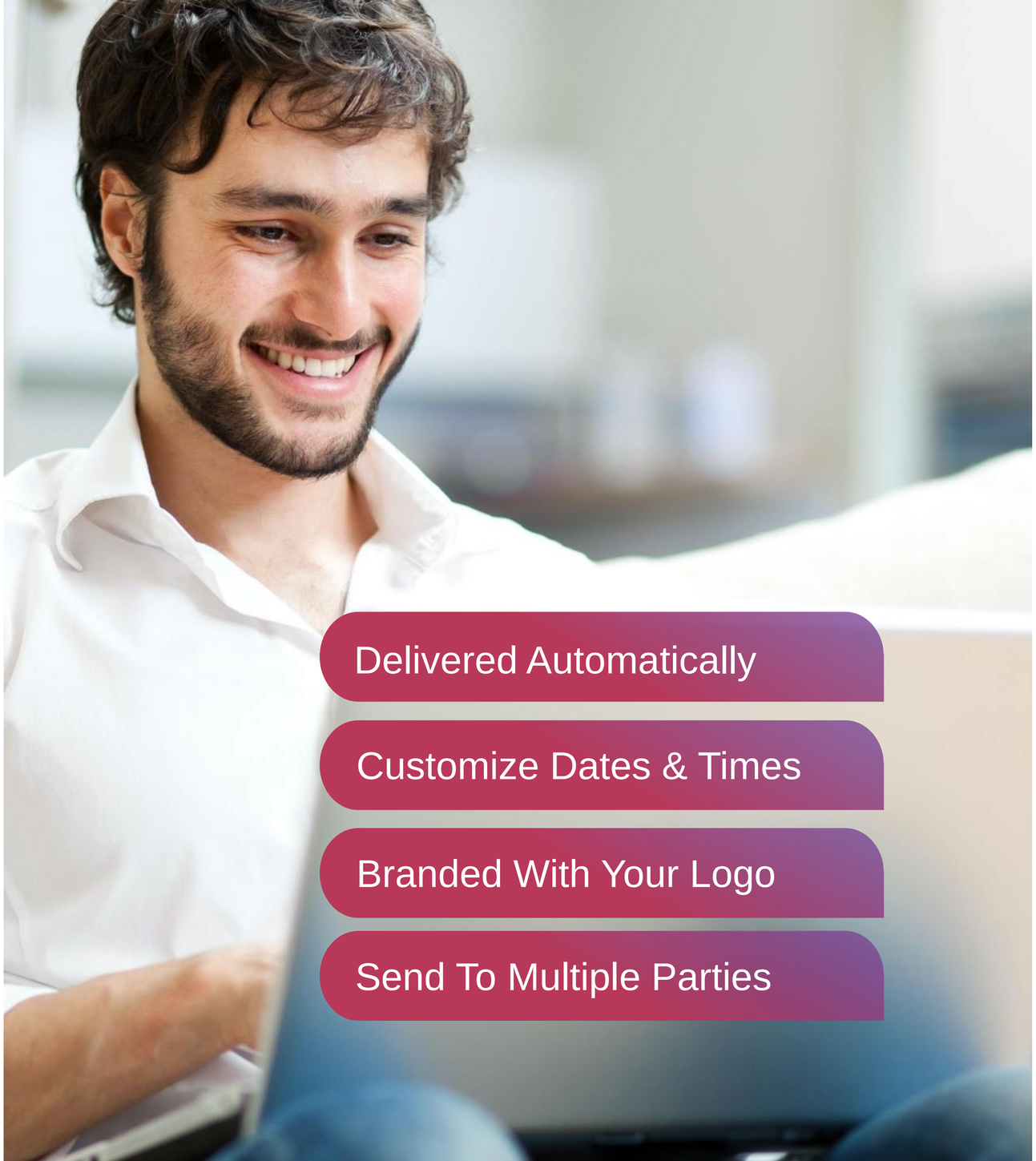
Introduction To Scheduled Reports

SNAILWORKS
Direct Mail Insights & Solutions



Delivered Automatically

Customize Dates & Times

Branded With Your Logo

Send To Multiple Parties

Scheduled Reports

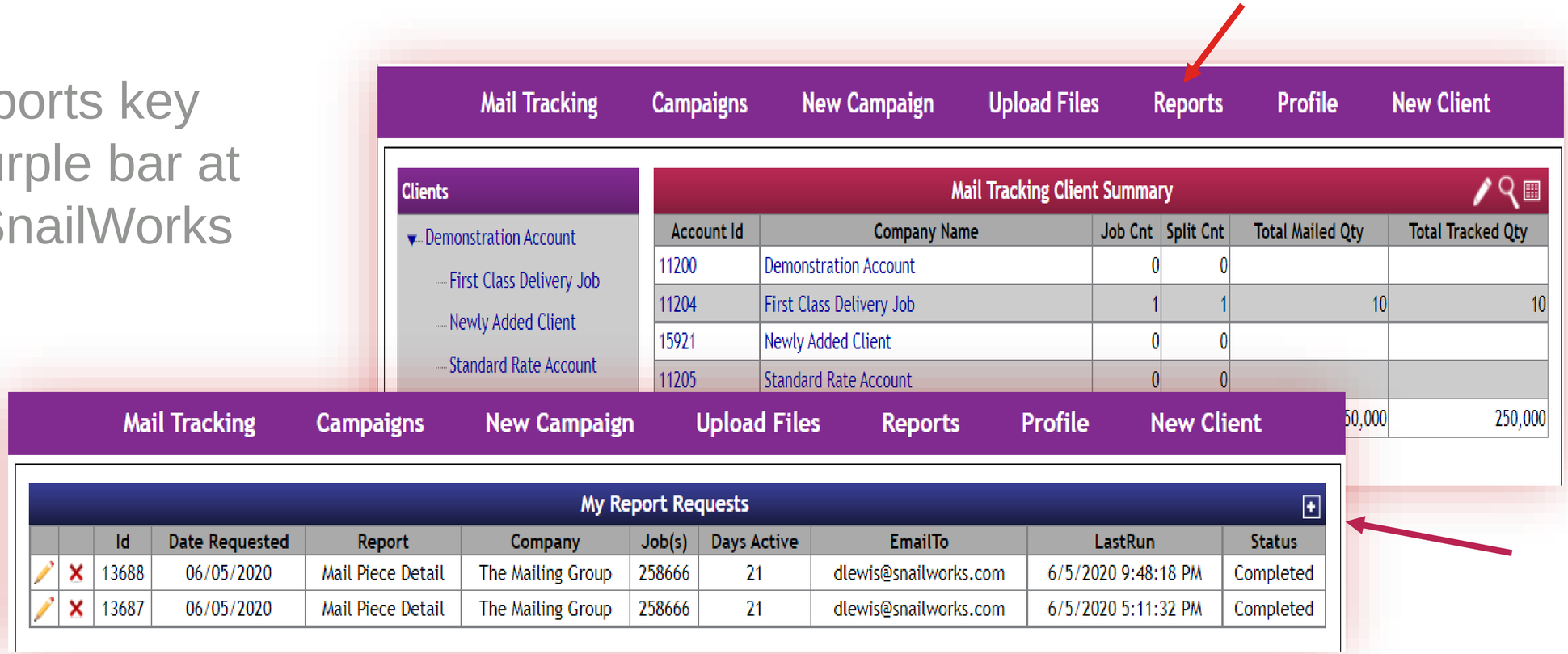
SnailWorks™ allows you to set reports to be sent to yourself, collogues and clients on a schedule you chose. Reports may be scheduled for specific jobs or all jobs in an account – you choose!

Many users choose to schedule reports and push them to their clients rather than giving them login rights.

Introduction To Scheduled Reports

Click on the Reports key located in the purple bar at the top of your SnailWorks dashboard.

