# PayLOGIK Dashboard

## Dashboard Overview

The purpose of this document is to give you a detailed description of the various unique panels and settings available on the PayLOGIK Dashboard.

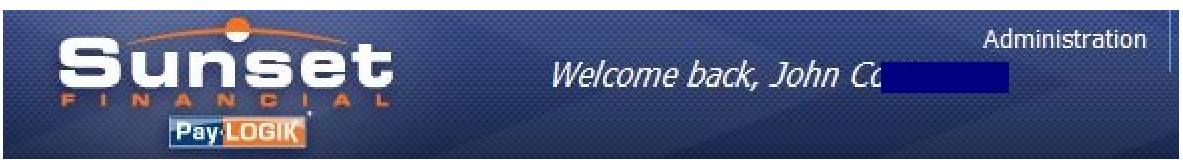
## Real-time Versus Historical Data

Dashboard panels display either real-time statistics or historical (PAID) statistics depending on the panel's purpose. As of this writing, panels that show table data are displaying real-time data and panels that show pie charts are displaying historical data. The timeframe for historical data may be controlled by selecting different radio buttons on the dashboard. The radio buttons are located at the top of the dashboard form.

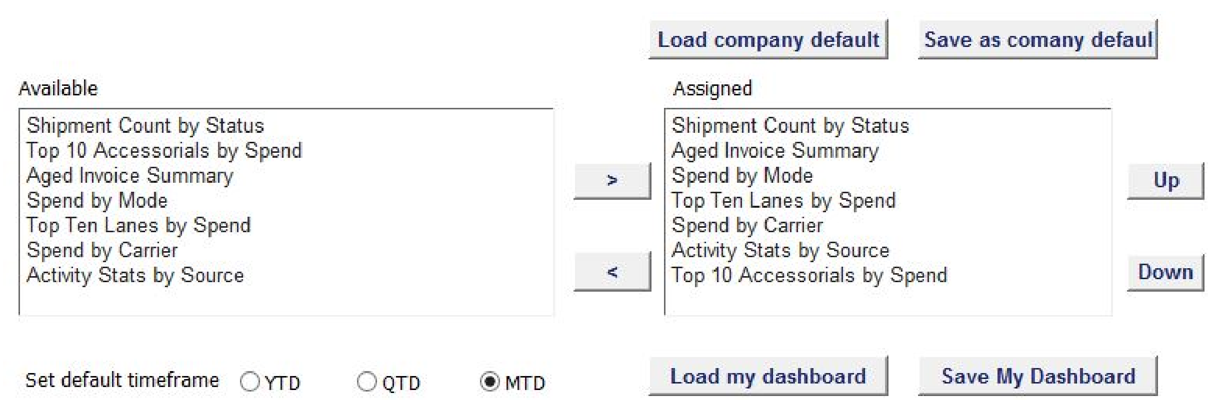

The text box to the right of the buttons displays the starting date for the historical data. The ending date is always the previous night.

## Administering Your Dashboard

Users with dashboard administration authority may change their own dashboard layout and with additional authority they may establish the company default dashboard layout. If authorized, the Administration tab will be displayed at the top of the PayLOGIK Dashboard screen.




Clicking the Administration tab will open the Dashboard Administration form.




The left box displays all the available dashboard panels and the right box displays the panels you have selected in the order that they will appear on your dashboard. The left and right arrow buttons are used to add or remove panels from your assigned (selected) list. To add a panel, click on it in the left hand box and then click on the right-pointing button. More than one item may be selected at a time by holding down the Ctrl (Control) key while selecting. Similarly, selecting one or more items in the right hand (Assigned) box and clicking the left-pointing arrow will remove the panel(s) from your selected list.

Panels may be arranged in your Assigned box by using the Up and Down buttons. Once you have your assigned list the way you like it, click the Save My Dashboard button. The next time you open or refresh the dashboard page, the changes will take effect.

If you have made changes to your dashboard and wish to restore the original (last saved) list, click the Load My Dashboard button.

Users with additional Company-Level authority may also set the default panel list for their company's users by clicking the Save as Company Default button. Clicking the Load Company Default will display the currently saved company default dashboard list in the right hand box. Setting a company default affects only users who have not defined a personal layout. In some companies, users may not define personal dashboards, and the company default will be used.

