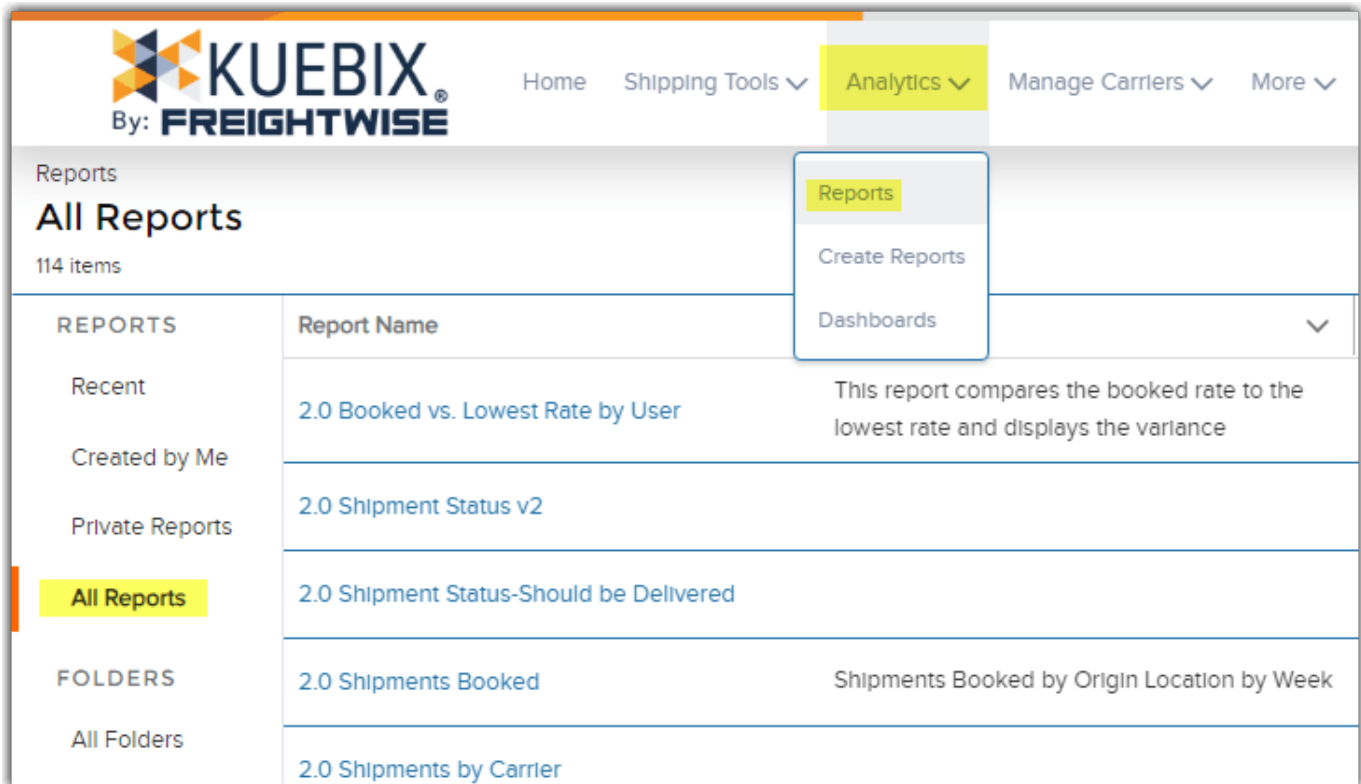


Creating and Customizing Reports

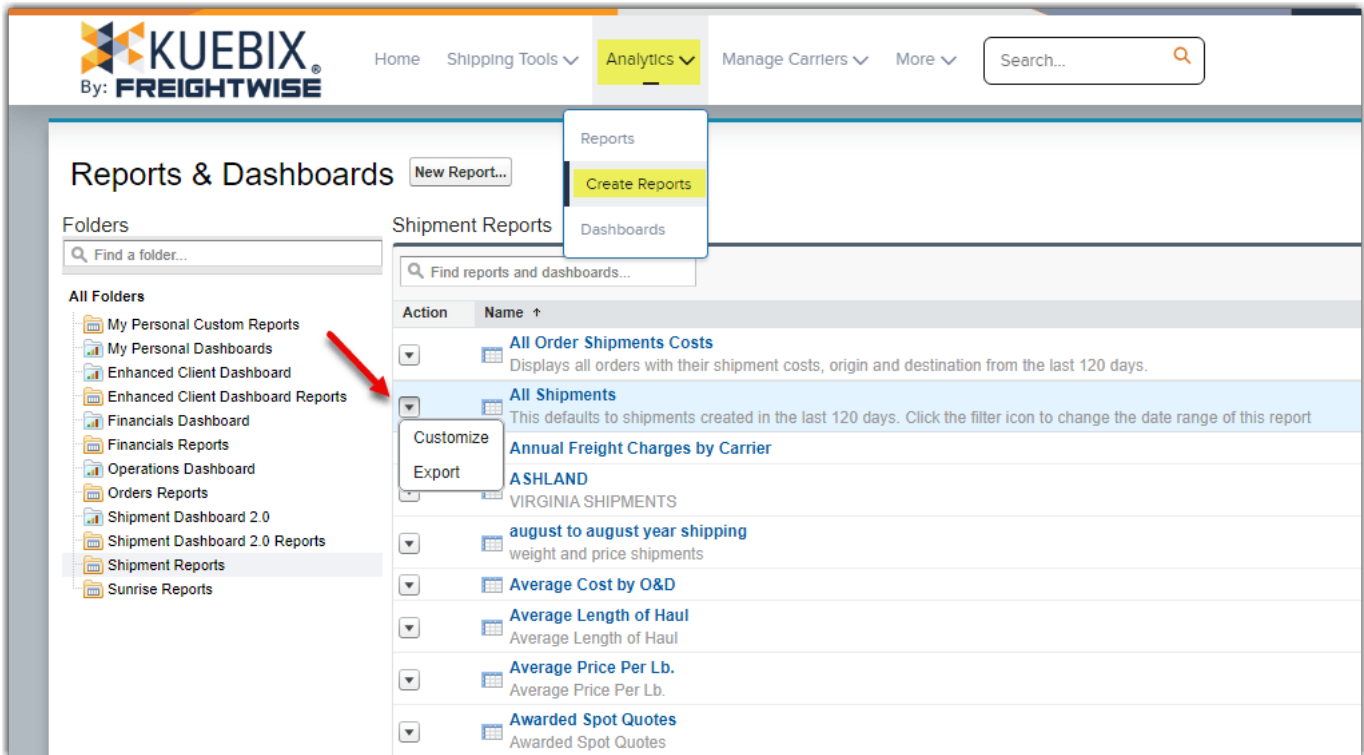
There are a number of premade reports available, accessed by clicking on the **Analytics** menu at the top of your screen.



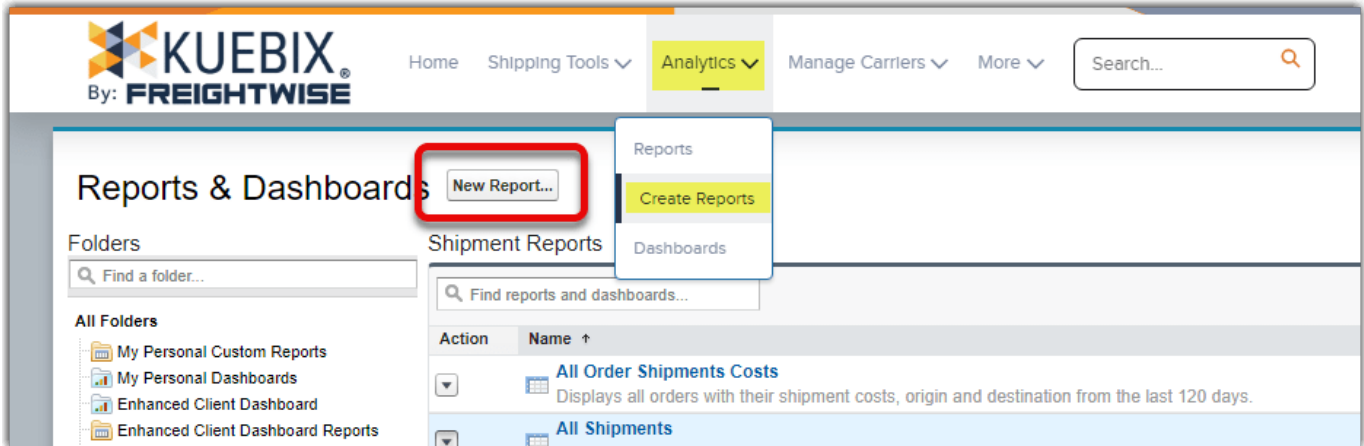
The screenshot shows the KUEBIX interface. At the top, there is a navigation bar with the KUEBIX logo (By: FREIGHTWISE) and menu items: Home, Shipping Tools, Analytics, Manage Carriers, and More. The 'Analytics' menu is highlighted, and a dropdown menu is open, showing 'Reports', 'Create Reports', and 'Dashboards'. Below the navigation bar, the 'Reports' section is titled 'All Reports' with 114 items. A table lists various reports, including '2.0 Booked vs. Lowest Rate by User', '2.0 Shipment Status v2', '2.0 Shipment Status-Should be Delivered', '2.0 Shipments Booked', and '2.0 Shipments by Carrier'. The 'All Reports' filter is selected in the left sidebar.

