Profit Report

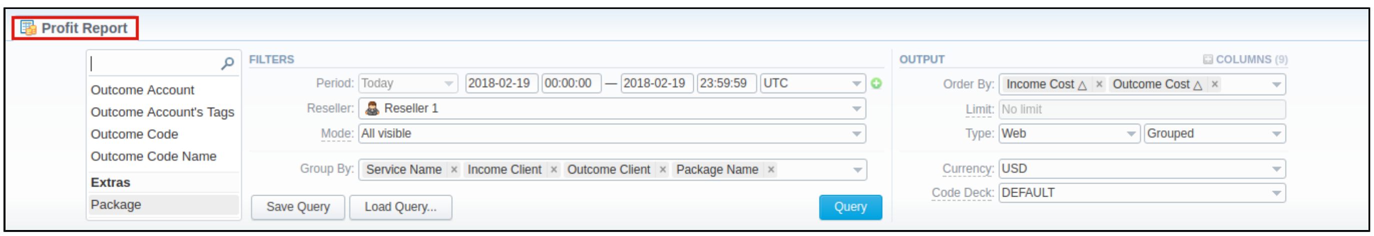
In this article

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***

<table>
<tr><td></td><td>
<table>
<tr><td>Group by</td><td>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, Term rate, Package name.
• Extras: Service Name, Income Series.

Attention

Please note that the Group by field is mandatory, it couldn't be left empty to generate the report.</td></tr>
<tr><td colspan="2">Additional Filters</td></tr>
<tr><td colspan="2">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, Service name.</td></tr>
<tr><td colspan="2"></td></tr>
<tr><td>Income Client</td><td>Specify an origination client(s) for the report</td></tr>
<tr><td>Income Client's Tag</td><td>Specify a tag(s) assigned to origination clients</td></tr>
<tr><td>Income Account</td><td>Determine an origination client's account(s)</td></tr>
<tr><td>Income Account's Tag</td><td>Indicate origination account's tags</td></tr>
<tr><td>Income Code</td><td>Define an incoming code</td></tr>
<tr><td>Income Code Name</td><td>Specify an incoming code name</td></tr>
<tr><td>Income Serial</td><td>Indicate a serial number of the originator's calling card</td></tr>
<tr><td>Income Reseller</td><td>Specify a target reseller(s) for the report</td></tr>
<tr><td>Outcome Client</td><td>Define a termination client(s)</td></tr>
<tr><td>Outcome Client's Tag</td><td>Define a termination client's tag(s)</td></tr>
<tr><td>Outcome Account</td><td>Indicate an account(s) of the termination client(s) for the report</td></tr>
<tr><td>Outcome Account's Tag</td><td>Specify termination account's tags if any</td></tr>
<tr><td>Outcome Code</td><td>Specify a termination code of the client</td></tr>
<tr><td>Outcome Code Name</td><td>Indicate a termination code name</td></tr>
<tr><td>Package</td><td>Determine the name of the used package</td></tr>
<tr><td>Service name</td><td>Specify the name of the service</td></tr>
</table>
</td></tr>
<tr><td>Output</td><td>This form contains settings of the report output data.

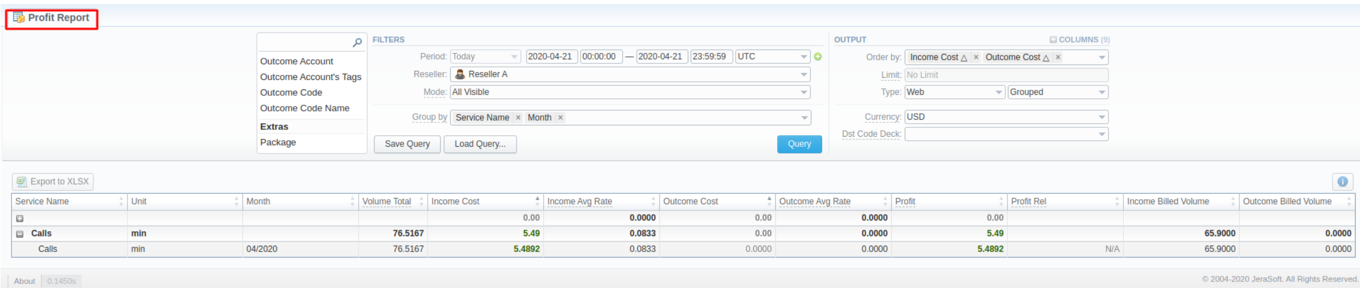
Click a plus sign next to Columns and select required columns to add them to the Output information block. Also, you can cancel any chosen item.</td></tr>
</table>

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 Volume, Outcome Cost, Outcome Avg Rate, Outcome Billed Volume, Profit, Profit rel.* **Columns for the comparative period:** *Volume Total, Income Cost, Income Avg Rate, Income Billed Volume, Outcome Cost, Outcome Avg Rate, Outcome Billed Volume, Profit, Profit rel, Profit (%), Profit rel (%), Income Cost (%), Outcome Cost (%), Income Avg Rate (%), Outcome Avg Rate (%).* 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 rel*** - 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** 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

