the **Client** link to display the [Invoices](#) page, where you can view their entire list of invoices to mark payments or print.



For Aged Credits

1. Click on the **Client ID** or **Client** link to display the *Account Credits* page, where you can view credit details, add a note, edit, apply or deactivate a credit.
2. Click on the details link to display the specific read-only *Account Credit Details* page for your client.



Related Topics

[Managing Invoices](#)

