



Executive Dashboard

Table of Contents

Introduction	3
Status of Current Loads	3
Load Revenue Graph	4
Load Count	5
Gross Margin	6
Open Loads	7
Customers	8
Terminal Leaderboard	9
Sales Rep Leaderboard	10
Daily Revenue Detail	11

Introduction

This guide explains how to navigate the Executive Dashboard, and provides a breakdown of the stats that you see. This dashboard is designed to give you a high level overview on the health of your business. Note, the reports are based on ship date.

If you aren't already presented with the Executive Dashboard at login, you can navigate to it by going to Reports>Sales Reports>Executive Dashboard.

Status of Current Loads

The first thing you'll probably notice on this dashboard is the status of loads in your system. This piece shows you how many loads you have in your system right now that have not yet been delivered. You can click on any of these stats to be redirected to the Freight Operations Dashboard. Below is the explanation of statuses:

Pending Assignment: This is the number of available loads currently in your system (i.e. in the Available Loads section of your freight ops dashboard).

Planned: This is the number of planned loads currently in your system (i.e. in the Planned Loads section of your freight ops dashboard).

Moving: This is the number of in transit shipments currently in your system (i.e. in the Dispatched Loads section of your freight ops dashboard).

Escalations: This is the number of in transit loads where someone has escalated an issue, and these loads need attention.

Executive Summary

Here's what's going on at your business right now



4 Loads
Pending assignment



25 Planned
Shipments covered



84 Moving
Shipments in-route



14 Escalations
Dispatch needs attention

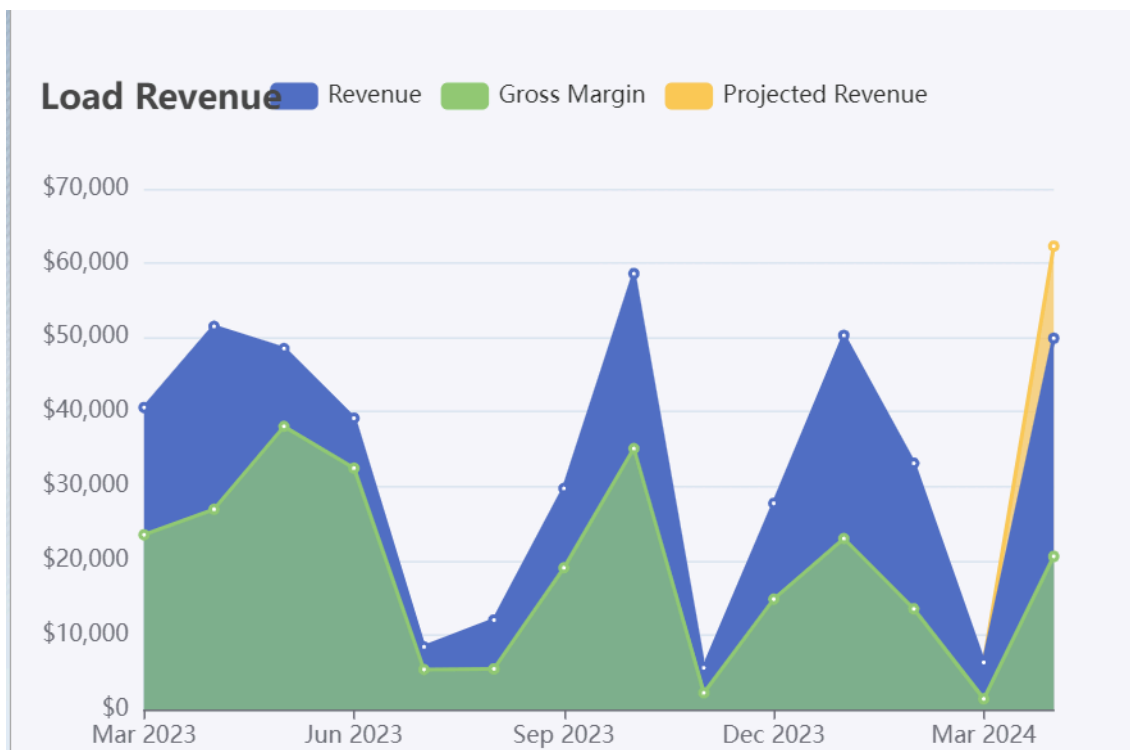
Load Revenue Graph

The next piece of the dashboard we'll review is the Load Revenue chart, which shows revenue, gross margin, and projected revenue. The timeline of the graph shows the year-over-year stats. If you roll your mouse over the chart, the basic revenue information for that time period/month will display.

