



# beon Insight

## Beon Insight Business Intelligence Tool Dashboard User Guide

July 2022

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## Business Intelligence Dashboards

Provides a high-level view of Client's carrier spend data in real-time.

Quickly access spend trends with carriers in chart, graph, and/or report formats.

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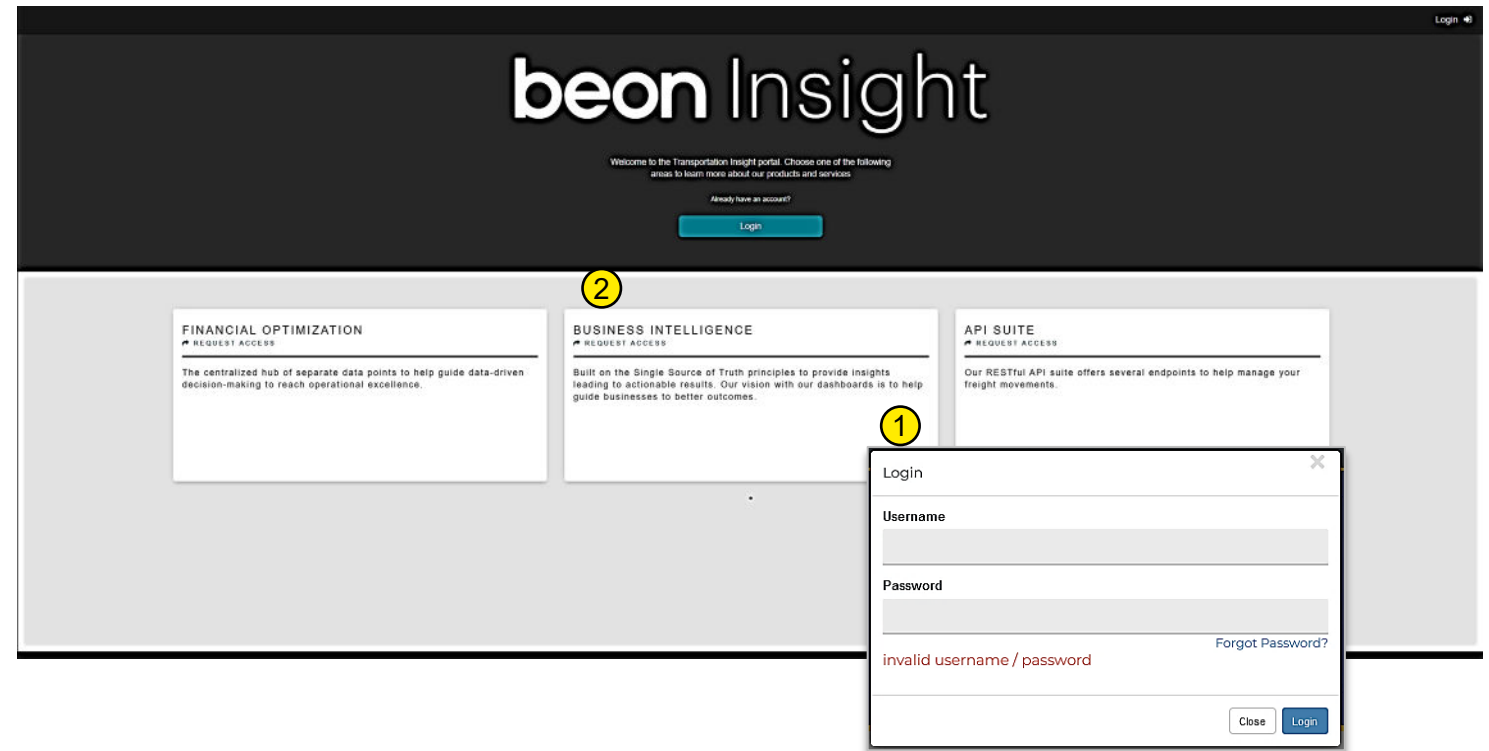
# Login Instructions

Access the Parcel Fusion Dashboards Tool at <https://ti.platinumportals.com/>

- (1) Log in with email and password.
- (2) Select BUSINESS INTELLIGENCE.

Two-factor authentication has been established for all clients. At login, clients 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

Clients 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 and Features\*

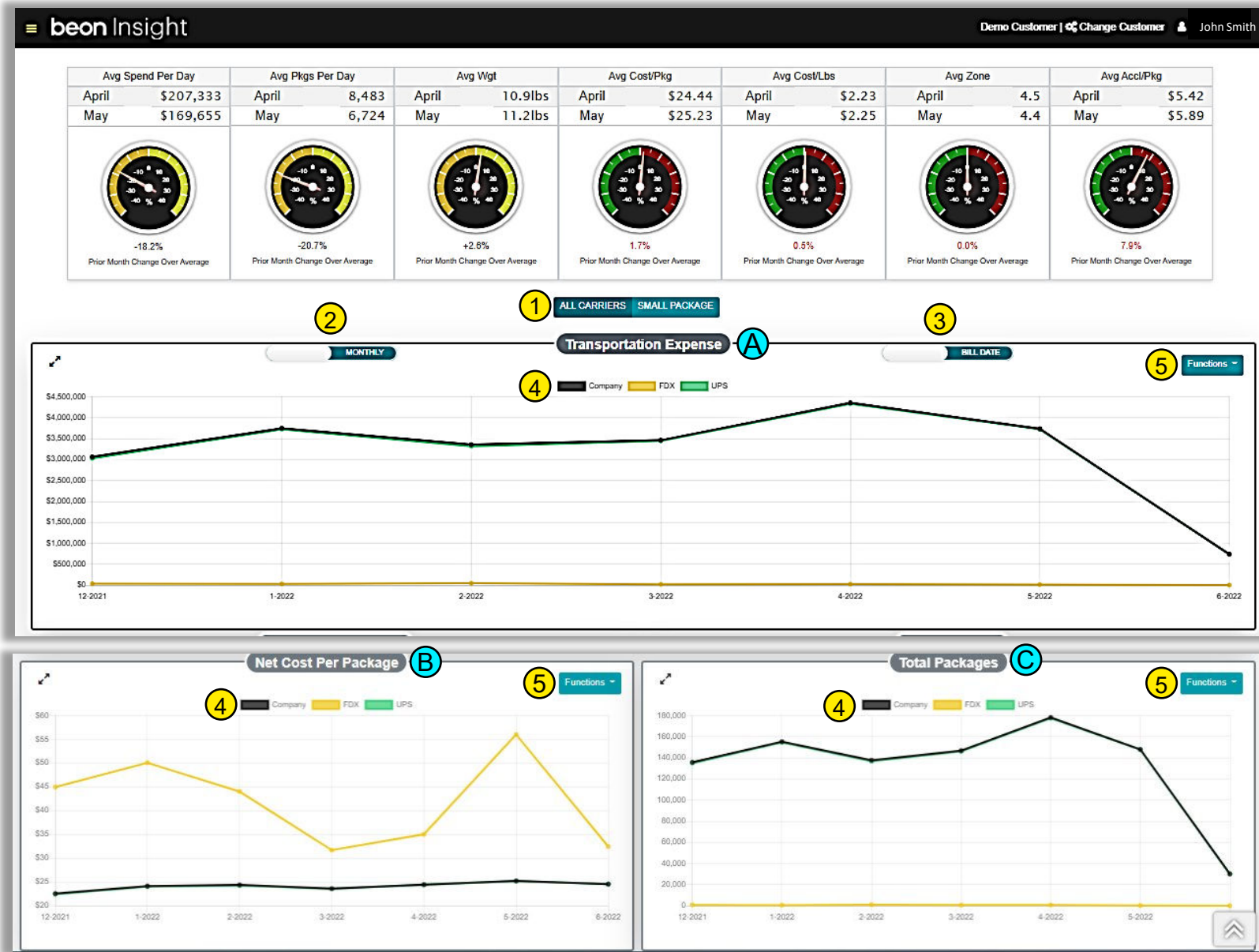
## Toggle View Controls:

1. All Carriers or Small Packages
2. Weekly or Monthly
3. Ship Date or Bill Date
4. Sort by Carrier or include All
5. Show / Hide or Export to Excel

View Spend Trends with options to export to Excel (Only Graphs and their Data Points may be exported):

- A. Transportation Expense
- B. Net Cost Per Package
- C. Total Packages

\*Example is reduced to 50%.



