[Parcel Help](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/)

# Getting Started with Parcel Spend Intelligence (PSI)

## Welcome!

This help site contains instructions to help you uncover outliers, prevent overpayments, and unlock internal optimizations that boost your margins. Search topics or explore the menu navigation.

# Log in and Sign Out

### Log in

1. Go to [psi.transimpact.com](http://psi.transimpact.com/).
2. Enter your **Microsoft Single Sign-On (SSO)** credentials.

You may need to authenticate your account using the Microsoft Authenticator app.

### Log Out

From the top menu bar, click **Logout**.

# Basic Navigation

If you do not have access to a feature, the icon will be blacked out. Contact your Contact your Client Success Manager to purchase the feature.

### Navigation Icons

|  |
| --- |
| **Back to Primary Report (From Drill Through)** - When using the drill through option to open a sub report, the back arrow takes you back to the primary report. |
| **Drill-Up / Drill-Down / Expand Icons** – When using a most visualizations, you will see some icons appear when you hover your mouse on the visual. These are drill downs / drill ups that allow you to go up or down a level in the data. These perform the same as the expand and collapse buttons above. And will also be covered below in the drill down section below. |
| **Filter Icon** – When using table visualization, you will see a few options. The funnel icon being highlighted will show you the active filters applied to that visualization. |
| **Report Navigation (Main Screen)** – Selecting a button like this takes you from the home screen to the report you have selected. |
| Click to use Bolt, your AI-powered parcel spend assistant. Refer to [Ask Bolt](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/ask-chatbot). |
| **Back to Main Screen Icon** – Icon on primary report in the upper left corner. Click to return to the navigation screen. |
| **Pop Out Icon**- When using a table or matrix you will see this option. When selected, it will expand the current visualization to full screen. |
| Click **Feedback** to provide information regarding a problem or question.   1. Type issue and if applicable provide screenshot. 2. If applicable, click **Record Video**. Click the steps showing the problem and then click **Stop**. Click **Attach**. 3. Click **Send Feedback**. |
| **Shipments & Packages Icons** – These icons will always be accompanied by each other. By clicking the truck icon or the package icon, the content in the visualizations will change from Shipment to Packages, respectively |
| **Trend Line Spotlight**- By clicking this icon on the Parcel Spend Overview report, the trend line will change to be that of the card you clicked on the trend line from. A picture example will be provided below in the spotlight section. |

### Navigation Features

The following table describes basic navigation:

Enlarges the table by opening it in a full screen dialogOpen

|  |  |
| --- | --- |
| **Feature** | **Instructions** |
| Beta | To view the Beta Home Page, click the **Join the Beta** toggle. Refer to [Beta Home Page \*\*New\*\*](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/beta-home-page).  Join Beta.png |
| Menu Bar | The top menu bar is where you can manage users, accounts, and start navigating the PSI Tool Sets.   * Invoices allows you Import and Export Data. * Settings allows you to manage Users, Carrier Credentials, Setup Account Groups, manage individual carrier Account Aliases and Groupings, manage Alerts and Sender/Receiver Groups. Based upon your user level, you can also add new PSI users, add, and manage carrier accounts, and create account groups. |
| Ellipsis | **Data Export and Sortation** – Clicking on certain visuals, such as data tables, allows you to sort or export data to a CSV file by selecting the **“…”** or ellipsis. This could be helpful if you wanted to send information, such as address corrections, to a non-user.  arrow.png  Example of Ellipsis Menu Options |
| Plus Sign | **Expand and Collapse** – Clicking the plus icon will expand summarized data in a table. Clicking the minus icon will roll up a level of granularity. These appear in certain tables. |
| Filter Pane | **Filters Pane** – By expanding the filters pane on the right side of the page you will be able to see all the available filters. A filter card highlighted white has been applied to the page. A filter card highlighted grey is an available filter option. By expanding any card, you will see the values you may filter on. When selected they will apply to the whole page and turn white.  Filter Pane.png |
| Drill Through | Many Visuals in Power Bi® offer the ability to show multiple levels of data. With the drill down feature, you can view sub reports. **Right-click**>**Drill Through**.  Drill Through.png  Example of Drill Through |
| Report Tool Tips | Tool tips appear when hovering over visual data elements to expose additional detail. Simply hover your mouse pointer over an element and the tool tip displays.  Example of tooltip.png  Example of Tooltip |
| FAQs or More Info | Click **FAQ** or **more info** hyperlinks to learn more.  More Info faq.png  Example of FAQs and More Info  FAQ.png |
| Tours | Click the question mark to open a tour.  Tours.png |
| Buttons | Buttons are often grey with an orange outline. They are used for navigation and filtering. They may change a visual, load a pre-defined report, or take you to another section.  Example of buttons.png  Example of Buttons |
| Toggles | A Toggle is an On/Off switch that can turn certain functions on, such as the shortcuts toggle.  Example of toggle.png  Example of Toggle |
| Spotlighting | Spotlighting brings a visual front and center. Spotlighting can also be used to change a graph within a report, such as the Key Performance Indicators (KPIs) graph on the Spend Overview. Where you see the Rising Graph Icon next to a KPI, you can click, and the action will change the graph within the report to show that KPI Trending over time.  Trendline.png |

The following are printable quick starts guides to use as a reference while learning Avercast. Click link to view pdf. Click print

print.png

or save

save.png

Data in pdf:

## **Overview of Scheduled Reports**

Scheduled Reports are a powerful feature that allows you to receive automated reports of your data. You can choose to have these reports delivered in a format of your preference or in one of our standard specifications. These reports can be scheduled to arrive monthly, weekly, daily, or on an ad-hoc basis. They can be sent to various destinations, including email, SFTP, and popular cloud providers.

