



beon Insight

Freight Expense Management System

Report Specific | User Guide

February 2023

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FEMS Report Specific User Guide

**This user guide provides specific support to the
REPORT sections of FEMS.**

For additional support in other areas of FEMS, please reference:
Beon Insight FEMS General User Guide.

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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.

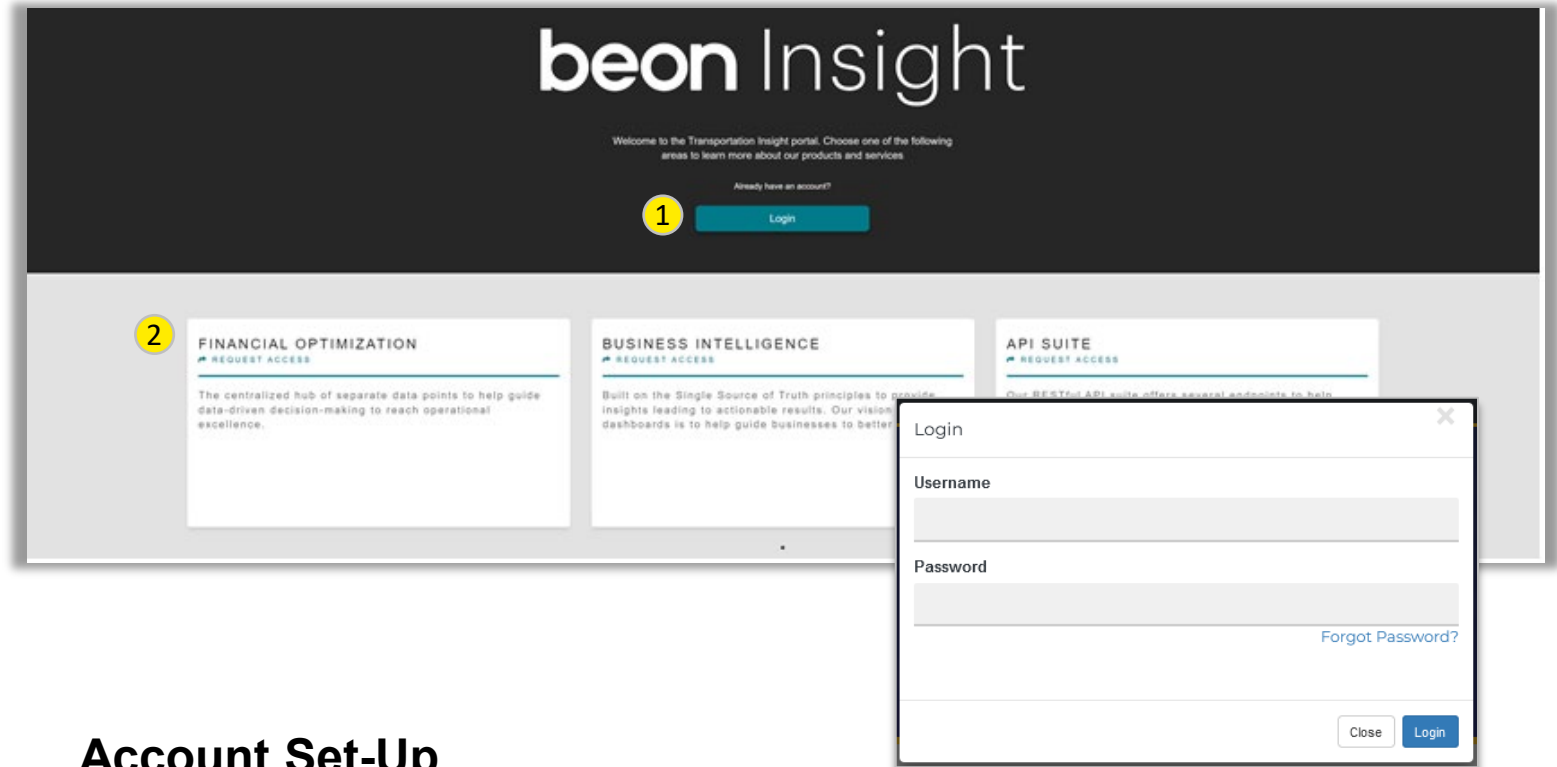
Login Instructions

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.

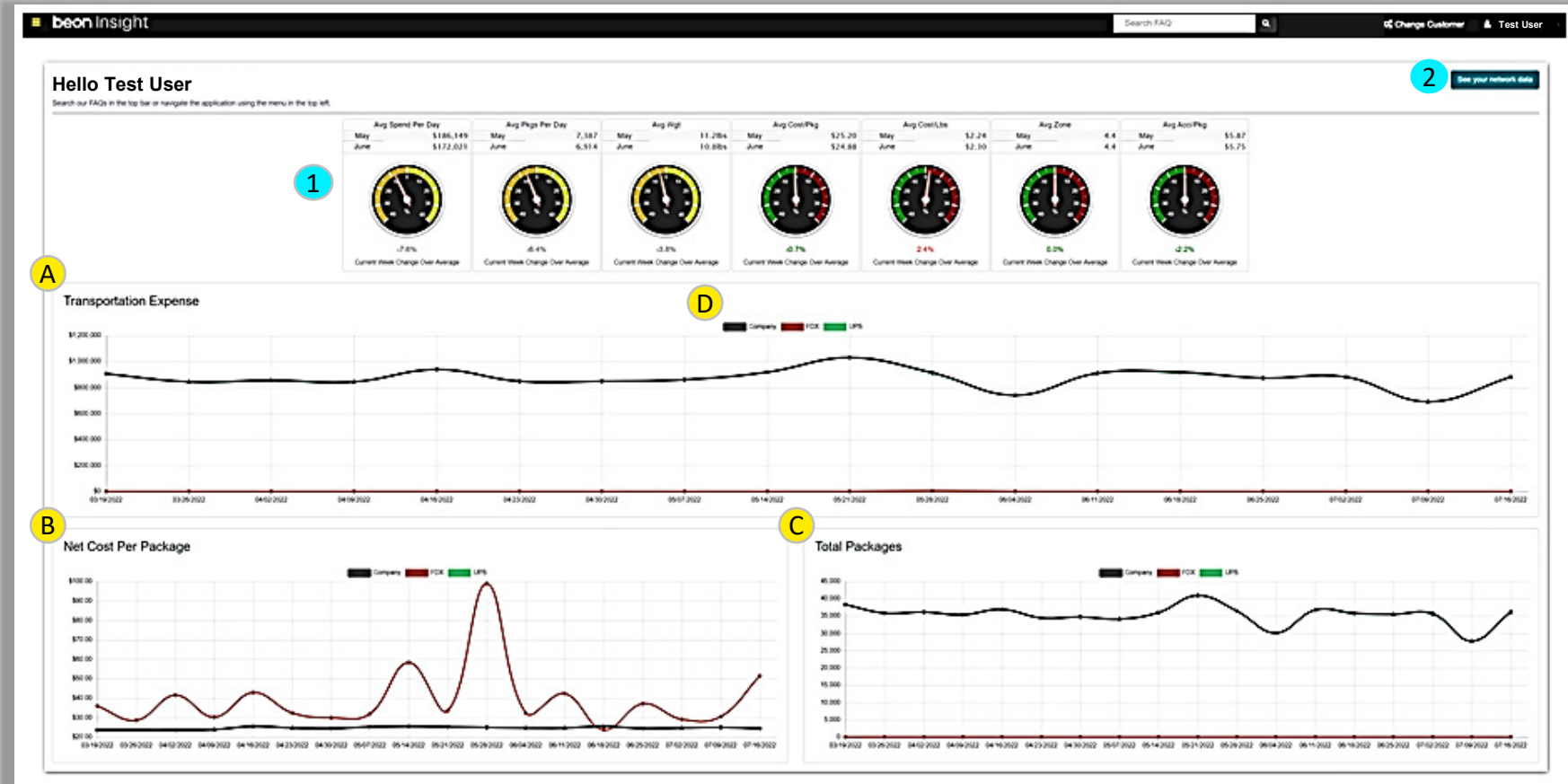
Landing Page | Settings and Features

Data Features:

- 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.
- See your Network Data** - Client access to customized Metropolitan Statistical Area (MSA) data.

Quick Monthly View of Expenses at these Charts:

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



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

The screenshot shows the beon Insight dashboard interface. At the top left, there is a navigation menu icon (three horizontal lines) and the text "beon Insight". Below this is a search bar labeled "Tracking / Invoice #" with a magnifying glass icon. The main dashboard area contains several charts and gauges. A red box highlights the navigation menu icon, and a blue box highlights the search bar. A text box at the bottom right of the dashboard contains the following text:

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

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).



FAQ Search Results

Address Corrections Provides list of all address corrections recorded by carrier. Summarizes by acct # on first tab. The third tab is for 'Flagged Address Corrections'. This report can be executed by Ship Date or Invoice Date. Open	Address Look Up Search for account address to view activity for that location. Open	Address Profile This report provides a profile of desired address. Open	Carrier Charge Detail Generates detailed reports for all accessorial. This report can be executed by Ship Date or Invoice Date. Open
Carrier Charges Summarizes all carrier charges by accessorial. This report can be executed by Ship Date or Invoice Date. Open	List of Invoices Generates report that shows which invoices have been paid by paid date. This report can be executed by Invoice Date or Paid Date. Open	Package Level Detail Provides package level detail by carrier. This report can be executed by Ship Date, Invoice Date, or Paid Date. Open	Returned Shipments Generates list of invoices that had packages which were returned. This report is executed by Ship Date. Open
Shipment Charge Trend Summary This report displays total charges for all accessories per carrier. Data is grouped by week ending rolled up by month. This report can be executed by Ship Date or Invoice Date. Open	Shipment Status Summary Summarizes the count of your shipments by package category (submitted, in transit/not delivered, damaged/returned, manifested not shipped, on time, or late). This report is executed by Ship Date. Open		

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.

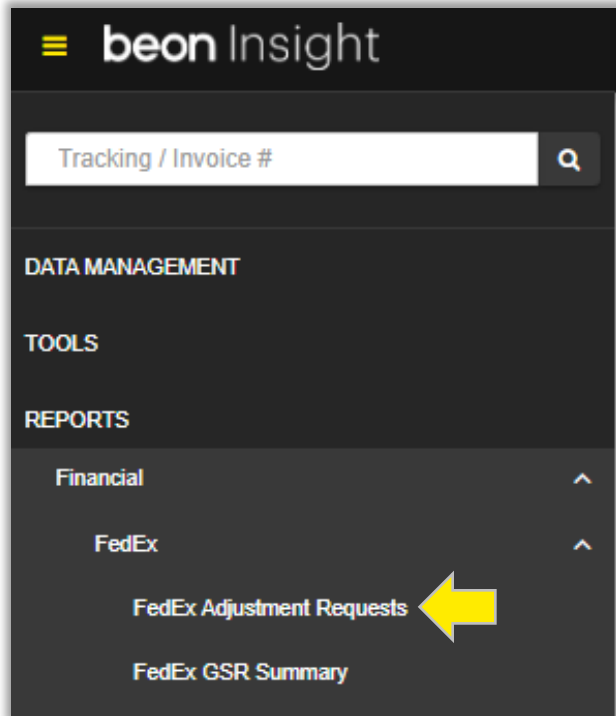
Tracking Number Quick Search Results include Financial Info, Delivery Info, Sender/Destination Info, Shipment Info, and Reference Info.

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

The screenshot shows the beon Insight dashboard interface. At the top left, there is a hamburger menu icon (three horizontal lines) which is highlighted by a yellow arrow. Below this icon is a search bar labeled "Tracking / Invoice #". A yellow arrow points from the text in the first box to this search bar. Below the search bar is a dropdown menu with the following options: DATA MANAGEMENT, TOOLS, REPORTS, AUTOMATIC REPORTS, INVOICES, OTHER APPS, and MAINTENANCE. A yellow arrow points from the text in the second box to the search bar. The dashboard background shows various charts and data points, including a "Transportation Expense" line chart and a "Net Cost Per Package" line chart. The top of the dashboard displays "Hello Test User" and a search bar.

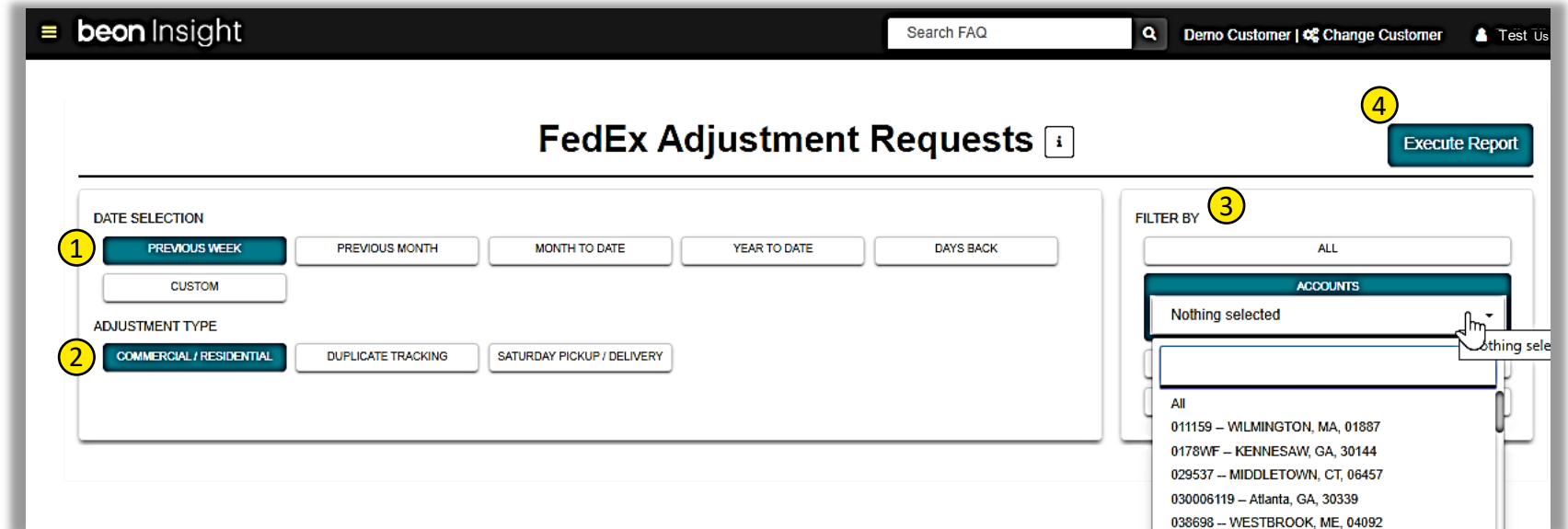
On any page, click on the three lines at the top left corner for the dropdown menu.

REPORTS | Financial > FedEx > FedEx Adjustment Requests and Results

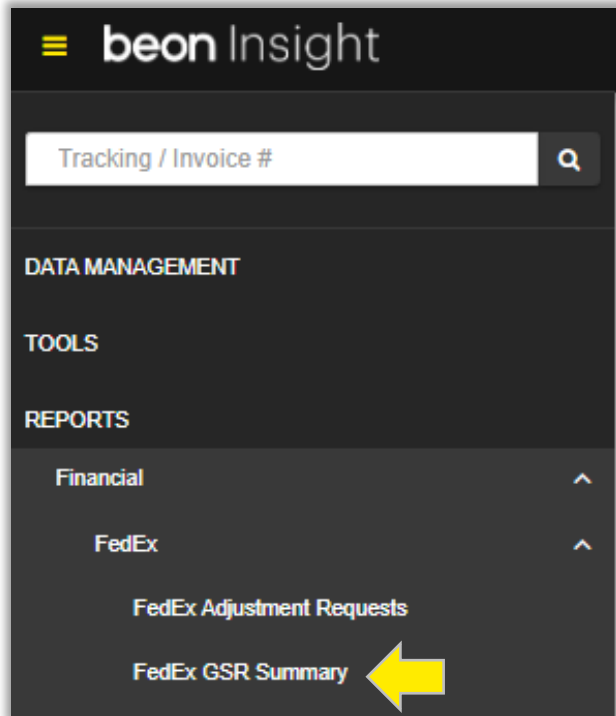


Generate a list of FedEx adjustments requested for Commercial / Residential, Duplicate tracking, or Saturday Pickup/ Delivery.

1. Make a Date Selection (including custom dates)
2. Select Adjustment Type
3. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
4. Execute Report to generate a report on-screen or in email.

