

Spend Analytics Client User Guide

Spend Analytics helps you visualize salary, tax, and expenses for analysis by country, and employee to unlock a clear picture of your invoice amounts, employee information and trends easily.

As a user of Safeguard Global's GEO services, you now have access to this new capability to help your team make better decisions.

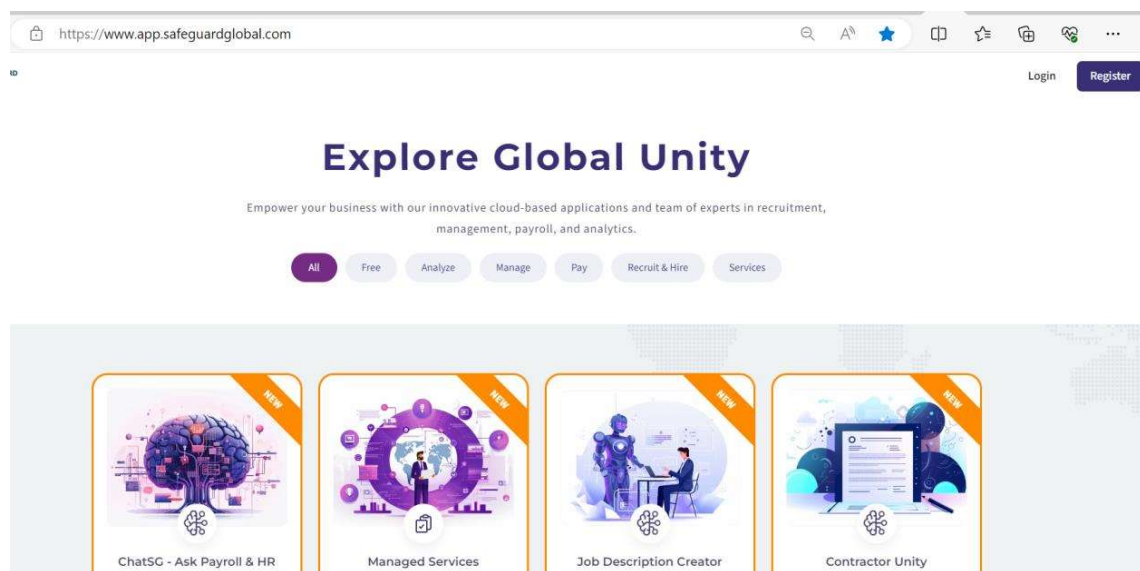
If you do not have access, default view is for demo access. For client specific access, please reach out to your Client Delivery Manager or Customer Support Specialist. Because this tool has your workers' personally identifiable information (PII), authorized individuals need to be the designated and approved.

Let us get started.

Step 1: Navigate to Safeguard's landing page:

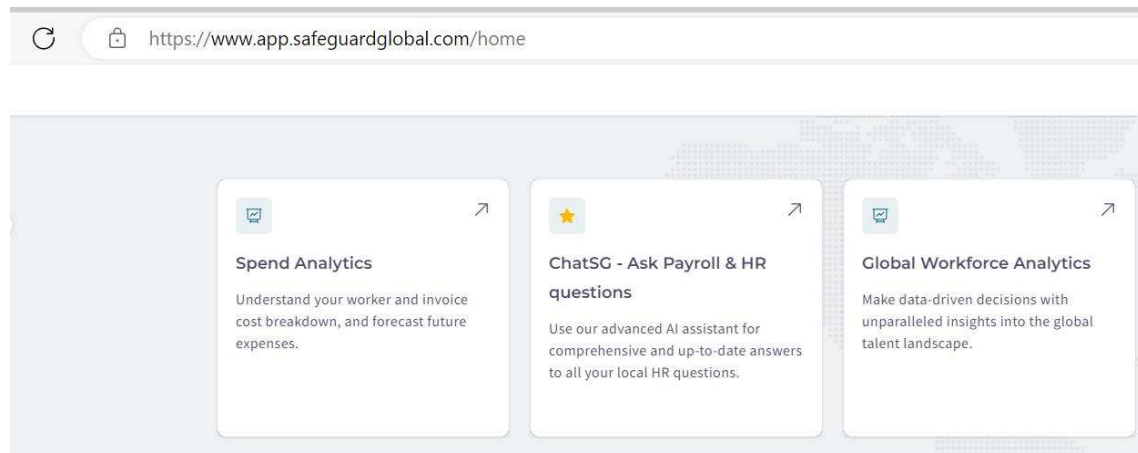
<https://www.app.safeguardglobal.com/home>

Step 2: Log-in or Register – upper right-hand corner - option to reset password if needed.