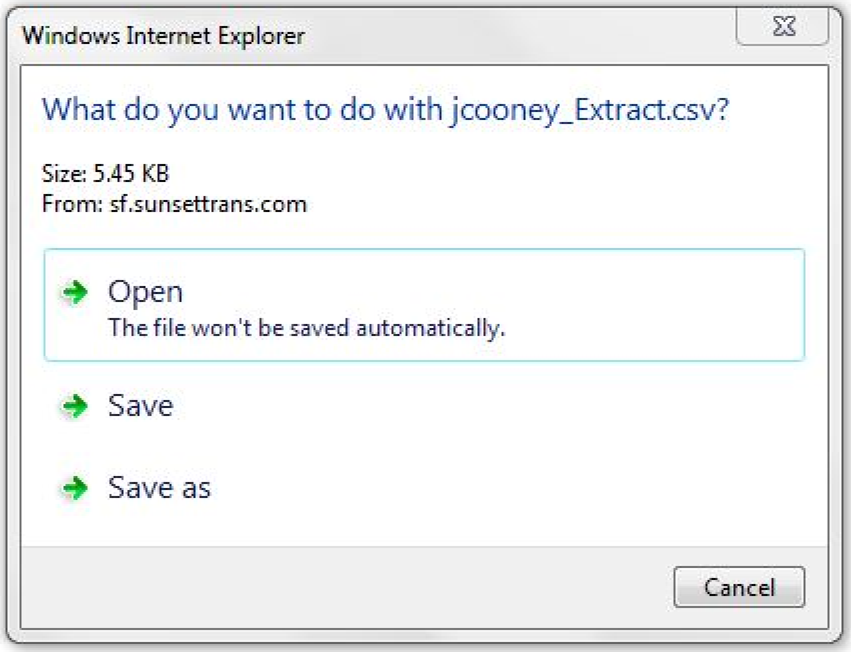
## Exporting Table Data

Any time a data table is displayed there will be an Export button available. Clicking the Export button will generate a .csv file and make it available for downloading. A Download hyperlink will appear beside the Export button when the file is ready.

| | | | | | |
|---|---|---|---|---|---|
| 550JP-945CA | 16,631.35 | 43 | 9,196 | 1.81 | 214 |
| 633MO-759TX | 16,419.54 | 9 | 367,607 | 0.04 | 40845 |
| 675KS-727AR | 16,335.32 | 15 | 3,561 | 4.59 | 237 |
| 675KS-571SD | 16,334.01 | 19 | 494 | 33.06 | 26 |
| 623IL-087NJ | 16,024.57 | 4 | 154,560 | 0.10 | 38640 |
| 628IL-217MD | 15,991.84 | 10 | 100,500 | 0.16 | 10050 |
| **TOTAL** | **3,211,913.49** | **2,472** | | | |

Export Download

Clicking the Download hyperlink will open a dialog box that will allow you to open or save the file on your local computer. The appearance of the dialog box will vary depending on the version of Windows that you are running. This is how it looks on a Windows 7 system. Extract files are temporary files on the server and are overwritten each time an export is done. You must save the file on your local computer if you want to keep them.

