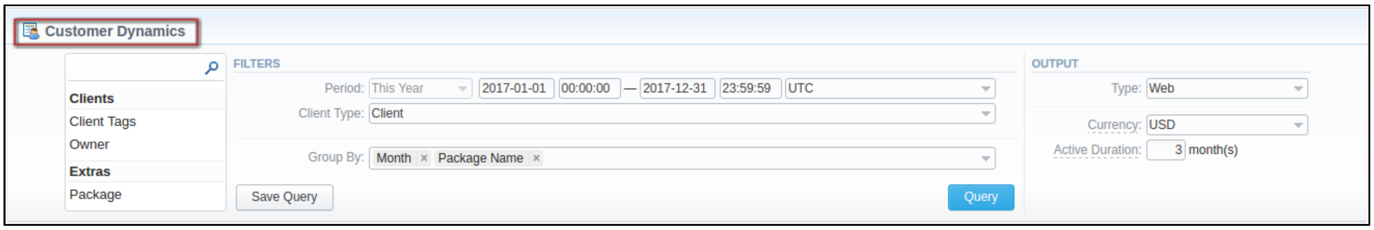
Customer Dynamics

On this page

This section enables to generate statistics reports and get state snapshots of clients, balances, package's usage. Customer Dynamics is designed to easily illustrate the data for analyzing and improving efficiency. Here reports are presented in the form of the table. However, you can create a chart to effectively interpret key information and facilitate the decision-making process.

Screenshot: Customer Dynamics section/query form



To create new report

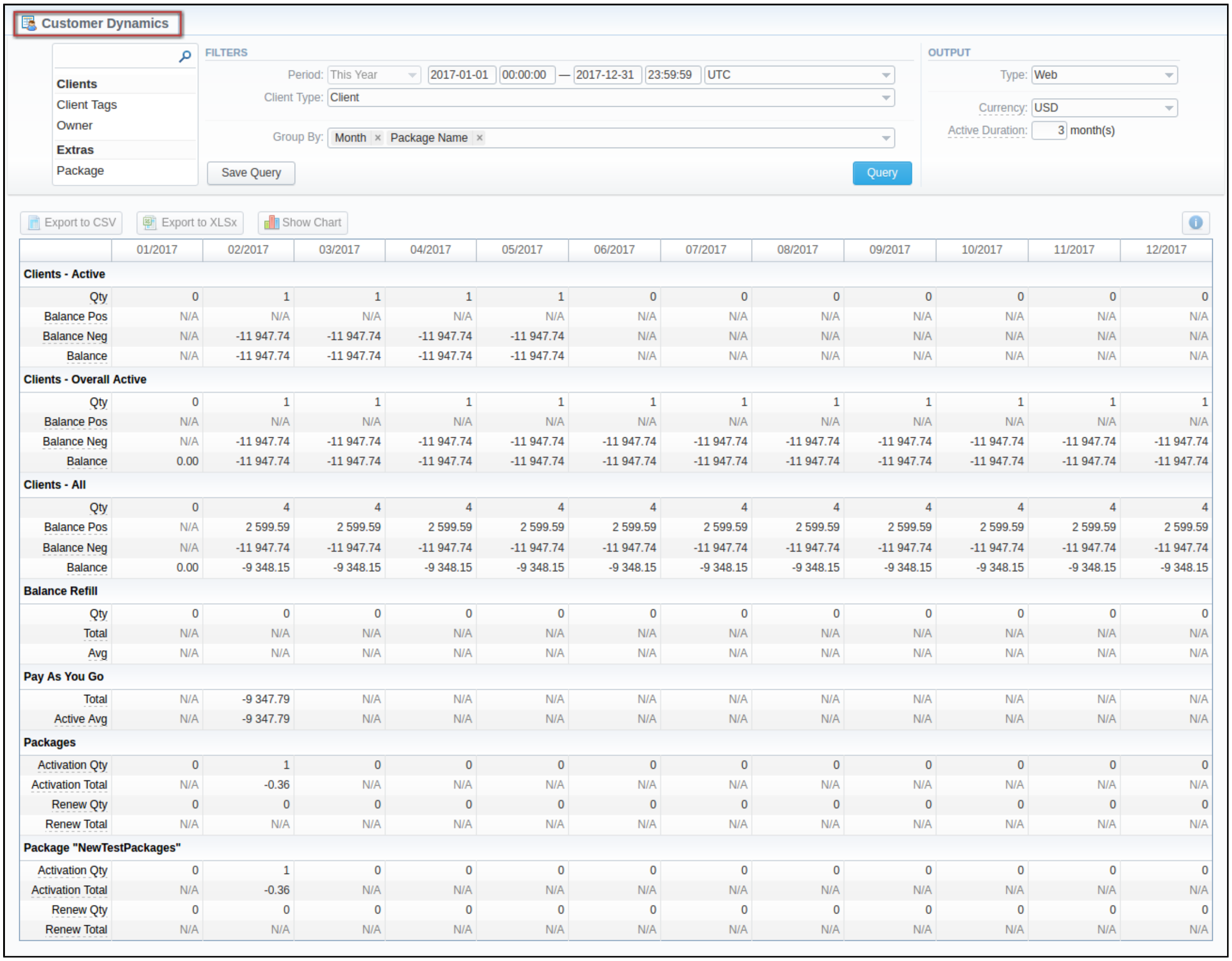
In order to create a statistic report go to the ***Statistics*** and open the ***Customer Dynamics*** *section.* Then you need to fill out the form with next parameters:

Section	Field Description	
Filters	On the ***Filters*** menu, select convenient parameters for the report. To cancel any filter, click the delete sign next to the filter. You can start a **quick search** by typing filters' names in the bar at the top of a drop-down menu with filters. It will display all filters with taped letters.	
	Period	Specify an interval for the report. Please note, that the *"Period"* field is mandatory.
	Client Type	Choose a respective parameter for statistics data: *Client/Reseller/Calling Card/Call Shop.*
	Additional Filters	
	There are following accessible additional filters: • ***By clients*****:** *Client Tags, Owner.* • ***Extras:*** *Package.*	
	Client Tags	Select labels to filter clients and show more detailed results in the report
	Owner	Define a reseller for the report
	Package	Enter a package for the report
Group By	There are following accessible options to group the data in reports: • ***Time:*** *Year, Month, Date.* • ***Package Name****.*	
Output	This form contains settings of the output data of the report.	
	Type	Choose a format of the report from a drop-down list: *Web/CSV/Excel XLS/Excel XLSx.*
	Send to	You can send generated reports via e-mail. For example, it is useful when it takes a lot of time to run the report. Also, it is possible to specify several e-mails. This feature is available only for *CSV/Excel XLS/Excel XLSx* formats of the report, it doesn't work with *Web*.

	Currency	Specify a currency for the report. And all values will be automatically converted in the report to the specified currency.	
	Active Duration	Determine the period (in months). If the customer has used any paid services within this period, he will be considered as an active client.	

After selecting all needed parameters, click ***"Query"*** button and the system will generate a report:

Screenshot: Customer Dynamics report example



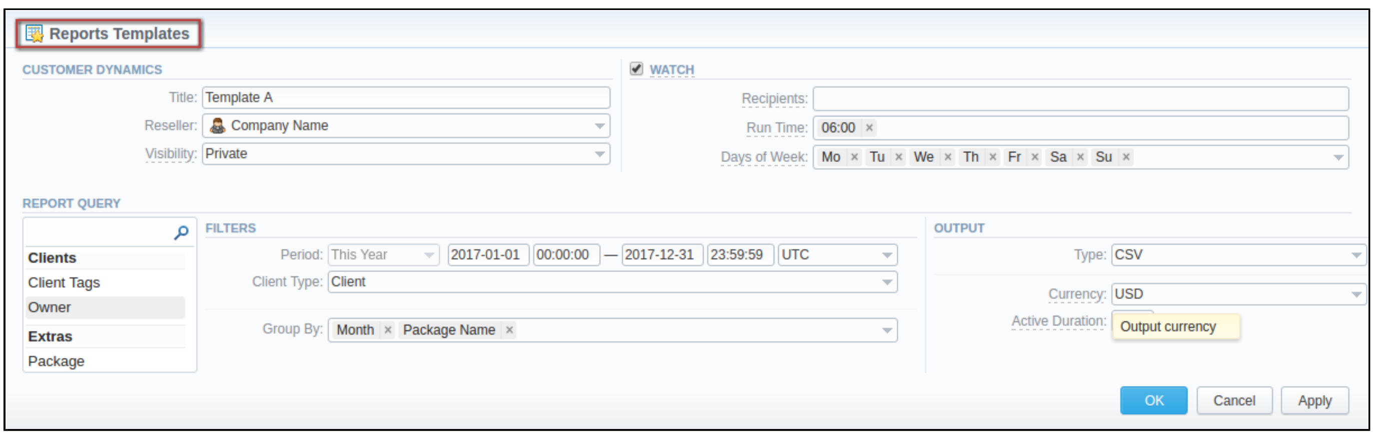
	01/2017	02/2017	03/2017	04/2017	05/2017	06/2017	07/2017	08/2017	09/2017	10/2017	11/2017	12/2017
Clients - Active												
Qty	0	1	1	1	1	0	0	0	0	0	0	0
Balance Pos	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Balance Neg	N/A	-11 947.74	-11 947.74	-11 947.74	-11 947.74	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Balance	N/A	-11 947.74	-11 947.74	-11 947.74	-11 947.74	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Clients - Overall Active												
Qty	0	1	1	1	1	1	1	1	1	1	1	1
Balance Pos	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Balance Neg	N/A	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74
Balance	0.00	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74
Clients - All												
Qty	0	4	4	4	4	4	4	4	4	4	4	4
Balance Pos	N/A	2 599.59	2 599.59	2 599.59	2 599.59	2 599.59	2 599.59	2 599.59	2 599.59	2 599.59	2 599.59	2 599.59
Balance Neg	N/A	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74	-11 947.74
Balance	0.00	-9 348.15	-9 348.15	-9 348.15	-9 348.15	-9 348.15	-9 348.15	-9 348.15	-9 348.15	-9 348.15	-9 348.15	-9 348.15
Balance Refill												
Qty	0	0	0	0	0	0	0	0	0	0	0	0
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Avg	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Pay As You Go												
Total	N/A	-9 347.79	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Active Avg	N/A	-9 347.79	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Packages												
Activation Qty	0	1	0	0	0	0	0	0	0	0	0	0
Activation Total	N/A	-0.36	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Renew Qty	0	0	0	0	0	0	0	0	0	0	0	0
Renew Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Package "NewTestPackages"												
Activation Qty	0	1	0	0	0	0	0	0	0	0	0	0
Activation Total	N/A	-0.36	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Renew Qty	0	0	0	0	0	0	0	0	0	0	0	0
Renew Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Title	Description
Clients Active	This subdivision shows statistic data of customers that actively use services according to the period specified in the *"Active Duration"* field • *Qty* - Overall number of clients that used any paid services within last *"Active Duration"* period. • *Balance Pos* - Total of all positive balances for the clients that used any paid services within last *"Active Duration"* period. • *Balance Neg* - Total of all negative balances for the clients that used any paid services within last *"Active Duration"* period. • *Balance* - Total of all balances for the clients that used any paid services within last *"Active Duration"* period.
Clients Overall Active	It displays statistic data of customers that actively used paid services at any time • *Qty* - Total quantity of clients that used any paid services at any time. • *Balance Pos* - Total of all positive balances for the clients that used any paid services at any time. • *Balance Neg* - Total of all negative balances for the clients that used any paid services at any time. • *Balance* - Total of all balances for the clients that used any paid services at any time.

