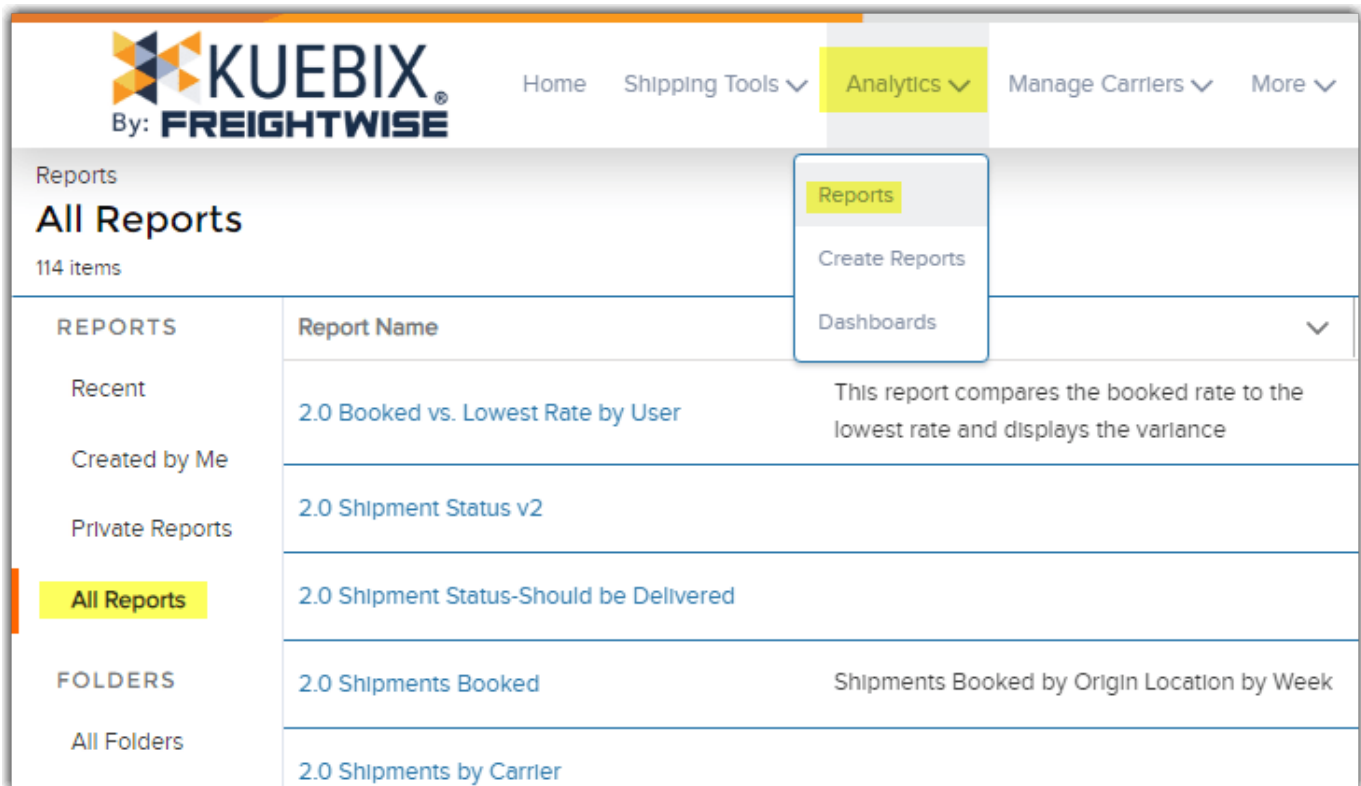


# Creating and Customizing Reports

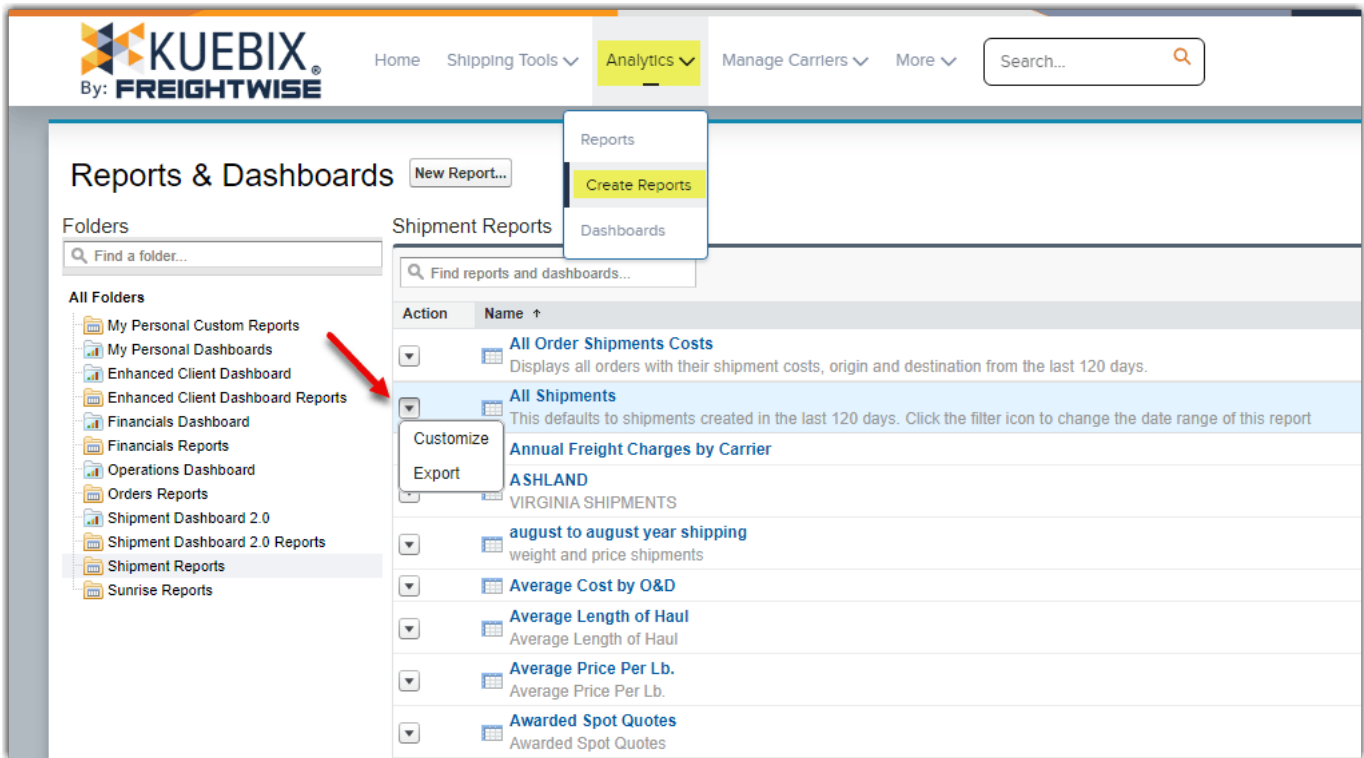
There are a number of premade reports available, accessed by clicking on the **Analytics** menu at the top of your screen.



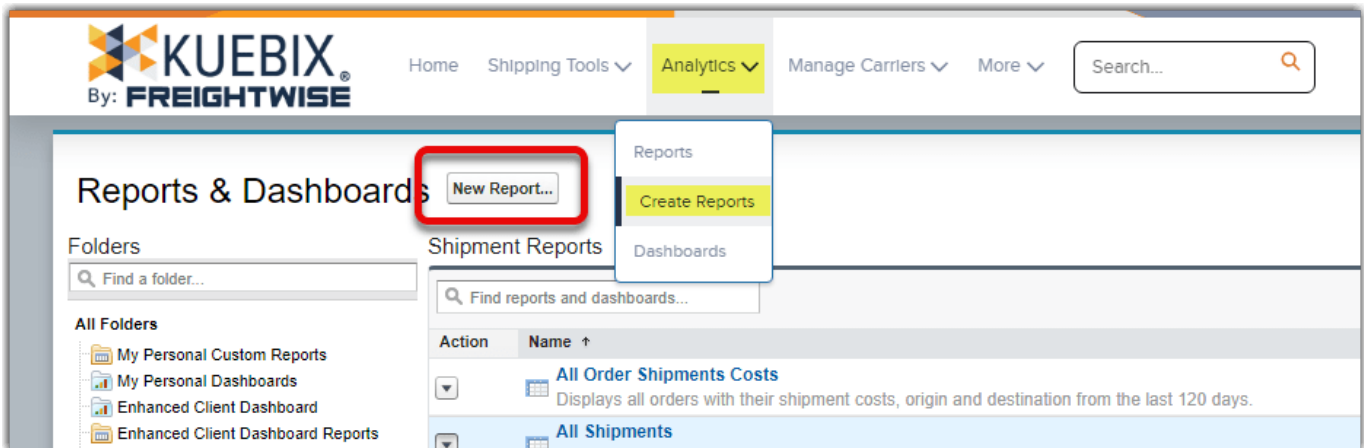
The screenshot shows the KUEBIX Analytics interface. At the top, there is a navigation bar with the KUEBIX logo (By: FREIGHTWISE) and menu items: Home, Shipping Tools, Analytics (highlighted), Manage Carriers, and More. Below the navigation bar, the page title is "Reports" and "All Reports" with a sub-header "114 items". A dropdown menu is open under the "Analytics" menu, showing "Reports" (highlighted), "Create Reports", and "Dashboards". The main content area is a table of reports:

REPORTS	Report Name	
Recent	<a href="#">2.0 Booked vs. Lowest Rate by User</a>	This report compares the booked rate to the lowest rate and displays the variance
Created by Me	<a href="#">2.0 Shipment Status v2</a>	
Private Reports	<a href="#">2.0 Shipment Status-Should be Delivered</a>	
<b>All Reports</b>	<a href="#">2.0 Shipments Booked</a>	Shipments Booked by Origin Location by Week
FOLDERS	<a href="#">2.0 Shipments by Carrier</a>	
All Folders		

If you want to adjust or customize an existing report, you can select the **Create Reports** option, navigate to the report you'd like to adjust, then click on the **upside down triangle** to reveal the options and select **Customize**.

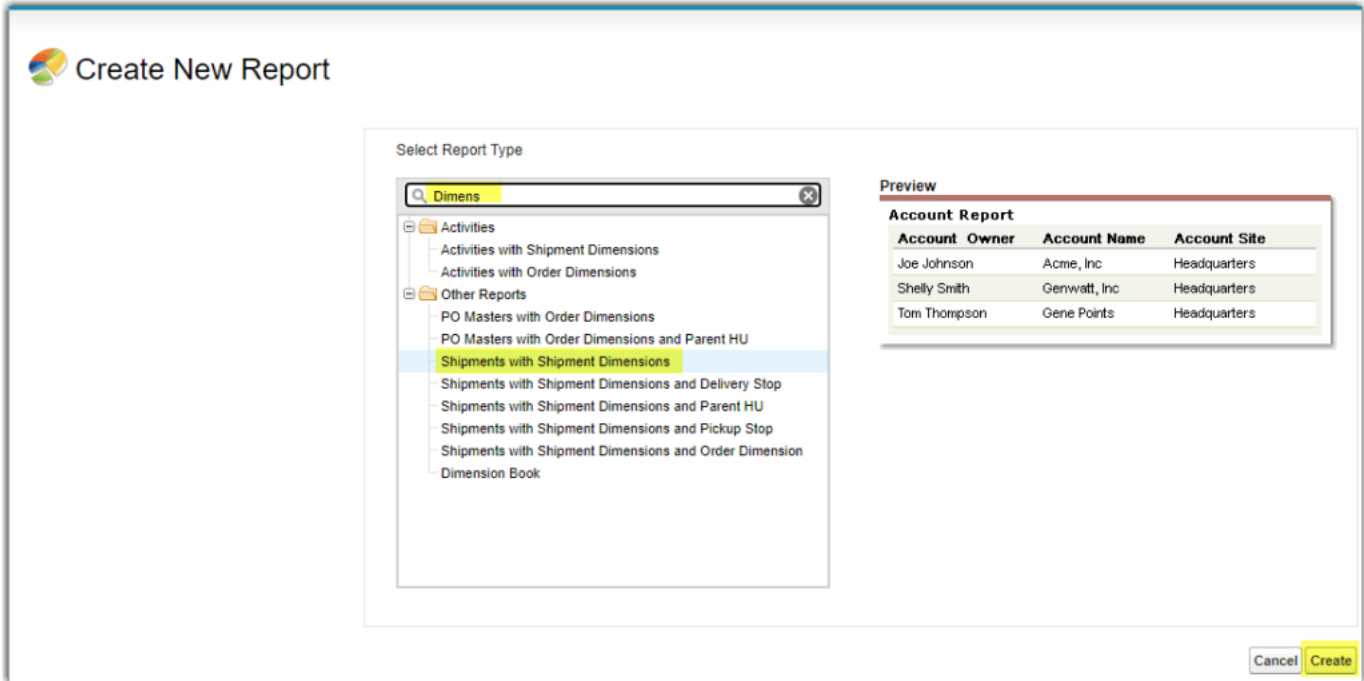


Or you can create your own report by hovering over **Analytics**, clicking on **Create Reports**, and then clicking on the **New Report...** button.



