Profit Report

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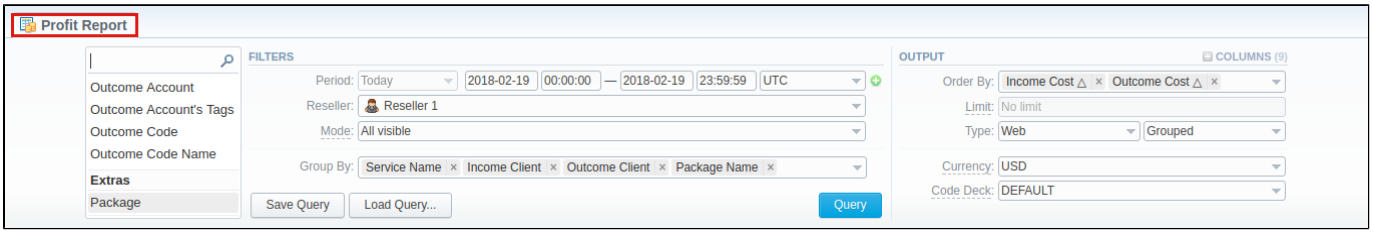
Section overview

This section allows generating the profit report, which analyzes profitability data and defines profits between **Reseller** parties (companies and managers) and **Clients** belonging to the respective Reseller/Manager.

For example, when **Manager_1** executes a profitability report, it allows seeing their origination customers sending traffic to **Manager_2**, who owns the actual terminator vendors. In this case, Reseller's permissions apply to every query, which guarantees that **Manager_1** will **not** be able to see any actual name of a client belonging to another manager, or another party that restricts such access.

Screenshot: Profit Report query form



Creating a Profit Report

To generate a profit report, you need to fill in the required parameters in the form and click the **Query** button. To get information sorted, use the ***Group by*** o ption and choose respective values from the drop-down list.

The list of query fields is as follows:

Information block	Field Description	
Filters	On the **Filters** menu, select the required parameters for the report. To cancel any filter, click the delete icon next to the filter. You can start a **quick search** by typing filters' names in the field at the top of the drop-down menu with filters.	
	Period (1)	Specify the time interval for the report and a timezone. Please note that the ***Period*** field is mandatory.
	Period 2	Accessible when you enable the **Compare Period** option by clicking on the plus icon next to the ***Period***. Specify the second interval for the report. **Tip** When you select one of the **Time** parameters for **Group by**, the end date of the ***Period 2*** will be set automatically to make equal intervals of ***Period 1*** and ***Period 2***.
	Reseller	Specify the name of a target Reseller.
	Mode	Choose the mode of the report: • ***All visible*** - all represented visually. • ***Hide External Originators*** - all external originators of the selected manager will not be displayed. • ***Hide External Clients*** - only events made solely between clients of the chosen manager will be shown. By default, the field value is set to ***All visible***

	Group by	Select a grouping option. Here you can choose and swap columns, as well as change their order. There are the following accessible options to group data in reports: • ***Time:*** *Year, Month, Day, Hour.* • ***Clients***: *Income Client, Income Account, Income Code, Income Code Name, Orig Rate, Outcome Client, Outcome Account, Outcome Code, Outcome Code Name.* • ***Extras:*** *Service Name, Income Series.* **Attention** Please note, the ***Group by*** field is mandatory, it couldn't be left empty to generate the report.
	Additional Filters	
	There are the following accessible filters: • ***Clients*****:** *Income Client, Income Client's Tag, Income Account, Income Account's Tag, Income Code, Income Code Name, Income Serial, Income Reseller, Outcome Client, Outcome Client's Tag, Outcome Account, Outcome Account's Tag, Outcome Code, Outcome Code Name.* • ***Extras:*** *Package*	
	Income Client	Specify an origination client(s) for the report
	Income Client's Tag	Specify a tag(s) assigned to origination clients
	Income Account	Determine an origination client's account(s)
	Income Account's Tag	Indicate origination account's tags
	Income Code	Define an incoming code
	Income Code Name	Specify an incoming code name
	Income Serial	Indicate a serial number of the originator's calling card
	Income Reseller	Specify a target reseller(s) for the report
	Outcome Client	Define a termination client(s)
	Outcome Client's Tag	Define a termination client's tag(s)
	Outcome Account	Indicate an account(s) of the termination client(s) for the report
	Outcome Account's Tag	Specify termination account's tags if any
	Outcome Code	Specify a termination code of the client
	Outcome Code Name	Indicate a termination code name
	Package	Determine the name of the used package
Output	This form contains settings of the report output data. Click a plus sign next to ***Columns*** and select required columns to add them to the Output information block. Also, you can cancel any chosen item.	
	Accessible columns in the report	

Additional columns of the report are:

Columns for the main period:

Volume Total, Income Cost, Income Avg Rate, Income Billed Time, Outcome Cost, Outcome Avg Rate, Outcome Billed Time, Profit, Profit (%).