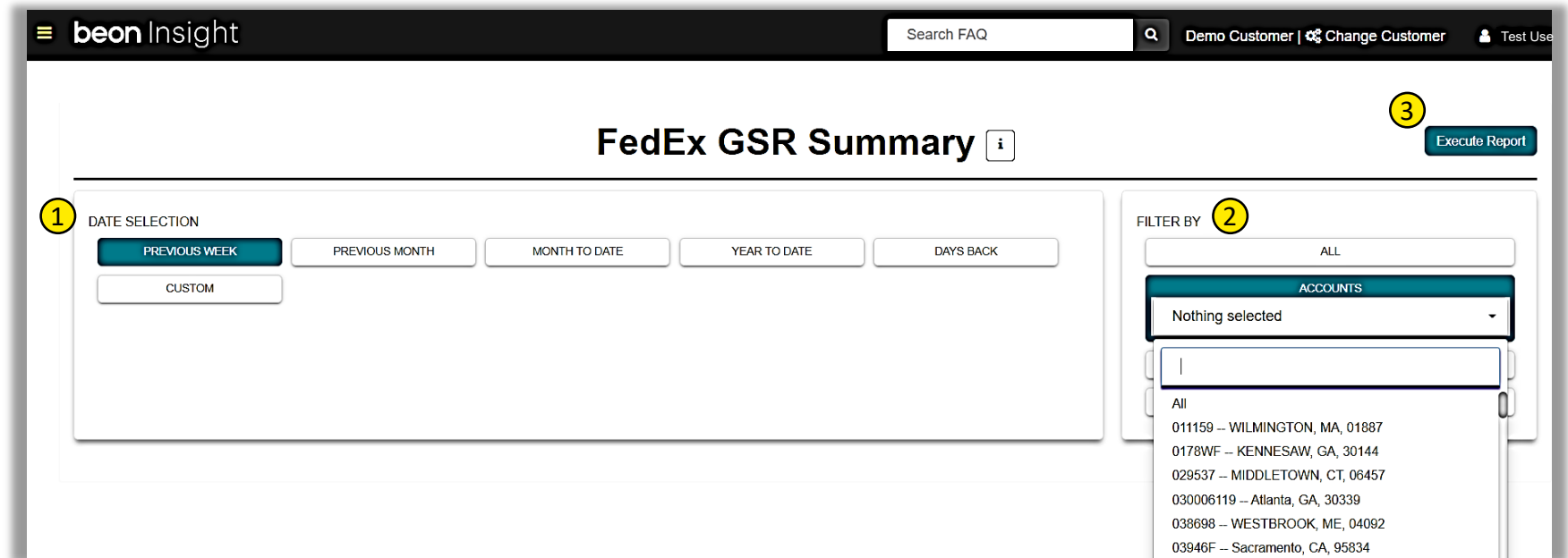


REPORTS | Financial > FedEx > FedEx GSR Summary

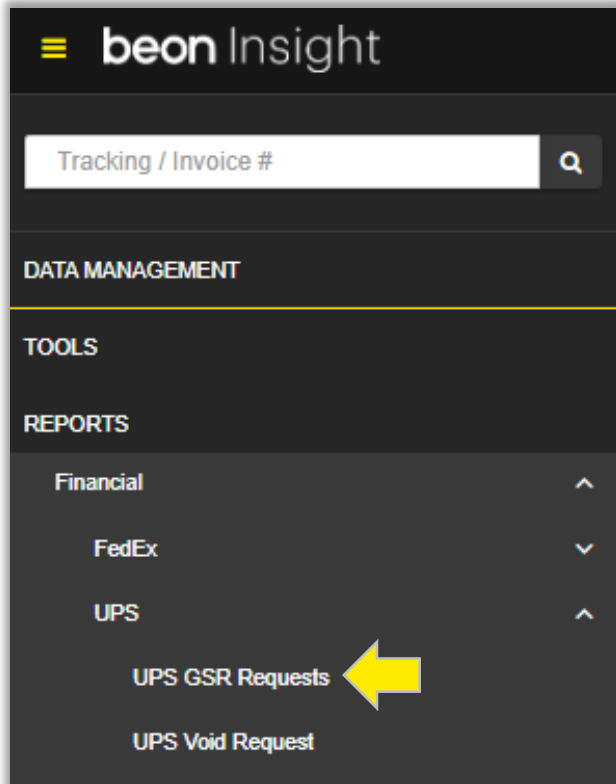


Generate a list of all GSR eligible packages approved or denied per account number.

1. Make a Date Selection (including custom dates)
2. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
3. Execute Report to generate a report on-screen or in email.

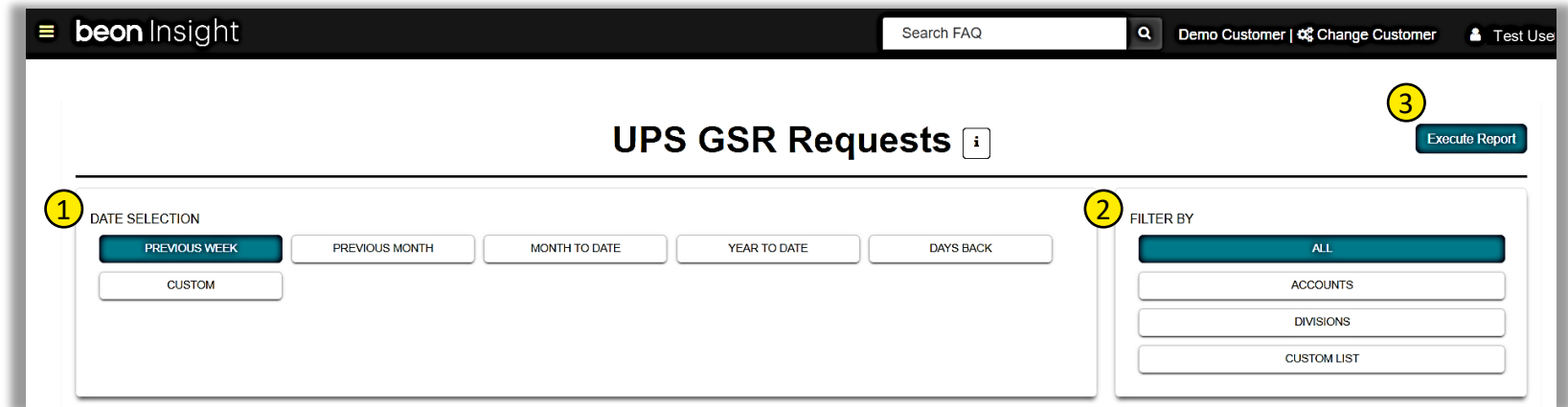


REPORTS | Financial > UPS > UPS GSR Requests

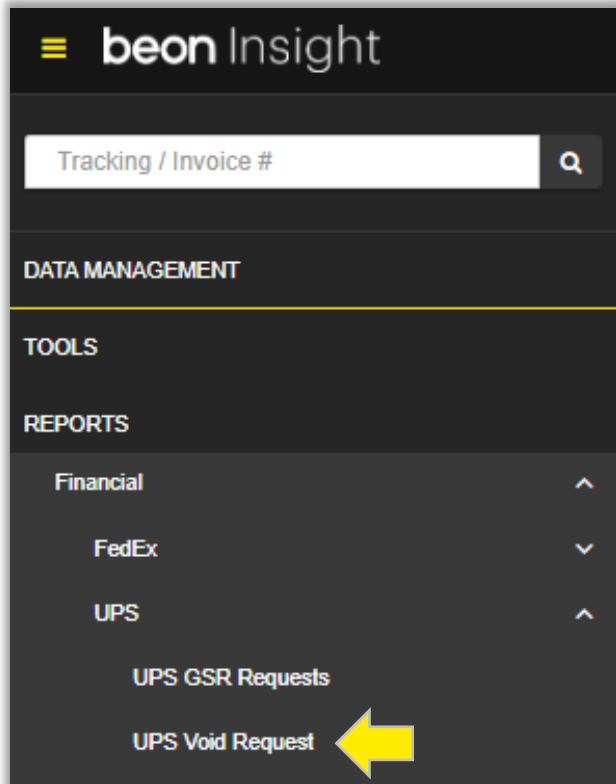


Displays all requested UPS GSRs (successful and denied) that have been requested to UPS. Executed by pickup date.

1. Make a Date Selection (including custom dates)
2. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
3. Execute Report to generate a report on-screen or in email.

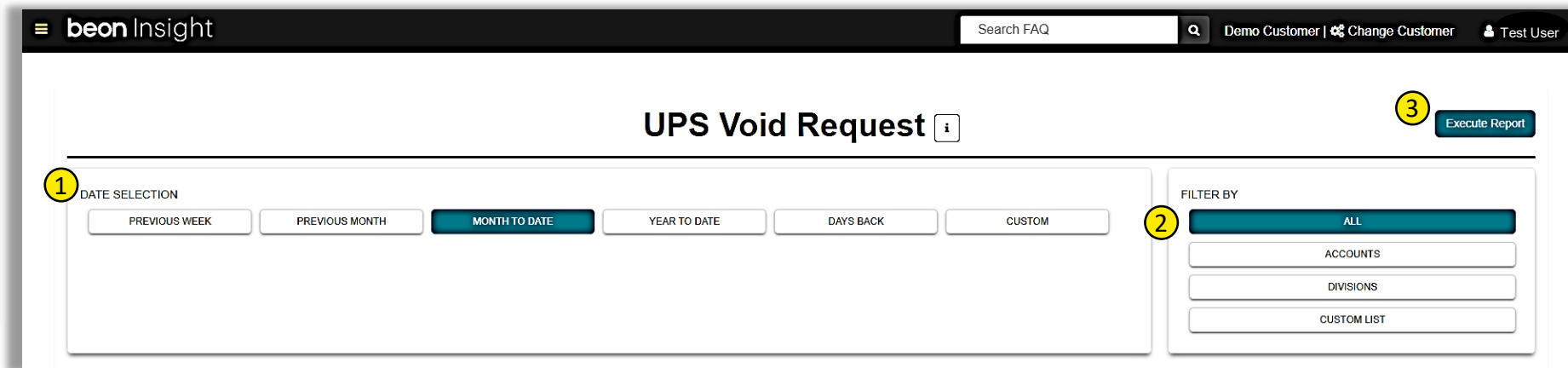


REPORTS | Financial > UPS > UPS Void Request

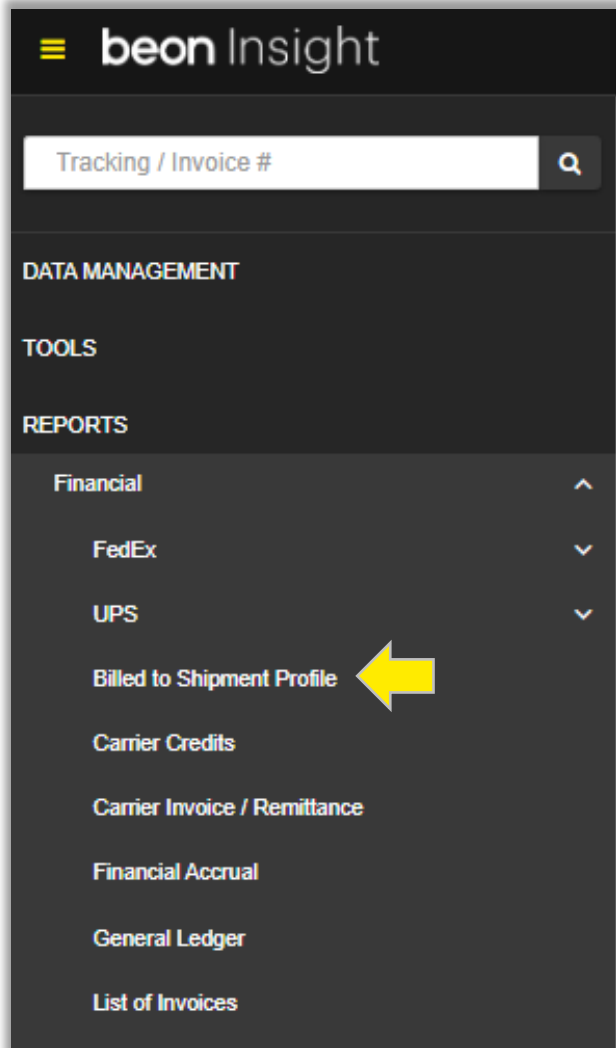


Provides a list of packages that were manifested but never shipped. This report is sent weekly to UPS Customer Service from TI.

1. Make a Date Selection (including custom dates)
2. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
3. Execute Report to generate a report on-screen or in email.

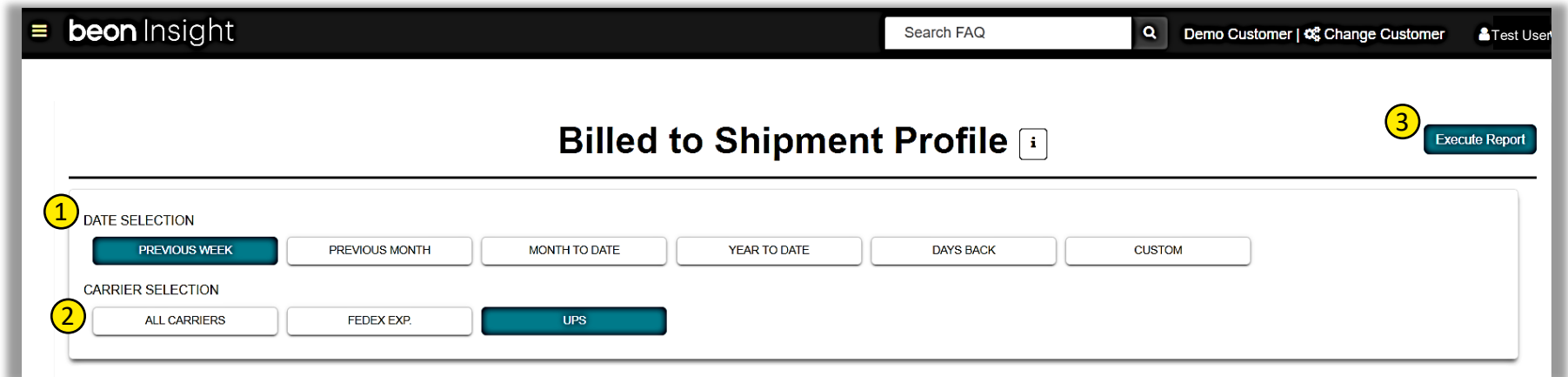


REPORTS | Financial > Billed to Shipment Profile

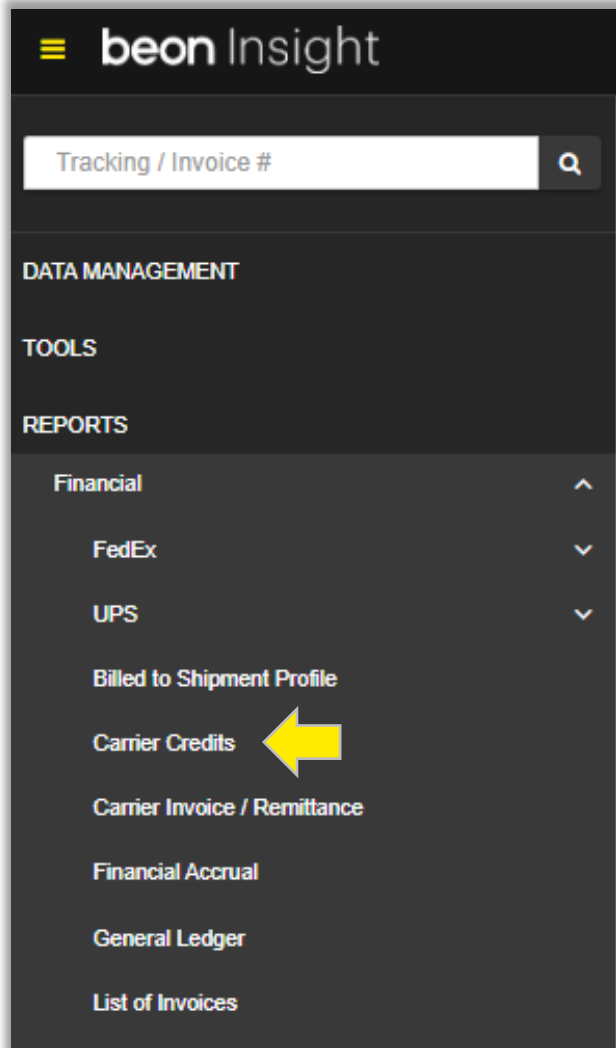


Shows when packages are billed and summarized by when they were shipped. Executed by Invoice Date.

1. Make a Date Selection (including custom dates)
2. Make a Carrier Selection.
3. Execute Report to generate a report on-screen or in email.

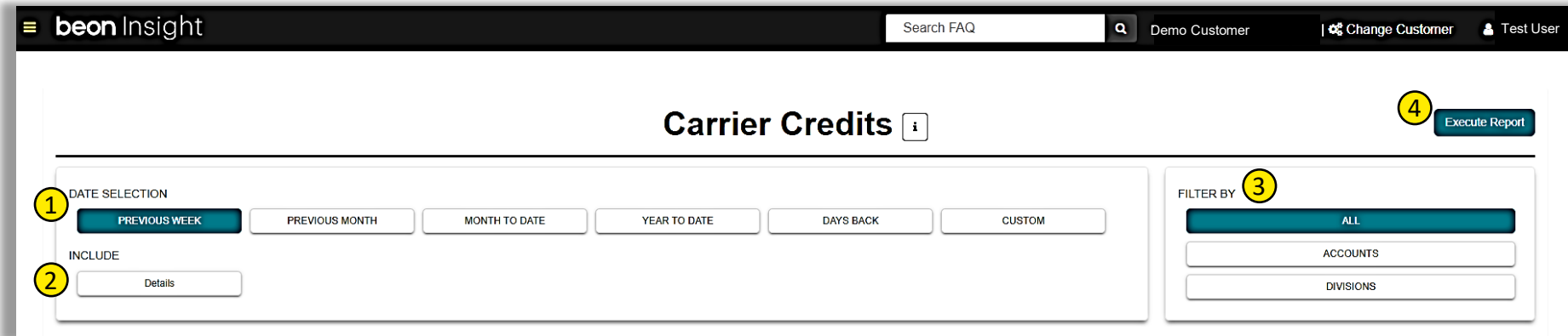


REPORTS | Financial > Carrier Credits

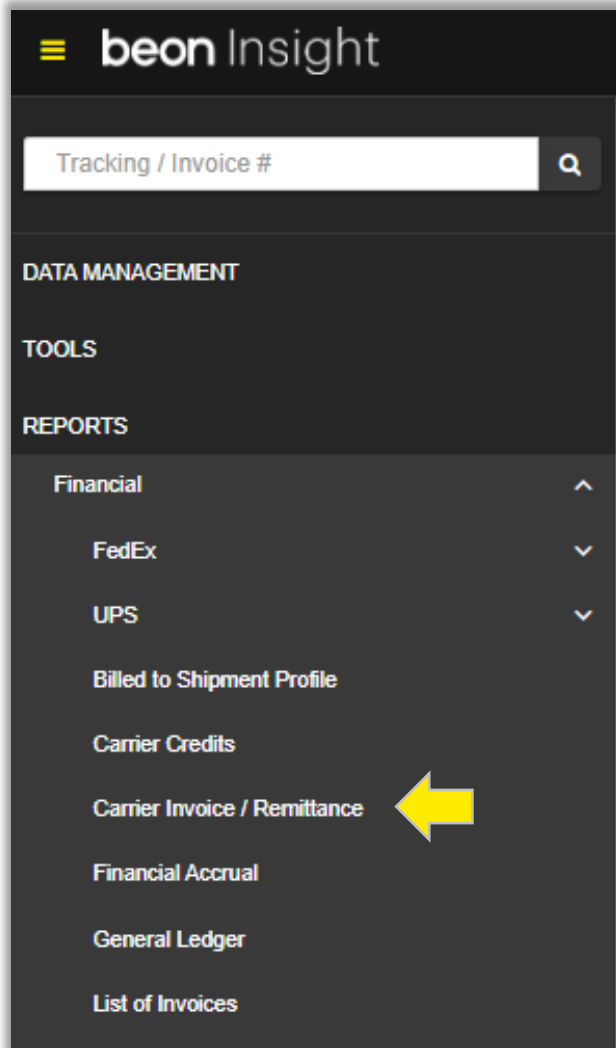


Provides a summary and detailed date of actual credits that the carrier has already credited to customer for a time period. Executed by Invoice Date.