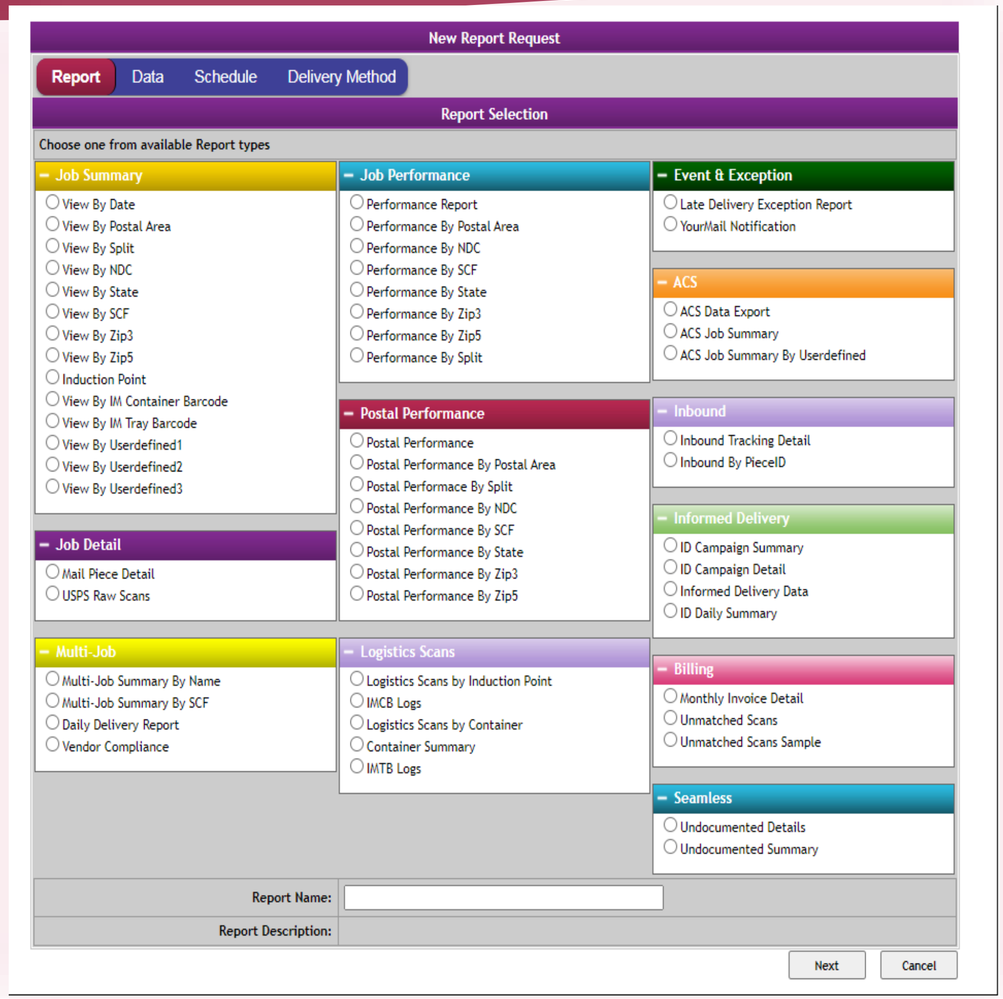
Click on the "+" in the blue bar to access the report building tool..



Introduction To Scheduled Reports

Report types are displayed and grouped by function.