Revenue: This statistic represents the total amount billed.

Gross Margin: This statistic is based on the total amount billed minus the total amount paid out.

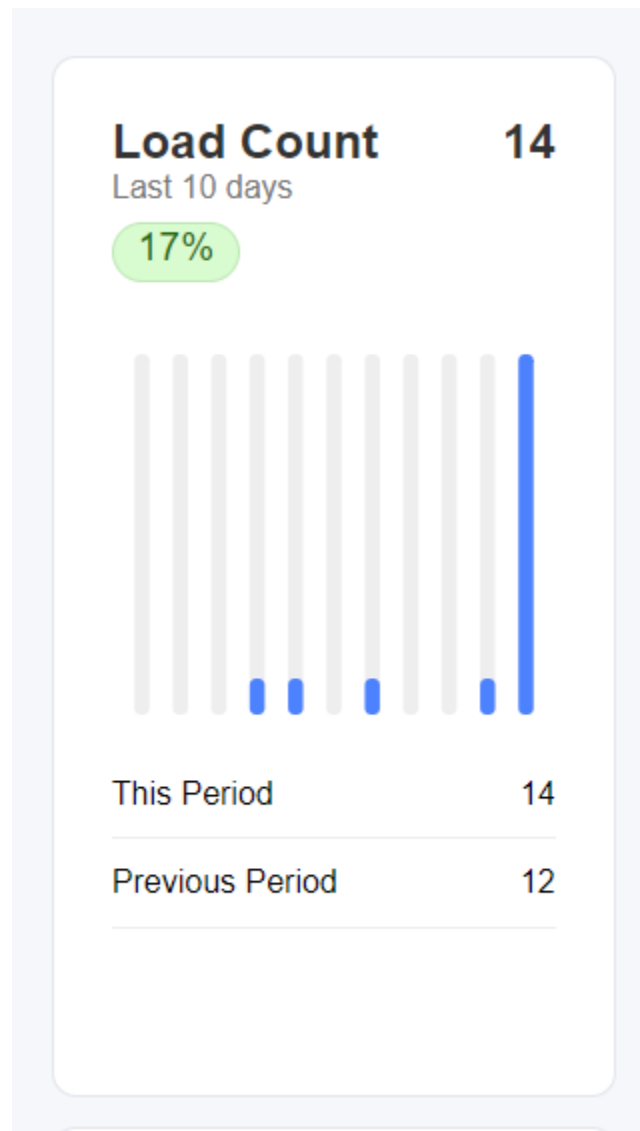
Projected Revenue: This statistic takes into account the last 90 days of load trends, and measures it against the current month. Based on recent activity, the system tries to project the monthly revenue. As the month progresses (after the 20th of the month), the projection calculation changes to include the available loads you have on the board that are scheduled to be picked up before the end of the month.



Load Count

The next stat we'll look at is Load Count. This is showing you the number of loads that have been either planned, dispatched, or delivered over the last 10 days; The only load statuses excluded from this statistic are Available and Canceled. If you roll your mouse over any of the blue bars, the date and number of loads will display. It also shows how many loads were planned, dispatched, or delivered over the previous 10 days to give you a comparison. You can also see this stat represented as a percentage.

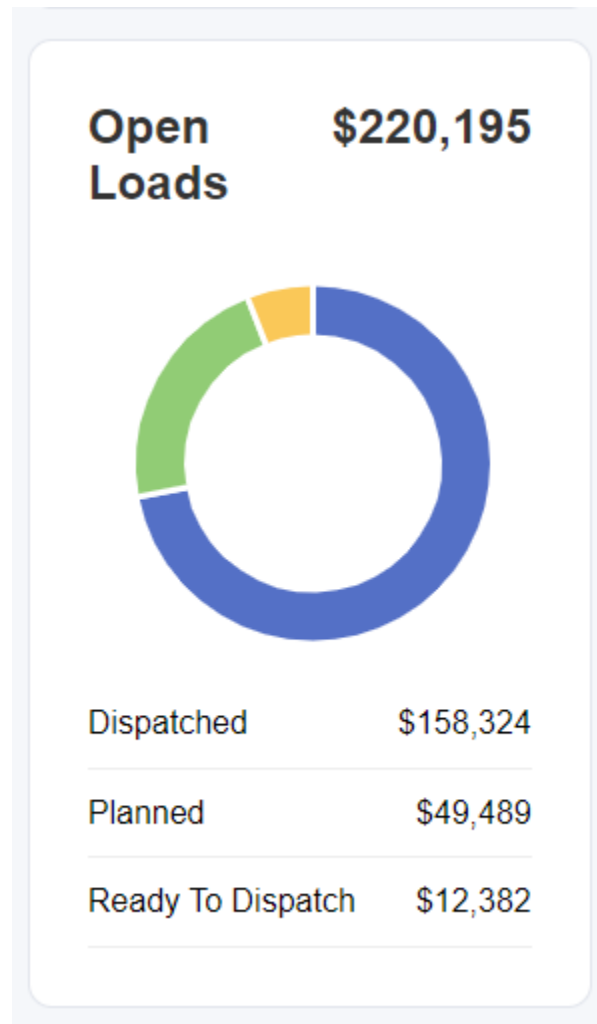
The example screenshot below shows that we're up 2 loads from the previous 10 day period, which is a 17 percent increase from the previous 10 day period.



