

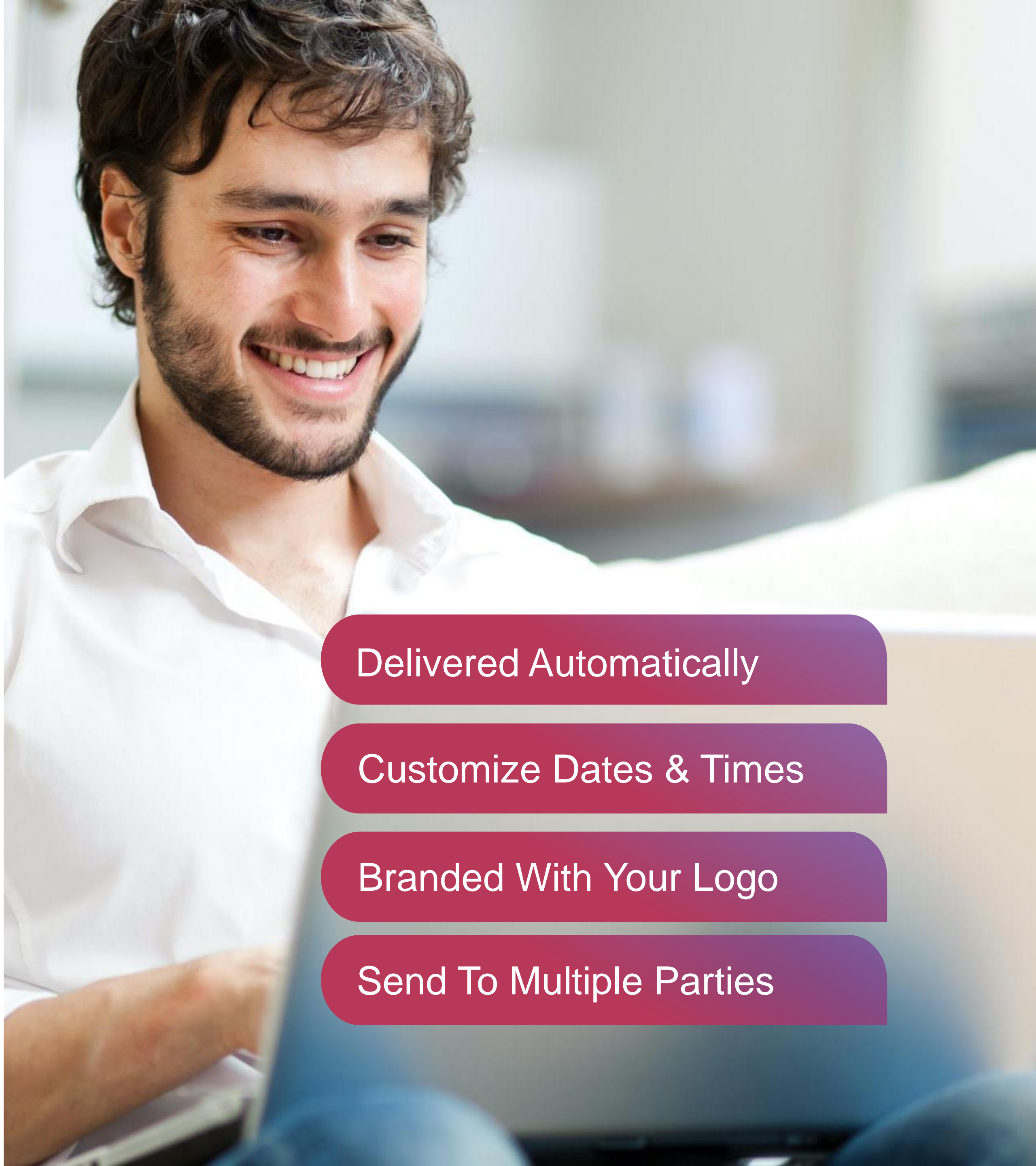


Introduction To Scheduled Reports



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, colleagues and clients on a schedule you chose.

