beon Insight

Freight Expense Management System

General | User Guide

February 2023

Table of Contents

FEMS General User Guide

This user guide provides specific support to most sections of FEMS, except for Reports.

For additional support with the Reports sections of FEMS, please reference: *Beon Insight Report Specific User Guide.*

- About Financial Optimization (Page 3)
- Log-in Instructions (Page 4)
- Landing Page | Settings and Features and Menu (Pages 5-6)
- Locate Reports Quickly (Page 7)
- Locate Tracking and Invoice Numbers Quickly (Page 8)
- Data Management | SwiftBox (Pages 9-10)
- Tools (Pages 11-14)
- Invoices (Pages 15-17)
- Other Apps (Page 18)
- Maintenance (Pages 19-20)
- Detailed Report Descriptions and Locations (Pages 21-25)
- Invoice Status Definitions (Page 25)
- Support (Page 26)

© 2023 Transportation Insight | All rights reserved.

About Financial Optimization

Reporting is located under the **Reports** section and has been divided into 5 different categories: Financial, Financial Metrics, Operational, Operational Metrics, and Optimization.

The Centralized hub of separate data points to help guide data-driven decision-making to reach operational excellence.

About Financial Optimization

- **Financial** – Reports on financial metrics, and invoice information.
- **Financial Metrics** – All financial reports providing spending trend data.
- **Operational** – Reports related to operational items: cost transaction summaries (accessorial information), lost shipments, Package Level Detail reports, and shipment status data.
- **Operational Metrics** – Operational reports specifically surrounding shipping metrics (carrier performance, late shipment details, etc.).
- **Optimization** – Reports related to optimizing your shipping spend: dimensional data and package optimization.

Additionally, **Custom Reports -** Available by request. Located under the REPORTS menu labeled with Client's Name.

© 2023 Transportation Insight | All rights reserved.

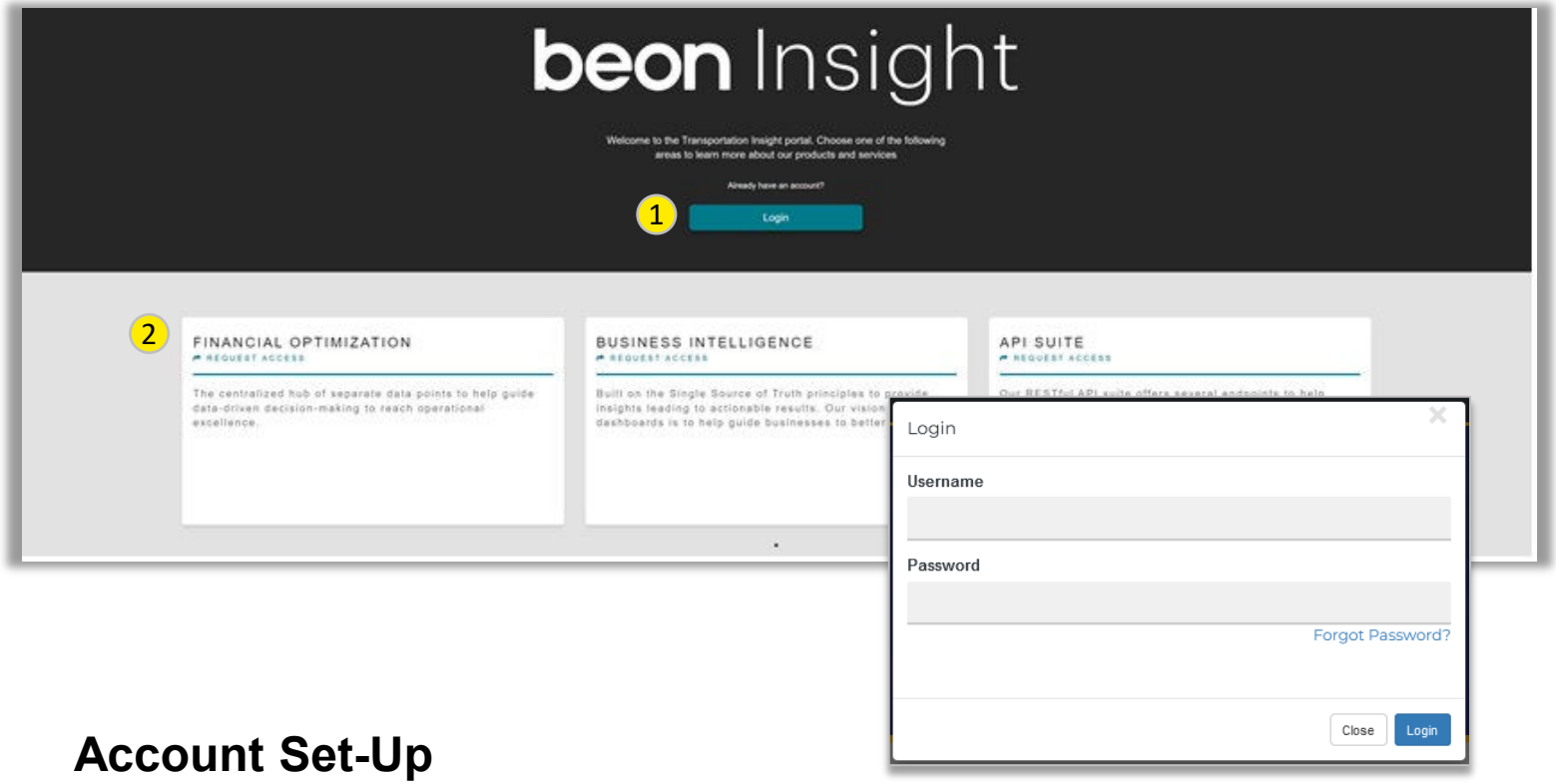
Login Instructions

Access the TI BI Tool at https://ti.platinumportals.com/

(1) Log in with email and password.
(2) Select Financial Optimization

Two-factor authentication has been established for all clients. At login, you will receive an email (a NO REPLY email) with an authorization code to input into a pop-up screen.

To change your password, click on your name in the top right corner, then select 'Your Account'.



Account Set-Up

You will receive a welcome email with a link to the platform.

Use the login credentials that will be sent automatically from our system (specifically, a NO REPLY email) via a secure **one-time use link**.

Please note this link will expire if not used within 48 hours of being sent, and that once you exit out of the page you will not be able to return.

© 2023 Transportation Insight | All rights reserved.

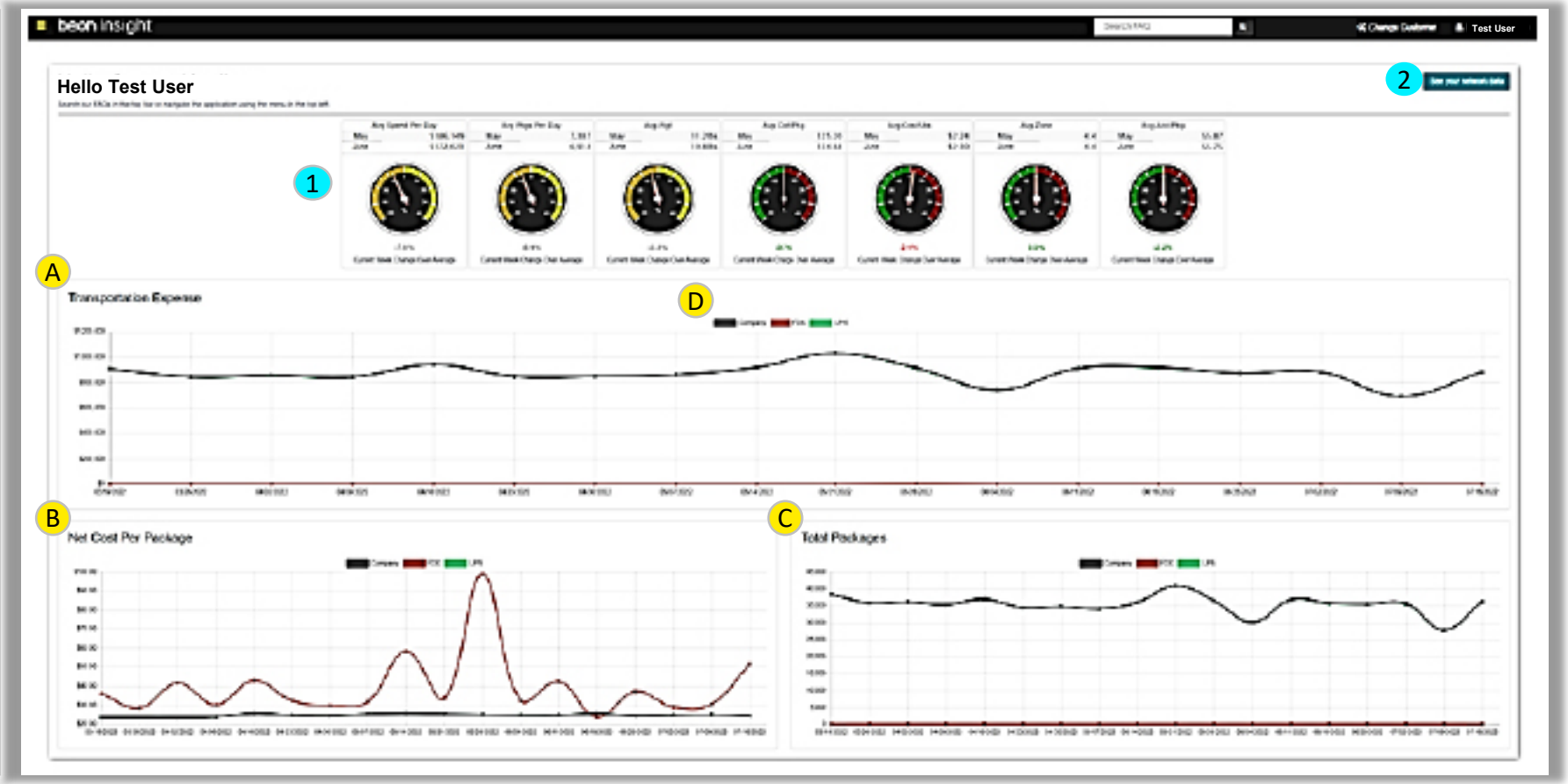
Landing Page | Settings and Features

Data Features:

1. **Gauges -** Quickly Measure/Compare the previous two months' data and display average comparisons with the following gauges: Avg Spend Per Day, Avg Pkgs Per Day, Avg Weight, Avg Cost/Pkg, Avg Cost/Lbs, Avg Zone, and Avg Acct/Pkg.
2. **See your Network Data -** Client access to customized Metropolitan Statistical Area (MSA) data.

Quick Monthly View of Expenses at these Charts:

- **A. Transportation Expense –** monthly net transportation expenses
- **B. Net Cost Per Package-** average net cost per package
- **C. Total Packages –** total number of packages
- **D. Remove Carrier information** by clicking on the name to strike through and modify chart data



© 2023 Transportation Insight | All rights reserved.

