

Standard Operating Procedure Printing Aging Reports by Rep

Dole & Bailey, Inc.

Implementation Date: 3/24/2023

PURPOSE: Proactively informing Sales Team regarding the AR collections that they are responsible for supporting.

RESPONSIBILITIES: Accounts Receivable Department

From Provisions Home Menu

1. Click on Receivables Menu
2. Click on Accounts Receivable Aged Trial Balance



Once you make the following selections it will default to this setting moving forward an only adjustment will be "6" to select actual Rep.

3. Select "Detail" so that it shows all invoices within the aging parameters
4. Select "Salesperson"
5. Select "Outside"
6. Select "Rep to Print"
7. Hit run and it will print PDF to screen and send a sharable file to User
8. Share within Teams to Rep, Sales Manager and Director of Sales