1. Make a Date Selection (including custom dates)
2. At Include Select / Deselect Details
3. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
4. Execute Report to generate a report on-screen or in email.



REPORTS | Financial > Carrier Invoice / Remittance



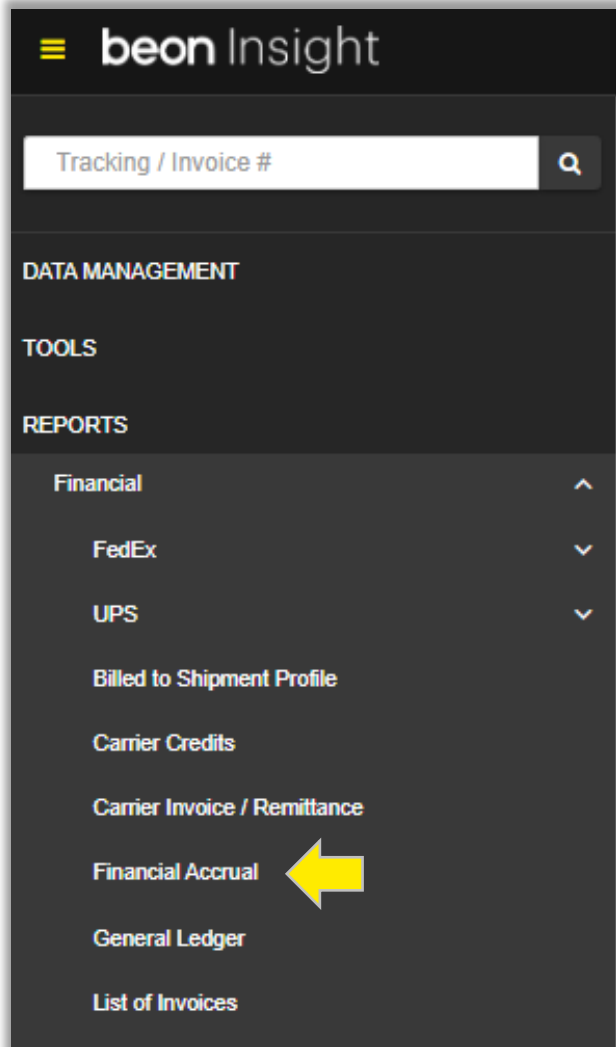
Summary of carrier remittance for closed invoices. Differentiated by account # and invoice #. May be executed by Invoice Date or Paid Date.

1. Make a Date Selection (including custom dates)
2. Select a Carrier
 - a. Option to search by Control / Check Number
3. Select Date Range Type Invoice Date or Paid Date
4. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
5. Execute Report to generate a report on-screen or in email.

The screenshot shows the 'Carrier Invoice / Remittance' configuration page. It features a search bar at the top right with 'Search FAQ' and user information 'Demo Customer | Change Customer | Test User'. The main title is 'Carrier Invoice / Remittance' with an information icon and a yellow callout '5' next to an 'Execute Report' button. The configuration area is divided into several sections:

- 1 DATE SELECTION:** Includes buttons for 'PREVIOUS WEEK', 'PREVIOUS MONTH', 'MONTH TO DATE', 'YEAR TO DATE', 'DAYS BACK', and 'CUSTOM'.
- 2 CARRIER SELECTION:** Includes buttons for 'ALL CARRIERS', 'FEDEX EXP.', and 'UPS'.
- a CONTROL / CHECK NUM:** A text input field.
- 3 DATE RANGE TYPE:** Includes buttons for 'INVOICE DATE' and 'PAID DATE'.
- 4 FILTER BY:** Includes a dropdown menu with 'ALL', 'ACCOUNTS', 'DIVISIONS', and 'CUSTOM LIST'.

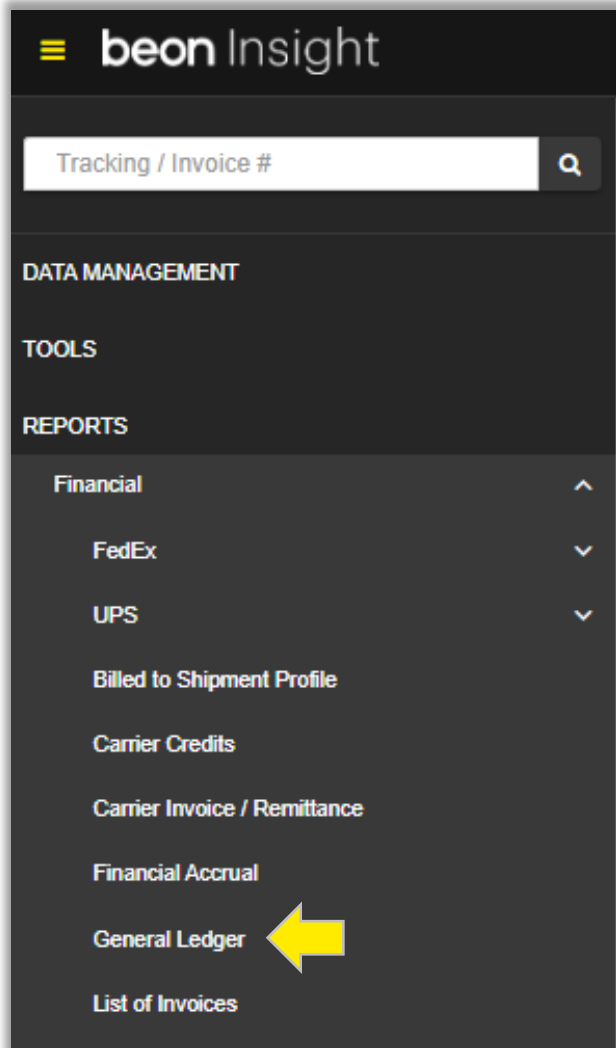
REPORTS | Financial > Financial Accrual



Summarizes transaction count and net amount of shipments by GL code, invoice number or single line total. This report can be executed by Ship Date or Invoice Date

1. Make a Date Selection (including custom dates)
2. Select a Carrier
3. Select Output Type Single Total Line, Group by GL Code, or Group by Invoice.
4. Select Date Range Type Ship Date or Invoice Date or Paid Date
5. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
6. Execute Report to generate a report on-screen or in email.

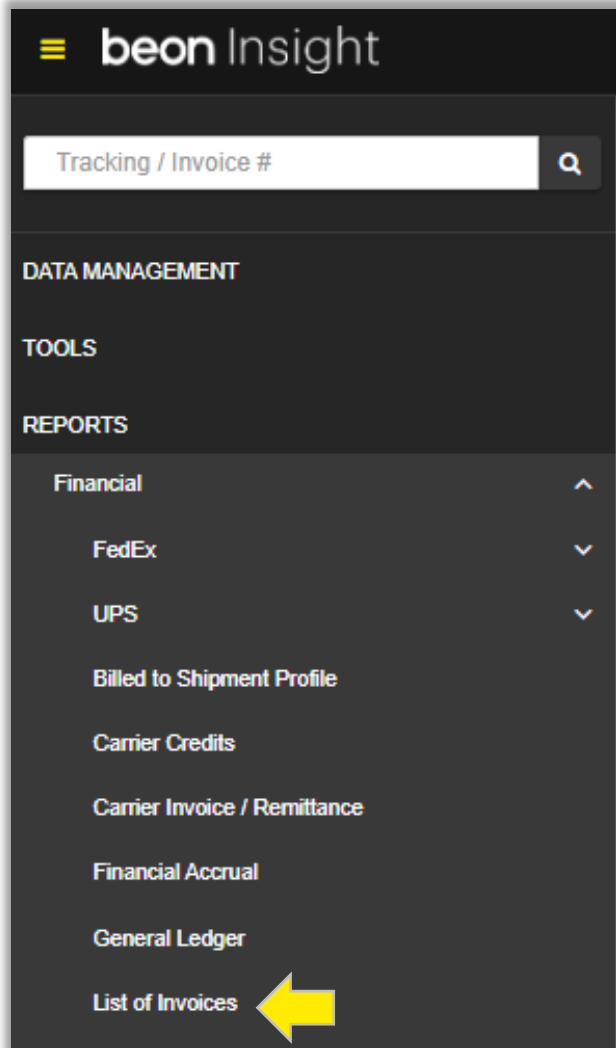
REPORTS | Financial > General Ledger



Displays GL code with package and transaction count. This report can be executed by Ship Date, Invoice Date, or Paid Date.

1. Make a Date Selection (including custom dates)
2. Select a Carrier
3. Select Invoice Statuses.
4. Select Date Range Type Ship Date, Invoice Date or Paid Date.
 - a. (Optional) Search by GL Account.
5. Select a Custom Category.
6. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
7. Execute Report to generate a report on-screen or in email.

REPORTS | Financial > List of Invoices



Generates report that shows which invoices have been paid by paid date. This report can be executed by Invoice Date or Paid Date.

1. Make a Date Selection (including custom dates)
2. Select a Carrier
3. Select Invoice Statuses.
4. Select Date Range Type Invoice Date or Paid Date.
 - a.(Optional) Search by Control / Check Number.
5. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
6. Execute Report to generate a report on-screen or in email.

The screenshot shows the 'List of Invoices' configuration page in beon Insight. The page title is 'List of Invoices' with an information icon. The top right corner shows 'Demo Customer | Change Customer' and 'Test User'. The main content area is divided into several sections, each with a numbered callout:

- 1 DATE SELECTION:** Includes buttons for 'PREVIOUS WEEK', 'PREVIOUS MONTH', 'MONTH TO DATE', 'YEAR TO DATE', 'DAYS BACK', and 'CUSTOM'.
- 2 CARRIER SELECTION:** Includes a dropdown menu for 'FEDEX EXP.' and a button for 'UPS'.
- 3 INVOICE STATUSES:** Includes buttons for 'IN PROGRESS', 'AUDITED', and 'PAID'.
- 4 DATE RANGE TYPE:** Includes buttons for 'INVOICE DATE' and 'PAID DATE'.
- a CONTROL / CHECK NUM:** Includes a text input field.
- 5 FILTER BY:** Includes a dropdown menu for 'ALL' and buttons for 'ACCOUNTS', 'DIVISIONS', and 'CUSTOM LIST'.
- 6 Execute Report:** A button in the top right corner.

REPORTS | Financial Metrics > Cost Drivers By Location

beon Insight

Tracking / Invoice #

DATA MANAGEMENT

TOOLS

REPORTS

- Financial
- Financial Metrics
 - Cost Drivers By Location
 - Financial Performance
 - Invoice Metric
 - Invoice - Ship / Delivery / Pay
 - Parcel Spend Trending
 - Parcel Trend Overview
 - Shipment Charge Trend Summary
 - Spend By Ship / Invoice Date
 - Late Payment Fee Detail

Provides breakdown of cost by accessorials, fuel, service, weight, and zone per division. This report is executed by Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select a Date Range.
4. Select a Custom Category (not available with all carriers).
5. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
6. Execute Report to generate a report on-screen or in email.

beon Insight

Search FAQ

Demo Customer | Change Customer | Test User

Cost Drivers By Location

Execute Report

1 DATE SELECTION

PREVIOUS WEEK PREVIOUS MONTH MONTH TO DATE YEAR TO DATE DAYS BACK CUSTOM

2 CARRIER SELECTION

ALL CARRIERS FEDEX EXP. UPS

3 DATE RANGE BY

WEEK MONTH

4 CUSTOM CATEGORY

All Categories NXP Shipments Outbound DC

5 FILTER BY

ALL

ACCOUNTS

DIVISIONS

CUSTOM LIST

REPORTS | Financial Metrics > Financial Performance

beon Insight

Tracking / Invoice #

DATA MANAGEMENT

TOOLS

REPORTS

- Financial
- Financial Metrics
 - Cost Drivers By Location
 - Financial Performance
 - Invoice Metric
 - Invoice - Ship / Delivery / Pay
 - Parcel Spend Trending
 - Parcel Trend Overview
 - Shipment Charge Trend Summary
 - Spend By Ship / Invoice Date
 - Late Payment Fee Detail

This report displays total billed dollars for all accessorial categories by both month and week per carrier, per service. It breaks down each charge category and displays the # of total billed for each. You can select All Carriers or one at a time. When running for an individual carrier, you can view only Residential, only Commercial, or both. This report can be executed by Ship Date or Invoice Date.

1. Make a Date Selection (including custom dates)
2. Select a Carrier
3. Select a Date Range.
4. Select RES/COM or Both (not available with all carriers).
5. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
6. Execute Report to generate a report on-screen or in email.

beon Insight

Search FAQ

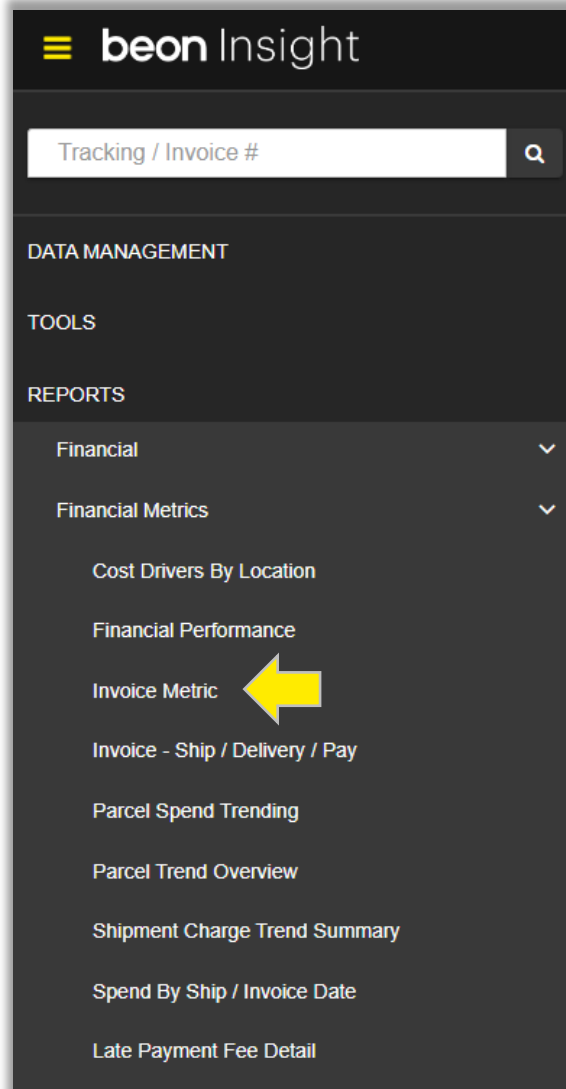
Demo Customer | Change Customer | Test User

Financial Performance

Execute Report

1. DATE SELECTION
 - PREVIOUS WEEK
 - PREVIOUS MONTH
 - MONTH TO DATE
 - YEAR TO DATE
 - DAYS BACK
 - CUSTOM
2. CARRIER SELECTION
 - ALL CARRIERS
 - FEDEX EXP.
 - UPS
3. DATE RANGE TYPE
 - SHIP DATE
 - INVOICE DATE
4. RES/COM SELECTION
 - BOTH
 - RESIDENTIAL
 - COMMERCIAL
5. FILTER BY
 - ALL
 - ACCOUNTS
 - DIVISIONS
 - CUSTOM LIST
6. Execute Report

REPORTS | Financial Metrics > Invoice Metric



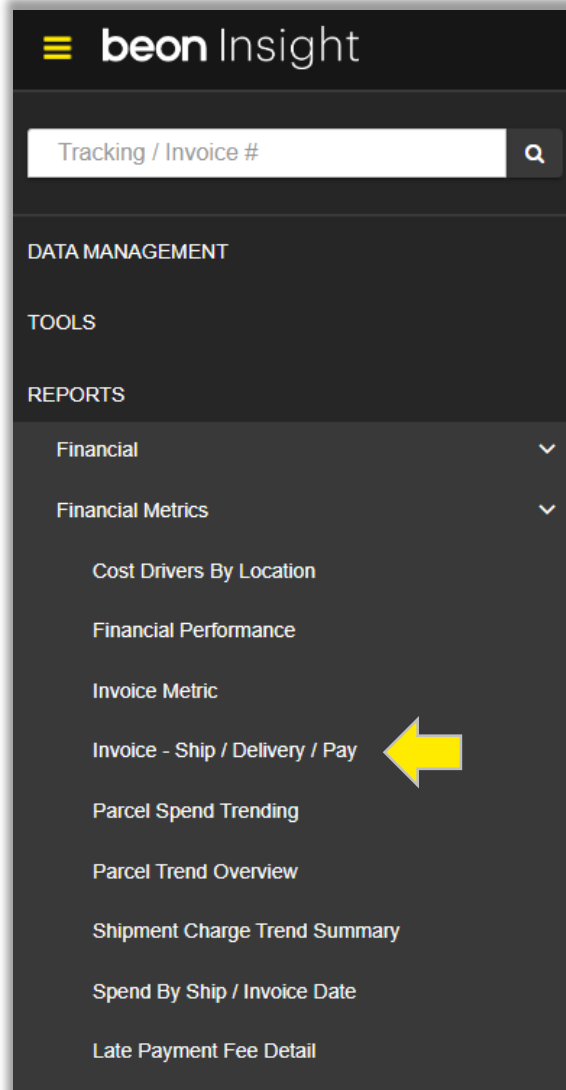
Provides list of invoice metrics including weight, package count, cost, avg weight, and avg cost. This report can be executed by Ship Date, Delivery Date, or Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Date Range.
3. Select a Carrier.
4. Select RES/COM or Both (not available with all carriers).
 - a. (Optional) Additionally include Account Number
5. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
6. Execute Report to generate a report on-screen or in email.