Different report types pull information from different records: as an example, the dimensions are stored on the Shipment Dimensions record, while the Class is stored on the Shipment Line Item record.

You can narrow down the results by typing in the search field.  
Select your desired report from the results and click **Create**.



**Create New Report**

Select Report Type

Search:

- Activities
  - Activities with Shipment Dimensions
  - Activities with Order Dimensions
- Other Reports
  - PO Masters with Order Dimensions
  - PO Masters with Order Dimensions and Parent HU
  - Shipments with Shipment Dimensions**
  - Shipments with Shipment Dimensions and Delivery Stop
  - Shipments with Shipment Dimensions and Parent HU
  - Shipments with Shipment Dimensions and Pickup Stop
  - Shipments with Shipment Dimensions and Order Dimension
  - Dimension Book

Preview

Account	Owner	Account Name	Account Site
Joe Johnson	Acme, Inc	Headquarters	Headquarters
Shelly Smith	Genwatt, Inc	Headquarters	Headquarters
Tom Thompson	Gene Points	Headquarters	Headquarters

Cancel Create

The Report Type at the top of the page shows the name of the report you've selected. The folders in the **Fields** area on the left show the information available for any associated records that can be added to the selected report type.

Report Type: **Shipments with Shipment Dimensions**  
**Unsaved Report**

Save Save As Close Report Properties Add Report Type **Run Report**

**Fields** All # # #

Search: Len

Drag and drop to add fields to the report.

- Shipment: Info
  - # Carrier PRO Number Base Length
  - # Flatbed Dimensions Length
  - # Pro Number Length
- Shipment Dimensions: Info
  - # Length
  - # Length Unit

**Filters** Add

Show: My shipments


Date Field: Accessorial Carrier P Range: All Time

To add filters, click Add.

**Preview** Tabular Format Show Remove All Columns

Shipment: BOL Number	Shipment Dimensions: Shipment Dimensions
KBX-12029238-22	SDN-25033397
KBX-12029238-22	SDN-25033398
KBX-13167083-22	SDN-27774557

To add fields to your report, either double click on the name in the left fields list, or click and drag the name to the desired location.



[Home](#)
[Shipping Tools](#)
[Analytics](#)
[Manage Carriers](#)
[More](#)

Search...

Report Type: Shipments with Shipment Dimensions  
**Unsaved Report**

Save Save As Close

Report Properties Add Report Type **Run Report**

**Fields** All #

Len

Drag and drop to add fields to the report.

- Shipment: Info
  - # Carrier PRO Number Base Length
  - # Flatbed Dimensions Length
  - # Pro Number Length
- Shipment Dimensions: Info
  - # Length
  - Length Unit

**Filters** Add

Show My shipments

Date Field Accessorial Carrier P Range All Time From To

To add filters, click Add.

Preview Tabular Format Show Remove All Columns

Shipment: BOL Number	Shipment Dimensions: Shipment Dimensions Number	Length
KBX-15294738-23	SDN-32855710	72
KBX-15294738-23	SDN-32855711	-
KBX-15752840-23	SDN-33961597	48
KBX-15752840-23	SDN-33961598	-
KBX-16824398-23	SDN-36502177	-
KBX-16824398-23	SDN-36502178	-
<b>Grand Totals (6 records)</b>		

This preview shows a limited number of records. Run the report to see all results.

If a field has already been added to the report, it will not allow you to add it again, indicated by the red icon.

Report Type: Shipments with Shipment Dimensions  
**Unsaved Report**

Save Save As Close Report Properties Add Report Type **Run Report**

**Fields** All # # # #

Search: Len

Drag and drop to add fields to the report.

- Shipment: Info
  - # Carrier PRO Number Base Leng
  - # Flatbed Dimensions Length
  - # Pro Number Length
- Shipment Dimensions: Info
  - # Length
  - Length Unit