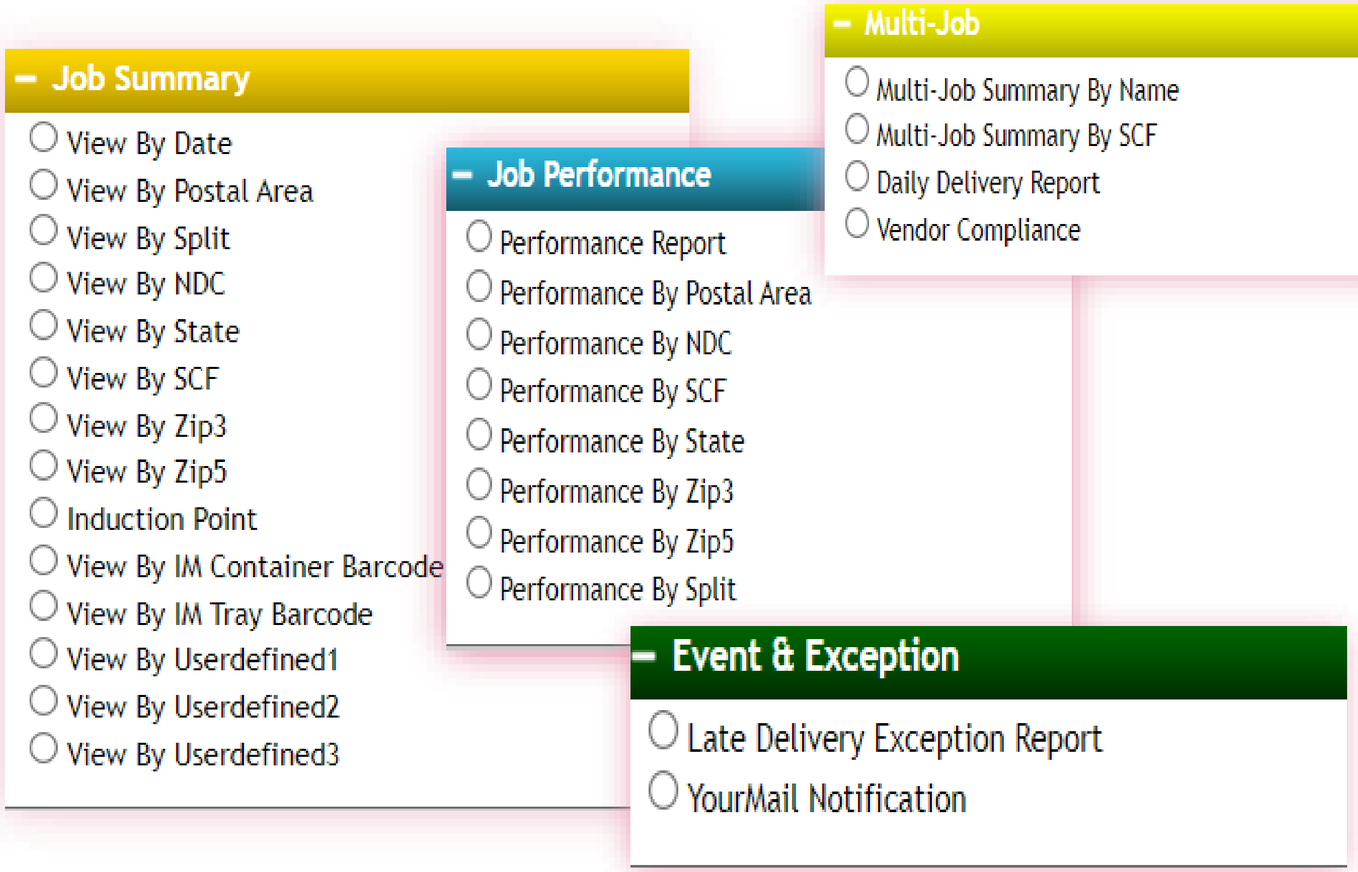
Test both report types and format to find which best meet your needs!



