VERSION 2.0 | APRIL 2024

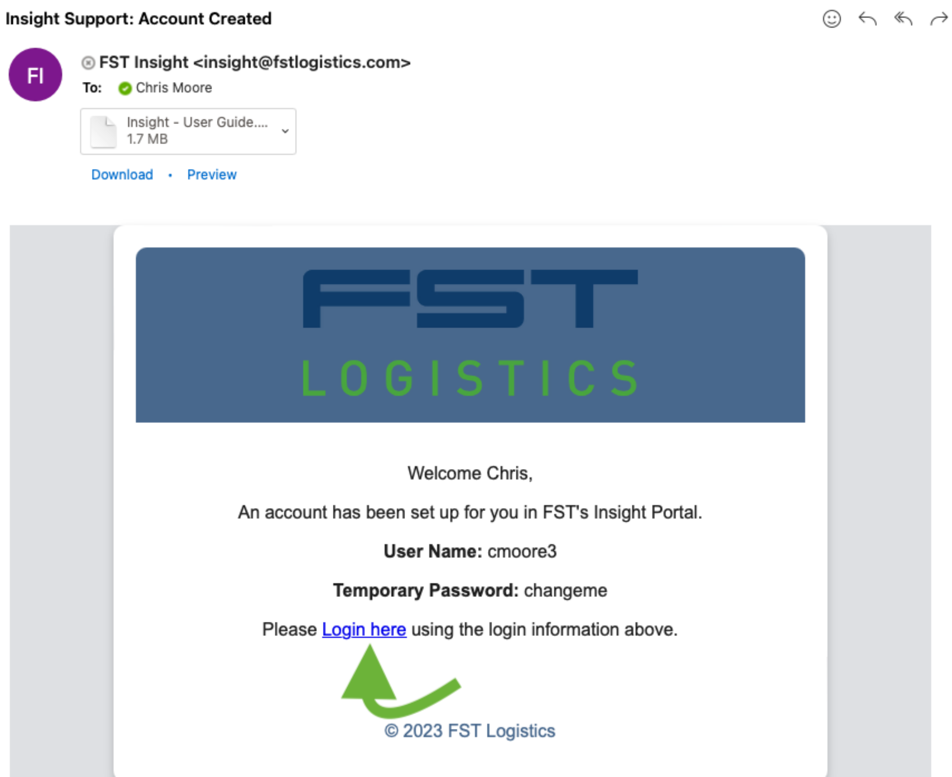
CUSTOMER PORTAL USER GUIDE

InSight

Contents

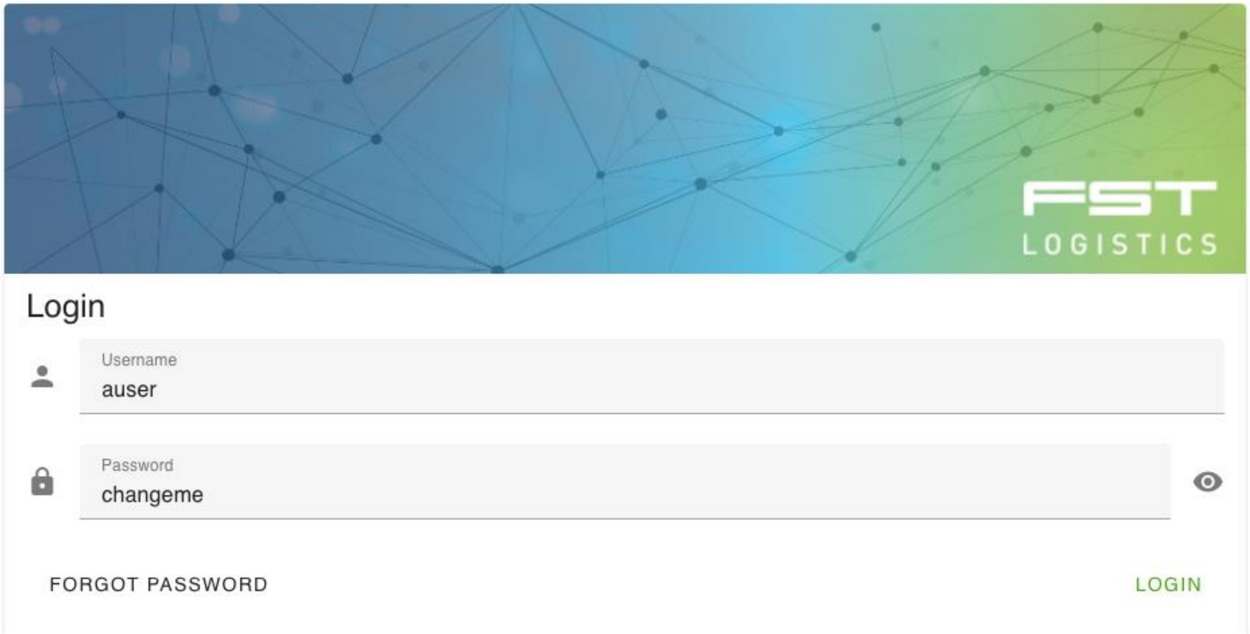
Logging in for the first time

To log into Insight for the first time, start by clicking on the link in your "Welcome" email.

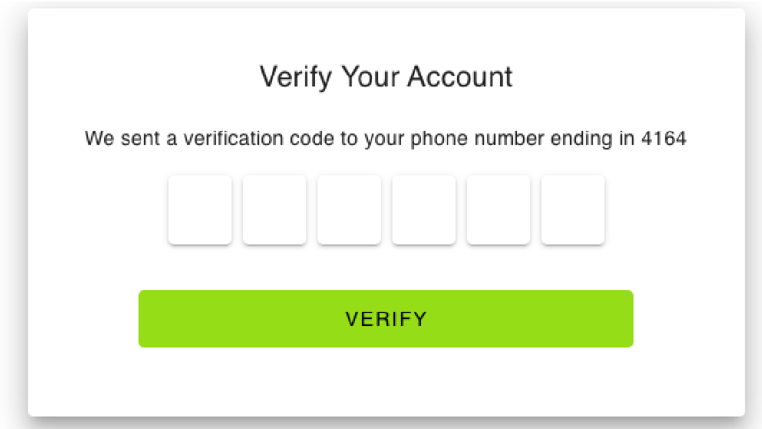


Alternatively, you can manually navigate to insight.fstlogistics.com.

Type in your username – (usually the first initial plus your last name i.e., John Smith will be user jsmith).
Enter your temporary password – changeme:

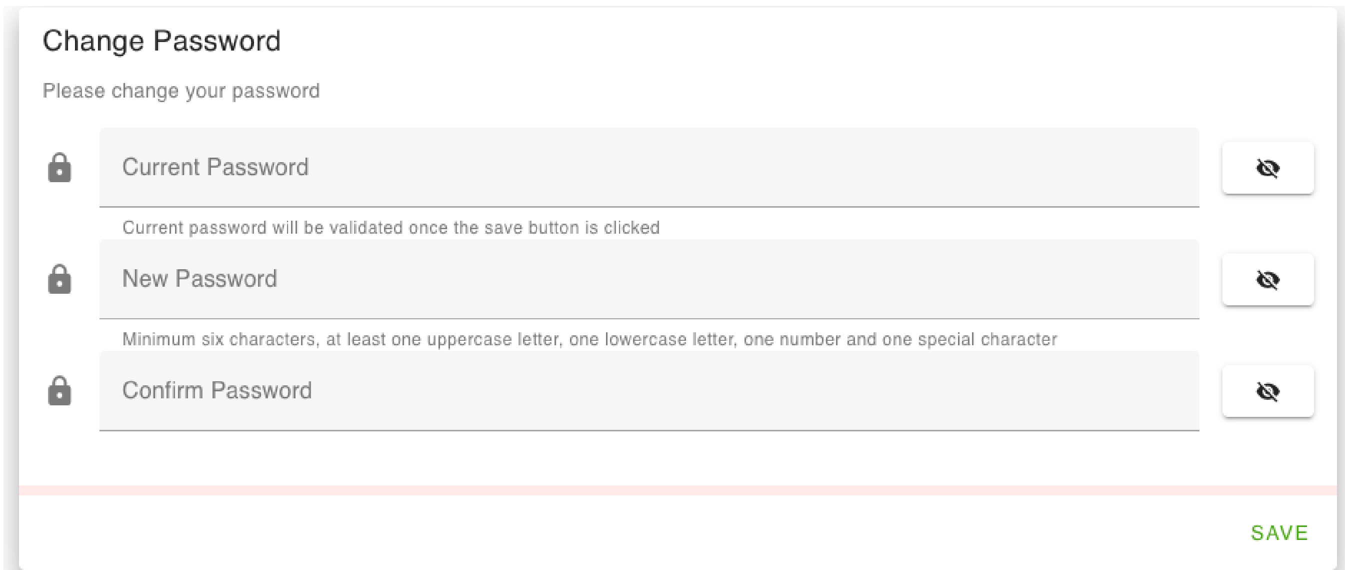


After entering the username and temporary password you will be sent a one-time passcode to the SMS capable number used when setting up your user account and redirected to the verification screen.
Enter the code from the text you receive:



You will now be asked to change your password. - Enter the old password “changeme.”

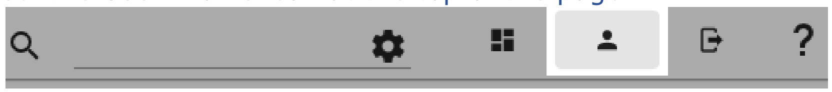
- Enter your new password twice for validation.



You will be directed to login again with your new password.

Adding a New User (Administrators Only)

Login to your account and select the User Profile icon at the top of the page.



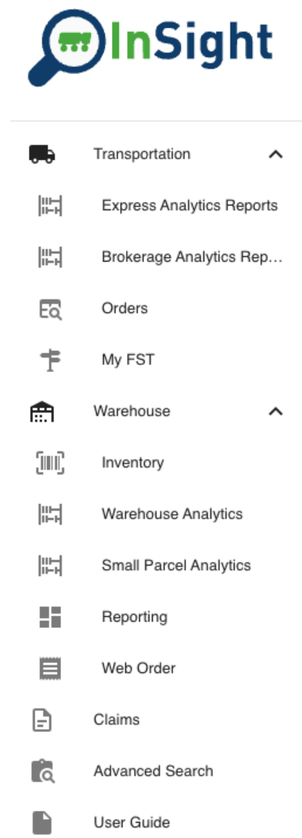
From your User Profile, select the Add User button:

Fill in all required information for the user you are adding.
Note: The phone number must be able to receive text messages. The password will default to changeme.

Hit the Save button. The user is now created.
The user will be prompted to change their password when logging in.

Site Navigation Icons

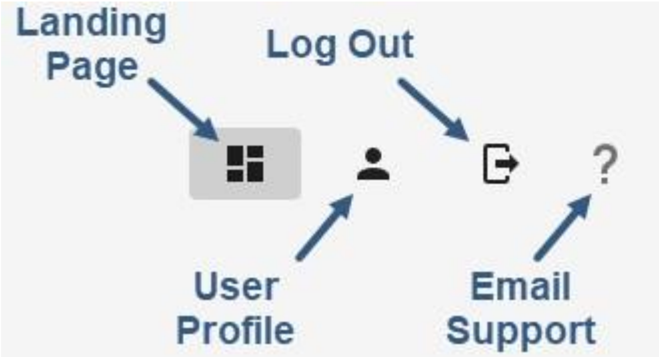
The Navigation Drawer features several buttons you can click to navigate around the site. By clicking on the truck or warehouse icon in the top left corner of the page, you can access a drop-down list of icons that will allow you to choose the section you wish to view:



Clicking the InSight logo at the top of this list will always take you back to the landing page from anywhere else in the site.