## **Accessing and Managing Scheduled Reports**

To access scheduled reports, navigate to **Invoices > Scheduled Reports** from the top menu bar. In previous versions, this option was referred to as "Export CSV" and is still accessible.

### **Viewing Report History**

You can review previously run reports by clicking **View Scheduled Report History**.

### **Understanding Report Icons**

The following icons, located at the end of rows, provide specific functionalities:

* **Default PSI Export:** These reports can be customized and exported, but you cannot delete them or save modifications. To export a Default PSI export to CSV, click **Customize Standard Export**. This was the old reporting page.
* **View Details:** Click this icon to edit a scheduled report or its schedule.
  + If it's a **Default PSI export**, click **Customize Standard Export** to export to CSV (this was the old reporting page).
  + If it's **not a default report**, click **Edit Export** to modify its details, then click **Save**.
* **Download Data:** Click this icon to download the report data. Complete the **Date Field**, **Start Date**, and **End Date** fields, then click **Download Data**.
* **Edit Schedule:** Click this icon to modify the schedule details. Make your changes and click **Save**.
* **Delete/Delete Schedule:** Click either of these options to delete a report or its schedule.

## **Creating and Running Reports**

### **Creating a New Scheduled Report**

To create a new report, click **Create New Scheduled Report**. You'll need to complete three sections: **Report Details**, **Add Columns**, and **Add Conditions** (optional). After filling out these sections, click either **Preview** or **Save**. If you make a mistake and want to remove a selection, click **Delete** at the end of the corresponding added column or condition.

* **Report Details:** Type a **Name** and **Description** for your report.
* **Add Columns:** Select desired columns from the drop-down menu. To add more, click **Add New** and repeat the selection process.
* **Add Conditions (optional):** Select fields from the drop-down menu. Additional fields will display, allowing you to select specific conditions. To add more conditions, click **Add New** and repeat the selection process.

If you click **Save**, the **Schedule** window will appear. Here, you'll need to complete the **Frequency**, **Delivery Method**, **Email(s)**, and **Format**. Click **Save** to finalize. If you click **Skip to schedule later**, the report will appear in the **Ad-Hoc Reports** section.

### **Running an Export Now**

To run a report immediately, click the **Run export now** icon. Complete the **Date Field**, **Start Date**, and **End Date** fields, then click **Run Export Now**.

## **Scheduling Ad-Hoc Reports**

Ad-Hoc Reports are reports that were saved without a schedule. To schedule an Ad-Hoc report:

1. Navigate to the **Ad-Hoc Reports** section of the Scheduled Reports screen.
2. Click the **Schedule Report** hyperlink on the row of the desired report.
3. Complete the **Frequency**, **Delivery Method**, **Email(s)**, and **Format**. Click **Save**.

Once scheduled, the report will move from the Ad-Hoc Reports section to the Scheduled Reports section.

PDF data over.

# Ask Bolt

Bolt is your AI-powered parcel spend assistant.

To ask Bolt a question:

1. From the Home page, click the Bolt icon at the bottom-right corner of the screen.

U,{56221b7a-4a29-4d0d-b2e6-81c43892a2dd}{138},3.125,3.125

Click to Ask Bolt

1. If this is the first time using Bolt, review the terms of use and click **Opt In**. AI is trained on our models, not the data in the models. Your data is secure.

U,{56221b7a-4a29-4d0d-b2e6-81c43892a2dd}{167},3.125,3.125

See step 6 to Opt Out if needed.

1. Click one of the suggested questions or type a message in the field and press **Enter**. The Chatbox displays thinking icon

U,{56221b7a-4a29-4d0d-b2e6-81c43892a2dd}{196},0.6666666666666666,0.6666666666666666

and then displays answer. If needed, click

U,{56221b7a-4a29-4d0d-b2e6-81c43892a2dd}{209},0.6666666666666666,0.6666666666666666

to expand the screen.

U,{56221b7a-4a29-4d0d-b2e6-81c43892a2dd}{223},3.125,3.125

Question Tips:

* Ask one question at a time.
* If you want to view the data use the words “show with details” in your question.
* To view a graph after you have asked a question, type “give me this in a pie chart or bar chart.”
* You can also indicate what not to include, for example, “Give me this in a pie chart but do not include No Exception Group.”

U,{ba6969bc-a991-4dd4-bd88-12ffbe048efb}{19},3.125,3.125

Bolt Window

1. If the results contain a table or graph, click the clipboard icon

U,{ba6969bc-a991-4dd4-bd88-12ffbe048efb}{47},0.6666666666666666,0.6666666666666666

to copy and paste into a document.

U,{ba6969bc-a991-4dd4-bd88-12ffbe048efb}{60},3.125,3.125

Example Copy Data Results

Example of data pasted into a word doc:

U,{ba6969bc-a991-4dd4-bd88-12ffbe048efb}{79},3.125,3.125

Pasted Data

1. (Optional) Rate the answer you received to help Chatbot learn. Click the **smiley face** that best represents how satisfied you are with the chatbot’s answer.

U,{ba6969bc-a991-4dd4-bd88-12ffbe048efb}{107},3.125,3.125

Feedback Smiley Faces

1. (Optional) Click the feedback description that best describes your experience. You can change your smiley face choice if needed. If desired, click into the comments box and type additional feedback. Click **Send**.

U,{ba6969bc-a991-4dd4-bd88-12ffbe048efb}{135},3.125,3.125

Feedback Details

1. To view options such as history, click the hamburger icon next to the message field. Click desired option.

U,{ba6969bc-a991-4dd4-bd88-12ffbe048efb}{163},3.125,3.125

Settings

# Beta Home Page \*\*New\*\*

Switch to the new home page and explore features. The new design provides at a glance insight, quick access to commonly used reports, and actionable data.