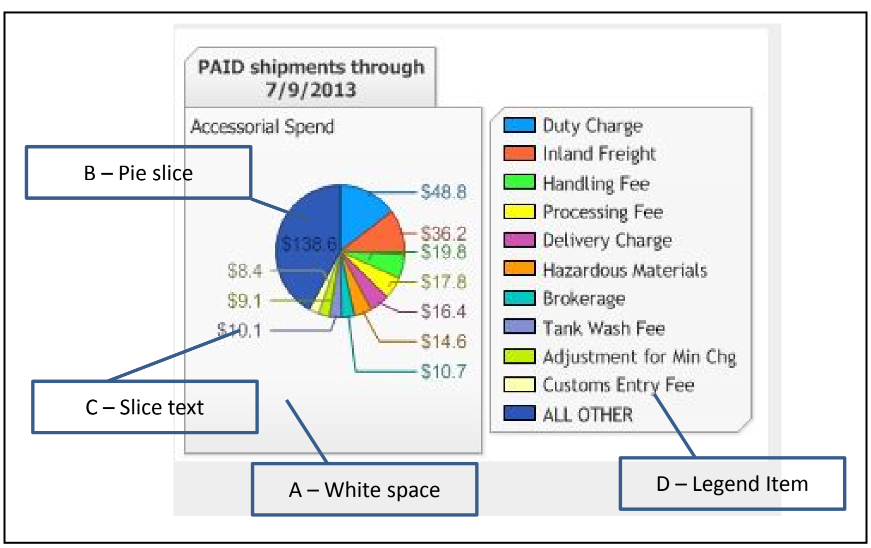



## Panel Definitions and Available Sub-Panels (drill-down)

### Overview

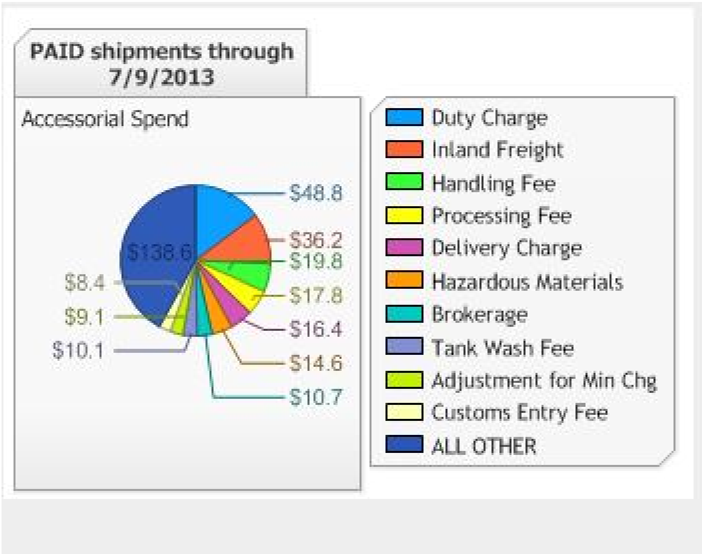
Each graphical panel supports at least one level of drill-down by clicking on various areas of the graph. The areas of the panel that may have drill-down pages are:

A. The white space around the pie chart
B. Within a pie slice
C. The text associated with a pie slice
D. An item within the legend



Clicking on the white space of any chart will always open a full page for the chart with additional drill-down options as defined for each chart.  The results of clicking on other areas of a dashboard chart vary depending on the panel and are documented under the chart's heading.

## Accessorial Spend




This chart displays individual slices for the top ten accessorial charges by spend for invoices PAID within the selected time period and an additional slice for the sum of all other accessorial charges.  Hovering over a slice will display a tool tip box showing the charge description and the number of shipments that include that accessorial.

### *Drill-down options:*

Clicking either on the white space or on the legend will display an expanded chart page with a table detailing the total spend and count of the times used for each of the top ten accessorials and one line for all other accessorial charges.

## Aged Invoice Summary

Aged Invoice Summary

| | | | |
|---|---|---|---|
| 07/10/2013 | 4746 | 8012 | $1,404,030.24 |
| 07/17/2013 | 672 | 672 | $277,834.15 |
| 07/24/2013 | 632 | 632 | $259,863.78 |
| 07/31/2013 | 276 | 276 | $82,991.77 |
| 08/07/2013 | 33 | 33 | $12,104.39 |
| Unassigned | 227 | 227 | $74,134.15 |

For customers using the PayLOGIK Invoice Aging process, this table shows the total invoice count, total shipment count and total dollar amount expected to be in future funds requests by funds request date.

The row titled Unassigned represents the invoices that have been entered today and have not had their projected funds request date calculated yet.  Funds request dates are recalculated each night.

### *Drill-down options*

Clicking on any projected funds request date will display a table showing the number of invoices, shipments and total dollars broken down by billing location.  Customers with only a single billing location will see a table with only one row in it.

Aged Invoices by location for 08/07/2013

| Location | Invoices | Shipments | Due |
|---|---|---|---|
| 0002 KSA | 1 | 1 | $105.68 |
| 0006 DTA | 2 | 2 | $426.55 |
| 0009 KWA | 1 | 1 | $669.22 |
| 0011 MMA | 1 | 1 | $261.66 |
| 0014 MLA | 3 | 3 | $2,890.25 |
| 0015 DHA | 1 | 1 | $84.87 |
| 0016 DDA | 3 | 3 | $681.21 |
| 0019 DSA | 1 | 1 | $448.15 |
| 0029 EMA | 1 | 1 | $157.90 |
| 0030 EWA | 1 | 1 | $401.98 |
| 0033 ABA | 1 | 1 | $72.52 |
| 0035 ADA | 1 | 1 | $109.94 |

## Shipment Count by Status

Shipment Count by Status

| Status | Count | Dollars |
|---|---|---|
| AUDITFAIL | 91 | 46,281.29 |
| HANDAUDIT | 6 | 2,536.39 |
| CUSTREVIEW | 413 | 162,925.82 |
| AUDITOK | 9863 | 2,111,945.70 |
| BATCHRDY | 108 | 111,698.14 |
| FUNDSREQ | 7758 | 1,726,374.07 |
| INREVIEW | 49 | 61,062.32 |
| APPROVED | 4677 | 1,359,344.59 |
| FUNDED | 3 | 90.96 |

This table shows a summary of the UNPAID shipments in the system, grouped by current status.  The count column shows the total number of shipments and total current due dollars at each status.  The table is based on real time data, so the counts and dollar amounts may change during the day as invoices move through the process.