Action Icons

In the top right corner of the site are several icons that let you take an action on the site. They are available no matter what site page you are on:



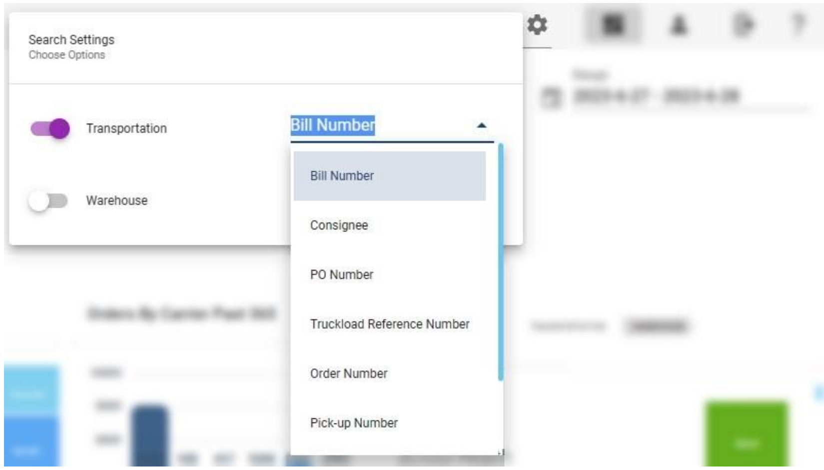
Landing Page will return you to the landing page from anywhere in the site.

User Profile takes you to your user profile page. This is also where Admins can add new users from their team.

Log Out logs you out of the site.

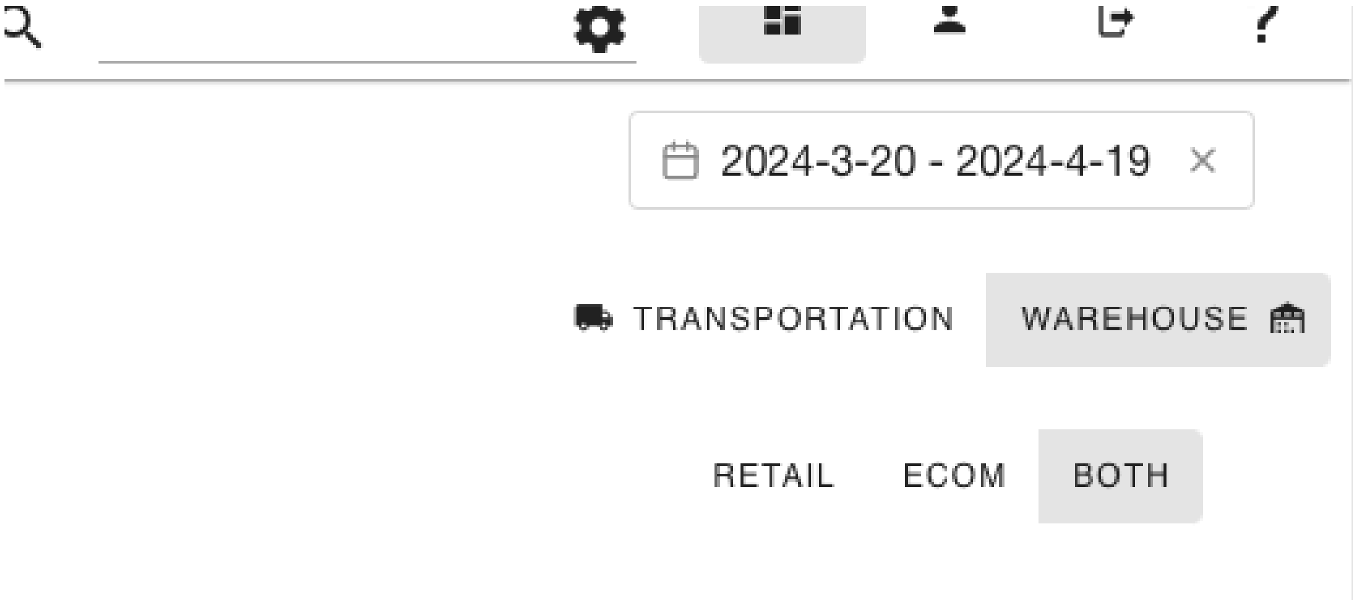
Send an Email to Support allows you to directly contact InSight Support to report a technical issue with the site.

To use the Quick Search at the top of the page, click the settings gauge to bring up the menu, then select which division and what field you want to search by:



Navigating Between Division Landing Pages

Below the date filter, you will see the option to toggle between Transportation and Warehouse:



This determines which business division the landing page is displaying data for. Note that if you only do one line of business with us, you will not see an additional option.
For our warehouse customers that we fulfill both eCom and Retail orders for, you will see the option to toggle between viewing one or the other, or both, right below this:

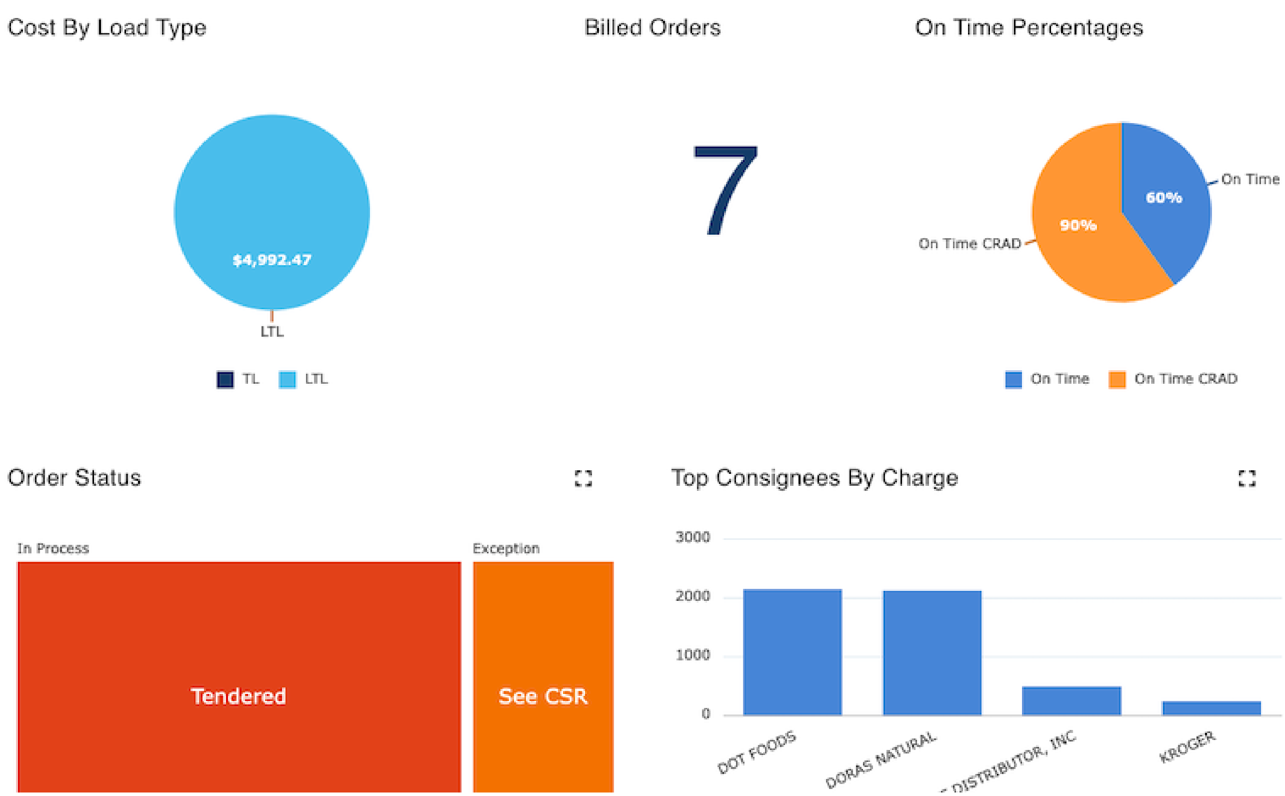
Note: changing the landing page division setting does NOT prevent you from using the side navigation icons to view information from the opposite division.

Transportation Customer Features

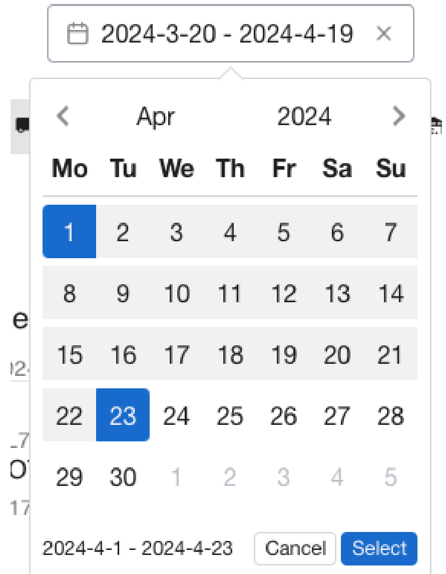
The Landing Page

KPI Gauges

In the middle of the landing page, you will notice several KPI gauges to help you monitor your business performance:



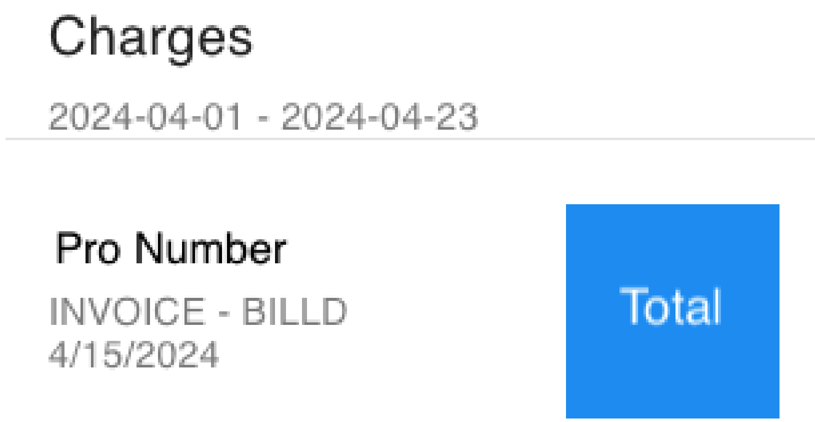
The Range selector at the top right of the page allows you to select the time range you are interested in viewing the KPIs for. Click in on this field and a calendar will pop up for you to use to choose the time span:



The KPI widgets include:
Cost by Load Type - here you can monitor how much you are spending between your LTL and TL business
Billed Orders - here you can get a count of how many orders were invoiced during a period
On Time Orders - this gauge allows you to check on FST's "On Time to Delivery" or "Due Date Performance" (please note that this does not include common carrier deliveries)
Status - this section allows you to check how many orders you have in each status (this widget does not show historical snapshots)
Top Consignee - this chart allows you to view your top five customers by spend or volume during the set period

Recent Charges

The Recent Charges table is found along the left side of the landing page. The table holds a list of orders invoiced within the selected date range:



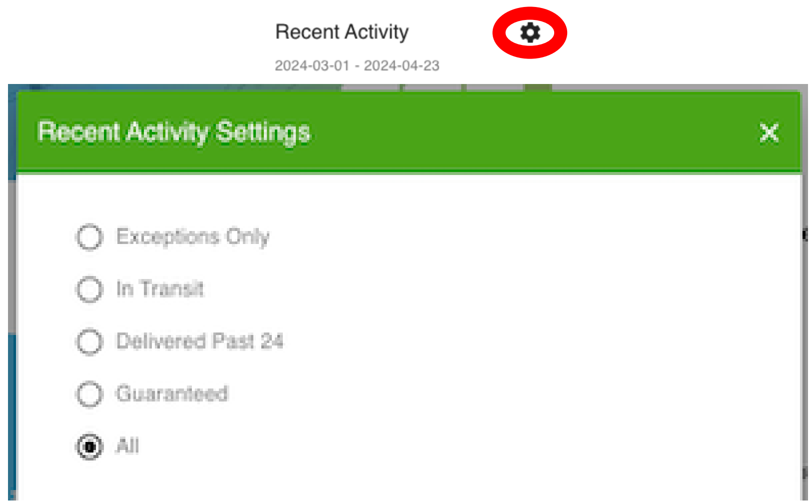
From here you can get a quick overview of what invoices you should have on hand from this period. You can also click any line and be taken directly to the **Individual Order** page to view additional details and any paperwork associated with the order.

Recent Activity

The Recent Activity table shows you the status of your orders within the FST system in the specified date range:

Hover over the status box for more details on the status code.
Most status boxes are navy blue. **RED** boxes indicate an order running late to its appointment. **ORANGE** boxes indicate an order in detention. Please note that red or orange boxes will **not** return to blue.

