Analytics Out of the Box: Ready-to-Use Insights from Day 1

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JOSEPHINE 2





DISPATCH SCIENCE

Your presenter

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Helps customers, new and long-standing, get the most out of Dispatch Science.

Reports vs. views

A report

A single, self-contained unit

- Answers one question about one part of the software
- Read-only output with limited functionality
- Isolated: each report lives in its own part of the software

An analytics view

Brings data from several parts of the software together in one place

- Click through to the records behind it — accounts, orders, drivers — and into more detailed sub-views
- Take action from the view: flag orders ready for invoicing or settlement, print forms
- Everything gathered in one spot instead of spread across the software

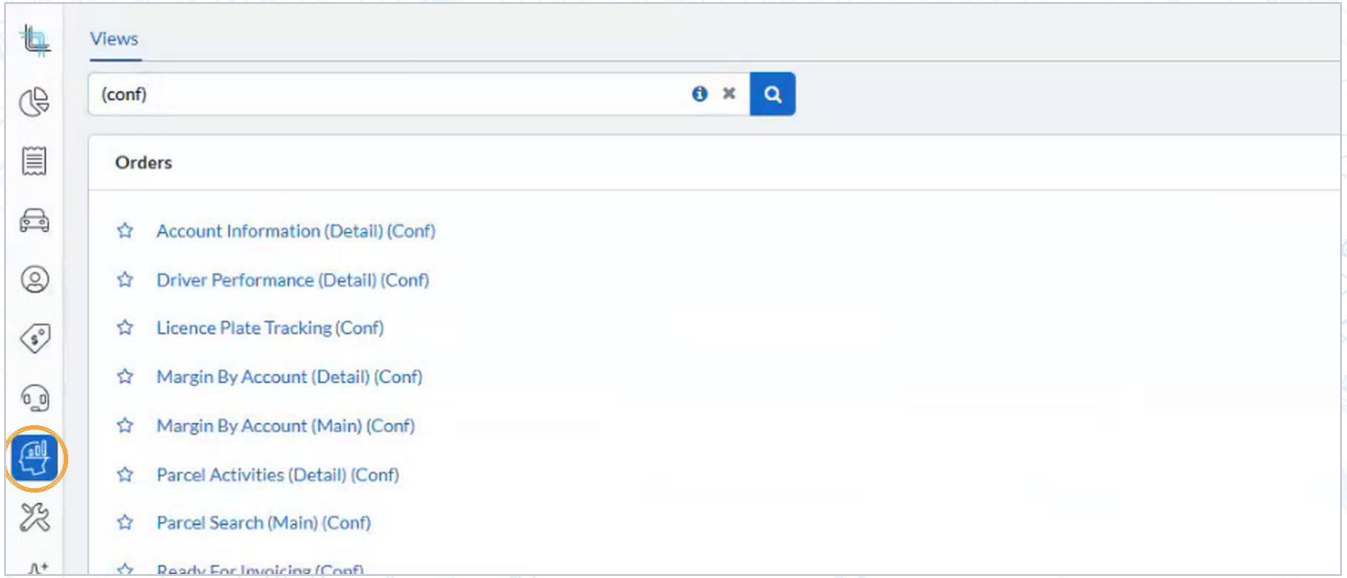
Where to find your views

1. Log in to Dispatch Science

2. Click the Analytics icon in the left-hand menu