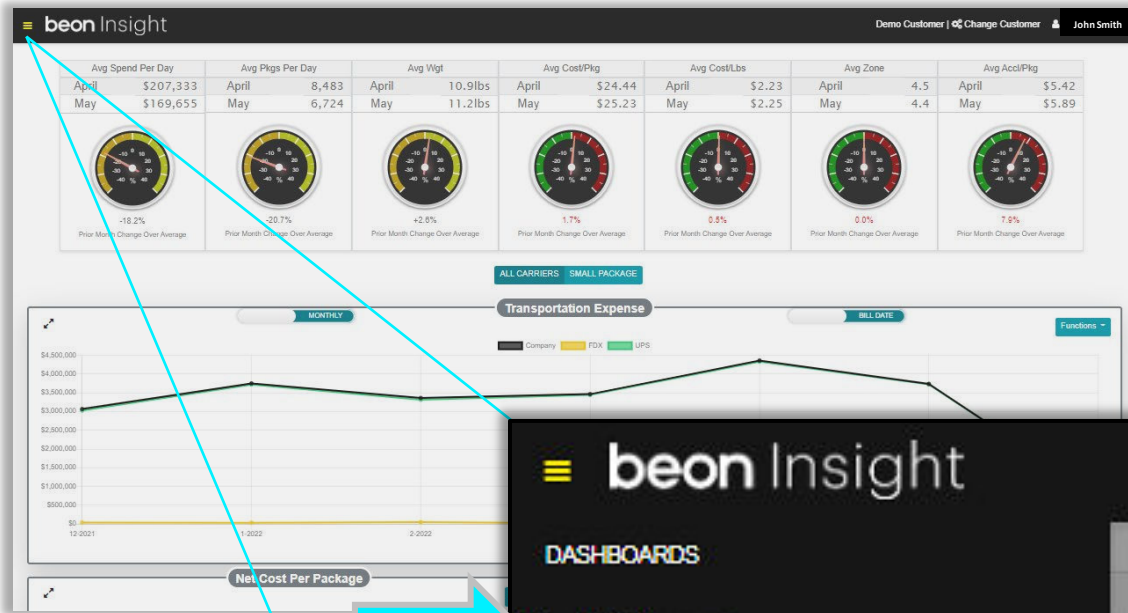
# Dashboards Overview | Menus

## Financial

- Transportation Spend
- Accessorials
- Carrier Spend Metrics
- Revenue Tier Management
- Seasonal Calendar By Ship Date
- Year Over Year

## Operational

- Carrier Metric
- Carrier Performance
- MSA Data
- National Carrier Performance
- Package Distribution
- Weight Analysis By Ship Date



The menu overlay displays the following structure:

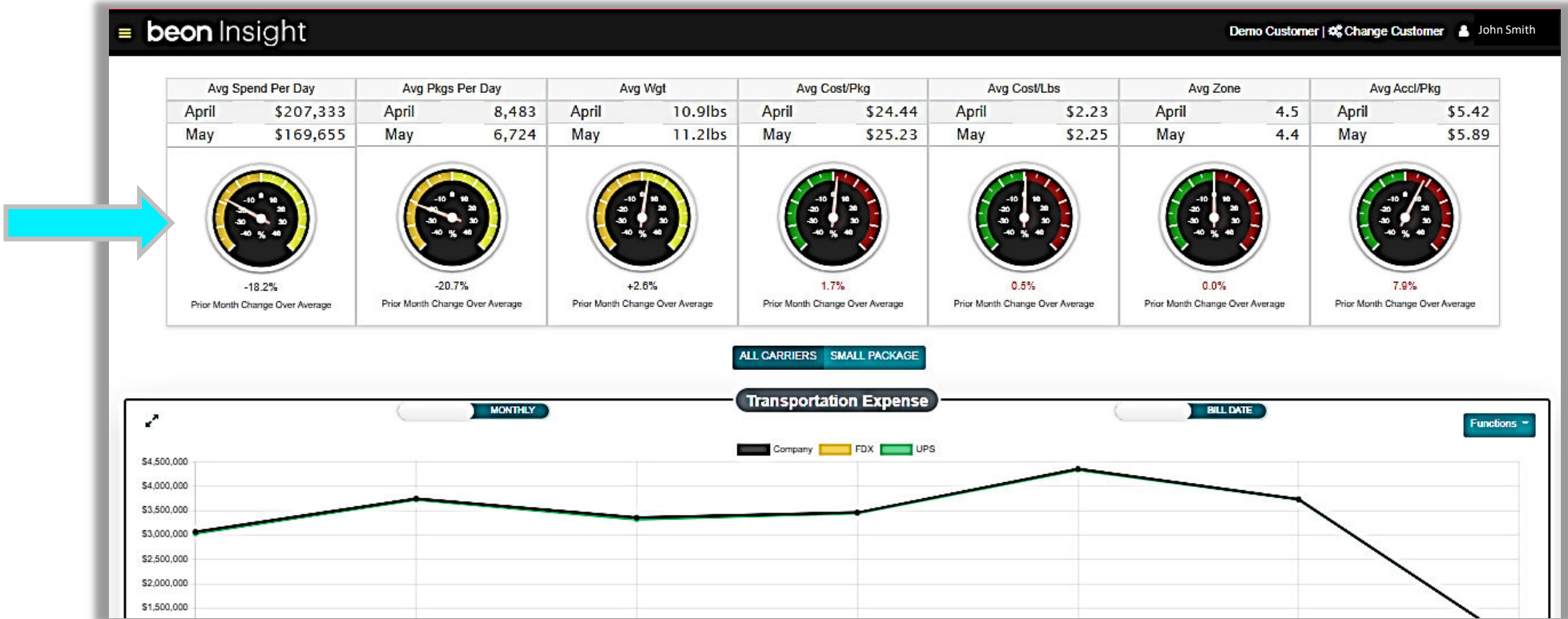
- beon Insight
- DASHBOARDS
  - Small Package ▾ (highlighted with a blue arrow labeled "1")
  - Financial ▾ (highlighted with a yellow arrow)
  - Operational ▾ (highlighted with a yellow arrow)
- SITES
- Parcel Finance Portal

# Dashboards Overview | Gauges

Access a high-level view of your total transportation spend, accessorial trends, and carrier performance data in real-time. Image is an example of the Dashboard Landing Page.

## Gauges

- Will reflect changes made to Filters.
- Quickly view the previous two month's data.
- Display average comparisons among date range selected.





# Dashboards Overview | Filters

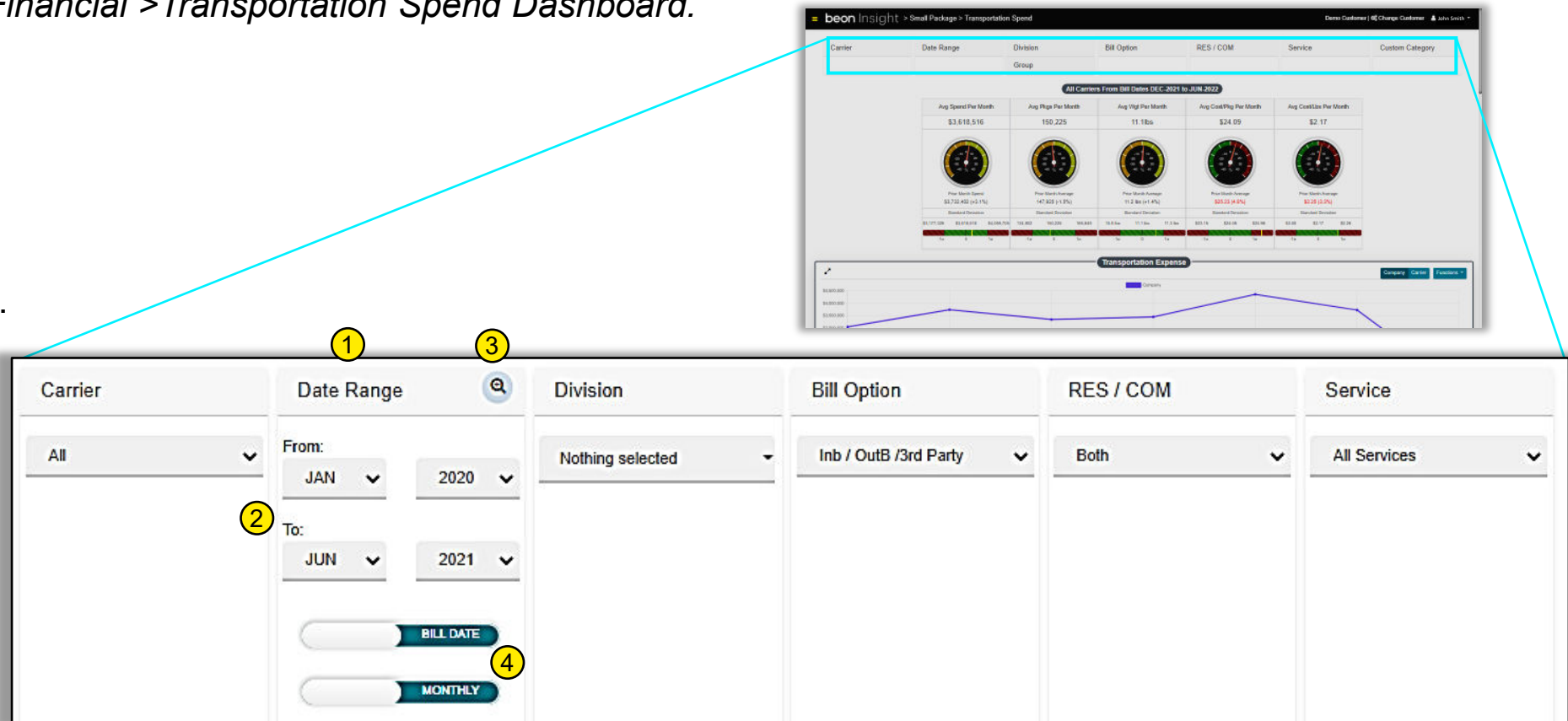
## Filters:

- Quickly modify spend trend data to reflect instantly in Gauges, charts/graphs, or report formats.
- Appear at the top of the Dashboard screens.
- All Dashboards include filters for Carrier, Date Range, and Division and/or Group (some Dashboards include additional filters).

