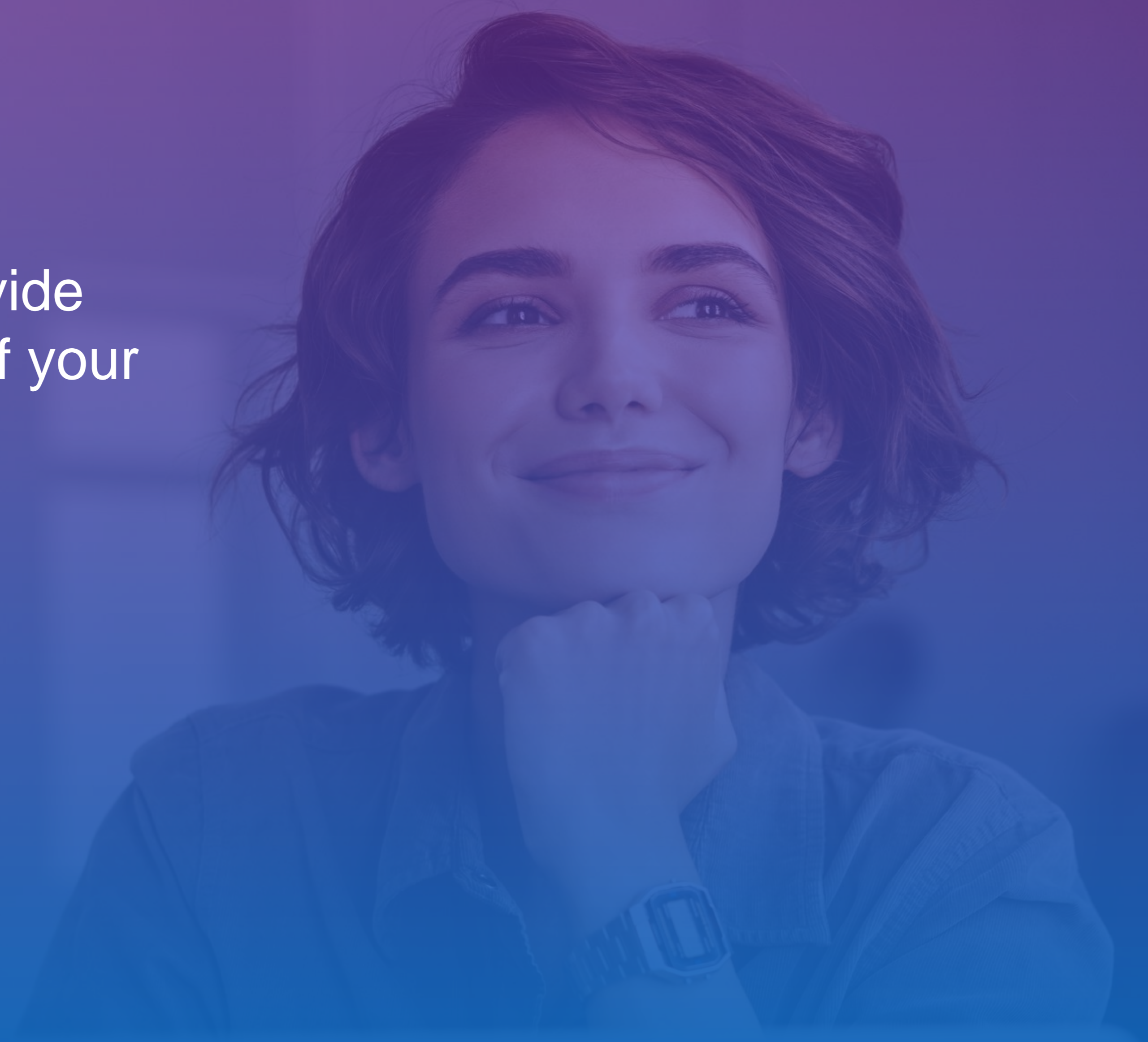


# Leveraging User Defined Fields





The User Defined Fields provide reporting ability for subsets of your mailing as well as enhanced record search options.





