

Freight Analysis Module

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Freight Analysis Module

1) Accessing Freight Analysis Module

To access the module, first select CalcRate (option 1) from the ARTCMENU screen. Then enter F20 (Shift F8) for the modules, place an 'X' next to "Analysis Module" and press "Enter."

```
10:17:18                               CalcRate                               2/18/14
                                         MAIN MENU

Master File Ma
1. Warehouse Main
2. Carrier Mainte
3. Accessorial Fe
4. Transit Times
5. Mileage Databa
6. Canadian Tax M
7. Equalization -
8. System Control

Rate Maintenanc
10. TruckLoad Rat
11. LTL Tariff Ma
12. Parcel Rate Maintenance ->
13. Air Rate Maintenance <CALC20R>

Module Name
=====
- Manual Entry          * NOT INSTALLED *   <CALC17R>
X Analysis Module      4.0.66             <CALC18R>
- Reporting            * NOT INSTALLED *   <CALC132R>
- Enhanced EDI        * NOT INSTALLED *
- Truck Load Bid     * NOT INSTALLED *
- LTL Bid             * NOT INSTALLED *
- Export Documentation * NOT INSTALLED *
- Preconsolidator    * NOT INSTALLED *
Bottom               <CALC28R>

F12=Exit Use -x- to select

36. Parcel Posting      <CALC30R>
37. EDI Posting ->     <CALC33R>
38. B/L History File   <CALC81R>
                       <CALC85R>

Selection ==> _____ 99. Return   F20=Modules   F21=Command Entry
MÁ a                               09/025
```

Freight Analysis Module

2) Freight Analyzer – Overview

AR Traffic Consultants' Freight Analyzer will help you review your freight and determine if you are using the most cost-effective means of shipping. By offering five separate reports, you have the ability to explore multiple facets of your shipping patterns.

Routing Opportunity Report – Rerates freight with available carriers from origin warehouse to determine if other carrier(s) offered lower rates.

Rate Analysis Report – Rerates freight with new parameters, eg tariff, tariff date, discount, FAK, etc. to determine the effect the change(s) would have on freight spend.

Warehouse Relocation Report – Part of the Rate Analysis Report, this rerates freight from a new warehouse location to determine the effect of a new warehouse on freight spend..

Warehouse Opportunity Report – Rerates freight with available warehouses to determine if rates were lower from another warehouse.

Compliance Report - Reviews freight to determine proportion of shipments shipped via preferred vs non-preferred carrier.

Freight Analysis Module

3) Sample Selection (All Reports)

From the Main menu select option 2,3,4 or 5 to start the desired evaluation.

```
11:26:00                               CalcRept                               1/16/15
                                     MAIN MENU
                                     Select one of the following:
1. Preferences/Default Printer          <REPT01E>
2. Submit Routing Opportunity           <REPT02E - 1>
3. Submit Rate Analysis                 <REPT02E - 2>
4. Submit Warehouse Opportunity         <REPT02E - 3>
5. Submit Compliance Report             <REPT02E - 4>
6. Display Report Status                <REPT03R>
                                       <REPT17R>

Selection ==> _
                                     99 Return                               F21=Command Entry
MA a                                     24/017
```

The sample selection screen allows you to select the freight that you want to present to the carriers. You can include all of your freight or just a part of it (single or several warehouses, etc). Freight can be pulled from the history and/or accrual files by selecting them with an 'X'. The system defaults the date range to January 1 of the current year to the current date, but you can select any range you prefer.

Mode, terms and direction (inbound and/or outbound) are also selected with an 'X'.

Additional **Source Filter Options** include:

Warehouse, Carrier, State, ZIP, Carrier

Freight Analysis Module

```
11:18:31                               CalcRept                               2/18/14
REPT02E                               ROUTING OPPORTUNITY - SAMPLE SELECTION
Data Source & Date Range: Select (X) one or more:
  Accrual  History                                Printer PRT09
  Dates:Start 2014/01/01 End 2014/02/18
Mode/Terms/Direction - Select(X) One or More:
  Mode - Air  LTL  Truckload  Parcel 
  Terms - Prepay  Prepay/Add  Collect  3P 
  Direction - Inbound  Outbound 
Source Filter Options - Single(S) Multi(M) All(A):
  Warehouse 
  Carrier 
  State 
  ZIP 
  Customer 
Additions - Select(X) to Include:
  Accessorials  Fuel Surcharge  Multistop  Indirect 
Optional Ranges:
  Weight - Low _____ High _____
  Price - Low _____ High _____

-----
F1=Help  F3=Exit  F4=Prompt
M@a a 05/011
```

Selecting an 'A' for each of the options will include all of the respective category. Placing an 'S' next to the option will reveal an entry position which must be completed before the program will proceed. If 'M' is selected for a category, a selection screen will appear. Up to 5 warehouses, carriers and customers or up to 6 states or ZIP codes can be selected for each study.

