Customer Dynamics

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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	Select the required parameters for the report on the **Filters** menu. 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

	Title	Description
	Clients - Active	This subdivision shows statistical data of customers who 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	Statistic data is displayed related to the customers who 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 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.

You can also 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. It is also 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
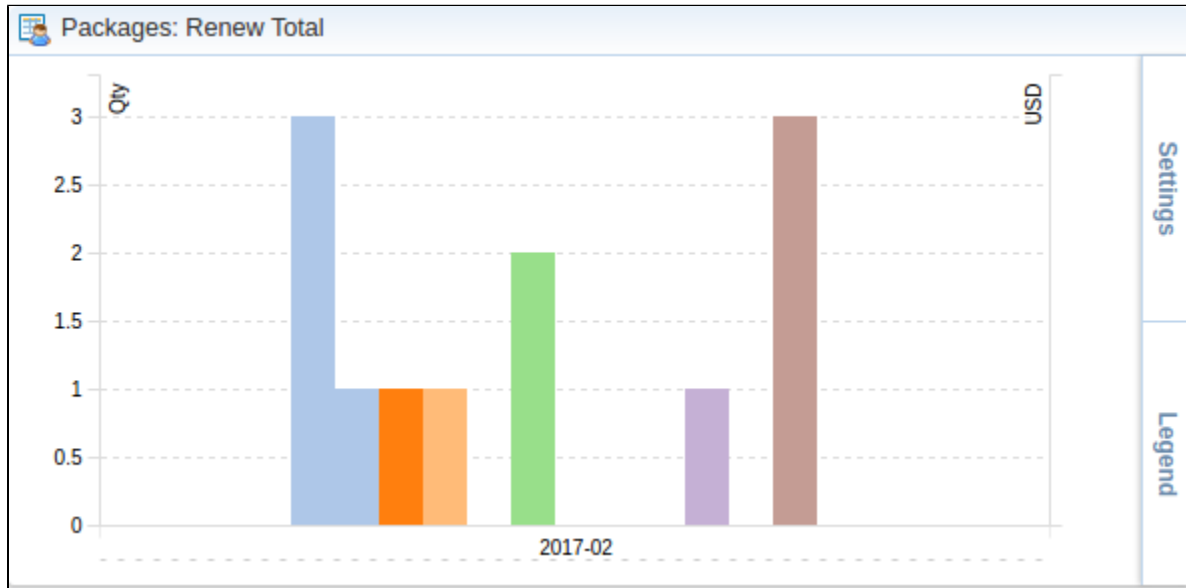
Sharing a Report

Each time you get a report output, the system generates a unique link in the format of "/view?id=<uniq-string>". It allows sharing data between the users, even if they belong to different resellers (the feature works similarly to Share by Link in Google Drive).

The link refers to the report data valid for a specific moment.

Example: When you send a link to a report, you ensure the recipient would see the same data as you do. If you change data in the system (for example, perform rerating), the previously copied link to the report will display data valid for the moment of generation (even though the actual data is now different).

You can also view the additional information about the generated report by hovering over the **Info** ⓘ icon, which is located under the **Output** section:

Title	Description
Data Period	States the period set for a report
Generated by	Indicates the **Role** of the user who generated a report and specifies a generation time

Screenshot: Customer Dynamics Info icon

OUTPUT

Type: Web

Currency: USD

Active Duration: 3 month(s)

06/202

Data Period: 06/01/2020 00:00:00 +0000 — 06/01/2020 00:00:00 +0000
Generated by: Administrator on 06/24/2020 10:29:33 +0000
Duration: 0.0159 sec

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