3. Views are grouped into sections: Orders, Drivers, Accounts, Financials

4. Views can be restricted by user role, so only certain roles see certain views



The 10 default views

Orders — 3 views

Drivers — 3 views

Accounts — 1 view

Financials — 3 views

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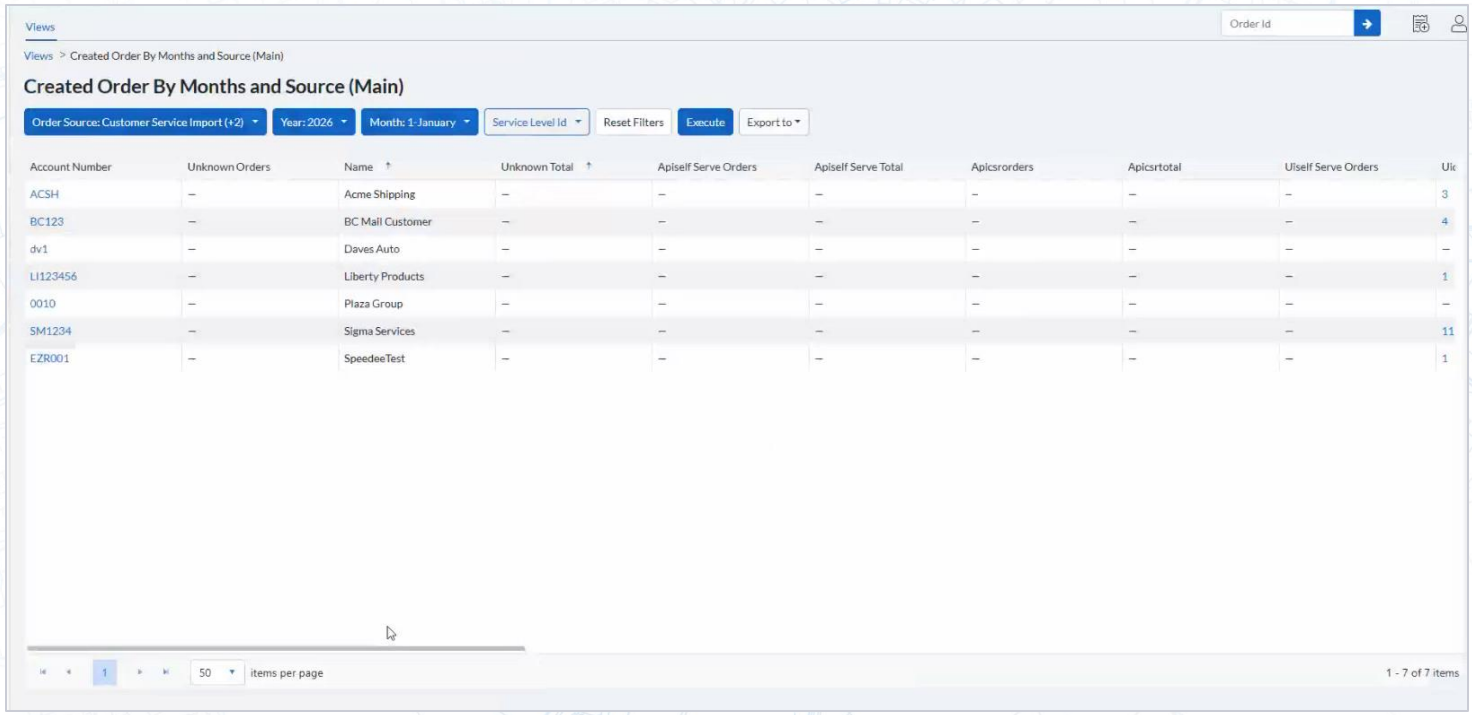
Orders

Created Order By Months and Source · Parcel Search · License Plate Tracking

Created Order By Months and Source

Where your business comes from: orders and revenue by account and by channel.



USE CASES

See which customers use the portal, API or imports

- Compare revenue by channel month to month

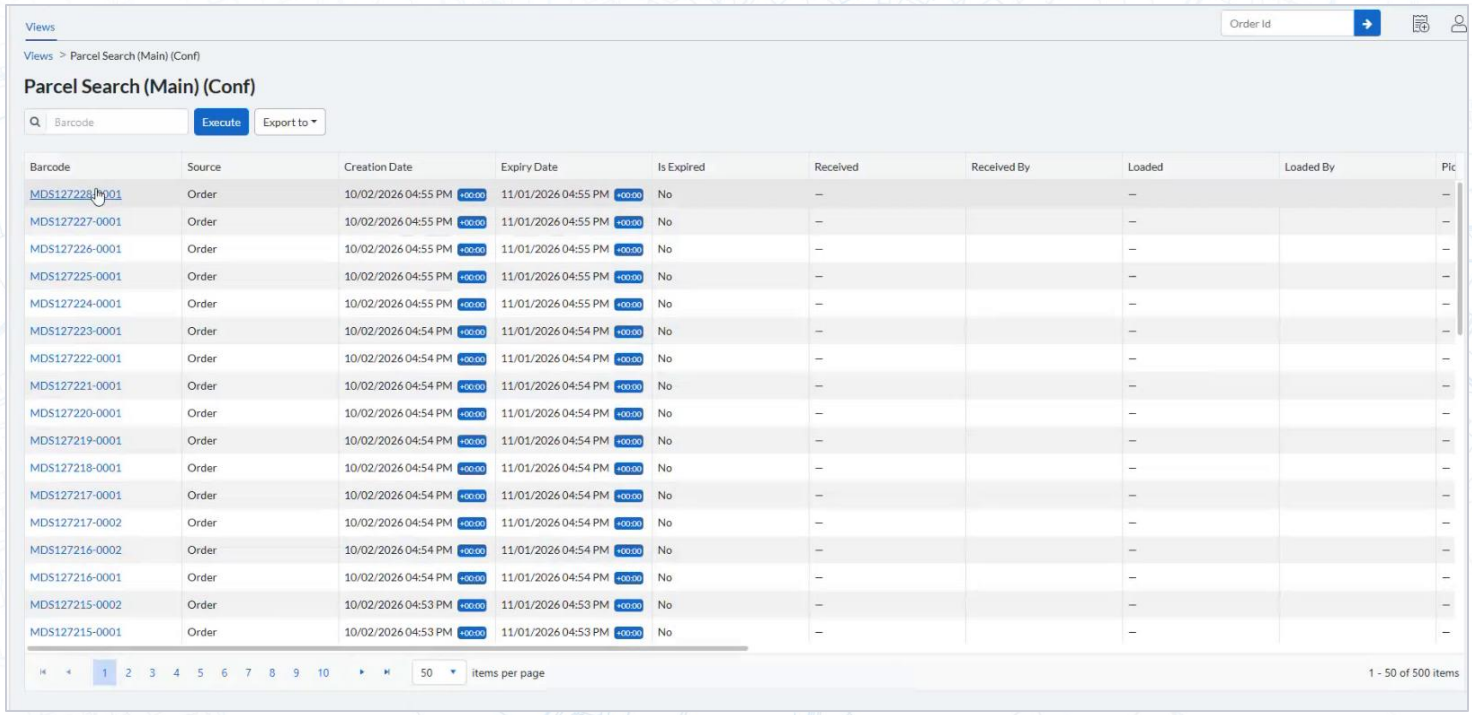
WHAT YOU GET

Filters: Order Source (multi-select), Year, Month, Service Level

- One row per account: order count and total $ for each channel, plus totals
- Click the account to open it; click any count to see those orders, then open any order

Parcel Search

Find any parcel and follow everything that happened to it.



