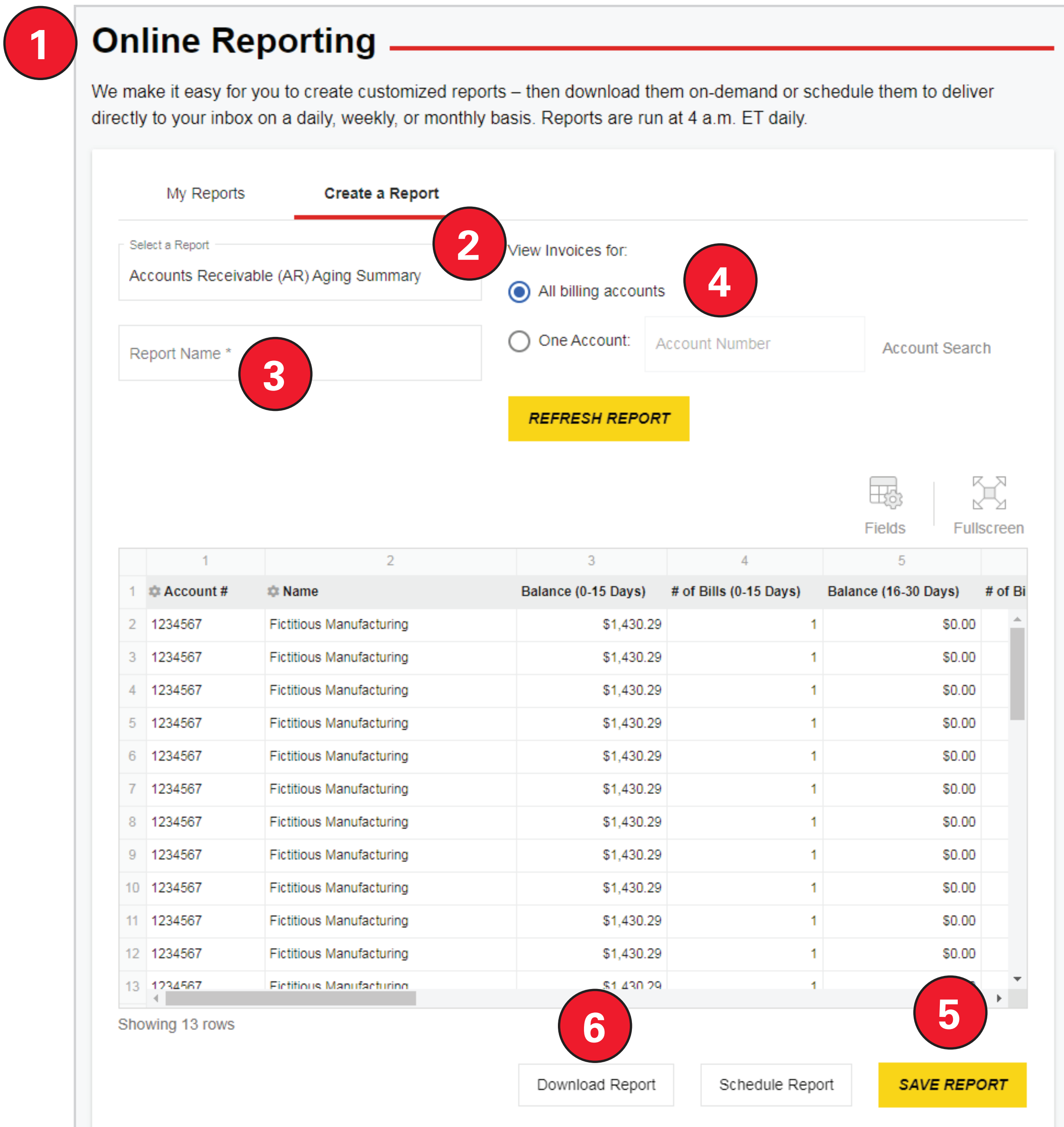
How to Create an AR Aging Summary Report

1. After logging into My Estes, go to the **Online Reporting** page.
2. Click **Create a Report** and select **AR Aging Summary**.
3. Next, give your report a name, by filling in the **Report Name** field.
4. Users with access to multiple accounts can choose to run reports that include data for all accounts, or data for a specific account only.
5. If you'd like to keep all available data columns as they appear by default, click **Save Report**. If you'd like to customize the layout of your report, please see the **How to Customize Your AR Aging Summary Report** section of this guide.
6. You can generate a report any time you would like to see a real-time snapshot of your data. To download a copy of your report directly to your desktop, click the **Download Report** button at the bottom of the screen.
7. Or for detailed instructions on how to schedule reports, please see the **How to Schedule Your AR Aging Summary Report** section of this guide.