1. Click **Join the Beta** at the top of the current home page.

Join the Beta

1. The Parcel Suite Home Page displays. The following numbered graphic and corresponding table describe key features.

Beta Home Page

Enlarges the table by opening it in a full screen dialogOpen

|  |  |  |
| --- | --- | --- |
|  | **Feature** | **Description** |
| 1 | Filter Bar | Global filter bar persists throughout the various report screens. |
| 2 | Carrier Invoiced Amount | Top 7 Key Performance Indicators (KPIs) determined by your company surveys. |
| 3 | Service Overview | Carrier agnostic and sender/receiver heat map. |
| 4 | Actionable Insights Overview | Top 6 most impactful actionable insights by dollar amount. Click the View All Actionable Insights to view more data. Refer to [Actionable Insights](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/actionable-insights) .  Click **View More Info** hyperlink to view an explanation of the value and suggested remedy. |
| 5 | Vertical Navigation Menu | To expand the names of the navigation menu, click the arrow at the top of the bar.  Expand Side Navigation Menu  Use the following chart to locate submenu screens.  Vertical Menu Reports |
| 6 | Bolt | Your AI-powered parcel spend assistant. Refer to [Ask Bolt](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/ask-chatbot) |

1. To opt out click **Beta mode** at the top of the Home Page.

Opt Out Toggle

# Actionable Insights

The Actionable Insights page serves as a hub for multiple in-depth Sub Reports, organized into four distinct tabs, each tailored to align with specific characteristics of the shipper’s operations. These tabs provide focused reports that offer insights into various performance metrics, shipping trends, and cost drivers unique to the shipper’s profile. Each Sub Report includes detailed scores and color-coded indicators, which are benchmarked against other PSI users. These visual cues allow shippers to quickly assess areas of strength and potential improvement, enabling them to take targeted actions to optimize their shipping strategies and improve operational efficiency.

Each actionable Insight is scored individually as a comparative performance of your data against other TransImpact customers on a scale of 1 to 10.

**Actionable Insight Group Scores** are calculated using a weighted average based on relevant carrier spend.  
For example, if a particular Actionable Insight only applies to FedEx and you only ship 5% of total packages with FedEx, then this Actionable Insight will carry little weight in your group score. The Group Score displays next to the tab title.

Group Score

Click **FAQs** or **More Info** hyperlinks for additional information.

Additional Information

1. Click **Actionable Insights**.

From the Beta Homepage, click the **View All Actionable Insights**. Can also be accessed through the side Navigation Menu, click **Operational Analysis>Actionable Insights**.

1. If desired, change the carrier **Invoice Date** range.
2. The **3rd party communications** tab displays.
   1. Click insight box to view report if applicable.
   2. Click Back arrow icon

to return to Actionable Insights.

3rd Party Communication

1. Click **Avoidable Charges/Carrier Issues** to open insights.
   1. Click insight box to view report if applicable.
   2. Click Back arrow icon

to return to Actionable Insights.

If applicable, use side scroll bar to view additional insights.

Avoidable Charges

1. Click **Charge Corrections** to open insights.
   1. Click insight box to view report if applicable.
   2. Click Back arrow icon

to return to Actionable Insights.

Charge Corrections

1. Click **Process Improvements** to open insights.
   1. Click insight box to view report if applicable.
   2. Click Back arrow icon

to return to Actionable Insights.

Air to Ground is a recently added insight.

Process Improvements

# Grid Navigation

The following table describes ways to sort and view information in grids.

Enlarges the table by opening it in a full screen dialogOpen

|  |  |
| --- | --- |
| **Feature** | **Description** |
| Expand Row | If a row item has a + sign, it can be expanded. Click the + sign to expand and the - sign to collapse.  Example of Expanded Plus Sign  Some screens may have arrows to expand/collapse such as GL Coding.  Example of Expanded Arrow |
| Filters | Click side arrow to expand and select filters.  Expand Filters  The filters under the heading Filters on all pages will carry throughout the application. The filter(s) display orange and stay expanded when you navigate to another screen.  Example of Filters on All Pages |
| More Options | The upper right corner of grids contains additional options. You may have to hover over the section to display.  This is also available on other graphics like a bar graph.  Grid Options  The “…” or ellipsis contains additional options such as Export Data.  Example of Ellipsis Menu Options |
| Right-Click | Right-click on grid data displays additional items such as copy and drill through. Drill through options change depending on the data being viewed.  Example of Right-Click Options |
| Select Grid Row | If you select a row in a grid the other visual data on the page (such as a bar and line graph) changes for the specific selection.  This is also true of selecting a portion of a bar or line graph. The grid data will change to reflect the selection. |
| Sort Columns | At the top of each column there is an arrow to sort. Click arrow to change.  Example of Grid Sort Arrow |

# Settings

Use the setting options to manage accounts and GL Coding.

# My Account

This allows you to change your password, e-mail of record, and username.

1. Click **Settings>My Account**.
2. To change password, enter the same password in the **New Password** and **Confirm Password** field.
3. Edit fields as needed, click **Save Changes**.

# Add a User

Only users who are owners can create new users, delete users, manage accounts and groups, and access Contract Edge.

1. Click **Settings>User**.
2. Click **Add User**.

Add ser

1. Complete field and click **Save** **User**.

Add User Fields

### Edit User

1. Click **Edit** next to the desired name.
2. Change either **Time Zone** or **User Type**.
3. Click **Save User**.

Edit User

### Delete User

1. Click **Delete** next to desired name.
2. Click **OK**.

Confirmation Message

# Manage Carrier Accounts

### Carrier Logins

Though your account is typically beginning with everything already loaded, you may need to change accounts, add accounts, or change passwords as needed. The last import date displays the last time the account successfully logged in and processed data. You can edit if a password has changed or delete if the login is no longer needed/valid.