USE CASES

Answer “where is my parcel?” calls fast

- Trace a parcel through the warehouse

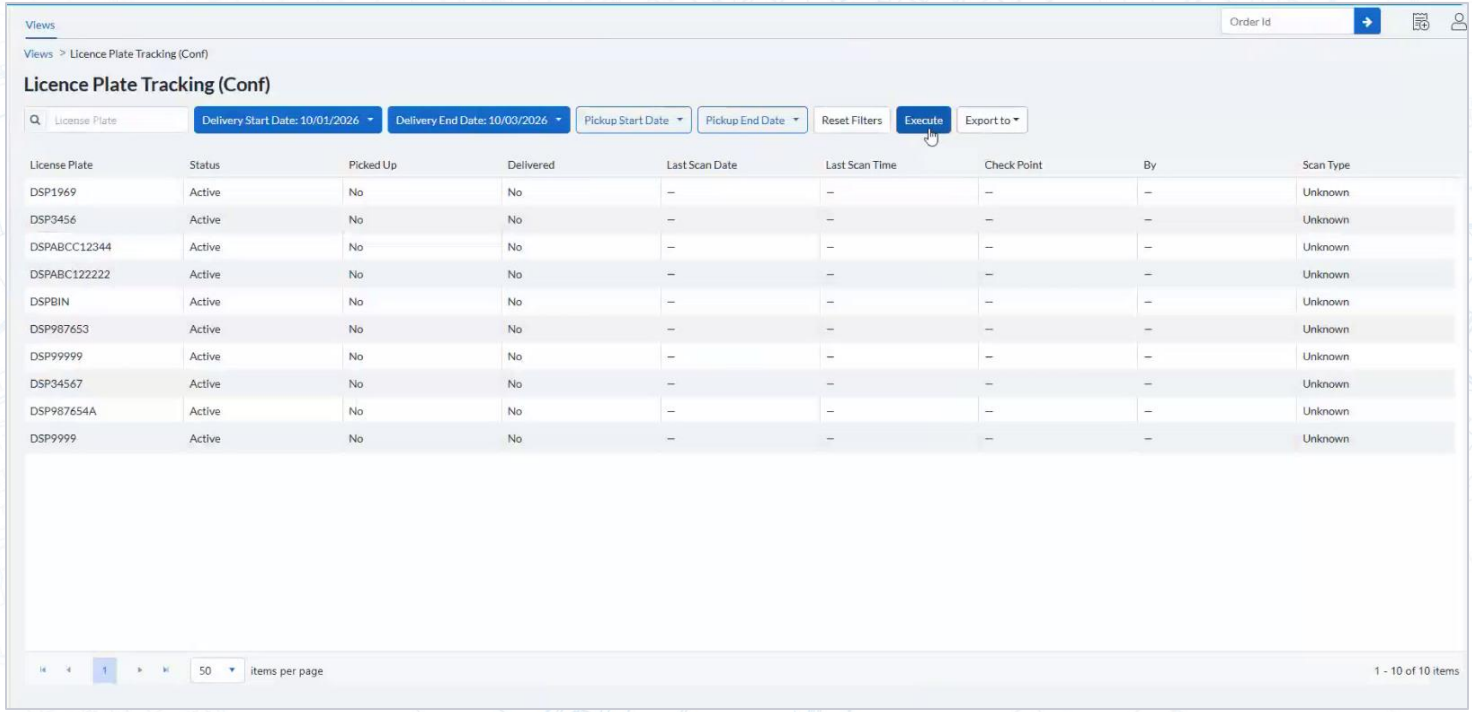
WHAT YOU GET

Loads your most recent parcels by default (up to 500), or search by barcode

- Current status of each parcel; click the order number to open the order
- Click the barcode to open its activity history: every step, by whom, and any exception codes

License Plate Tracking

An eye on your license plates — something you do not have anywhere else in the software.



USE CASES

Track license plates through your network

- Find the last scan on a plate

WHAT YOU GET

Filters: delivery and pickup start / end dates

- Status: active, picked up, delivered
- Last scan: when, checkpoint, by whom and scan type

