Invoicing Report

Section overview Creating a New Invoicing Report Invoicing Report buttons: export, chart. Sharing a Report

Section overview

This section allows a user to build a report, based on information from the issued invoices with a possibility to export data (.xls, .xlsx, and .csv). Since the I nvoicing Report generates statistics according to invoices, if you delete an invoice, the data will be no longer present in the report. The report shows data according to the variables determined in the Invoices Template section.

Screenshot: Invoicing Report section



Creating a New Invoicing Report

To create a new invoicing report, fill in the following query form:

Information Block	Field and 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 <i>Period</i> field is mandatory.	
	Owner	Define a reseller for the report	
	Invoice Type	Select the type of invoice from the drop-down list:	
		outgoingincoming	
	Additional Filters		
	The accessible additional filters are: • Clients: Client, Client Type. • Extras: Invoice, Payment Account		
	Client Type	Choose a respective parameter for statistics data: • Client • Reseller • Calling Card • Call Shop	
	Client	Define a client for the report	
	Invoice	Specify the name/number of a target invoice	

Payment Select from the drop-down list of predefined system payment accounts: Account Services Products Fees • Extra Charges Outgoing Extra Charges Incoming SureTax Calling Cards Fees Accounts Receivable Accounts Payable General and all manually created accounts from the $\mbox{\bf Payment}$ $\mbox{\bf Accounts}$ section Output This form contains settings of the report output data Click a plus 🖾 icon next to *Columns* and select the required columns to add them to the Output information block. Also, you can cancel any chosen item. Accessible columns in the report Client Name of a client Date The date when an invoice was generated Payment Type of a payment account: Account services packages Number of an invoice, used in the report Invoice Number Service Type of services Description Details specified in invoice templates, for example, the number of services, country code, code name, package name, etc. Volume of the service, for example, the duration of the event Volume Unit Unit that was used for rates and packages limits Rate Price per 1 rating unit that was used Total price of used services/products Cost Financial charge for services/products used in an invoice Tax Currency used in invoices Currency Period Start Start period of an invoice Period Finish End period of an invoice ΤZ Timezone of invoices Other output settings 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.

This feature is available only for CSV/Excel XLS/Excel XLSx formats of the report, it doesn't work with Web.

Specify an output currency for the report. All values will be automatically converted to the specified currency in

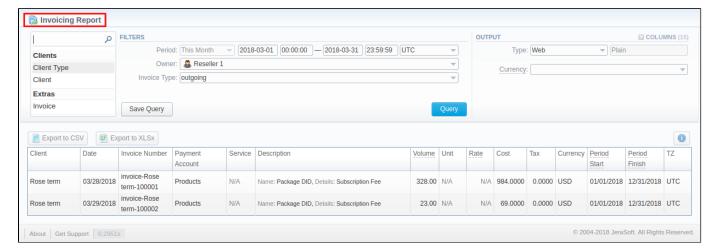
After selecting all needed parameters, click the Query button and the system will generate a report:

the report

Attention

Screenshot: Invoicing Report

Currency



Moreover, you can create a template for reports and save specified parameters by clicking the **Save Query** button. Then, fill in the required fields in a popup window with settings, and confirm template creation.



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

Invoicing Report buttons: export, chart.

You can export data to a CSV or XLSx file, which contains only currently displayed data, with no automatic request to update data while exporting.

- 1. To download a report in .csv, click the Export to CSV button above the report.
- 2. To download a .xlsx file, click the Export to XLSx button above the report.
- 3. You can check an actual date interval by clicking the **Info** icon. The displayed data could be different from the Interval specified above if there is no data for the period.

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 vicon, 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