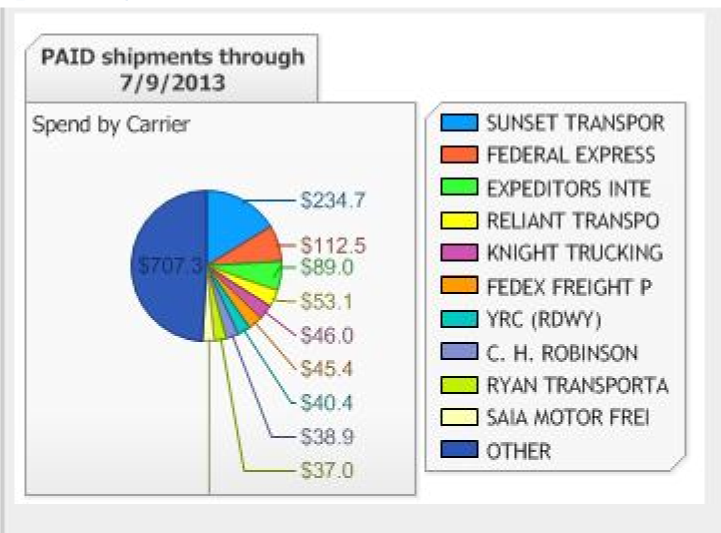
### *Drill-down options*

Clicking on an individual status will display a table showing the total number of shipments and total dollar amount by location. Customers with only one billing location will see a table with only one row.

AUDITFAIL Invoices by Location

| Location | Shipments | Due |
|---|---|---|
| 0000 HA[redacted] | 1 | 217.35 |
| 0001 KKA | 1 | 584.77 |
| 0005 KOA | 3 | 3,692.99 |
| 0010 KDA | 1 | 1,126.83 |
| 0014 MLA | 2 | 2,038.06 |
| 0015 DHA | 1 | 1,253.96 |
| 0016 DDA | 1 | 2,231.00 |
| 0019 DSA | 1 | 434.47 |
| 0025 PFA | 1 | 2,841.26 |
| 0074 ATA | 1 | 205.34 |

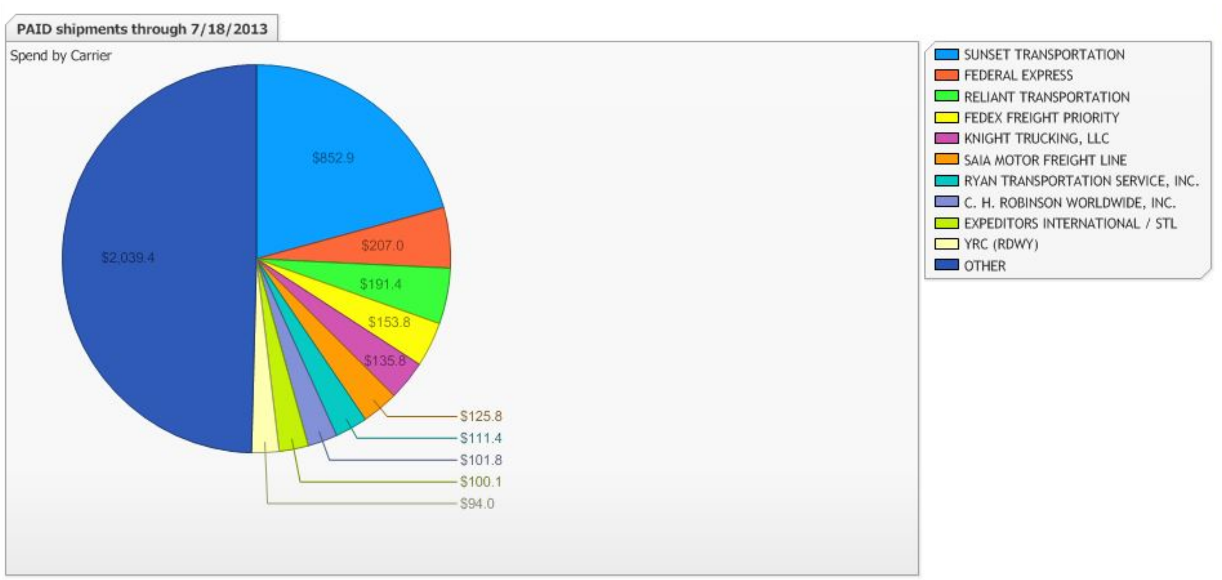
## Spend by Carrier




Each pie slice represents the total spend for the top ten carriers with an additional slice for the total spend for all other carriers.