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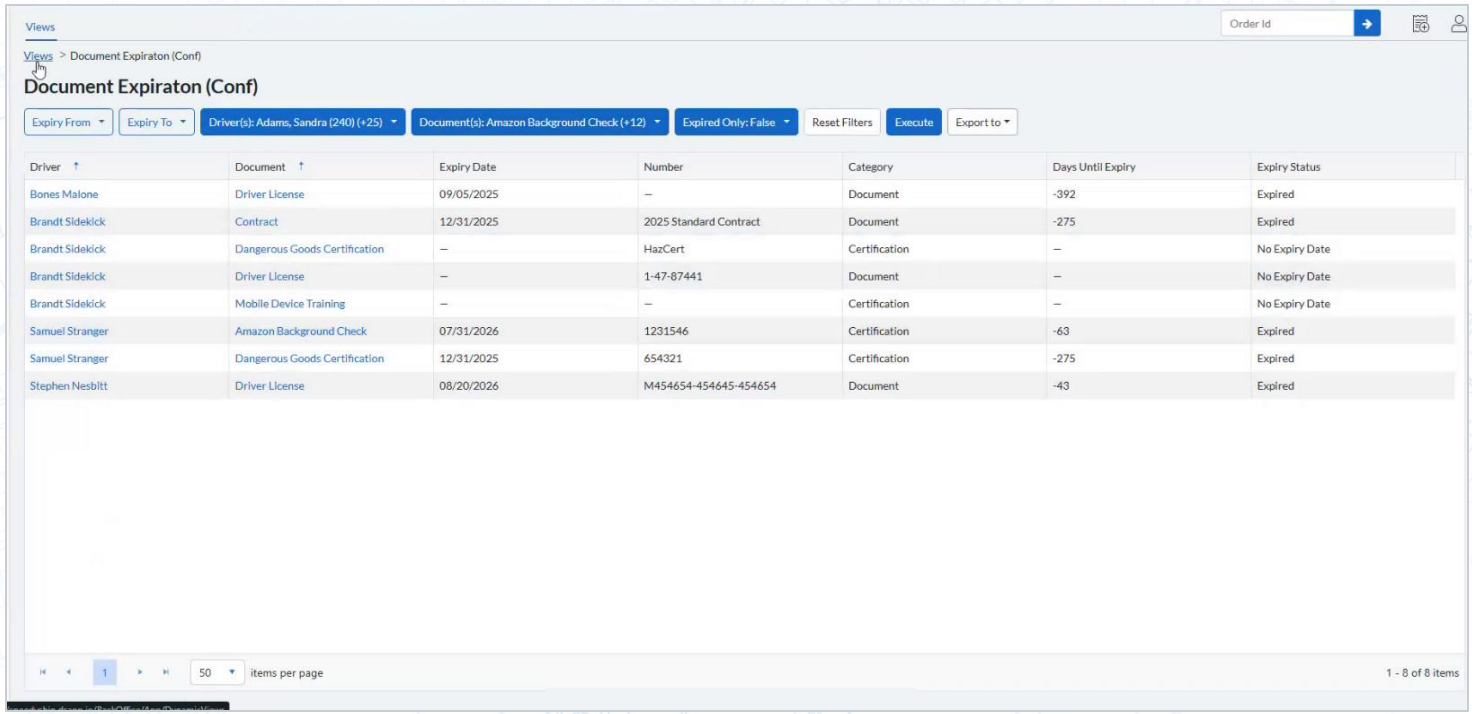
Drivers

Document and Certification Expirations · Driver Performance · Wait Time by Location

Document and Certification Expirations

Which driver documents and certifications are on file, when they expire, and how close they are.



USE CASES

"Show me every insurance document expiring next year"