Step 3: Navigate to Spend Analytics tile – Note, system can take a few minutes to load data.

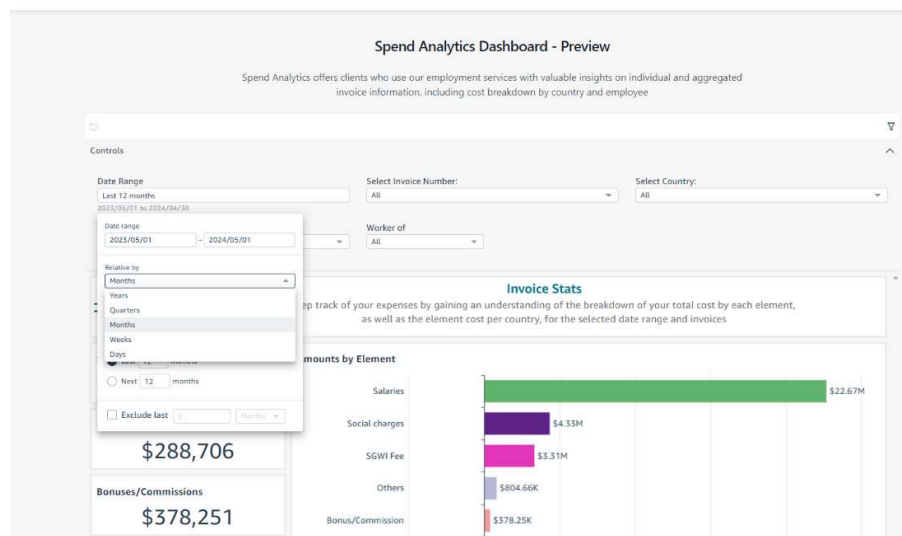
This is the default preview view – demo access. For client specific data please contact your Client Delivery Manager or Client Support Specialist. We will obtain client approval and provide access.



Step 4: Make selections – Filter by date range, Invoice Number, Country, Pay Element, Invoice Type and if needed/ utilized Worker Of category (used for project specific predetermined grouping of like workers).

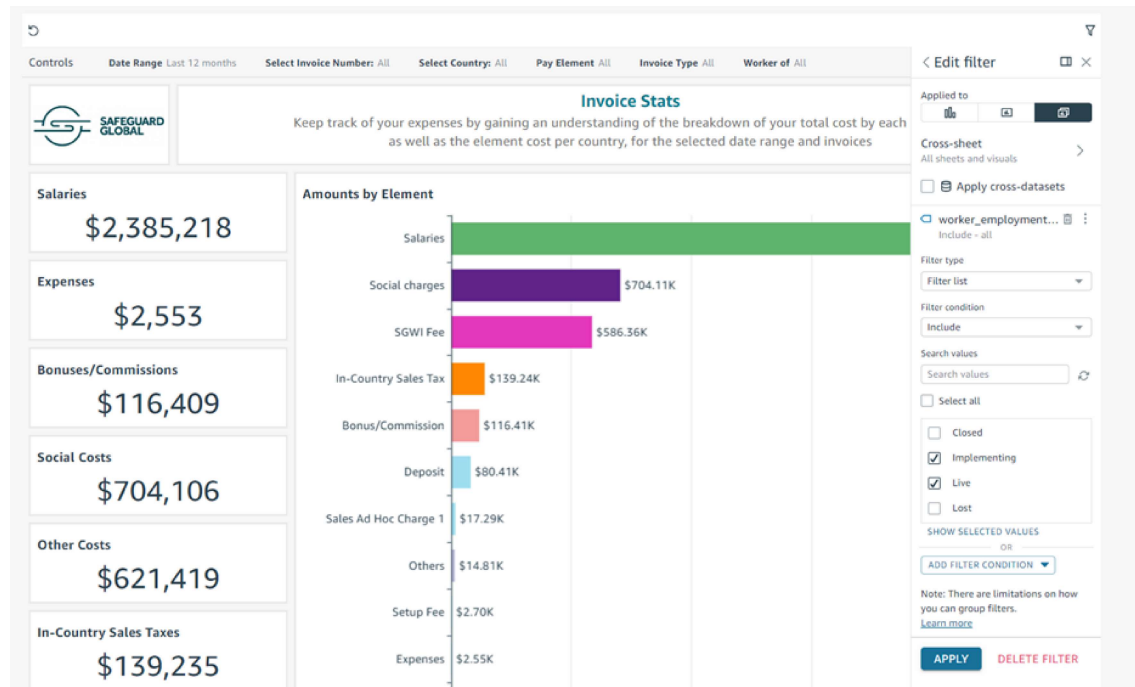
Can view by years, quarters, month options. Note that data extends to 2023 by design to ensure data integrity.