The 'Invoice Metric' configuration page includes the following sections:

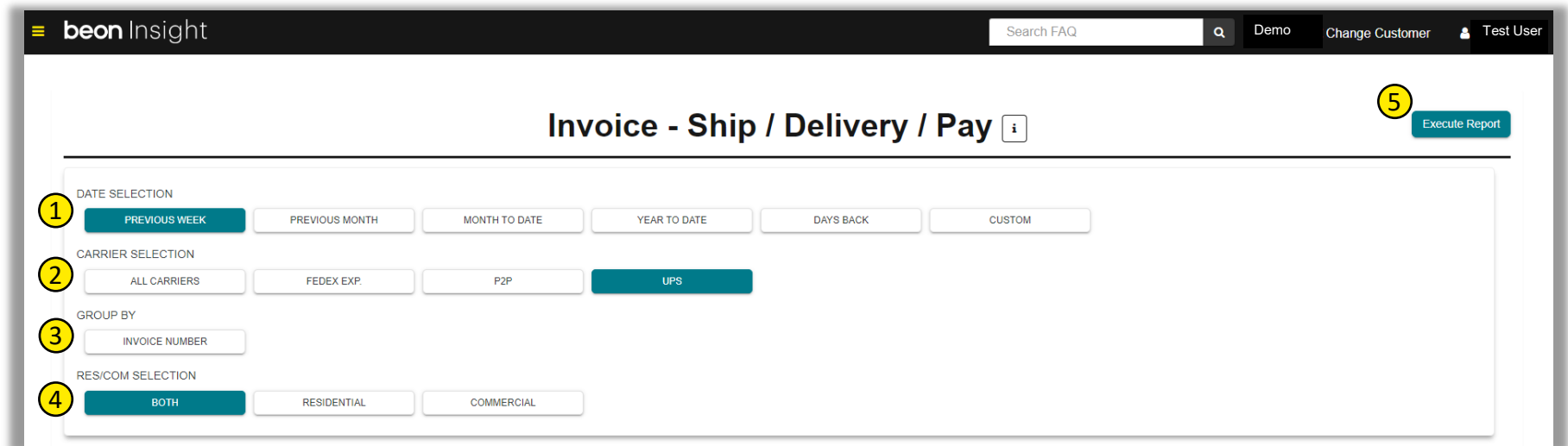
- 1 DATE SELECTION:** PREVIOUS WEEK, PREVIOUS MONTH, MONTH TO DATE, YEAR TO DATE, DAYS BACK, CUSTOM
- 2 DATE RANGE BY:** INVOICE DATE, SHIP DATE, DELIVERY DATE
- 3 CARRIER SELECTION:** ALL CARRIERS, FEDEX EXP., UPS
- 4 RES/COM SELECTION:** BOTH, RESIDENTIAL, COMMERCIAL
- a ADDITIONALLY INCLUDE:** ACCOUNT NUMBER
- 5 FILTER BY:** ALL, ACCOUNTS, DIVISIONS, CUSTOM LIST
- 6 Execute Report** button

REPORTS | Financial Metrics > Invoice – Ship / Delivery / Pay

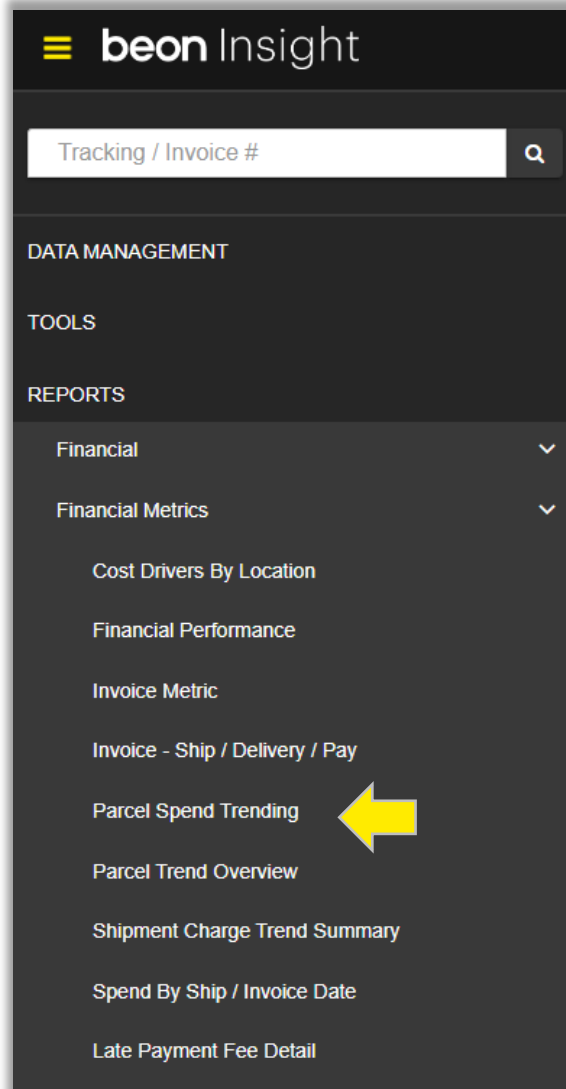


Shows when the packages invoiced during the date range were shipped, delivered and paid. *This report is executed by Invoice Date.*

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select or Deselect the option to Group By (Invoice Number).
4. Select RES/COM or Both (not available with all carriers).
 - a. (Optional) Additionally include Account Number
5. Execute Report to generate a report on-screen or in email.



REPORTS | Financial Metrics > Parcel Spend Trending



Discover trends; compare one date range with another to reveal spending by service, zone, and accessorials. This report is executed by Invoice Date.

1. Use the drop-down calendar to select the start and end dates for the first date range.
2. Use the drop-down calendar to select the start and end dates for the second date range.
3. Select a Carrier.
4. Select RES/COM or Both (not available with all carriers).
5. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
6. Execute Report to generate a report on-screen or in email.

Parcel Spend Trending

DATE SELECTION

1 Period 1 Start:

Period 1 End:

2 Period 2 Start:

Period 2 End:

3 CARRIER SELECTION

FEDEX EXP.

4 RES/COM SELECTION

5 FILTER BY

6

REPORTS | Financial Metrics > Parcel Trend Overview

beon Insight

Tracking / Invoice #

DATA MANAGEMENT

TOOLS

REPORTS

- Financial
- Financial Metrics
 - Cost Drivers By Location
 - Financial Performance
 - Invoice Metric
 - Invoice - Ship / Delivery / Pay
 - Parcel Spend Trending
 - Parcel Trend Overview
 - Shipment Charge Trend Summary
 - Spend By Ship / Invoice Date
 - Late Payment Fee Detail

View an overview of spending for a period of time separated by service, zone, and accessorials. This report is executed by Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select RES/COM or Both (not available with all carriers).
4. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
5. Execute Report to generate a report on-screen or in email.

beon Insight

Search FAQ

Demo Customer | Change Customer | Test User

Parcel Trend Overview

Execute Report

1 DATE SELECTION

PREVIOUS WEEK PREVIOUS MONTH MONTH TO DATE YEAR TO DATE DAYS BACK CUSTOM

2 CARRIER SELECTION

FEDEX EXP. UPS

3 RES/COM SELECTION

BOTH RESIDENTIAL COMMERCIAL

4 FILTER BY

ALL

ACCOUNTS

DIVISIONS

CUSTOM LIST

REPORTS | Financial Metrics > Shipment Charge Trend Summary

beon Insight

Tracking / Invoice #

DATA MANAGEMENT

TOOLS

REPORTS

- Financial
- Financial Metrics
 - Cost Drivers By Location
 - Financial Performance
 - Invoice Metric
 - Invoice - Ship / Delivery / Pay
 - Parcel Spend Trending
 - Parcel Trend Overview
 - Shipment Charge Trend Summary**
 - Spend By Ship / Invoice Date
 - Late Payment Fee Detail

View total charges for all accessorials by carrier; data is grouped by week ending rolled up by month. This report can be executed by Ship Date or Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select the Date Range Type.
4. Select RES/COM or Both (not available with all carriers).
5. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
6. Execute Report to generate a report on-screen or in email.

beon Insight

Search FAQ

Demo Customer | Change Customer | Test User

Shipment Charge Trend Summary

Execute Report

1 DATE SELECTION

PREVIOUS WEEK PREVIOUS MONTH MONTH TO DATE YEAR TO DATE DAYS BACK CUSTOM

2 CARRIER SELECTION

ALL CARRIERS FEDEX EXP. **UPS**

3 DATE RANGE TYPE

SHIP DATE INVOICE DATE

4 RES/COM SELECTION

BOTH RESIDENTIAL COMMERCIAL

5 FILTER BY

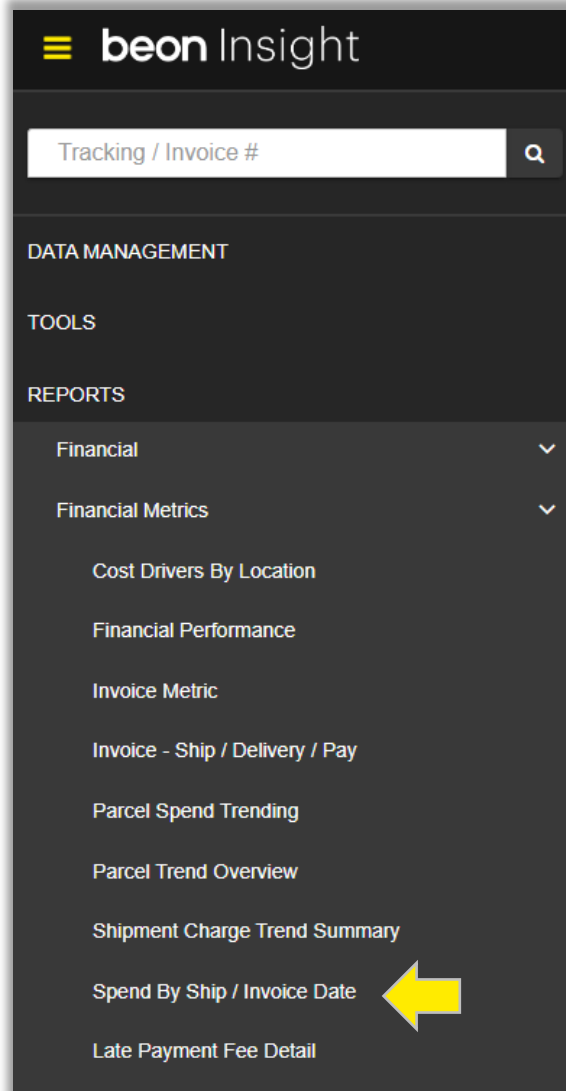
6 ALL

ACCOUNTS

DIVISIONS

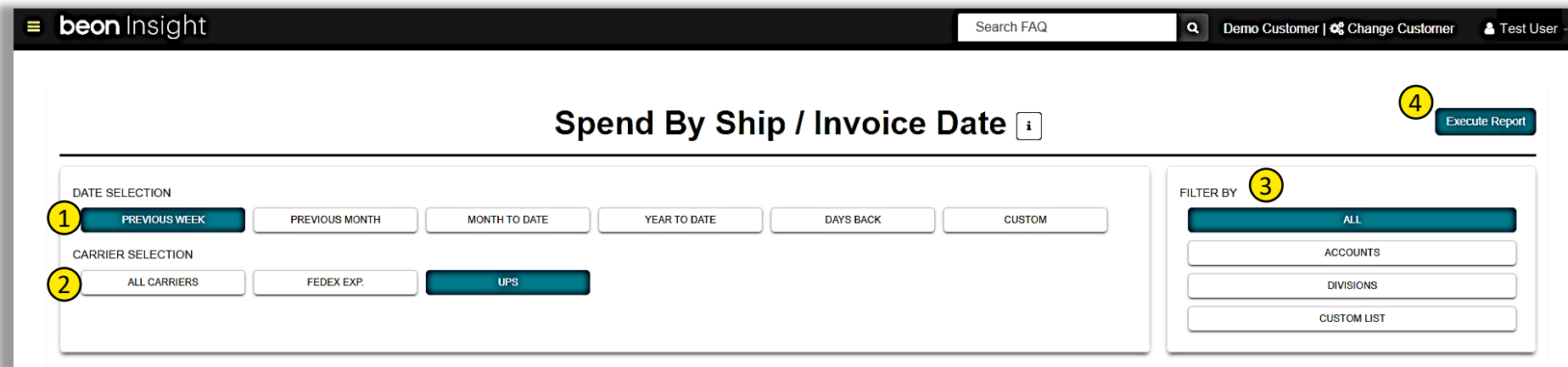
CUSTOM LIST

REPORTS | Financial Metrics> Spend by Ship / Invoice Date

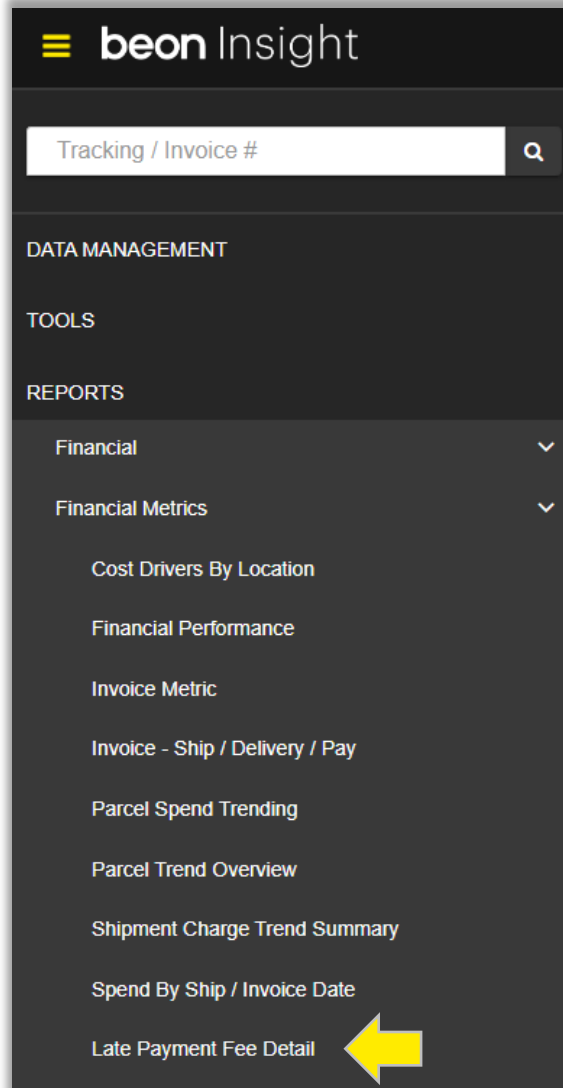


View transportation spend amounts by a given time period by Ship Date or Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
4. Execute Report to generate a report on-screen or in email.

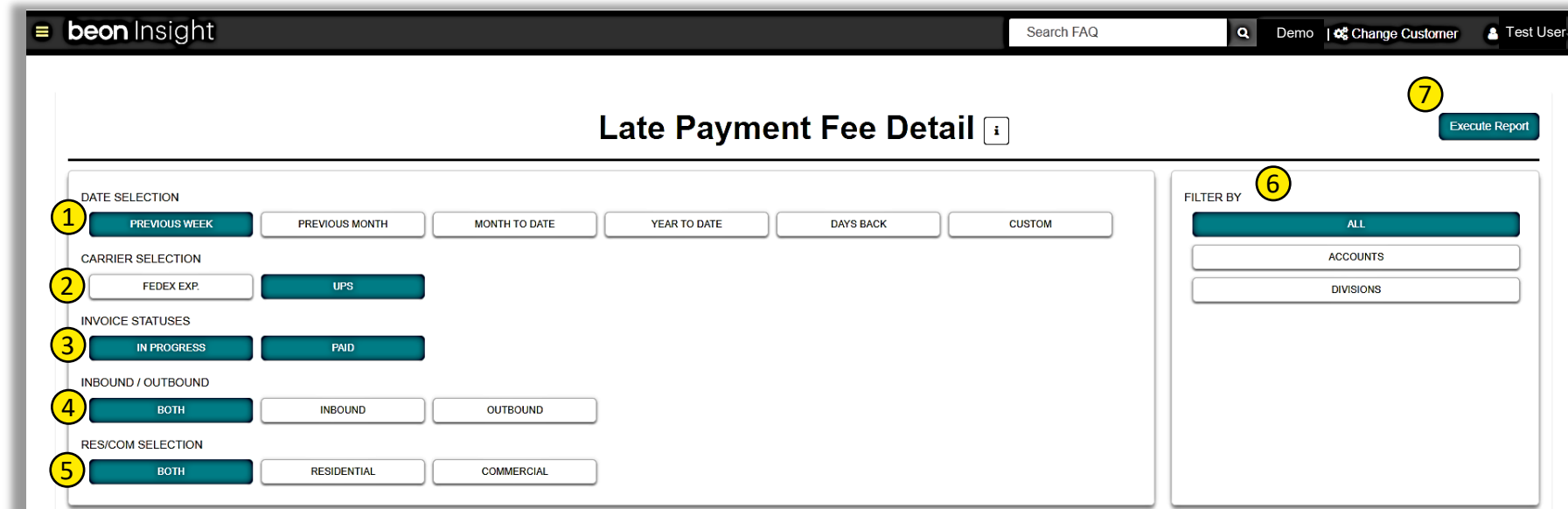


REPORTS | Financial Metrics > Late Payment Fee Detail

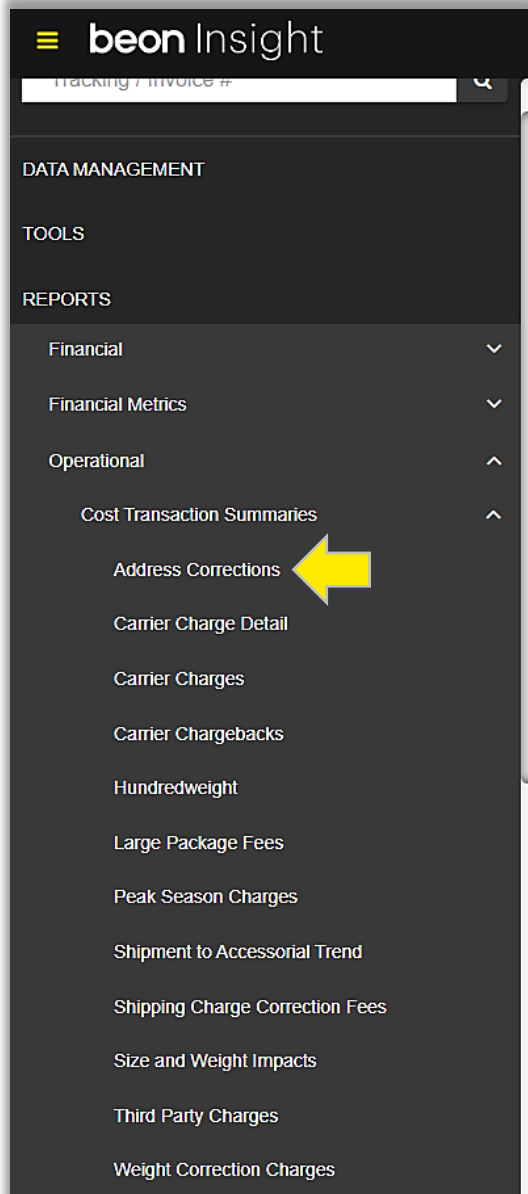


Provides original invoice details for any late payment fees applied from the carrier.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select Invoice Status (In Progress or Paid).
4. Select Inbound or Outbound or Both.
5. Select RES/COM or Both (not available with all carriers).
6. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
7. Execute Report to generate a report on-screen or in email.