To filter the orders, click the gear icon in the right corner for a list of options:

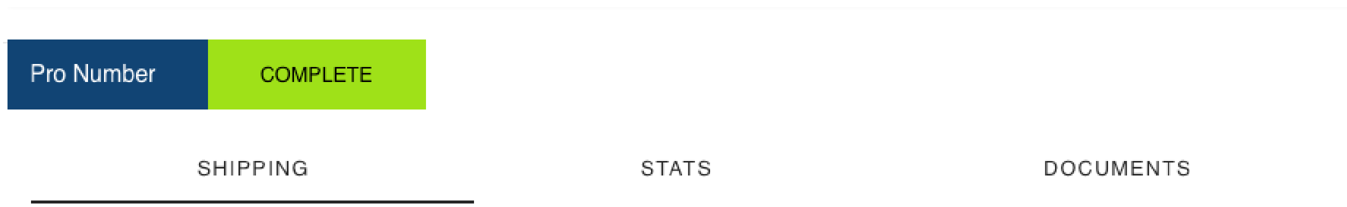


Click the order in the Recent Activity table to open the **Individual Order** page containing additional details about the order.

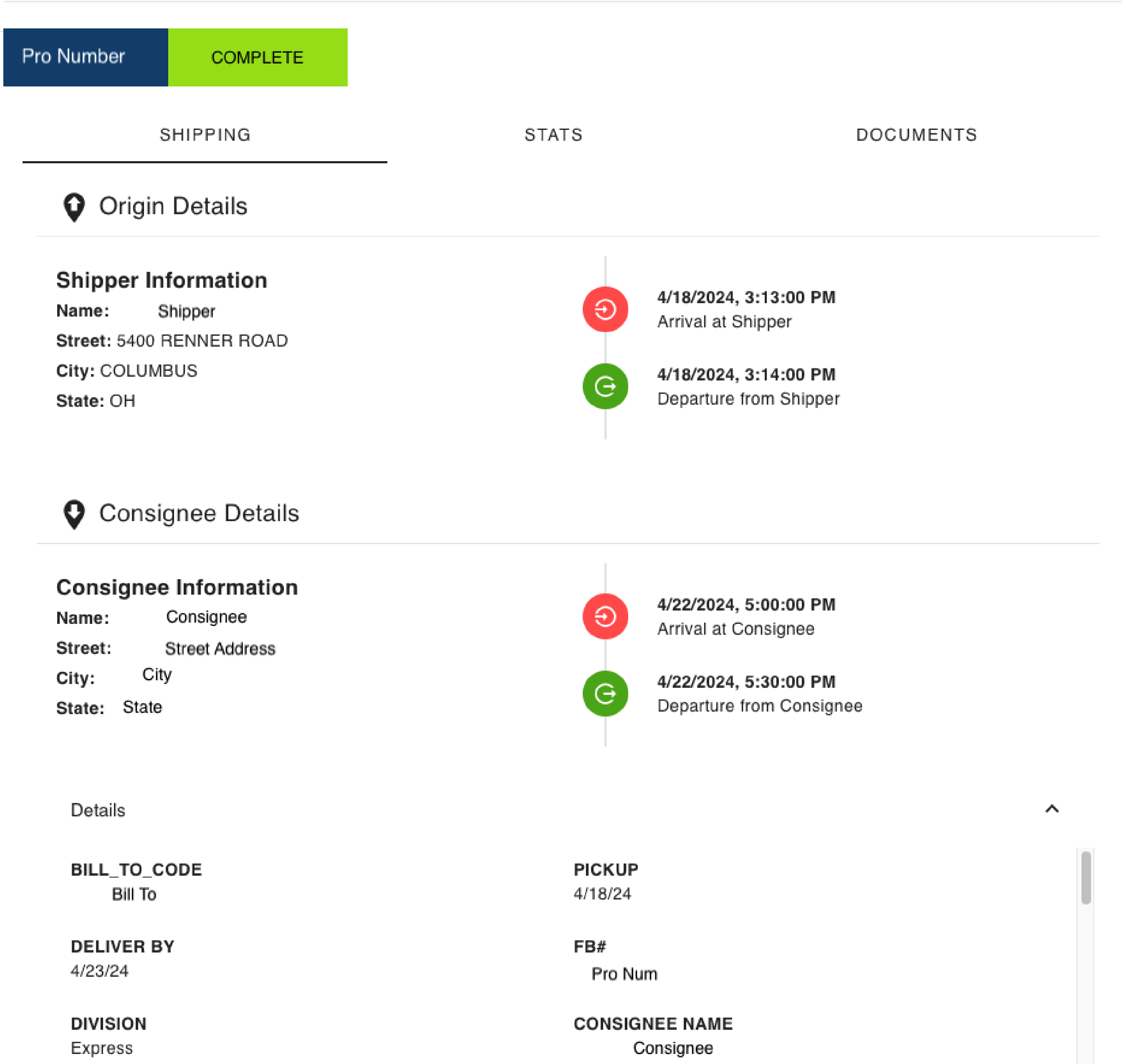
Looking up Individual Orders

To view an individual order, find the order using the Search tool, Orders page, or Advanced Search page and click the pro number of result you want to view. You are also able to drill into single orders from Recent Activity and Recent Charges.

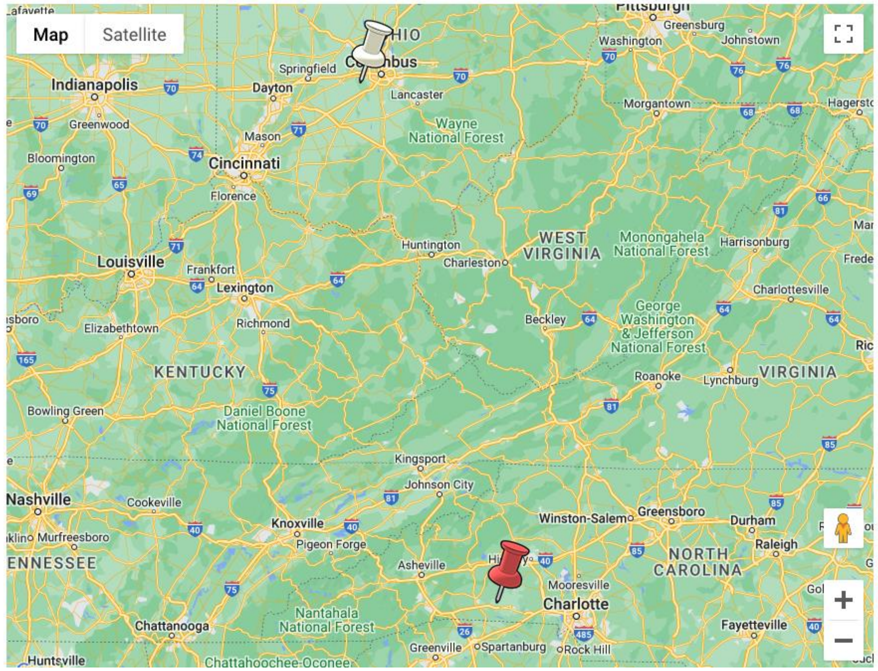
Each individual order page has three tabs – Shipping, Stats, and Documents:



Shipping displays key details of the order:



It also includes a map showing the origin and destination of the order.



Stats displays a snapshot of costs by various measures:

SHIPPING	STATS
Cost Per Pound	$0.39
Cost Per Case	$1.40
Cost Per Mile	$0.82
Cost Per Pallet	$132.69

Documents holds a list of any documents associated with the order that FST has possession of:

SHIPPING	STATS	DOCUMENTS
BILL OF LADING		

Click on any of the documents to download a copy.

Transportation Analytics Reports

The Analytics Reports sections are accessed from the drop-down menu under the Transportation icon on the left side of the page. Both pages display information meant to provide a deeper look at your spending with FST, as well as an overview of your customers. All data is displayed in both a table and a graph and is exportable.

Both sections are navigated by selecting a report from the scroll bar at the top of the page:

You can choose the period you wish to view (this will default to the previous quarter) as well as an optional comparison date range:

• Note that the dates we use are the date the freight was picked up by FST or dropped to our cross dock.

You can use the drop-down menu on the far right to quickly select a different period,

or manually choose the dates by clicking on the calendar icon

The comparison range will default to the same time frame as the initial date range, but for the previous year and will not appear until you click the Add Comparison button.

These dates will remain sticky across the reports until you exit this section or change them.

Express Reports

LTL Freight Spend

This section displays your total spend on each of our accessorial charges and what percentage of your spending they represent. It also includes a Benchmark measurement that displays the average spending of all our customers for each charge type as a point of comparison.

LTL Detention

This section displays your detention spend at each of your customers as well as what percentage of your total detention charges they represent. You can make a quick selection of what portion of your customers you would like to see using the buttons above the table:

TOP10 TOP25 ALL

LTL On Time Data

This section displays FST's on-time delivery performance. It includes both our overall performance as well as our performance when accounting for reasons outside of our control, including a breakdown of the reason we were late.

Top LTL Consignees

This section displays your top customers for the period by number of shipments, including the city and state as well as what percentage of your total shipments they represent. The buttons along the top of the table allow you to quickly select whether you would like to filter down to the Top 10, Top 25, or All.

LTL Cost Per Unit

This section displays your spending during the selected period by pound, case, mile, cube, and pallet.

LTL Orders by State

This section displays a map using a color scale to indicate what states FST is delivering your freight to most often, including the total number of shipments.

The total spend for the period you selected will be displayed across the bottom of the page throughout this section:

FUEL $23,759.26 | 18.31% ACCESSORIALS $11,809.70 | 9.1% LINEHAUL $94,159.81 | 72.58% TOTAL CHARGES $129,728.77

Brokerage Reports

Spend by Lane

This section displays a listing of the lanes FST has handled during the time frame selected, including the total times run and the overall spend.

Top Lanes by Volume

This section shows the lanes in order of the times FST has run them during the selected period.

Equipment Type

This section displays the how many times each equipment type was used by lane during the selected period.

V= Van
R= Reefer
PR= Partial Dry
PR= Partial Reefer

Please reach out to your Account Manager with further questions about equipment type translations.

On Time

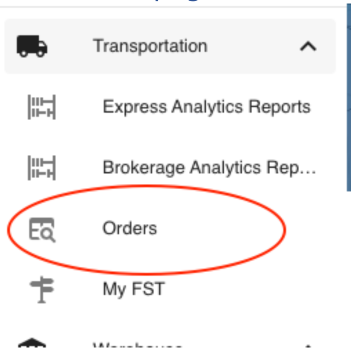
This section displays FST's on-time performance to pickup and delivery during the selected period.

The total spend for the period you selected will be displayed across the bottom of the page throughout this section:

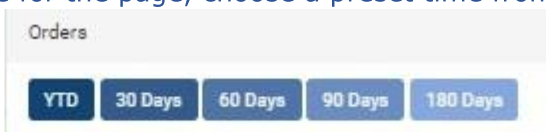
TOTAL LOADS 170 TOTAL SPEND $395,764.00

Orders

The Orders page can be accessed from the drop-down menu under the Transportation icon on the left side of the page:



To select a date range for the page, choose a preset time from the blue icons along the top of the page:



Or select your own date range using the calendar icon:

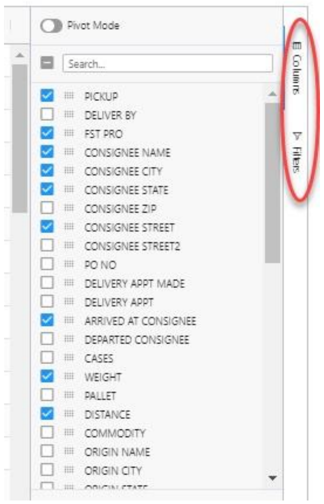
The table will display all orders managed by the FST Logistics transportation network during that period.

The data from this chart can be downloaded as an .xlsx file using the Export button above it:

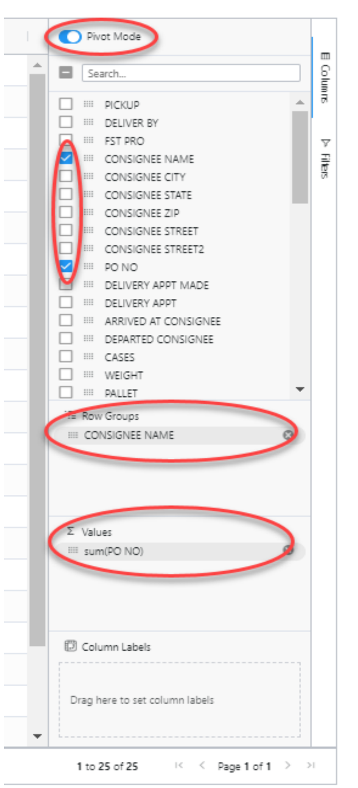
Clicking the Pro Number will take you directly to the **[Individual Order]** page for that order.