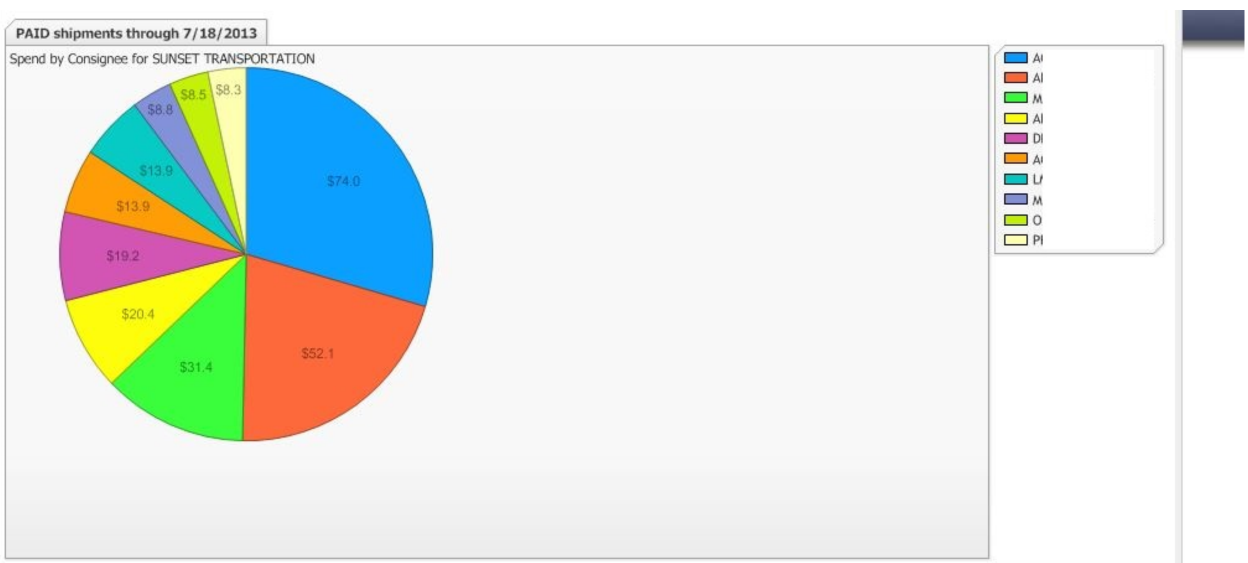
### *Drill-down options*

Clicking on the white space or the legend will display an enlarged version of the chart with a data table listing all carriers, not just the top ten.



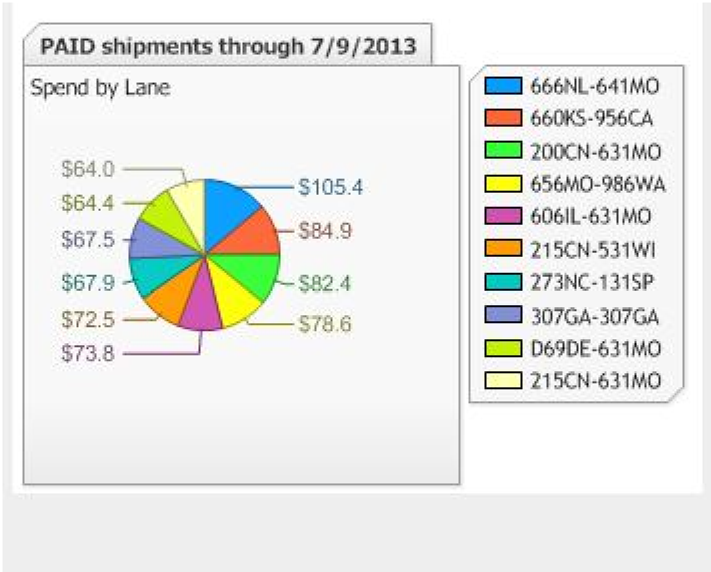

| Carrier | Spend | Shipments | Savings |
|---|---|---|---|
| SUNSET TRANSPORTATION | 852,926 | 3,297 | 130.20 |
| FEDERAL EXPRESS | 207,037 | 5,074 | 3,421.47 |
| RELIANT TRANSPORTATION | 191,430 | 240 | -15.45 |
| FEDEX FREIGHT PRIORITY | 153,769 | 766 | 371.90 |