- Follow up on anything expiring in 30, 60 or 90 days

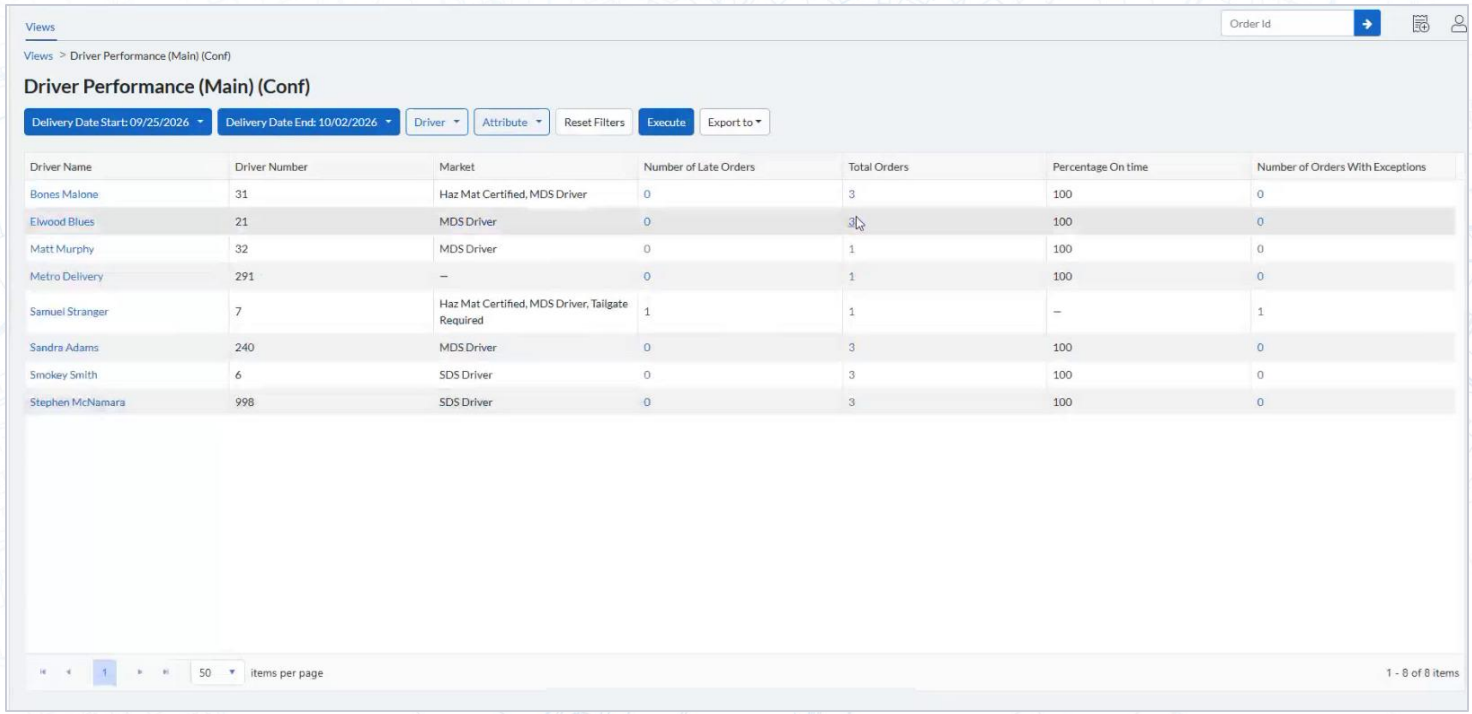
WHAT YOU GET

Filters: expiry from / to, drivers, documents, expired only

- Per document: expiry date, number, category, days until expiry, status
- Click the driver or the document to open it

Driver Performance

Each driver's on-time performance, with the orders behind every number.



USE CASES

Driver reviews and coaching

- Spot drivers with repeated exceptions

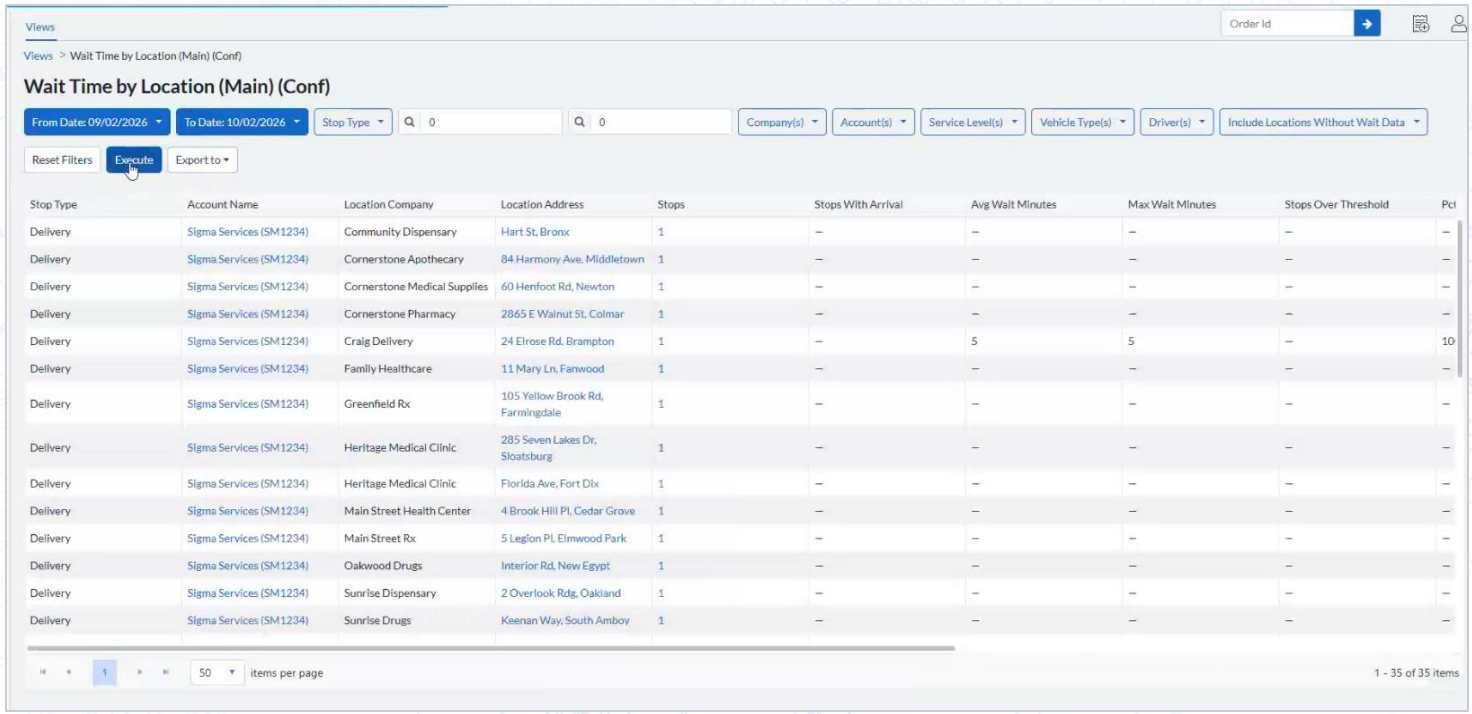
WHAT YOU GET

Per driver: late orders, total orders, on-time %, orders with exceptions

- Click late orders: each order with expected and actual arrival
- Click exceptions: the orders and their exception codes

Wait Time by Location

Where your drivers spend their time waiting — by account and by location.