Package or Message

Chapter/District/Territory

Source / Interest Coding

Unique Identifiers

# User Defined Fields

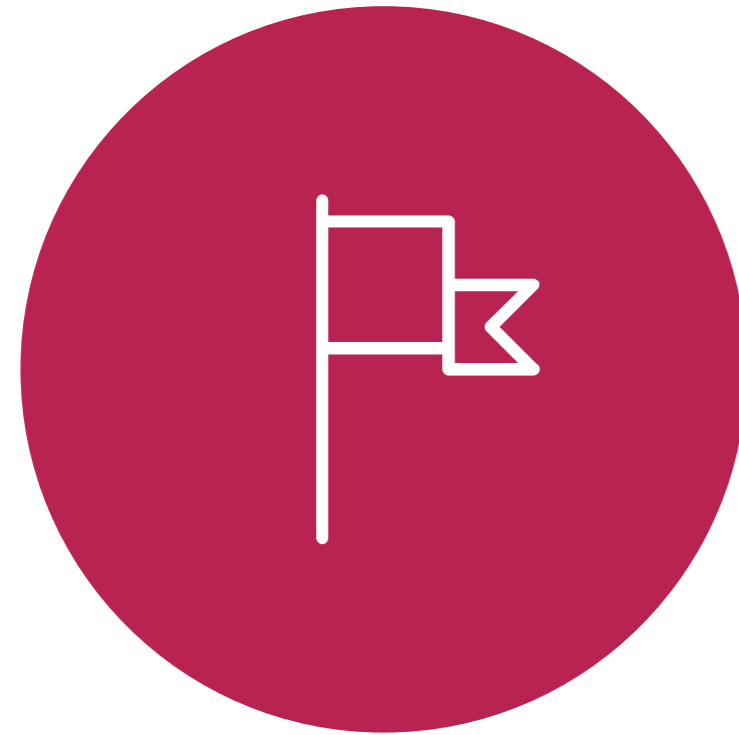
Use and Reporting

SnailWorks™ allows for up to 5 user defined fields in our data structure. Three of these fields are intended for be used for summary level groupings and two are intended for highly unique values.

UDF fields bring lots of additional power to your mail tracking reports!

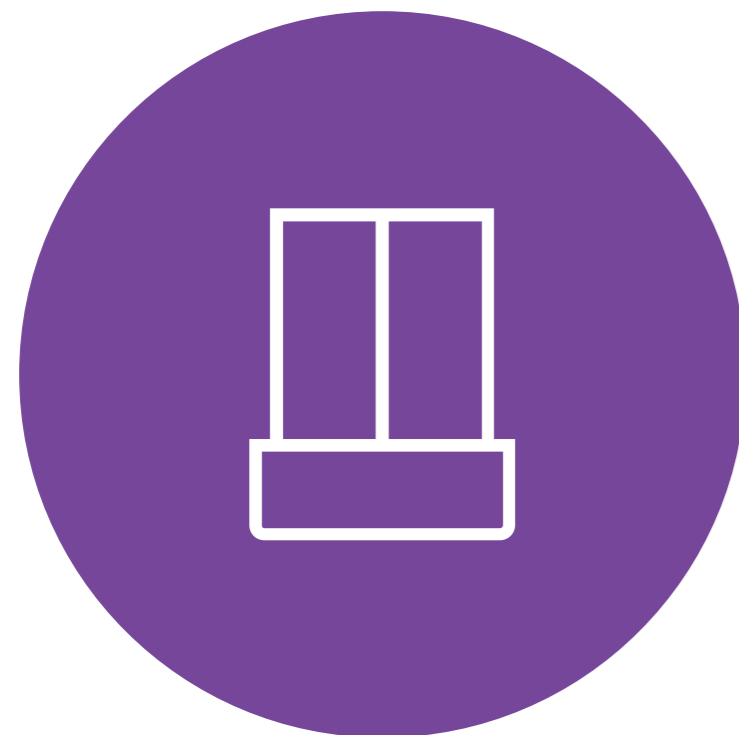


# Summary Level Groupings or Unique?



## Summary Level Groupings

UDF 1-3 are intended for summary reporting – allows you to group and view tracking results for all records with the same value in that particular field. Think of these as “subsets” of your mailing – source codes, territories, offer codes.