Clicking on a pie slice or a legend entry on this chart will display the consignee detail for the selected carrier. There is not a table for the “other” slice.




| Consignee | Spend | Shipments | Savings$ |
|---|---|---|---|
| AC | 73,969 | 143 | .00 |
| AF | 52,098 | 71 | .00 |
| MA | 31,381 | 121 | .00 |
| AF | 20,413 | 6 | .00 |
| DE | 19,225 | 18 | .00 |

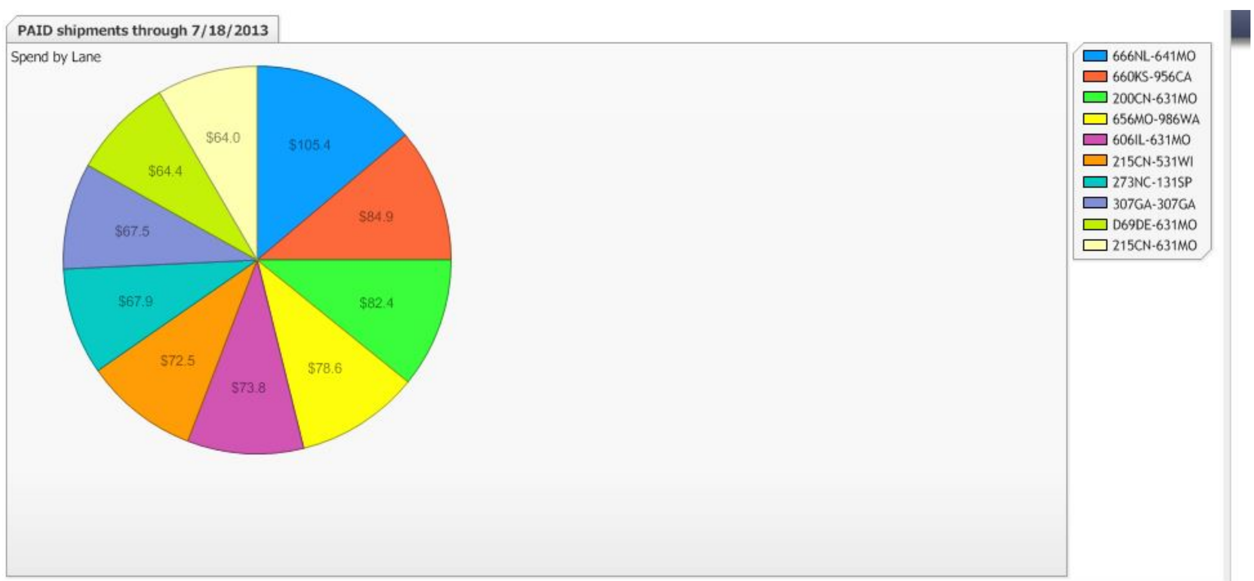
## Spend by Lane




This chart displays the top ten lanes used by spend. Lanes are defined as the three-digit postal code and state for the origin and the three-digit postal code and state for the destination.

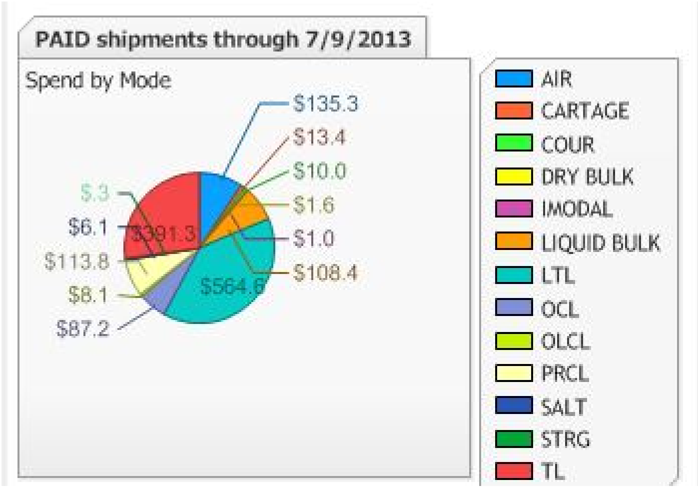
### *Drill-down options*

Clicking anywhere on this chart will display an expanded chart with the same pie chart, and includes the data table that supports the graph. The data table includes ALL lanes, not just the top ten.