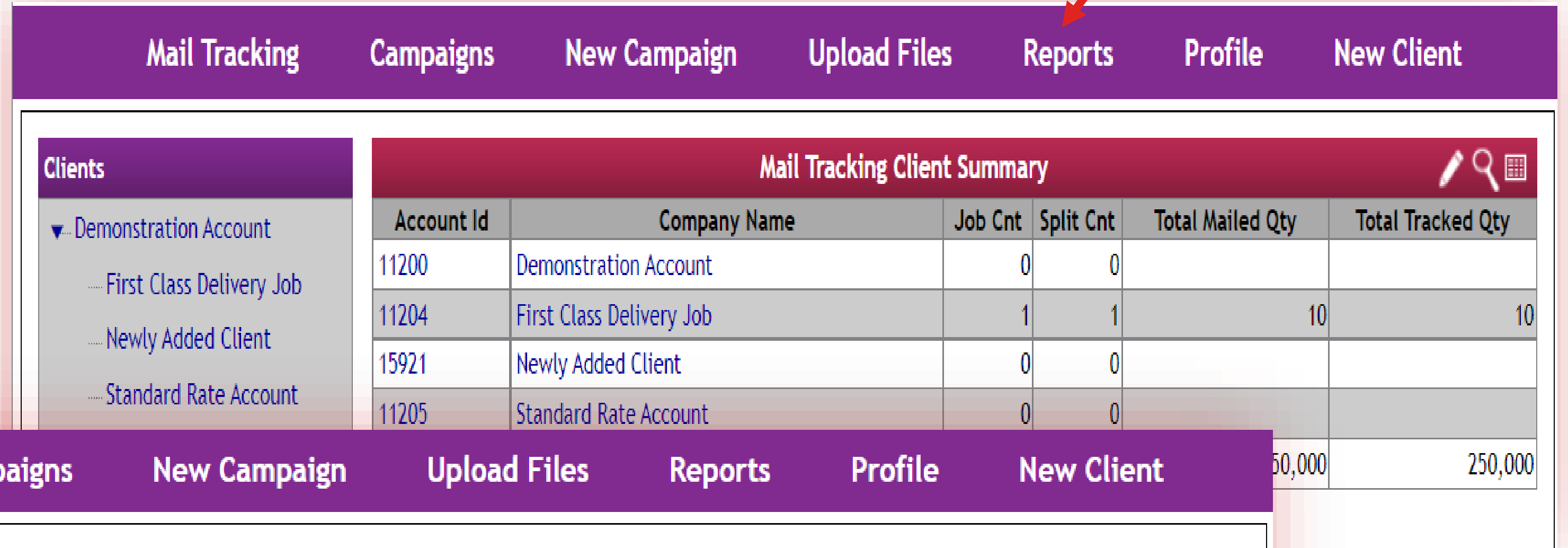
Reports may be scheduled for specific jobs or all jobs in an account – you choose!

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



Introduction To Scheduled Reports

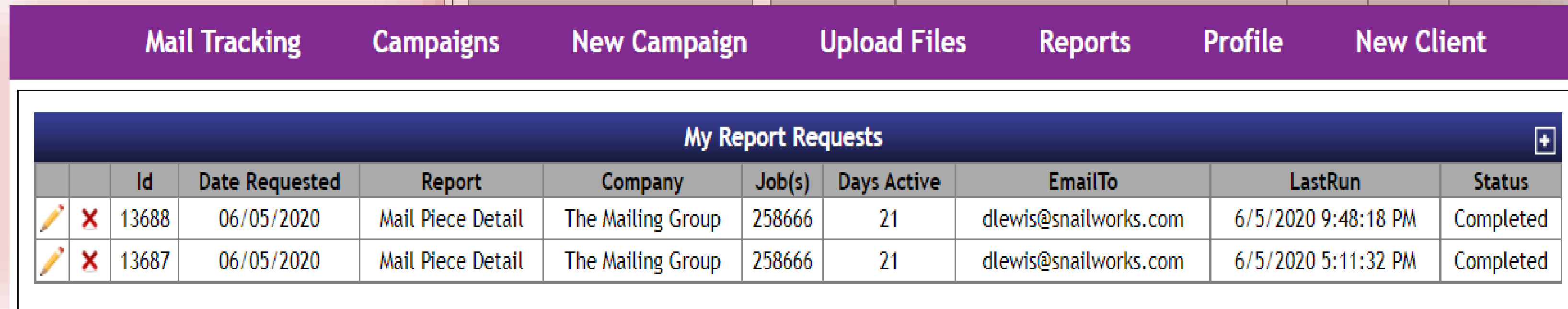
Click on the Reports key located in the purple bar at the top of your SnailWorks dashboard.