Introduction To Scheduled Reports

Report Types & Categories

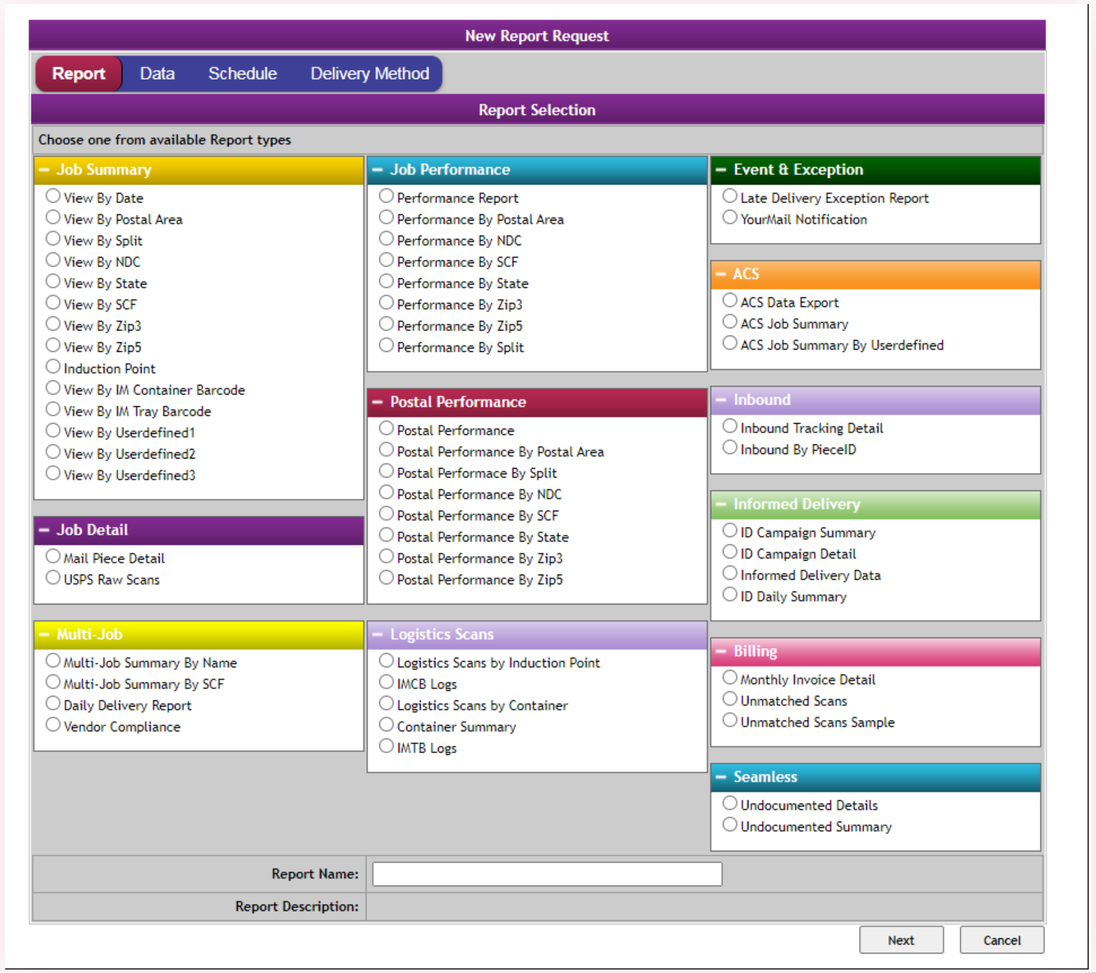
Job Summary
Job Detail
Multi-Job
Job Performance
Postal Performance
Logistics Scans
Event and Exception
ACS
Inbound
Informed Delivery
Billing
Seamless



Scheduling a Daily Delivery Report

Select the report you'd like to schedule, **Name** it and click the **Next** button at the bottom of the screen.