| Lane | Spend | Shipments | Weight | Avg$/# | Avg#/ship |
|---|---|---|---|---|---|
| 666NL-641MO | 105,416.66 | 53 | 403,162 | 0.26 | 7607 |
| 660KS-956CA | 84,937.64 | 31 | 366,778 | 0.23 | 11832 |
| 200CN-631MO | 82,433.62 | 34 | 823,342 | 0.10 | 24216 |
| 656MO-986WA | 78,569.87 | 14 | 547,356 | 0.14 | 39097 |
| 606IL-631MO | 73,789.71 | 79 | 1,562,681 | 0.05 | 19781 |
| 215CN-531WI | 72,482.20 | 10 | 157,418 | 0.46 | 15742 |

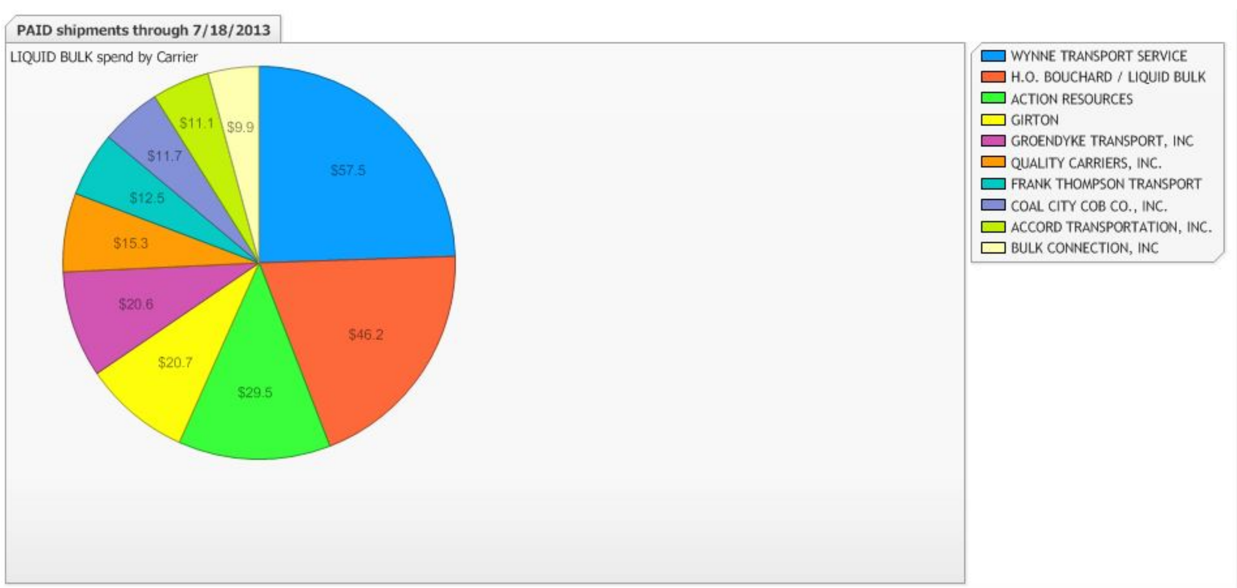
## Spend by Mode




Each slice in this chart represents the total spend for the selected mode for the selected time period. Hovering over any slice will display a tool tip box containing the total spend and the shipment count.

### *Drill-down options*

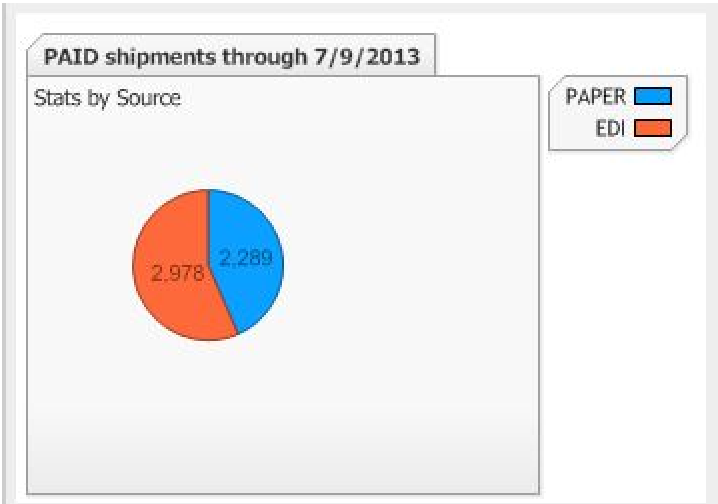
Clicking on an individual slice will open a new chart showing the carrier breakdown for that the selected mode.