Spend Analytics Dashboard



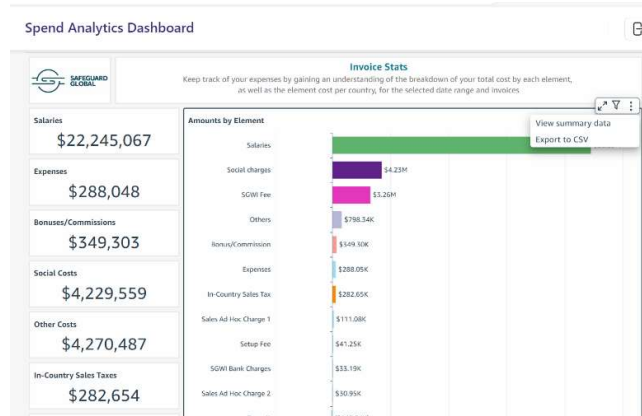
Additional Filters Available:

- Clicking on the filter in graph - will provide the ability to create additional filter criteria
- Click on Add Filter – Scroll to Worker Employment Status as example to only show active or inactive workers (additional filters available)
- Select Criteria and apply cross data-sets or just to the selected graph
- Apply
- Will filter to show only selected worker criteria (Closed, Implementing, Live, and/or Lost)

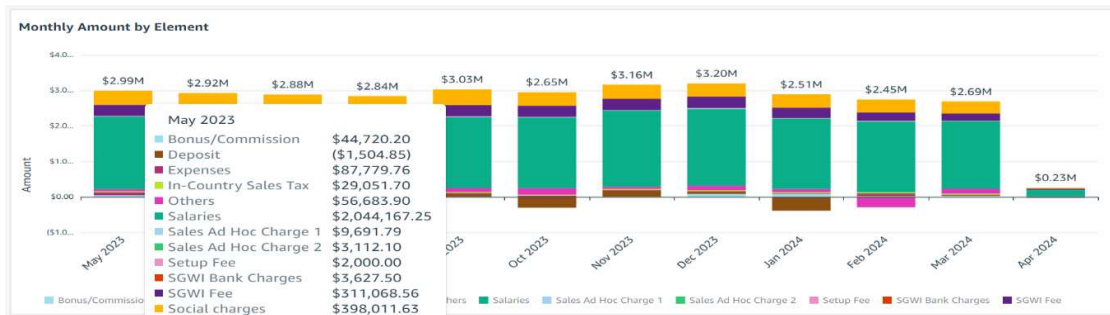
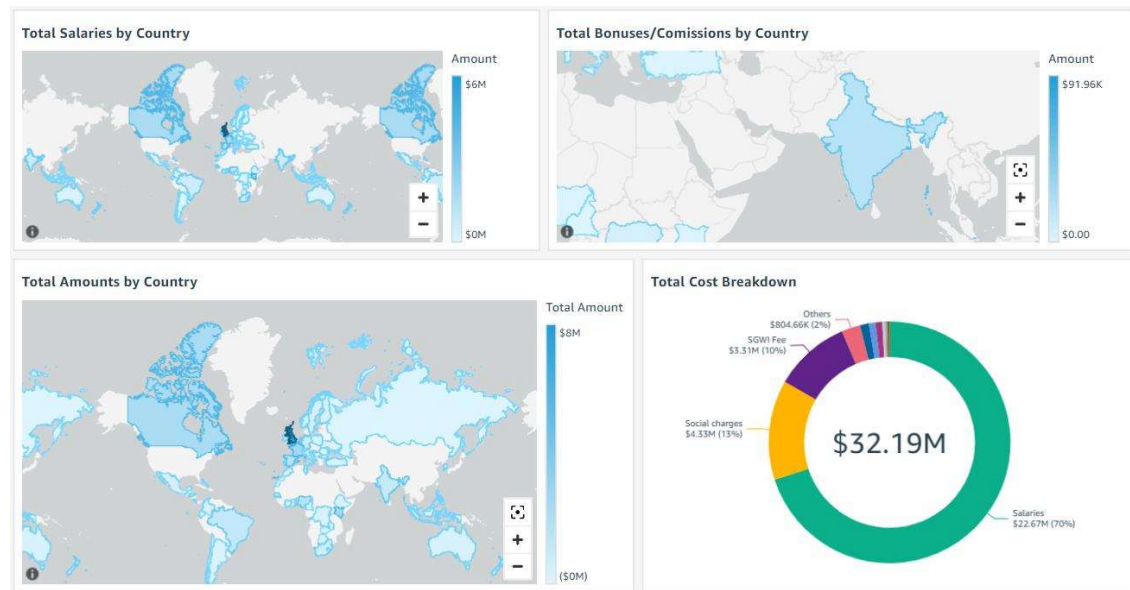


Step 5: Invoice Details - Choice of visual representations – All graphs can be exported as summary data or CSV.

Note that data extends to 2023 by design to ensure data integrity. Deposits and credits may not be fully reflected due to the date restrictions if deposits/credits were issued prior to 2023.



Product Update: Totals from left to right balancing to be addressed in next release.





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Step 6: Specific Invoice Details – exportable to Excel/CSV

Invoice report is very useful when comparing invoices month to month for changes, budgeting, salary details, understanding % of social cost as average for country or by worker. This section contains PII. Demo data shown here.