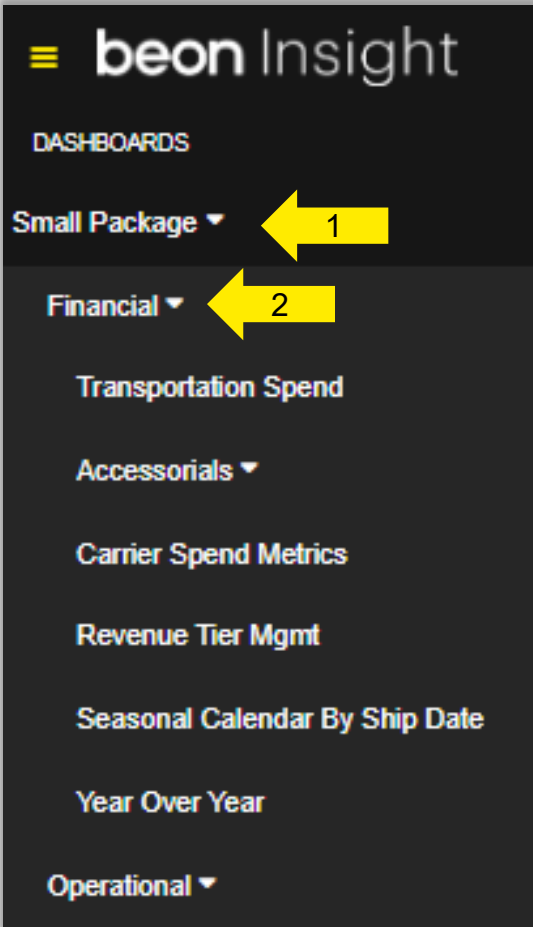
The example below is from the *Financial >Transportation Spend Dashboard*.

## To Modify Filters:

1. Click on the Filter for a drop-down menu (for example **Date Range**).
2. Make a date selection.
3. **Click the magnifying glass.**  
This will reset applicable gauges and charts.
4. Toggle options for **Bill Date /Ship Date** and **Weekly / Monthly**.



# Financial Menu



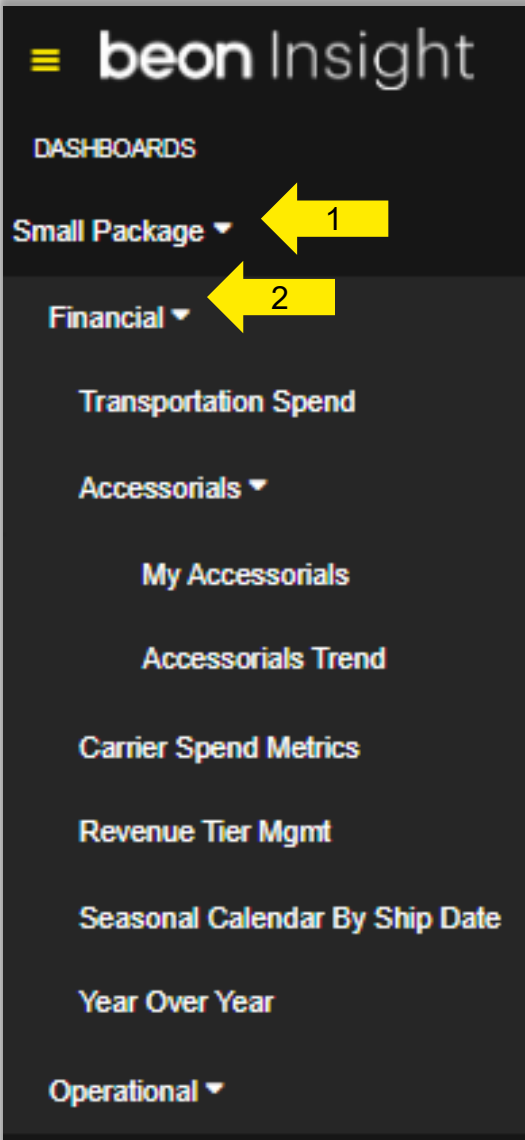
Nearly all Financial categories include options to filter data by: **Carrier, Date Range, Division and/or Group**; with options to **Export to a spreadsheet**.

**Transportation Spend** - Includes the following chart and options to view data:

- **Transportation Expense:** Total transportation spend by carrier.
- **Package Count:** Total package count by carrier.
- **Net Cost Per Package:** A detailed analysis includes Total Cost as well as Freight / Fuel Only comparison options.
- **Billed Weight:** Displays delineation between original weight and billed weight from carrier.
- **Packages by Service:** Displays bar chart breaking down your shipments by service.
- **Fuel Per Package:** Displays impact of fuel cost per package.
- **Weight Adj/Fees:** View with or without Add Fees and view by Value, Average, or Count.
- **Carrier Weight Difference (As %):** Displays the percentage of packages with weight differences.
- **Packages by Zone:** Displays the percentage of packages shipped per zone.
- **Freight Discount:** Displays Freight Discounts per service.
- **Packages That Hit Minimum:** Shows percent of packages that hit the minimum charge.
- Additional Filters included are Bill Option and RES/COM, along with filters mentioned above.



# Financial Menu | Continued



Nearly all Financial categories include options to filter data by: **Carrier, Date Range, Division and/or Group**; with options to **Export to a spreadsheet**.

**Accessorials** – Create a customized view with up to 27 Accessorial options by order of most impactful to least impactful. Includes a **Manageable Only** view option.

**Carrier Spend Metrics** – View and compare carrier spend across different categories such as **Package Count, Weight, Packages per Zone**, and more, with the availability to view **Freight, Fuel**, and **Accessorial** costs simultaneously. **Service** is an additional filter on this page.

**Revenue Tier Management** – Check on your revenue tier by Carrier(s) and Date Range in real-time.

**Seasonal Calendar By Ship Date** – View the total number of the dollar amount of packages shipped daily, along with the average cost per package. Additional specific data: Total Cost, Package Count, Total Weight, Average Weigh per Package, Average Accessorial Cost per Package, and Average Cost per Package. This tool provides advanced visibility to packages that have entered carrier networks but have not yet been invoiced.

**Year Over Year** – Compare the following annual transportation expenses by year (or multiple years): “Transportation Expense” -compare **Company** and **Carrier** costs; “Net Cost per Package” and “Total Packages”. Additional filters include Bill Option and Service – Air / Freight / Ground / International, etc.

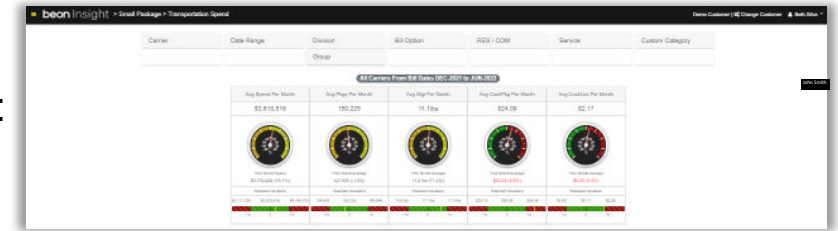
# Financial | Transportation Spend

## Scroll Down to View and Modify the following Charts:

Transportation Expenses, Package Count, Net Cost Per Package, Billed Weight, Packages by Service, Fuel Per Package, Weight Adj/Fees, Carrier Weight Difference (As%), Packages By Zone, Freight Discount, and Packages That Hit Minimum.

## Compare Transportation Spend Fee Details at the Transportation Expense graph:

1. Toggle between entire **Company** transportation expense or **Carrier** expense.
2. Click **Functions** at the right to Hide Values, Show Values, or Export a chart.
3. Hover over data points for details.

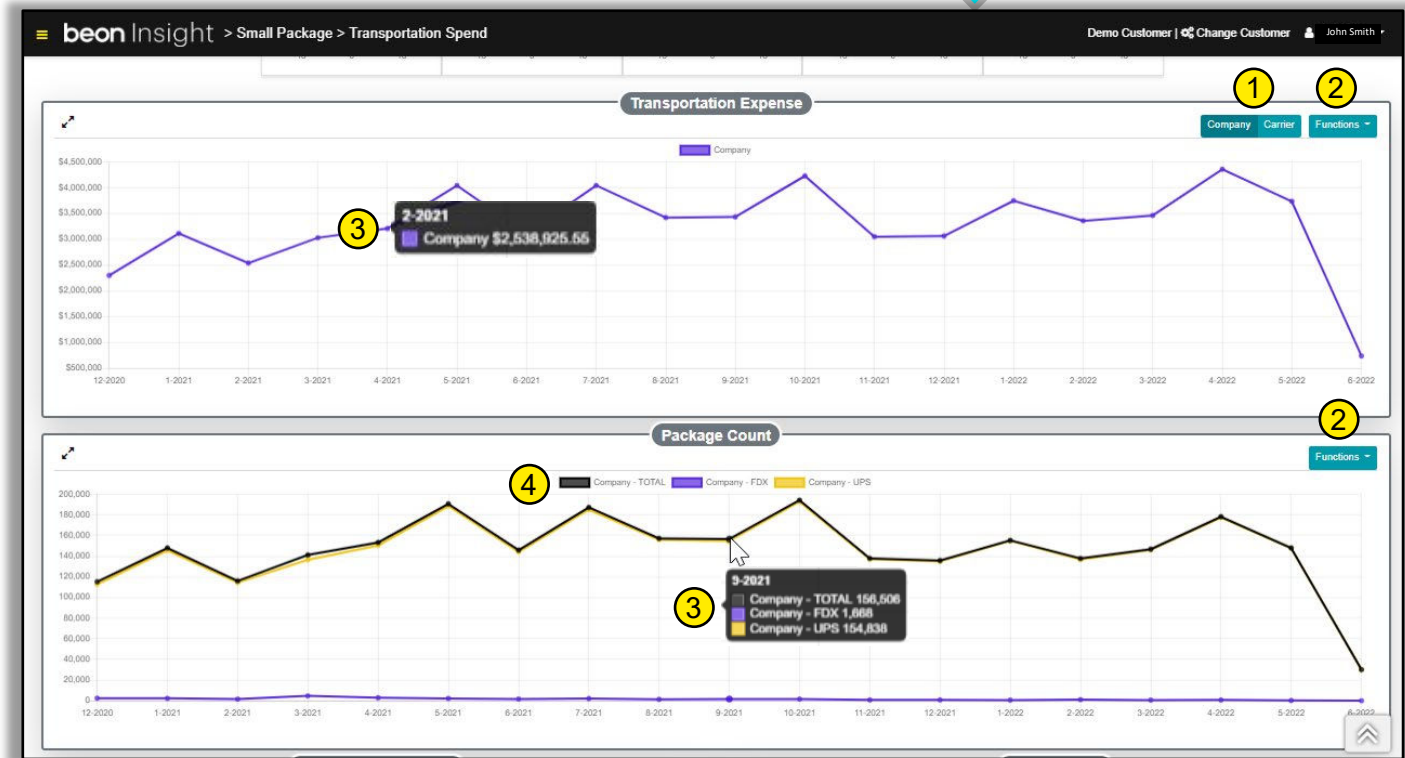


## At the Package Count graph view package count by Company and /or Carrier:

4. Select and/or Deselect the option(s) under the chart title.

Additional data filter views: Bill Option, RES/COM, and Service.