Landing Page | Menus

The following dropdown menus host the options below:

DATA MANAGEMENT
- Swiftbox EZBuilder

TOOLS
- Custom Account List
- Get Transit
- Shop Freight

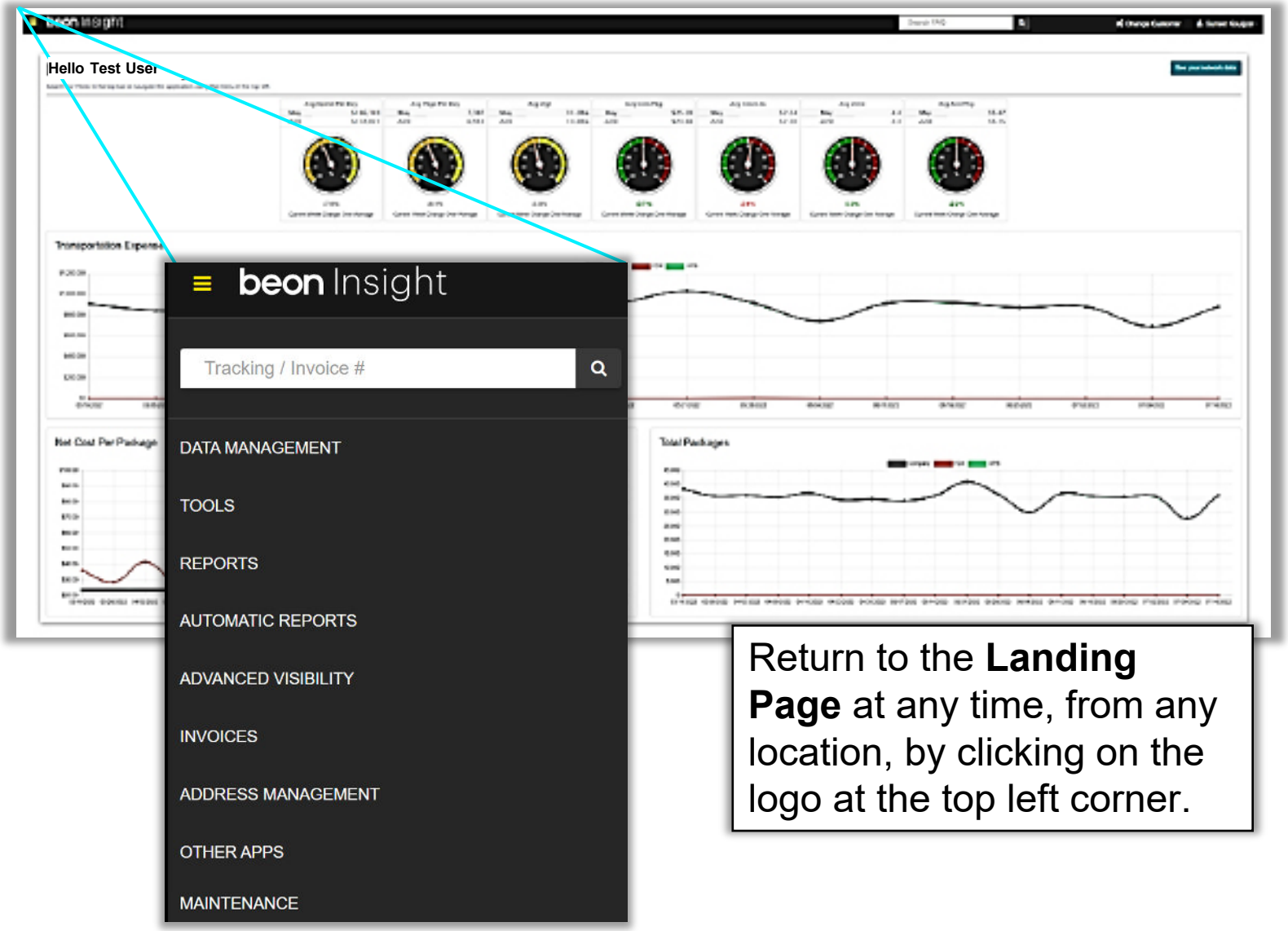
REPORTS
- Financial
- Financial Metrics
- Operational
- Operational Metrics
- Optimization

AUTOMATIC REPORTS
- Create New Automatic Reports
- Find Automatic Reports
- Advanced Visibility

INVOICES
- General Ledger Coding
- Invoice Management
- Address Management

OTHER APPS
- Parcel Fusion

MAINTENANCE
- Account List
- Service Fee Only Accounts



Return to the **Landing Page** at any time, from any location, by clicking on the logo at the top left corner.

© 2023 Transportation Insight | All rights reserved.

Locate Reports Quickly

By Topic:
Use *Search FAQ Box*. Type a topic or word (see address corrections example on the right) to return all reports containing that word.

REPORTS Menu:

- **Financial** – Financial metrics, invoice information.
- **Financial Metrics** – Financial reports providing spending trend data.
- **Operational** – Cost transaction summaries (accessorial information), lost shipments, Package Level Detail report, and shipment status data.
- **Operational Metrics** –Operational reports specifically surrounding shipping metrics (carrier performance, late shipment details, etc.).
- **Optimization** –Optimize your shipping spend: dimensional data and package optimization.

Custom Reports:
Available by request.
Located under the REPORTS menu labeled with Client's Name.

Report Information Button:

Hover over the *Information Button* next to any report title to reveal the purpose and execution of the report (i.e., by Ship Date, Invoice Date, Paid Date).

Use the **Search FAQ Box** to search for a report by topic. In the example below *address corrections* was typed into the **Search FAQ Box** and returned applicable results (below).

© 2023 Transportation Insight | All rights reserved.

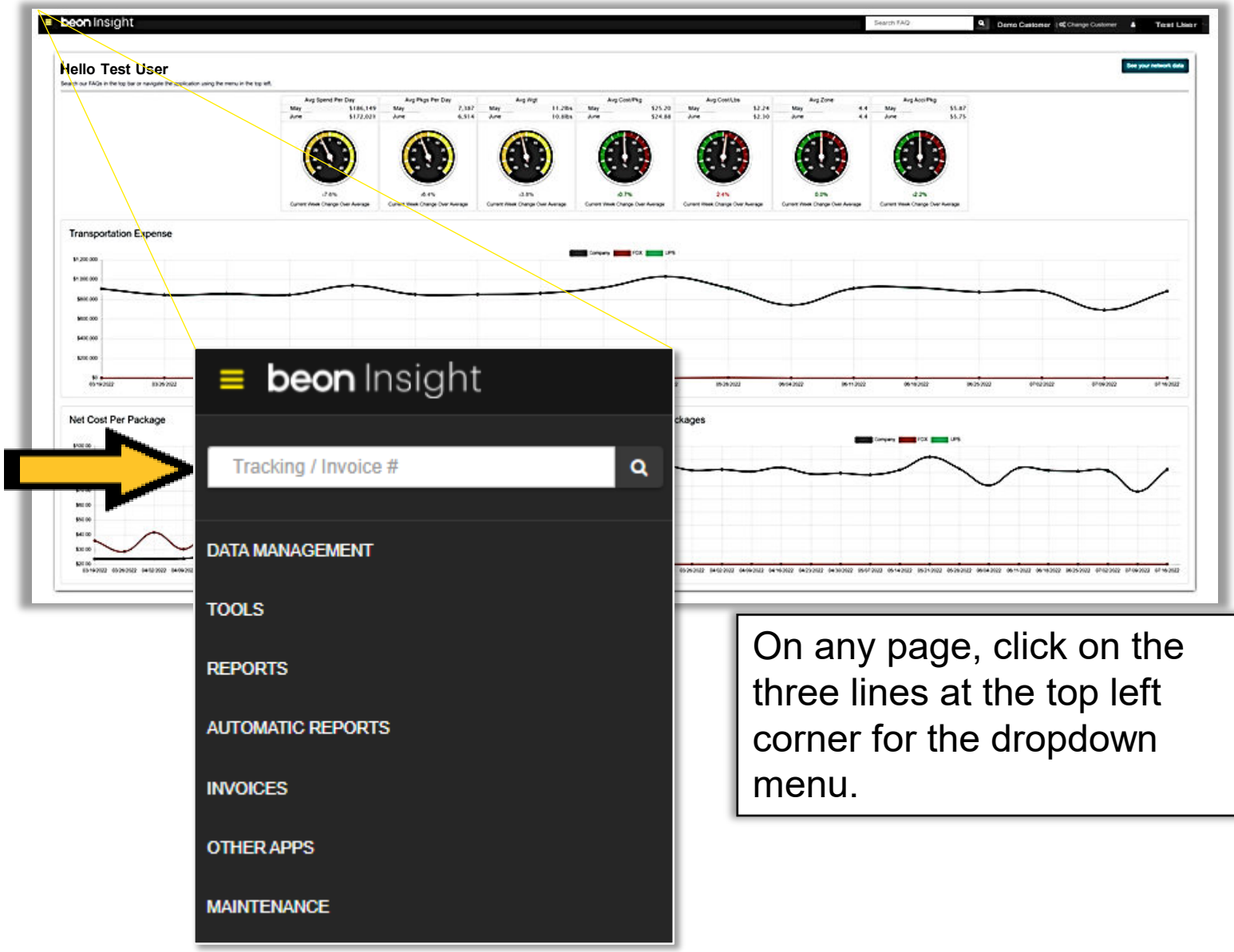
Locate Tracking and Invoice Numbers Quickly

On any page, click on the three lines at the top left corner to see the Tracking / Invoice search bar.

Enter the Tracking or Invoice Number and press enter.

Tracking Number Quick Search Results include Financial Info, Delivery Info, Sender/Destination Info, Shipment Info, and Reference Info.

Invoice Number Quick Search Results include Invoice Info, Financial Info, and Invoice History.

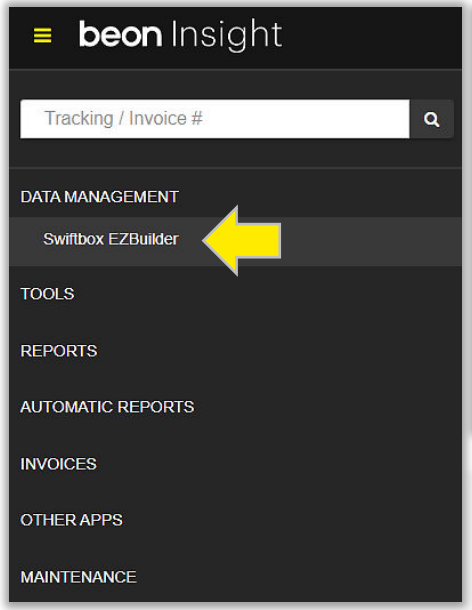


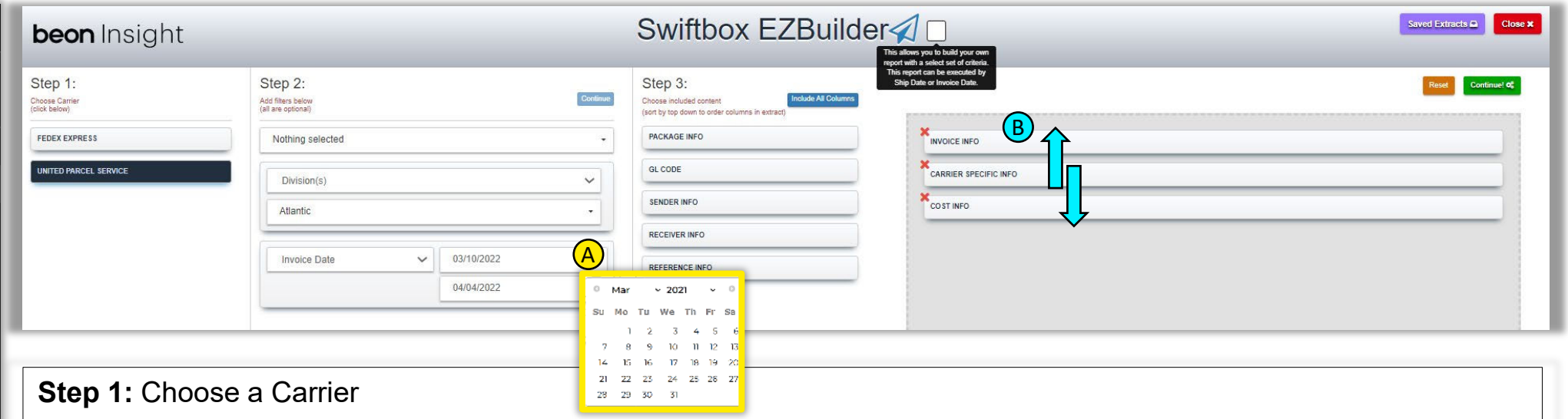
On any page, click on the three lines at the top left corner for the dropdown menu.

© 2023 Transportation Insight | All rights reserved.

DATA MANAGEMENT | Swiftbox EZBuilder

Customize a report with a select set of criteria.





Step 1: Choose a Carrier

Step 2: Add filters using the drop-down menus:

- Filter for (Invoice #, Account #, GL Code, Sender, Receiver, Service, Reference Data)
- Filter options (All Accounts or Division(s))
- Select Invoice Date or Ship Date or a date range. **(A)** Click on a date and then choose a day from the calendar.
- Select the **Continue** button.

Step 3: Customize report content by dragging a content item(s) from the left column and dropping it into the gray box on the right. To deselect an item in the gray box, click the red X on the item. Sort by top-down to order columns in the report. **(B)** For column order preference, click and drag a content item in the gray box, up or down.

Step 4: Select the **Continue** button at the top right.

Proceed to the next page, **Submit Your Extract**.

© 2023 Transportation Insight | All rights reserved.