Invoice Report

Stay organized and on top of your invoices with detailed invoice reporting that provides a clear and concise breakdown of all selected invoices within your chosen date range.

Invoice Report

Invoice Number	Invoice Type	Employee Id	Employee Name	Worker of Account	ICE Name	Purchase Order Num	Billing Contact Email	Date	Social charges	
									Amount	
299538	Payroll Invoice	4407	4407	Demo - 10	GXXXXA	%	Demo - ...	05-11-2023		
				Demo - 3	GXXXXA	%	Demo - ...	05-11-2023		
				Demo - 4	GXXXXA	%	Demo - ...	05-11-2023		
				Demo - 5	GXXXXA	%	Demo - ...	05-11-2023		
				Demo - 7	GXXXXA	%	Demo - ...	05-11-2023		
				Demo - 9	GXXXXA	%	Demo - ...	05-11-2023		
				Demo - 0	GXXXXA	%	Demo - ...	05-11-2023		
		4408	4408	Demo - 2	GXXXXA	%	Demo - ...	05-11-2023		
				Demo - 3	GXXXXA	%	Demo - ...	05-11-2023		
				Demo - 6	GXXXXA	%	Demo - ...	05-11-2023		
				Demo - 10	GXXXXA	%	Demo - ...	05-11-2023		
				Demo - 3	GXXXXA	%	Demo - ...	05-11-2023		
				Demo - 4	GXXXXA	%	Demo - ...	05-11-2023		
				Demo - 5	GXXXXA	%	Demo - ...	05-11-2023		
				Demo - 7	GXXXXA	%	Demo - ...	05-11-2023		
Total									\$707,312.18	