The **Additions** section allows the user to include the charges for accessorials and the fuel surcharge in the analysis. Further, multistop and indirect shipments can be included as well. The default is to exclude these options

The **Optional Ranges** section allows the user to provide shipment weight and shipment price ranges for the analysis. If nothing is entered here, all shipments will be included, irrespective of weight or cost.

```
11:21:23                               CalcRept                               2/19/14
REPT02E                               ROUTING OPPORTUNITY - SAMPLE SELECTION
Data Source & Date Range: Select (X) one or more:
  Accrual  History                                Printer PRT09
  Dates:Start 2014/01/01 End 2014/02/19
Mode/Terms/Direction - Select(X) One or More:
  Mode - Air  LTL  Truckload  Parcel 
  Terms - Prepay  Prepay/Add  Collect  3P 
  Direction - Inbound  Outbound 
Source Filter Options - Single(S) Multi(M) All(A):
  Warehouse  Warehouse Code            Code Required
  Carrier 
  State 
  ZIP 
  Customer 
Additions - Select(X) to Include:
  Accessorials  Fuel Surcharge  Multistop  Indirect 
Optional Ranges:
  Weight - Low _____ High _____
  Price - Low _____ High _____

-----
F1=Help  F3=Exit  F4=Prompt
M@a a 12/030
```

Freight Analysis Module

If you are unsure of the available warehouses, carriers, etc available, pressing F4 will produce a selection window.

```
Code      Carrier Name
====      =====
_ AACT AAA Cooper Transportat
_ ABFS ABF Freight Systems
_ AIR  AIR
_ AVRP Averitt Pallet
_ AVRT Averitt Motor Express
_ BLLF Bullet Freight Systems
_ BUTN Boutin
_ CELC Celtic International
                                     More...
F12=Exit  Use -x- to select
```

4) Criteria for Results

After Selection Criteria have been entered, a second screen will appear. These are similar for all 5 reports, yet there are also some differences.

Routing Opportunity Report

```
11:53:12                               CalcRept                               2/18/14
REPT02E                                ROUTING OPPORTUNITY

CRITERIA FOR RESULTS:
Exclusions - Select(X) all that apply:
Savings less than ($)                _____
Savings less than (%)                _____
Fuel Surcharge                       _____
Indirect Shipments                   _____
Mode      Air  _  LTL  _  TL  _  Parcel  _
Carriers:
with transit exceeding (days)       _____
with transit exceeding rated         _____
without transit times                 _____

Other Factors - Select(X) to include:
Match modes                          X
Market lane provisions                _
Tag routing preferences               X

-----
F1=Help  F3=Exit
MA a                                           07/035
```

The **Exclusions** section allows the user to exclude certain results. Small savings can be excluded either by absolute dollar amount or a percentage of the savings. Fuel surcharge should be excluded if it was not included on the Sample Selection page to provide a fair comparison. Irrespective of the initial carrier, Indirect Shipments can be excluded from the results. One or several modes can be excluded from the results as well. Note that all modes cannot be excluded.

Freight Analysis Module

Carriers can be excluded based upon transit times. The first option provides for exclusion based upon an absolute limit entered in days. The second option provides for exclusion of carriers with a transit time greater than that of the original carrier, whereas the third option excludes carriers without published transit times in the system.

Three **Other Factors** include **Match Modes** which limits carriers to the same mode as the original shipment. **Market Lane Provisions** will exclude carriers set up in the market lane provision sections of CalcRate. **Tag Routing Preferences** will flag each primary or secondary carrier.