To manipulate the columns or filters in the table, select an option from the right side of the grid:

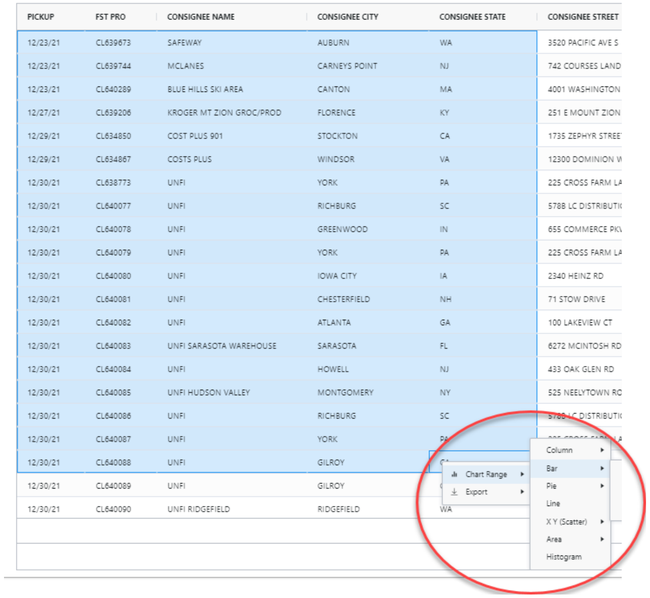
Columns can be dragged and dropped as needed within the table.



A pivot chart can be created by turning on pivot mode and selecting your preferred values:

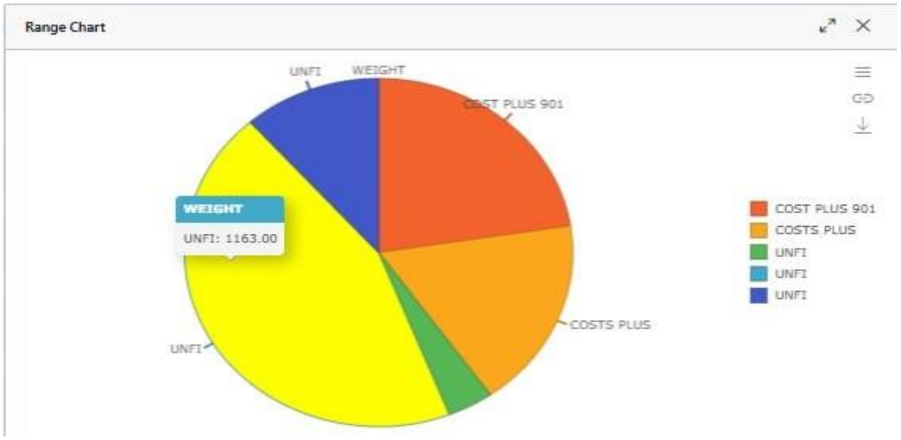


You can also export or create a chart directly from a selection of data by highlighting and right clicking:



PICKUP	FST PRO	CONSIGNEE NAME	CONSIGNEE CITY	CONSIGNEE STATE	CONSIGNEE STREET
12/23/21	CL639673	SAFEWAY	AUBURN	WA	3520 PACIFIC AVE S
12/23/21	CL639744	MCLANES	CARNEYS POINT	NJ	742 COURSES LAND
12/23/21	CL640289	BLUE HILLS SKI AREA	CANTON	MA	4001 WASHINGTON
12/27/21	CL639206	KROGER MT ZION GROC/PROD	FLORENCE	KY	251 E MOUNT ZION
12/29/21	CL634850	COST PLUS 901	STOCKTON	CA	1735 ZEPHYR STREE
12/29/21	CL634867	COSTS PLUS	WINDSOR	VA	12300 DOMINION W
12/30/21	CL638773	UNFI	YORK	PA	225 CROSS FARM LA
12/30/21	CL640077	UNFI	RICHBURG	SC	5788 LC DISTRIBUTI
12/30/21	CL640078	UNFI	GREENWOOD	IN	655 COMMERCE PKV
12/30/21	CL640079	UNFI	YORK	PA	225 CROSS FARM LA
12/30/21	CL640080	UNFI	IOWA CITY	IA	2340 HEINZ RD
12/30/21	CL640081	UNFI	CHESTERFIELD	NH	71 STOW DRIVE
12/30/21	CL640082	UNFI	ATLANTA	GA	100 LAKEVIEW CT
12/30/21	CL640083	UNFI SARASOTA WAREHOUSE	SARASOTA	FL	6272 MCINTOSH RD
12/30/21	CL640084	UNFI	HOWELL	NJ	433 OAK GLEN RD
12/30/21	CL640085	UNFI HUDSON VALLEY	MONTGOMERY	NY	525 NEELYTOWN RC
12/30/21	CL640086	UNFI	RICHBURG	SC	[illegible]
12/30/21	CL640087	UNFI	YORK	[illegible]	[illegible]
12/30/21	CL640088	UNFI	GILROY	[illegible]	[illegible]
12/30/21	CL640089	UNFI	GILROY	[illegible]	[illegible]
12/30/21	CL640090	UNFI RIDGEFIELD	RIDGEFIELD	WA	[illegible]

If more columns than can be displayed in the chart are selected, the site will choose two columns that can be used in the chosen format.



From the chart, you can take the following actions:

 expands the window the chart is in.

 allows you to manipulate the chart settings, including the color scheme, format, and what columns are being used.

 controls whether the chart is still linked to the grid, allowing the information to be manipulated directly from the grid.

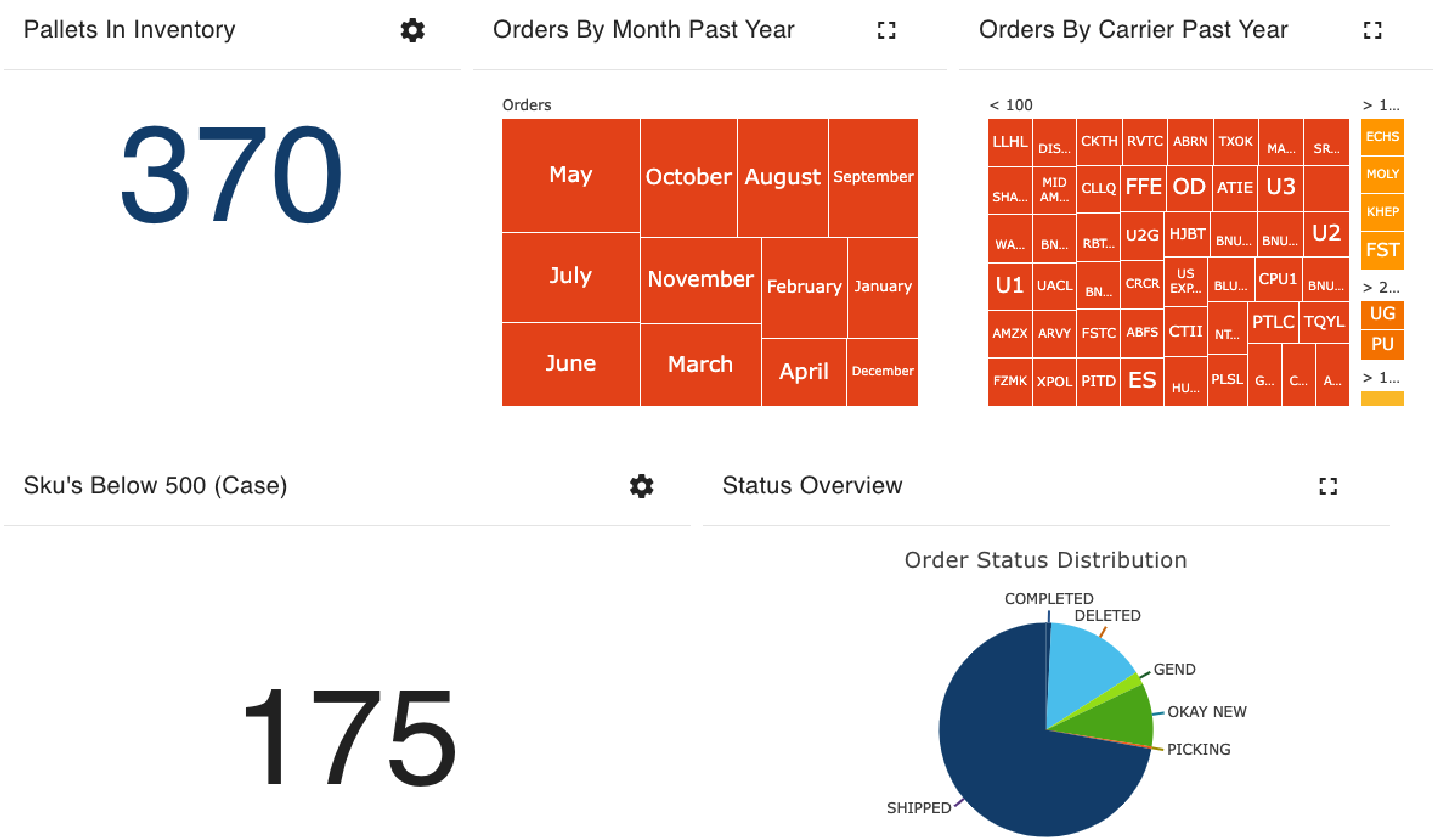
 allows you to download the chart.

If a column or selection of a column containing numerical data is selected, the following information will display in the bottom right corner of the grid:

Warehouse Customer Features

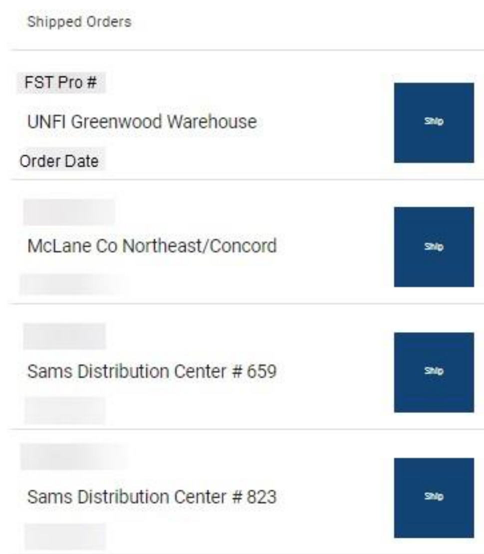
KPI Gauges

In the middle of the landing page, you will notice several KPI gauges to help you monitor your business performance:



Shipped Orders

This list shows all orders shipped during the timeframe selected in the range selector at the top right of the page. Clicking an order will open the Individual Order Page.

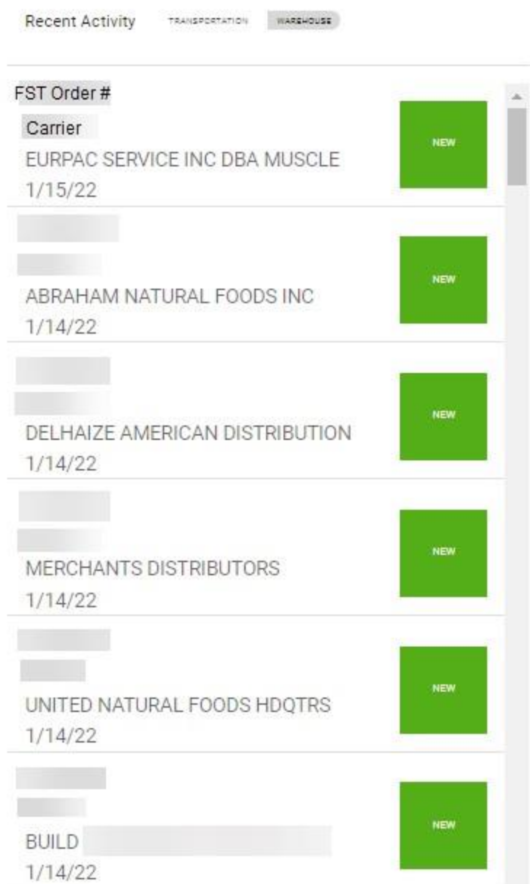


To adjust the range, click in on this field and a calendar will pop up for you to use to choose the time span:

Recent Activity and all widgets will continue displaying current information.