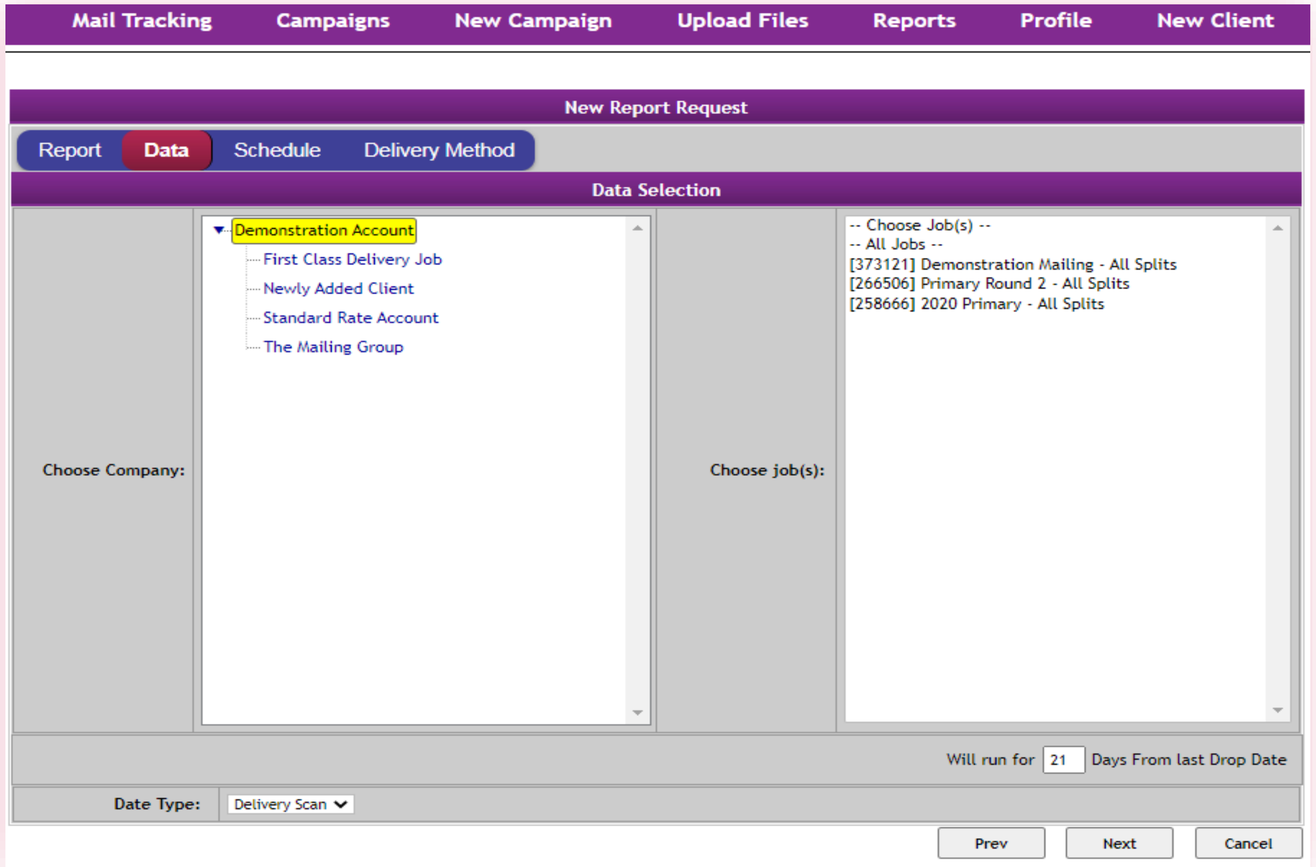
Daily Delivery Reports are an ideal tool for monitoring all your active mailings.