Rate Analysis Report

The first entry screen of the Rate Analysis Report differs from the Routing Opportunity Report only in the last line which provides for selection of **Actual vs Billable** rates. When Actual is selected, the rated values will be presented in the report.. Conversely, when Billable is selected, the adjusted rates will be presented.

```
15:34:53                               CalcRept                               2/18/14
REPT02E                                RATE ANALYSIS - SAMPLE SELECTION
Data Source & Date Range: Select (X) one or more:
  Accrual _ History _                               Printer PRT09_____
Dates:Start 2014/01/01 End 2014/02/18
Mode/Terms/Direction - Select(X) One or More:
  Mode - Air _ LTL _ Truckload _ Parcel _
  Terms - Prepay _ Prepay/Add _ Collect _ 3P _
  Direction - Inbound _ Outbound _
Source Filter Options - Single(S) Multi(M) All(A):
  Warehouse _
  Carrier _
  State _
  ZIP _
  Customer _
Additions - Select(X) to Include:
  Accessorials _ Fuel Surcharge _ Multistop _ Indirect X
Optional Ranges:
  Weight - Low _____ High _____
  Price - Low _____ High _____
Rates - Select(X) One: Actual _ Billable _
=====
F1=Help F3=Exit F4=Prompt
MA a 05/01
```

The second entry screen of the Rate Analysis Report allows the user to determine the parameters for rerating the freight. The existing freight can be rerated with any combination of a new base rate tariff, tariff date, discount and FAK. This provides the user with the ability to determine the effect of rate changes in advance.

The only required field on this screen is labeled **Carrier** with options for the lowest cost carrier(**L**), same carrier(**S**) and multiple carriers (**M**). Selecting **L** will provide the lowest-cost carrier with the new parameters. Selecting **S** will restrict the results to the actual carrier of record, whereas **M** will provide a window for selection of up to 5 carriers.

Freight Analysis Module

Exclusions and **Other Factors** function the same as in the Routing Opportunity Report (see above). New Warehouse is used for the Warehouse Relocation Study (see below)

```

15:44:04                               CalcRept                               021814
REPT02E                               RATE ANALYSIS

Rate Using:
Tariff   ___   Tariff Date  _____
Discount _____   FAK   _____

Criteria for Results:
Carrier - Least Cost(L) Same(S) Multi(M)  _
As Of Date 2014/02/18
Exclusions - Select(X) all that apply:
Fuel Surcharge          -
Carriers:
  with transit exceeding (days)  ___
  with transit exceeding rated    -
  without transit times           -
Other Factors - Select(X) to include:
Market lane provisions         -
Tag routing preferences        -
New Warehouse                  _____

-----
F1=Help  F3=Exit  F4=Prompt
MA a                                           06/012
  
```

Warehouse Relocation Report

The Rate Analysis Report is used for this function. A new warehouse must first be set up in the Warehouse Maintenance option (Option 1) of CalcRate. Freight will then be rated as if it originated from the new ZIP code. Combining this with the **L**, **S** or **M** options described above makes this a powerful tool in determining the economic impact of a new warehouse location.

```

11:04:43                               CalcRate                               2/19/14
                               MAIN MENU

Master File Maintenance                Carrier Selection
1. Warehouse Maintenance <CALC01R>    20. Routing Preferences ->
2. Carrier Maintenance ->             21. LTL Rate Inquiry          <CALC17R>
3. Accessorial Fees ->                22. Rate Comparison          <CALC18R>
4. Transit Times ->                  23. Adjusted Comparison      <CALC132R>
5. Mileage Databases ->
6. Canadian Tax Maintenance ->
7. Equalization ->
8. System Control ->

Rate Maintenance
10. TruckLoad Rate Maintenance ->
11. LTL Tariff Maintenance
12. Parcel Rate Maintenance ->
13. Air Rate Maintenance <CALC20R>

Billing
30. Billing Maintenance ->
31. Pro Number Assignment ->
32. Payment Tolerance                <CALC28R>
33. Freight Adjustments ->
34. B/L Accrual File                 <CALC30R>
35. B/L Posting                       <CALC33R>
36. Parcel Posting                    <CALC81R>
37. EDI Posting ->
38. B/L History File                 <CALC85R>

Selection ==>  _
99. Return   F20=Modules  F21=Command Entry
MA a                                           24/017
  
```


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Warehouse Opportunity Report

The first entry screen is identical to that of the Routing Opportunity Report (see above). The second entry screen differs in only two aspects. The options for **Warehouse** under **Comparison** allows the user to compare the index warehouse against one, several or all warehouses. The **Source Warehouse Exclusion** eliminates the index warehouse from comparison. This information can be more appropriately distinguished by using the Routing Opportunity Report.

```
16:09:15                               CalcRept                               2/18/14
REPT02E                                WAREHOUSE OPPORTUNITY

CRITERIA FOR RESULTS:
Comparison: - Single(S) Multi(M) All(A):
Warehouse _
Exclusions - Select(X) all that apply:
Source Warehouse _
Savings less than ($) _____
Savings less than (%) _____
Fuel Surcharge _
Indirect Shipments _
Mode Air _ LTL _ TL _ Parcel _
Carriers:
with transit exceeding (days) _
with transit exceeding rated _
without transit times _
Other Factors - Select(X) to include:
Match modes _
Market lane provisions _
Tag routing preferences _
-----
F1=Help F3=Exit F4=Prompt
a 07/014
```