To change filter views at the top of the Dashboard refer to page 7.



# Financial | My Accessorials

## Customize Dashboards with Accessorials of choice.

1. Click to select Accessorial(s) to remain on the Dashboard. (See example below for *Late Payment Fee*)
2. Click **Save**.
3. To change saved Accessorials, click **Reset Dashboard Layout** (in the red box).

Additional filters include Bill Option and RES/COM.

To change filter views at the top of the new Dashboard refer to page 7.

beon Insight > Small Package > My Accessorials

Setup Page Layout

What items do you want to see?

- Additional Handling
- Address Corrections
- Adjustments
- Beon Credits Approved
- Charge Back Fees
- Collect on Delivery (COD)
- Declared Value Charges
- Delivery Area Surcharges
- Delivery Charges
- Delivery Confirmation
- Duties/Taxes
- Freight Discount
- Freight Related
- Fuel Surcharge
- GSR
- Hazardous Materials
- Large Package / Oversized
- Late Payment Fees **1**
- Misc Credits
- Other Misc Charges
- Peak Surcharges
- Pickup Charges
- Residential Surcharge
- Returns
- Saturday Fees
- Service Fees
- Supplier
- Third Party Service Fee

Drag and Drop the chart placeholders below to re-order how you want **2** your dashboard, then click save.

Save

FedEx Express From Bill Dates  
P1: DEC-2021 to JUN-2022

Late Payment Fees

Reset Dashboard Layout

beon Insight > Small Package > My Accessorials

Carrier Date Range Division Bill Option RES / COM Custom Category

Group

FedEx Express From Bill Dates  
P1: DEC-2021 to JUN-2022

Reset Dashboard Layout **3**

Late Payment Fees

Company

Date	Value
12-2021	0.00
1-2022	0.00
2-2022	0.00
3-2022	0.00
4-2022	0.00
5-2022	140.00
6-2022	0.00

# Financial | Accessorial Trends

## Scroll Down to View and Modify Accessorial Charts

Listed by client's *most* impactful accessorial on package cost to *least* impactful. Gain insight on *manageable* accessorials - charges that may be managed internally to reduce costs.

Further, analyze chosen Accessorial fees. (*In the example below the accessorial fees Pickup Charges and Additional Handling were chosen and therefore displayed as Pickup Charges and Additional Handling charts.*)

For each chart:

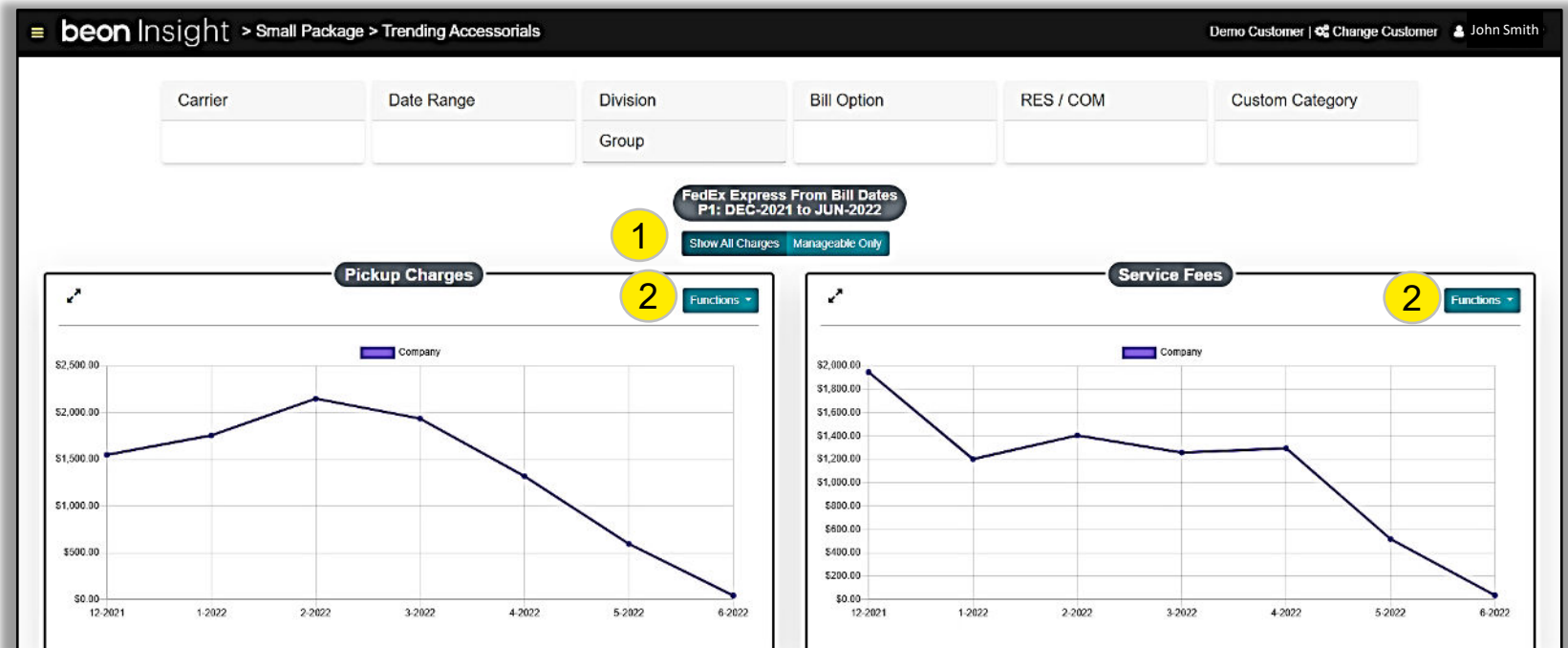
1. Toggle between **Show All Charges** or **Manageable Only**.

2. Select **Functions** at the right of the chart title to view additional chart options:

- Billed Amount
- Transactions
- Percent of Spend
- Export a chart to a spreadsheet

Additional filters include Bill Option and RES/COM.

*To change filter views at the top of the Dashboard refer to page 7.*



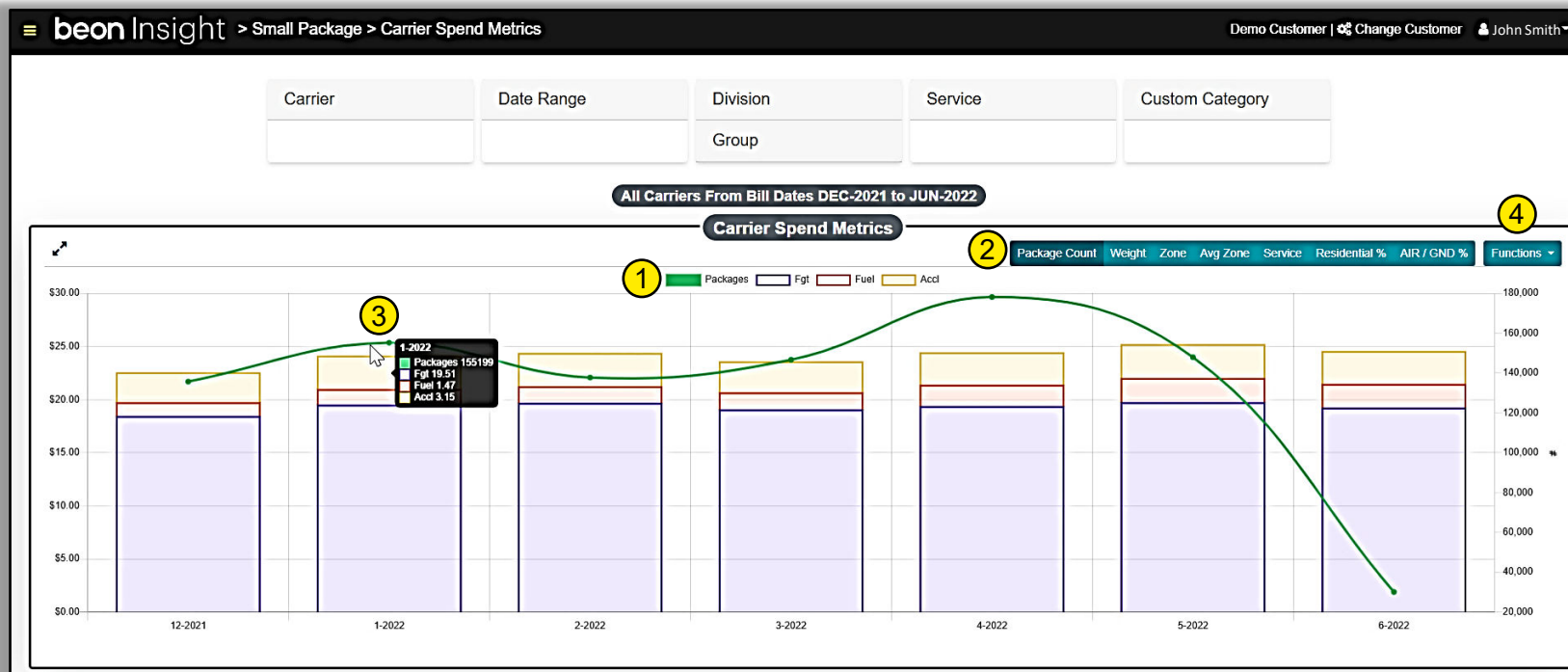
# Financial | Carrier Spend Metrics

Compare carrier spend categories.

