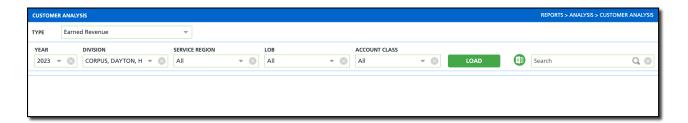# Customer Analysis

Last Modified on 10/23/2023 3:45 pm EDT

Pathway: *Reports > Analysis > Customer Analysis*

The Customer Analysis report provides two report options: Earned Revenue and Revenue. These reports provide a breakdown of revenue associated with the accounts that meet the criteria defined by the applied filters.

Permissions

Permission ID	Permission Name
134	Reports Main Menu
348	AR Analysis Reports

Parameters

Parameter	Description
Type	Report Type options include: • Earned Revenue - Identified as revenue that has been received. • Revenue - Identified as current and forecasted revenue.
Year	Restricts the report to only generate revenue data for the selected year.
Division	Restricts the report to only generate revenue data for the selected division(s).
Service Region	Restricts the report to only generate revenue data for the selected service region(s).
LOB	Restricts the report to only generate revenue data for the select lines of business.
Account Class	Restricts the report to only generate revenue data for the selected account class(es).

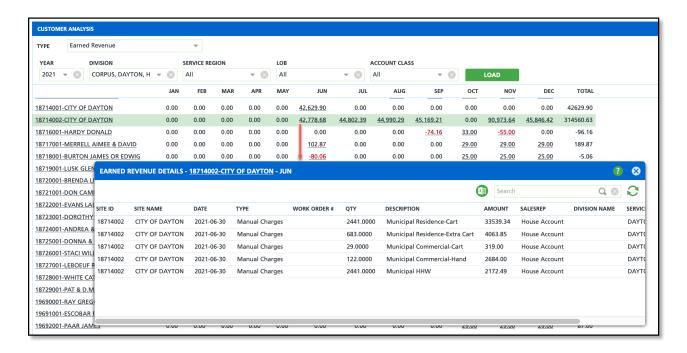# Run a Report

1. Select the **Type** of report you would like to run.
2. Select the **Year** the report should generate revenue data for.
3. Select from the optional filters:
   - Division
   - Service Region
   - LOB
   - Account Class
4. Select **Load** and the report's results will be returned on the screen.
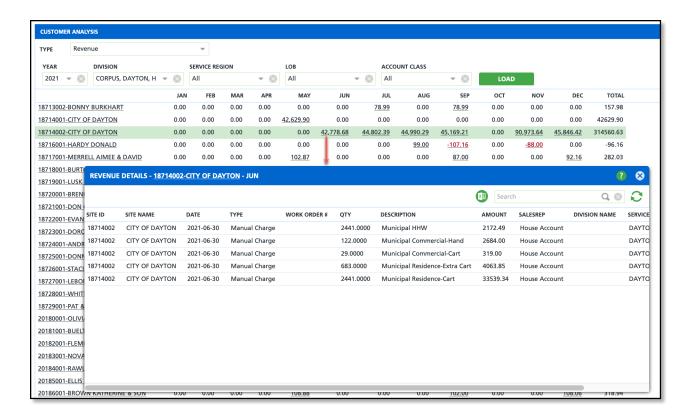
Report Types

Type: Earned Revenue

The Earned Revenue report offers a detailed breakdown of each account and the revenue it generated from completed services. Select a revenue value to open the Earned Revenue Details screen.

Column	Description
Account	Displays the account name and account number the revenue is associated with.
Jan - Dec	Displays the monthly revenue for the account. Select the value to view a detailed breakdown.
Total	Displays a total revenue amount from January through December for an account.

Type: Revenue

The Revenue report shows all current and forecasted revenue amounts for each account. Select a revenue value to open the Revenue Details screen.

Column	Description
Account	Displays the account name and account number the revenue is associated with.
Jan - Dec	Displays the monthly revenue for the account. Select the value to view a detailed breakdown.
Total	Displays a total revenue amount from January through December for an account.