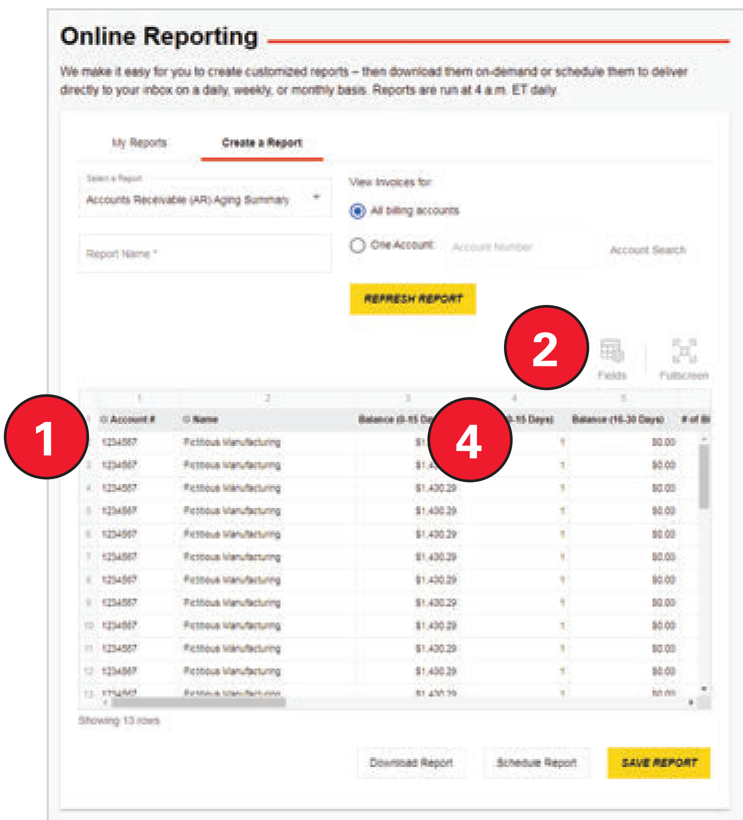


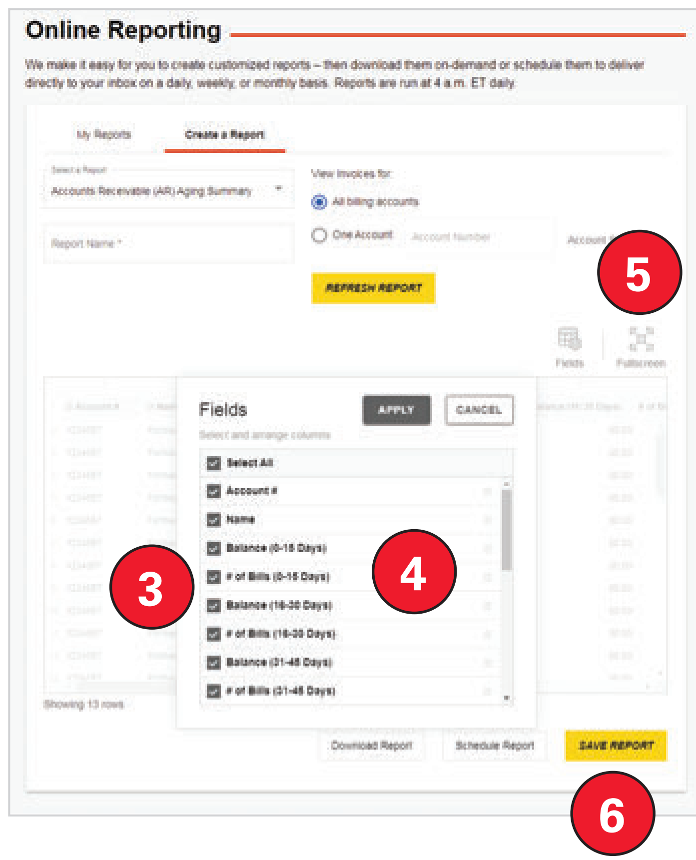
How to Customize Your AR Aging Summary Report

1. When you first create your report, all of the available data columns will be presented to you. These columns may be removed, rearranged, or filtered to meet your needs.
2. If you'd like to customize the data you see in your report, click the **Fields** icon, just above the data fields on the right hand side.
3. This will pull up a list of possible data field columns. To de-select a column, simply click the **check box** to the left of its name. You can also de-select all columns by unchecking the **Select All** box.

   Please note: Removing fields from your report does not remove the data from our system. Should you wish to restore any data fields you've previously removed, simply click on the Fields icon, and re-select the data fields you'd like to see.

4. If you would like to reorder the data fields, start by clicking on the **column name** to select the column. Without releasing the click, drag the column to its desired location. Columns may be reordered on the spreadsheet as well as in the Fields window.
5. At any time during the customization process, you can view your report in fullscreen mode. Simply click the **Fullscreen** icon immediately to the right of the Fields icon.
6. When you're finished customizing the layout of your report, be sure to save your changes. To do this, click **Save Report** on the bottom right side of your screen.





How to Schedule Your AR Aging Summary Report

1. Once you've saved your report, you can create a schedule by which it is sent to specific recipients at the frequency of your choosing. To do this, click **Schedule Report** on the bottom right side of your screen.
2. To set your **report frequency**, use the drop-down menu to select whether you'd like to run the report daily, weekly, or monthly. Note that reports will be run at 4:00 a.m. EST on the dates selected.
3. You can also set your **report duration** by choosing whether you want to run your report just once, until a specific end date, or indefinitely.
4. Once you've created a schedule, you can choose that your report be sent to **as many as ten recipients** by entering their email addresses into the designated field (one per line).
5. Finally, you can use the drop-down menu to choose your preferred **report format**: Excel worksheet file format (.xlsx) or text/CSV format (.csv).
6. After making your selections, click the **Submit** button.
7. Click **Save Report**.