## Unique

UDF 4-5 are for attributes unique to that particular record – membership number, finder code, anniversary date – these fields can be used for searching for a particular record.



# STEPS FOR LEVERAGING USER DEFINED FIELDS

- STEP ONE:** Enable and label the User Defined Fields in your account setup.
- STEP TWO:** Populate desired User Defined fields in data uploads to SnailWorks.
- STEP THREE:** View or schedule UDF reports.

You may have different UDF settings for each of your client accounts.



# ENABLING USER DEFINED FIELDS

You will want to **Enable and Label** your user defined fields so reports will display correctly. This is done from your account setting screen. **Select** the account you wish to enable and **Click** on the pencil icon.

You may have different UDF settings for each of your client accounts.



Mail Tracking Campaigns New Campaign Upload Files Reports Profile New Client

Clients

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

Mail Tracking Client Summary

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		
13810	The Mailing Group	2	4	250,000	250,000



# ENABLING USER DEFINED FIELDS

The UDF settings are towards the bottom of the account tab. **Scroll down**, you will see the setting box which lists the available fields. **Click** on the ones you wish to enable and add the appropriate label name. **Click** the save button.

The label you assign for your UDF fields will display on your reports.



**Add / Edit Company**

Company Name: First Class Delivery Job  
Account Type: Reseller Client  
Parent Company: Demonstration Account  
Billable Company: Demonstration Account  
Virtual Parent Company: -- Choose Client --  
Client Type: All - SnailWorks & Mail Tracking  
Remote Login Key:

Mailing/Shipping Address

Contact Name:  
Street:  
Address Line 2:  
City:  
State or Province:  
Zip:  
Phone:  
Fax:  
Email:  
Billing In  
 Same as Address Above  
Contact Name:

**Mail Tracking Preferences**  
Preferred Page: View By Map

**User-defined Column Labels**

UDC	Enabled	Label
1	<input type="checkbox"/>	UserDefined1
2	<input type="checkbox"/>	UserDefined2
3	<input type="checkbox"/>	UserDefined3
4	<input type="checkbox"/>	UserDefined4
5	<input type="checkbox"/>	UserDefined5

[Client Activity Report](#)  
[Monthly Billing Report](#)  
[Unmatched Scans](#)  
[Scan Volume By MID](#)

Date Created: 12/18/2018 9:02:31 AM  
Date Modified: 12/18/2018 1:08:04 PM



# POPULATING USER DEFINED FIELDS

**User Defined Fields** are located in fields 22-26 of the SnailWorks standard layout. If you are a One-Step user you will want to work with SnailWorks customer service to ensure these fields are correctly mapped for your layout.

If you are a One-Step user you will want to update your data upload profile to include UDF fields.



SnailWorks™ Standard Data File Layout - Version 1.6

Col#	Data Element	Format	Validation Rules
1	RecordId	Varchar(20)	Optional – for customer use
2	Postnet	Varchar(11)	Optional - Required For Mail-Tracking
3	IMB	Varchar(20)	Optional <sup>1</sup> – DO NOT USE, requires agreement for special
4	SourceCode	Varchar(15)	Optional – for customer use
5	Greeting	Varchar(10)	Optional
6	FirstName	Varchar(20)	Required <sup>2</sup>
7	MiddleName	Varchar(20)	Optional
8	LastName	Varchar(20)	Required <sup>2</sup>
9	Suffix	Varchar(10)	Optional
10	FullName	Varchar(80)	Required <sup>3</sup>
11	Title	Varchar(50)	Optional
12	Company	Varchar(80)	Optional
13	Street	Varchar(50)	Required
14	Addr2	Varchar(50)	Optional
15	Addr3	Varchar(50)	Optional
16	City	Varchar(28)	Required
17	State	Varchar(2)	State Abbreviation - Required
18	Zip	Varchar(10)	Required
19	Country	Varchar(30)	Optional
20	Email	Varchar(60)	Optional
21	Phone	Varchar(25)	Optional
22	UDF01_SummaryField <sup>4</sup>	Varchar(80)	Optional – For summary level groupings
23	UDF02_SummaryField <sup>4</sup>	Varchar(80)	Optional – For summary level groupings
24	UDF03_SummaryField <sup>4</sup>	Varchar(80)	Optional – For summary level groupings
25	UDF04_Identifier <sup>5</sup>	Varchar(80)	Optional – For Ids, Account Ids, etc.
26	UDF05_Identifier <sup>5</sup>	Varchar(80)	Optional – For Ids, Account Ids, etc.
27	InductionPoint	Varchar(80)	Optional – use for Entry/Induction Point
28	InductionDate	Varchar(10)	Optional - YYYY/MM/DD
29	SeedIndicator	Varchar(1)	Optional - non-blank indicates SEED record
30	SplitIdentifier <sup>6</sup>	Varchar(50)	Optional - used for Auto-splitting <sup>6</sup>
31	InboundIMB	Varchar(31)	Optional for Round Trip jobs only
32	IMcb	Varchar(24)	Optional – Container Barcode
33	IMtb	Varchar(24)	Optional – Tray Barcode