REPORTS	Report Name	
Recent	2.0 Booked vs. Lowest Rate by User	This report compares the booked rate to the lowest rate and displays the variance
Created by Me	2.0 Shipment Status v2	
Private Reports	2.0 Shipment Status-Should be Delivered	
All Reports	2.0 Shipments Booked	Shipments Booked by Origin Location by Week
FOLDERS	2.0 Shipments by Carrier	
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**.



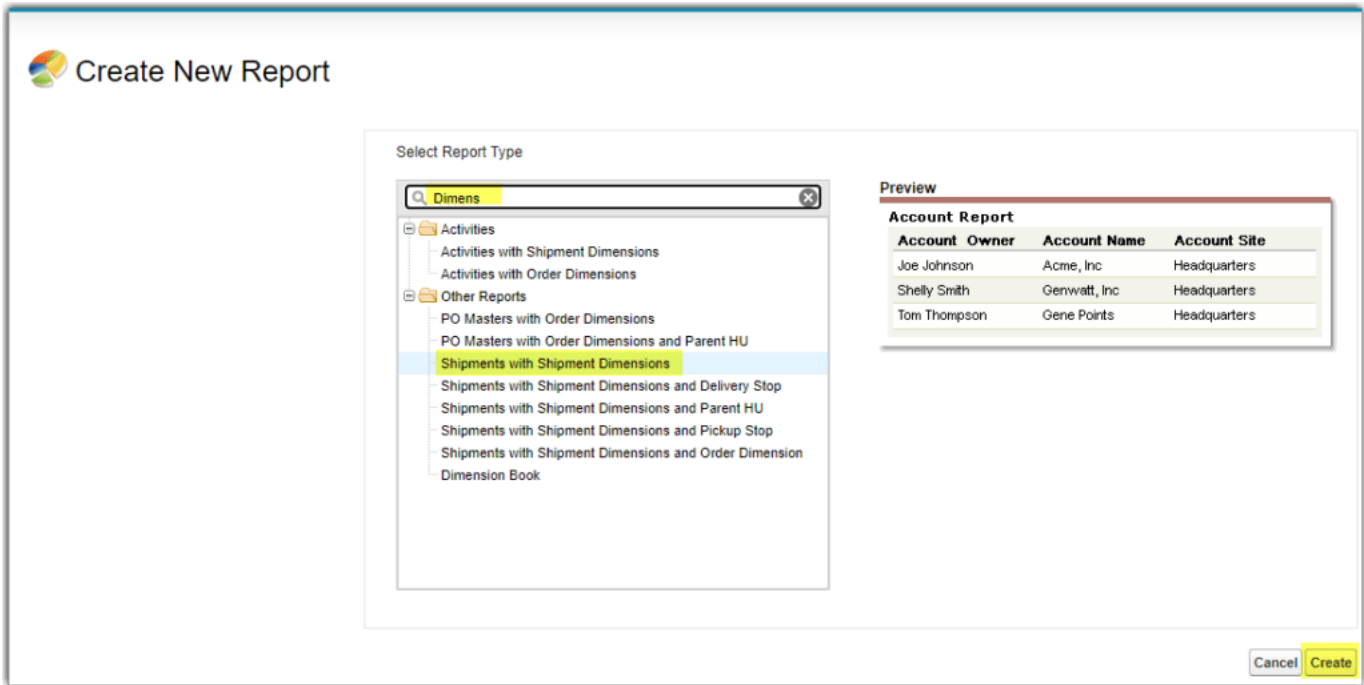
Or you can create your own report by hovering over **Analytics**, clicking on **Create Reports**, and then clicking on the **New Report...** button.