REPORTS | Operational > Cost Transaction Summaries > Address Corrections

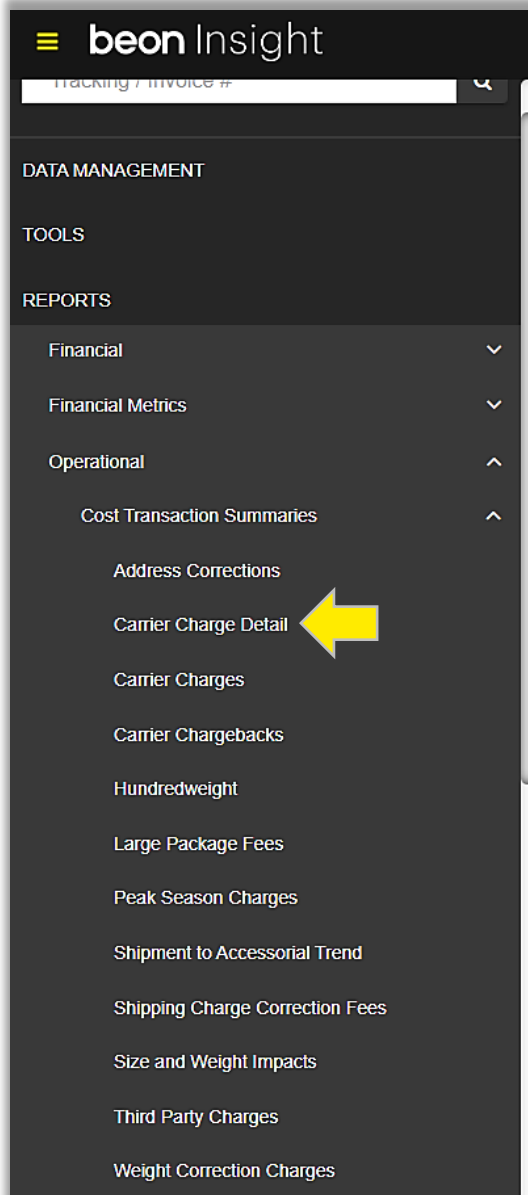


Provides a list of all address corrections recorded by carrier. Summarizes by acct # on first tab. The third tab is for 'Repeated Address Corrections.' This report can be executed by Ship Date or Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Date Type.
3. Select a Carrier.
4. Toggle between Custom Categories (*setup by request only*).
5. Select or Deselect Invoice Statuses.
6. Select INBOUND or OUTBOUND, or Both.
7. Select RESIDENTIAL or COMMERCIAL, or Both.
8. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
9. Execute Report to generate a report on-screen or in email.

The screenshot displays the 'Address Corrections' report configuration interface. The page title is 'Address Corrections' with an information icon. A search bar and user information are at the top right. The main content area is divided into two columns. The left column contains several filter sections, each with a numbered yellow circle: 1. DATE SELECTION: PREVIOUS WEEK, PREVIOUS MONTH, MONTH TO DATE, YEAR TO DATE, DAYS BACK, CUSTOM. 2. DATE TYPE: INVOICE DATE, SHIP DATE. 3. CARRIER SELECTION: FEDEX EXP., UPS. 4. CUSTOM CATEGORY: All Categories, NXP Shipments, Outbound DC. 5. INVOICE STATUSES: IN PROGRESS, PAID. 6. INBOUND / OUTBOUND: BOTH, INBOUND, OUTBOUND. 7. RES/COM SELECTION: BOTH, RESIDENTIAL, COMMERCIAL. The right column is labeled 'FILTER BY' with a numbered yellow circle 8, and contains three dropdown menus: ALL, ACCOUNTS, DIVISIONS, and CUSTOM LIST. A blue 'Execute Report' button with a numbered yellow circle 9 is located at the top right of the filter area.

REPORTS | Operational > Cost Transaction Summaries > Carrier Charge Detail



Generates detailed reports for all accessorials. This report can be executed by Ship Date or Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Date Type.
3. Select a Carrier.
4. Toggle between Custom Categories (*setup by request only*).
5. Select or Deselect Invoice Statuses.
6. Select INBOUND or OUTBOUND, or Both.
7. Select RESIDENTIAL or COMMERCIAL, or Both.
8. Choose Transactions Code(s) to be included in the report.
 - A. Use the Scroll Bar on right for additional options.
9. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
10. Execute Report to generate a report on-screen or in email.

The screenshot displays the 'Carrier Charge Detail' configuration page in the beon Insight application. The page is annotated with numbered callouts (1-10) and a letter 'A' pointing to a scroll bar. The configuration options are as follows:

- 1 DATE SELECTION:** PREVIOUS WEEK, PREVIOUS MONTH, MONTH TO DATE, YEAR TO DATE, DAYS BACK, CUSTOM
- 2 DATE TYPE:** INVOICE DATE, SHIP DATE
- 3 CARRIER SELECTION:** FEDEX EXP., UPS
- 4 CUSTOM CATEGORY:** All Categories, NXP Shipments, Outbound DC
- 5 INVOICE STATUSES:** IN PROGRESS, PAID
- 6 INBOUND / OUTBOUND:** BOTH, INBOUND, OUTBOUND
- 7 RES/COM SELECTION:** BOTH, RESIDENTIAL, COMMERCIAL
- 8 Choose the transaction code(s) to be included:**
 - Freight Discount
 - Freight Related
 - Fuel Surcharge
 - Additional Handling
- 9 FILTER BY:** ALL, ACCOUNTS, DIVISIONS, CUSTOM LIST
- 10 Execute Report:** Execute Report button
- A:** Scroll bar on the right side of the page.

REPORTS | Operational > Cost Transaction Summaries > Carrier Charges

beon Insight

Tracking / Invoice #

DATA MANAGEMENT

TOOLS

REPORTS

- Financial
- Financial Metrics
- Operational
 - Cost Transaction Summaries
 - Address Corrections
 - Carrier Charge Detail
 - Carrier Charges
 - Carrier Chargebacks
 - Hundredweight
 - Large Package Fees
 - Peak Season Charges
 - Shipment to Accessorial Trend
 - Shipping Charge Correction Fees
 - Size and Weight Impacts
 - Third Party Charges
 - Weight Correction Charges

Summarizes all carrier charges by accessorial. This report can be executed by Ship Date or Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Date Type.
3. Select a Carrier.
4. Select or Deselect Invoice Statuses.
5. Select INBOUND or OUTBOUND, or Both.
6. Select RESIDENTIAL or COMMERCIAL, or Both.
7. Select or Deselect CUSTOM CATEGORY (*setup by request only*).
8. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
9. Execute Report to generate a report on-screen or in email.

beon Insight

Search FAQ

Demo Customer | Change Customer | Test User

Carrier Charges

Execute Report

1 DATE SELECTION

PREVIOUS WEEK PREVIOUS MONTH MONTH TO DATE YEAR TO DATE DAYS BACK CUSTOM

2 DATE TYPE

INVOICE DATE SHIP DATE

3 CARRIER SELECTION

FEDEX EXP. UPS

4 INVOICE STATUSES

IN PROGRESS PAID

5 INBOUND / OUTBOUND

BOTH INBOUND OUTBOUND

6 RES/COM SELECTION

BOTH RESIDENTIAL COMMERCIAL

7 CUSTOM CATEGORY

All Categories NXP Shipments Outbound DC

FILTER BY

ALL

ACCOUNTS

DIVISIONS

CUSTOM LIST

REPORTS | Operational > Cost Transaction Summaries > Carrier Chargebacks

beon Insight

Tracking / Invoice #

DATA MANAGEMENT

TOOLS

REPORTS

- Financial
- Financial Metrics
- Operational
 - Cost Transaction Summaries
 - Address Corrections
 - Carrier Charge Detail
 - Carrier Charges
 - Carrier Chargebacks
 - Hundredweight
 - Large Package Fees
 - Peak Season Charges
 - Shipment to Accessorial Trend
 - Shipping Charge Correction Fees
 - Size and Weight Impacts
 - Third Party Charges
 - Weight Correction Charges

Provides a list of all carrier chargebacks with reason. This report is executed by Invoice Date or Ship Date.

1. Make a Date Selection (including custom dates).
2. Select Date Type.
3. Select a Carrier.
4. Select or Deselect Invoice Statuses.
5. Select INBOUND or OUTBOUND, or Both.
6. Select RESIDENTIAL or COMMERCIAL, or Both.
7. Select or Deselect CUSTOM CATEGORY (*setup by request only*).
8. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
9. Execute Report to generate a report on-screen or in email.

beon Insight

Search FAQ

Demo Customer | Change Customer

Test User

Carrier Charges

Execute Report

1 DATE SELECTION

2 PREVIOUS WEEK PREVIOUS MONTH MONTH TO DATE YEAR TO DATE DAYS BACK CUSTOM

DATE TYPE

INVOICE DATE SHIP DATE

CARRIER SELECTION

3 FEDEX EXP. UPS

INVOICE STATUSES

4 IN PROGRESS PAID

INBOUND / OUTBOUND

5 BOTH INBOUND OUTBOUND

RES/COM SELECTION

6 BOTH RESIDENTIAL COMMERCIAL

CUSTOM CATEGORY

7 All Categories NXP Shipments Outbound DC

FILTER BY 8

ALL

ACCOUNTS

DIVISIONS

CUSTOM LIST

REPORTS | Operational > Cost Transaction Summaries > Hundred Weight

beon Insight

Tracking / Invoice #

DATA MANAGEMENT

TOOLS

REPORTS

- Financial
- Financial Metrics
- Operational
 - Cost Transaction Summaries
 - Address Corrections
 - Carrier Charge Detail
 - Carrier Charges
 - Carrier Chargebacks
 - Hundredweight**
 - Large Package Fees
 - Peak Season Charges
 - Shipment to Accessorial Trend
 - Shipping Charge Correction Fees
 - Size and Weight Impacts
 - Third Party Charges
 - Weight Correction Charges

Displays a list of all invoices that used the Hundredweight service from carrier. This report is executed by Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select or Deselect Invoice Statuses.
4. Select INBOUND or OUTBOUND, or Both.
5. Select RESIDENTIAL or COMMERCIAL, or Both.
6. Select or Deselect CUSTOM CATEGORY (*setup by request only*).
7. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
8. Execute Report to generate a report on-screen or in email.

beon Insight

Search FAQ

Demo Customer | Change Customer | Ifest User

Hundred Weight

Execute Report

1. DATE SELECTION
 - PREVIOUS WEEK
 - PREVIOUS MONTH
 - MONTH TO DATE
 - YEAR TO DATE
 - DAYS BACK
 - CUSTOM
2. CARRIER SELECTION
 - FEDEX EXP.
 - UPS
3. INVOICE STATUSES
 - IN PROGRESS
 - PAID
4. INBOUND / OUTBOUND
 - BOTH
 - INBOUND
 - OUTBOUND
5. RES/COM SELECTION
 - BOTH
 - RESIDENTIAL
 - COMMERCIAL
6. CUSTOM CATEGORY
 - NXP Shipments
 - Outbound DC
7. FILTER BY
 - ALL
 - ACCOUNTS
 - DIVISIONS
 - CUSTOM LIST

REPORTS | Operational > Cost Transaction Summaries > Large Package Fees

Displays a list of all invoices that have large package fees. This report is executed by Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select or Deselect Invoice Statuses.
4. Select INBOUND or OUTBOUND, or Both.
5. Select RESIDENTIAL or COMMERCIAL, or Both.
6. Select or Deselect CUSTOM CATEGORY (*setup by request only*).
7. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
8. Execute Report to generate a report on-screen or in email.

The sidebar menu for beon Insight includes the following items:

- DATA MANAGEMENT
- TOOLS
- REPORTS
 - Financial
 - Financial Metrics
 - Operational
 - Cost Transaction Summaries
 - Address Corrections
 - Carrier Charge Detail
 - Carrier Charges
 - Carrier Chargebacks
 - Hundredweight
 - Large Package Fees
 - Peak Season Charges
 - Shipment to Accessorial Trend
 - Shipping Charge Correction Fees
 - Size and Weight Impacts
 - Third Party Charges
 - Weight Correction Charges

The 'Large Package Fees' report configuration page includes the following sections:

- DATE SELECTION (1):** PREVIOUS WEEK, PREVIOUS MONTH, MONTH TO DATE, YEAR TO DATE, DAYS BACK, CUSTOM
- CARRIER SELECTION (2):** FEDEX EXP., UPS
- INVOICE STATUSES (3):** IN PROGRESS, PAID
- INBOUND / OUTBOUND (4):** BOTH, INBOUND, OUTBOUND
- RES/COM SELECTION (5):** BOTH, RESIDENTIAL, COMMERCIAL
- CUSTOM CATEGORY (6):** NXP Shipments, Outbound DC
- FILTER BY (7):** ALL, ACCOUNTS, DIVISIONS, CUSTOM LIST
- Execute Report (8):** Button to generate the report.

REPORTS | Operational > Cost Transaction Summaries > Peak Season Charges

beon Insight

Tracking / Invoice #

DATA MANAGEMENT

TOOLS

REPORTS

- Financial
- Financial Metrics
- Operational
 - Cost Transaction Summaries
 - Address Corrections
 - Carrier Charge Detail
 - Carrier Charges
 - Carrier Chargebacks
 - Hundredweight
 - Large Package Fees
 - Peak Season Charges
 - Shipment to Accessorial Trend
 - Shipping Charge Correction Fees
 - Size and Weight Impacts
 - Third Party Charges
 - Weight Correction Charges

Provides the additional Peak Season surcharge incurred by the carrier. This report is executed by Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select or Deselect CUSTOM CATEGORY (*setup by request only*).
4. Select INBOUND or OUTBOUND, or Both.
5. Select RESIDENTIAL or COMMERCIAL, or Both.
6. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
7. Execute Report to generate a report on-screen or in email.

beon Insight

Search FAQ

Demo Customer | Change Customer | Test User

Peak Season Charges

Execute Report

DATE SELECTION

1 PREVIOUS WEEK PREVIOUS MONTH MONTH TO DATE YEAR TO DATE DAYS BACK CUSTOM

CARRIER SELECTION

2 ALL CARRIERS FEDEX EXP. UPS

CUSTOM CATEGORY

3 All Categories NXP Shipments Outbound DC

INBOUND / OUTBOUND

4 BOTH INBOUND OUTBOUND

RES/COM SELECTION

5 BOTH RESIDENTIAL COMMERCIAL

FILTER BY

6 ALL ACCOUNTS DIVISIONS CUSTOM LIST

REPORTS | Operational > Cost Transaction Summaries > Shipment to Accessorial Trend

The sidebar contains the following items:

- Tracking / Invoice #
- DATA MANAGEMENT
- TOOLS
- REPORTS
 - Financial
 - Financial Metrics
 - Operational
 - Cost Transaction Summaries
 - Address Corrections
 - Carrier Charge Detail
 - Carrier Charges
 - Carrier Chargebacks
 - Hundredweight
 - Large Package Fees
 - Peak Season Charges
 - Shipment to Accessorial Trend
 - Shipping Charge Correction Fees
 - Size and Weight Impacts
 - Third Party Charges
 - Weight Correction Charges

Summarize the total spend amount per accessorial displaying billed amount, average cost, and percent of volume. This report is executed by Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select RESIDENTIAL or COMMERCIAL, or Both.
4. Select or Deselect a CUSTOM CATEGORY (*setup by request only*).
5. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
6. Execute Report to generate a report on-screen or in email.

The screenshot shows the 'Shipment to Accessorial Trend' report interface with the following elements:

- 1** DATE SELECTION: PREVIOUS WEEK, PREVIOUS MONTH, MONTH TO DATE, YEAR TO DATE, DAYS BACK, CUSTOM
- 2** CARRIER SELECTION: FEDEX EXP., UPS
- 3** RES/COM SELECTION: BOTH, RESIDENTIAL, COMMERCIAL
- 4** CUSTOM CATEGORY: All Categories, NXP Shipments, Outbound DC
- 5** FILTER BY: ALL, ACCOUNTS, DIVISIONS, CUSTOM LIST
- 6** Execute Report button

REPORTS | Operational > Cost Transaction Summaries > Shipping Charge Correction Fees

The sidebar shows the navigation menu for beon Insight. It includes sections for DATA MANAGEMENT, TOOLS, and REPORTS. Under REPORTS, there are sub-sections for Financial, Financial Metrics, Operational, and Cost Transaction Summaries. The Cost Transaction Summaries section is expanded, showing various reports such as Address Corrections, Carrier Charge Detail, Carrier Charges, Carrier Chargebacks, Hundredweight, Large Package Fees, Peak Season Charges, Shipment to Accessorial Trend, Shipping Charge Correction Fees (highlighted with a yellow arrow), Size and Weight Impacts, Third Party Charges, and Weight Correction Charges.

Summarizes by UPS account and also provides detail for the fees associated with UPS shipping charge corrections. This report is executed by Invoice Date.

1. Make a Date Selection (including custom dates).
2. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
3. Execute Report to generate a report on-screen or in email.

The screenshot shows the beon Insight interface for the Shipping Charge Correction Fees report. The header includes the beon Insight logo, a search bar for FAQs, and user information (Demo Customer, Change Customer, Test User). The main title is "Shipping Charge Correction Fees" with an information icon. A yellow circle with the number 3 highlights the "Execute Report" button. Below the title, there are two main sections: "DATE SELECTION" (marked with a yellow circle 1) and "FILTER BY" (marked with a yellow circle 2). The DATE SELECTION section includes buttons for PREVIOUS WEEK, PREVIOUS MONTH, MONTH TO DATE, YEAR TO DATE, DAYS BACK, and CUSTOM. The FILTER BY section includes a dropdown menu with options for ALL, ACCOUNTS, DIVISIONS, and CUSTOM LIST.