Account logins must have access to the billing and invoicing data for the carriers; specifically, the areas where you can request a raw data download. This typically requires enrollment in electronic billing with the carrier. Contact your Success Manager with questions on how to do this if you need help.

1. Click **Settings>Carrier Logins**.
2. Click **Add Login**.

Carrier Logins

1. Enter fields and then click **Save Login**.

Add Carrier Login

### View Carrier Account Groups

1. Click **Settings>Carrier** **Accounts**. A list of carriers displays.
2. To change the account group, click the corresponding **Account Group** drop-down and select.

Account Group Drop-Down Options

1. To change the address, click the location icon

. Edit fields and click **Submit**.

A red icon indicates no address entered.

Change Address Fields

1. Once you’ve completed edits, click **Save Changes**.

Save Changes

### Add Carrier Group

1. Click **Settings>Carrier Account Groups**.

Menu Navigation

1. Click **Add Group**, a new line displays. Type a name for the new group.
2. Click **Save Changes**.
3. To delete a group, click the trash icon

next to the line you wish to delete.

# Manage Alerts

Use the alerts feature to prevent fraud. This function quickly highlights when a package or cost appears suspect, so corrective action can be swift. Since not all fraud is the same, alerts can be customed based on your specific business and shipping patterns.

An email is sent out once a week indicating alerts that were triggered.

Weekly Alert Email

### Add a New Alert

1. Click **Settings>Alerts**.

Click link to watch video <https://www.youtube.com/watch?v=8AxC-LpoJW8>.

1. Scroll to the bottom of the page and click **Add New Alert**.
2. Complete fields and click **Save**.
   1. To add filters, click **ADD**.
   2. Click **Calculate Last Weeks Value** to test the alert.

Add Alert Fields

### Edit Alerts

1. Click **Edit** from the alert row.

Edit Alerts

1. Edit fields as need.
2. Click **Calculate Last Week’s Value** to test changes.
3. Click **Save**.

### View Alert History

1. Click **History** from the alert row. A grid displays data from the alert.

Alert History Example

1. Click value field hyperlink to view more details.
2. Scroll to the bottom of the page and click **Back**

to return to the Manage Alerts screen.

# Sender/Receiver Groups

Send/Receiver groups allow you to create custom groups.

## Create Group

1. Click **Settings>Sender Receiver Groups**.

From the Beta Home page side navigation menu, click **Settings**>**Sender Receiver Groups**.

1. The Sender/Receiver Group page displays.
2. Click **Create New**.
3. In the category section select the radio button for **Sender** or **Receiver**.
4. The **Field** and **Qualifier** fields are pre-populated to set up a new filter with **Name** and **Starts with.** Leave these as is.
5. Type the name of the group you are creating in the **Filter** field.
6. If needed, click the **Add Filter** hyperlink to add an additional filter. Repeat steps a-c for the additional filter.
7. Click **Preview**.
8. Click **Create**.
9. Enter the Name of the Group.
10. Click **Save**.
11. Click **Refresh Reports**.
12. Click **Start Refresh**.

## Edit Group

1. Click **Edit** on corresponding row.
2. Make changes to the filter(s).
3. Click **Preview** if needed.
4. Click **Update**.

## Delete Group

1. Click **Delete** on corresponding row.
2. Click **OK** to delete. The group is removed from the Sender/Receivers Group page.

# General Ledger (GL) Coding

You must have the Enterprise subscription with role for the GL Code functionality. Contact your Client Success Manager to learn more.

The GL coding functionality allows you to assign GL Codes to specific charges based on specific rules created. These rules are applied to all new charges that flow through the PSI system and can be exported from PSI to then be loaded into your General Ledger system. Use this functionality to create, manage, and apply GL codes.

1. Click **Settings>GL Codes**. The existing GL codes display, toggle between Chart of Accounts 01 and Chart of Accounts 02. You are allowed two Chart of Accounts.
2. To change the priority of the GL codes, there are two options:
3. To create a GL Code Rule:
   1. Click **Add GL Code Rule**.
   2. Complete fields refer to the following table:

|  |  |
| --- | --- |
| Add Condition (Type, Operator, and Value) | To add a condition:   1. Select the **Type**. 2. Select the **Operator** that indicates how the type and value should be compared (equal, contains, etc.). 3. Depending on the type, the value field may be a text box instead of drop-down options. You may also be able to select more than one value from the drop-down. Select or enter the **Value(s).** If the field is a text box:    1. Type text.    2. Click green checkmark to add. The text displays underneath the value field. If needed, click X to delete the value.    3. Repeat steps a-b for as many values as are needed.   Example of Text Value   1. Click +**Add condition to list below**. The condition displays at the bottom of the table with the associated values.   To edit, click the pencil  . If needed, click trash  to delete.   1. Repeat steps 1-4 to add as many conditions as needed. |
| Alias (Required) | Type a description that describes the rule. |
| Apply radio buttons | Select how to apply the conditions either **all** conditions must apply or **any** of the conditions can apply for the rule (at least one rule must be met). |
| Carrier | Carrier associated with the rule can have all carriers or a single carrier. Select from drop-down. |
| Chart of Accounts (COA’s) | Enter the COA (either 1 or 2). If your company only has one chart of Accounts this defaults as 1. |
| Description | Allows you to type a longer description then the Alias. |
| GL Code Value (Required) | Type the GL code associated with rule. |

c. Click **Add GL Code Rule**.