Recent Activity

The Recent Activity bar displays any order in our system that is not shipped, cancelled, or deleted. Clicking an order will open the Individual Order Page.

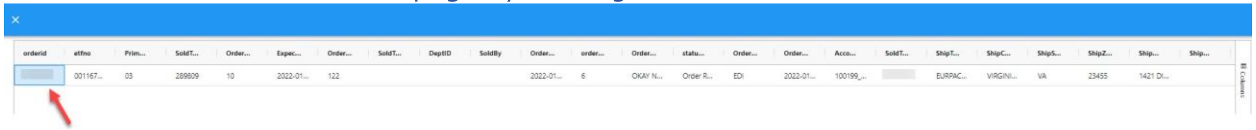


It also displays the carrier code (if assigned), the destination, and the order date.

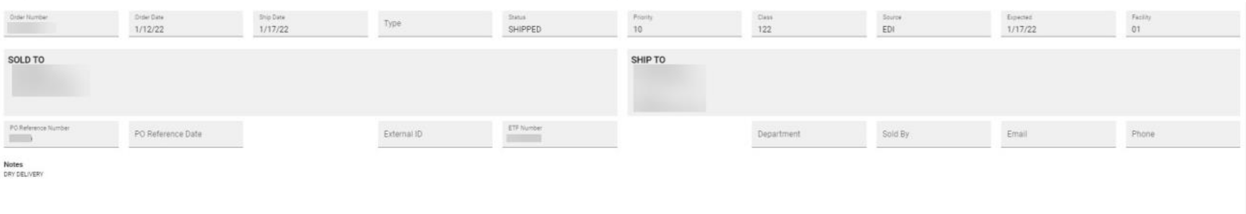
Individual Order Pages

Individual order pages can be reached using the Search or [Advanced Search]() features or by clicking the order in the Recent Activity and Shipped Orders sections.

Select the order you would like from the results page by clicking on it:

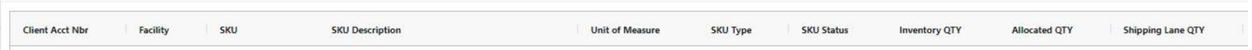


The individual order page for this selection will now open, displaying key information about the order:

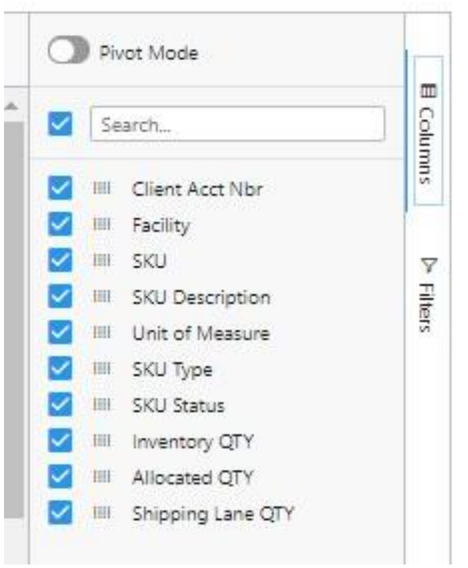


Inventory

The Inventory page provides a current snapshot of your inventory in our warehouse. The columns provide a count of the following:

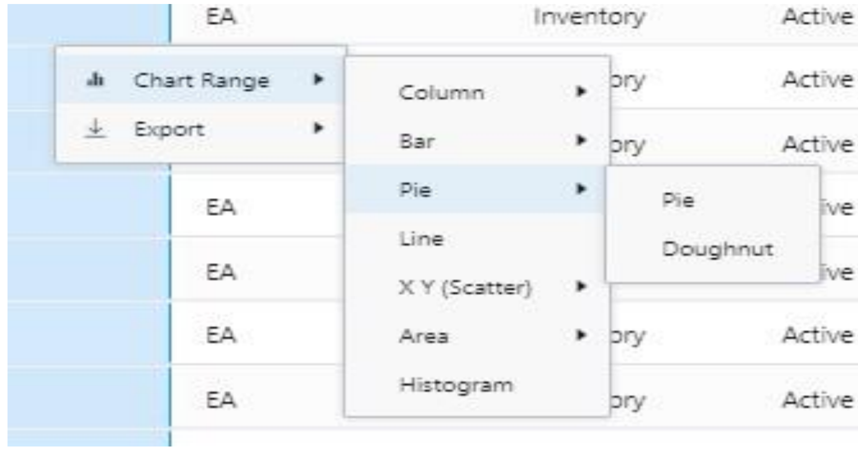


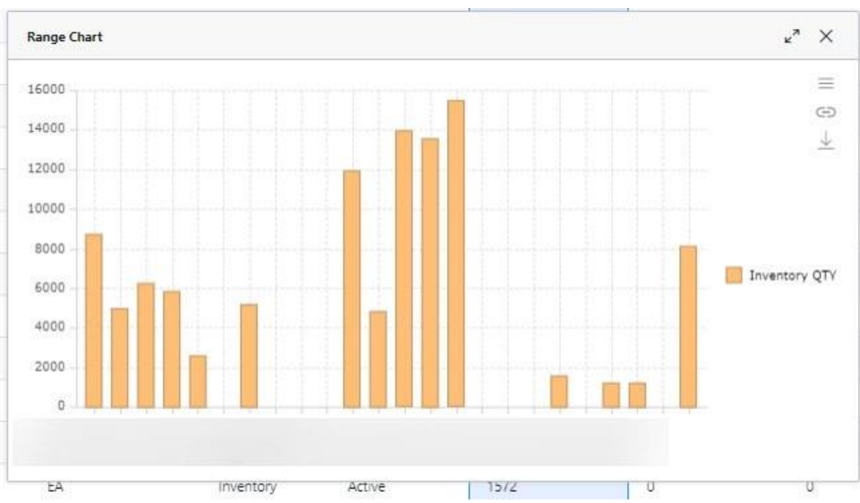
This grid can be manipulated using the Columns and Filter settings on the right:



Columns can also be arranged by dragging and dropping.

The grid can be exported as a whole, or data can be selected to create an ad hoc chart which can be downloaded on its own. To create a chart, left click and drag to select the data you want to use, then right click to choose the type of graph you would like to use:





Reporting

Both standard and customized reports can be found in the Reporting section. Click on the report and it will run immediately.

Inventory Adjustments
Adjustments made to the SKU between 2 dates

Inventory Detail
A view of current inventory at the pallet level

Inventory Receipts with LOT Adjustments
Receipt at Putaway, including information on each pallet received, between 2 dates

Inventory SKU Activity Detail
Detail level of SKU Activity for 1 or ALL SKUs and LOTS between 2 dates

Inventory SKU Activity Summary
Summary of activities for 1 or ALL SKUS and LOT.

Inventory Summary
A view of current inventory at the SKU, Class and LOT Level

Orders All
All Orders between 2 dates

Orders LOT Trace
Includes all orders shipped within a given time period by item and lot. The report shows where the corresponding product has shipped to by consignee.

Orders Open
All Orders that have not shipped or been cancelled

Orders Shipped
All Orders that have shipped between 2 dates

Orders Short and Potential Short
All Orders that have been released and have shorts OR All orders that have the potential to be short.

Reports can be downloaded in multiple formats.

Warehouse Analytics Reports

The Warehouse Analytics Reports section is accessed from the drop-down menu under the Warehouse icon on the left side of the page. This section displays KPIs focused on your orders and inventory held at our warehouse. All graphs and data tables can be exported.

The section is navigated by selecting a report from the scroll bar at the top of the page:

You can choose the period you wish to view (this will default to the previous quarter) as well as an optional comparison date range:

If FST fulfills both ecommerce and retail orders for your company, you will be able to select which part of the business you would like to see from the drop-down menu, including an option for all.

Customers receiving ASNs are grouped separately.

You can use the drop-down menu on the far right to quickly select a different period,

or manually choose the dates by clicking on the calendar icon

The comparison range will default to Last Quarter but will not appear until you click the Add Comparison button.

These dates will remain sticky across the reports until you exit this section or change them.

Weekly Volume/Monthly Volume

These sections break down the count of outbound shipments during each week or month during the selected period.

Volume by State

This section provides a heat map and table with the volume of shipments to each state during the selected period.

Order Profile

This section shows the total number of packages and units shipped month by month within the chosen date range.

Lines per Order

This section displays the average SKU count during each month of the selected period.

SKU Velocity

This section shows the quantity of each SKU shipped during the selected period, broken down by month.

Cycle Count

This section provides the results of FST's cycle count performance during each month of the selected period.

Inbound Pallet Volume

This section displays the inbound pallet volume for each month of the selected period.

Outbound Pallet Volume

This section displays the outbound pallet volume for each month of the selected period.

Pallets on Hand

This section gives a snapshot of the total pallets on hand on the first day of each month in the selected date range.

SLA

This section displays the average number of days taken to ship your orders from our warehouse.

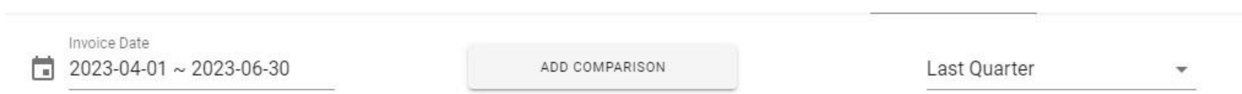
Small Parcel Analytics

The Small Parcel Reports section is accessed from the drop-down menu under the Warehouse icon on the left side of the page. This module provides a look into all the charges related to small parcel business through several different lenses. Please note that these views are meant for analytics purposes ONLY, and payments should be made only based on invoices sent by FST.

All graphs and data tables can be exported.

The section is navigated by selecting a report from the scroll bar at the top of the page:

You can choose the period you wish to view (this will default to the previous quarter) as well as an optional comparison date range:



You can use the drop-down menu on the far right to quickly select a different time

frame, or manually choose the dates by clicking on the calendar icon

The comparison range will default to Last Quarter but will not appear until you click the Add Comparison button.

These dates will remain sticky across the reports until you exit this section or change them.

Charges by Month

This section displays the total charges for small parcel broken out by month. It also includes the average billed rate vs. the tendered rate, as well as charges and base rate per pound and per package.

Charges by Service Level

This section displays the same categories as Charges by Month, but they are broken out by service level (Ground, Air, etc) and Commercial vs. Residential.

Charges by Zone

This section shows the same breakdown of charges and averages but shows them broken down by ship to zones.

Charges by State

This section displays the total charges as noted above; however, they are broken down by ship to state.

Interactive Map

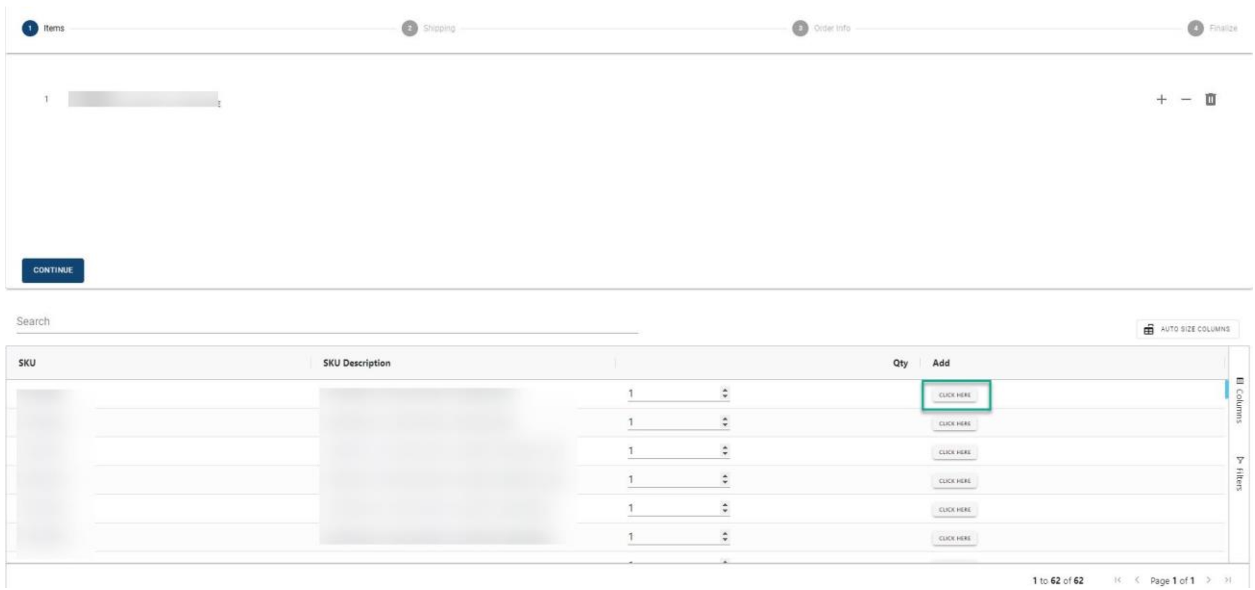
The Interactive Map section displays a heat map that can be changed to display any of the columns tracked in the other sections via a drop-down menu. All the information can also be seen by hovering over a state.