REPORTS | Operational > Cost Transaction Summaries > Size and Weights Impacts

beon Insight

Tracking / Invoice #

DATA MANAGEMENT

TOOLS

REPORTS

- Financial
- Financial Metrics
- Operational
 - Cost Transaction Summaries
 - Address Corrections
 - Carrier Charge Detail
 - Carrier Charges
 - Carrier Chargebacks
 - Hundredweight
 - Large Package Fees
 - Peak Season Charges
 - Shipment to Accessorial Trend
 - Shipping Charge Correction Fees
 - Size and Weight Impacts
 - Third Party Charges
 - Weight Correction Charges

Provides a breakdown of expenditures related to the size and weight of the shipments by carrier. This report is executed by Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select INBOUND or OUTBOUND, or Both.
4. Select RESIDENTIAL or COMMERCIAL, or Both.
5. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
6. Execute Report to generate a report on-screen or in email.

beon Insight

Search FAQ

Demo Customer | Change Customer

Test User

Size and Weight Impacts

Execute Report

DATE SELECTION

1 PREVIOUS WEEK PREVIOUS MONTH MONTH TO DATE YEAR TO DATE DAYS BACK CUSTOM

CARRIER SELECTION

2 ALL CARRIERS FEDEX EXP. UPS

INBOUND / OUTBOUND

3 BOTH INBOUND OUTBOUND

RES/COM SELECTION

4 BOTH RESIDENTIAL COMMERCIAL

FILTER BY 5

ALL

ACCOUNTS

DIVISIONS

CUSTOM LIST

REPORTS | Operational > Cost Transaction Summaries > Third Party Charges

Displays invoices that incurred third-party charges. This report is executed by Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select Invoice Statuses: IN PROGRESS, PAID, Both, or Neither.
4. Select Billing Type, COLLECT, THIRD PARTY, or BOTH.
5. Select RESIDENTIAL or COMMERCIAL, or Both.
6. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
7. Execute Report to generate a report on-screen or in email.

The sidebar shows the navigation menu for beon Insight. It includes sections for DATA MANAGEMENT, TOOLS, and REPORTS. Under REPORTS, there are categories like Financial, Financial Metrics, Operational, and Cost Transaction Summaries. A yellow arrow points to 'Third Party Charges' under the Operational category.

The screenshot shows the 'Third Party Charges' report interface. It features a search bar, user information, and a title 'Third Party Charges' with an information icon. The main area contains several filter sections: DATE SELECTION (1), CARRIER SELECTION (2), INVOICE STATUSES (3), BILLING TYPE (4), and RES/COM SELECTION (5). A FILTER BY section (6) is on the right, showing options for ALL, ACCOUNTS, DIVISIONS, and CUSTOM LIST. An 'Execute Report' button (7) is in the top right corner.

REPORTS | Operational > Cost Transaction Summaries > Weight Correction Charges

beon Insight

Tracking / Invoice #

DATA MANAGEMENT

TOOLS

REPORTS

- Financial
- Financial Metrics
- Operational
 - Cost Transaction Summaries
 - Address Corrections
 - Carrier Charge Detail
 - Carrier Charges
 - Carrier Chargebacks
 - Hundredweight
 - Large Package Fees
 - Peak Season Charges
 - Shipment to Accessorial Trend
 - Shipping Charge Correction Fees
 - Size and Weight Impacts
 - Third Party Charges
 - Weight Correction Charges

Displays list of invoices where billed weight is higher than actual weight. This report is executed by Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select Invoice Statuses: IN PROGRESS, PAID, Both, or Neither.
4. Select BILLING TYPE.
5. Select RESIDENTIAL or COMMERCIAL, or Both.
6. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
7. Execute Report to generate a report on-screen or in email.

beon Insight

Search FAQ

Demo Customer | Change Customer | Test User

Third Party Charges i

7 Execute Report

1 DATE SELECTION

PREVIOUS WEEK PREVIOUS MONTH MONTH TO DATE YEAR TO DATE DAYS BACK CUSTOM

2 CARRIER SELECTION

FEDEX EXP. UPS

3 INVOICE STATUSES

IN PROGRESS PAID

BILLING TYPE

COLLECT THIRD PARTY BOTH

RES/COM SELECTION

BOTH RESIDENTIAL COMMERCIAL

FILTER BY 6

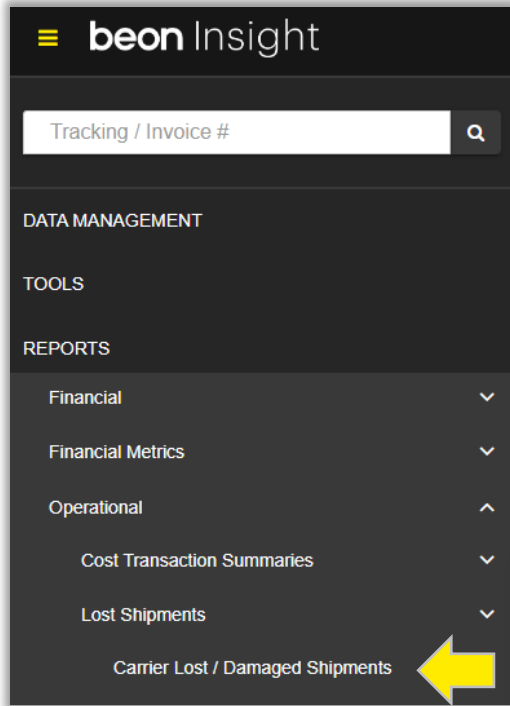
ALL

ACCOUNTS

DIVISIONS

CUSTOM LIST

REPORTS | Operational > Lost Shipments > Carrier Lost / Damaged Shipments

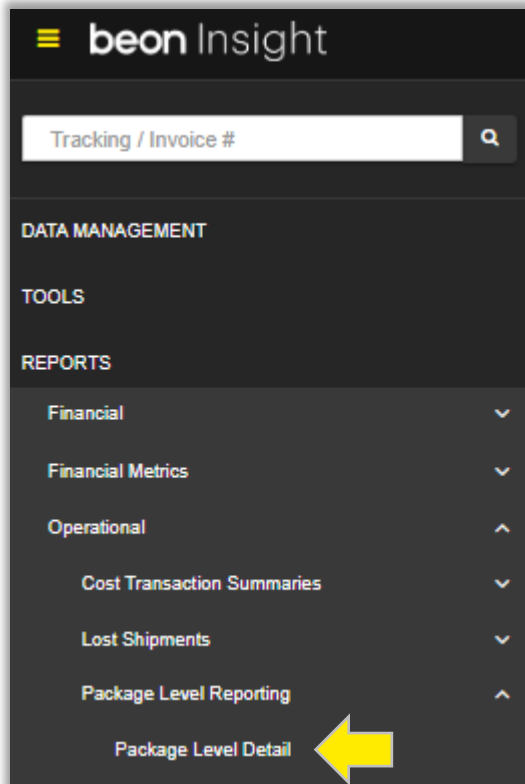


View list of shipments that were lost or damaged. The report is executed by Ship Date.

1. Make a Date Selection (including Days Bac, and Custom Dates).
2. Select a Carrier.
3. Select Lost or Damaged.
4. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
5. Execute Report to generate a report on-screen or in email.

The screenshot shows the 'Carrier Lost / Damaged Shipments' report interface. The top navigation bar includes the beon Insight logo, a search bar for FAQs, and user information for 'Demo Customer'. The main title is 'Carrier Lost / Damaged Shipments' with an information icon. A yellow arrow points to the 'Execute Report' button in the top right corner. The interface is divided into four numbered sections: 1. DATE SELECTION: Includes buttons for PREVIOUS WEEK, PREVIOUS MONTH, MONTH TO DATE, YEAR TO DATE, DAYS BACK, and CUSTOM. 2. CARRIER SELECTION: Includes buttons for FEDEX EXP. and UPS. 3. LOST / DAMAGED: Includes buttons for LOST and DAMAGED. 4. FILTER BY: Includes a dropdown menu with options for ALL, ACCOUNTS, DIVISIONS, and CUSTOM LIST.

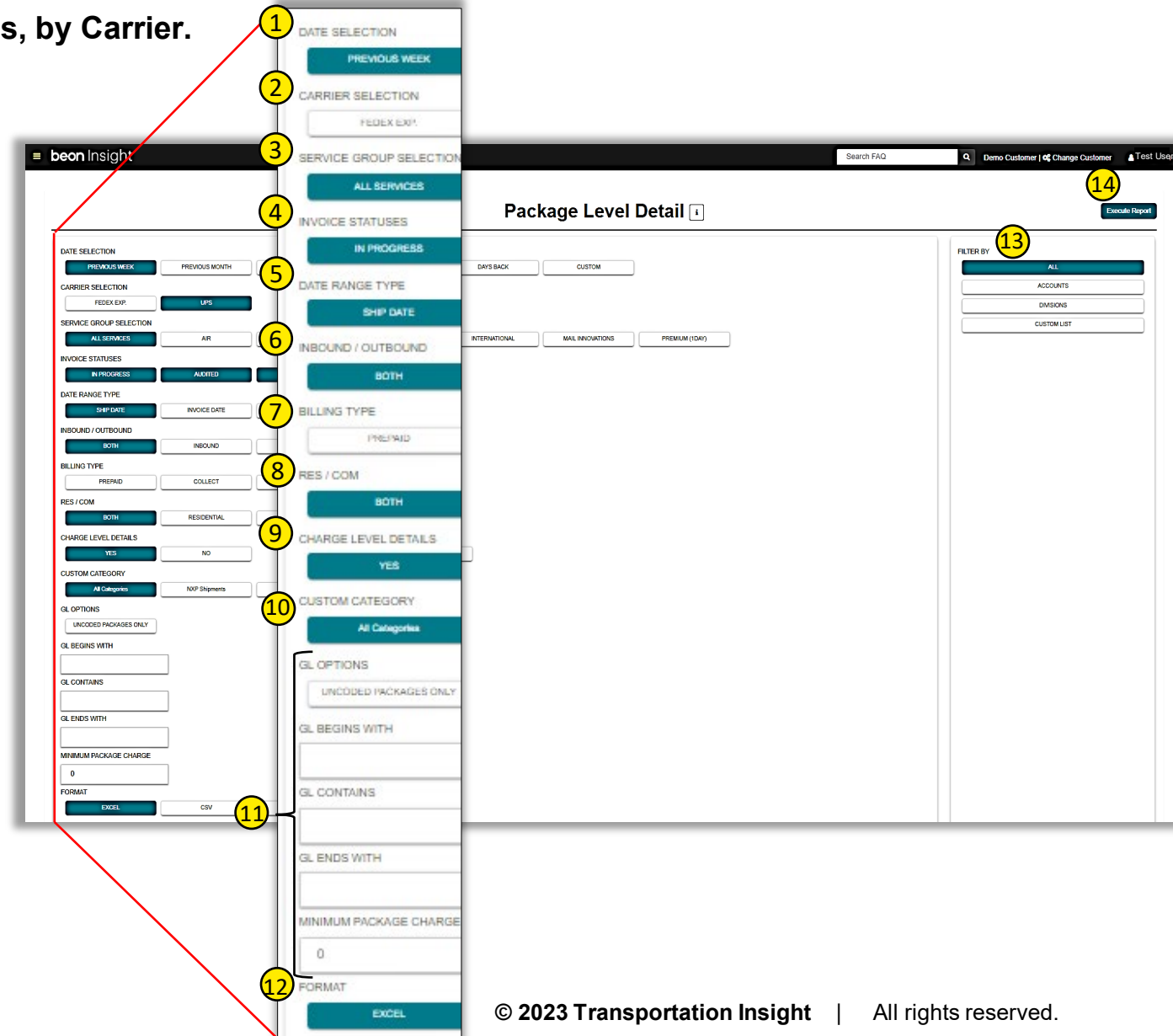
REPORTS | Operational > Package Level Reporting > Package Level Detail



Provides package level details, by Carrier.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Toggle between Service Group Selections.
4. Select Invoice Statuses.
5. Select Date Range Type.
6. Toggle between Inbound / Outbound or Both.
7. Select Billing Type.
8. Toggle between Residential / Commercial or Both.
9. Choose Charge Level Details.

10. Select a Custom Category, or multiple.
11. Select from multiple GL Options.
12. Select the output Format.
13. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
14. Execute Report to generate a report on-screen or in email.



REPORTS | Operational > Shipment Detail > Shipment Status Detail

The sidebar contains the following items from top to bottom: a search bar for 'Tracking / Invoice #' with a magnifying glass icon; 'DATA MANAGEMENT'; 'TOOLS'; 'REPORTS' (highlighted with a yellow line); 'Financial' with a downward arrow; 'Financial Metrics' with a downward arrow; 'Operational' with a downward arrow; 'Cost Transaction Summaries' with a downward arrow; 'Lost Shipments' with a downward arrow; 'Package Level Reporting' with a downward arrow; 'Shipment Detail' with an upward arrow; 'Shipment Status Detail' with a yellow arrow pointing to it from the right; 'Shipment Status Summary'; and 'Shipment Summary'.

Generates report details late, damaged, lost in transit, returned, voided, or on time shipments by sender's state. This report is executed by Ship Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select the Category to view.
4. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
5. Execute Report to generate a report on-screen or in email.

The screenshot shows the 'Shipment Status Detail' report interface. At the top, there is a search bar for 'Search FAQ' and user information: 'Demo Customer | Change Customer | Test Use'. The main title is 'Shipment Status Detail' with an information icon. A yellow circle with the number '5' is next to an 'Execute Report' button. Below the title, there are three sections: 'DATE SELECTION' with options 'PREVIOUS WEEK' (circled 1), 'PREVIOUS MONTH', 'MONTH TO DATE', 'YEAR TO DATE', 'DAYS BACK', and 'CUSTOM'; 'CARRIER SELECTION' with 'FEDEX EXP.' and 'UPS' (circled 2); and 'CATEGORY' with 'ALL' (circled 3), 'VOIDED', 'LOST', 'IN TRANSIT', 'LATE: EXCEPTION', and 'LATE: NO EXCEPTION'. To the right, a 'FILTER BY' section (circled 4) has a dropdown menu with 'ALL' selected, and options for 'ACCOUNTS', 'DIVISIONS', and 'CUSTOM LIST'. A yellow circle with the number '5' is also present in the top right corner of the interface.

REPORTS | Operational > Shipment Detail > Shipment Status Summary

The sidebar contains the following items:

- Tracking / Invoice # (with search icon)
- DATA MANAGEMENT
- TOOLS
- REPORTS
 - Financial
 - Financial Metrics
 - Operational
 - Cost Transaction Summaries
 - Lost Shipments
 - Package Level Reporting
 - Shipment Detail
 - Shipment Status Detail
 - Shipment Status Summary (highlighted with a yellow arrow)
 - Shipment Summary

Summarize the count of shipments by package category (submitted, in transit/not delivered, damaged/returned, manifested no shipped, on time, or late). This report is executed by Ship Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
4. Execute Report to generate a report on-screen or in email.

The screenshot shows the 'Shipment Status Summary' report interface. It includes a search bar, user information, and a title 'Shipment Status Summary' with a help icon. The interface is divided into three main sections:

- DATE SELECTION (1):** Includes buttons for 'PREVIOUS WEEK', 'PREVIOUS MONTH', 'MONTH TO DATE', 'YEAR TO DATE', 'DAYS BACK', and 'CUSTOM'.
- CARRIER SELECTION (2):** Includes buttons for 'FEDEX EXP.' and 'UPS'.
- FILTER BY (3):** Includes a dropdown menu with options: 'ALL', 'ACCOUNTS', 'DIVISIONS', and 'CUSTOM LIST'.

An 'Execute Report' button (4) is located in the top right corner.

REPORTS | Operational > Shipment Detail > Shipment Summary

≡ beon Insight

Tracking / Invoice #

DATA MANAGEMENT

TOOLS

REPORTS

- Financial
- Financial Metrics
- Operational
 - Cost Transaction Summaries
 - Lost Shipments
 - Package Level Reporting
 - Shipment Detail
 - Shipment Status Detail
 - Shipment Status Summary
 - Shipment Summary

Summarizes the total number of packages by category. Includes manifested, delivered on time, delivered late: no exceptions, delivered late: with exceptions, in transit, not delivered, damaged, and returned. This report is executed by Ship Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
4. Execute Report to generate a report on-screen or in email.

≡ beon Insight

Search FAQ

Demo Customer | Change Customer | Test User

Shipment Summary i

4 Execute Report

1 DATE SELECTION

PREVIOUS WEEK PREVIOUS MONTH MONTH TO DATE YEAR TO DATE DAYS BACK CUSTOM

2 CARRIER SELECTION

FEDEX EXP. UPS

3 FILTER BY

ALL

ACCOUNTS

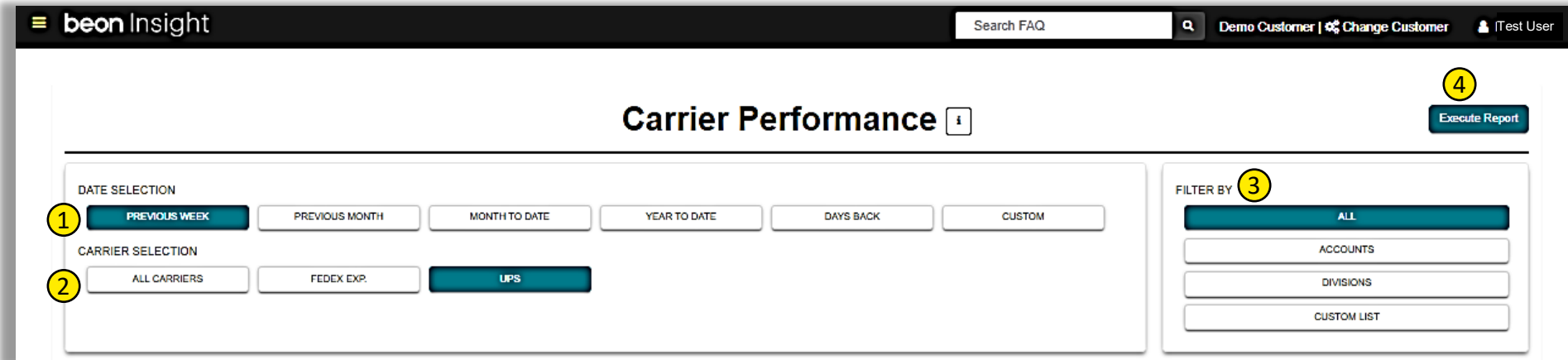
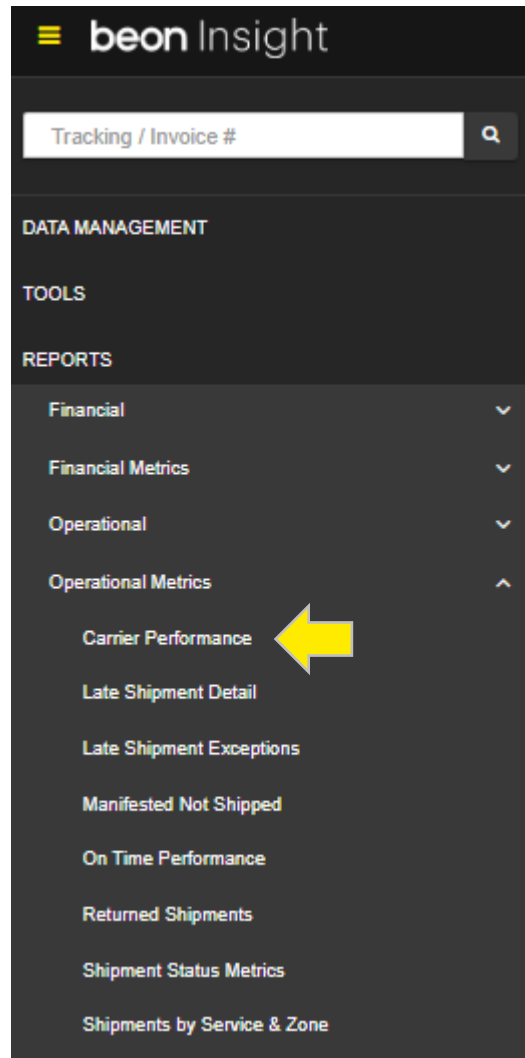
DIVISIONS

CUSTOM LIST

REPORTS | Operational Metrics > Carrier Performance

View total packages per carrier with the percent of packages delivered on time and late. Also includes the number of packages lost, damaged, and in transit. This report is executed by Ship Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
4. Execute Report to generate a report on-screen or in email.



