

# Reports - Customer Analysis Report Updates (15416)

Last Modified on 07/14/2023 10:55 am EDT

A change has been made to rename the Account Analysis Report to Customer Analysis. In addition, the account/site name is a hyperlink to the site/account when clicked on.

The screenshot displays the 'CUSTOMER ANALYSIS' report interface. At the top, the 'TYPE' is set to 'Earned Revenue'. The report is filtered by 'YEAR 2023', 'DIVISION CORPUS, DAYTON, H', 'SERVICE REGION All', 'LOB All', and 'ACCOUNT CLASS All'. A 'LOAD' button and a search bar are also visible.

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
.	465.00	-675.81	0.00	5.00	10.49	-1,628.38	0.00	0.00	0.00	0.00	0.00	0.00	-1823.70
1686286-TEST	0.00	99.90	0.00	0.00	0.00	2.55	7.50	0.00	0.00	0.00	0.00	0.00	109.95
1686286-ROBERT JOHN	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Below the table, account details for '18535 EDITH & ROBERT LEE DELOME' are shown, including address (777 HOLLYWOOD LANE 7777, DAYTON, TX 77535-4468), account manager (House Acct non System), and class (RESIDENTIAL). A 'Billed Thru Date Jul 12, 2023' is noted. A summary table shows current balances: CURRENT -50.00, 1-30 0.00, 31-60 0.00, 61-90 0.00, 91-120 0.00, 120+ 0.00, and TOTAL -50.00.

The 'ACTIVE SERVICES' section shows a total recurring amount of \$31.47 for 'Monthly Trash Svc - 96 Gallon Cart' (SERVICE ID 5F13, FREQUENCY 2x per week, SCHEDULE M,H, RATE \$31.47 per month, START DATE 06/01/23).

The 'CALENDAR' view for July 2023 shows service events on the following dates:

- Jun 25: 1, RS\_SERVICE, 96GAL-MSW, MS
- Jun 26: 1, RS\_SERVICE, 96GAL-MSW, MS
- Jun 28: 1, RS\_SERVICE, 96GAL-MSW, MS
- Jun 29: 1, RS\_SERVICE, 96GAL-MSW, MS
- Jul 2: 1, RS\_SERVICE, 96GAL-MSW, MS
- Jul 3: 1, RS\_SERVICE, 96GAL-MSW, MS
- Jul 5: 1, RS\_SERVICE, 96GAL-MSW, MS
- Jul 6: 1, RS\_SERVICE, 96GAL-MSW, MS

Pathway: Reports > Analysis > Customer Analysis