Slide across for details – export to view in CSV or Excel

Invoice Report										Social charges	
Stay organized and on top of your invoices with detailed invoice reporting that provides a clear and concise breakdown of all selected invoices within your chosen date range.										Amount	
Purchase Order Num	Billing Contact Email	Date	Ad Hoc	Salaries	SGWI Fee	SGWI Bank Charges	Others	In-Country Sal...	Expenses	Bonus/Commis...	Total
Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
%	Demo - ...	05-11-2023					\$132.24				\$132.24
%	Demo - ...	05-11-2023			\$1,983.10						\$1,983.10
%	Demo - ...	05-11-2023						\$1,457.92			\$1,457.92
%	Demo - ...	05-11-2023								\$530.47	\$530.47
%	Demo - ...	05-11-2023							\$54.74		\$54.74
%	Demo - ...	05-11-2023	106.15								\$106.15
%	Demo - ...	05-11-2023									\$2,662.41
%	Demo - ...	05-11-2023			\$7,765.09						\$7,765.09
%	Demo - ...	05-11-2023					\$132.24				\$132.24
%	Demo - ...	05-11-2023						\$1,384.35			\$1,384.35
%	Demo - ...	05-11-2023	114.61								\$114.61
%	Demo - ...	05-11-2023									\$2,643.27
%	Demo - ...	05-11-2023								\$577.51	\$577.51
%	Demo - ...	05-11-2023			\$1,884.87						\$1,884.87
Total			\$7.33	\$2,340,599.40	\$567,305.95	\$233.34	\$6,578.22	\$133,980.03	\$2,589.36	\$117,350.11	\$3,891,985.90

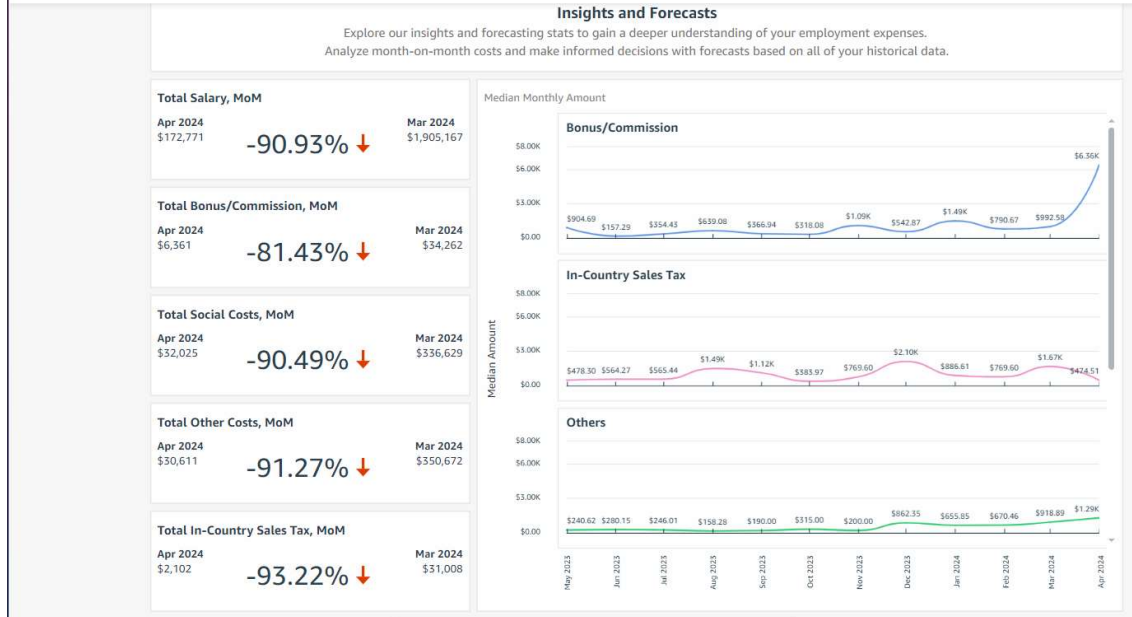


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Step 7: Insights and Forecast – Month over month compare.