1. To edit GL code rule:
   1. From the grid, click the **Alias** or **GL Code** hyperlink in the grid.
2. Edit fields as needed.
3. Click **Update GL Code Rule**.

To generate unmapped shipments report for transactions not associated with GL codes and run newly created rules:

1. Click **Exception Reporting**.
2. To view all columns, click **Show All Columns.**
3. Click **Run GL Code Rules**. Depending on the number of records this process may take some time, sometimes up to an hour.
4. Enter the **Start Date** and if desired an **End Date** (optional).
5. Click **Save**.
6. To view GL code data associated with charges:
   1. Create a custom report using the **Charge GL Codes** option in the Data column. Refer to [Custom Reports](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/custom-reports).

# Custom Reports

1. Click **Invoice Analytics>Custom Reports**.
2. Click **Create a New Report**.
3. Expand **Data** folders and select or dragged desired data to the white space (canvas).
4. Change the image by selecting from the **Visualizations** column.
5. In the Filters column, expand filters in use and select from options.
6. Click into a different section of the canvas to add additional data and visuals.
7. Select options at the bottom of the page:
8. Once you have created all the data needed for the report, click **Save**.
9. Click **View** to select how the report data displays
10. Click **File**>**Save** **As** and type a name for the report. Click **Save**.
11. Click **Invoice** **Analytics>Custom Reports**. The name of the report created appears in a table. Use the following icons to manage report:
12. To upload to your GL system. Refer to [Export to CSV](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/export-csv).
    1. For CSV format, you must select **One line per Charge**.
    2. The exported file’s last column contains the GL Code Value.

# Manually Upload Invoices

From the invoice menu option, you can manually upload invoices or schedule reports.

## Manual Upload Invoices

Upload your CSV or PDF carrier invoices by either dragging and dropping them onto the file list or by clicking the button to browse and upload a single file. Your CSV files will be immediately validated, and if accepted, your reports will be updated in a few minutes. PDF uploads will not be reflected in your reports until the next load of a CSV file. The list of files below only represents loaded CSVs, it does not include PDF files and CSV files in process of loading. Typically, carrier data will be in a .csv file extension, but .txt and .xlsx are also supported.

1. From the top menu bar, click **Invoices>Manual Upload**.

Manual Upload is currently not accessible from the Beta Home page.

1. Click **Choose Files**.
2. Select file.

# Export CSV

The following instructions explain how to export invoices.

1. Click **Invoices>Export CSV**.
2. Select **Invoice Date Range**.
3. Select **Accounts**.
4. Select **CSV Format**.

To view GL codes, you must select **One line per charge**.

1. Click **Export**.
2. Click **Open File** link.

# Financial and Operational Analysis Reports

The following table describes reports available in PSI.

Enlarges the table by opening it in a full screen dialogOpen

|  |  |
| --- | --- |
| **Report** | **Description** |
| Parcel Spend Overview | Provides a detailed breakdown of overall parcel spend. It helps monitor spend by account group and account. |
| Invoice Summary | High level view of invoices. Can open PDF invoice. |
| Period vs Period Analysis | Use to identify trends of your cost based on specific time periods. |
| Carrier Analysis | Compare and contrast carriers. |
| Audit Analysis | Provides a comprehensive breakdown of audit refund details, highlighting discrepancies and errors identified in carrier invoices. It offers insights into the specific types of billing issues—such as late deliveries, duplicate charges, or overcharges—that qualify for refunds. |
| Receiver/Sender Analysis | The Receivers/Senders report allows shippers to review their data by Receiver or Shipper, providing insight into where packages are going, using what services and accounts. Use this report to isolate inbound and 3rd Party shippers. |
| Accessorial Analysis | Provides shippers with detailed insights into the full impact of accessorial charges—such as fuel surcharges, residential delivery fees, and additional handling costs—on their overall shipping expenses. This report breaks down accessorial fees by shipment, carrier, and service type, allowing businesses to identify which charges contribute most to their shipping costs. |
| Dimensional Analysis | The Dimensional Analysis report provides shippers with a comprehensive view of all shipments impacted by dimensional weight pricing. This report highlights shipments where the DIM weight exceeds the actual weight, leading to increased shipping costs based on package size rather than its physical weight. |
| Time in Transit | Provides shippers with detailed insights into the delivery times of their packages, measured in both business days and calendar days. This report breaks down transit times by carrier, service level, and shipment destination, allowing users to assess the efficiency of their shipping operations. |
| Incentive Analysis | Provides shippers with a comprehensive review of carrier-provided incentives, broken down by service level and account number. It offers detailed insights into discounts, enabling users to track how these benefits impact their overall shipping costs. |
| Hundredweight/Multi-weight | Provides shippers with critical metrics specifically related to multi-piece shipments that qualify for UPS Hundredweight or FedEx Multiweight pricing. This report highlights key performance indicators, such as total shipment weight, the number of pieces per shipment, and the resulting shipping costs associated with each multi-piece order. |
| Parcel Cost Variance *(Additional Cost)* | Compare expected shipping costs with actual shipping costs. |
| Parcel Margin Analysis (PMA) *(Additional Cost)* | This connects users to PMA reports. PMA reports deliver profitability insights on your customer, the order, and products fulfilled, through reports and dashboards that expose the details necessary to drill, discover, and decide. |

# Parcel Spend Overview

The Parcel Spend Overview page provides a detailed breakdown of overall parcel spend. It helps monitor spend by account group and account. Drill Throughs include Zone Analysis, Account Detail, Accessorial Detail.

1. From the Home page, click **Parcel Spend Overview**.

From the Beta Home page Vertical Navigation Menu, click **Financial Analysis**>**Parcel Spend**.

