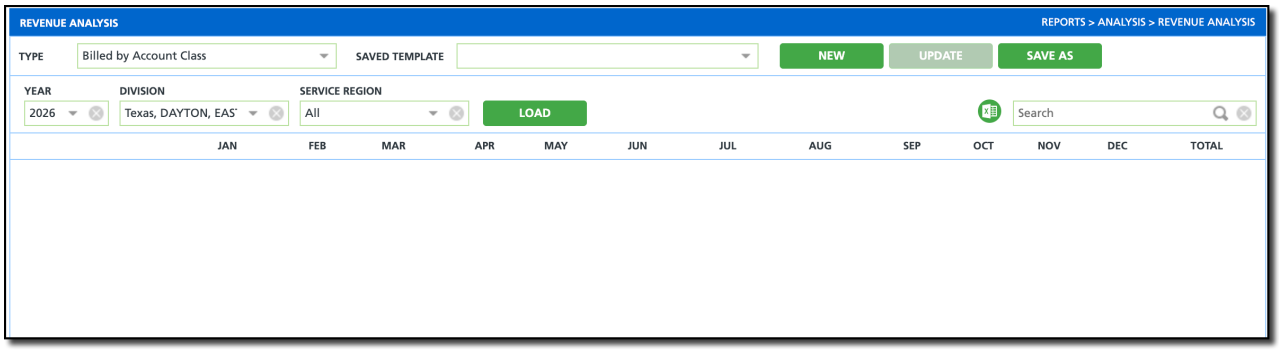
Revenue Analysis

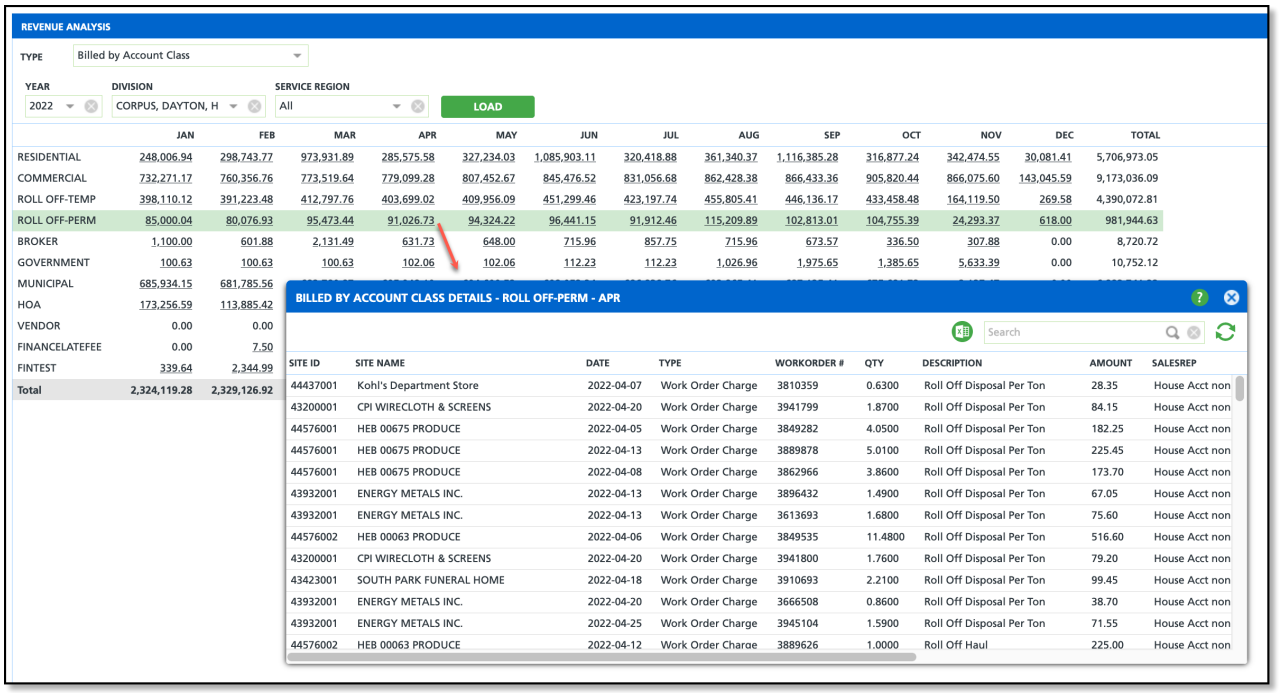
Last Modified on 09/28/2026 4:25 pm PDT

Pathway: *Report > Analysis > Revenue Analysis*

The *Revenue Analysis Report* offers a detailed breakdown of billed revenue based on the selected report Type. This provides users with the flexibility to analyze and interpret both monthly and total revenue data from various perspectives.

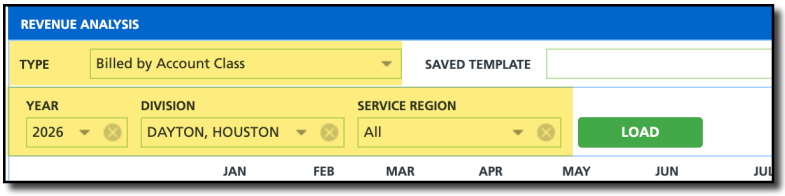


Example Report



Report Parameters

Parameters are the specific criteria required to run a report, ensuring the system pulls only the specific data you need for your analysis.