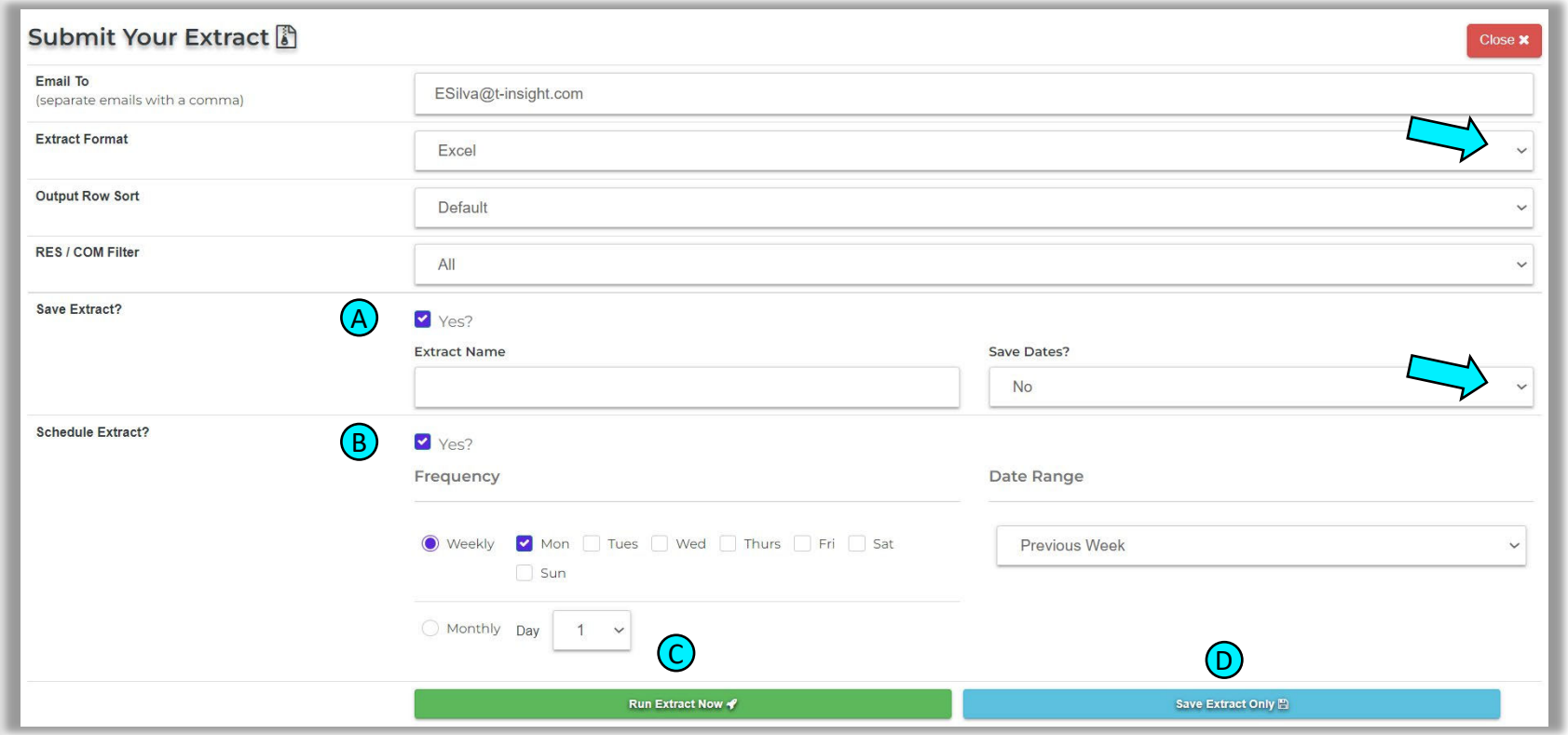
DATA MANAGEMENT | Swiftbox EZBuilder (cont'd)

Submit Your Extract

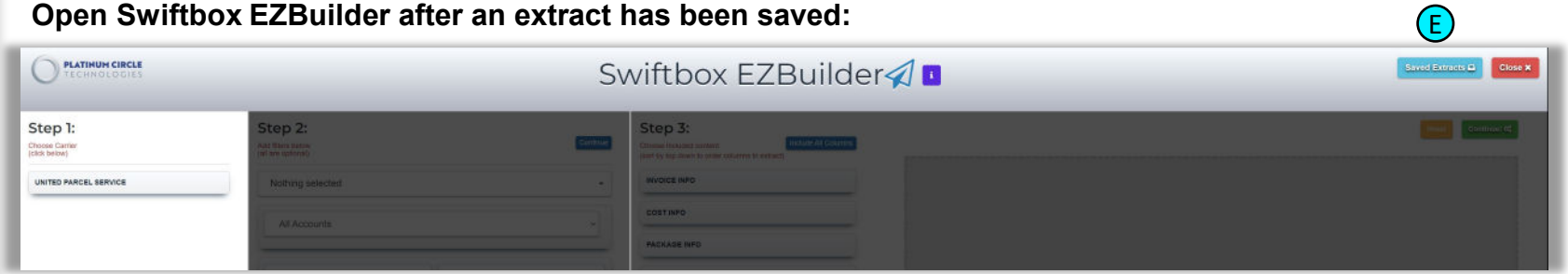
Use the drop-down menus for options:

- **Extract Format**: Select Excel or CSV
- **Output Row Sort**: Select Bill Amount Largest or Smallest First, Bill Weight Largest or Smallest First, or Actual Weight Largest or Smallest First
- **RES / COM Filter**: Select All, Residential Only, or Commercial Only
- **Save Extract:** Save the report parameters for future use. **(A)** Check **YES** and **Name the Extract.**
- **Schedule Extract:** by **Frequency - Weekly** by day of the week or **Monthly** by the date of the month. **(B)** Check **YES** and select the frequency. Or by **Date Range:** Week to Date, Previous Week, Previous Day, Previous Month, Week to Date, Month to Date, 2 Weeks Prior or Last 7 Days.

For report results, choose:
(C) Run Extract Now a report will be emailed, or
(D) Save Extract Only When an extract is saved, they can be found when you reenter Swiftbox EZBuilder at the **(E) Saved Extracts** button on the top right.

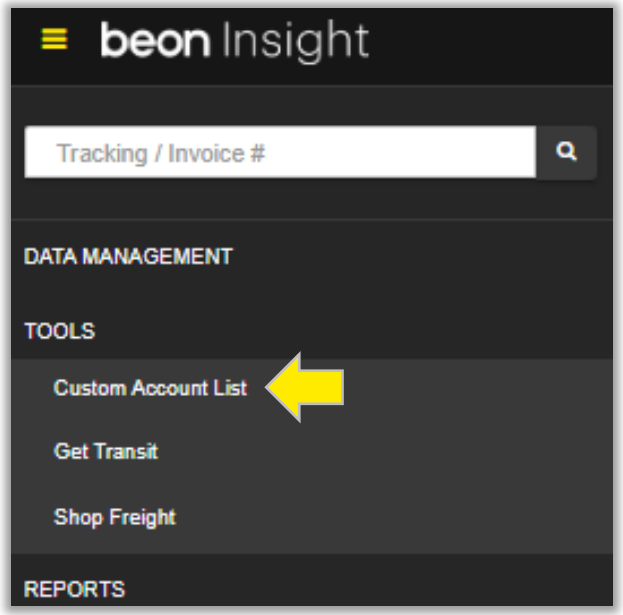


Open Swiftbox EZBuilder after an extract has been saved:



© 2023 Transportation Insight | All rights reserved.

TOOLS | View Custom Account List and Add a New Custom Account List

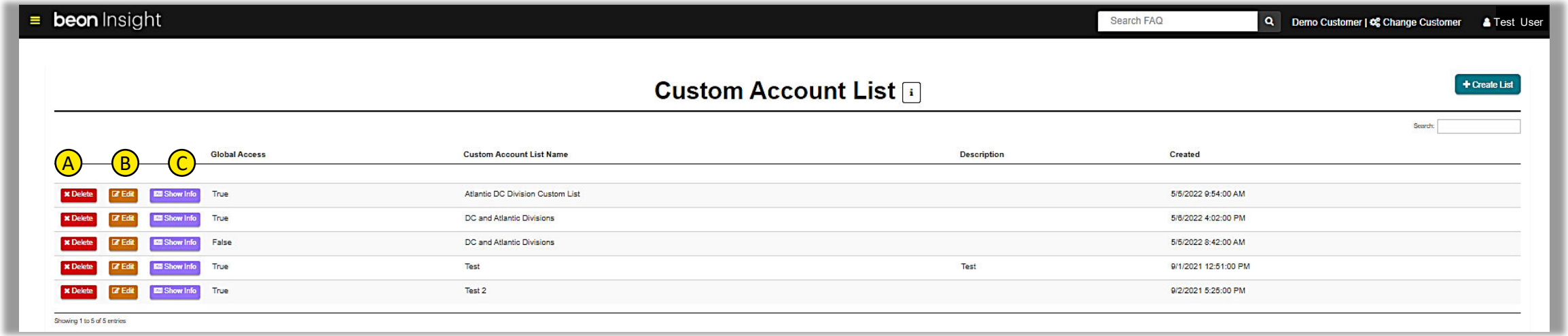


Locate and view custom group accounts/divisions.

View & Modify Current Custom Account Lists:

A. Delete a current list.
B. Edit Division(s), Account(s), name, and/or access to a current list.
C. Show Info offers a summary of the list contents.

See next page to Add a New Custom Account List.



© 2023 Transportation Insight | All rights reserved.

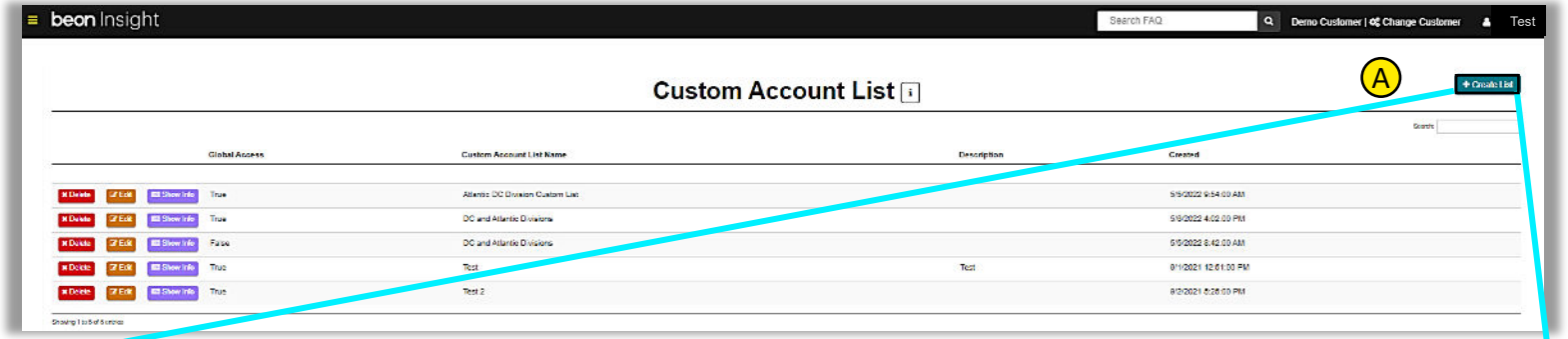
TOOLS | Add a New Custom Account List

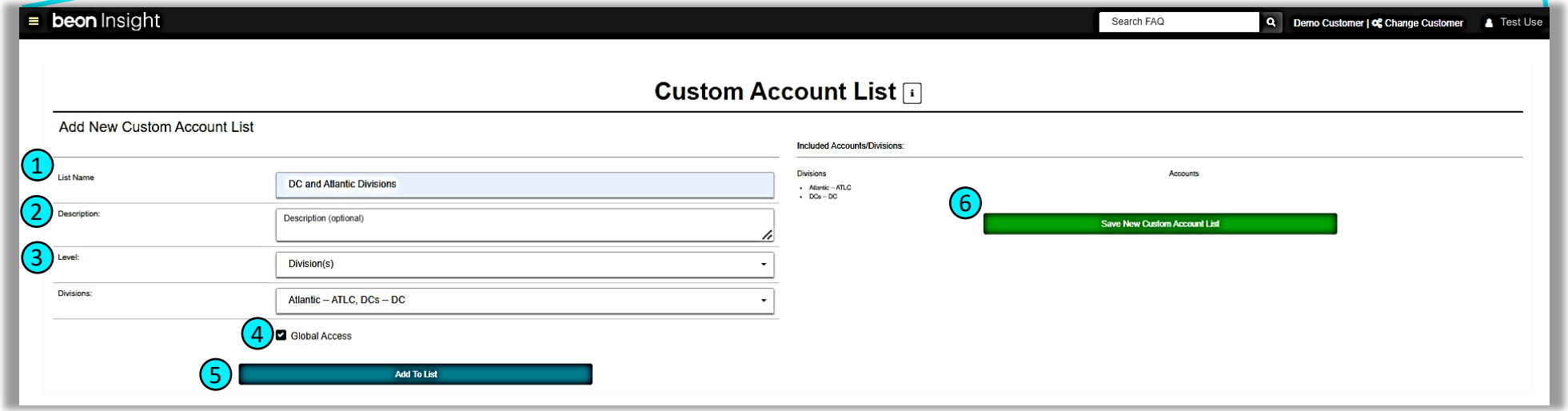
Create a new custom group accounts/divisions.