USE CASES

Find the locations where drivers lose the most time

- Set realistic load times on your contacts
- Plan routes and driver days more accurately

WHAT YOU GET

Filters: dates, stop type (pickup / delivery), company, account, service level, vehicle type, driver

- Per location: stops, average and maximum wait minutes, stops over the threshold
- Click a location to see every stop: order, driver and wait time

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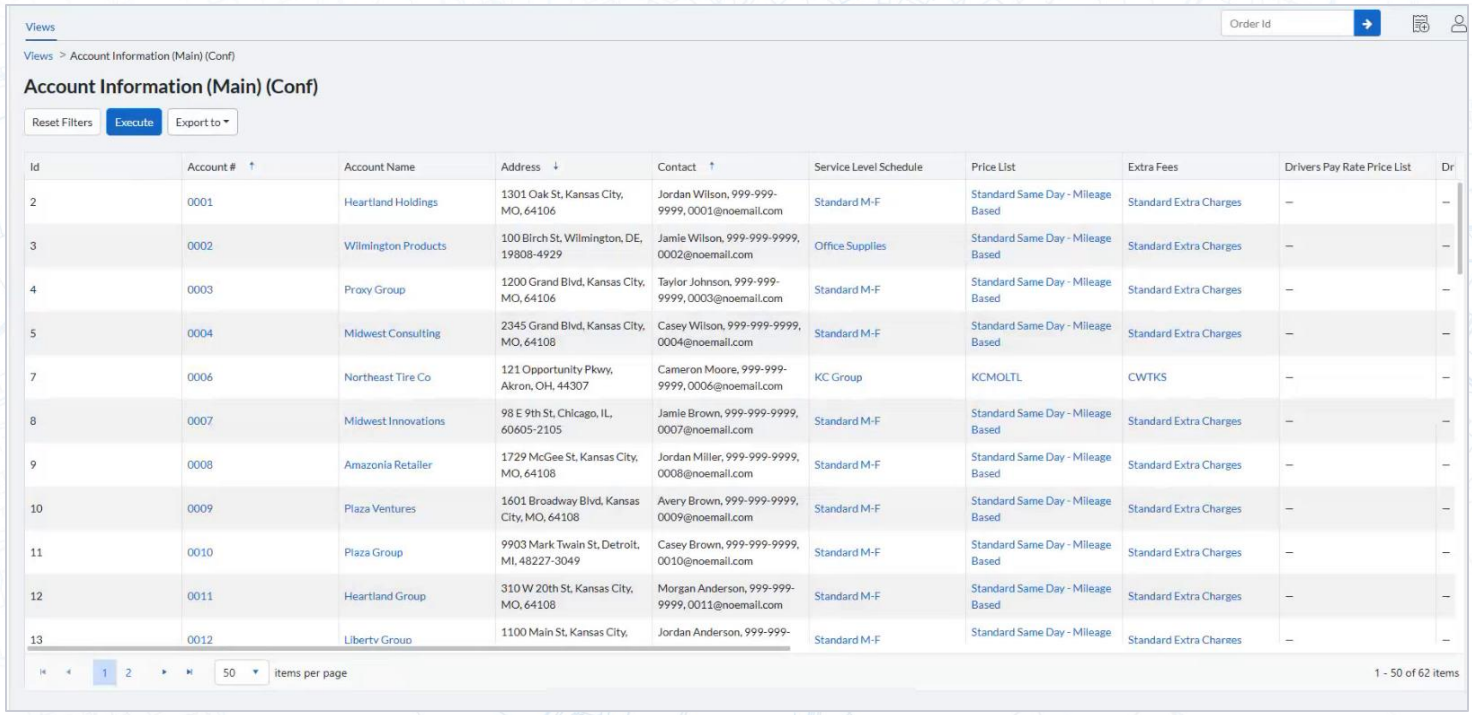
Accounts

Account Information

Account Information

More account detail than the account window, for every account on one screen.



USE CASES

Find accounts that have stopped ordering

- Audit pricing setup across customers

WHAT YOU GET

Contact, address, service level schedule, price list, extra fees, driver pay rates, order profile

- Order counts click through to an order history with total price and status
- Click first or last order created to open it