Columns for the comparative period:

Total time, min; Income Rate, Outcome Rate, Income Cost, Income Avg Rate, Income Billed Time, Outcome Cost, Outcome Avg Rate, Outcome Billed Time, Profit, Profit (%), Profit Difference.

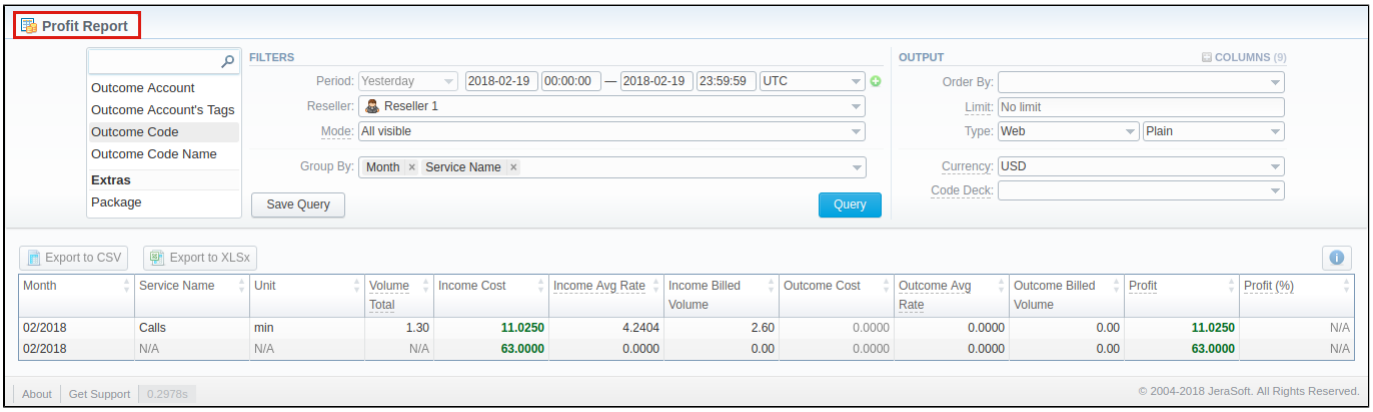
And it's possible to choose each parameter expressed in percentage.

Volume Total	Total time of calls in minutes
Rate	The call rate • ***Income Avg Rate*** - an average call rate that is used for origination • ***Outcome Avg Rate*** - an average call rate that is used for termination
Profit	The revenue • ***Profit*** - a revenue in a respective currency (in fact, any system currency can be specified here) • ***Profit (%)*** - a revenue in percent value
Time	The billed time • ***Income Billed Volume*** - the whole billed time for origination • ***Outcome Billed Volume*** - the whole billed time for termination
Cost	The call cost • ***Income Cost*** - a call cost that is used for origination • ***Outcome Cost*** - a call cost that is used for termination
Other output settings	
Order by	Select parameters to sort already grouped data in columns. There are the following accessible options to order the data: ***by Time, Clients, Extras***. Here you can sort data ***from highest to lowest values*** (or vice versa) and select different values.
Type	Choose a report format from a drop-down list: **Web/CSV/Excel XLS/Excel XLSx** Also, select a table view next to the ***Type*** field: • ***Plain*** - a simple table view • ***Grouped*** - a table view with grouped data and possibility to collapse/expand it ⚠ **Attention** Please note that the **Grouped** type of a table view is available only for **Excel XLSx** and **Web** formats, it doesn't work with **CSV**.
Limit	Determine the number of rows that will be visible in the report. It is useful for displaying some top positions by a chosen parameter. It is available only for the ***plain*** type of report.
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.

	Code Deck	Using a drop-down list, select a respective code deck. All code names will be rewritten and presented according to the specified code deck. If there is no value specified, the code deck assigned to the Client or Rate Table will be in usage.

A generated profit report is demonstrated on a screenshot below:

Screenshot: Profit report section



If the data is grouped in the report, it will be shown initially collapsed. To expand or collapse data in your report, click the plus or minus icons.