Invoice Detail

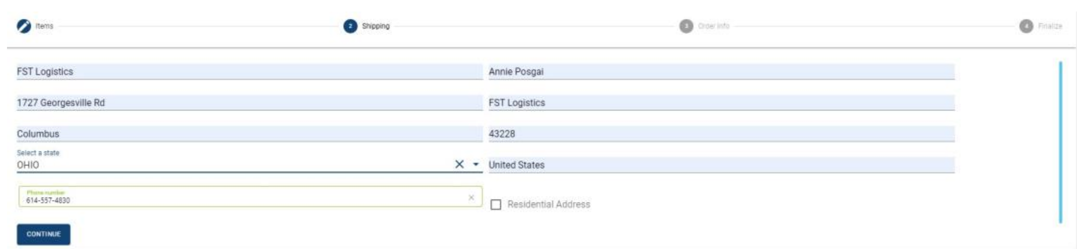
This section contains a downloadable table containing the charges by order during the selected time period.

Web Orders

To place a web order, select the Web Orders icon in the Site Navigation pane. This will open to the order form. Select the items and quantity you would like to add to the order – be sure to click Add Item for each:

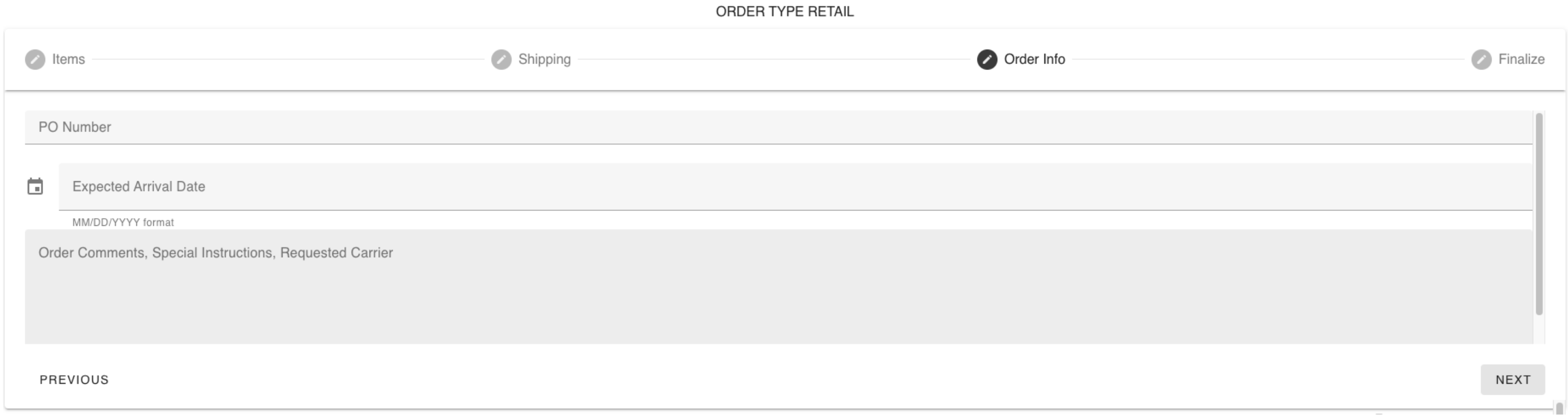


Next, you will fill out the shipping information:

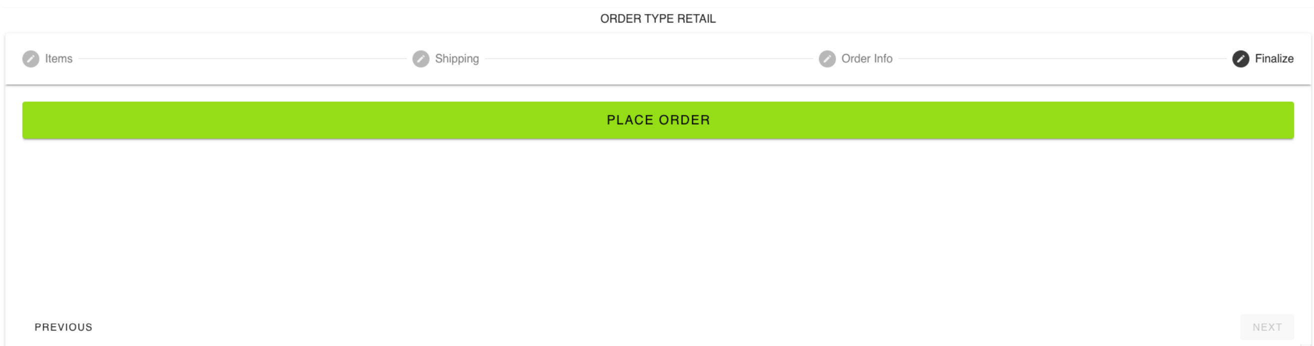


NOTE: A Name is required. You can enter the company name twice if you do not have an individual name.

The Order Info page allows you to enter any additional specifications you need:

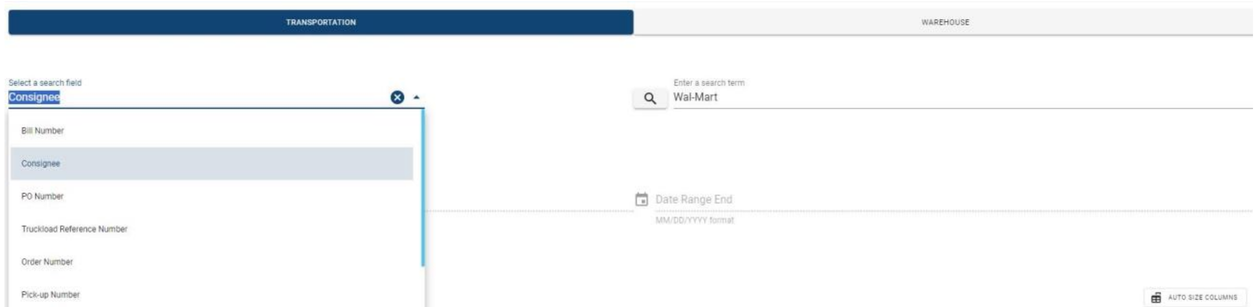


Finally, be sure to click “Place Order” to ensure the order is submitted:

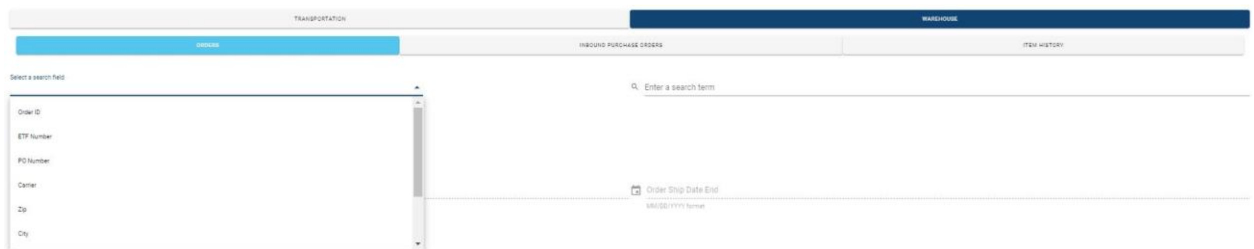


Advanced Searches

Transportation Advanced Searches can be run using any of the trace number types sent to FST on an order, as well as Consignees. Once you run a search, a table will appear at the bottom of the screen containing the order(s) that meet your criteria.



Warehouse Advanced Searches can be run to locate Orders, Inbound Purchase Orders, or Item History. Select the search type you would like to run, then select how you would like to search from the drop-down list:



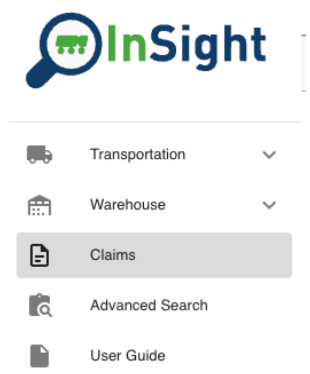
Search types that could contain multiple results (i.e., State or Zip Code) will allow you to select a date range to search within.

Order searches will display the items on the order below the results.
Inbound Purchase Order searches will display the items on the inbound order below the results.
Item History will display the inventory activity that has taken place for the selected item.
All these grids are exportable.

Claims

All Claims View

In the navigation drawer click the claims link to view existing claims.



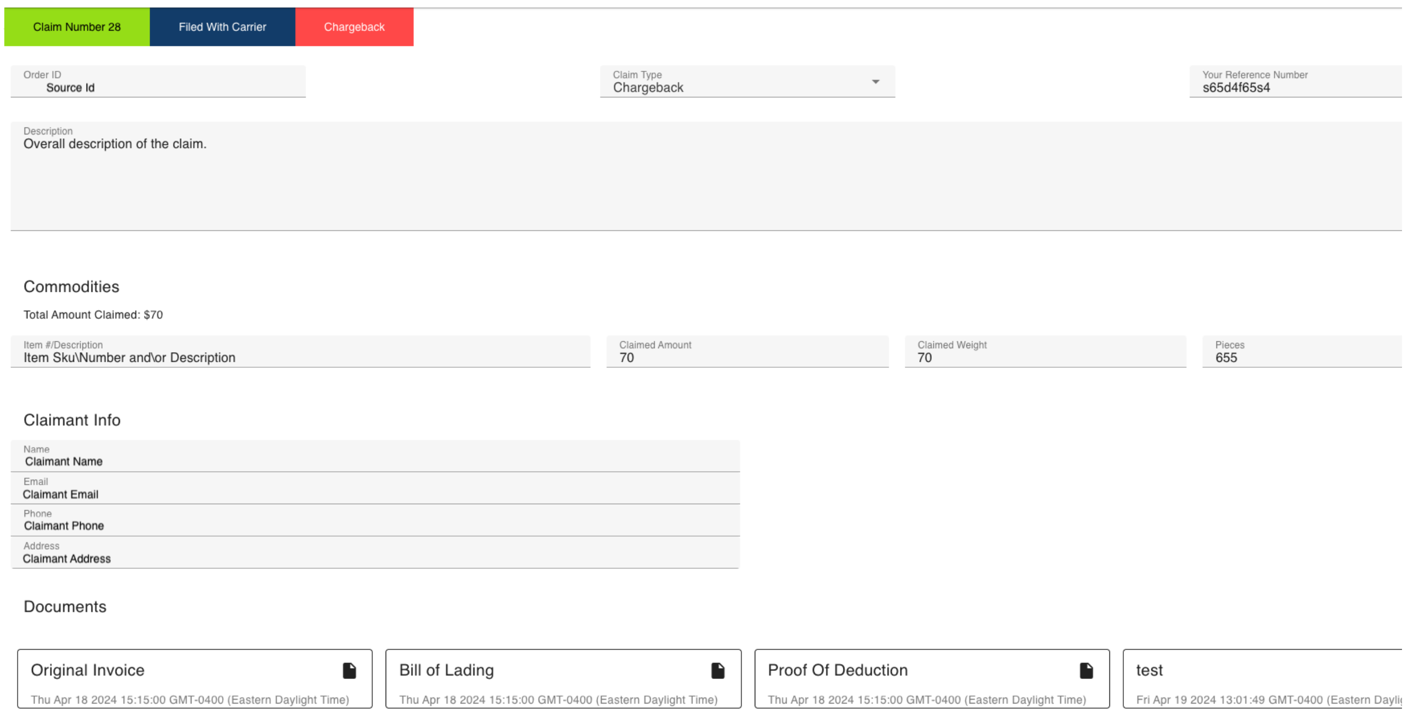
Click the Claim Id to view the claim or click the Order Id to view the source item.