At Tools >Custom Account List

(A) Select CREATE LIST :

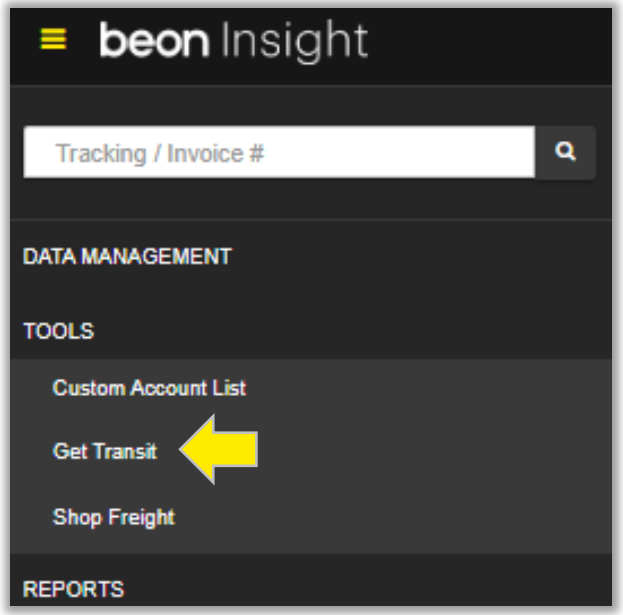
1. List Name: enter a name for the new list.
2. Description: Optional area to describe list contents.
3. Level: Select Division(s), or Account(s). To choose multiple divisions or accounts, hold the shift key down for each selection.
4. Global Access: When checked, allows all employees view access to the list. When it is not checked, only the user who created the list is able to access it.
5. Add To List: Confirms list information.
6. Save New Customer Account List: Add the list to the Custom Account List page.





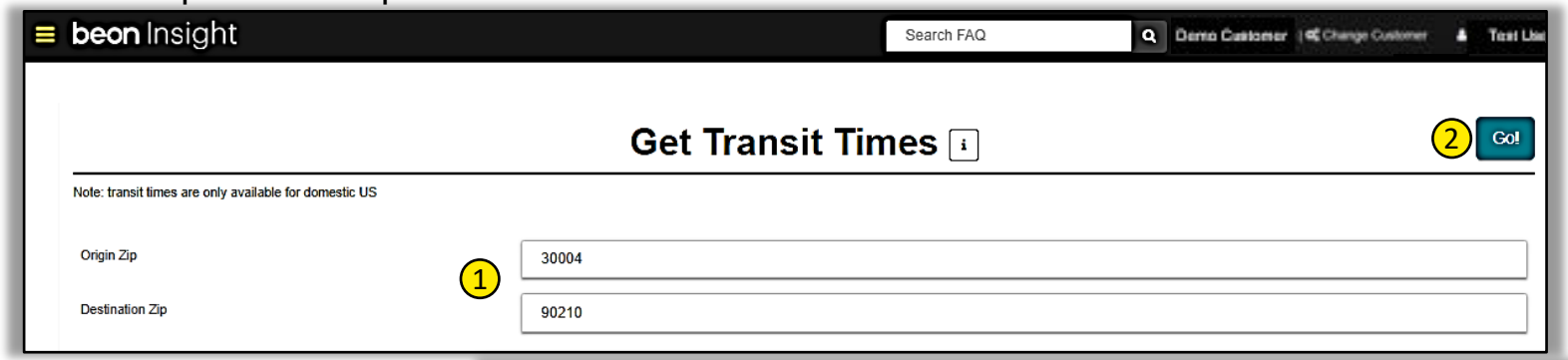
© 2023 Transportation Insight | All rights reserved.

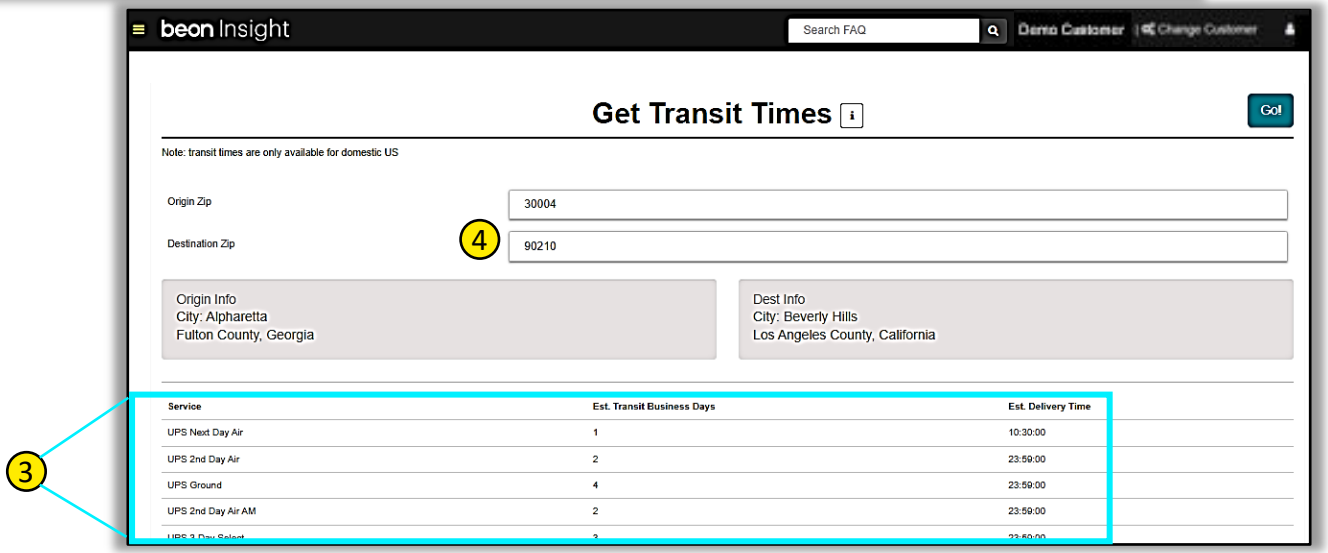
TOOLS | Get Transit Times



Get estimated transit business days from carriers by zip codes (only available in the domestic US).

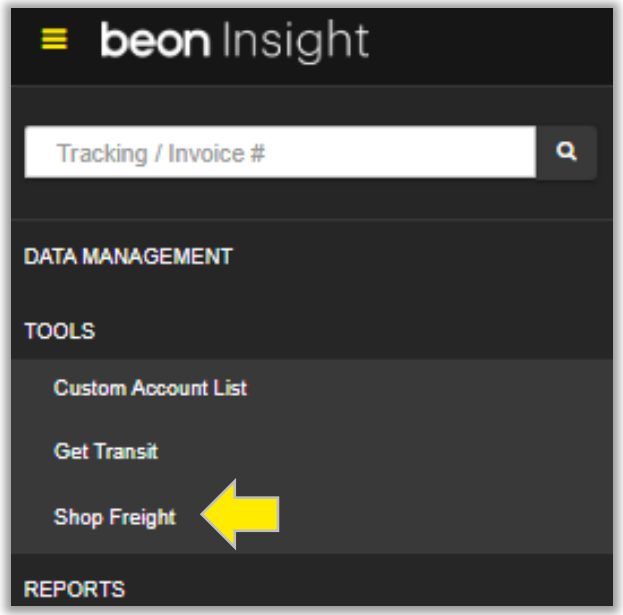
1. Type in Origin Zip and Destination Zip codes.
2. Click GO! at right.
3. View list of carrier options.
4. To Reset - Enter different Origin Zip and Destination Zip codes on the same screen and repeat the previous steps.





© 2023 Transportation Insight | All rights reserved.

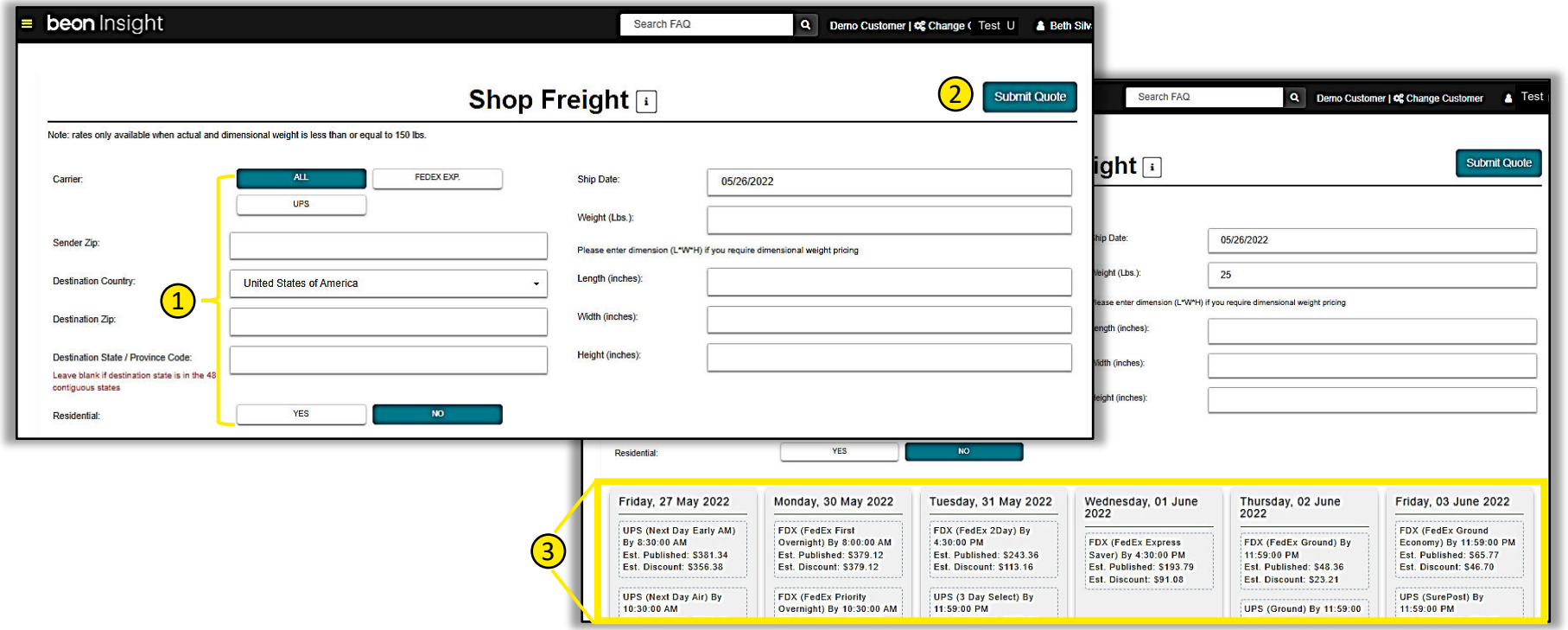
TOOLS | Shop Freight



Receive 5-days of carrier shipping quotes when weight is less than or equal to 150lbs. Customer discounts are included.