REPORTS | Operational Metrics > Late Shipment Detail

beon Insight

Tracking / Invoice #

DATA MANAGEMENT

TOOLS

REPORTS

- Financial
- Financial Metrics
- Operational
- Operational Metrics
 - Carrier Performance
 - Late Shipment Detail
 - Late Shipment Exceptions
 - Manifested Not Shipped
 - On Time Performance
 - Returned Shipments
 - Shipment Status Metrics
 - Shipments by Service & Zone

View shipment details for late packages. The first tab of the report summarizes late shipments by division and account number; the second tab provides details. This report is executed by Ship Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
4. Execute Report to generate a report on-screen or in email.

beon Insight

Search FAQ

Demo Customer | Change Customer | Test User

Late Shipment Detail

Execute Report

DATE SELECTION

1 PREVIOUS WEEK PREVIOUS MONTH MONTH TO DATE YEAR TO DATE DAYS BACK CUSTOM

CARRIER SELECTION

2 FEDEX EXP. UPS

FILTER BY 3

ALL

ACCOUNTS

DIVISIONS

CUSTOM LIST

REPORTS | Operational Metrics > Late Shipment Exceptions

View shipment exceptions for late packages. This report is executed by Ship Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
4. Execute Report to generate a report on-screen or in email.

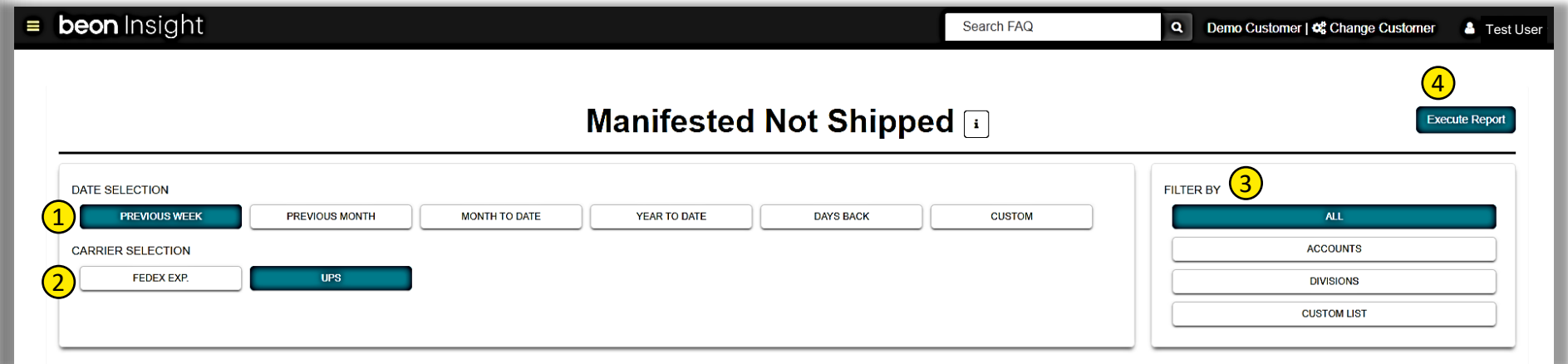
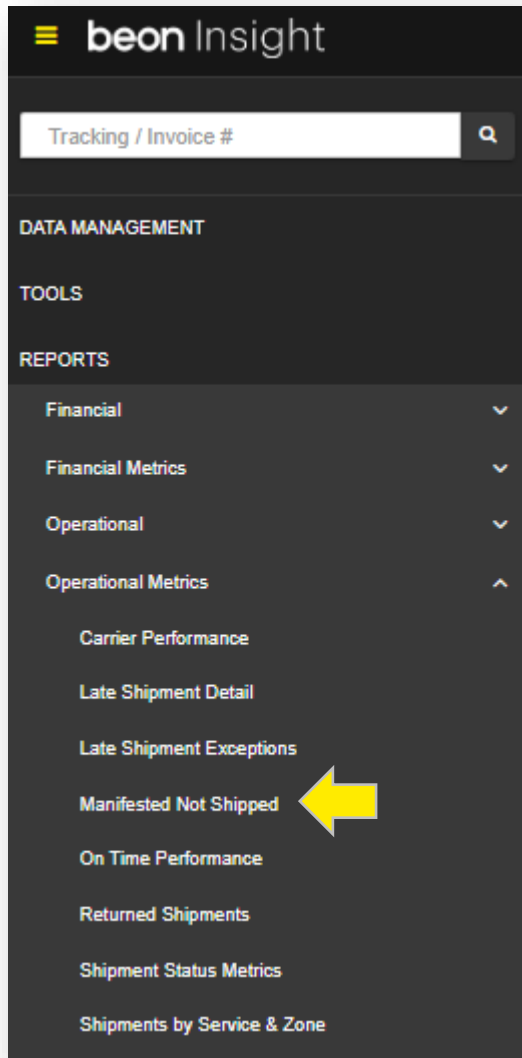
The sidebar shows the navigation menu for beon Insight. It includes sections for DATA MANAGEMENT, TOOLS, and REPORTS. Under REPORTS, there are sub-sections for Financial, Financial Metrics, Operational, and Operational Metrics. A yellow arrow points to 'Late Shipment Exceptions' under the Operational Metrics section.

The screenshot shows the 'Late Shipment Exceptions' report interface. The title 'Late Shipment Exceptions' is centered at the top. Below the title, there are two main sections: 'DATE SELECTION' and 'CARRIER SELECTION'. The 'DATE SELECTION' section has buttons for 'PREVIOUS WEEK', 'PREVIOUS MONTH', 'MONTH TO DATE', 'YEAR TO DATE', 'DAYS BACK', and 'CUSTOM'. The 'CARRIER SELECTION' section has buttons for 'FEDEX EXP.' and 'UPS'. To the right of these sections is a 'FILTER BY' section with a dropdown menu showing 'ALL', 'ACCOUNTS', 'DIVISIONS', and 'CUSTOM LIST'. An 'Execute Report' button is located in the top right corner. Yellow callouts with numbers 1, 2, 3, and 4 highlight the 'PREVIOUS WEEK' button, the 'UPS' button, the 'FILTER BY' dropdown, and the 'Execute Report' button respectively.

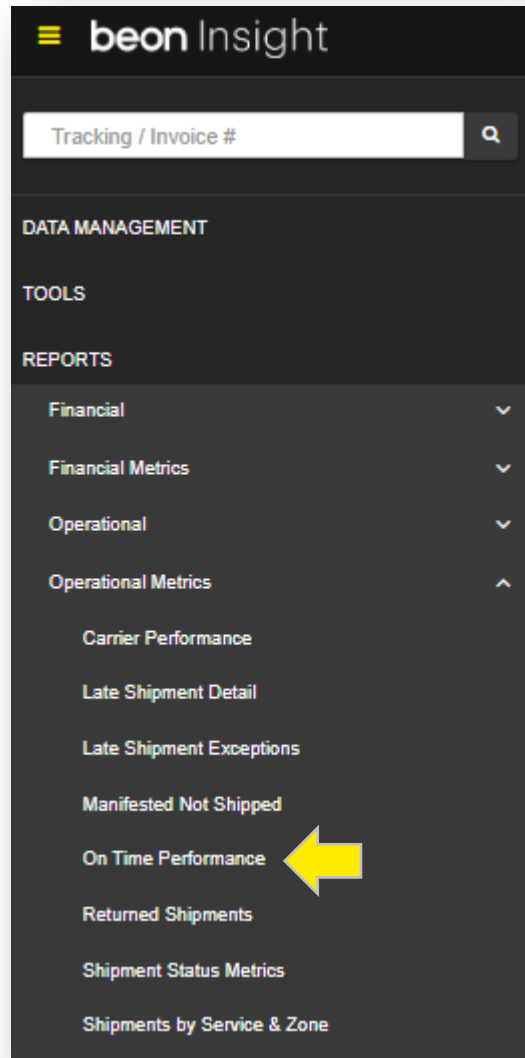
REPORTS | Operational Metrics > Manifested Not Shipped

View shipments that were manifested but not shipped. This report is executed by Ship Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
4. Execute Report to generate a report on-screen or in email.



REPORTS | Operational Metrics > On-Time Performance



An in-depth view of carrier performance 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, destinate information, ship date, calculated expected delivery date, and the actual delivery date. This report can be executed by Invoice Date, Ship Date, or Delivery Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Choose a Date Range Type.
4. Select a Custom Category, or All.
5. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
6. Execute Report to generate a report on-screen or in email.

On Time Performance ⓘ

Execute Report

DATE SELECTION

1. PREVIOUS WEEK | PREVIOUS MONTH | MONTH TO DATE | YEAR TO DATE | DAYS BACK | CUSTOM

CARRIER SELECTION

2. FEDEX EXP. | **UPS**

DATE RANGE TYPE

3. INVOICE DATE | **SHIP DATE** | DELIVERY DATE

CUSTOM CATEGORY

4. **All Categories** | NXP Shipments | Outbound DC

FILTER BY 5.

ALL

ACCOUNTS

DIVISIONS

CUSTOM LIST

REPORTS | Operational Metrics > Returned Shipments

The sidebar shows the navigation menu for beon Insight. It includes sections for DATA MANAGEMENT, TOOLS, and REPORTS. Under REPORTS, there are categories like Financial, Operational, and Operational Metrics. A yellow arrow points to the 'Returned Shipments' option under Operational Metrics.

Generates a list of invoices of invoices that had packages that were returned. This report is executed by Ship Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
4. Execute Report to generate a report on-screen or in email.

The screenshot shows the 'Returned Shipments' report interface. It features a search bar, user information, and an 'Execute Report' button. The main area is divided into 'DATE SELECTION' and 'CARRIER SELECTION' sections. The 'DATE SELECTION' section has buttons for 'PREVIOUS WEEK', 'PREVIOUS MONTH', 'MONTH TO DATE', 'YEAR TO DATE', 'DAYS BACK', and 'CUSTOM'. The 'CARRIER SELECTION' section has buttons for 'FEDEX EXP.' and 'UPS'. A 'FILTER BY' section on the right has a dropdown menu with options: 'ALL', 'ACCOUNTS', 'DIVISIONS', and 'CUSTOM LIST'. A yellow arrow points to the 'Returned Shipments' option in the sidebar.

REPORTS | Operational Metrics > Shipment Status Metrics

The sidebar contains the following items from top to bottom: a search bar for 'Tracking / Invoice #' with a magnifying glass icon; 'DATA MANAGEMENT'; 'TOOLS'; 'REPORTS' (highlighted); 'Financial' with a dropdown arrow; 'Financial Metrics' with a dropdown arrow; 'Operational' with a dropdown arrow; 'Operational Metrics' with an up arrow; 'Carrier Performance'; 'Late Shipment Detail'; 'Late Shipment Exceptions'; 'Manifested Not Shipped'; 'On Time Performance'; 'Returned Shipments'; 'Shipment Status Metrics' (highlighted with a yellow arrow); and 'Shipments by Service & Zone'.

Carrier report that displays shipment status by destination state or account number. This report is executed by Ship Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Toggle between Categories.
4. Select Inbound, Outbound, or Both.
5. Toggle between State or Account.
6. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
7. Execute Report to generate a report on-screen or in email.

The screenshot shows the 'Shipment Status Metrics' report interface. At the top, there is a search bar for 'Search FAQ' and user information: 'Demo Customer | Change Customer | Test User'. The main title is 'Shipment Status Metrics' with an information icon. A yellow circle with the number 7 is next to an 'Execute Report' button. The interface is divided into several sections: 'DATE SELECTION' with buttons for 'PREVIOUS WEEK' (circled 1), 'PREVIOUS MONTH', 'MONTH TO DATE', 'YEAR TO DATE', 'DAYS BACK', and 'CUSTOM'; 'CARRIER SELECTION' with buttons for 'FEDEX EXP.' and 'UPS' (circled 2); 'CATEGORY' with buttons for 'ALL' (circled 3), 'VOIDED', 'LOST', 'IN TRANSIT', 'LATE: EXCEPTION', and 'LATE: NO EXCEPTION'; 'INBOUND/OUTBOUND' with buttons for 'INBOUND/OUTBOUND' (circled 4), 'INBOUND', and 'OUTBOUND'; and 'VIEW BY' with buttons for 'STATE' (circled 5) and 'ACCOUNT'. On the right side, there is a 'FILTER BY' section (circled 6) with a dropdown menu showing 'ALL', 'ACCOUNTS', 'DIVISIONS', and 'CUSTOM LIST'. A yellow circle with the number 7 is also next to the 'Execute Report' button.

REPORTS | Operational Metrics > Shipment by Service & Zone

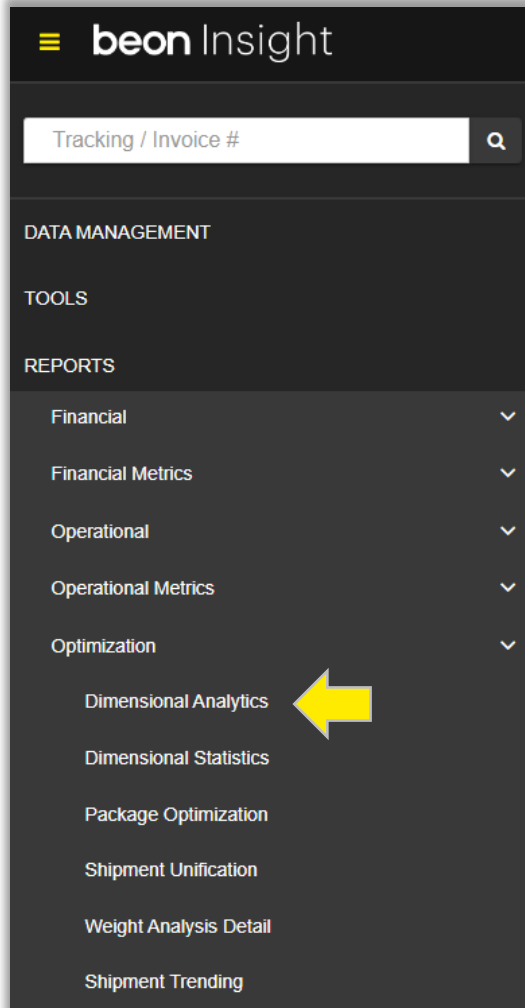
The sidebar contains the following items from top to bottom: a search bar for 'Tracking / Invoice #' with a magnifying glass icon; 'DATA MANAGEMENT'; 'TOOLS'; 'REPORTS' (highlighted); 'Financial' with a dropdown arrow; 'Financial Metrics' with a dropdown arrow; 'Operational' with a dropdown arrow; 'Operational Metrics' with an up arrow; 'Carrier Performance'; 'Late Shipment Detail'; 'Late Shipment Exceptions'; 'Manifested Not Shipped'; 'On Time Performance'; 'Returned Shipments'; 'Shipment Status Metrics'; and 'Shipments by Service & Zone' with a yellow arrow pointing to it.

Group shipments by account, bill type, service, res/com, zone, and date. This report can be executed by Ship Date or Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select Invoice or Ship Date.
4. Toggle between all or one options to Group By.
5. Select a Custom Category or All.
6. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
7. Execute Report to generate a report on-screen or in email.

The screenshot shows the 'Shipments By Service and Zone' report configuration interface. At the top, there is a search bar for 'Search FAQ', user information 'Demo Customer | Change Customer', and 'ITest User'. The main title is 'Shipments By Service and Zone' with an information icon. A yellow circle with the number 7 is next to an 'Execute Report' button. The configuration is divided into several sections: 'DATE SELECTION' with buttons for 'PREVIOUS WEEK' (circled 1), 'PREVIOUS MONTH', 'MONTH TO DATE', 'YEAR TO DATE', 'DAYS BACK', and 'CUSTOM'; 'CARRIER SELECTION' with 'FEDEX EXP.' and 'UPS' (circled 2); 'DATE TYPE' with 'SHIP DATE' (circled 3) and 'INVOICE DATE'; 'GROUP BY' with buttons for 'ACCOUNT' (circled 4), 'BILL TYPE', 'SERVICE', 'RES/COM', 'ZONE', and 'DATE'; and 'CUSTOM CATEGORY' with 'All Categories' (circled 5), 'NXP Shipments', and 'Outbound DC'. On the right, a 'FILTER BY' section (circled 6) has a dropdown menu with 'ALL' selected, and options for 'ACCOUNTS', 'DIVISIONS', and 'CUSTOM LIST'. A yellow circle with the number 7 is also present in the top right corner of the page.