The screenshot shows the top navigation bar of the SnailWorks dashboard. The 'Reports' menu item is highlighted in white and has a red arrow pointing to it. The navigation bar includes: Mail Tracking, Campaigns, New Campaign, Upload Files, Reports, Profile, and New Client. Below the navigation bar, there is a sidebar on the left with a 'Clients' section containing: Demonstration Account, First Class Delivery Job, Newly Added Client, and Standard Rate Account. The main content area displays a 'Mail Tracking Client Summary' table with columns: Account Id, Company Name, Job Cnt, Split Cnt, Total Mailed Qty, and Total Tracked Qty. The table contains four rows of data.

Account Id	Company Name	Job Cnt	Split Cnt	Total Mailed Qty	Total Tracked Qty
11200	Demonstration Account	0	0		
11204	First Class Delivery Job	1	1	10	10
15921	Newly Added Client	0	0		
11205	Standard Rate Account	0	0		

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



The screenshot shows the 'My Report Requests' table in the SnailWorks dashboard. The table has a blue header with a '+' icon in the top right corner, which is highlighted by a red arrow. The table columns are: Id, Date Requested, Report, Company, Job(s), Days Active, EmailTo, LastRun, and Status. There are two rows of data in the table.

Id	Date Requested	Report	Company	Job(s)	Days Active	EmailTo	LastRun	Status
13688	06/05/2020	Mail Piece Detail	The Mailing Group	258666	21	dlewis@snailworks.com	6/5/2020 9:48:18 PM	Completed
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

Report types are displayed and grouped by function.

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



New Report Request

Report | Data | Schedule | Delivery Method

Report Selection

Choose one from available Report types

Job Summary <ul style="list-style-type: none"><input type="radio"/> View By Date<input type="radio"/> View By Postal Area<input type="radio"/> View By Split<input type="radio"/> View By NDC<input type="radio"/> View By State<input type="radio"/> View By SCF<input type="radio"/> View By Zip3<input type="radio"/> View By Zip5<input type="radio"/> Induction Point<input type="radio"/> View By IM Container Barcode<input type="radio"/> View By IM Tray Barcode<input type="radio"/> View By Userdefined1<input type="radio"/> View By Userdefined2<input type="radio"/> View By Userdefined3	Job Performance <ul style="list-style-type: none"><input type="radio"/> Performance Report<input type="radio"/> Performance By Postal Area<input type="radio"/> Performance By NDC<input type="radio"/> Performance By SCF<input type="radio"/> Performance By State<input type="radio"/> Performance By Zip3<input type="radio"/> Performance By Zip5<input type="radio"/> Performance By Split	Event & Exception <ul style="list-style-type: none"><input type="radio"/> Late Delivery Exception Report<input type="radio"/> YourMail Notification
Job Detail <ul style="list-style-type: none"><input type="radio"/> Mail Piece Detail<input type="radio"/> USPS Raw Scans	Postal Performance <ul style="list-style-type: none"><input type="radio"/> Postal Performance<input type="radio"/> Postal Performance By Postal Area<input type="radio"/> Postal Performance By Split<input type="radio"/> Postal Performance By NDC<input type="radio"/> Postal Performance By SCF<input type="radio"/> Postal Performance By State<input type="radio"/> Postal Performance By Zip3<input type="radio"/> Postal Performance By Zip5	ACS <ul style="list-style-type: none"><input type="radio"/> ACS Data Export<input type="radio"/> ACS Job Summary<input type="radio"/> ACS Job Summary By Userdefined
Multi-Job <ul style="list-style-type: none"><input type="radio"/> Multi-Job Summary By Name<input type="radio"/> Multi-Job Summary By SCF<input type="radio"/> Daily Delivery Report<input type="radio"/> Vendor Compliance	Logistics Scans <ul style="list-style-type: none"><input type="radio"/> Logistics Scans by Induction Point<input type="radio"/> IMCB Logs<input type="radio"/> Logistics Scans by Container<input type="radio"/> Container Summary<input type="radio"/> IMTB Logs	Inbound <ul style="list-style-type: none"><input type="radio"/> Inbound Tracking Detail<input type="radio"/> Inbound By PieceID
		Informed Delivery <ul style="list-style-type: none"><input type="radio"/> ID Campaign Summary<input type="radio"/> ID Campaign Detail<input type="radio"/> Informed Delivery Data<input type="radio"/> ID Daily Summary
		Billing <ul style="list-style-type: none"><input type="radio"/> Monthly Invoice Detail<input type="radio"/> Unmatched Scans<input type="radio"/> Unmatched Scans Sample
		Seamless <ul style="list-style-type: none"><input type="radio"/> Undocumented Details<input type="radio"/> Undocumented Summary