Scheduling a Daily Delivery Report

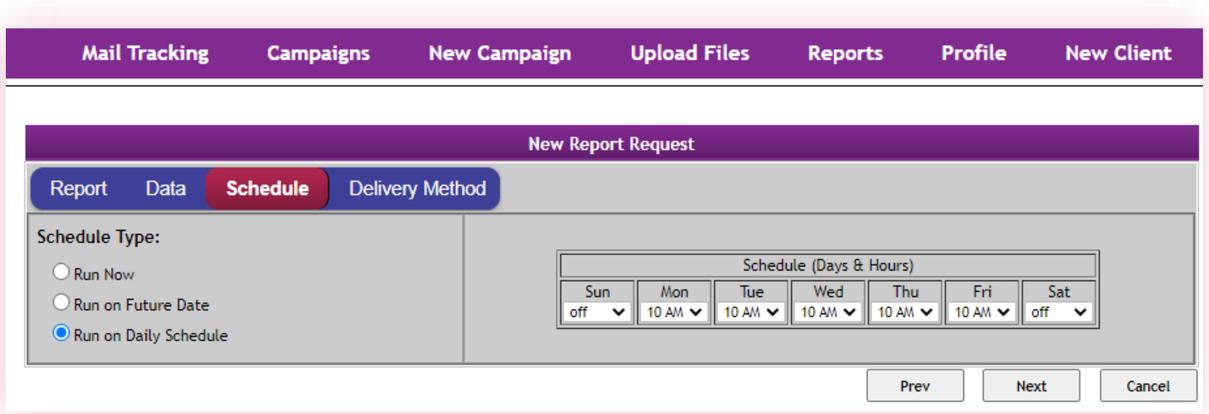
Select the account you'd like scheduled and which jobs are to be included. Click the **Next** button at the bottom of the screen.

You can select which scan types you want your reports based on as well as number of days report should run.



Scheduling a Daily Delivery Report

Select when you'd like to receive your report. Click the **Next** button at the bottom of the screen.

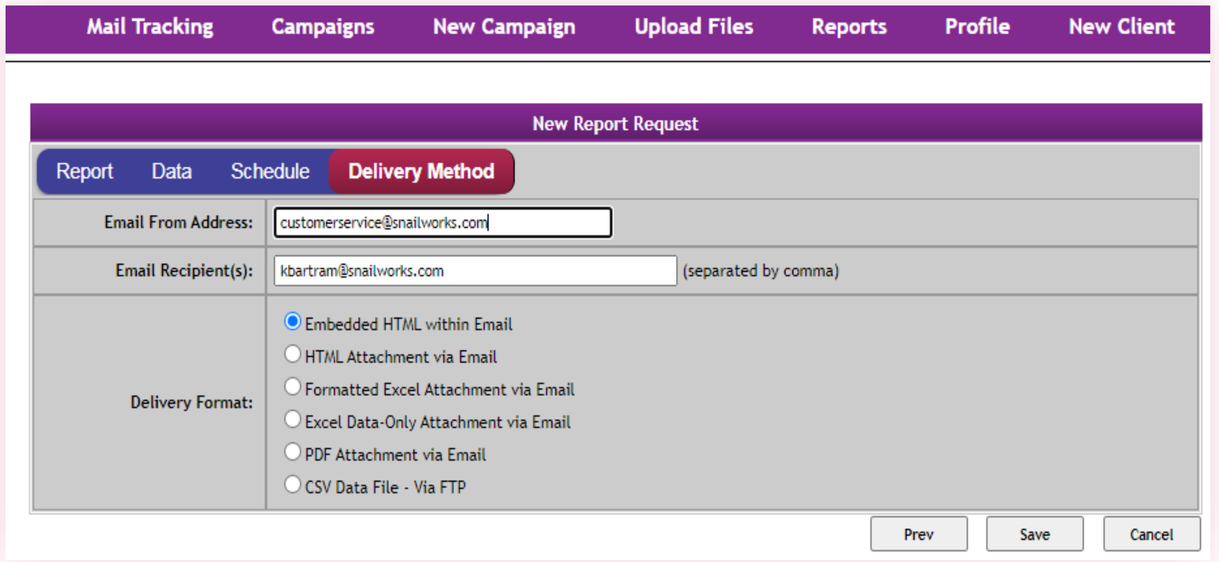


Test your report by selecting Run Now – you can later edit this report and set the schedule.