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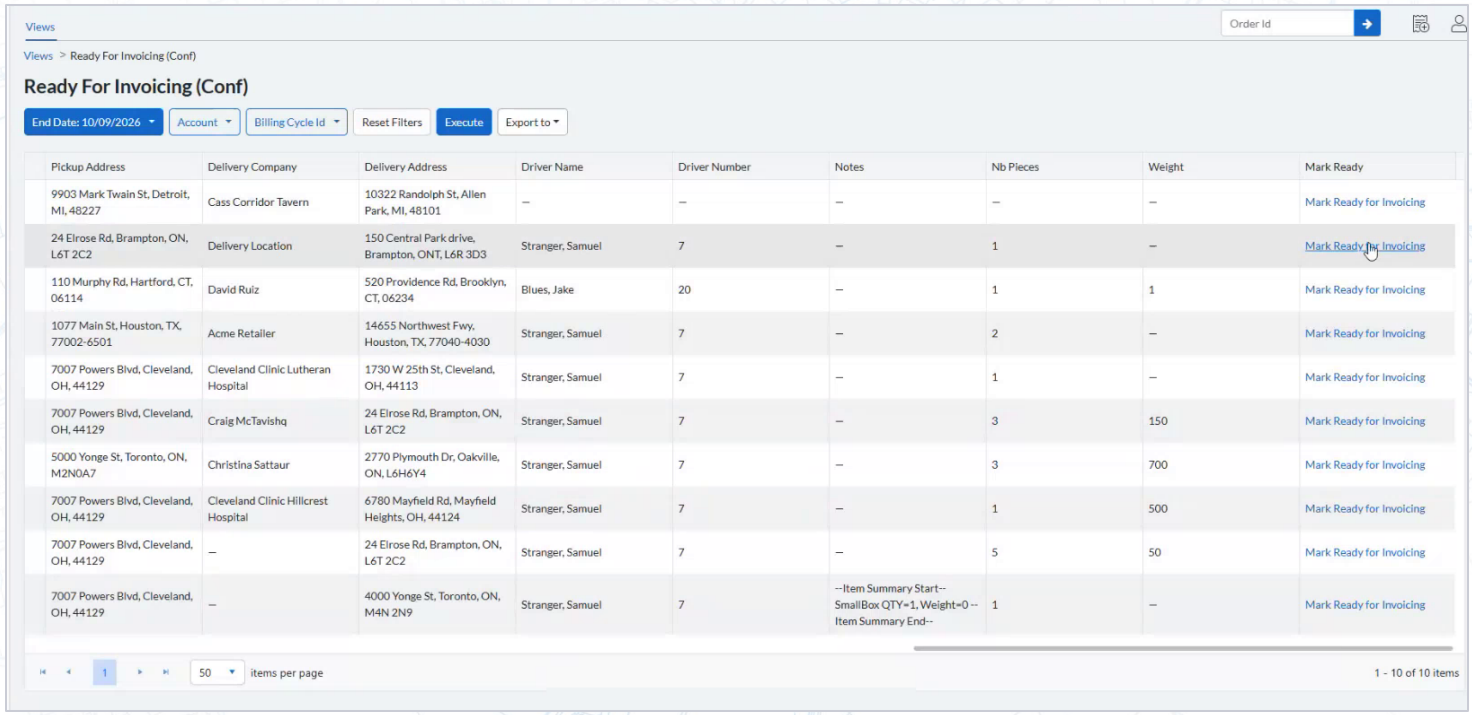
Financials

Ready For Invoicing · Ready For Settlement · Margin By Account

Ready For Invoicing

Every order waiting to be verified before invoicing — reviewed and flagged in one place.



USE CASES

Pre-invoicing verification pass

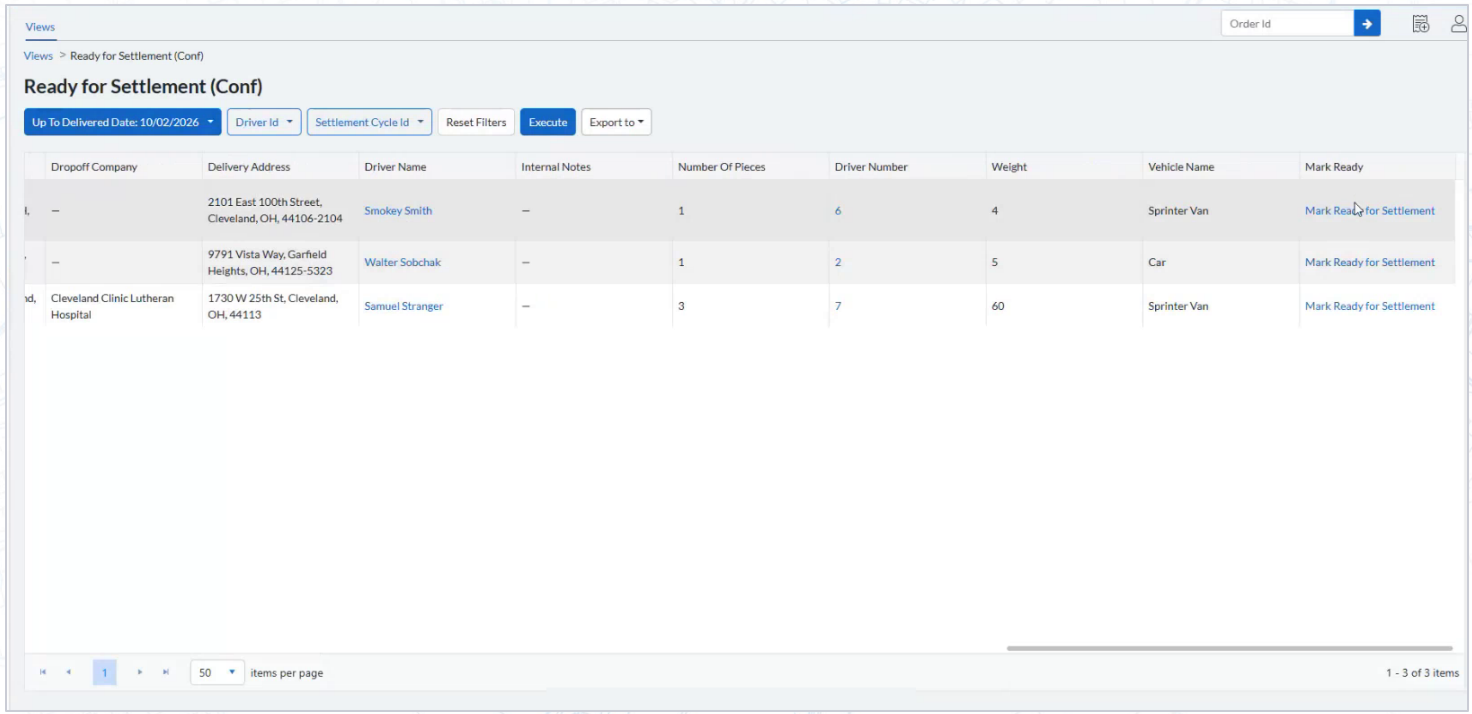
- Flag orders without opening each one

WHAT YOU GET

Filters: end date, account, billing cycle — mirrors Generate Invoices

- Every order with its details; orders open in a new window
- Mark orders Ready for Invoicing from the view