Report Name:

Report Description:

Next Cancel



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

– Job Summary

- View By Date
- View By Postal Area
- View By Split
- View By NDC
- View By State
- View By SCF
- View By Zip3
- View By Zip5
- Induction Point
- View By IM Container Barcode
- View By IM Tray Barcode
- View By Userdefined1
- View By Userdefined2
- View By Userdefined3

– Job Performance

- Performance Report
- Performance By Postal Area
- Performance By NDC
- Performance By SCF
- Performance By State
- Performance By Zip3
- Performance By Zip5
- Performance By Split

– Event & Exception

- Late Delivery Exception Report
- YourMail Notification

– Multi-Job

- Multi-Job Summary By Name
- Multi-Job Summary By SCF
- Daily Delivery Report
- Vendor Compliance

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.



New Report Request

Report | Data | Schedule | Delivery Method

Report Selection

Choose one from available Report types

Job Summary <ul style="list-style-type: none"><input type="radio"/> View By Date<input type="radio"/> View By Postal Area<input type="radio"/> View By Split<input type="radio"/> View By NDC<input type="radio"/> View By State<input type="radio"/> View By SCF<input type="radio"/> View By Zip3<input type="radio"/> View By Zip5<input type="radio"/> Induction Point<input type="radio"/> View By IM Container Barcode<input type="radio"/> View By IM Tray Barcode<input type="radio"/> View By Userdefined1<input type="radio"/> View By Userdefined2<input type="radio"/> View By Userdefined3	Job Performance <ul style="list-style-type: none"><input type="radio"/> Performance Report<input type="radio"/> Performance By Postal Area<input type="radio"/> Performance By NDC<input type="radio"/> Performance By SCF<input type="radio"/> Performance By State<input type="radio"/> Performance By Zip3<input type="radio"/> Performance By Zip5<input type="radio"/> Performance By Split	Event & Exception <ul style="list-style-type: none"><input type="radio"/> Late Delivery Exception Report<input type="radio"/> YourMail Notification
Job Detail <ul style="list-style-type: none"><input type="radio"/> Mail Piece Detail<input type="radio"/> USPS Raw Scans	Postal Performance <ul style="list-style-type: none"><input type="radio"/> Postal Performance<input type="radio"/> Postal Performance By Postal Area<input type="radio"/> Postal Performance By Split<input type="radio"/> Postal Performance By NDC<input type="radio"/> Postal Performance By SCF<input type="radio"/> Postal Performance By State<input type="radio"/> Postal Performance By Zip3<input type="radio"/> Postal Performance By Zip5	ACS <ul style="list-style-type: none"><input type="radio"/> ACS Data Export<input type="radio"/> ACS Job Summary<input type="radio"/> ACS Job Summary By Userdefined
Multi-Job <ul style="list-style-type: none"><input type="radio"/> Multi-Job Summary By Name<input type="radio"/> Multi-Job Summary By SCF<input type="radio"/> Daily Delivery Report<input type="radio"/> Vendor Compliance	Logistics Scans <ul style="list-style-type: none"><input type="radio"/> Logistics Scans by Induction Point<input type="radio"/> IMCB Logs<input type="radio"/> Logistics Scans by Container<input type="radio"/> Container Summary<input type="radio"/> IMTB Logs	Inbound <ul style="list-style-type: none"><input type="radio"/> Inbound Tracking Detail<input type="radio"/> Inbound By PieceID
		Informed Delivery <ul style="list-style-type: none"><input type="radio"/> ID Campaign Summary<input type="radio"/> ID Campaign Detail<input type="radio"/> Informed Delivery Data<input type="radio"/> ID Daily Summary
		Billing <ul style="list-style-type: none"><input type="radio"/> Monthly Invoice Detail<input type="radio"/> Unmatched Scans<input type="radio"/> Unmatched Scans Sample
		Seamless <ul style="list-style-type: none"><input type="radio"/> Undocumented Details<input type="radio"/> Undocumented Summary