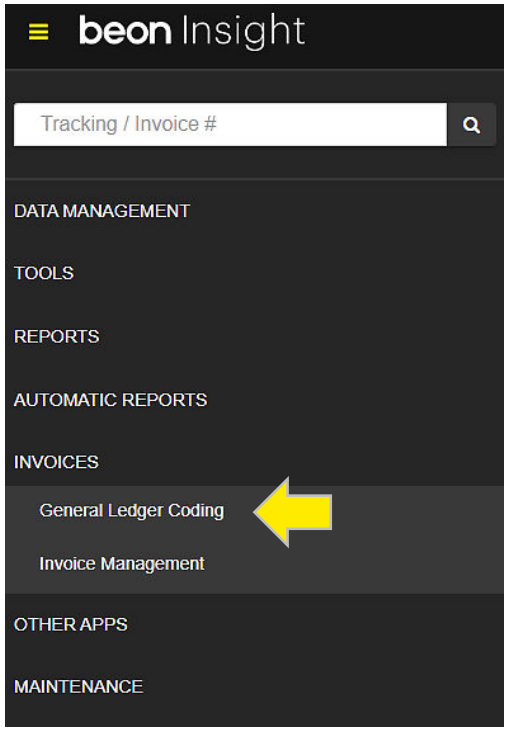
1. Shop Freight options, enter selections for:
   A. Carrier, Sender Zip, Destination Country, Destination Zip, and Weight.
   B. Residential – Yes or No.
2. Click Submit.
3. Review options.

For a new quote repeat steps above.



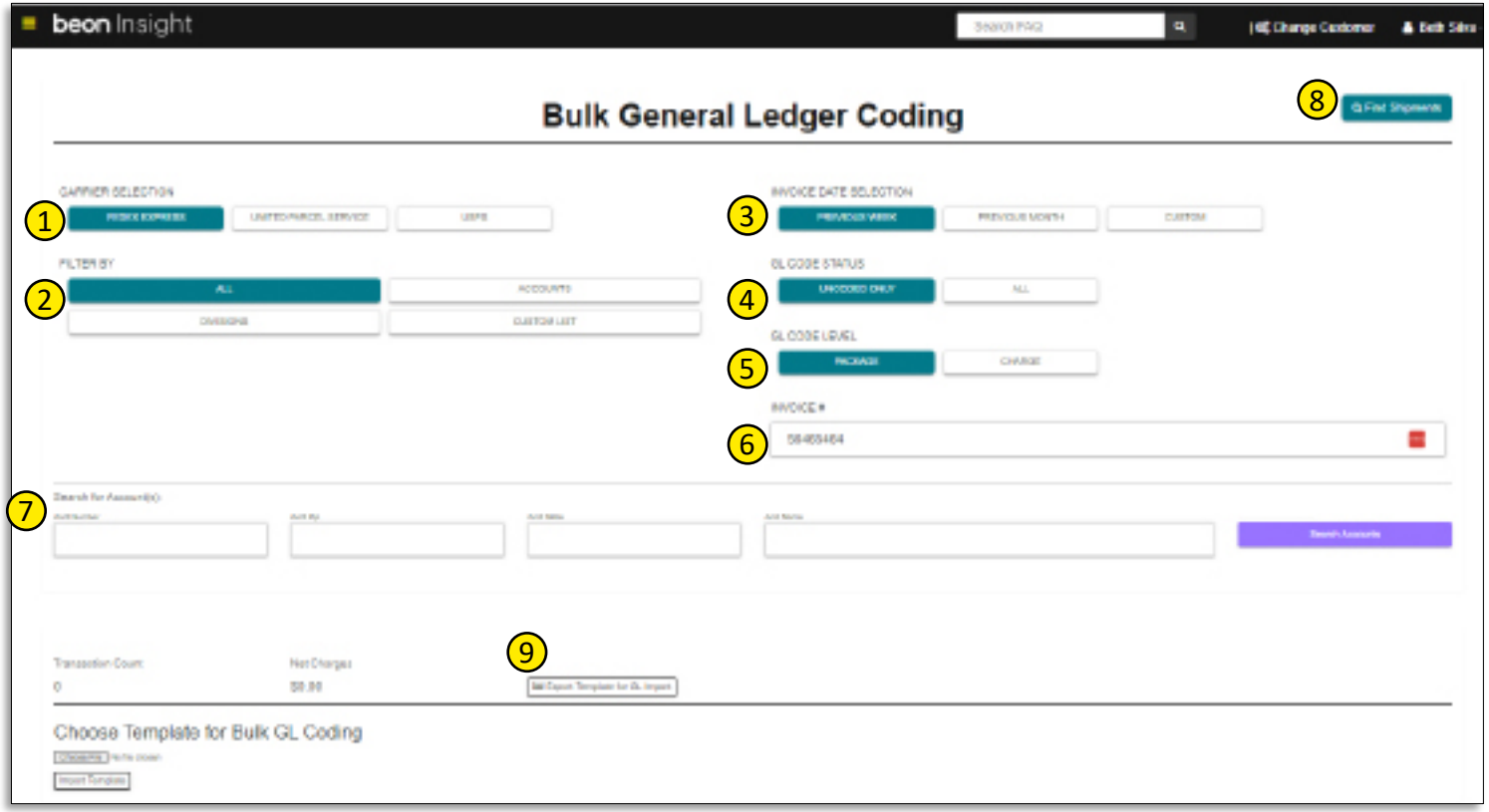
© 2023 Transportation Insight | All rights reserved.

INVOICES | General Ledger Coding (page 1 of 2)



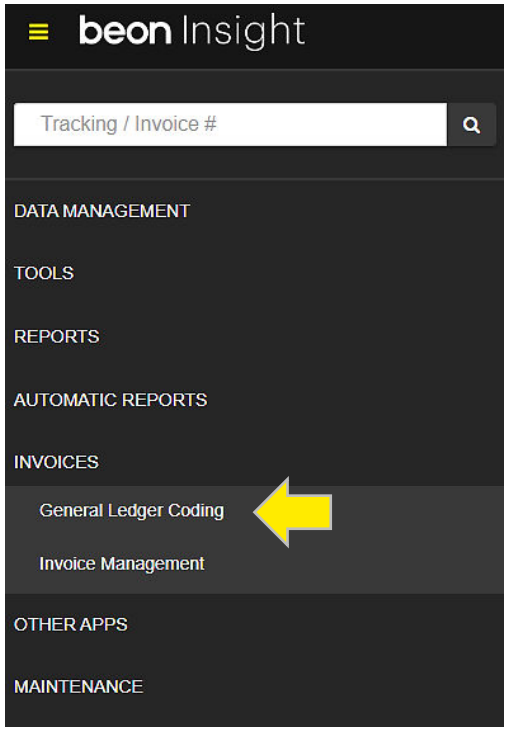
Use this tool to generate a template to change or add new GL coding to certain packages.
Functional for open invoices only.

1. Select the **Carrier.**
2. **Filter by** - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
3. Select the **INVOICE DATE SELECTION**.
4. Select the **GL CODE STATUS**.
5. Select the **GL CODE LEVEL**.
6. Enter an **Invoice Number.**
7. Additional Search for Account(s) options: Acct Number, Acct Zip, Acct State, Acct Name
8. Click **Find Shipments.**
9. A template will be generated as an Excel file (this will be used as a template to save and reload). Click it. This will be used as a template to save and reload. *Continue to the next page…*



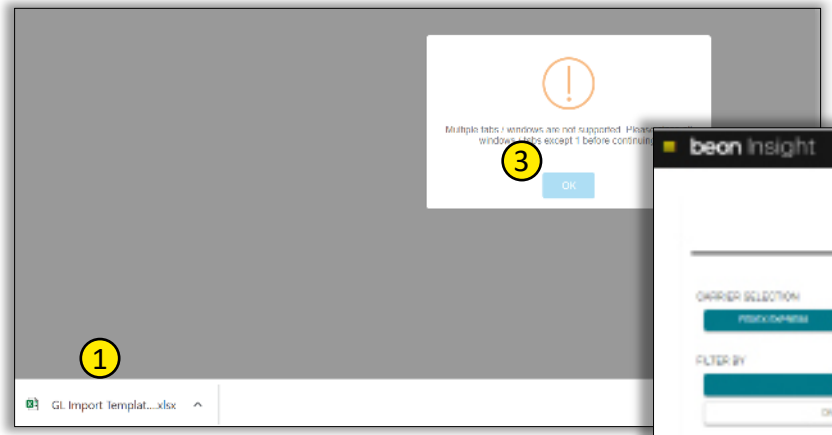
© 2023 Transportation Insight | All rights reserved.

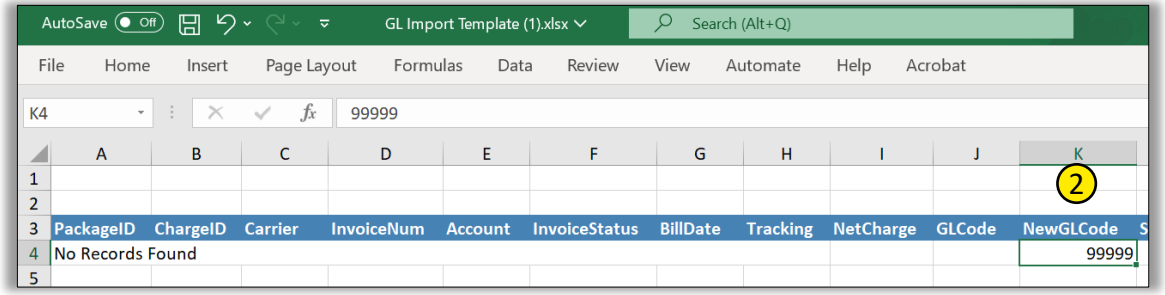
INVOICES | General Ledger Coding (page 2 of 2)

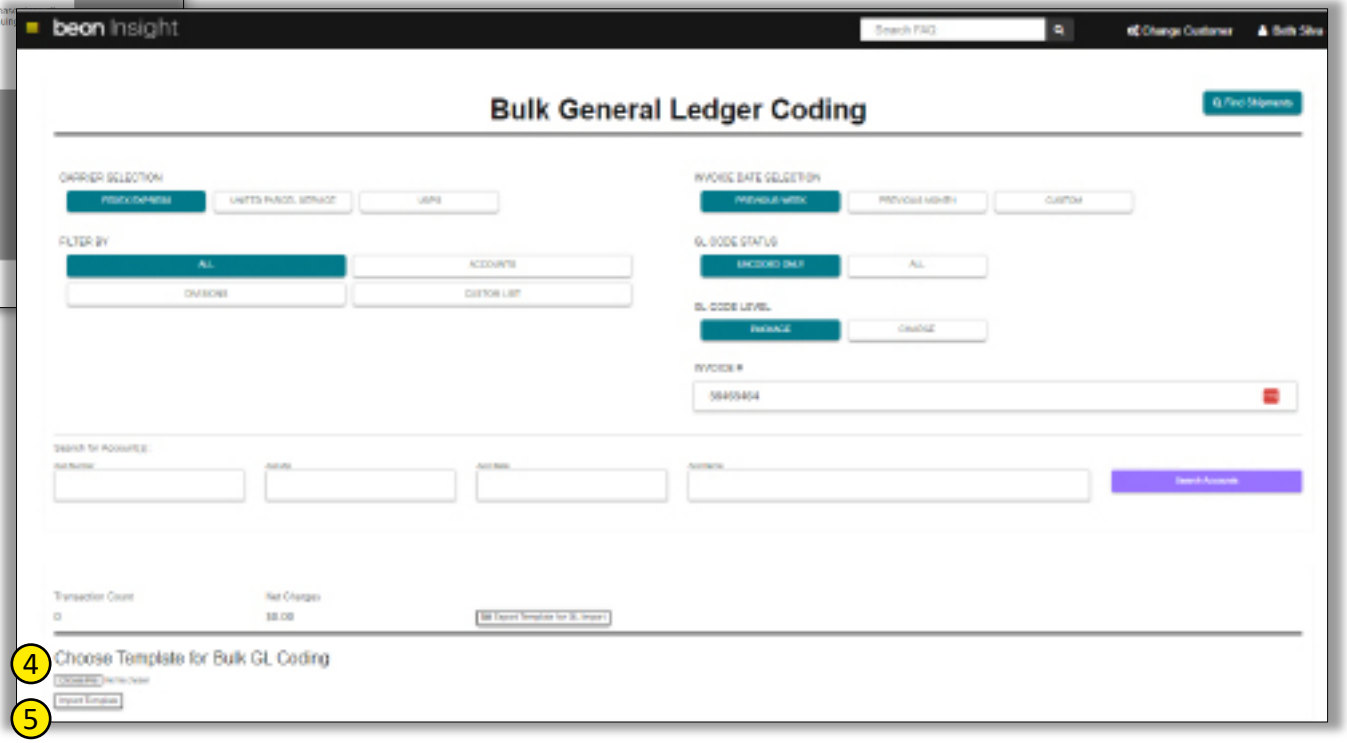


After a template has been generated (see previous page)**, change or add new GL coding to certain packages.**

1. Open the template (GL Import Template), an Excel file from the bottom left corner (or from your Downloads folder).
2. When the template (spreadsheet) opens you will see a column titled "New GL". Enter the new GL code in that column. Once the New GL is added, save and close the template.
3. Select OK.
4. At the Bulk General Ledger Coding page, at Choose Template for Bulk GL Coding, click **Choose File**.
   Select the template file you previously saved; the file name will appear to the right of **Choose File**.
5. Click **Import Template**.
   You will receive a confirmation at the top left of how many rows were adjusted.

