

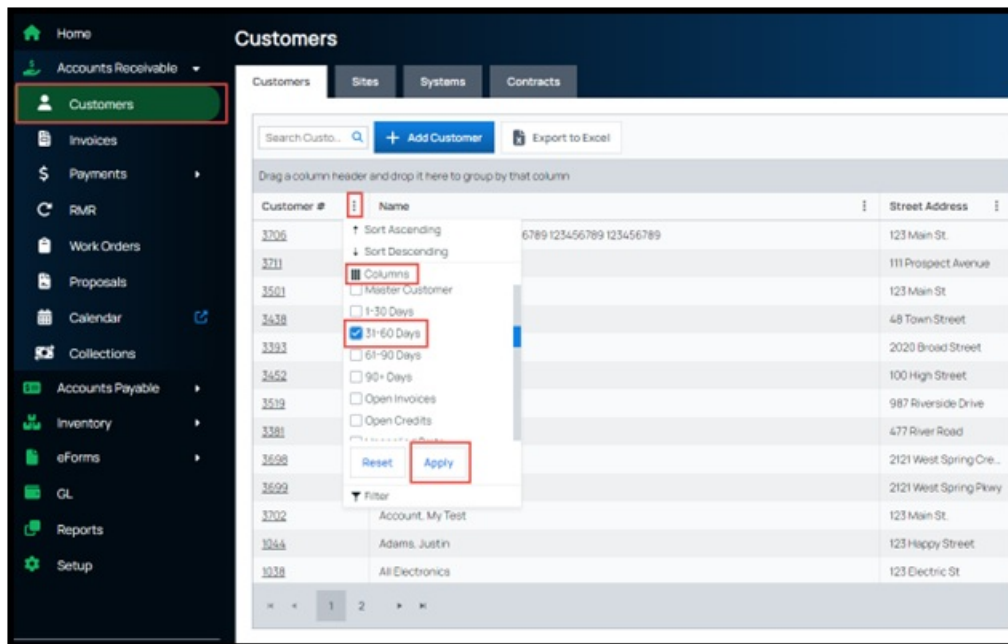
Managely – How to filter results (run a report) on who is delinquent 31-60 days

02/12/2024 6:09 pm EST

Managely gives users the ability to create their reports using the available column options.

To obtain a report on customers that are past due 31-60 days (delinquent 31-60 days), follow the steps below:

1. Click the Customers tab up top.
2. Click the three vertical dots (column menu) -> Columns -> checkmark the 31-60 days option -> click Apply:



3. Click the three vertical dots to the immediate right on the 31-60 Days column, go to filter, select 'is greater than or equal to', type 0.01 and push the filter button.

Home Accounts Receivable Customers Invoices Payments Bills Work Orders Proposals Calendar Collections Accounts Payable Inventory eForms GL Reports Setup

Customers

Customers Sites Systems Contracts

Search Customers Add Customer Export to Excel Master Customers Terminated Customers Custom Grid Layout

Drag a column header and drop it here to group by that column

Customer #	Name	Street Address	City	State	Balance Due	Total Bill	30-60 Days
2305	123456789 123456789 123456789 123456789	123 Main St	Cleveland	OH	\$91.94		
2301	25- Sites	101 Prospect Avenue	Cleveland	OH	\$26.00		
2501	A Business Company	123 Main St	Columbus	OH	\$679.46		
2438	Acourt, Alice	48 Town Street	Columbus	OH	\$1,595.98		
2303	Aaron's Rentals	2020 Broad Street	Columbus	OH	\$882.48		
2452	Ab Customer 1	1001 High Street	Dallas	TX	\$1,021.42		
2503	Ab Customer Sgs Site	987 Riverside Drive	Columbus	OH	\$50.00		
2301	Abkult International	477 River Road	Cincinnati	OH	\$1,928.31		
2608	Abc Pet Store	2121 West Spring Cre.	Piano	TX	\$457.70		
2609	Abc Store	2121 West Spring/Pony	Allen	TX	\$251.72		
2302	Account, My Test	123 Main St	Ann Arbor	MI	\$32.76	\$30.00	\$0.00
2304	Adams, Justin	123 Happy Street	Chagrin Falls	OH	\$8,965.81	\$945.00	\$56.36
2308	Air Electronics	123 Electric St	New York	NY	\$12,896.78	\$266.95	\$292.48

1 - 180 of 195 items Refresh

Filter: Greater than or equal to 0.01

Clear Filter

For convenience, the list can be exported to Excel.