

Understanding the Invoice / Renewal calendar

The Invoice/Renewal Calendar is a report that is meant to give the user a bird's eye view of expected income both in past months and projecting into the future. The page itself is presented as a calendar view with three key statistics being listed for each day: Invoices, Renewals and Starts. The user can select any month from the past or future to view. When viewing a day or month in the past, the statistics are calculated based on records in the global event log. For days or months in the future, the stats are projected values based on the current state of client's accounts and services in the Client Manager. This report is brand specific. The statistics displayed are only representative of the current brand the user is in.

At the top of the page, there are two boxes that offer summaries of the numbers for the displayed month. The first summary box on the left side of the page breaks down the total renewals either having occurred in or scheduled to occur for that month into their respective periods. The number under the 'Services' heading lists the number of services that are going to renew in the month for each period. The value under 'Amount' is the total value of those renewals in each period. Grand totals for both are displayed at the bottom. The second summary box lists two key stats. The first is the total number of invoices either generated or scheduled to be generated in the month. The second is the total value in new services having started or scheduled to start in the month.

As mentioned, broken into individual days in the calendar view are the totals for the three statistics, Invoices, Renewals and Starts.

Invoices

The number shown next to the invoices heading is the total number of clients that either were invoiced on that day if it is some time in the past or the number of clients scheduled to be invoiced if it is in the future. This number does not necessarily reflect the number of invoices that were paid or that had an amount due on that day. An invoice generated that comes to a \$0 balance will still be counted in this number. If the current brand is configured to use 'daily' invoicing as opposed to 'monthly' the value next to the invoices heading for days in the future will be 'All'. This indicates that all clients are to be invoiced on that day as that is what daily invoicing does.

Renewals

The number shown next to the renewals heading is the total value in service renewals that either occurred on the day or is projected to happen on that day if it is in the future. Totals for dates in the past are taken from the total service renewal events that were recorded in the event log on that day. Future projections are based on the services currently active in the client manager. Their current next renewal date and renewal periods are taken into account to estimate all future renewal dates. This report does not attempt to project future sales or increased growth.

Like the number of invoices in a given day, the total value in renewals is not necessarily the amount that was billed and/or paid by clients on that day. Service renewals happen independently of invoices being generated or paid so it is possible that either of those events took place before or after the actual renewal or not at all.

Starts

The number shown next to the starts heading is the total value in new services that either started on that day or are scheduled to start on that day in the future. Totals for dates in the past are taken from the total service start events that were recorded in the event log on that day. Because each service has only a single start date, it is not necessary to try and project numbers for the future. If a service is set to start on a particular day in the future, it will only be counted in the total for that specific day.

Each of the values displayed on a given day is a link to a more detailed breakdown of those items. Clicking the number of invoices will take the user to a page displaying the list of clients that were or are to be invoiced on that day. If viewing the breakdown for a day in the past, the total amount of the original invoice as well as any balance still outstanding for each invoice is displayed along with the client's account name and id number. At the top of the page a summary box displays the total number of clients invoiced on that day.

Clicking the total renewals for a given day will list those services that were or are projected to renew on that day. For each service listed the client's account name and id number are displayed as well as the service id, description, plan and renewal period. In addition, each service's most recent renewal as well as their next scheduled renewal is listed along with the amount of the renewal from that day. At the top of the page a summary box displays the total number of renewals and the total value of all renewals for the day.

Clicking the total starts for a given day will list those services that started or are scheduled to start on that day. For each service listed, the client's account name and id number is displayed along with the description, plan and initial value. At the top of the page a summary box displays the total number of service starts and the total value of all starts for the day.

Links at the bottom of each of these pages will take the user to any of the other summaries for the selected day. At the top right corner of the page, the user can select a different date to view the specified list for.