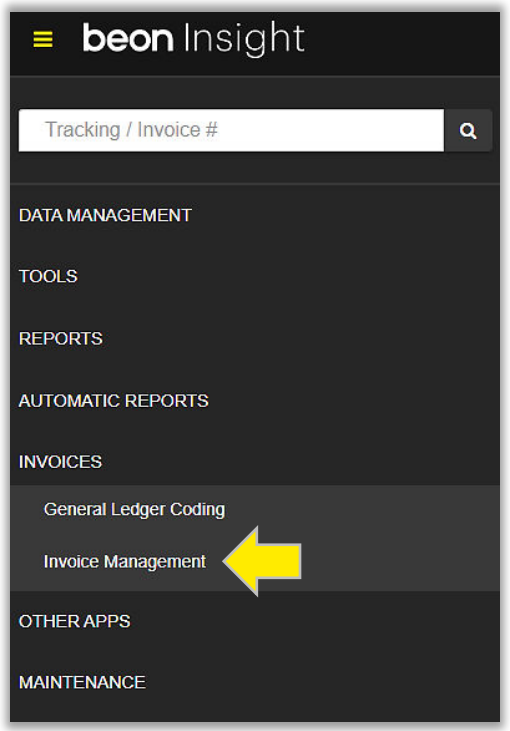






© 2023 Transportation Insight | All rights reserved.

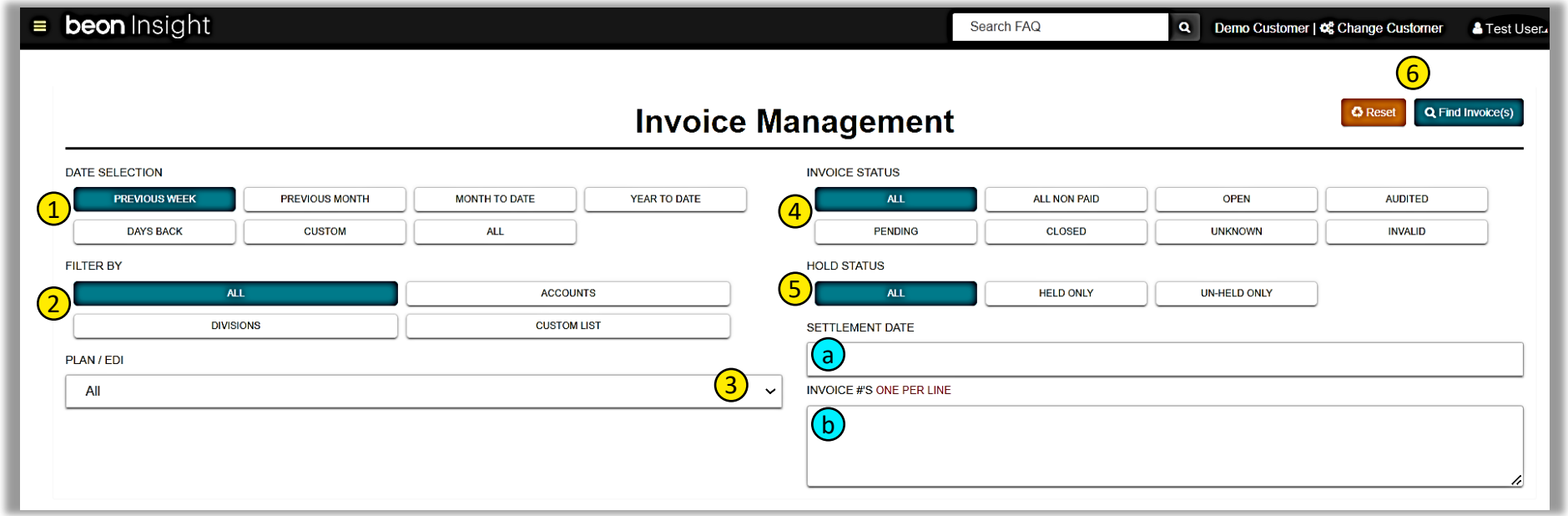
INVOICES | Invoice Management



View invoices that have been loaded into the Beon system.

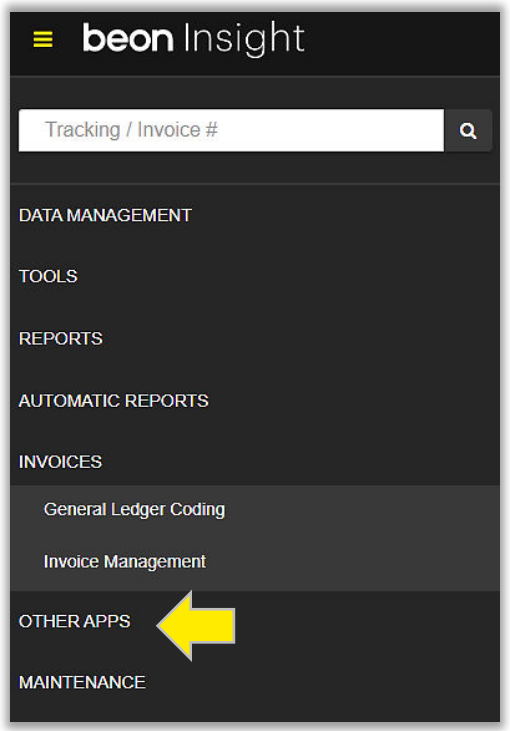
At the first screen: Select one of the Carriers from the list of options. A new screen will appear as below:

1. Select Date Selection.
2. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
3. Use the dropdown menu to select the PLAN/ EDI.
4. Select the INVOICE STATUS.
5. Select the HOLD STATUS.
   a) Optionally, enter the Settlement Date, using the pop-out calendar.
   B) Optionally, enter an Invoice Number –ONE PER LINE.
6. Choose Reset or Find Invoice(s).



© 2023 Transportation Insight | All rights reserved.

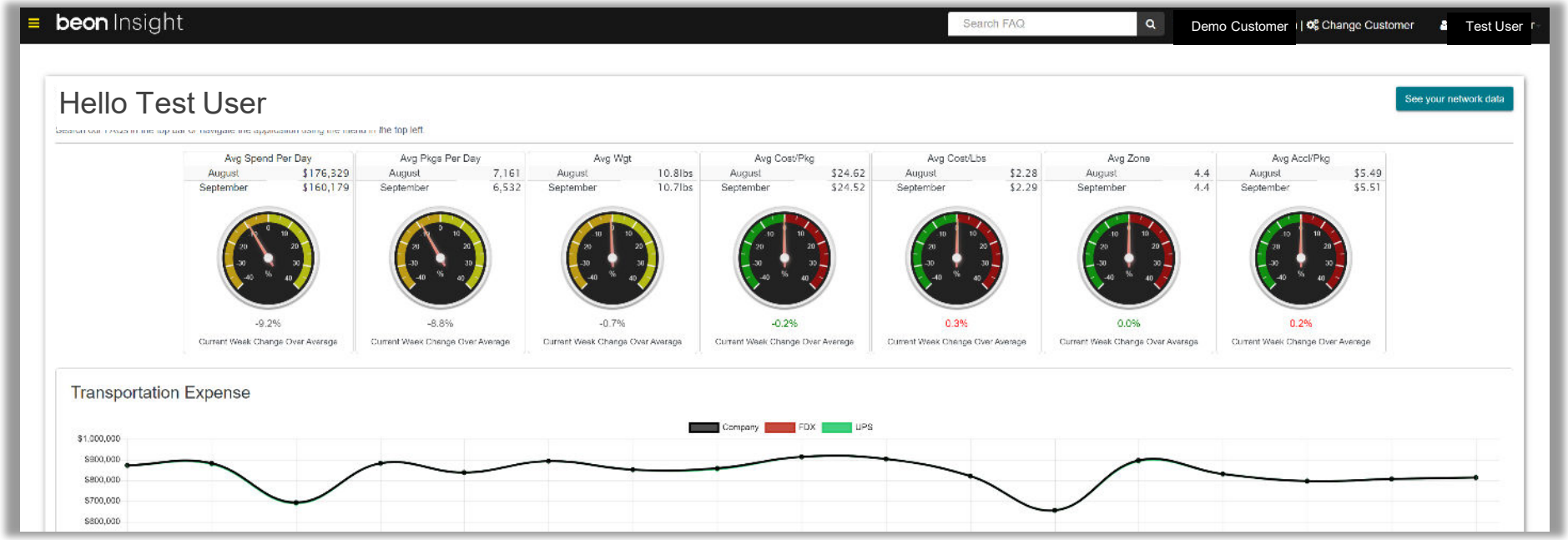
OTHER APPS | Dashboards Portal Link



Other Apps links to Parcel Fusion Dashboards.

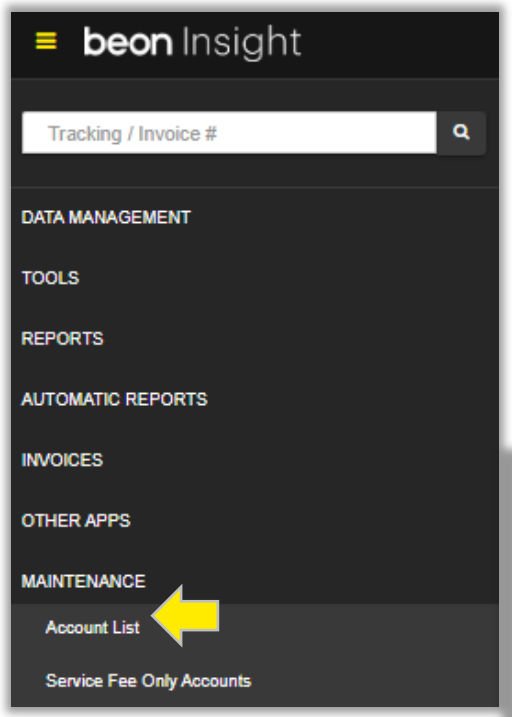
Other Apps provides a link to **Parcel Fusion Dashboards**; a high-level view of carrier spend data in real-time. Quickly access "spend trends" with carriers in a chart, graph, and/or report format(s).

For additional information view the **Beon Insight Dashboards User Guide**.



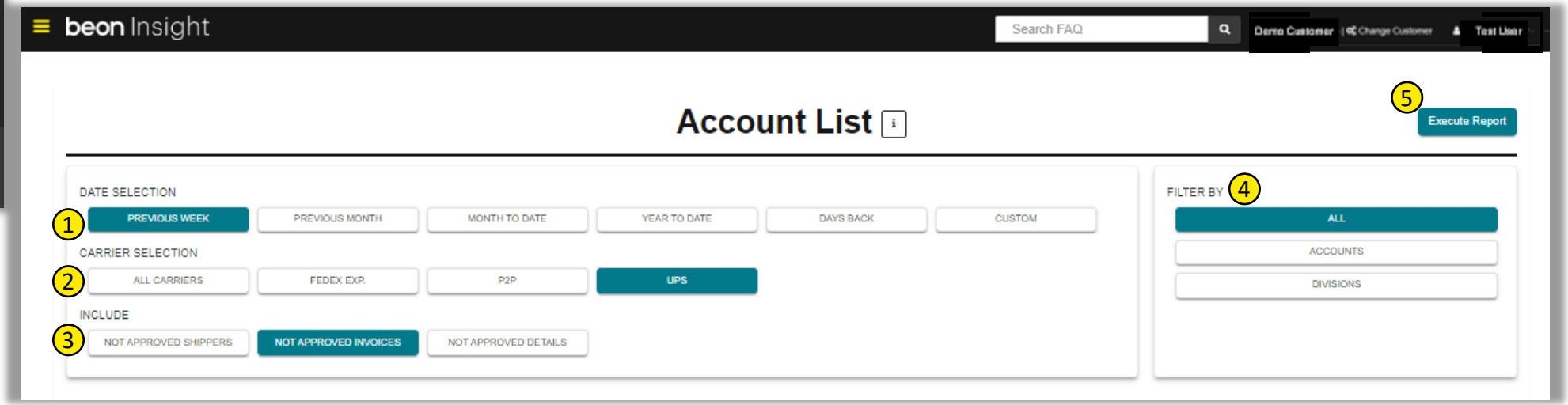
© 2023 Transportation Insight | All rights reserved.