Spend Analytics Dashboard

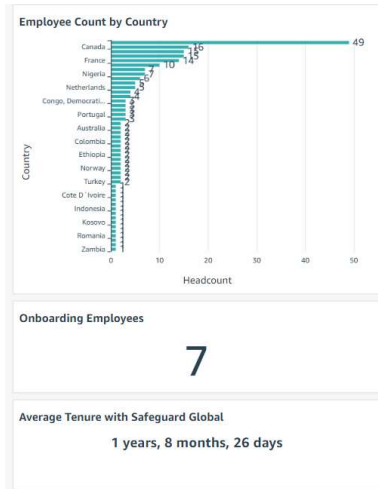




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Step 8: Employee Stats – Visual representation - All graphs can be exported as summary data or CSV. Table sections can be exported to excel or CSV.

Can filter to only show active/inactive workers as needed

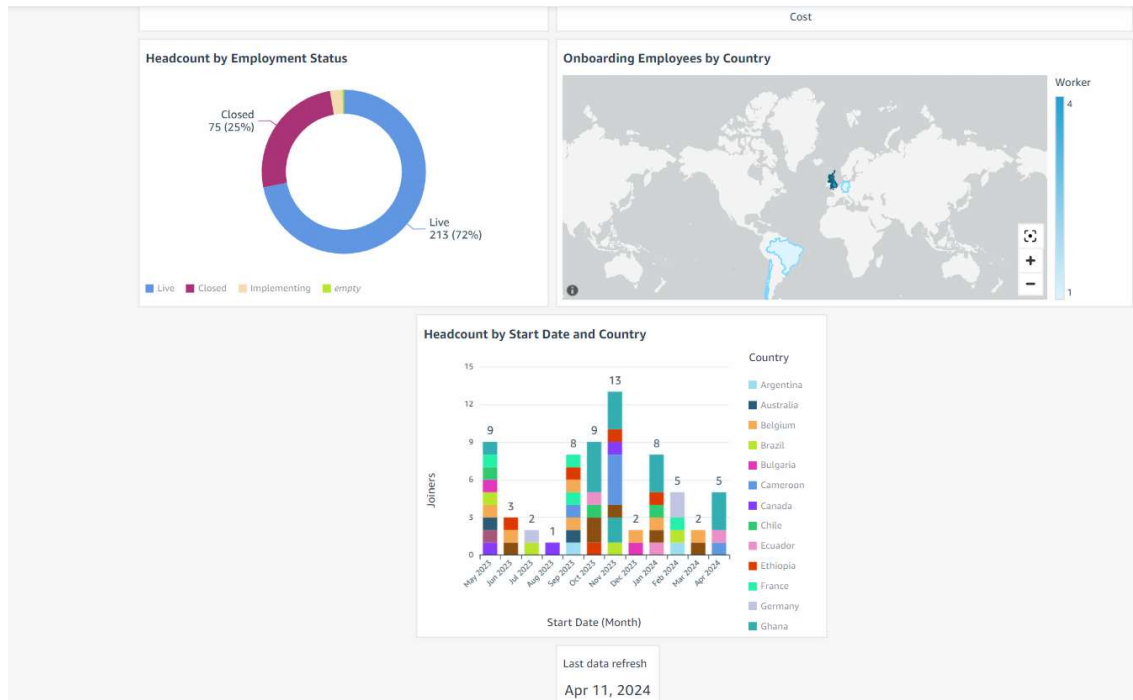


Demo data, names removed, live data has worker names included.



Step 9: Headcount and On-Boarding – Visual representation - All graphs can be exported as summary data or CSV. Table sections can be exported to excel or CSV.

Spend Analytics Dashboard



Step 10: Contact Safeguard Global

Feedback – please share using our feedback form - [Spend Analytics Feedback Form \(office.com\)](#)

Questions on the results or specific invoices – please contact our Global Support Centre – using the Get Help Tile - <https://www.app.safeguardglobal.com/home>