REPORTS | Optimization > Dimensional Analytics



Detailed dimensional look into packages and surcharges that are applied because of size. This report is customized by length, width, height, cubic inch volume, and length + girth measurements. This report is executed by Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Date Range type.
3. Select a Carrier.
4. Select from dimensions to search including Length, Width, Height, and/or Girth.
5. Optional selection: Only Include Packages With Charge Categories: Additional handling, Large Package/Oversized, or Only Show Cubic Variance.
6. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
7. Execute Report to generate a report on-screen or in email.

Dimensional Analytics ⓘ

Execute Report

DATE SELECTION

PREVIOUS WEEK PREVIOUS MONTH MONTH TO DATE YEAR TO DATE DAYS BACK CUSTOM

DATE RANGE TYPE

SHIP DATE INVOICE DATE

CARRIER SELECTION

FEDEX EXP. UPS

LENGTH

Start (optional) To End (optional)

WIDTH

Start (optional) To End (optional)

HEIGHT

Start (optional) To End (optional)

GIRTH

Start (optional) To End (optional)

ONLY INCLUDE PACKAGES WITH CHARGE CATEGORIES (OPTIONAL)

ADDITIONAL HANDLING LARGE PACKAGE / OVERSIZED ONLY SHOW CUBIC VARIANCES

FILTER BY

ALL

ACCOUNTS

DIVISIONS

REPORTS | Optimization > Dimensional Statistics

The sidebar for beon Insight contains the following sections and items:

- Tracking / Invoice # (with search icon)
- DATA MANAGEMENT
- TOOLS
- REPORTS
 - Financial (dropdown arrow)
 - Financial Metrics (dropdown arrow)
 - Operational (dropdown arrow)
 - Operational Metrics (dropdown arrow)
 - Optimization (dropdown arrow)
 - Dimensional Analytics
 - Dimensional Statistics** (highlighted with a yellow arrow)
 - Package Optimization
 - Shipment Unification
 - Weight Analysis Detail
 - Shipment Trending

Provides statistical data by account for your packages including total and average length, width, height, and girth. This report is executed by Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select from Dimensions to search including Length, Width, Height, Girth and/or Cubic Inches.
4. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
5. Execute Report to generate a report on-screen or in email.

The screenshot shows the 'Dimensional Statistics' report interface. It features a top navigation bar with the beon Insight logo, a search bar, and user information. The main content area is titled 'Dimensional Statistics' and includes an 'Execute Report' button. The interface is divided into three main sections: 'DATE SELECTION', 'CARRIER SELECTION', and 'DIMENSIONS'. The 'DATE SELECTION' section has buttons for 'PREVIOUS WEEK', 'PREVIOUS MONTH', 'MONTH TO DATE', 'YEAR TO DATE', 'DAYS BACK', and 'CUSTOM'. The 'CARRIER SELECTION' section has buttons for 'FEDEX EXP.' and 'UPS'. The 'DIMENSIONS' section has buttons for 'LENGTH', 'WIDTH', 'HEIGHT', 'GIRTH', and 'CUBIC INCHES'. A 'FILTER BY' section on the right has a dropdown menu with options for 'ALL', 'ACCOUNTS', and 'DIVISIONS'. A yellow arrow points to the 'Dimensional Statistics' menu item in the sidebar, and yellow circles with numbers 1 through 5 highlight the corresponding steps in the interface.

REPORTS | Optimization > Package Optimization

The sidebar contains the following items from top to bottom: beon Insight logo, a search bar for Tracking / Invoice #, DATA MANAGEMENT, TOOLS, REPORTS, Financial (with a dropdown arrow), Financial Metrics (with a dropdown arrow), Operational (with a dropdown arrow), Operational Metrics (with a dropdown arrow), Optimization (with a dropdown arrow), Dimensional Analytics, Dimensional Statistics, Package Optimization (highlighted with a yellow arrow), Shipment Unification, Weight Analysis Detail, and Shipment Trending.

Summarizes and provides detail for air shipments that would have delivered in the same time or less if shipped via Ground instead. This report is executed by Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Additionally choose to include Outbound Non-Prepaid (ONP).
4. Choose to select if Ground Transit Times Must be Less Than or Equal to Air Transit Time.
5. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
6. Execute Report to generate a report on-screen or in email.

The screenshot shows the 'Package Optimization' configuration page in the beon Insight interface. The page title is 'Package Optimization' with an information icon. A search bar at the top right contains 'Search FAQ'. The user is logged in as 'Demo Customer' and can 'Change Customer' or use a 'Test User'. A yellow arrow points to the 'Package Optimization' menu item in the sidebar. The configuration area is divided into several sections: 'DATE SELECTION' with buttons for 'PREVIOUS WEEK' (1), 'PREVIOUS MONTH', 'MONTH TO DATE', 'YEAR TO DATE', 'DAYS BACK', and 'CUSTOM'; 'CARRIER SELECTION' with buttons for 'FEDEX EXP.' (2) and 'UPS'; 'ADDITIONALLY INCLUDE' with a button for 'OUTBOUND NON-PREPAID (ONP)' (3); and 'GROUND TRANSIT TIME MUST BE LESS THAN OR EQUAL TO AIR TRANSIT TIME' with buttons for 'YES' (4) and 'NO'. On the right, a 'FILTER BY' section (5) has a dropdown menu with 'ALL' selected, and options for 'ACCOUNTS' and 'DIVISIONS'. An 'Execute Report' button (6) is located at the top right of the configuration area.

REPORTS | Optimization > Shipment Unification

Provides the potential savings of consolidating numerous items into one box if shipping multiple packages to same destination on same day. This report is executed by Invoice Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Additionally choose to include Outbound Non-Prepaid (ONP).
4. Type in Max Weight.
5. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
6. Execute Report to generate a report on-screen or in email.

beon Insight

Tracking / Invoice #

DATA MANAGEMENT

TOOLS

REPORTS

- Financial
- Financial Metrics
- Operational
- Operational Metrics
- Optimization
 - Dimensional Analytics
 - Dimensional Statistics
 - Package Optimization
 - Shipment Unification
 - Weight Analysis Detail
 - Shipment Trending

beon Insight

Search FAQ Demo Customer Change Customer Test User

Shipment Unification

Execute Report

DATE SELECTION

PREVIOUS WEEK PREVIOUS MONTH MONTH TO DATE YEAR TO DATE DAYS BACK CUSTOM

CARRIER SELECTION

FEDEX EXP. UPS

ADDITIONALLY INCLUDE

OUTBOUND NON-PREPAID (ONP)

Max Weight:

70

FILTER BY

ALL

ACCOUNTS

DIVISIONS

REPORTS | Optimization > Weight Analysis Detail

The sidebar contains the following items from top to bottom: beon Insight logo, a search bar for Tracking / Invoice #, DATA MANAGEMENT, TOOLS, REPORTS, Financial (with a dropdown arrow), Financial Metrics (with a dropdown arrow), Operational (with a dropdown arrow), Operational Metrics (with a dropdown arrow), Optimization (with a dropdown arrow), Dimensional Analytics, Dimensional Statistics, Package Optimization, Shipment Unification, Weight Analysis Detail (highlighted with a yellow arrow), and Shipment Trending.

Provides a divisional breakdown of package cost, package count, and total weight per weight group. This report is executed by Ship Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
4. Execute Report to generate a report on-screen or in email.

The screenshot shows the 'Weight Analysis Detail' report page. At the top right, there is a search bar, 'Demo Customer', 'Change Customer', and 'Test User' options. The main heading is 'Weight Analysis Detail' with an information icon. A yellow circle '4' highlights the 'Execute Report' button. Below the heading are two main sections: 'DATE SELECTION' and 'CARRIER SELECTION'. In the 'DATE SELECTION' section, a yellow circle '1' highlights the 'PREVIOUS WEEK' button, and the 'YEAR TO DATE' button is selected. In the 'CARRIER SELECTION' section, a yellow circle '2' highlights the 'ALL CARRIERS' button. To the right, a 'FILTER BY' section has a yellow circle '3' highlighting the 'ALL' button, with 'ACCOUNTS' and 'DIVISIONS' options below it. A yellow circle '4' also highlights the 'Execute Report' button.

REPORTS | Optimization > Shipment Trending

☰ beon Insight

Tracking / Invoice # 🔍

DATA MANAGEMENT

TOOLS

REPORTS

- Financial ▾
- Financial Metrics ▾
- Operational ▾
- Operational Metrics ▾
- Optimization ▾
 - Dimensional Analytics
 - Dimensional Statistics
 - Package Optimization
 - Shipment Unification
 - Weight Analysis Detail
 - Shipment Trending ←

Provides a divisional breakdown of total packages per day, per carrier, per account. This report is executed by Ship Date.

1. Make a Date Selection (including custom dates).
2. Select a Carrier.
3. Select a Date Range
4. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
5. Execute Report to generate a report on-screen or in email.

☰ beon Insight

Search FAQ 🔍 Demo Customer | Change Customer Test User

Shipment Trending ⓘ

Execute Report

DATE SELECTION

1 PREVIOUS WEEK PREVIOUS MONTH MONTH TO DATE YEAR TO DATE DAYS BACK CUSTOM

CARRIER SELECTION

2 ALL CARRIERS FEDEX EXP. UPS

DATE RANGE TYPE

3 DAILY WEEKLY MONTHLY

FILTER BY 4

ALL

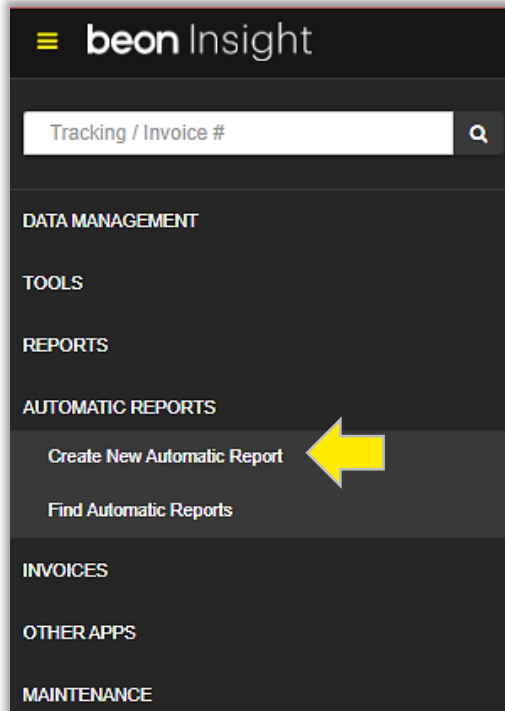
ACCOUNTS

DIVISIONS

AUTOMATIC REPORTS | Create New Automatic Report

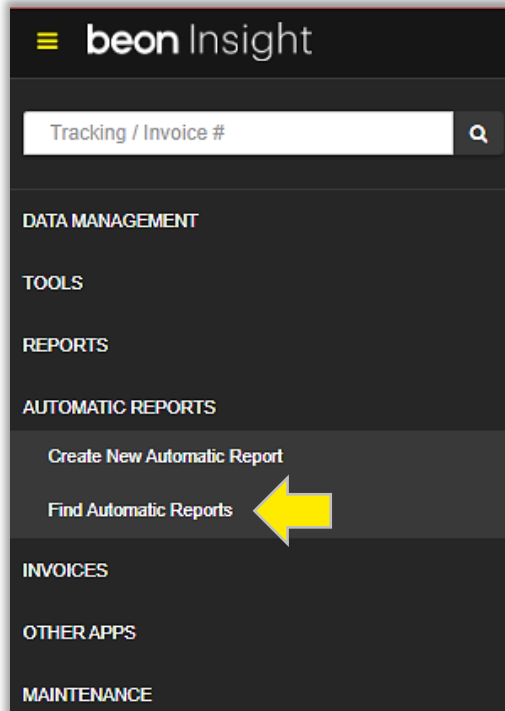
Schedule reports to automatically be delivered by email based on chosen cadence. Reports can be executed by Invoice Date, Paid Date, or Ship Date, depending on selected report.

1. Select the Report.
2. Filter by - ALL or select one or multiple from the following drop-down menus: Accounts, Divisions, or Custom List.
3. Send the report to one recipient; select their name at the drop-down menu. Or send the report to multiple recipients; click at EMAIL LIST and type the email addresses of recipients (use a comma to separate the email addresses).
4. Add a note to the email by clicking in the field Notes for Email
5. Select Frequency.
Additional options: a) Date Selection or b) Carrier Selection
6. Schedule Report
Additional actions may apply to other charts.



The image shows the 'Add Automatic Report' form in the beon Insight application. The form is titled 'Add Automatic Report' and includes several sections: 'WHICH REPORT' (with a dropdown menu set to 'Account List'), 'FILTER BY' (with buttons for 'ALL', 'ACCOUNTS', 'DIVISIONS', and 'CUSTOM LIST'), 'SEND TO' (with a dropdown menu set to 'USER' and an 'EMAIL LIST' button), 'Notes For Email' (with a text area), and 'FREQUENCY' (with buttons for 'WEEKLY', 'MONTHLY', and days of the week). A 'Schedule Report' button is located in the top right corner. The form is annotated with yellow circles 1 through 6 and blue circles 'a' and 'b' corresponding to the numbered steps in the text above.

AUTOMATIC REPORTS | Find Automatic Report



Search for reports that have been scheduled.

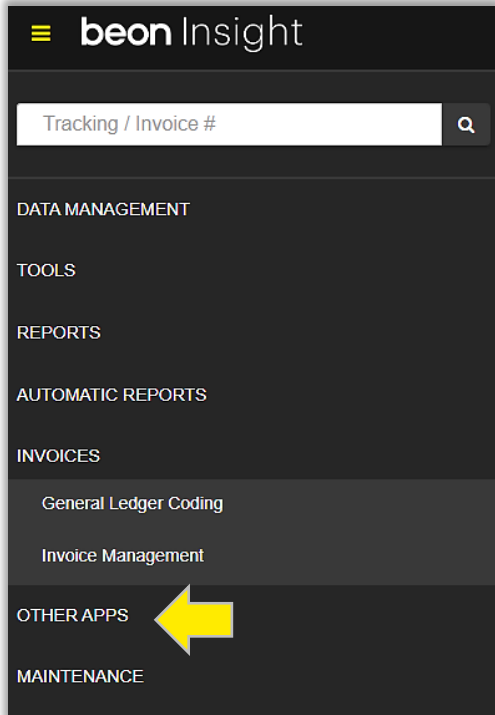
1. Select the Report at the drop-down menu.
2. Select the Carrier(s) at the drop-down menu.
3. Select the User, or ALL.
4. Search by Email (partial email search is available).
5. Click Search.

The 'Find Automatic Report' form contains the following fields and callouts:

- Report:** A dropdown menu with 'ALL' selected, marked with a yellow circle containing the number 1.
- Carrier:** A dropdown menu with 'ALL' selected, marked with a yellow circle containing the number 2.
- User:** A dropdown menu with 'j.moizing' selected, marked with a yellow circle containing the number 3.
- Email:** A text input field, marked with a yellow circle containing the number 4. Below the field, it says '(partial email search available)'. A yellow circle containing the number 5 is positioned above the 'Search' button.

The 'Search' button is located in the top right corner of the form area.

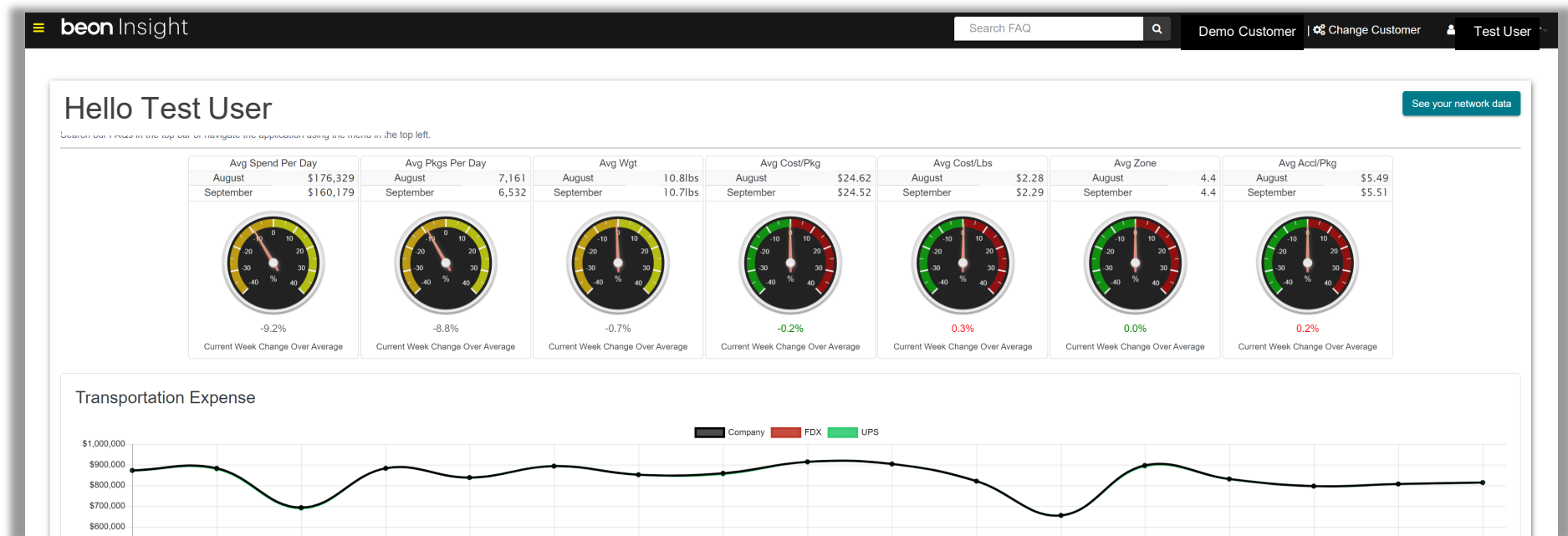
OTHER APPS | Dashboards Portal Link



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**.



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.*

Report Descriptions | FINANCIAL METRICS & OPERATIONAL

FINANCIAL METRICS (cont'd) >

Invoice – Ship/Delivery/Pay

Shows when the packages invoiced during the date range were shipped, delivered and paid. *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.*

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.*

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.*

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.

Thank you.

This user guide provides specific support to the REPORT sections of FEMS.

*For support in other areas of FEMS, please reference **Beon Insight FEMS General User Guides**.*

For additional assistance please contact your Account Manager.