MAINTENANCE | Account List



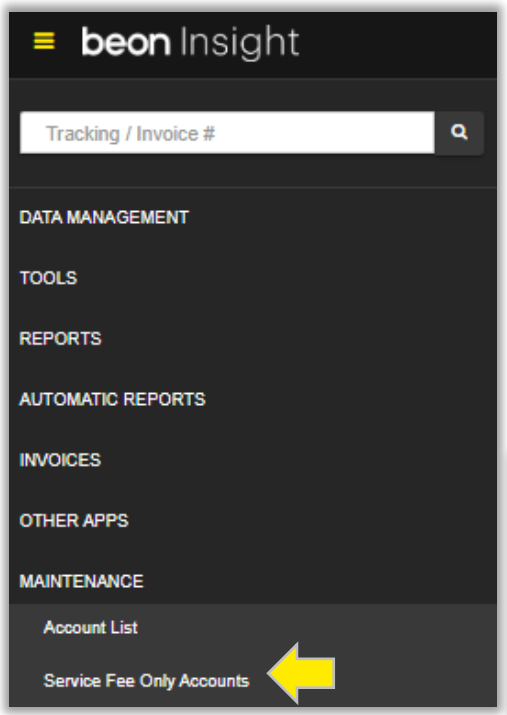
Lists all approved and not approved account numbers. This report is executed by Invoice Date and will return accounts that were billed on Invoice Dates for the date range selected.

1. Select the Date Range.
2. Select Carrier.
3. At Include, select one or all of the following: Not Approved Shippers, Not Approved Invoices, and /or Not Approved Details.
4. Filter by - ALL or select one or multiple from the following drop-down menus:
   Accounts or Divisions.
5. Execute Report to generate a report on-screen or in email.



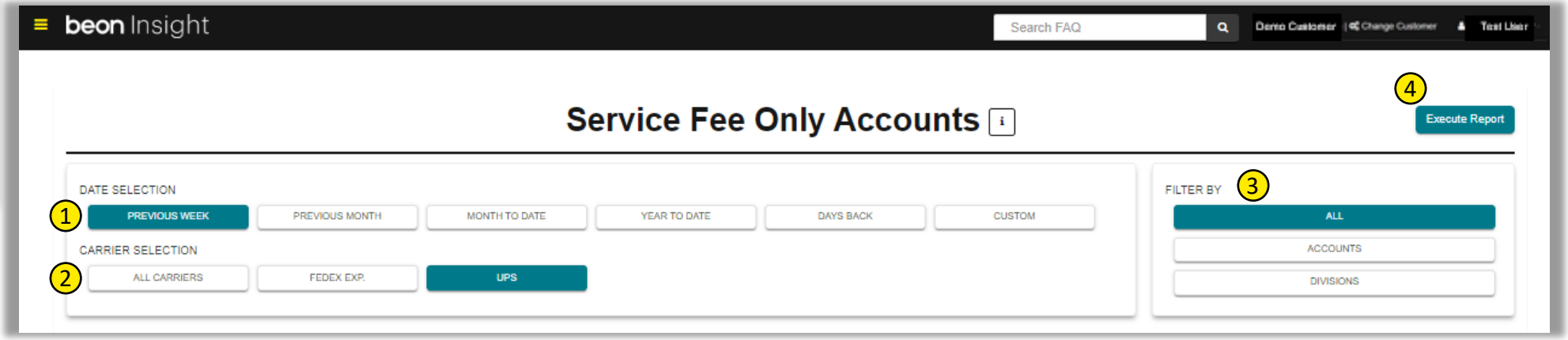
© 2023 Transportation Insight | All rights reserved.

MAINTENANCE | Service Fee Only Accounts



Provides a list of accounts that only received service fees on the invoices for the date range selected. This report is executed by Invoice Date.

1. Select the Date Range.
2. Select Carrier.
3. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts or Divisions.
4. Execute Report to generate a report on-screen or in email.



© 2023 Transportation Insight | All rights reserved.

Report Descriptions | **FINANCIAL & FINANCIAL METRICS**

FINANCIAL > FedEx

FedEx Adjustment Requests
View FedEx adjustments for Commercial/Residential, Duplicate Tracking, or Saturday Pickup/Delivery. This report shows the invoice date, invoice #, invoice status, tracking #, ship date, due amount, adjustment amount, approved amount, reason, response, and request status. *This report is executed by Invoice Date.*

FedEx GSR Summary
Display the status of any GSRs requested in the given date range for FDX. See the acct #, status of GSR, approved, denied, total packages, denied %, and net charge. *This report is executed by Invoice Date.*

FINANCIAL > UPS

UPS GSR Request
This report presents the UPS GSR requests for a given time period. View total denied and total successful results. Expand the collapsed categories, for detailed information such as account #, tracking #, pickup date, freight cost, when it was filled online, and the denial or approval response from UPS. *This report is executed by Pick up Date.*

UPS Void Request
This report is executed and sent to UPS customer service from Transportation Insight. It generates invoices that were manifested but never shipped. View acct #, invoice #, invoice date, tracking #, carrier, bill option, quantity, shipped date, scheduled date, freight, sender, to, and reference information. Results will document UPS credit due for packages that were manifested but not shipped.

FINANCIAL >

Billed to Shipment Profile
Document when packages are billed and summarized by date shipped. The carrier, closed date, delivered date, and the billed amount are displayed. Includes Non-Delivered Expense report. *This report is executed by Invoice Date.*

Carrier Credits
View the carrier's credit amount (and the category the credit falls under) during a specific date range. The 'Data' tab provides more detailed information about the credits including invoice #, bill date, tracking #, service description, net charge, credit type, and category.
This report is executed by Invoice Date.

Carrier Invoice / Remittance
Display a summary of carrier remittance for invoices closed in the Transportation Insight system; broken down by account # and invoice #. *This report is executed by Invoice Date or Paid Date.*

Financial Accrual
Summarize transaction count and net amount of shipments by GL code, invoice number, or single line total on this report. View GL code, invoice #, carrier, invoice date, acct #, ship date, transaction count, and net amount. *This report is executed by Ship Date or Invoice Date.*

General Ledger
View GL code, package count, transaction count, and net amount.
This report is executed by Ship Date, Invoice Date, or Paid Date.

List of Invoices
Generate a list of all invoices (in progress, audited, and paid). This report provides the Plan#, account #, carrier, acct location, invoice date, invoice #, invoice status, control #, settlement date, currency, billed amount, and amount paid. *This report is executed by Invoice Date or by Paid Date.*

FINANCIAL METRICS >

Cost Drivers By Location
View the total spend, total packages, and cost per package (CPP) for a selected date range. Differentiate costs by accessorials, fuel, service, weight, and zone per division and account number. Compare week to week or month-to-month. Select All Carriers or one at a time. *This report is executed by Invoice Date.*

Financial Performance
View total billed dollars for all accessorial categories by both month and week per carrier, per service. Examine each charge category and the # of occurrences, billed amount, and % of total billed for each. Select All Carriers or separate each one. When viewing results for an individual carrier, view options include only Residential, only Commercial, or both. *This report is executed by Ship Date or Invoice Date.*

Invoice Metric
This report provides lists of invoice metrics including weight, package count, cost, avg weight, and avg cost. And the fiscal month, date, carrier, weight, # of packages, cost, average weight, and average cost. *This report is executed by Invoice Date, Ship Date, or Delivery Date.*

© 2023 Transportation Insight | All rights reserved.

Report Descriptions | **FINANCIAL METRICS & OPERATIONAL**

FINANCIAL METRICS (cont'd) >

Invoice – Ship/Delivery/Pay
Compare billed invoices vs shipped invoices. And compare billed invoices vs delivered invoices. This report shows the carrier, fiscal year, invoice month, metric, no date, and then each month where the specific transaction occurs. *This report is executed by Invoice Date.*

Parcel Spend Trending
Compare one month to another; one quarter to another; one year to another. View and compare data based on service type, service zone, charge category, accessorials, etc. Compare billed dollars, transaction count, and the average cost per transaction. Includes the line-item variance. *This report is executed by Invoice Date.*

Parcel Trend Overview
Generate an overview of spending for a given time period separated by service, zone, and accessorials. Similar data as the Parcel Spend Trending report; however, this is not comparing one time period with another. *This report is executed by Invoice Date.*

Shipment Charge Trend Summary
View ALL charges for all accessorials per carrier. Specifically, view TOTALS by carrier: packages; dollar amount; average cost per pkg; average weight; and average cost per lbs. Additionally, break down each accessorial by the # of occurrences; % of total pkgs; billed amount; and % of total billed for each accessorial. *This report is executed by Invoice Date and Ship Date.*

Spend By Ship / Invoice Date
View total transportation spend amounts, package count, average spend per day, avg weight, avg cost/pkg, avg cost/ lbs, avg zone, and avg accessorial/pkg for a date range. Include all carriers or choose one. Reports are presented for Ship Date and Invoice Date.

Late Payment Fee Detail
Provides original invoice details for any late payment fees applied from the carrier. *This report is executed by Invoice Date.*

OPERATIONAL > Cost Transaction Summaries

Address Corrections
Display all address corrections (and REPEATED Address Corrections) recorded by the carrier. This three-tab report shows acct #, division, invoice #, invoice date, service, code, tracking #, bill option, original information (sender, contact name, company name, address, city, state, and zip), corrected information (contact name, company name, address, city, state, and zip), reference notes, billed amount, gross amount, approved amount, and contested amount. The 1st tab summarizes by account #; the 2nd tab provides details for each package that received the address correction; the 3rd tab lists the Repeated Address Corrections. *Execute this report by Invoice Date or Ship Date.*

Carrier Charge Detail
Generate detailed reports for all accessorials. Run this report by bill date or ship date. *This report can be executed by Ship Date or Invoice Date.* TIP: Select one accessorial at a time for best results.

Carrier Charges
Summarize all carrier charges by accessorial on two tabs: Carrier Charges Summary and Carrier Charges Detail. The following are specified: category, transaction code, description, carrier, # of billed transactions, and billed amount. Run this report by bill date or ship date. *This report can be executed by Ship Date or Invoice Date.*

Carrier Chargebacks View all carrier chargebacks with their reasons (Acct # is not valid, acct # is canceled, third party refused to pay, etc.). Display acct #, invoice #, invoice date, carrier, tracking #, service, ship date, bill type, zone, actual weight, billed weight, sender, receiver, reference, reason, original amount, chargeback fee, other charges, and total billed amount.

Hundredweight
Display a list of all invoices that used the Hundredweight service from carrier. View acct #, invoice #, carrier, bill date, tracking #, bundle #, bill type, description, zone, ship date, quantity, actual weight, bill weight, sender, destination, reference, billed amount, approved amount, and contested amount. *This report is executed by Invoice Date.*

Large Package Fees
Review a list of all invoices that have large package fees. View account #, tracking #, invoice #, invoice date, ship date, bill type, service, code, description, sender, destination, zone, actual weight, billed weight, qty, reference #, billed charges, length, width, height, dim divisor, and miscellaneous notes. *This report is executed by Invoice Date.*

© 2023 Transportation Insight | All rights reserved.

Report Descriptions | **OPERATIONAL & OPERATIONAL METRICS**

OPERATIONAL > Cost Transaction Summaries (cont'd)

Peak Season Charges
View additional Peak Season surcharges incurred by the carrier; including the carrier, charge type, transaction count, and billed amount. *This report is executed by Invoice Date.*

Shipment to Accessorial Trend
A summary of the total spend amount per accessorial displaying the charges (number of occurrences), billed amount, average cost, and percent of volume. *This report is executed by Invoice Date.*

Shipping Charge Correction Fees
This report executes only UPS data. It summarizes by account # the count and billed amount of Shipping Charge Correction Fees (SCC) by UPS. And provides an additional tab containing details of these charges, such as tracking #, weights, reference information, and address information.