1. The Parcel Spend Overview page displays. The following numbered graphic describes features.
2. To filter information:
3. Select **Carrier Invoice Date**.
4. In the **Where do we ship the most**, you can select from **USA**, **Canada**, or **Intl**. to change the data. The map itself is interactive. For example, click on a state to see data.
5. Right-click grid to drill through data, refer to [Grid Navigation](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/grid-navigation).
6. Click side arrow to expand and select filters.
7. Trend Analysis
8. View sub report to understand cost drivers and KPI’s.
9. Tip: Filters are the key to making this page powerful. Review Accounts, Services, Package Characteristics, etc.

Click **Trend Analysis** to view the Trend Analysis data. Change **Carrier Invoice Date fields** as needed.

2. If needed, click side arrow to expand and select filters.

Click the back arrow to return to Parcel Spend Overview

# Invoice Summary

The Invoice Summary Report provides a comprehensive overview of key invoice information. Users can drill-down into individual entries to access more detailed information such as cost by tracking number, charges not associated with a package and charge by classification. This allows for a deeper analysis of each invoice, facilitating more accurate tracking and reporting.

1. From the Home page, click **Invoice Summary**.

From the Beta Home page Vertical Navigation Menu, click **Financial Analysis**>**Invoice**.

1. The Invoice Summary page displays. The following numbered graphic describes features.

To filter information:

1. To see a specific invoice number (s), select from top drop-down menu.
2. Example of Invoice Number Drop-Down Options
3. Select **Carrier Invoice Date**.
4. Right-click grid to drill through data, refer to [Grid Navigation](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/grid-navigation).
5. Click side arrow to expand and select filters.

# Period vs Period Analysis

The Period vs. Period Analysis enables a detailed comparison between historical parcel data and KPI’s. This feature allows users to assess changes in metrics such as carrier invoiced amount, average cost per shipment, and average accessorial cost across different time periods. By analyzing historical trends against current performance, businesses can identify improvements, areas of concern, and patterns in parcel management, providing valuable insights for optimizing operations and decision-making.

1. From the Home page, click **Period vs Period Analysis**.

From the Beta Home page Vertical Navigation Menu, click **Financial Analysis**>**Period vs Period**.

1. The Period vs Period Analysis page displays. The following numbered graphic describes features.

To filter information:

1. Select from the **Date Selection** drop-down options.
2. Click side arrow to expand and select filters.

# Carrier Analysis

The Carrier Analysis report offers in-depth visibility into the usage and associated costs of each carrier used by your business. It breaks down key metrics such as shipping volumes, average cost per shipment, and average cost per package for each carrier.

1. From the Home page, click **Carrier** **Analysis**.

From the Beta Home page Vertical Navigation Menu, click **Financial Analysis**>**Carrier Analysis**.

1. The Carrier Analysis page displays. The following numbered graphic describes features.

Tip: Change the visuals on the page by clicking either the package or delivery truck icon.

1. To filter information:
2. Select **Carrier Invoice Dates**.

In the **Which Carriers do we ship the most Packages?** Select a carrier to view data. The following example shows Loomis selected.

1. Click side arrow to expand and select filters.

## Actual Net Rates

The Carrier Analysis sub-report highlights carrier-specific rate information by carrier, zone and weight with all fees included. performance trends, service levels, and any applicable surcharges or fees.

1. Click **Actual Net Rates**. The average Invoiced Amount by Zone and Weight page displays. Select from top drop-down filters as needed. You can right-click to drill through. Refer to [Grid Navigation](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/grid-navigation) .The following numbered graphic describes features.
2. If needed, click side arrow to expand and select filters.
3. Click the back arrow to return to the Carrier Analysis page.

# Audit Analysis

The Audit Analysis report provides a comprehensive breakdown of audit refund details, highlighting discrepancies and errors identified in carrier invoices. It offers insights into the specific types of billing issues—such as late deliveries, duplicate charges, or overcharges—that qualify for refunds. The report also includes the total amount of refunds secured, categorized by carrier, shipment type, and error type. This detailed analysis enables businesses to track the success of their audit processes, ensuring they recover any overpaid shipping costs and optimize their shipping expenses.

Tip: Sign up for FedEx Rewards.

1. From the Home page, click **Audit Analysis.**

From the Beta Home page Vertical Navigation Menu, click **Financial Analysis**>**Audit Analysis**.

1. The Audit Analysis page displays. The following numbered graphic describes features.

To filter information:

1. Change the **Refund Verified Date** fields.
2. Right-click on grid to drill through the data. Refer to [Grid Navigation](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/grid-navigation).
3. Click side arrow to expand and select filters.

# Receiver/Sender Analysis

The Receivers/Senders report allows shippers to review their data by Receiver or Shipper, providing insight into where packages are going, using what services and accounts. Use this report to isolate inbound and 3rd Party shippers. Use the avg. Cost per package information to isolate anomalies and monitor who is using what account for what purpose. Leverage Receiver/Sender grouping and, charge modifier filters. Drill Through into Sender/Receiver Detail, Address Grouping.

Tip: Use this report to Monitor 3rd Parties for Compliance

1. From the Home page, click **Receiver/Senders**.

From the Beta Home page Vertical Navigation Menu, click **Financial Analysis**>**Sender Receiver**.

1. The Receiver/Sender Analysis page displays. The following numbered graphic describes features.

To filter information:

1. Press **View as Sender** toggle button to change view. Press again to return to View as Receiver.

Select from **Sender** drop-down options.

Select **Carrier Invoice Date** fields

1. Right-click on a grid to drill through the data. Refer to [Grid Navigation](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/grid-navigation).
2. Click side arrow to expand and select additional filters.