For additional data on **Carrier Spend Metrics** and to change charts and graphs:

1. Select and/or Deselect filter option(s) under the chart title.
2. Toggle filters at the right of the chart title: **Package Count, Weight, Zone, Avg Zone, Service, Residential %, and AIR/GND.**
3. Hover over chart data for details.
4. Click **Functions** at the right to Hide Values, Show Values, or Export a chart.

Additional data filters include Bill Option and RES/COM. *To change filter views at the top of the Dashboard refer to page 7.*



# Financial | Revenue Tier Management

View weekly revenue expense and current revenue tier status.

1. To change the **Date Range**, choose the dates and click the magnifying glass icon.
2. Toggle expenses by **Bill Date** or **Ship Date**.
3. Select **Functions** at the right to Export a chart to a spreadsheet.



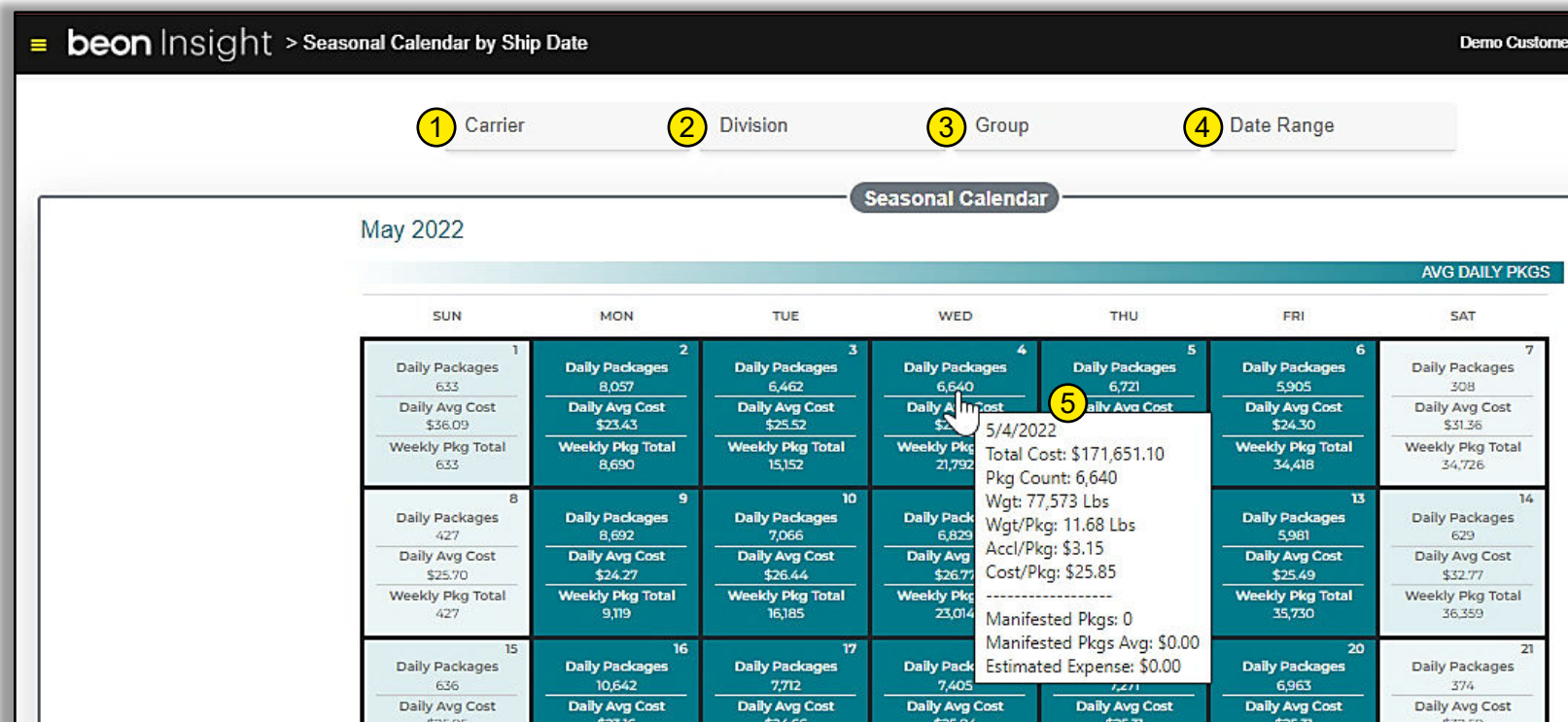


# Financial | Seasonal Calendar By Ship Date

Displays a monthly calendar view of daily packages, daily average cost, & weekly package total. Use filters for spend details.

When using the filters, always click the magnifying glass icon to generate new results:

1. Choose **Carrier**.
2. Select and/or Deselect one or more **Divisions**.
3. Select and/or Deselect one or more **Groups**.
4. Select **Date Range**, click the magnifier to confirm selection.
5. Hover over a date on the calendar to view expenses for that day: Total Cost, Package Count, Total Weight, Average Weight per Package, Average Accessorial Cost per Package, and Average Cost per Package.



# Financial | Year Over Year

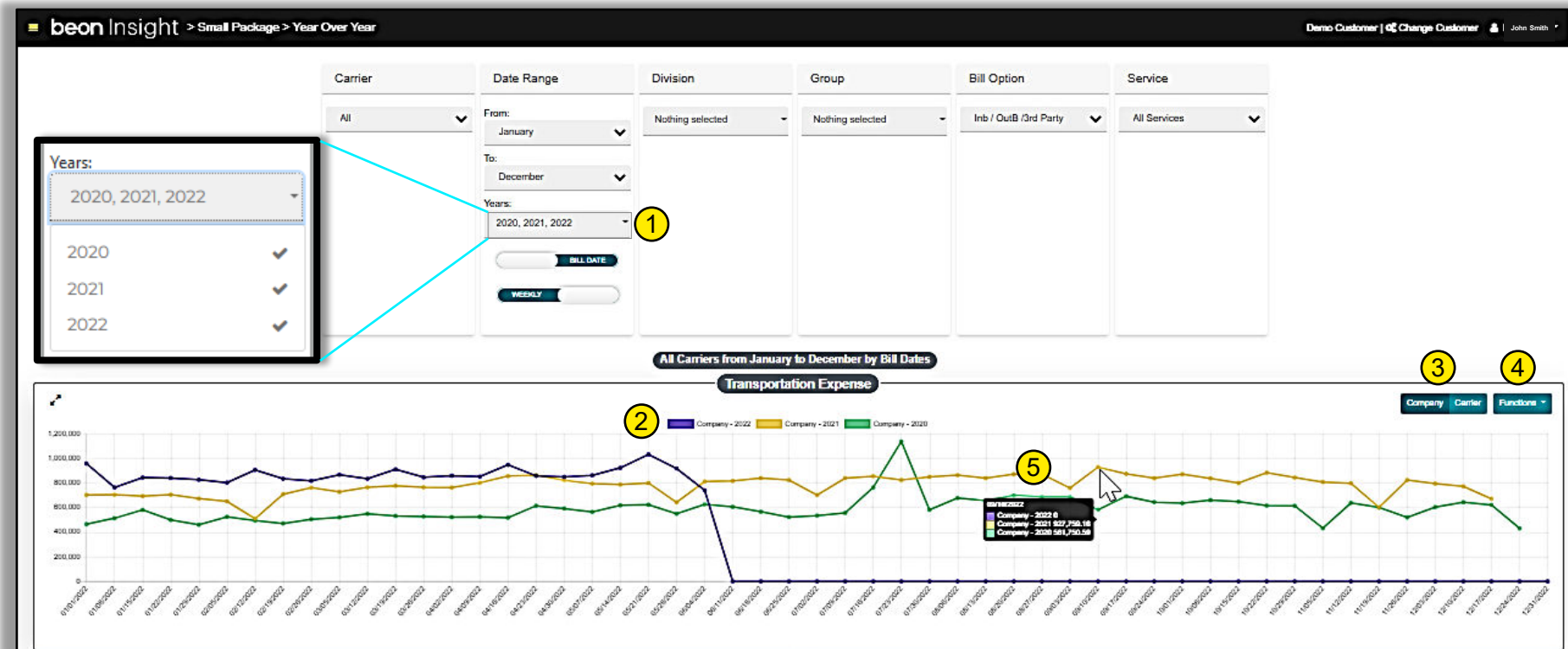
Shows annual data (with options to include multiple years) for Transportation Expense, Net Cost Per Package, and Total Packages.

## Scroll Down to View and Modify the following Charts:

Net Cost Per Package and Total Packages.