Report Name:

Report Description:

Next Cancel

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.



Mail Tracking Campaigns New Campaign Upload Files Reports Profile New Client

New Report Request

Report Data Schedule Delivery Method

Data Selection

Choose Company:

- ▼ Demonstration Account
 - First Class Delivery Job
 - Newly Added Client
 - Standard Rate Account
 - The Mailing Group

Choose job(s):

- Choose Job(s) --
- All Jobs --
- [373121] Demonstration Mailing - All Splits
- [266506] Primary Round 2 - All Splits
- [258666] 2020 Primary - All Splits

Will run for 21 Days From last Drop Date

Date Type: Delivery Scan ▼

Prev Next Cancel

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.

A screenshot of a web application interface for scheduling a report. The top navigation bar includes links for Mail Tracking, Campaigns, New Campaign, Upload Files, Reports, Profile, and New Client. The main content area is titled 'New Report Request' and has four tabs: Report, Data, Schedule (which is active), and Delivery Method. Under the 'Schedule' tab, there are three radio button options for 'Schedule Type': 'Run Now', 'Run on Future Date', and 'Run on Daily Schedule' (which is selected). To the right of these options is a 'Schedule (Days & Hours)' section with a table of days and their corresponding times. The table has columns for Sun, Mon, Tue, Wed, Thu, Fri, and Sat. The values are: Sun (off), Mon (10 AM), Tue (10 AM), Wed (10 AM), Thu (10 AM), Fri (10 AM), and Sat (off). At the bottom right of the form are three buttons: 'Prev', 'Next', and 'Cancel'.

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

A screenshot of the 'New Report Request' form in the SnailWorks application. The form has a purple header with navigation tabs: Mail Tracking, Campaigns, New Campaign, Upload Files, Reports, Profile, and New Client. Below the header, the form title is 'New Report Request'. There are four tabs: Report, Data, Schedule, and Delivery Method (which is currently selected). The form contains three main sections: 'Email From Address' with the value 'customerservice@snailworks.com', 'Email Recipient(s)' with the value 'kbartram@snailworks.com' and a note '(separated by comma)', and 'Delivery Format' with a list of radio button options: 'Embedded HTML within Email' (selected), 'HTML Attachment via Email', 'Formatted Excel Attachment via Email', 'Excel Data-Only Attachment via Email', 'PDF Attachment via Email', and 'CSV Data File - Via FTP'. At the bottom right of the form are three buttons: 'Prev', 'Save', and 'Cancel'.

Scheduling a Daily Delivery Report

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

Mail Tracking Campaigns New Campaign Upload Files Reports Profile New Client									
My Report Requests									
	Id	Date Requested	Report	Company	Job(s)	Days Active	EmailTo	LastRun	Status
 	21001	06/23/2021	Daily Delivery Report - Demonstration Account	Demonstration Account	All	21	kbartram@snailworks.com	6/23/2021 10:05:05 AM	Active
 	13688	06/05/2020	Mail Piece Detail	The Mailing Group	258666	21	dlewis@snailworks.com	6/5/2020 9:48:18 PM	Completed
 	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.

QUESTIONS?

We love to hear
from our clients!



SNAILWORKS
Direct Mail Insights & Solutions



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