# Accessorial Analysis

The Accessorial Analysis report provides shippers with detailed insights into the full impact of accessorial charges—such as fuel surcharges, residential delivery fees, and additional handling costs—on their overall shipping expenses. This report breaks down accessorial fees by shipment, carrier, and service type, allowing businesses to identify which charges contribute most to their shipping costs. Additionally, the report includes a toggle feature that enables users to switch between Receiver and Sender perspectives, offering a clear view of who is responsible for these charges. This analysis helps shippers better understand and manage accessorial costs, leading to more strategic cost-saving decisions.

1. From the home page, click **Accessorial Analysis**.

From the Beta Home page Vertical Navigation Menu, click **Financial Analysis**> **Accessorial**.

1. The Accessorial Analysis page displays. The following numbered graphic describes features.
2. To filter information:
3. Press **View as Sender** toggle button to change view. Press again to return to View as Receiver.
4. Select from **Sender** drop-down options.
5. Select **Carrier Invoice Date** fields.

4.Right-click on the grid to drill through the data. Refer to [Grid Navigation](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/grid-navigation).

5.Click side arrow to expand and select additional filters.

# Time in Transit

The Time in Transit Analysis report provides shippers with detailed insights into the delivery times of their packages, measured in both business days and calendar days. This report breaks down transit times by carrier, service level, and shipment destination, allowing users to assess the efficiency of their shipping operations. This enables shippers to identify trends, compare carrier performance, and pinpoint potential bottlenecks in the shipping process. With this information, businesses can make informed decisions to improve delivery speed and customer satisfaction.

1. From the Home page, click **Time in Transit Analysis**.

From the Beta Home page Vertical Navigation Menu, click **Operational Analysis**> **Time in Transit**.

1. The Time in Transit Analysis page displays. The following numbered graphic describes features.
2. To filter information:
3. Change the **Carrier Invoice Date**.
4. Right-click on grid to drill through the data. Refer to [Grid Navigation](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/grid-navigation).
5. Click side arrow to expand and select additional filters.

# Dimensional Analysis

The Dimensional Analysis report provides shippers with a comprehensive view of all shipments impacted by dimensional weight pricing. This report highlights shipments where the DIM weight exceeds the actual weight, leading to increased shipping costs based on package size rather than its physical weight. It includes detailed information such as the package dimensions, actual weight, DIM weight, and cost differential for each affected shipment. By analyzing these trends, shippers can identify opportunities to optimize packaging, reduce DIM weight charges, and improve overall shipping efficiency and cost management.

1. From the Home page, click **Dimensional Analysis**.

From the Beta Home page Vertical Navigation Menu, click **Operational Analysis**> **Dimensional Analysis**.

1. The Dimensional Analysis page displays. The following numbered graphic describes features.

To filter information:

1. Press **View as Sender** toggle button to change view. Press again to return to View as Receiver.

Select from **Receiver** drop-down options.

Select **Carrier Invoice Date** fields.

1. Right-click on grid to drill through the data. Refer to [Grid Navigation](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/grid-navigation).
2. Click side arrow to expand and select additional filters.

# Incentive Analysis

The Incentive Analysis report provides shippers with a comprehensive review of carrier-provided incentives, broken down by service level and account number. It offers detailed insights into discounts, enabling users to track how these benefits impact their overall shipping costs. The report also includes the ability to analyze weekly trends, helping businesses monitor changes in incentive rates over time and evaluate how effectively they are leveraging these carrier agreements. This analysis empowers shippers to maximize savings and negotiate more favorable terms with their carriers.

1. From the Home page, click **Incentive Analysis**.

From the Beta Home page Vertical Navigation Menu, click **Financial Analysis**> **Incentive**.

1. The Incentive Analysis page displays. The following numbered graphic describes features.

3. To filter information:

1. Click either **FedEx** or **UPS**.
2. Select **Carrier Invoice Date** fields.
3. Right-click on a grid to drill through the data. Refer to [Grid Navigation](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/grid-navigation).
4. In the **Are our Discounts by Service consistent across invoices** graph, choose either **Discount%** or **% of pkgs shipped at the minimum** to change displayed data.
5. Click side arrow to expand and select additional filters.

# Hundredweight/Multi-weight

The Hundredweight/Multiweight report provides shippers with critical metrics specifically related to multi-piece shipments that qualify for UPS Hundredweight or FedEx Multiweight pricing. This report highlights key performance indicators, such as total shipment weight, the number of pieces per shipment, and the resulting shipping costs associated with each multi-piece order. By analyzing trends over time, shippers can identify patterns in their shipping practices, optimize their multi-piece shipments, and make strategic decisions that enhance efficiency and reduce overall shipping expenses.

1. From the Home page, click **Hundredweight/Multiweight**.

From the Beta Home page Vertical Navigation Menu, click **Financial Analysis**> **Hundredweight/Multiweight**.

1. The Hundred/Multiweight Analysis page displays. The following numbered graphic describes features.

3. To filter data:

1. Select **Carrier Invoice Date** fields.
2. Right-click on a grid to drill through the data. Refer to [Grid Navigation](https://parcel-help.scrollhelp.site/parcel-help/Data-Center/grid-navigation).
3. Click side arrow to expand and select additional filters.

# Parcel Cost Variance

This is an add on feature available for additional cost. Contact your Client Success Manager (CSM) to learn more.

With Parcel Cost Variance, you can see your total shipping costs in seconds. From expected costs to the carrier invoice amount, and even how much you billed your customers for shipping. Parcel Cost Variance also provides your total expected cost vs. invoiced amount difference by amount and percentage, as well as order count and billed to customer total vs. invoiced amount.