Warning

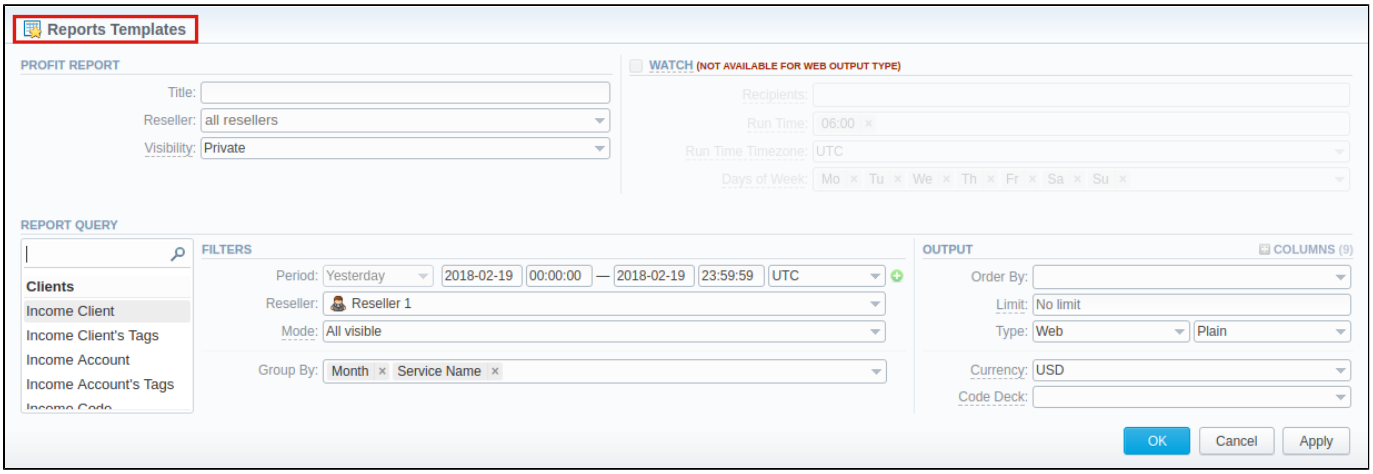
Please note, the system shows rounded values in the reports. However, while calculating the system takes an exact value. Hence, the procedure of the rounding is as follows:

- the system rounds currency values according to the settings of a respective currency;
- other parameters are rounded to the nearest ten thousandths. For example 3.879256 to 3.8793.

Creating a Query Template

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

Screenshot: New Template form



Section	Description	
Profit Report	Here you can specify parameters for the template that will be used while running reports	
	Title	Specify a name of the template
	Reseller	Indicate a Reseller of the report template

	Visibility	It allows controlling the visibility of respective reports templates. Whether you want to keep templates private or leave them visible for users under a specified Reseller. To enable this option, select one parameter from the drop-down list: • ***Public*** **-** available for users according to the settings of the ***Reseller*** field; • ***Private*** **-** accessible strictly for a creator.
Watch	This tool allows to generate reports automatically at the appropriate time and send the results to the list of e-mails **Attention** Please note, this tool is not available for **Web** output type, only for **CSV/Excel XLS/Excel XLSx**.	
	Recipients	Specify recipients: it can be your own email, other users of the system or even 3rd parties
	Run Time	Define an appropriate time to generate a report automatically. It could be several times, for example, ***10:00, 12:00, 18:00***
	Days of Week	Indicate days of the week to generate a report automatically. For example, you can run a report only on Monday or each day of week
Report Query	Here you need to specify filters that will be used for generating a correct report and choose the output type to view the report.	

To preview or load already existing templates while generating statistic reports, click the **Load Query** button and click on a template name or a icon, respectively.

Export a Generated Report

You can export data to **XLSx** or **CSV** file, which contains currently presented data by clicking the **Export to XLSx** or **Export to CSV** button respectively. Please note that **Export to CSV** is available only when the ***Type*** of the output is **Plain**.

Attention

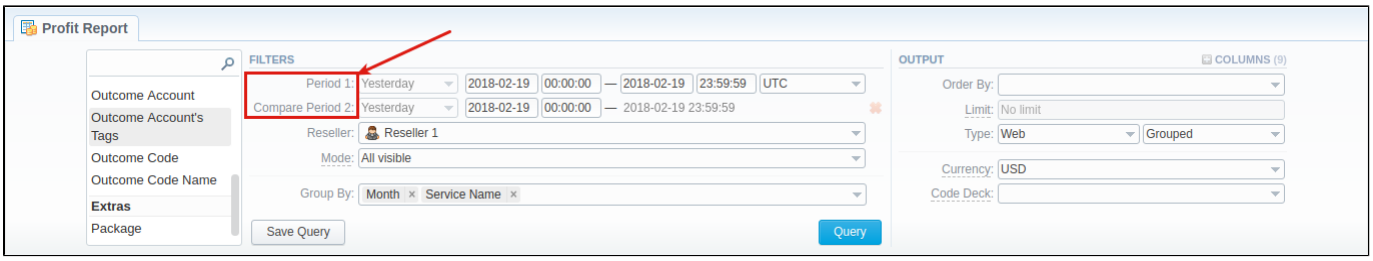
You can check an ***actual date interval*** of the report by clicking the **Info** icon, and it could be different from ***the Interval*** specified above if there is no data for the period.