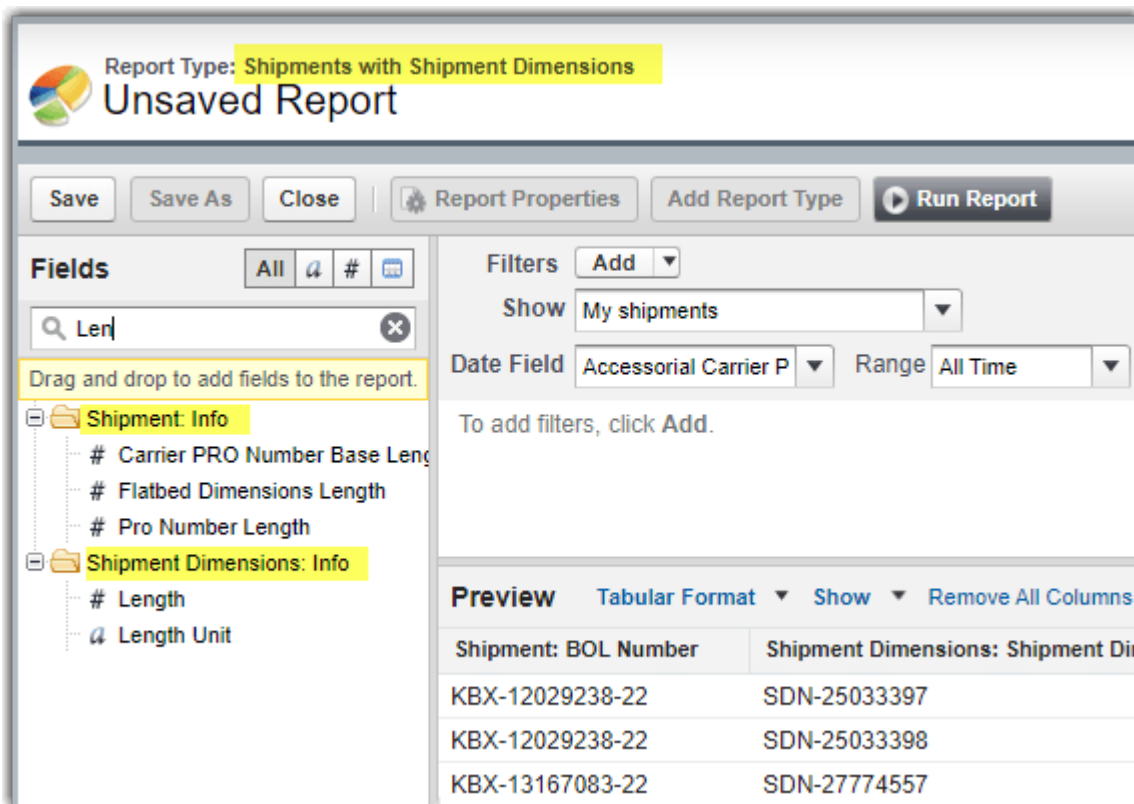
Different report types pull information from different records: as an example, the dimensions are stored on the Shipment Dimensions record, while the Class is stored on the Shipment Line Item record.

You can narrow down the results by typing in the search field.