**Filters** Add

Show My shipments

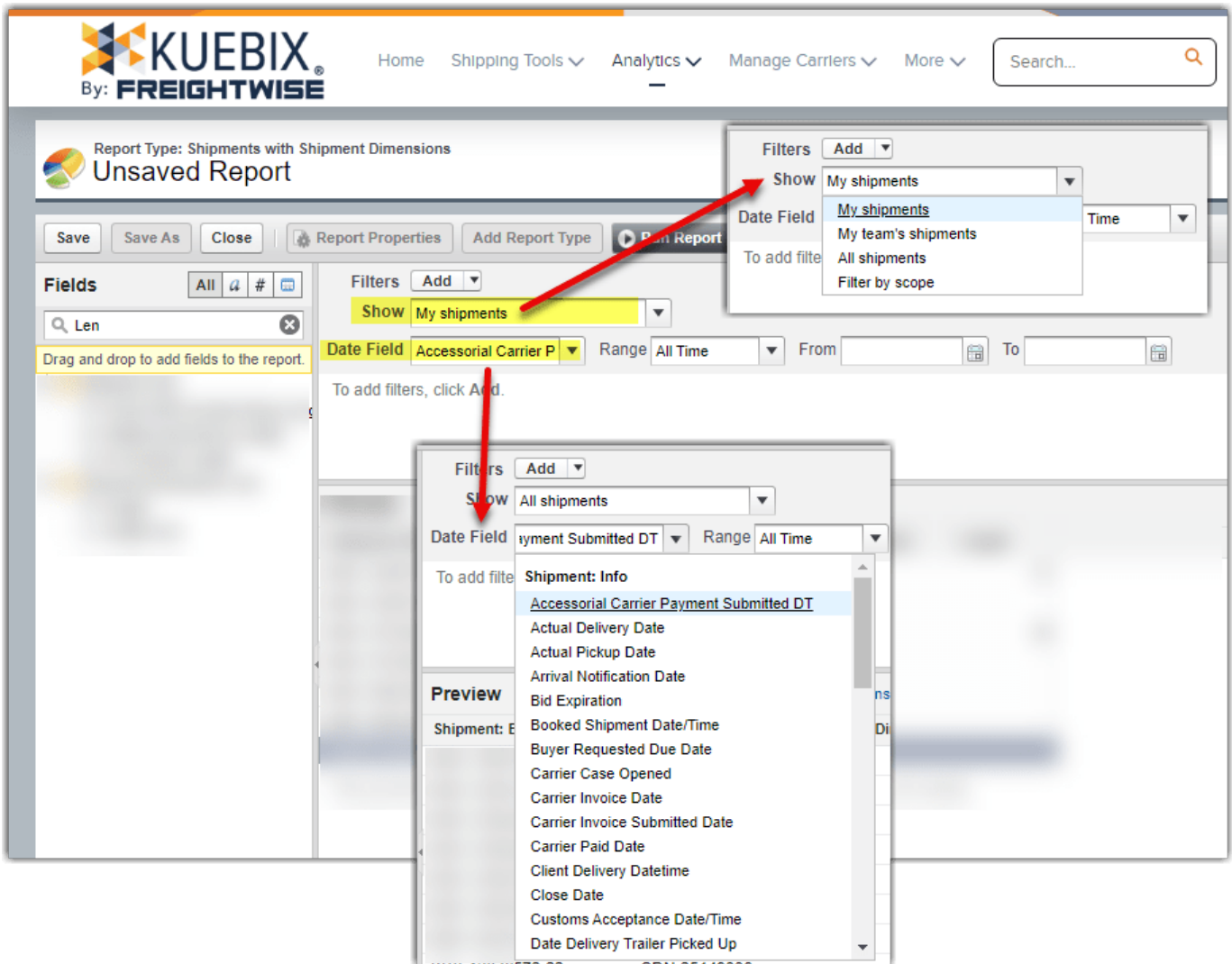
Date Field Accessorial Carrier P Range All Time From To

To add filters, click Add.