Side-by-side report

This tool allows building a report with side-by-side sub-reports. Use it to run a comparative analysis on the same page. It's helpful for reviewing multiple parameters, totals and compare results at different time intervals. The ***Compare Period*** option is designed to create a report that shows two sub-reports side-by-side.

To enable this option, click on the plus icon next to the ***Period*** field and specify both intervals (***Period 1/Period 2***) for the report.

Screenshot: Profit Report query form

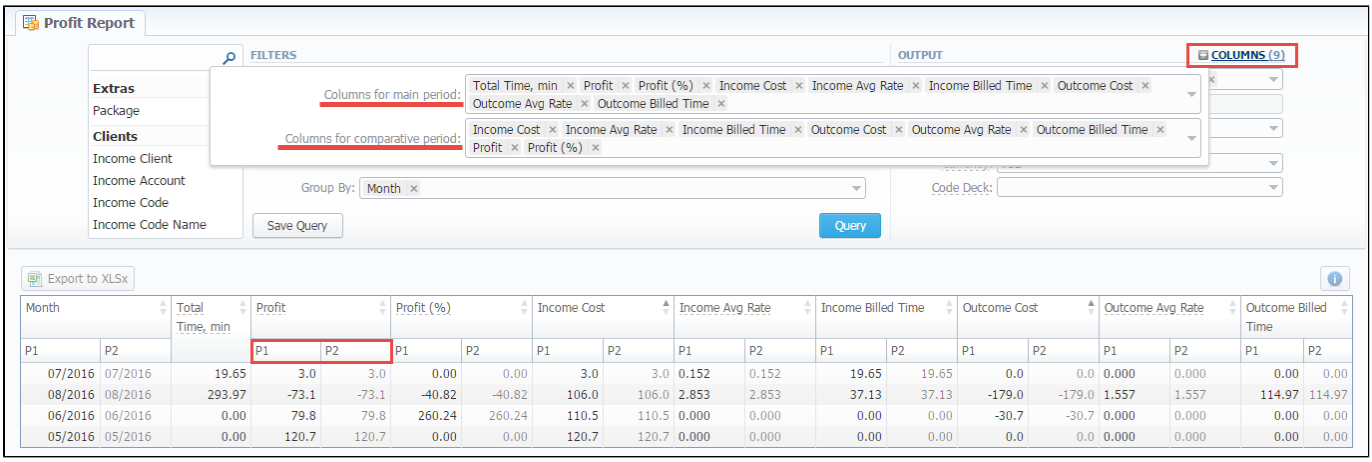


Then, choose columns for the main and comparative period in the report Output form. When all required parameters are specified, click the **Query** button.

To remove this filter, please click the delete icon.

You can modify a comparative mode by changing periods and columns. For example, to compare how different the profit of the two periods is, choose the ***Profit*** value from the Columns. Therefore, the final report splits ***Profit*** into separate columns *(see screenshot below).*

Screenshot: Profit Report query form



Month		Total Time, min	Profit		Profit (%)		Income Cost		Income Avg Rate		Income Billed Time		Outcome Cost		Outcome Avg Rate		Outcome Billed Time	
P1	P2		P1	P2	P1	P2	P1	P2	P1	P2	P1	P2	P1	P2	P1	P2	P1	P2
07/2016	07/2016	19.65	3.0	3.0	0.00	0.00	3.0	3.0	0.152	0.152	19.65	19.65	0.0	0.0	0.000	0.000	0.00	0.00
08/2016	08/2016	293.97	-73.1	-73.1	-40.82	-40.82	106.0	106.0	2.853	2.853	37.13	37.13	-179.0	-179.0	1.557	1.557	114.97	114.97
06/2016	06/2016	0.00	79.8	79.8	260.24	260.24	110.5	110.5	0.000	0.000	0.00	0.00	-30.7	-30.7	0.000	0.000	0.00	0.00
05/2016	05/2016	0.00	120.7	120.7	0.00	0.00	120.7	120.7	0.000	0.000	0.00	0.00	0.0	0.0	0.000	0.000	0.00	0.00