Scheduling a Daily Delivery Report

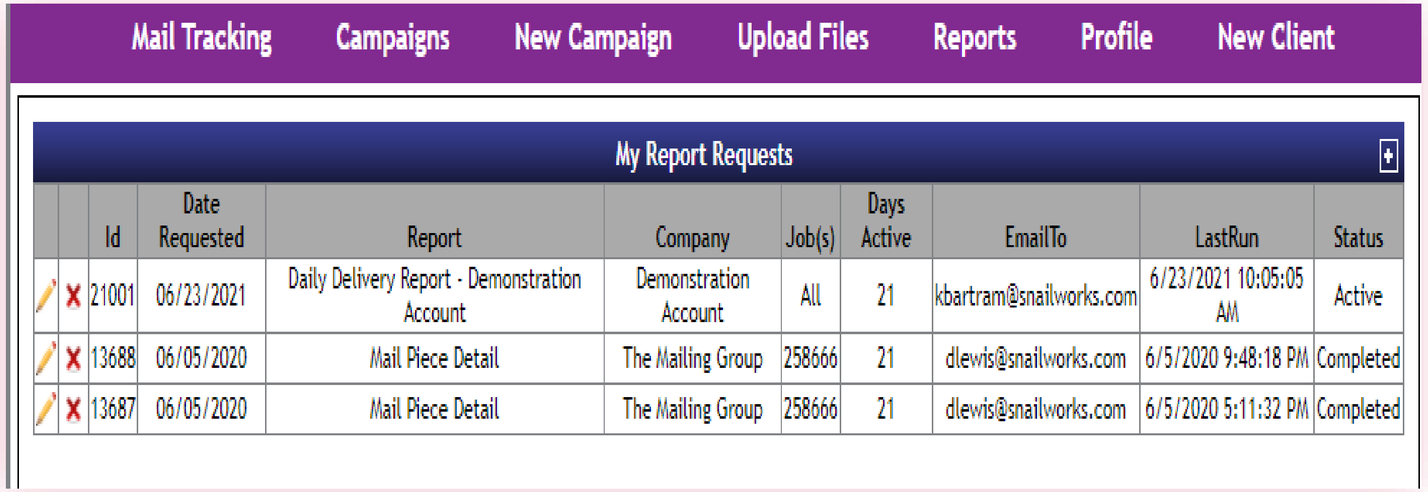
Complete the form with “from” and recipient addresses and **Select** what format you’d like. **Click** Save at the bottom.

To and *From* values default to the email address of the user – if you are sending reports to yourself remember to change the from address to: CustomerService@SnailWorks.com



Scheduling a Daily Delivery Report

View your newly scheduled report on the “reports” tab. You will see parameter details and last run date.



		Id	Date Requested	Report	Company	Job(s)	Days Active	EmailTo	LastRun	Status
	X	21001	06/23/2021	Daily Delivery Report - Demonstration Account	Demonstration Account	All	21	kbartram@snailworks.com	6/23/2021 10:05:05 AM	Active
	X	13688	06/05/2020	Mail Piece Detail	The Mailing Group	258666	21	dlewis@snailworks.com	6/5/2020 9:48:18 PM	Completed
	X	13687	06/05/2020	Mail Piece Detail	The Mailing Group	258666	21	dlewis@snailworks.com	6/5/2020 5:11:32 PM	Completed

Introduction to Scheduled Reports

TRY OUT VARIOUS REPORTS

EDIT REPORT NAMES

PREVIEW YOUR REPORTS

CHANGE FROM ADDRESS

TRY OUT THE VARIOUS REPORTS

Take the different report types and formats for a test drive and see which ones best fit the needs of you and your clients.

EDIT REPORT NAMES

SnailWorks will name your report with the report type name – you will likely want to update that with language specific to you and your clients.

PREVIEW YOUR REPORTS

Ensure the report you are setting up to run on a schedule is what you expect by selecting “Run Now” – review the report and then edit that report to have it run on an on-going basis.

CHANGE FROM ADDRESS

If sending reports to yourself you will want to change the from address from you to CustomerService@SnailWorks.com to avoid the email being blocked by your server’s firewall.

SNAILWORKS

QUESTIONS?

We love to hear from our clients!

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