Size and Weight Impacts
View a summary of data itemizing size and weight charge descriptions by carrier. See carrier, charge category, charge description, account #, net charge, and # of occurrences. *This report is executed by Invoice Date.*

Third-Party Charges
Review invoices that incurred third-party charges -see acct #, tracking #, carrier, invoice #, invoice date, ship date, bill type, service, sender, destination, zone, actual weight, bill weight, quantity, reference, billed amount, approved amount, and contested amount. *This report is executed by Invoice Date.*

Weight Correction Charges
Display a list of invoices where billed weight is higher than actual weight. It shows acct #, invoice #, invoice date, service, bill type, tracking #, zone, ship date, sender, destination, reference, bill weight, actual weight, dimension, billed charges, approved amount, and contested amount. *This report is executed by Invoice Date.*

OPERATIONAL > Lost Shipments

Carrier Lost/Damaged Shipments
View shipments that were either lost or damaged. See acct #, tracking #, carrier, bill type, sender, destination, division name, shipped date, scheduled date, freight charge, value, reference #, and last status. *This report is executed by Ship Date.*

OPERATIONAL > Package Level Reporting

Package Level Detail
View package level detail with the following criteria options: date range, carrier, invoice status (in progress, audited, paid), date range type (ship date, invoice date, paid date), inbound/outbound/both, charge level details, GL options, and individual or all accounts. This data comes directly from the carrier. *Execute this report by Ship Date, Invoice Date, or Paid Date.*

OPERATIONAL > Shipment Detail

Shipment Status Detail
Generate a report with details on late or in-transit shipments. Select voided, lost, in transit, late: exception, late: no exception, or all categories. View acct #, tracking #, carrier, ship date, bill type, service, sender, acct name, destination, scheduled date and time, delivered date and time, billed charges, status, exceptions, and tracking string. *This report is executed by Ship Date.*

Shipment Status Summary
This report summarizes the count of shipments by category. View the status of shipments: total packages submitted; eligible; delivered on time; delivered late without exceptions; late with exceptions; and percentage eligible, on time, and late. *This report is executed by Ship Date.*

Shipment Summary
Summarize total # of pkgs by category. The first section will display the carrier, status (ie.: manifested), bill type (3rd party, collect, prepaid, etc.), # of pkgs, and billed amount. The second section will display the carrier, category (on time, late, damaged, etc.), bill type, # of pkgs, and billed amount. *This report is executed by Ship Date.*

OPERATIONAL METRICS

Carrier Performance
Display total packages per carrier with percentage of packages delivered on-time and late. And number of packages lost, damaged, and in transit. *This report is executed by Ship Date.*

Late Shipment Detail
View shipment details for late packages. The first tab summarizes late shipments by customer, division and account # and percent late. The second tab shows acct #, tracking #, carrier, bill type, shipped date, sender, destination, scheduled time, delivered time, and bill amount. *This report is executed by Ship Date.*

Late Shipment Exceptions
Review shipment exceptions for late packages, including acct #, tracking #, carrier, bill type, shipped date, sender, destination, scheduled date and time, delivered date and time, bill amount, and exception category. *This report is executed by Ship Date.*

© 2023 Transportation Insight | All rights reserved.

Report Descriptions | OPERATIONAL METRICS & OPERATIONAL REPORTS

OPERATIONAL METRICS (cont'd)

Manifested Not Shipped
Display shipments that were manifested but not shipped. View shipped date, acct #, tracking #, carrier, bill type, sender, destination, target delivery date, reference #, and bill amount. *This report is executed by Ship Date.*

On-Time Performance *(*Report is more insightful when clients provide EDI 214/240 Tracking data to TI)* Analyze carrier performance details by utilizing billing data and tracking data to provide metrics by service of packages in transit, on time, late, and lost. This report also provides details surrounding these shipments for the date range selected: service, invoice date, package status, sender information, destination information, ship date, TI's calculated expected delivery date, and the actual delivery date. *This report is executed by Invoice Date, Ship Date, or Delivery Date.*

Returned Shipments
This report generates a list of invoices for returned packages. It summarizes the exception category, package count, and bill amount. In detail, view the acct #, tracking #, carrier, bill type, sender, destination, shipped date, target date, reference #, exception category, and bill amount. *This report is executed by Ship Date.*

Shipment Status Metrics
This is a carrier report that displays shipment status by destination state. Select voided, lost, in transit, late: exception, late: no exception, or all categories. This summary report identifies destination state, sender state, inbound/outbound, # of packages, billed amount, percent of volume, on time, late: No Exception, late: Exception, ineligible/returned/damaged, pending, voided, and lost. *This report is executed by Ship Date.*

Shipments by Service and Zone
Group shipments by service and zone. Run this report by ship date or invoice date. View acct #, invoice #, invoice date, carrier, packages, net amount, avg cost, total weight, avg weight, and any other selected group(s): Acct Name, Bill Type, Service, Residential/ Commercial, and/or Zone *This report can be executed by Ship Date or Invoice Date.*
Groups shipments by account, bill type, service, res/com, zone, and date. *This report can be executed by Ship Date or Invoice Date.*

OPTIMIZATION REPORTS

Dimensional Analytics
Detailed dimensional look into packages and surcharges that are applied because of size. This report is customizable by length, width, height, cubic inch volume, and length + girth measurements. This report displays customer name, division, carrier, SCAC, invoice #, bill date, acct #, acct name, tracking #, zone, service, bill option, billed weight diff, ship date, pkg length, pkg width, pkg height, pkg cubic, pkg girth, ship from name, ship from company, ship from address/ city/state/zip/country, ship-to name, ship-to company, ship-to address/city/state/zip/country, and reference fields. *This report is executed by Invoice Date.*

Dimensional Statistics
Provides statistical data for your packages including total and average length, width, height, and girth. The report displays the customer, division, acct #, # of packages, total length, avg length, total width, avg width, total height, avg height, total girth, avg girth, total cubic inches, and avg cubic inches. *This report is executed by Invoice Date.*

Package Optimization
This report summarizes and provides detail for air shipments with the potential to decrease cost by being shipped ground. The first tab offers a summary (of division, acct #, acct name, carrier, # of packages, net charge, ground amount, savings amount, and weight); the second tab shows details. *This report is executed by Invoice Date.*

Shipment Unification
A consolidation report that shows potential savings when multiple packages are shipped in one box instead of shipping multiple packages to the same destination on the same day. The first tab offers a summary (of acct #, carrier, # of packages, weight, net charge, consolidated amount, and savings amount); the second tab shows details. *This report is executed by Invoice Date.*

Weight Analysis Detail
This report provides an analysis of package cost, package count, and total weight per weight group. It shows division, carrier, weight group, amount, total packages, total weight, amount per package, weight per package, and charges per package. *This report is executed by Ship Date.*

Shipment Trending
A divisional breakdown of total packages per day, per carrier, and per account. Displays division, carrier, account # (to include the shipper's name and location), total packages, and the breakdown per date selected. *This report is executed by Ship Date.*

© 2023 Transportation Insight | All rights reserved.

Report Descriptions | **ADVANCED VISIBILITY & MAINTENANCE**

Advanced Visibility is only available for clients with tracking data for FedEx and UPS. TI must have EDI 214/240 tracking data for these reports.

Invoice Status Definitions

ADVANCED VISIBILITY

Advanced Shipment
This report provides visibility into the movement of a package once it has been manifested. It displays total packages per account that have had either (1) no movement, (2) are in transit, (3) have been delivered, and (4) total packages per day. *This report is executed by Ship Date.*

Cost Visibility Summary
This report displays the Billed / Estimated cost and number of packages per account per service for a given time period. View what is (1) Shipped, Billed, Closed in System, (2) Shipped, Billed, Open in System, (3) Shipped, NOT Billed, *estimated cost, and (4) Label Created – No Movement *estimated cost. *This report is executed by Ship Date.*

Daily Carrier / Delivery Metrics
This report provides data on the number of shipments that are shipped on time or late. Additionally, a breakdown by delivery date is provided. You can select All Carriers or one at a time. *This report is executed by Ship Date.*

Daily Carrier / Operational Metrics
This report provides data on packages released to the carrier on the same day as manifested. It displays the carrier, account #, account name, manifest date, total packages shipped, % of packages shipped on time, actual # of packages shipped on time, and the number of packages shipped late. *This report is executed by Manifest Date.*

Forecast
This is an ad-hoc freight cost forecasting module that utilizes previous years' full results and current year YTD.

Rescheduled Shipment Summary
This report identifies any shipments that were rescheduled by the carrier and delivered after the original expected date. Displays carrier, acct #, package ship date and carrier expected date of delivery along with the rescheduled date and actual delivery date. *This report is executed by Ship Date.*

MAINTENANCE

Account List
This report lists all approved and unapproved shipper accounts and shows acct #, acct name, carrier, division code, address, city, state, zip, default GL code, invalid start date, invalid end date, and inject date.

Service Fee Only Accounts
This report provides a list of accounts that only received service fees on the invoices or had no charges at all on the invoices. View the carrier, acct #, shipper name, division, address, city, state, zip, comments, # of invoices, charges, accept fees, last occurrence, and date account was added. *This report is executed by Invoice Date.*

INVOICE STATUS DEFINITIONS

Open invoices
Invoices that have been received and loaded into our system.

Audited Invoices
Invoices that have gone through the systems audit process.

Closed Invoices
Invoices that have gone through the systems audit process and have been closed out and sent to the client to pay the carrier.

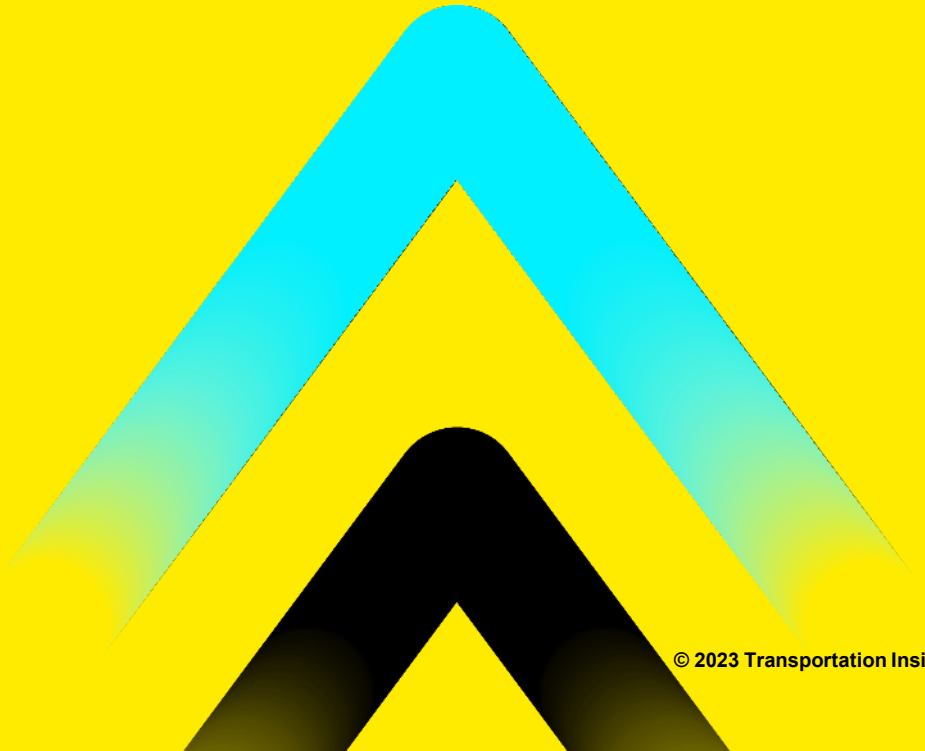
© 2023 Transportation Insight | All rights reserved.

Thank you.

This user guide provides specific support to multiple sections of FEMS, excluding Reports.

For support regarding Reports in FEMS, please reference ***Beon User Guides Reports****.*

For additional assistance please contact your Account Manager.



© 2023 Transportation Insight | All rights reserved.