Open Loads

This statistic includes all loads that have not yet been delivered/closed out yet. In other words, it shows your available, planned, and in transit shipments.

The dollar amount shown represents the total billing amount to the customers on these shipments. In other words, the total amounts shown here include the total billing amount for line haul, fuel surcharge, and any other accessorials that may be on there. The totals round to the nearest dollar.



Customers

This list shows you the customers that account for your last 30 days of revenue, and the amounts shown represent the total billing amounts to these customers. The stats include loads with a status of available, planned, dispatched, or delivered. The only status excluded is canceled.

The list will show up to 10 customers, and it's displayed in descending order based on total billing amount. The totals round to the nearest dollar.

Customers 4	
Last 30 days revenue	
Thompson Dayton Steel	\$30,382
Ryder	\$14,788
KK Shipping Plus	\$8,522
Steves Produce	\$5,525

Terminal Leaderboard

This list shows your top performing terminals/offices over the last 30 days. In this list you will see the name of the terminal/office as well as the revenue amount.

The list will show up to 10 results, and is listed in descending order based on the revenue amount. The totals round to the nearest dollar.

Terminal Leaderboard Last 30 days revenue	
ABC - ABC Freight	\$41,209
AZ - Arizona Office	\$7,237
JF - Jericho Freight	\$5,525
KK - Kenneth Kloeppel	\$3,246
5101 - McDermid Transportation	\$2,000

Sales Rep Leaderboard

This board displays the top sales reps in the last 30 days. The “Sales Rep” is determined by the user that is assigned as the sales representative on a customer record. The total amounts shown here represent the total billing amount on the loads.

The stats include available, planned, dispatched, and delivered loads. Canceled loads are excluded.

The list will show up to 10 results, and is listed in descending order based on the revenue amount. The totals round to the nearest dollar.

Sales Rep Leaderboard	
Last 30 days revenue	
Kenneth Kloeppel	\$8,522
Kelly Frederick	\$3,150

Daily Revenue Detail

At the bottom of this dashboard you will find a grid that displays the daily revenue broken down in detail.

Below is an example of that grid. The values displayed are the average amounts for each day.

Daily Revenue Detail

Pickup Date	Load Count	Miles	Freight	Fuel	Accessorial	Total Revenue	Total Payout	Gross Margin	Margin	RPM	Revenue Per Load	Miles Per Load
Apr 06, 2024	0	0	\$0	\$0	\$0	\$0	\$0	\$0	0%	\$0	\$0	0
Apr 07, 2024	3	2,364	\$6,000	\$1,087	\$150	\$7,237	\$6,097	\$1,140	16%	\$3.06	\$2,412	788
Apr 08, 2024	0	0	\$0	\$0	\$0	\$0	\$0	\$0	0%	\$0	\$0	0
Apr 09, 2024	1	846	\$1,772	\$474	\$1,000	\$3,246	\$1,323	\$1,922	59%	\$3.84	\$3,246	846
Apr 10, 2024	2	1,085	\$1,925	\$0	\$0	\$1,925	\$1,695	\$230	12%	\$1.77	\$963	543
Apr 11, 2024	5	948	\$5,100	\$72	\$450	\$5,622	\$3,082	\$2,540	45%	\$5.93	\$1,124	190
	28	14,046	\$46,297	\$1,851	\$1,750	\$49,898	\$29,328	\$20,570				

If you have any questions about this dashboard, please contact our support team by emailing support@transportpro.net.