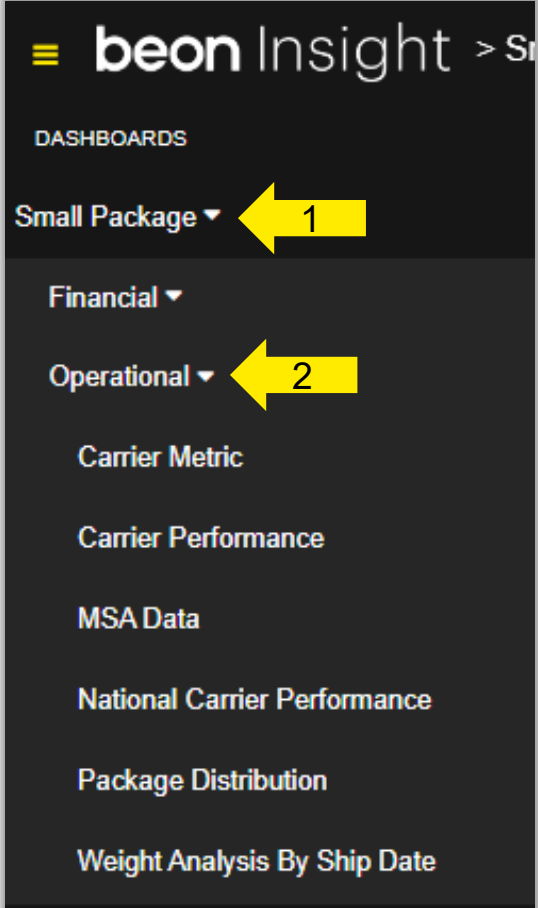
To compare financial data between Company and Carrier, at the **Transportation Expense** chart:

1. Select multiple Years: click **Date Range** filter > Select **Years** to view. Click the magnifying glass to confirm selection.
2. Compare data across years - Select and/or Deselect year(s).
3. Toggle at **Company** or **Carrier** to view specific data.
4. Select **Functions** at the right to Hide Values, Show Values, or Export a chart.
5. Hover over chart data for details.



Bill Option filter is also available. To change filter views at the top of the Dashboard refer to page 7.

# Operational Menu



Nearly all Financial categories include options to filter data by: **Carrier, Date Range, Division and/or Group.**

**Carrier Metric** - View “Volume by Service” and “Volume by Carrier”. Filters include: 1 Day Early, 2 Day Early, 1 Day, 2 Day, and 3 Day, Ground and Postal. Data may also be filtered by the filters at the top of the page.

**Carrier Performance** - Analyze on-time performance and delivery exceptions. With filters for On Time Performance By Averages or Package Count. And the filters listed above.

**MSA Data (Metropolitan Statistical Area)** - View the metropolitan areas where your company is shipping to and from. This page will rank the MSA in order of highest to lowest based on the Number of Packages shipped to and from the MSA. From that ranking, multiple graphs will identify Total Cost, Average Cost, Carrier Performance, and Average Transit Days by Destination and origin MSA. Data may also be filtered by the filters listed above and Bill Option and by Service.

**National Carrier Performance** – This page expands on MSA data by providing the average UPS and FedEx delivery performance across all clients that our system hosts data for. Using the data displayed will allow clients to compare their results with the national carrier performance average. Data may also be filtered by the above-listed filters.

**Package Distribution** - A heat map of client-specific MSA (Metropolitan Statistical Area) data that may be filtered by the filters listed above. Offers map view options: terrain or satellite.

**Weight Analysis By Ship Date** – View the total cost, number of packages, percent of total packages, average weight, accessorial fees, and the average cost per package - in eight different weight brackets. This chart can also be filtered by the above-listed filters.

# Operational | Carrier Metric

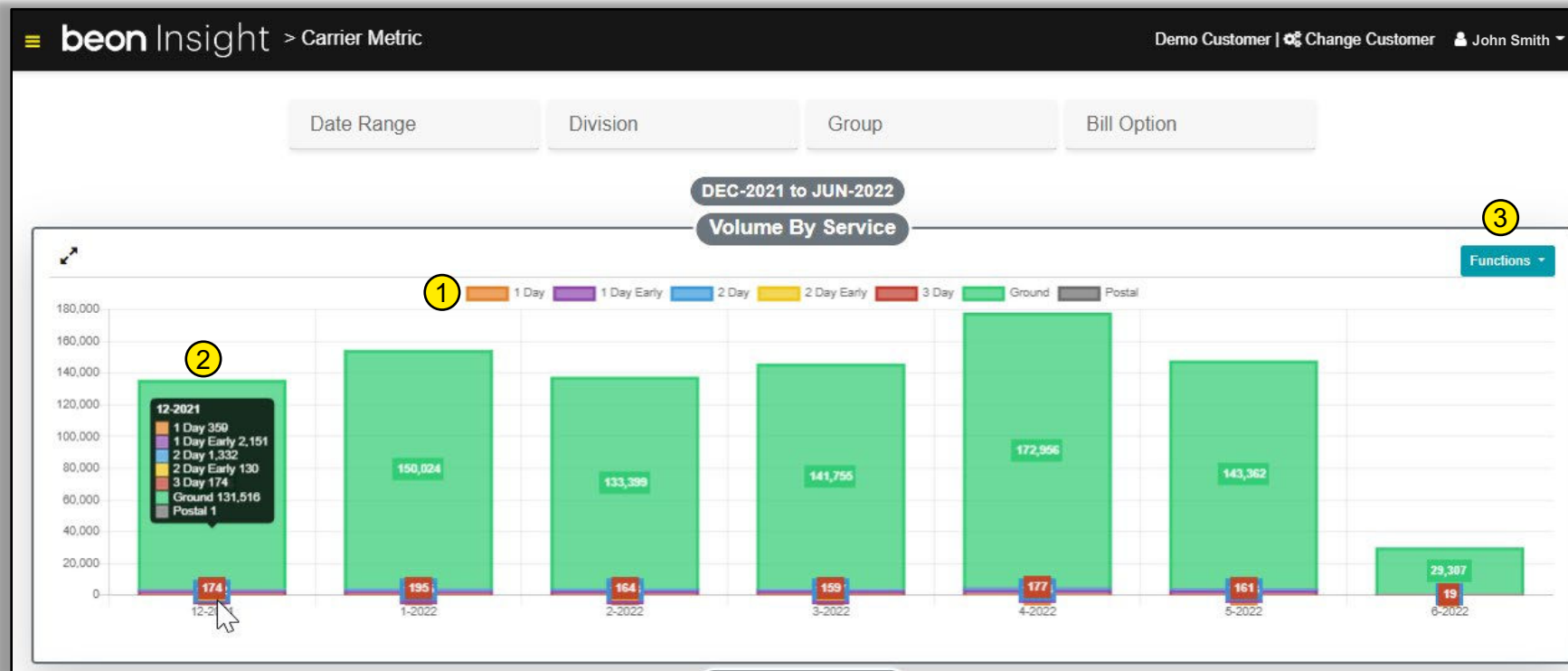
Analyze volume by service and carrier

## Scroll Down to View and Modify the following Chart:

Volume By Carrier

1. Select and/or Deselect shipping service types.
2. Hover over chart data for details.
3. Select **Functions** at the right to Hide Values, Show Values, or Export a chart.

To change filter views at the top of the Dashboard refer to page 7.



# Operational | Carrier Performance

Analyze on-time performance and delivery exceptions.

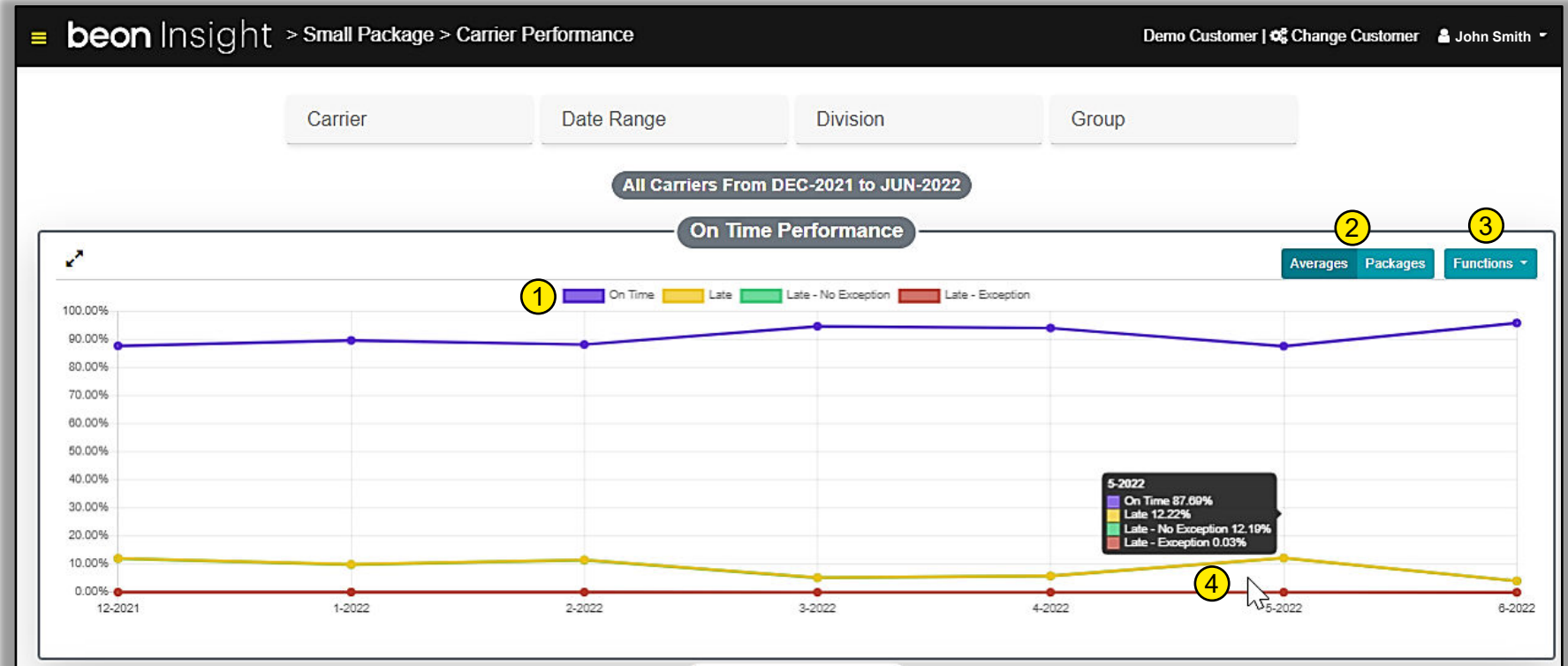
## Scroll Down to View and Modify the following Chart:

Delivery Expectations

Enhance Carrier Performance data at the **On Time Performance** chart:

1. Select and/or Deselect Time Performance options below the chart title.
2. Toggle to view chart by **Averages** or **Packages**.
3. Select **Functions** at the right to Hide Values, Show Values, or Export a chart.
4. Hover to view data points.

