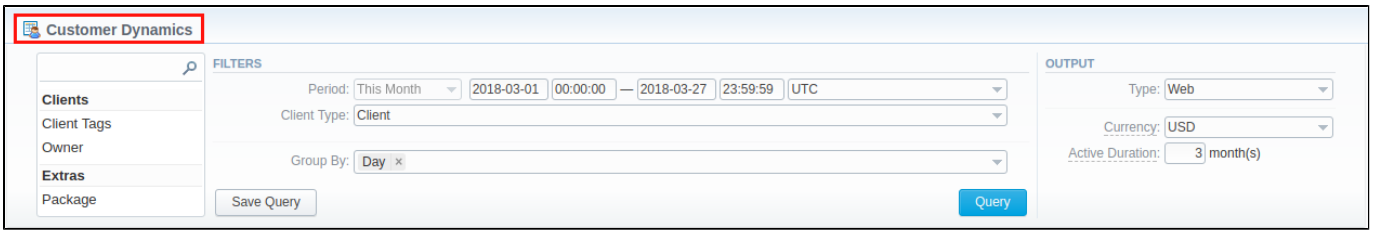
Customer Dynamics

In this article

Section overview

The **Customer Dynamics** section is designed to illustrate the data for analyzing and improving efficiency easily. Here, reports are presented in the form of a table. However, you can create a chart to interpret key information effectively and facilitate the decision-making process.

Screenshot: Customer Dynamics section/query form



Creating a New Report

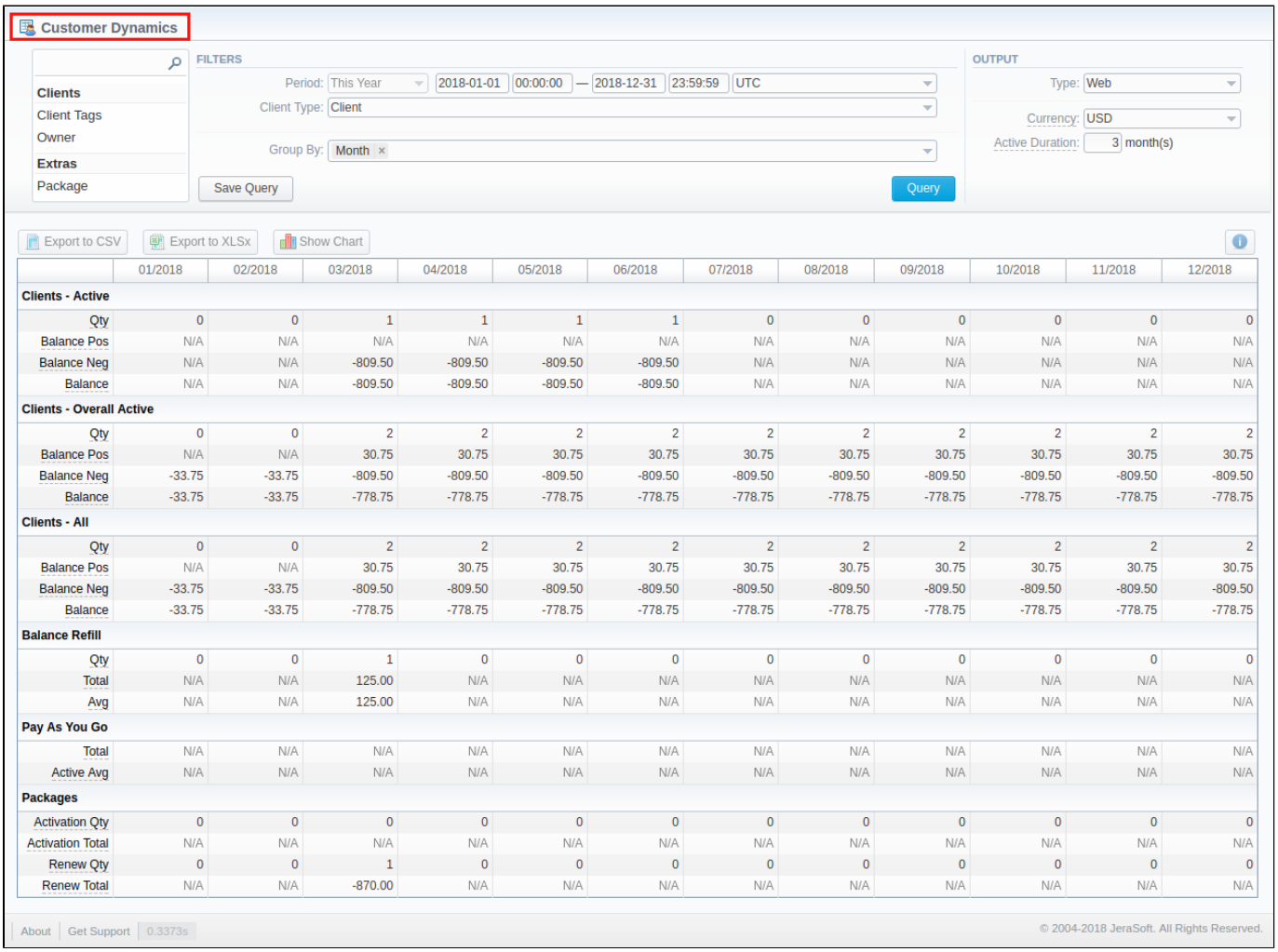
To generate a report, you need to fill in the form and click the **Query** button. The query form consists of the following parameters:

Information Block	Field Description	
Filters	On the **Filters** menu, select the required parameters for the report. To cancel any filter, click on the delete icon next to the filter. You can start a **quick search** by typing filters' names in the field at the top of a drop-down menu with filters.	
	Period	Specify the time interval for the report and a timezone. Please note that the ***Period*** field is mandatory.
	Client Type	Select a client type from a drop-down list of the following options: • ***Client*** • ***Reseller*** • ***Calling Card*** • ***Call Shop***
	Additional Filters	
	There are the following accessible additional filters: • ***By clients:*** *Client Tags, Owner.* • ***Extras:*** *Package.*	
	Client Tags	Specify certain tags 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 the following accessible options to group the data in reports: • ***Time:*** *Year, Month, Date.* • ***Extras:*** *Package Name.*	
Output	This form contains settings for 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 email. Also, it is possible to specify several emails. ⚠️ **Attention** 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. All values will be automatically converted to the specified currency in the report.
Active Duration	Determine the period (in months). If the customer has used any paid services within this period, (s)he will be considered an active client.

A generated Customer Dynamics report is demonstrated on a screenshot below:

Screenshot: Customer Dynamics report



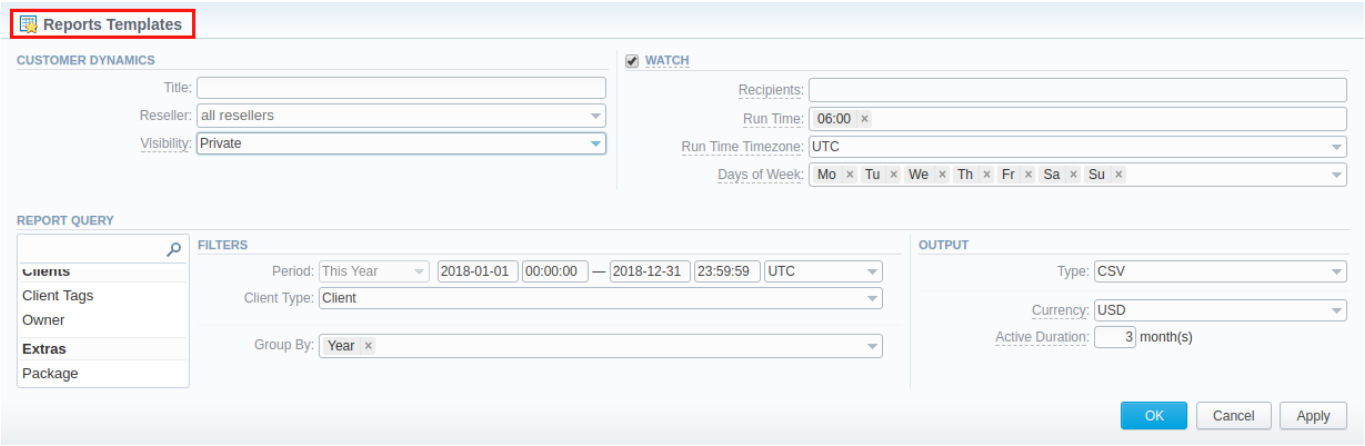
	01/2018	02/2018	03/2018	04/2018	05/2018	06/2018	07/2018	08/2018	09/2018	10/2018	11/2018	12/2018
Clients - Active												
Qty	0	0	1	1	1	1	0	0	0	0	0	0
Balance Pos	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Balance Neg	N/A	N/A	-809.50	-809.50	-809.50	-809.50	N/A	N/A	N/A	N/A	N/A	N/A
Balance	N/A	N/A	-809.50	-809.50	-809.50	-809.50	N/A	N/A	N/A	N/A	N/A	N/A
Clients - Overall Active												
Qty	0	0	2	2	2	2	2	2	2	2	2	2
Balance Pos	N/A	N/A	30.75	30.75	30.75	30.75	30.75	30.75	30.75	30.75	30.75	30.75
Balance Neg	-33.75	-33.75	-809.50	-809.50	-809.50	-809.50	-809.50	-809.50	-809.50	-809.50	-809.50	-809.50
Balance	-33.75	-33.75	-778.75	-778.75	-778.75	-778.75	-778.75	-778.75	-778.75	-778.75	-778.75	-778.75
Clients - All												
Qty	0	0	2	2	2	2	2	2	2	2	2	2
Balance Pos	N/A	N/A	30.75	30.75	30.75	30.75	30.75	30.75	30.75	30.75	30.75	30.75
Balance Neg	-33.75	-33.75	-809.50	-809.50	-809.50	-809.50	-809.50	-809.50	-809.50	-809.50	-809.50	-809.50
Balance	-33.75	-33.75	-778.75	-778.75	-778.75	-778.75	-778.75	-778.75	-778.75	-778.75	-778.75	-778.75
Balance Refill												
Qty	0	0	1	0	0	0	0	0	0	0	0	0
