

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.

The screenshot shows a web interface for the 'CUSTOMER ANALYSIS' report. At the top, there's a blue header with the title and breadcrumb 'REPORTS > ANALYSIS > CUSTOMER ANALYSIS'. Below the header, there's a form with several dropdown menus: 'TYPE' (set to 'Earned Revenue'), 'YEAR' (set to '2023'), 'DIVISION' (set to 'CORPUS, DAYTON, H'), 'SERVICE REGION' (set to 'All'), 'LOB' (set to 'All'), and 'ACCOUNT CLASS' (set to 'All'). To the right of these filters is a green 'LOAD' button and a search bar with a magnifying glass icon.

Permissions

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

Parameters

Parameter	Description
Type	Report Type options include: <ul style="list-style-type: none">• 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.

CUSTOMER ANALYSIS

TYPE: Earned Revenue

YEAR: 2021 | DIVISION: CORPUS, DAYTON, H | SERVICE REGION: All | LOB: All | ACCOUNT CLASS: All | **LOAD**

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
18714001-CITY OF DAYTON	0.00	0.00	0.00	0.00	0.00	42,629.90	0.00	0.00	0.00	0.00	0.00	0.00	42629.90
18714002-CITY OF DAYTON	0.00	0.00	0.00	0.00	0.00	42,778.68	44,802.39	44,990.29	45,169.21	0.00	90,973.64	45,846.42	314560.63
18716001-HARDY DONALD	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-74.16	33.00	-55.00	0.00	-96.16
18717001-MERRELL AIMEE & DAVID	0.00	0.00	0.00	0.00	0.00	102.87	0.00	0.00	0.00	29.00	29.00	29.00	189.87
18718001-BURTON JAMES OR EDWIG	0.00	0.00	0.00	0.00	0.00	-80.06	0.00	0.00	0.00	25.00	25.00	25.00	-5.06

EARNED REVENUE DETAILS - 18714002-CITY OF DAYTON - JUN

SITE ID	SITE NAME	DATE	TYPE	WORK ORDER #	QTY	DESCRIPTION	AMOUNT	SALESREP	DIVISION NAME	SERVIC
18723001-DOROTHY	18714002	CITY OF DAYTON	2021-06-30	Manual Charges	2441.0000	Municipal Residence-Cart	33539.34	House Account	DAYTO	
18724001-ANDREA &	18714002	CITY OF DAYTON	2021-06-30	Manual Charges	683.0000	Municipal Residence-Extra Cart	4063.85	House Account	DAYTO	
18725001-DONNA &	18714002	CITY OF DAYTON	2021-06-30	Manual Charges	29.0000	Municipal Commercial-Cart	319.00	House Account	DAYTO	
18726001-STACI WILL	18714002	CITY OF DAYTON	2021-06-30	Manual Charges	122.0000	Municipal Commercial-Hand	2684.00	House Account	DAYTO	
18727001-LEBOEUF R	18714002	CITY OF DAYTON	2021-06-30	Manual Charges	2441.0000	Municipal HHW	2172.49	House Account	DAYTO	

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.

CUSTOMER ANALYSIS														
TYPE	Revenue													
YEAR	2021	DIVISION	CORPUS, DAYTON, H	SERVICE REGION	All	LOB	All	ACCOUNT CLASS	All	LOAD				
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	
18713002-BONNY BURKHART	0.00	0.00	0.00	0.00	0.00	0.00	78.99	0.00	78.99	0.00	0.00	0.00	157.98	
18714001-CITY OF DAYTON	0.00	0.00	0.00	0.00	42,629.90	0.00	0.00	0.00	0.00	0.00	0.00	0.00	42629.90	
18714002-CITY OF DAYTON	0.00	0.00	0.00	0.00	0.00	42,778.68	44,802.39	44,990.29	45,169.21	0.00	90,973.64	45,846.42	314560.63	
18716001-HARDY DONALD	0.00	0.00	0.00	0.00	0.00	0.00	0.00	99.00	-107.16	0.00	-88.00	0.00	-96.16	
18717001-MERRELL AIMEE & DAVID	0.00	0.00	0.00	0.00	102.87	0.00	0.00	0.00	87.00	0.00	0.00	92.16	282.03	

REVENUE DETAILS - 18714002-CITY OF DAYTON - JUN											
SITE ID	SITE NAME	DATE	TYPE	WORK ORDER #	QTY	DESCRIPTION	AMOUNT	SALESREP	DIVISION NAME	SERVICE	
18714002	CITY OF DAYTON	2021-06-30	Manual Charge		2441.0000	Municipal HHW	2172.49	House Account	DAYTO		
18723001-DORC	18714002	2021-06-30	Manual Charge		122.0000	Municipal Commercial-Hand	2684.00	House Account	DAYTO		
18724001-ANDR	18714002	2021-06-30	Manual Charge		29.0000	Municipal Commercial-Cart	319.00	House Account	DAYTO		
18725001-DONN	18714002	2021-06-30	Manual Charge		683.0000	Municipal Residence-Extra Cart	4063.85	House Account	DAYTO		
18726001-STAC	18714002	2021-06-30	Manual Charge		2441.0000	Municipal Residence-Cart	33539.34	House Account	DAYTO		

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.