To change filter views at the top of the Dashboard refer to page 7.





# Operational | MSA Data

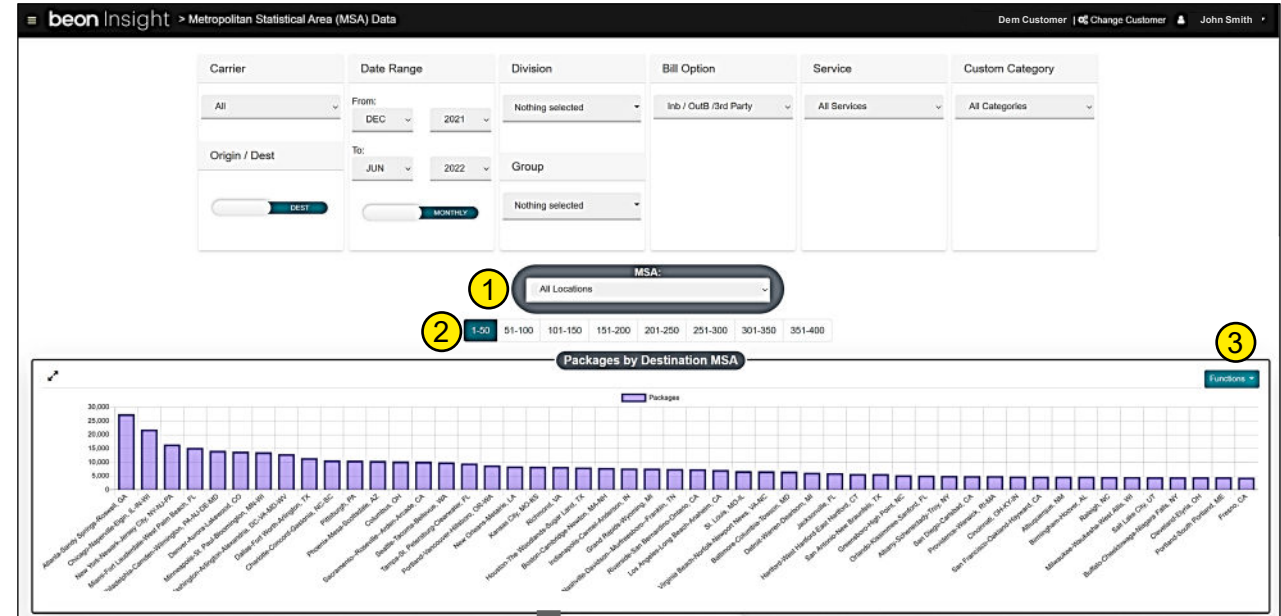
Analyze Packages by Destination using Metropolitan Statistical Area Data.

## Scroll Down to View and Modify the following Charts:

Total Cost by Destination MSA, Average Cost by Destination MSA, Carrier Performance by Destination MSA, and Average Transit Days by Destination MSA.

For additional data, at **Packages by Destination MSA** chart:

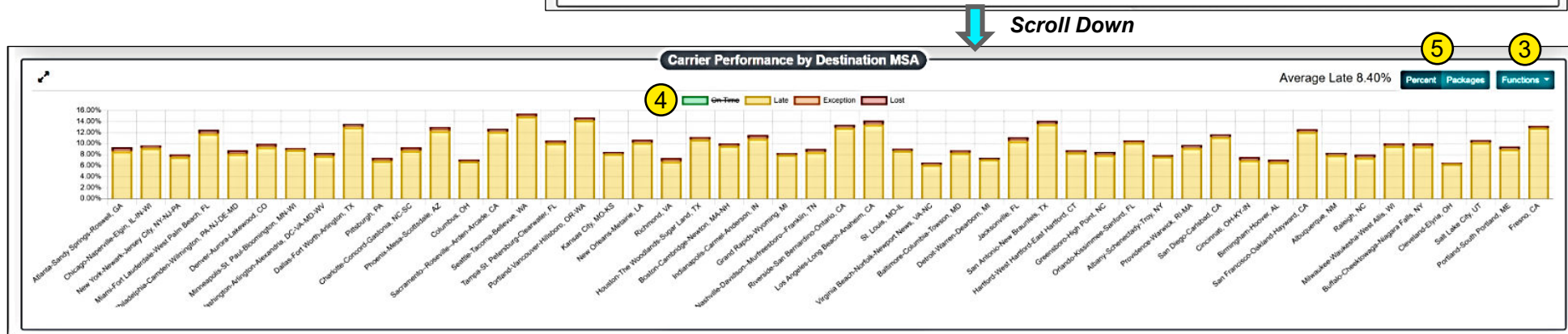
1. Select a specific MSA (Metro location) using the drop-down menu.
2. Toggle for new increments of **50** to view MSA Data. The display is from the area with the most packages to the least.
3. Select **Functions** to Export the chart data.



Scroll down to modify data on the chart **Carrier Performance by Destination MSA**:

4. Select and/or Deselect: **On Time, Late, Exception, Lost**.
5. Toggle by **Percent** or **Packages**.

To change filter views at the top of the Dashboard refer to page 7.





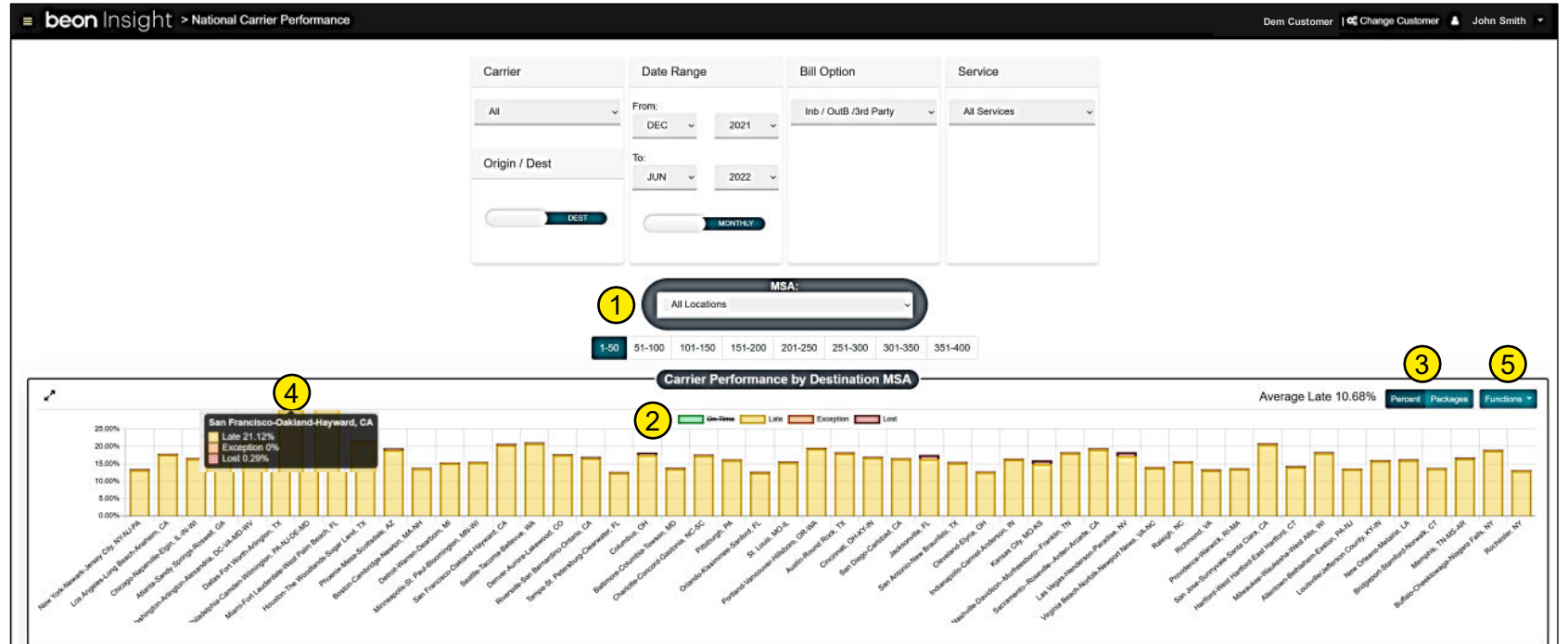
# Operational | National Carrier Performance

Compare carrier performance by destination with national data. Automatically MSA data is sorted by shipping volume, in increments of 50.