Compliance Report

This report consists of a single entry screen. This report will compare the shipments with routing preferences and will yield three results which are shown in summary for all studies:

- Shipments routed in accordance with routing preferences
- Shipments routed not in accordance with routing preferences
- Shipments without routing preferences

By selecting **Compliant** and/or **Noncompliant** shipments the detail information can be provided for both types of shipments. Shipments without routing preferences will not be displayed.

Freight Analysis Module

```

11:17:38                               CalcRept                               2/19/14
REPT02E                                COMPLIANCE - SAMPLE SELECTION
Data Source & Date Range: Select (X) one or more:
  Accrual _ History _                               Printer PRT09
Dates:Start 2014/01/01 End 2014/02/19
Mode/Terms/Direction - Select(X) One or More:
  Mode - Air _ LTL _ Truckload _ Parcel _
  Terms - Prepay _ Prepay/Add _ Collect _ 3P _
  Direction - Inbound _ Outbound _
Source Filter Options - Single(S) Multi(M) All(A):
  Warehouse _
  Carrier _
  State _
  ZIP _
  Customer _
Additions - Select(X) to Include:
  Accessorials _ Fuel Surcharge _ Multistop _ Indirect _
  Include Shipments:
  Compliant _ Non-Compliant _

-----
F1=Help  F3=Exit  F4=Prompt
MA a                                           05/011
  
```

5) Display Reports

Selecting option 6 from the CalcRept Main Menu will display the available reports and their status (Submitted, Processing and Complete). This screen can be used to delete reports (option 4) or to access them. Option 5 displays the report on the screen, whereas option 7 sends the report to the printer queue that had been selected previously. Option 8 prepares a spooled file to be emailed as a PDF. AR Traffic uses Keyes Mail ® to email directly from the System I server. This product is available at a discount from us. Alternatively, customization can be performed to use whichever email program your system is using.

```

16:25:57                               CalcRept                               2/18/14
REPT03R                                REPORT STATUS

Type Options, Press Enter.
  4=Delete  5=Display  7=Print  8=Email

Opt  Report Name                Status          Date           Time
--  -
_   Warehouse Opportunit  Complete       2012/01/04  15:06:00
_   Warehouse Opportunit  Complete       2012/01/04  15:19:39
_   Warehouse Opportunit  Complete       2012/01/04  15:37:18
_   Rate Analysis         Complete       2012/01/19  10:02:23
_   Rate Analysis         Complete       2012/01/19  10:04:30
_   Rate Analysis         Complete       2012/01/19  16:22:25
_   Rate Analysis         Complete       2012/01/19  16:41:27
_   Warehouse Relocation  Complete       2012/01/19  17:47:11
_   Routing Opportunity   Complete       2012/01/20  17:37:31
_   Compliance            Complete       2012/04/09   9:45:25
_   Routing Opportunity   Complete       2012/09/21   9:27:54
_   Routing Opportunity   Complete       2012/10/22  16:44:52

More...

-----
F1=Help  F3=Exit  F5=Refresh
MA a                                           09/003
  
```

Freight Analysis Module

6) Preferences

Option 1 from the Main Menu brings you to the preferences screens. The first screen can be used to select your default printer. Additionally, entering the company name and your email address will obviate the need to enter them each time a report is emailed.

Users typically perform the same or similar evaluations repeatedly. In order to automate the selection process as much as possible, each user can set up their own set of preferences for each report (file, direction, terms, etc) minimizing the keystrokes and decreasing the chance for keying errors.

```
17:16:09                               CalcRept                               2/18/14
REPT01E                                PREFERENCE SELECTION

Select Report. Press Enter

1. Routing Opportunity
2. Rate Analysis
3. Warehouse Opportunity
4. Compliance

Report Number      _____
Printer            PRT09_____
Company Name       AR Traffic Consultants_____
Sender Email Address nfisher@artraffic.com_____

=====
F1=Help   F3=Exit
MA a                                           16/023
```