Parameter	Description
Type	Identifies the report that billed revenue data will be loaded for.
Year	Specifies the year the report should generate billed revenue data on.
Division	Restricts the report to only display billed revenue data for the selected division.
Service Region	Restricts the report to only display billed revenue data for the selected service region.

Run The Report

Follow these simple steps to run the report.

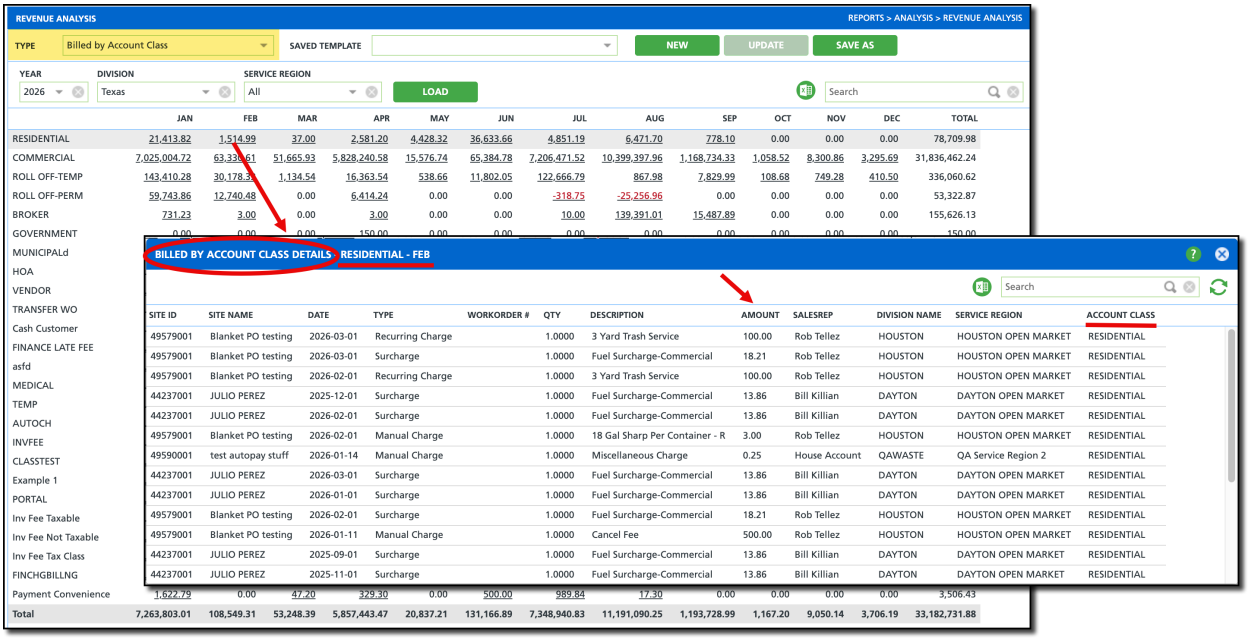
1. Select the **Type** of report to run.
2. Select the **Year** to extract only the data for the specific year selected.
3. Optional filters to apply:
    - **Division**
    - **Service Region**
4. Select the **Load** button to generate the report.
5. To view the data in excel, select the excel export button.
6. Create a **Saved Template** for faster use later.
    - After all parameters are set, click on the **Save As** button at the top of the screen.
    - Enter a **Name** for the template and click **Save**.
    - The option to make the template available to other users is provided by checking the **Public Access** check box. Otherwise, if left unchecked, the report is only available to the user account it was created under.

Understand The Reports

There are several types of Revenue Analysis reports that can be generated from this one report screen. Below are sample reports of each including a brief description and breakdown of the report.

Type: Billed By reports (10)