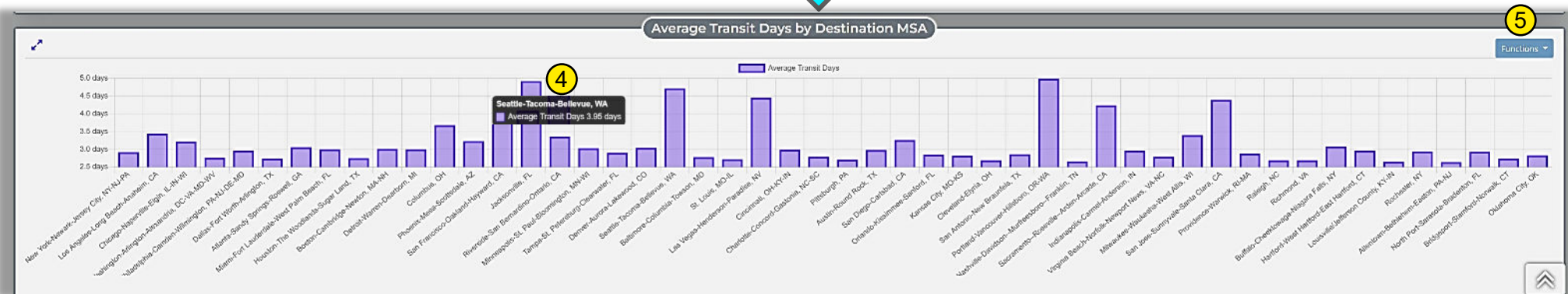
## At Carrier Performance by Destination MSA chart:

1. Select an **MSA** location at the drop-down menu or an increment of **50**. (Updated MSA data will be reflected in the chart **Average Transit Days by Destination MSA** - scroll down to view.)
2. Select and/or Deselect: **On Time, Late, Exception, Lost**.
3. Toggle by **Percent** or **Packages**.
4. Hover over data points for details.
5. Select **Functions** to Export data.

To change filter views at the top of the Dashboard refer to page 7.



↓ Scroll Down



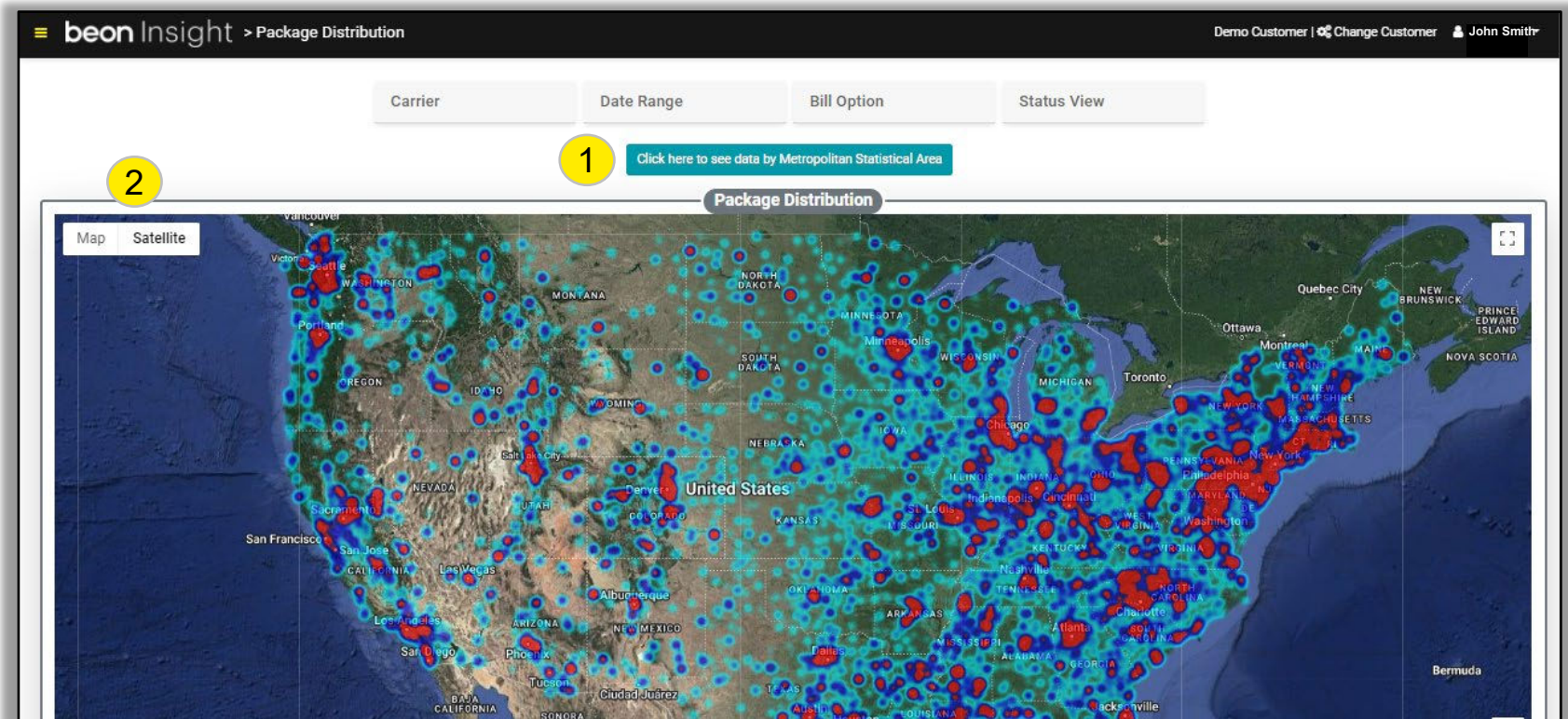
# Operational | Package Distribution

Heat map of client-specific MSA (Metropolitan Statistical Area) data.

Use filters at the top of the Dashboard to further enhance data. *To modify filter views at the top of the Dashboard refer to page 7.*

- To Zoom in on the map: Press CTRL + Scroll

- Return to **Metropolitan Statistical Area (MSA) Data** Dashboard.
- Choose Map view: **Map**> Terrain or **Satellite**.



# Operational | Weight Analysis By Ship Date

Dissect cost, package count, percent of packages, average weight, accessories, and average cost by weight groups.

Use filters at the top of the Dashboard to further enhance data. *To modify filter views at the top of the Dashboard refer to page 7.*

At the **Weight Analysis** chart:

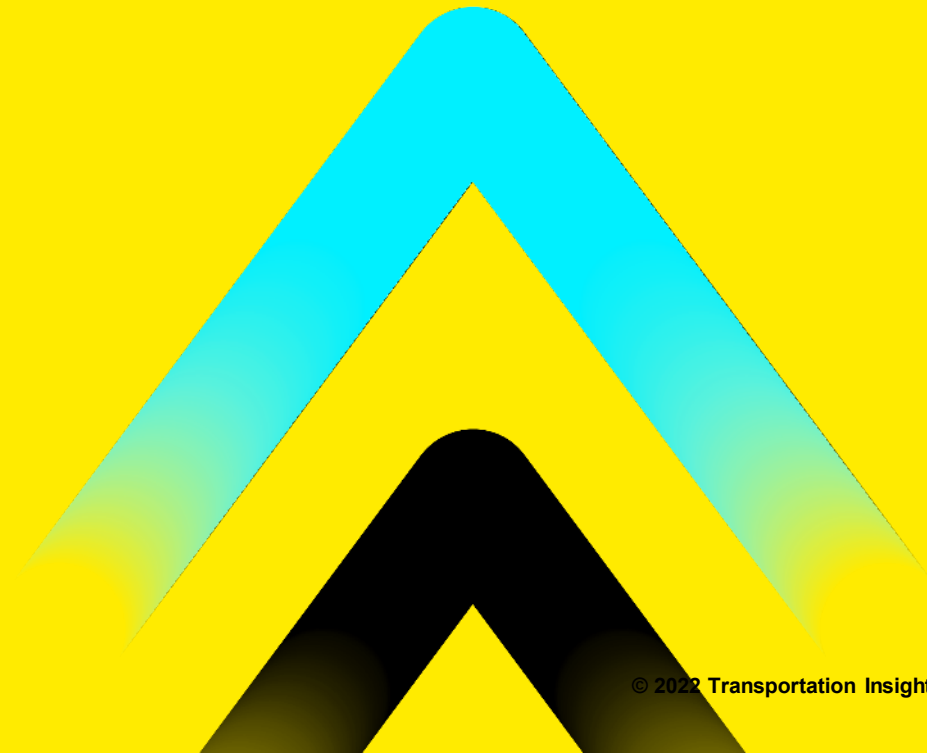
1. To generate a report click **See Detail** to the right of the chart title. A new page will appear.
2. At the new page, select **Date Selection** and **Carrier Selection** options.
3. Select **Execute Report**.

The image shows two screenshots from the beon Insight application. The top screenshot is the 'Weight Analysis by Ship Date' dashboard. It features a navigation bar with the beon Insight logo, a breadcrumb trail, and user information. Below the navigation are filter buttons for Carrier, Division, Group, and Date Range. The main content area is titled 'Weight Analysis' and contains a table with eight columns representing different weight groups. A 'See Detail' button is located to the right of the table. The bottom screenshot is the 'Weight Analysis Detail' page. It has a search bar and user information at the top. The main title is 'Weight Analysis Detail'. Below the title are two sections: 'DATE SELECTION' with buttons for 'PREVIOUS WEEK', 'PREVIOUS MONTH', 'MONTH TO DATE', 'YEAR TO DATE', 'DAYS BACK', and 'CUSTOM'; and 'CARRIER SELECTION' with buttons for 'ALL CARRIERS', 'FEDEX EXP.', and 'UPS'. An 'Execute Report' button is located in the top right corner of the detail page.

Weight Group	Cost	Pkg	%Pkg	Avg Wgt	Acc	Avg Cost
1-5	\$66,375.45	3,468	51.14%	2.6 lbs	\$2.00	\$19.14
6-10	\$26,740.37	1,175	17.33%	7.6 lbs	\$2.21	\$22.76
11-20	\$32,915.81	1,310	19.32%	14.6 lbs	\$2.70	\$25.13
21-30	\$13,366.79	442				
31-40	\$13,540.92	295				
41-50	\$8,947.05	67				
51-60	\$3,875.64	24				
61-70	\$45.20	1				

# Support

*Please contact your Account Manager for additional assistance.*



**Thank you**