Claim Id	Order Id	Claim Status	Source System	Claim Desc	Claim Date	Claim Documents	Commodities	Claimant Type	Cor
7	Pro number\OrderID	Pending (Additional Do...	Aljex	Test	2024-03-06T00:00:00	1	0	Other	Chr
25	Pro number\OrderID	New	Aljex	Test Desc	2024-04-16T00:00:00	3	0	Other	Chr
26	Pro number\OrderID	Filed With Carrier	TruckMate	Test	2024-04-16T00:00:00	3	0	Other	Chr
27	Pro number\OrderID	Filed With Carrier	Aljex	sdfsdf	2024-04-18T00:00:00	3	1	Other	Chr
28	Pro number\OrderID	Filed With Carrier	TruckMate	sdfsdfd	2024-04-18T00:00:00	4	1	Other	Chr
29	Pro number\OrderID	Sent To Accounting	TruckMate		2024-04-18T00:00:00	0	0	Client	

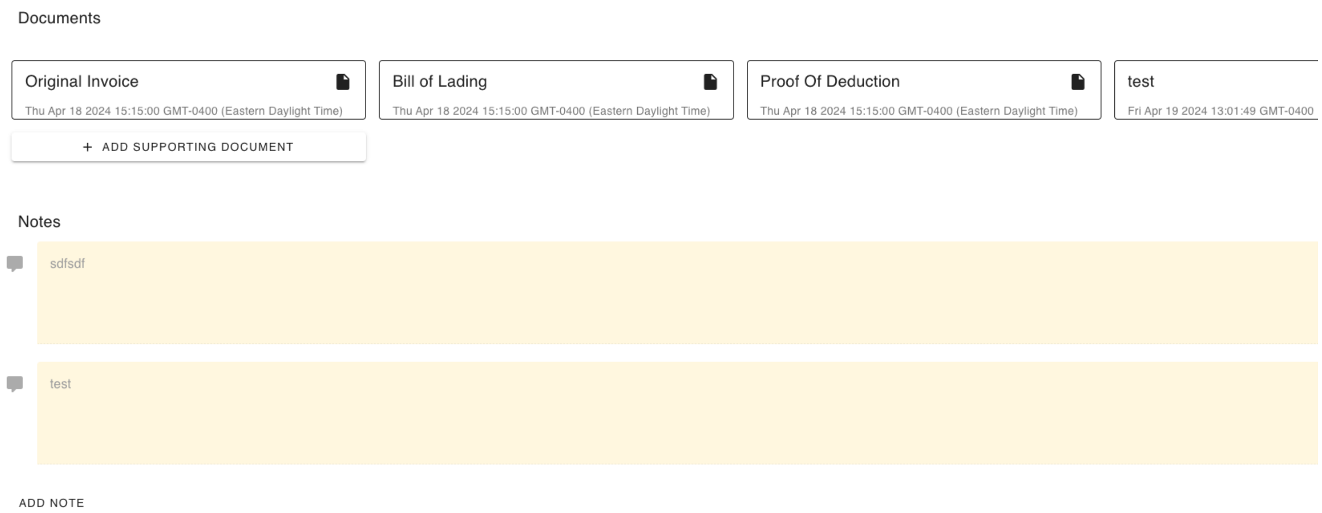
View an individual claim

At the top of the Individual Claim Screen, you can see tags for the Claim Number, Claim Status, and Claim Type.

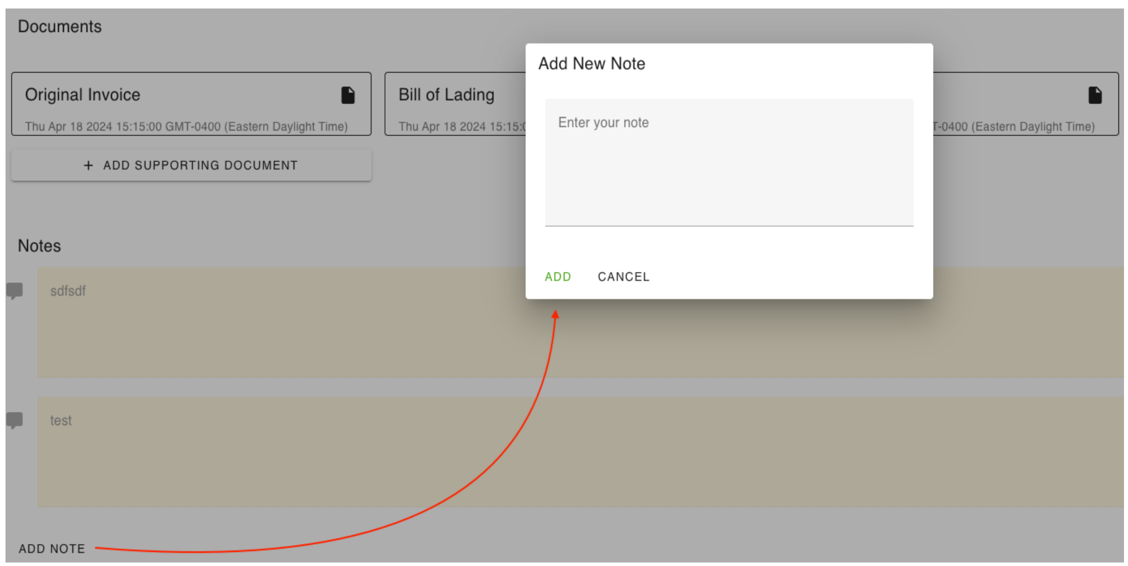
In the upper portion view claim screen, you can see additional claim details, claimant information, and documents attached to the claim.



Below the documents section are notes. Notes are a way for you to communicate additional details between you and FST's claims administrators. When notes are added to the claim both you and the claims administrator will receive an email notification.

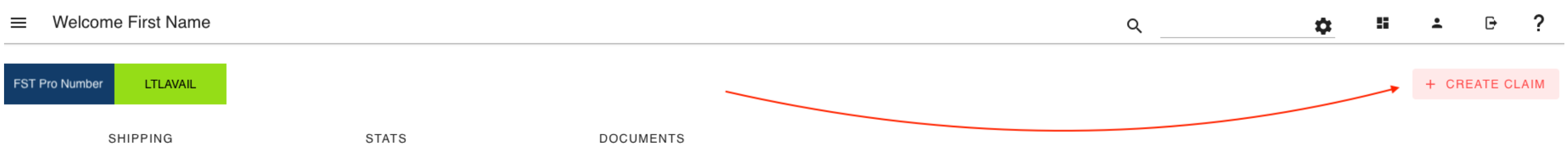


Click the Add Note button at the bottom of the screen to add a note. Enter the note text and click Add.

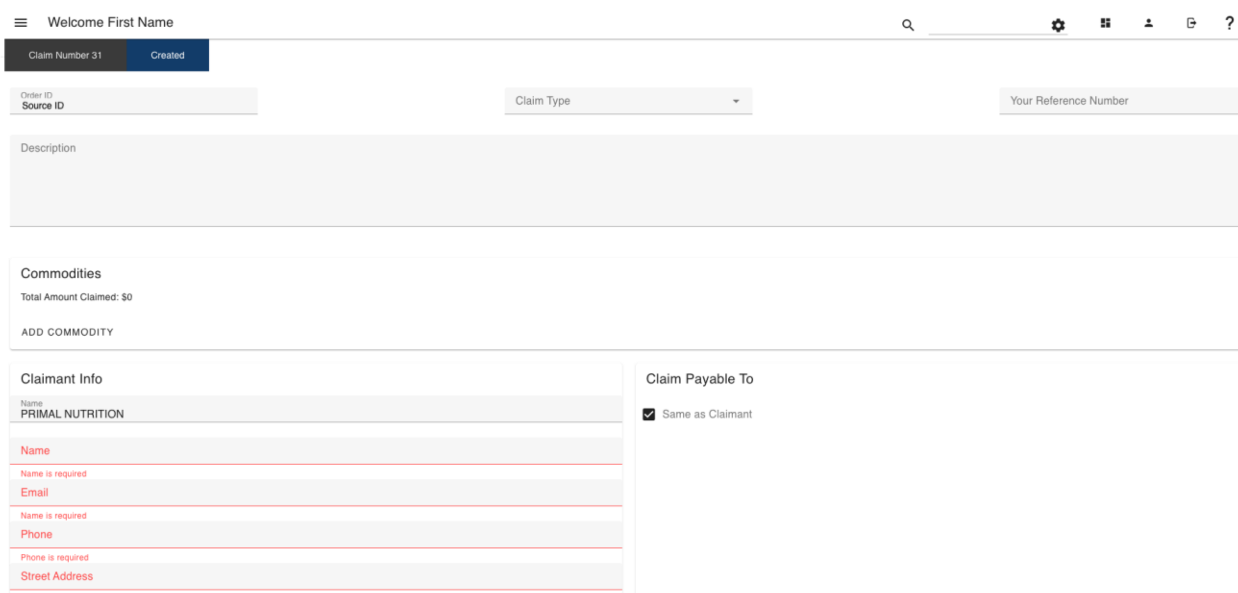


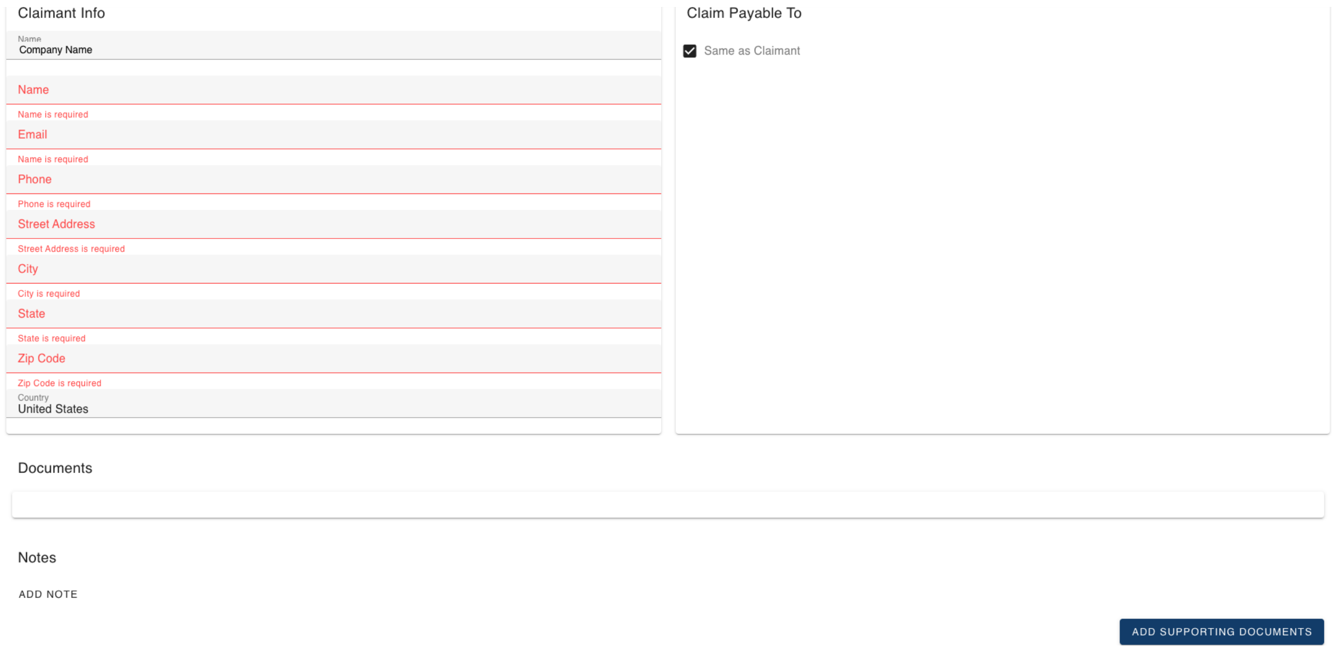
Claim Creation

Navigate to an individual Freight Bill or Warehouse Order and click Create Claim in the upper right corner.



After clicking Create Claim you will be redirected to the Edit Claim Screen. This is where you will enter claim information, provide initial required documents, and add any notes you would like to provide FST's claim administration.