Clients All	It presents all customers according to the filter settings • *Qty* - Total quantity of clients according to current filters. • *Balance Pos* - Total of all positive balances for the clients according to current filters. • *Balance Neg* - Total of all negative balances for the clients according to current filters. • *Balance* - Total of all balances for the clients according to current filters.
Balance Refill	• *Qty* - Number of balance refills during period. • *Total* - Total amount of balance refills during period. • *Avg* - Average amount of each refill during period.
Pay As You Go	• *Total* - Total amount spent on any services out of subscription plans. • *Active Avg* - Average amount of "Pay as you Go" services usage per currently active customers.
Packages	• *Activation Qty* - Number of packages activations during period. • *Activation Total* - Total amount charged for all activations of the packages. • *Renew Qty* - Number of packages renewals during period, including initial "renew" within activation of the package. • *Renew Total* - Total amount charged for packages renewals during period, including initial "renew" within activation of the package.

Also, you can create a template for reports and save specified parameters by clicking ***"Save Query"*** button. A pop-up window with settings will appear and you need to fill out the following form:

Screenshot: New Template form



To find more details about templates, please refer to the *Report Templates* article in our **User Guide.**

Customer Dynamics toolbar: export, chart.

You can export data to a *CSV* and *XLSx* file which contains only currently presented data, no automatic request to update data while exporting. Also, it is possible to create charts for easily illustrating a crucial information. And you can generate a report using the same criteria in the *Orig-Term report* and the *CDRs list* sections.

1. To download a report in *.csv,* click the *"Export to CSV"* button on the toolbar.

2. To download a *.xlsx* file, click the *"Export to XLSx"* button on the toolbar.

3. To create a visual chart, click the *"Show Chart"* button on the toolbar. There is more information available on this topic in the article **"How to create a statistic chart?**" at our Knowledge Base. From the drop-down list on this option, you can find the next pre-configured templates for chart:

- *Clients - Active: Qty*
- *Balance Refill: Total*
- *Pay as you Go: Total*
- *Packages: Renew Total*

Therefore, you can create a new template based on currently configured charts or select "Blank Chart" to have a new empty worksheet for configuring custom templates

4. You can check an ***actual date interval*** by clicking the *Info icon*  .

Best practice example

If you would like to check information of a specific package usage along with it short description (number of activations, renewals, totals, frequency of package use and assignment). Moreover, you can compare results of different periods and plot data in the chart.

Screenshot: Customer Dynamics section/chart