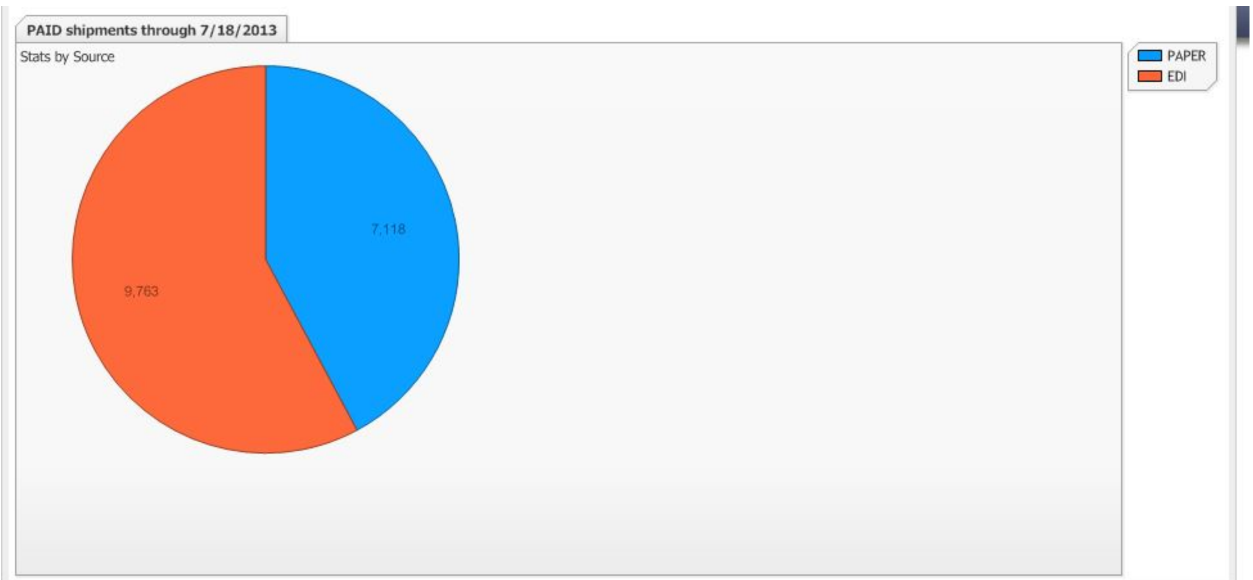

| Carrier | Weight | Spend | Shipments | Avg$ | AvgWgt | Savings |
|---|---|---|---|---|---|---|
| WYNNE TRANSPORT SERVICE | 688,200 | 57,471.99 | 17 | 300.07 | 38,615 | .00 |
| H.O. BOUCHARD / LIQUID BULK | 3,705,166 | 46,170.15 | 75 | 0.02 | 48,746 | .00 |

Clicking on the white space or any legend item will open an enlarged chart showing the spend-by-mode chart again, just larger. Clicking on an individual slice of the enlarged chart will display the detailed pie chart for the selected mode.

## Stats by Source




This chart shows the total number of shipments processed by source – either paper or EDI.  Clicking anywhere on the chart will display the source detail for each carrier.




| Carrier | Source | Spend | Shipments | Savings |
|---|---|---|---|---|
| 1ST CHOICE COURIER AND DISTRIBUTION, INC. | PAPER | 122.07 | 3 | .00 |
| 24/7 EXPRESS LOGISTICS, INC. | PAPER | 2,177.76 | 16 | .00 |
| 67 EXPRESS L.L.C. | PAPER | 256.39 | 5 | .00 |
| A & A TRUCKING | PAPER | 2,740.00 | 34 | .00 |

The table may have multiple rows for one carrier if we received both paper and EDI invoices from that carrier.

| | | | | |
|---|---|---|---|---|
| AAA COOPER TRANSPORTATION | EDI | 8,983.38 | 95 | .00 |
| AAA COOPER TRANSPORTATION | PAPER | 70.11 | 1 | .00 |
| ABF FREIGHT SYSTEM,INC. | EDI | 52,539.06 | 182 | .00 |
| ABF FREIGHT SYSTEM,INC. | PAPER | 3,935.98 | 2 | .00 |
| ACCORD TRANSPORTATION, INC. | PAPER | 11,099.50 | 3 | .00 |
| ACTION RESOURCES | EDI | 29,484.31 | 27 | .00 |