Generating Reports

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About Reports

Reports can contain information on just about anything. Blesta includes a few helpful reports by default. You can access these under **[Billing] > [Reports]**.

Default Reports

Name	Description	Formats	Since Version
Aging Invoices	Unpaid invoices over the last 30, 60, and 90+ days.	CSV, JSON	
Client Data Portability	All non-sensitive information pertaining to a client.	JSON	4.3
Custom Report	One of the various custom reports added to the system.	CSV, JSON	
Invoice Creation	Invoices based on the date they were generated.	CSV, JSON	
Tax Liability	Taxes collected.	CSV, JSON	
Transactions Applied	Payments applied to invoices.	CSV, JSON	
Transactions Received	Payments received.	CSV, JSON	
Package Revenue	Calculates revenue from a currency for each package by totaling the paid invoice line items associated with the package.	CSV, JSON	4.9

Custom Reports

Blesta includes some really helpful default reports, but some organizations require detailed custom reports. Custom reports can be created under **[Billing] > [Reports] > [Customize]**, and allow you to specify any number of fields you wish to collect from a user that generates the custom report.

Adding a Custom Report

To add a custom report, click the **Add Report** button under **[Billing] > [Reports] > [Customize]**.

Option	Description
Name	The name of your custom report.
Query	The SQL query to be executed when your report is requested. Fields can be used within a query using the colon syntax. For example: ``SELECT `id` FROM `users` WHERE `username`=:username;`` Where a field exists with the name **username**.

<table>
<tr><td>Fields</td><td>
<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Label</td><td>The label shown for this field when generating this report.</td></tr>
<tr><td>Name</td><td>The name of the field for use in query substitution.</td></tr>
<tr><td>Type</td><td>The type of field.
<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Text</td><td>A text input field.</td></tr>
<tr><td>Select</td><td>A select menu, with the provided options.</td></tr>
<tr><td>Date</td><td>A date picker.</td></tr>
</table>
</td></tr>
<tr><td>Required</td><td>Whether or not the field is required.
<table>
<tr><th>Options</th><th>Description</th></tr>
<tr><td>No</td><td>The field is not required.</td></tr>
<tr><td>Yes</td><td>The field is required to have something specified. For select field types, one of the specified options must be selected.</td></tr>
<tr><td>Custom Regex</td><td>The value for the field must pass this regular expression.</td></tr>
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</table>

Editing a Custom Report

To edit a custom report, click the **Edit** link next to the report you wish to update under **[Billing] > [Reports] > [Customize]**.

Deleting a Custom Report

To delete a custom report, click the **Delete** link next to the report you wish to remove under **[Billing] > [Reports] > [Customize]**.

Some Example Custom Reports

Report Name	Report Information

Client Credits	This will generate a report containing all clients that have credits in the selected currency, and include the amount of the credit and their client ID.

Query

```
SELECT SUM(temp.credit) AS credit,  temp.client_id
FROM (
    SELECT SUM(IFNULL(transaction_applied.amount, 0)) AS
applied_amount,
        transactions.amount AS approved_transaction_amount,
        (transactions.amount - SUM(IFNULL(transaction_applied.
amount, 0))) AS credit,
        transactions.client_id,
        transactions.amount,
        transactions.gateway_id,
        transactions.transaction_id,
        transactions.status,
        transactions.date_added
    FROM transactions
    LEFT JOIN transaction_applied
        ON transaction_applied.transaction_id = transactions.id
    WHERE transactions.status = 'approved' AND transactions.
currency = :currency
    GROUP BY transactions.id
    HAVING applied_amount < approved_transaction_amount
) as temp
GROUP BY temp.client_id
ORDER BY credit DESC
```

Fields

Label	Name	Type	Required
Currency	currency	Text	Yes

Example Output

"credit","client_id"
"155.0000","2"