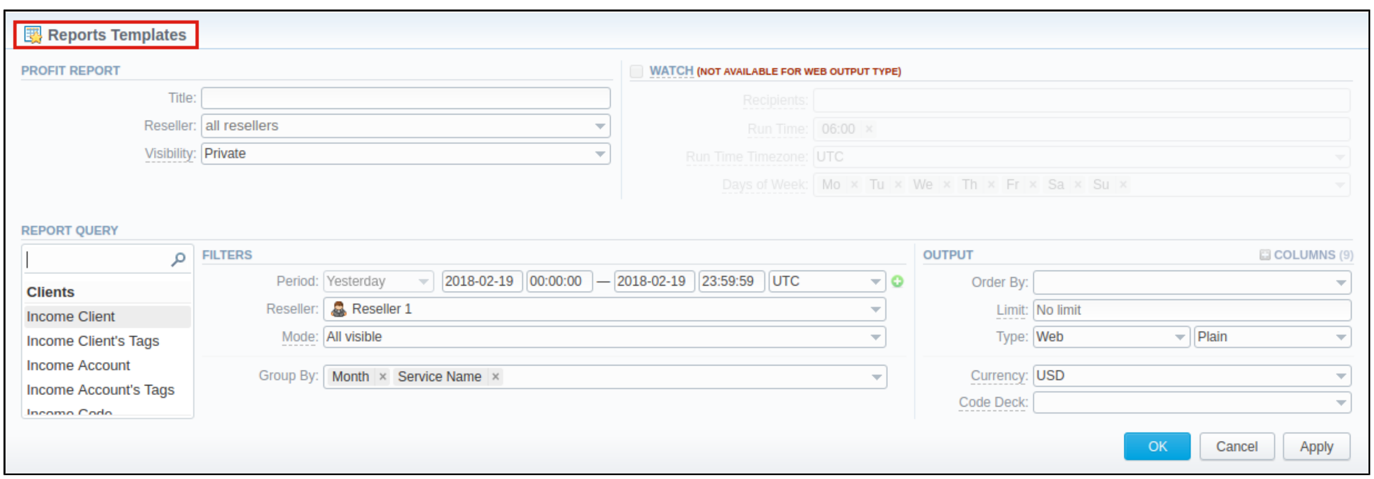
Please note that the system shows rounded values in the reports. However, while calculating the system takes an exact value. Hence, the procedure of the rounding is as follows:

- 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 that 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

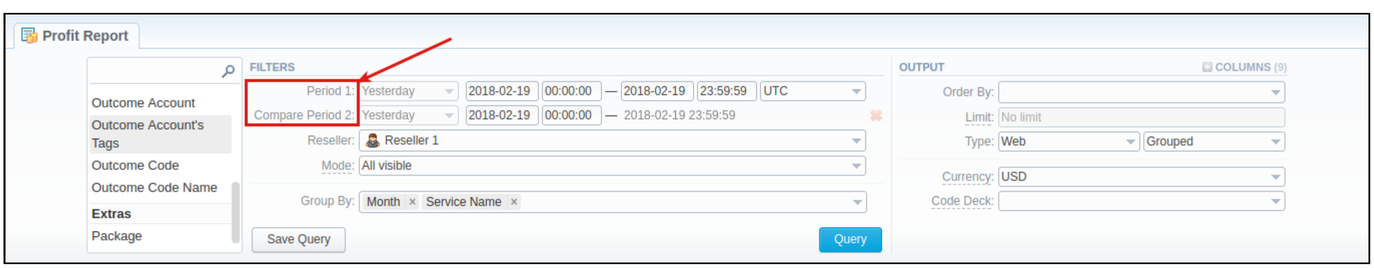
You can check an ***actual date interval*** of the report by clicking the **Info** icon, and it could be different from ***the Interval*** specified above if there is no data for the period.

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

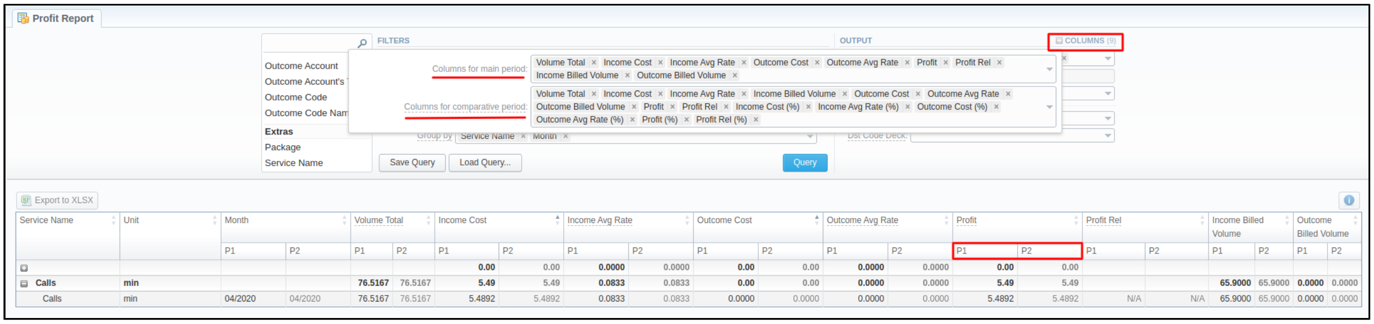


Then choose columns for the main and comparative period in the report Output form. When all the required parameters are specified, click the **Query** butto n.

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



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: Profit Report Info icon