Ready For Settlement



The mirror of Ready For Invoicing: every order waiting to be verified before driver settlement.

USE CASES

Prepare the driver settlement run

- Review and flag orders before settling

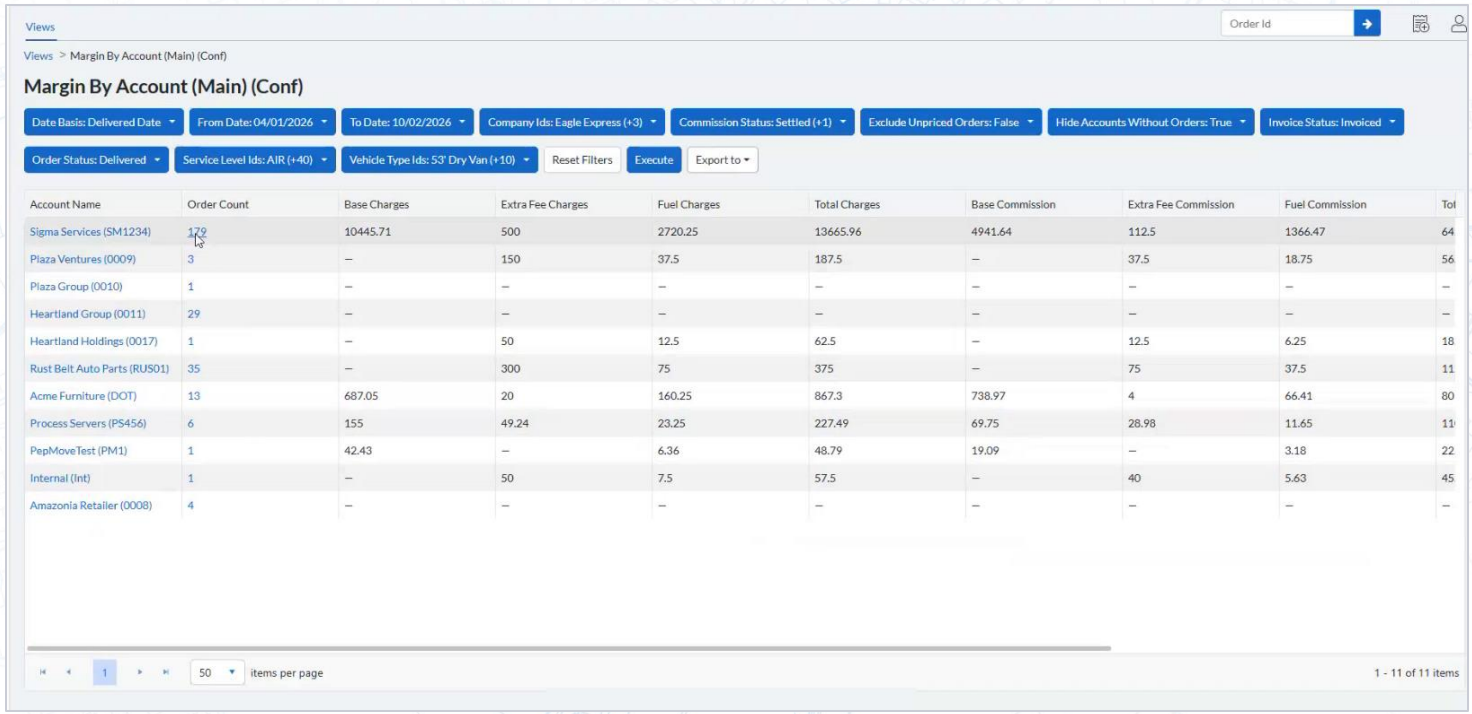
WHAT YOU GET

Filters mirror Generate Settlements: delivered date, driver, settlement cycle

- Every order with its values; click through to the driver
- Mark orders Ready for Settlement from the view

Margin By Account

How much you make on each account — in dollars and as a percentage.



USE CASES

Find your most and least profitable accounts

- Focus on margin %, not just dollars

WHAT YOU GET

Filters: pickup or delivered date, companies, commission status, invoice and order status, service levels, vehicle types

- Per account: orders, base charges, extra fees, fuel, total charges, commissions, margin $ and margin %
- Click the account to open it; click the order count to see each order, then open it

Coming to every customer

1

Free for all users

Following the user conference, these views will be turned on for every Dispatch Science customer at no cost.

2

Tell us what you need

We are open to suggestions — your feedback shapes the next versions of these views.

3

Out of time today?

Submit your ideas through the user portal, or talk to Stephen or Sean after the session.

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Thank you for your time today.

Any questions?