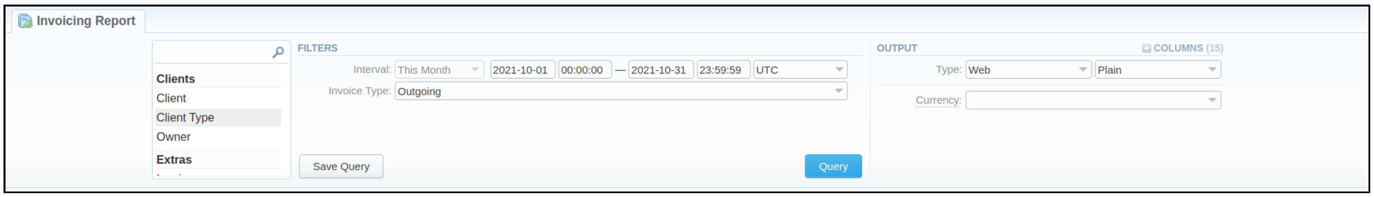
Invoicing Report

In this article

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

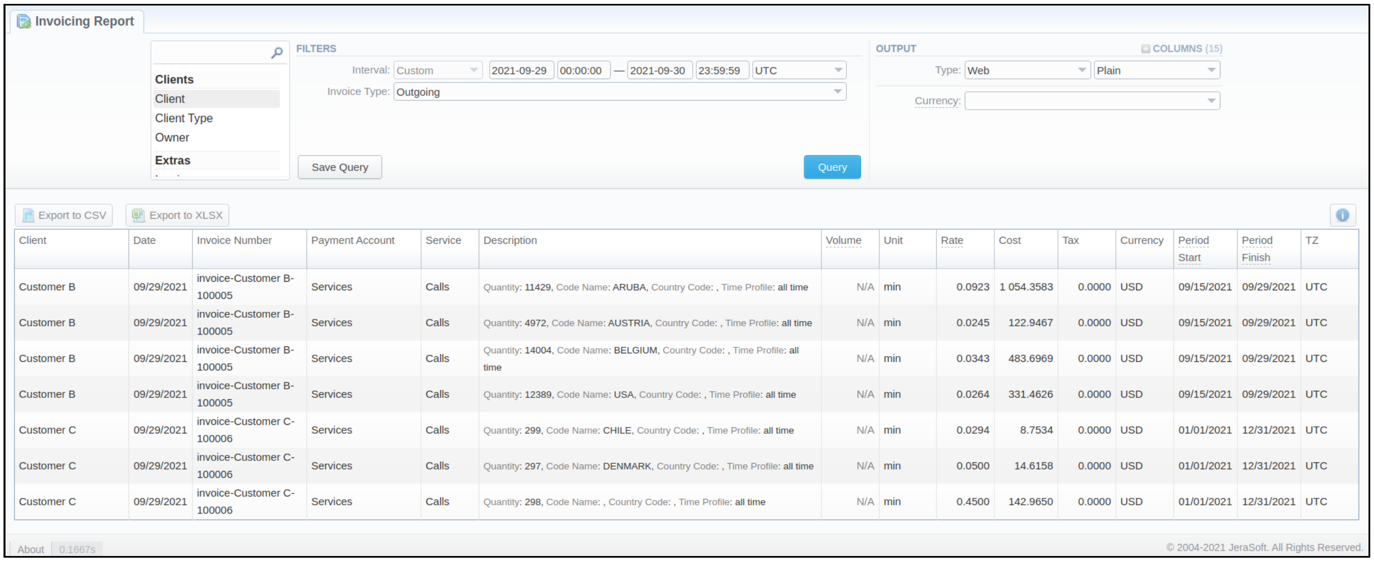
To create a new invoicing report, fill in the following query form:

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.	
	Interval	Specify the time interval for the report and a timezone. Please note that the ***Interval*** field is mandatory.
	Owner	Define a reseller for the report
	Invoice Type	Select the type of invoice from the drop-down list: • ***outgoing*** • ***incoming***
	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 Account	Select from the drop-down list of predefined system payment accounts: • ***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 **Payment 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 Account	Type of a payment account: • ***services*** • ***packages***
	Invoice Number	Number of an invoice, used in the report
	Service	Type of services
	Description	Details specified in invoice templates, for example, the number of services, country code, code name, package name, etc.
	Volume	Volume of the service, for example, the duration of the event
	Unit	Unit that was used for rates and packages limits
	Rate	Price per 1 rating unit that was used
	Cost	Total price of used services/products
	Tax	Financial charge for services/products used in an invoice
	Currency	Currency used in invoices
	Period Start	Start period of an invoice
	Period Finish	End period of an invoice
	TZ	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. **Attention** This feature is available only for **CSV/Excel XLS/Excel XLSx** formats of the report, it doesn't work with **Web**.
	Currency	Specify an output currency for the report. All values will be automatically converted to the specified currency in the report

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

Screenshot: Invoicing Report



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 pop-up window with settings, and confirm template creation.

Tip

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** icon, which is located under the **Output** section:

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