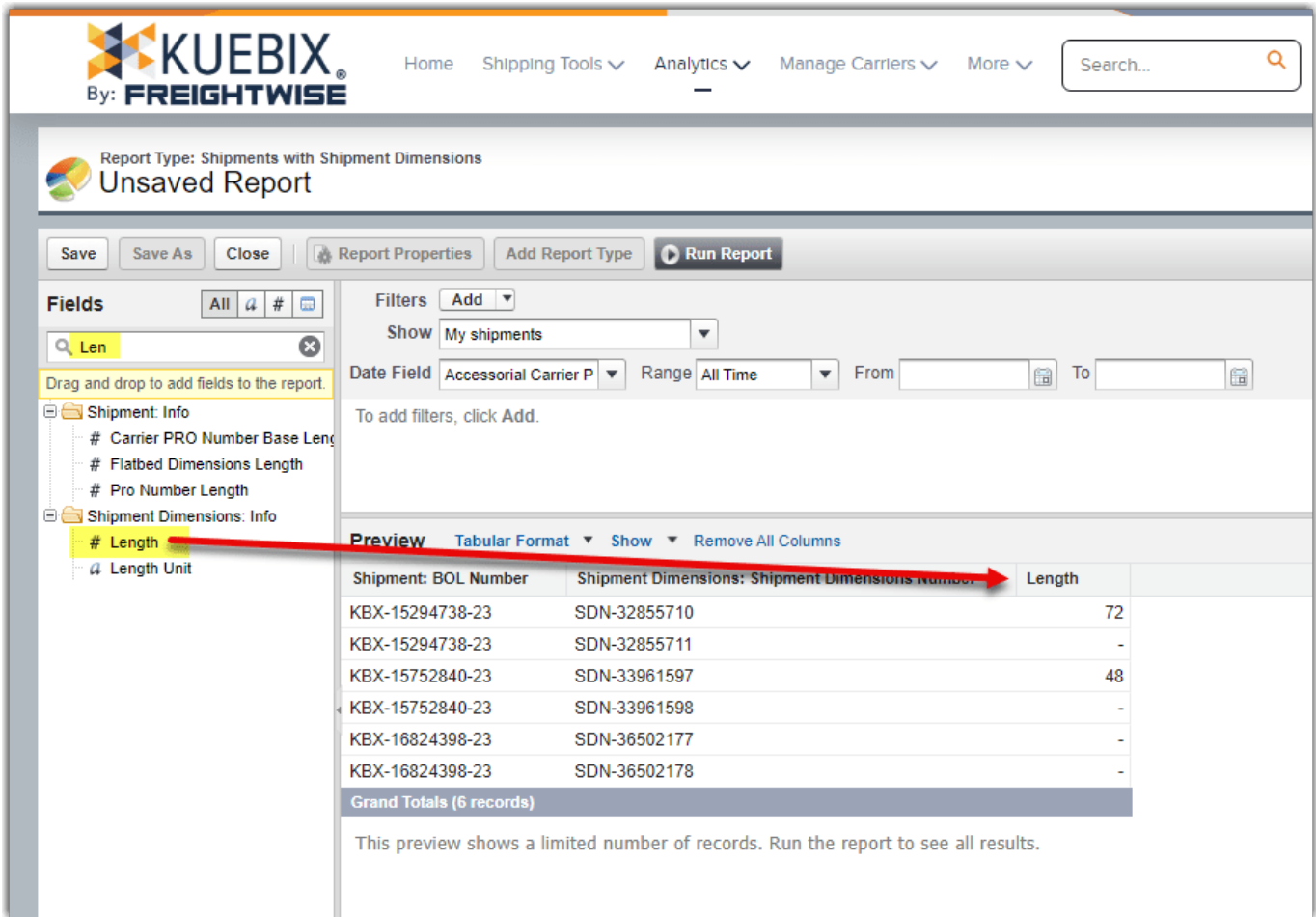
Select your desired report from the results and click **Create**.



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.



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.



Report Type: Shipments with Shipment Dimensions
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields: Len

Filters: Add Show: My shipments Date Field: Accessorial Carrier P Range: All Time From: To:

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

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	-
Grand Totals (6 records)		