Total	N/A	N/A	125.00	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Avg	N/A	N/A	125.00	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	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Active 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
Packages												
Activation Qty	0	0	0	0	0	0	0	0	0	0	0	0
Activation 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
Renew Qty	0	0	1	0	0	0	0	0	0	0	0	0
Renew Total	N/A	N/A	-870.00	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 statistical 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 the last ***Active Duration*** period. • ***Balance Pos*** - Total of all positive balances for the clients that used any paid services within the last ***Active Duration*** period. • ***Balance Neg*** - Total of all negative balances for the clients that used any paid services within the last ***Active Duration*** period. • ***Balance*** - Total of all balances for the clients that used any paid services within the last ***Active Duration*** period.

Clients - Overall Active	Here a statistic data of customers that actively used paid services at any time is displayed • ***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 the specified period. • ***Total*** - Total amount of balance refills during the specified period. • ***Avg*** - Average amount of each refill during the specified period.
Pay As You Go	• ***Total*** - Total amount spent on any services out of package 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 the specified period. • ***Activation Total*** - Total amount charged for all activations of the packages. • ***Renew Qty*** - Number of packages renewals during the specified period, including initial ***renew*** within the activation of the package. • ***Renew Total*** - Total amount charged for packages renewals, during the specified period, including initial ***renew*** within the activation of the package.

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

Screenshot: New Template form



Tip

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

Customer Dynamics buttons: export, chart.

You can export data to a **CSV** and **XLSx** file, which contains only currently displayed data, with no automatic request to update data while exporting. Also, it is possible to create charts for illustrating crucial information easily:

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

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

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

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

Therefore, you can create a new chart or select ***Blank Chart*** to have a new empty worksheet for configuring a custom chart

4. You can check an actual date interval by clicking on the **Info** icon. The displayed data could be different from the Interval specified above if there is no data for the period.

Screenshot: Customer Dynamics chart