

Using Client Reports

What client reports are available in Ubersmith?

In *Reports & Stats*, *Client Manager* the following report types are available:

Invoice Print Queue

This report shows all invoices marked as 'queued'. You can generate .pdf files of one or more invoices, which changes the status of those invoices to 'printed'.

Invoice/Renewal Calendar

This report shows a calendar breakdown of number of invoices issued and amounts invoiced for both service starts and renewals. Values for future dates are based on expected service renewals and scheduled invoices.

Charge Queue Manager

This report shows all queued credit card charges. Charges are queued for one of two reasons:

- a previous attempt failed.
- a charge was scheduled for a later date.

Renewal Queue Manager

This report shows the list of services that are eligible for renewal. Renewals happen automatically, so this list is empty unless a given service failed to renew for one reason or another. The most common cause of a service not renewing is a service module function failing at renewal time.

Charge Log

This report shows the list of all charge attempts made during a specified time period. You can view either successful or declined charges, and filter by card type.

Charge History

This report shows a calendar breakdown of accepted and declined charge attempts.

Expired Credit Cards

This report lists credit cards according to their expiration status:

- Expired Credit Cards
- Unexpired Credit Cards
- Credit Cards Expiring Soon (within the next four months)
- Credit Cards Expired as of a selected date

Payments Received

This report lists and totals payments received, filtered by date and type. You can view the payment list for any date range to show which service items were paid over that period.

This report includes any payments directly received as well as account credits from actual payments (check, cash, wire transfer etc). It does not include account credits that do not represent actual money received, such as refunds.

Taxes Collected

This report lists and totals payments applied to taxes on invoices, filtered by date and type.

Taxes Refunded

This report lists and totals any tax line items that had a refund applied to them, filtered by the specified date range.

Taxes Invoiced

This report lists and totals any tax line items that have been invoiced, paid or not, filtered by the specified date range.

Tax Exemptions

This report lists all tax exemptions, filtered by exemption status (Pending Approval, Active, Deactivated). You can change the status of any exemption shown.

Refunds

This report lists and totals any refunds issued. It is limited to those refunds that represent the reversal of an actual payment received from the client, or deactivation of applied credits that represent actual money received (check, cash, wire transfer etc).

You can view the refund list for any date range to show which service items were refunded over that period.

Service Status

This report lists all the service status changes (Active, Pending, Suspended, Canceled, Deactivated), filtered by date range. This data is taken from the event log and does not necessarily reflect the current status of a given service.

Service Plans

This report lists the number of active services for each service plan, with the total dollar value in payments that have been received for each.

Service Cancellations

This report lists the services that are currently set to Canceled, filtered by date range and service plan, with the total dollar value of each.

Normalized Recurring Revenue

This report shows a calendar-based breakdown of the normalized dollar value of service renewals. The normalized value is the total value of the service renewal, divided by the number of months in the renewal period.

Outstanding Services

This report lists the service line items that currently appear in outstanding invoices, including the auto-suspend and auto-cancel dates for each line item.

Sent Invoices

This report lists and totals all invoices (paid or unpaid), filtered by date range. You can view the invoices list for any date range to show which service items were invoiced over that period.

Revenue by Location

This report shows the total dollar value for all services tied to a specific facility, as defined in the device manager. The values can be filtered by services invoiced, or services with payments applied.

Top Customers

This report ranks active clients, filtered by specific metrics (Services Invoiced, Payments Received, Number of Late Payments, Number of Services, and Client Since) and date range.

Credits Issued

This report lists and totals account credits started during the specified date range. The "Company Issued" column represents account credits that do not represent actual money being received from the client, such as refunds. The "Payments Received" and "Payment Gateway" columns represent account credits for actual payments received (check, cash, wire transfer etc).