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

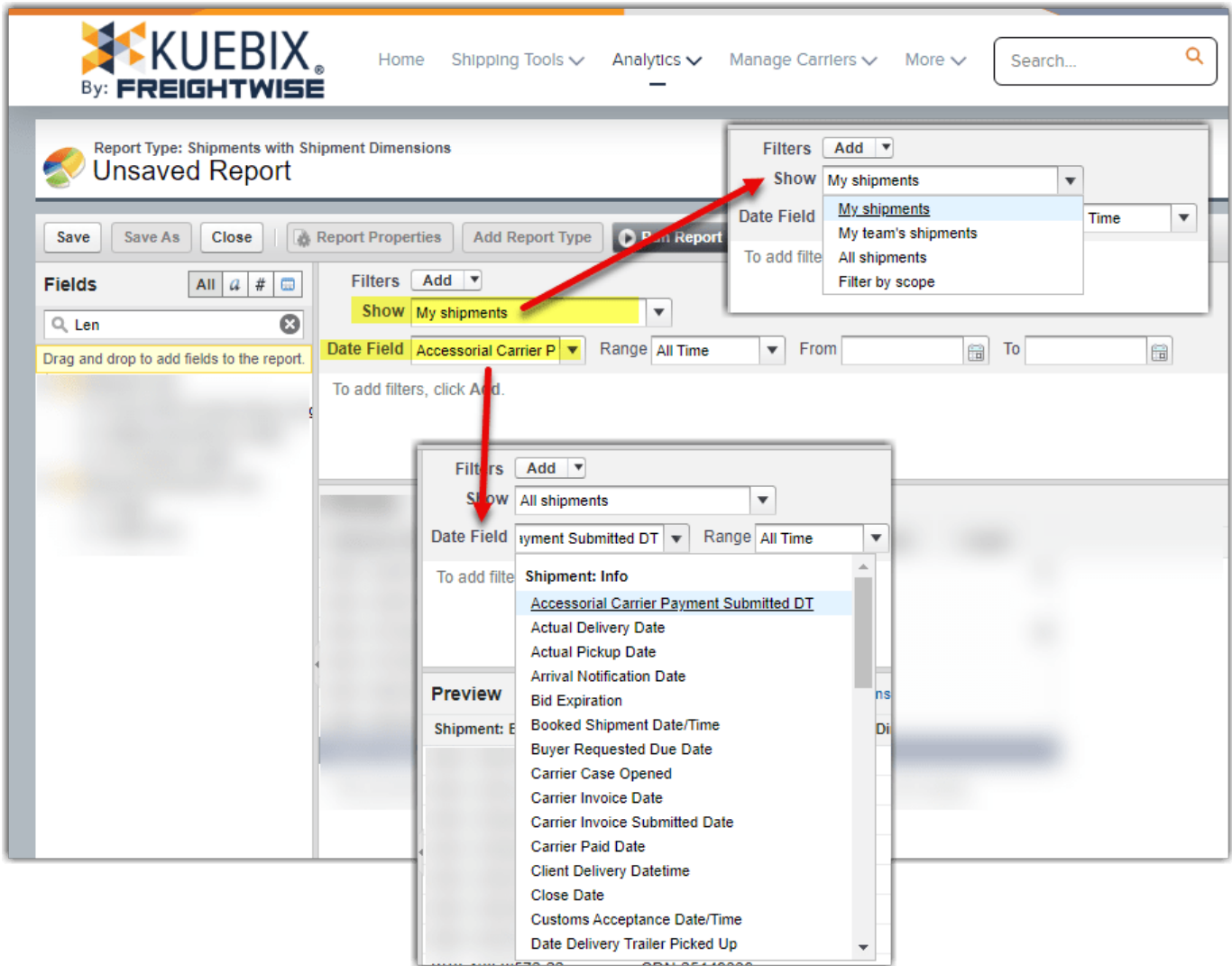
To add filters, click Add.

Preview Tabular Format Show Remove All Columns

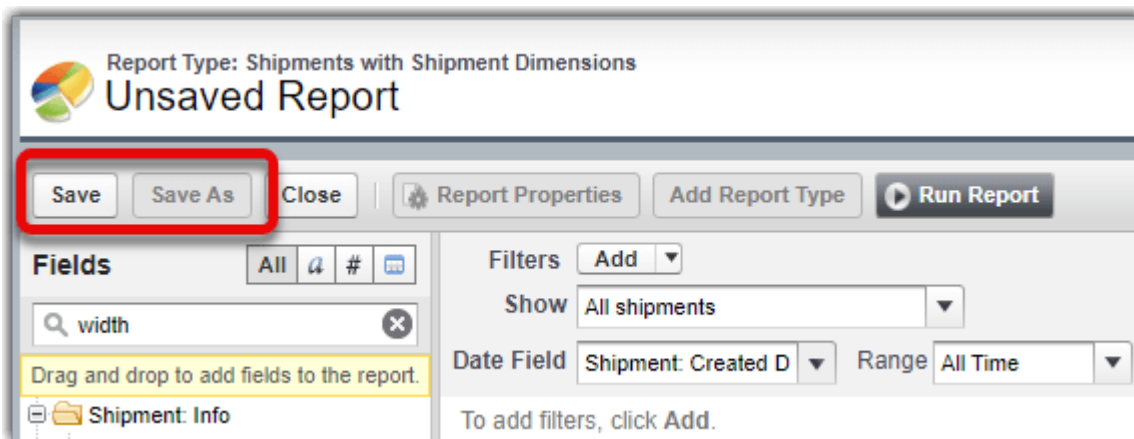
Shipment: BOL Number	Shipment Dimensions: Shipment Dimensions Number	Length
KBX-12029238-22	SDN-25033397	-
KBX-12029238-22	SDN-25033398	-
KBX-13167083-22	SDN-27774557	-
KBX-13167083-22	SDN-27774558	-
KBX-12208854-22	SDN-25470963	-
KBX-12208854-22	SDN-25470964	-
KBX-12285853-22	SDN-25657669	0
KBX-12285853-22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

Length

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



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: --None-- Show: All shipments Time Frame: Date Field: Shipment: Created Date

Run Report Hide Details Customize Save As Printable View **Export Details**

Shipment: BOL Number	Shipment Dimensions: Shipment Dimensions Number	Length	Height	Width
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	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.