

# Reports Templates

## Reports Templates List

This section allows you to view, execute and manage the already existing templates of **Routing Analysis**, **Profit Report**, **xDR's List**, **Mismatches Report**, **Orig-Term Report**, and **Summary Report**. Moreover, you can send reports to email to keep yourself informed about the traffic status without the need to login to the system and request reports. The section structure is as follows:

*Screenshot: Reports Templates section main window*

ID	Title	Report Query	Watch	Reseller
<b>Routing Analysis</b>				
4	calls 1201 rose_orig	Service: Calls Src Party ID: Dst Party ID: 1201 Verbose: All routes Group By: Type, Rank	Type: Web – Grouped	All resellers
2	did route	Service: Calls Dst Party ID: 1111 Account: rose_orig Group By: Type, Rank	Type: Web – Grouped	All resellers
<b>Balance Report</b>				
5	Balance Report	Period: This Month Mode: Accountant Client Type: Client Group By: Date	Type: CSV – Plain Currency: USD	test@gmail.com Mo 06:00 All resellers
<b>XDRs List</b>				
3	xdrs_needed_columns	Period: Today	Order By: ▾ Event time Type: Web – Plain	All resellers

Column	Description
<b>ID</b>	Template ID
<b>Title</b>	Name of the template
<b>Report Query</b>	Template details
<b>Watch</b>	Tool to run a report automatically at the exact time and send the results to the list of emails
<b>Reseller</b>	Name of the Reseller

The section contains the following functional icons:

Icon	Description
	Allows previewing a template
	Allows running a respective report by this template
	Indicates that <b>To send a report via email</b> watch option is enabled.
	Indicates that <b>To send a report via email</b> watch option is disabled.

To start managing, choose the respective template from the section and click on the name to open the settings.

## Creating a Report Template

All reports templates are created from the respective sections while generating reports. To add a new template, you need to:

1. open the target report section;
2. fill in a query form with respective parameters;
3. click the **Save Query** button;
4. in a pop-up window with template settings, fill in all required fields (screenshot and field description is provided down below);
5. click **Apply** to save a template.

*Screenshot: New Template form*

Reports Templates

**CDRS LIST**

Title:

Reseller:

Visibility:

**WATCH**

Recipients:

Run Time:

Days of Week:

**REPORT QUERY**

**CLIENTS**

- Client Type
- Client
- Account
- Tags

**FILTERS**

Period:  |  —  |

**OUTPUT**

Order By:

Type:  |

Currency:

Code Deck:

Information Block	Description								
<b>Report Name</b>	Here you can specify parameters for the template that will be used while running reports								
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<b>Watch</b>	<p>This tool allows generating reports at the appropriate time and sending results to specified emails.</p> <div style="background-color: #ffff00; padding: 5px; margin: 5px 0;"> <p><b>⚠ Attention</b></p> <p>Please note that this tool <b>is not available</b> for <b>Web</b> output type, only for <b>CSV/Excel XLS/Excel XLSx</b>.</p> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;"><b>Recipients</b></td> <td>Specify emails of recipients. Here you can indicate your own or other users' email, even those of 3rd parties.</td> </tr> <tr> <td><b>Run Time</b></td> <td>Determine an appropriate time to generate a report automatically, it could be several times, for example, <b>10:00, 12:00, 18:00</b></td> </tr> <tr> <td><b>Run Time Timezone</b></td> <td>Indicate a timezone for a selected report run time</td> </tr> <tr> <td><b>Days of Week</b></td> <td>Define days of a week to generate a report automatically. For example, you can run a report only on Monday or each day of the week.</td> </tr> </table>	<b>Recipients</b>	Specify emails of recipients. Here you can indicate your own or other users' email, even those of 3rd parties.	<b>Run Time</b>	Determine an appropriate time to generate a report automatically, it could be several times, for example, <b>10:00, 12:00, 18:00</b>	<b>Run Time Timezone</b>	Indicate a timezone for a selected report run time	<b>Days of Week</b>	Define days of a week to generate a report automatically. For example, you can run a report only on Monday or each day of the week.
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<b>Report Query</b>	Here you need to specify filters that will be used for generating a correct report and choose the output type to view the report								

**⚠ Warning**

- If you create the report template and the **Watch** option is enabled, the client will receive the file with a report even when there are no statistics for a specified period.
- Please be aware that the templates previously existing in the **Reports to email** section could not be restored automatically. Note that you can recreate them if needed.