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transtream

PTM014:

How do I run Transtream reports?

This video shows you how to run reports using the Transtream Report App. Complete the activity in this workbook to develop fluency on this topic.

Activity One

Generate different reports using the Reports App.

1. Go to My Apps > Reports App
2. In the top field click on **Report Type**, select from:

   a. **Accounting**
   b. **Carrier**
   c. **Meters**
   d. **PB Shipping API - USPS**

3. In the field below, click on **Report Name**. This changes depending on the Report Type selected above. Refer to Apendix for report names and description.
4. Enter a **Date Range:**

   a. **Start Date**: enter a date
   b. **End Date**: enter a date

5. Click on the **Run** button to generate the report.
6. Review the report details on the display to the right of the sceen.
7. Click on PDF and select the format to down load the report in. Leave as **PDF.**
8. Click on the **Download** button.

> ### Helpful Hints
>
> **Formats**
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> Reports can be downloaded in either PDF, Image, Excel, Word and CSV format. PDF is the format used by default.

Appendix

Accounting Reports - Use additional filters **Carrier** and **Shipper** to generate reports.

Report Name	Description
Account Summary	Shows a breakdown of the amount of items sent and their cost by shipper. This is split by carrier and then cost center
Cost Centre Chargeback	Shows a detailed report of shipments within a certain time frame with additional information on any items using a Cost Center.
Modified SMART Report	Shows postage expenditure per carrier and service.
Simplified Account Summary	Shows a breakdown of the number of shipments by cost center, along with their average and the total cost.
SMART Report	Shows postage expenditure per carrier.
Transactions by Account Summary	Shows a breakdown of the amount of items shipped and their cost by service. These are grouped together by account and shipper.

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Report Name	Description
Transactions by Shipper Summary	Shows a breakdown of the amount of items shipped and their cost by service. These are grouped together by shipper and carrier.

Carriers - Use additional filters **Location** to generate reports.

Report Name	Description
Carrier Activity	Shows the details of the packages and shipments sent by a provided location. The shipments are grouped by ship date and then carrier.
Carrier Performance Analysis Detail	Shows the details of packages and their statuses. They are grouped by carrier and then service.
Carrier Performance Analysis Summary	Shows a high-level view of the performance of each carrier service used in a given time frame. It shows each service, the number of on-time and late deliveries for each, and the total shipping cost.
Delivery Status	Shows a detailed view of each package shipped in a given time frame and displays the delivery special services used.
Delivery Status Summary	Gives a high-level view of the delivery special services used on packages shipped with each carrier in a given time frame. It displays the number of items sent by each service and states how many have a signature available to view. You can either select the user who processed the shipment, or run the report for all users.
Delivery Variance	Displays the difference between package scheduled delivery date and the actual delivery date. Packages are grouped per carrier and a used service.