**Preview** Tabular Format Show Remove All Columns

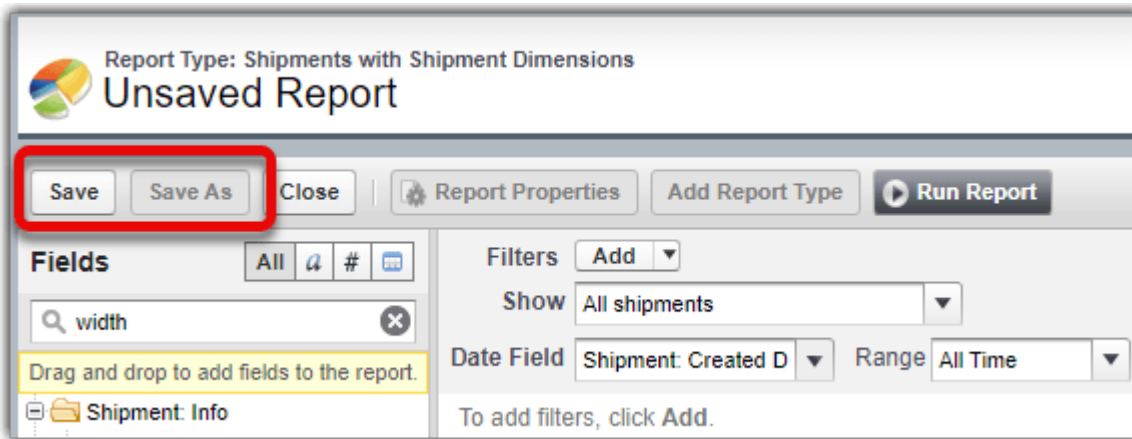
Shipment: BOL Number	Shipment Dimensions: Shipment Dimensions Number	Length
KBX-12029238-22	SDN-25033397	-
KBX-12029238-22	SDN-25033398	-
KBX-13167083-22	SDN-27774557	-
KBX-13167083-22	SDN-27774558	-
KBX-12208854-22	SDN-25470963	-
KBX-12208854-22	SDN-25470964	-
KBX-12285853-22	SDN-25657669	0
KBX-12285853-22	SDN-25657670	-

Please make sure to check the **Show** and **Date Fields**, as these will directly affect the report results.



The screenshot displays the KUEBIX web interface for configuring a report. At the top, the navigation bar includes 'Home', 'Shipping Tools', 'Analytics', 'Manage Carriers', and 'More', along with a search bar. The main header shows 'Report Type: Shipments with Shipment Dimensions' and 'Unsaved Report'. Below this, there are buttons for 'Save', 'Save As', and 'Close', along with 'Report Properties', 'Add Report Type', and 'Run Report'. The 'Fields' section on the left has a search bar and a list of fields. The 'Filters' section in the center has an 'Add' button and a 'Show' dropdown menu. A red arrow points from the 'Show' dropdown in the 'Filters' section to a larger, detailed dropdown menu. This menu lists various filter options, including 'My shipments', 'My team's shipments', 'All shipments', and 'Filter by scope'. Below this, there is a 'Date Field' dropdown set to 'Accessory Carrier P' and a 'Range' dropdown set to 'All Time'. A second red arrow points from the 'Date Field' dropdown to another detailed dropdown menu. This menu lists various date fields, including 'Shipment Submitted DT', 'Accessory Carrier Payment Submitted DT', 'Actual Delivery Date', 'Actual Pickup Date', 'Arrival Notification Date', 'Bid Expiration', 'Booked Shipment Date/Time', 'Buyer Requested Due Date', 'Carrier Case Opened', 'Carrier Invoice Date', 'Carrier Invoice Submitted Date', 'Carrier Paid Date', 'Client Delivery Datetime', 'Close Date', 'Customs Acceptance Date/Time', and 'Date Delivery Trailer Picked Up'. A 'Preview' section is also visible at the bottom of this menu.

Once you have adjusted the report to your liking, you can **Save** it (if it's an entirely new report) or click **Save As** (if you're customizing an existing report).



To see all results in your report, click the **Run Report** button. Depending on the amount of data you've requested, it may take a minute or two to display the results.

The report can now be exported as either a csv or an xls document, using the **Export Details** button.



### Shipments with Shipment Dimensions Report

Report Generation Status: Complete

Report Options:

Summarize information by:  Show

Time Frame:

Shipment: BOL Number	Shipment Dimensions: Shipment Dimensions Number	Length	Height	Width
<a href="#">KBX-12029238-22</a>	<a href="#">SDN-25033397</a>	-	-	-
<a href="#">KBX-12029238-22</a>	<a href="#">SDN-25033398</a>	-	-	-
<a href="#">KBX-13167083-22</a>	<a href="#">SDN-27774557</a>	-	-	-
<a href="#">KBX-13167083-22</a>	<a href="#">SDN-27774558</a>	-	-	-
<a href="#">KBX-12208854-22</a>	<a href="#">SDN-25470963</a>	-	-	-
<a href="#">KBX-12208854-22</a>	<a href="#">SDN-25470964</a>	-	-	-
<a href="#">KBX-12285853-22</a>	<a href="#">SDN-25657669</a>	0	0	0

If you need a report that will most likely result in more than 1k results, we recommend dividing the report into increments - e.g. January through March, April through June, etc. and then compiling the reports in a spreadsheet on your computer.