1. From the Home page, click **Parcel Cost Variance**.

From the Beta Home page Vertical Navigation Menu, click **Cost Variance.**

1. Review data. The following numbered graphic and corresponding table explain how to filter and view data:

|  |  |  |
| --- | --- | --- |
| Sub Reports | Click either **Dimension Variance** or **Variance Explorer** to view sub reports. Click back arrow to return to Parcel Cost Variance page. |  |
| 2 | Filter by Order Date | Click calendar icon to set order date range. Click eraser icon  Eraser.png  to clear selections. |
| 3 | Show All Orders | Click to show all orders, click again to show only orders with invoiced Amt. |
| 4 | Key Performance Indicators (KPIs) | Data is interactive. If you click on points online graph or grid, data changes to show selection specific KPIs. |
| 5 | Line Graph Hover | Hover line graph to show **Expected Cost vs Invoice Amount**, **Expected Shipping Cost**, and **Carrier Invoiced Amount**. |

# Parcel Margin Analysis (PMA)

This is an add on feature available for additional cost. Contact your Client Success Manager (CSM) to learn more.

This option allows users to access Parcel Margin Analysis (PMA) reports. PMA provides managers with the true profit margin on each product sold, considering gross margin, the total transportation expense required to service the order, and revenue capture in the order process, for example, flat rate shipping fees.

Previously, the PMA was on a separate Transimpact platform.

1. From the Home page, click **Parcel Margin Analysis (PMA)**.

From the Beta Home page Vertical Navigation Menu, click **Margin Analysis.**

1. The PMA screen displays. The following numbered graphic and corresponding table explain how to filter and view data:

|  |  |  |
| --- | --- | --- |
|  | Filters | Set filters as needed for **Date Selection**, **Invoice Date Range,** and **Organization**.  . |
| 2 | Parcel Margin Analyzer | Click to view the Parcel Margin Analyzer report. |
| 3 | Parcel Cost Missing Link | Click to view parcel costs that are unable to be linked to a sales order. |
| 4 | Parcel Cost True or False | Select **True** or **False** to include Orders with Parcel Cost. |
| 5 | Expand Grid Row | Expand data in the grids and click rows to view data. |
| 6 | See Invoice Detail | When a grid row is selected, the **See** **Invoice Detail** button displays. Click to view invoice. To view the Order Details screen, right click on the row, click **Drill Through>Order Details.** |

# Custom and Scheduled Reports

Use custom and scheduled reports to stay informed of your parcel shipping data and closely monitor your Key Performance Indicators (KPIs).

# Custom Reports

1. Click **Invoice Analytics>Custom Reports**.
2. Click **Create a New Report**.
3. Expand **Data** folders and select or dragged desired data to the white space (canvas).

Only drag and drop the lowest level data from the expanded hierarchy.

1. Change the image by selecting from the **Visualizations** column.
2. In the Filters column, expand filters in use and select from options.
3. Click into a different section of the canvas to add additional data and visuals.
4. Select options at the bottom of the page:
5. Once you have created all the data needed for the report, click **Save**.
6. Click **View** to select how the report data displays.
7. Click **File**>**Save** **As** and type a name for the report. Click **Save**.
8. Click **Invoice** **Analytics>Custom Reports**. The name of the report created appears in a table. Use the following icons to manage report:

# Scheduled Reports

Scheduled Reports allow you to receive scheduled reports of your data in a specification of your own choosing or in one of our standard formats.

These reports can be sent monthly, weekly, daily or Ad-Hoc to a variety of destinations including email, SFTP, and common cloud providers.

1. From the top menu bar, click **Invoices>Scheduled Reports**.

From the Beta Home page side navigation menu, click **Reporting>Schedule Reports**.

1. Created scheduled and Ad-Hoc Reports display.

Click **View Scheduled Report History** to review a list of previously ran reports.

1. The following table explains row icons.

### **View Details**

Click the **view details icon** to edit the scheduled report or schedule.

* If the report is a Default PSI export, click **Customize Standard Export** to export to CSV.
* If the report is not a default report, click **Edit Export** to edit the details of the report. Modify as needed, then click **Save**.

For scheduled reports, click **Edit Schedule** to edit the details of the schedule. Modify as needed, then click **Save**.

To delete the report or schedule, click either **Delete** or **Delete Schedule**.

### **Download Data**

Click the **download data icon** to download.

1. Complete the **Date Field**, **Start Date**, and **End Date** fields.
2. Click **Download Data**.

### **Run Export Now**

Click the **run export now icon** to run the report immediately.

1. Complete the **Date Field**, **Start Date**, and **End Date** fields.
2. Click **Run Export Now**.

# Glossary of Terms

|  |  |
| --- | --- |
| Accessorial Charges | Additional fees such as fuel surcharges, residential delivery fees, and additional handling costs added to the overall shipping expenses. |
| ASD | Air Shipping Document |
| BI (or Business Intelligence) | A technology-driven process for analyzing data and presenting actionable information to help executives, managers and corporate end users make informed business decisions. |
| Carrier | A company or operator that specializes in the freight transportation of goods from one location to another using trucks or trailers |
| Chart of Account (CoA) | A list of all a company's financial accounts, organized into categories and used to record transactions. It's a key part of a company's financial planning and analysis. |
| PLD | Package Level Detail |
| Shipping Weight | Refers to the total weight of a shipment, including the weight of all the associated packaging materials such as crates, boxes, containers and other necessary components. |
| Transit Time | The duration it takes for freight to travel from the point of pickup at the origin location to its final destination. It encompasses the entire period from when the freight is collected for transportation until it is delivered to the designated delivery location. Transit time is a crucial factor in logistics planning as it helps determine the expected timeline for shipments, allowing businesses and customers to make appropriate arrangements and meet their required deadlines. |