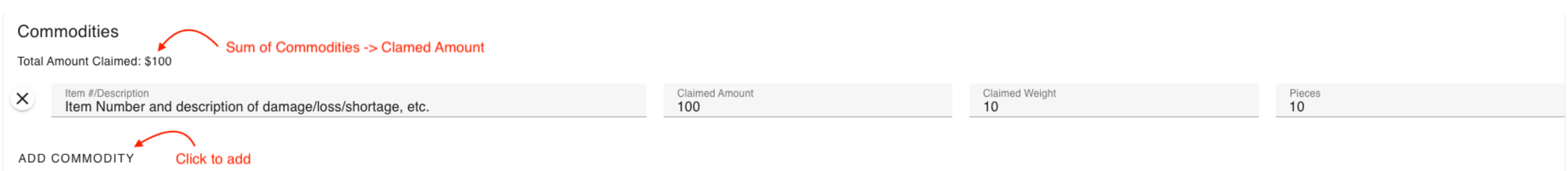




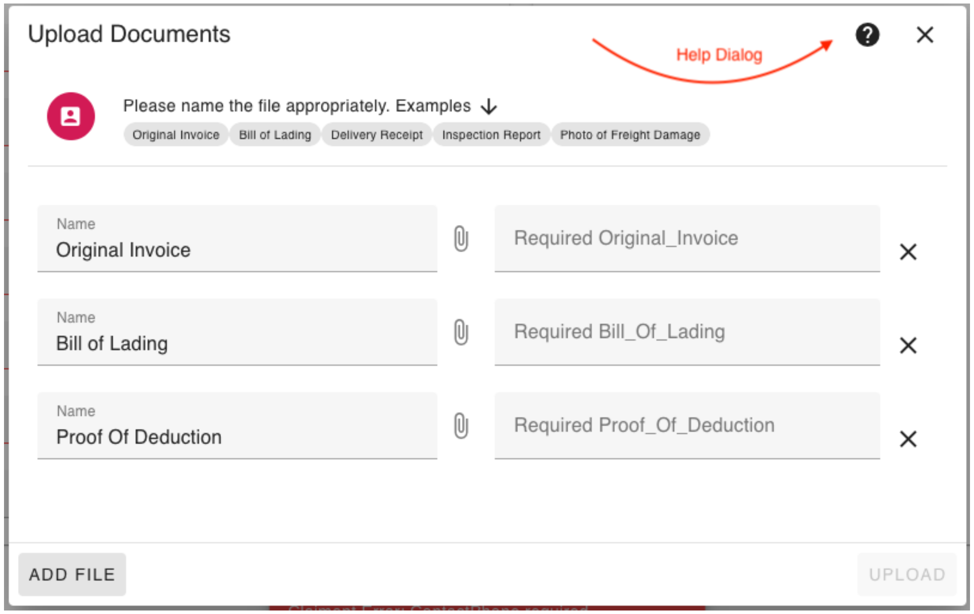
In the screenshot above you can see the fields for entering the claimant information. This will be used by FST's claim administration once a claim is settled for sending payment if applicable. If there exists a claimant for your company, this will fill in automatically, but can be edited or changed by you. If the Claimant information is different than the payee, you can uncheck the Same as Claimant box and enter the information for where payments should be sent.

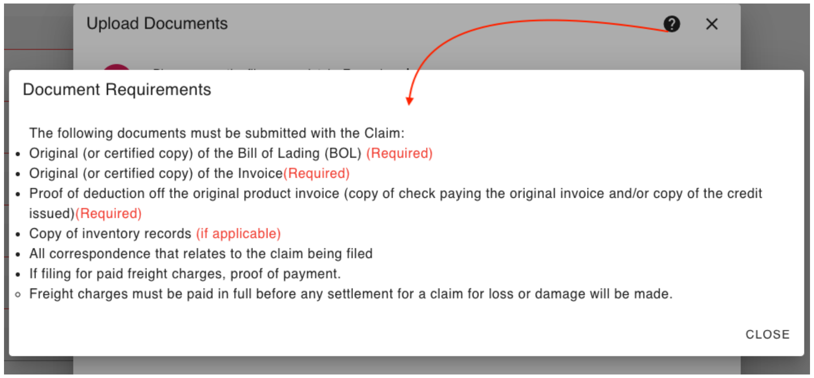
Claim Commodities

Clicking the "Add Commodity" button will add a row to the commodities collection. Add any relevant information in the "Item#/Description" field. Add as many commodities as appropriate. Enter what the "Claimed Amount" is, the "Claimed Weight" for the commodity (if applicable), and the number of "Pieces" claimed (if applicable).

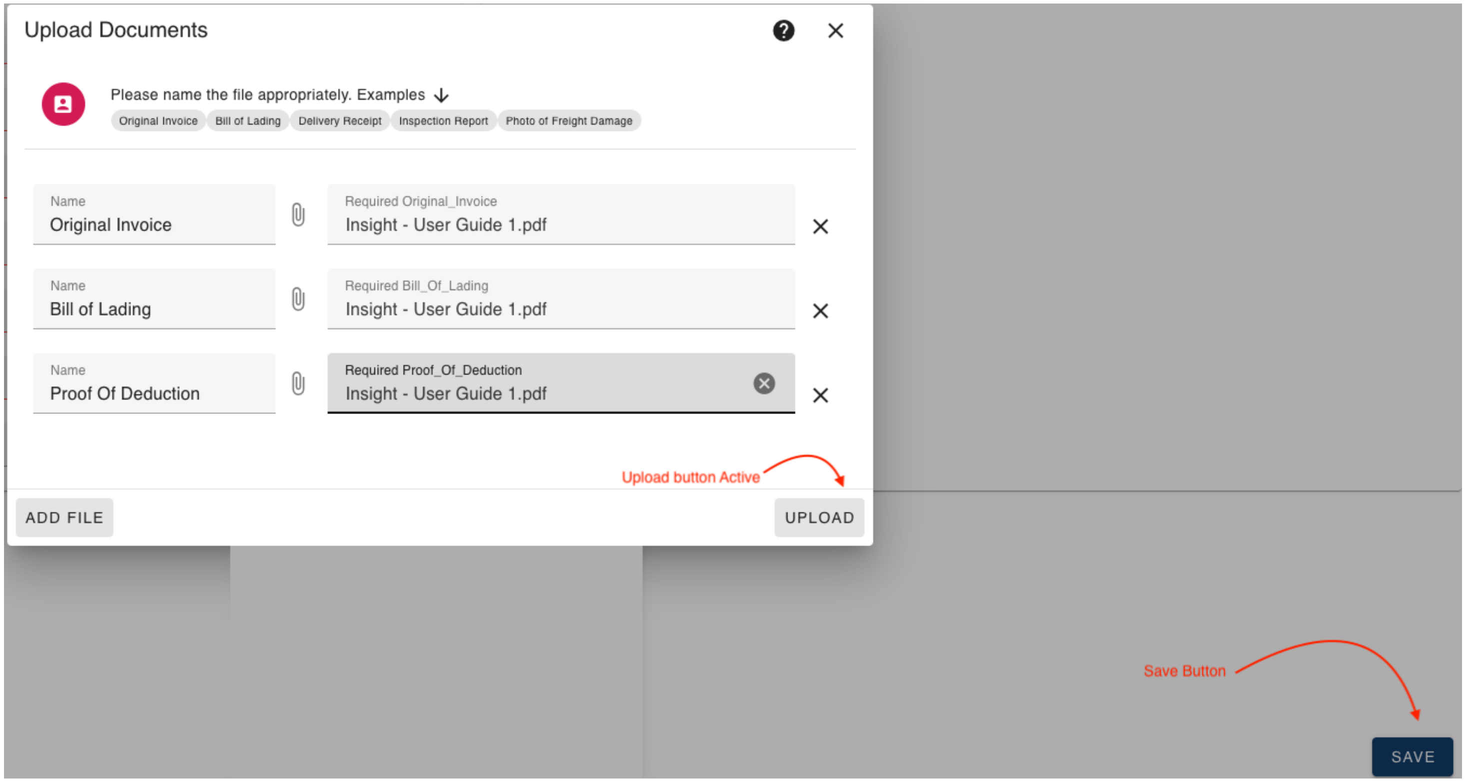


The button in the lower right corner of the claim will say "Add Supporting Documents" initially. There are certain documents that are required before a claim can be processed. Once the button is clicked a dialog will appear to allow you to upload files. This dialog has a help button in the upper right that has additional information for required and other documents. Inputs for required documents a pre-populated, you just need to add the corresponding files. If you have additional documents, you can click the add file button to add additional inputs. Be sure to provide an appropriate name for the file.

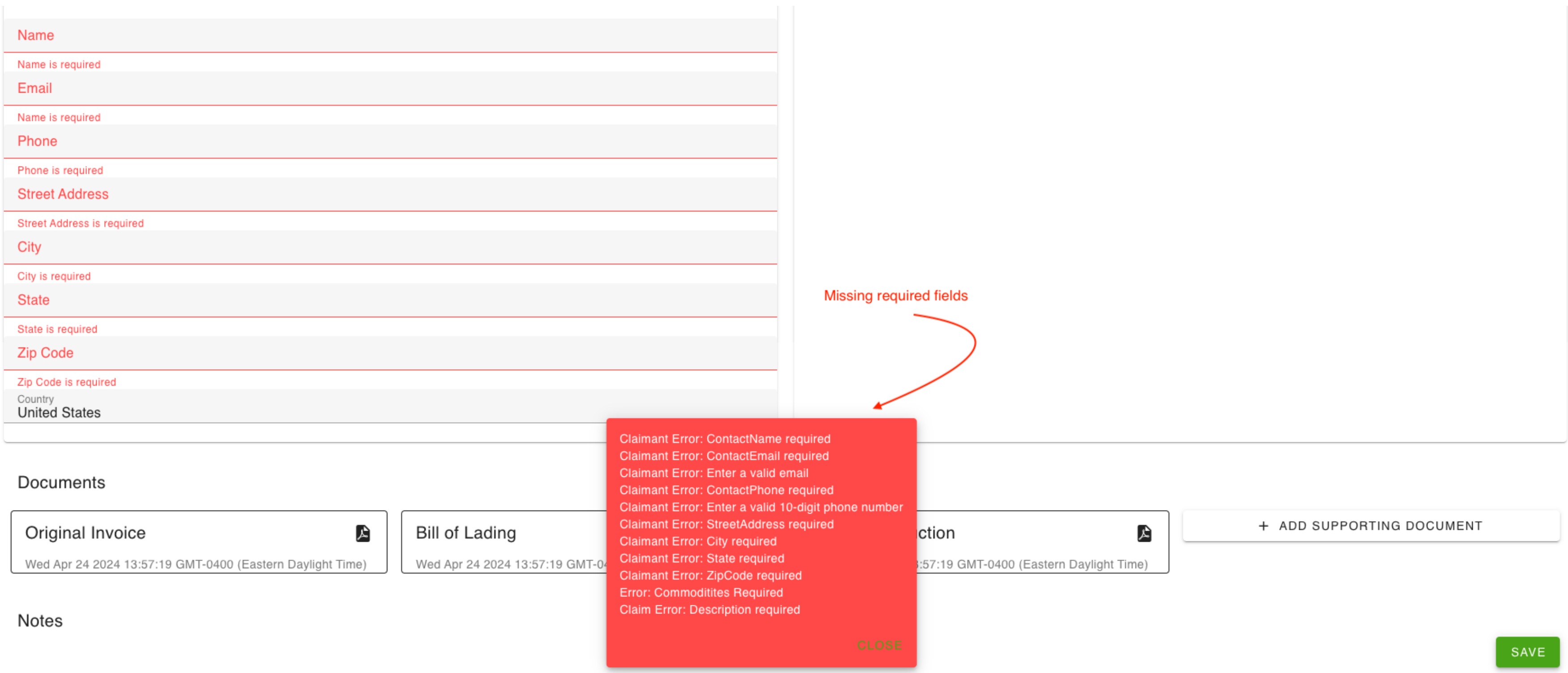




Once required documents have been added the Upload button will become active and the "Add Supporting Documents" button will switch to "Save". Click upload and the files will be added to the claim.



When the save button is clicked and there is required information missing a message will appear noting what information is missing from the claim. Enter the missing information and click save once complete.



Contact Support

In the event you need to contact support regarding any technical issues with the site, please email InSightSupport@fstlogistics.com, or use the Send an Email to Support option in the Action Icons.

For questions regarding inventory or order information, please reach out directly to your CSR.