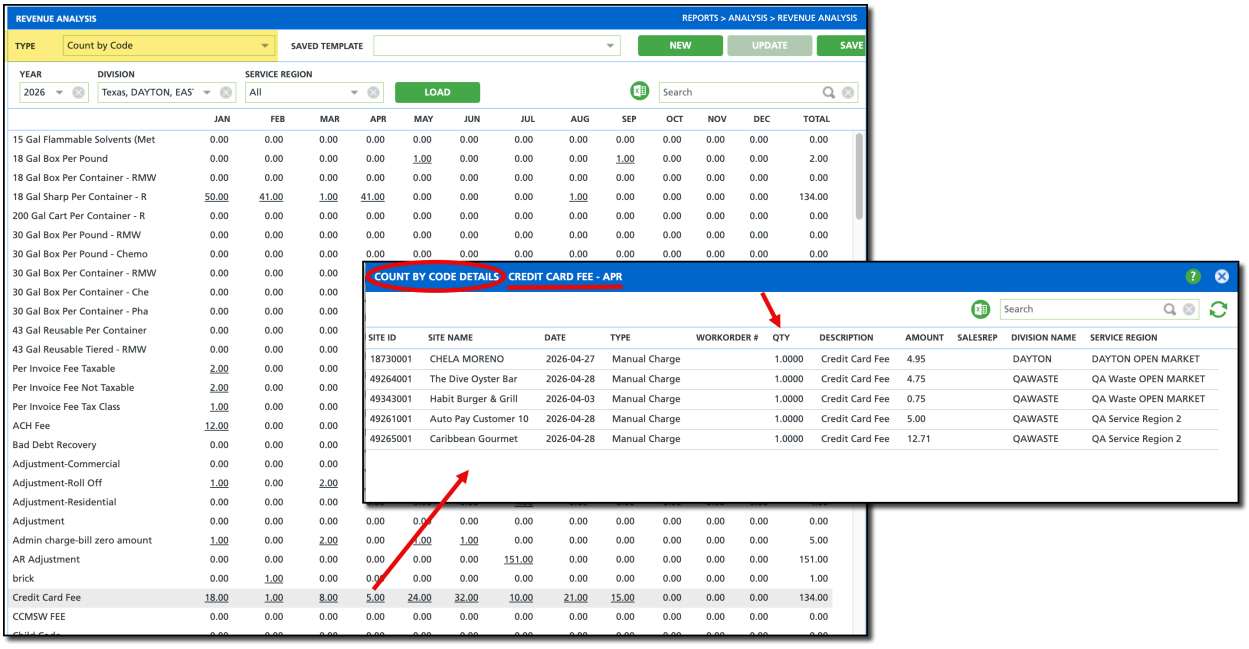
The "Billed by" report types contain the billed total revenue by either the **Account Class**, **Bill Group**, **Code**, **Division**, **LOB**, **Salesrep**, **Service Region**, **Source**, **State**, or **Surcharge** depending on the report selected; for the selected Year, Division and Service Regions. Click on a hyperlink value to open the *Billed by Details* screen.



Column	Description
Jan - Dec	Displays the monthly billed revenue totals for each item.
Total **Displayed at Bottom*	Displays the sum of billed monthly revenue amounts for **all** items for each month.
Total **Column*	Displays the annual billed revenue total for each item.

Type: Count By reports (3)

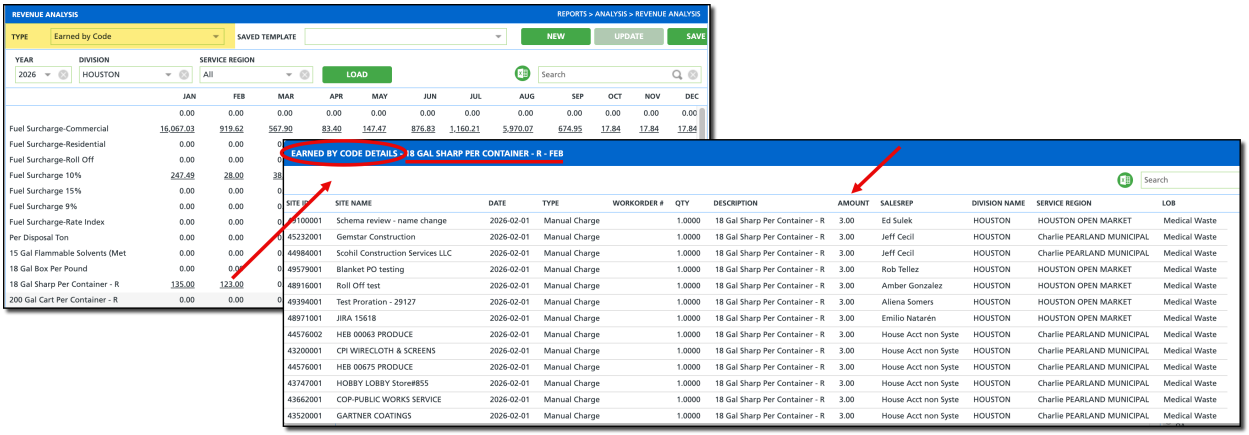
The "Count by" report types contain the total number of billable work orders by either the **Code** (charge code), **Material**, or **Salesrep** depending on the report selected; for the selected Year, Division and Service Regions. Click on a hyperlink value to open the *Count by Details* screen.



Column	Description
Jan - Dec	Displays the total number of a billable "item" for a given month.
Total **Displayed at Bottom*	Displays the total number of **all** billed items for a given month.
Total **Column*	Displays the total number of billed items for a given item across the whole year.

Type: Earned By reports (4)

The "Earned by" report types contain the total amount earned by either the **Code** (charge code), **Division**, **LOB**, or **Service Region** depending on the report selected; for the selected Year, Division and Service Regions. Click on a hyperlink value to open the *Earned By Details* screen.



Column	Description
Jan - Dec	Displays monthly earned amount for each item listed.
Total **Displayed at Bottom*	Displays the sum of earned amounts for all items listed for the month.
Total **Column*	Displays the earned amount for each item for the whole year.

Type: Disposal to Revenue % report (1)

[Future implementation]

Type: Work Date by LOB (1)

[Future implementation]

Permissions

Permission ID	Permission Name
134	Report Main Menu
286	Revenue Analysis Reports