# REPORTING BY USER DEFINED FIELDS

Once UDFs are enabled reporting options will be added to your Report Type drop down menu allowing you to view delivery by the values in UDF 01, 02 or 03. When UDF 04 and 05 are enabled you will be able to search on these values.

Split Id/Name: All Splits		Piece Type: Letter		Total Scans: 18,599					
Split Description: Multiple		First Drop Date: 8/19/2021		Total Scan Pct: 90.51% - *D					
Job Summary By LaserCode	Pieces Tracked	*Delivery Scans	% Scanned	ID Subscribers	ID Emails	Mon 08/23	Tue 08/24	Wed 08/25	Thu 08/26
V01	693	0	0.0						
V02	799	0	0.0						
V03	7,717	7,630	98.9						
V04	11,340	10,969	96.7			58	1,495	1,209	923
Totals:	20,549	18,599	90.5%	0	0	58	1,495	1,209	923

Report Type: -- View By LaserCode

- Performance By ZIP3
- Performance By ZIP5
- POSTAL PERFORMANCE
- Performance By Job
- Performance By Split
- Performance By USPS Postal Area
- Performance By NDC
- Performance By SCF
- Performance By State
- Performance By ZIP3
- Performance By ZIP5
- USPS POSTAL SCANS
- Barcode Lookup
- USPS Scans
- USPS Scan Summary
- Seamless Reports
- Undocumented Summary
- Undocumented Detail
- USERDEFINED**
- View By LaserCode

Mailpiece Lookup

Search Criteria	
Customer Unique Id:	<input type="text"/> [Full or partial match]
MID:	<input type="text"/> [Exact Match 6 or 9 digit MID]
Serial Number:	<input type="text"/> [Exact Match 6 or 9 digit Serial Number]
Last Name:	<input type="text"/> [Full or partial match]
First Name:	<input type="text"/> [Full or partial match]
Full Name:	<input type="text"/> [Full or partial match]
Company:	<input type="text"/> [Full or partial match]
State:	<input type="text"/> [2-char State exact match]
City:	<input type="text"/> [Full or partial match]
Zip or Postnet:	<input type="text"/> [Full or partial match]
Trans ID	<input type="text"/> [Full or partial match]
FutureUs	<input type="text"/> [Full or partial match]
Submit	



# REPORTING BY USER DEFINED FIELDS

Using the SnailWorks scheduled reports tool you may schedule reports by User Defined Fields 1-3.

The screenshot displays the 'New Report Request' interface in the SnailWorks system. The top navigation bar includes 'Mail Tracking', 'Campaigns', 'New Campaign', 'Upload Files', 'Reports', 'New Client', and 'Admin'. The main content area is titled 'New Report Request' and features a 'Report Selection' section with tabs for 'Report', 'Data', 'Schedule', and 'Delivery Method'. Below this, users are prompted to 'Choose one from available Report types'. The interface is organized into several columns of report categories, each with a list of options and radio buttons. The 'Job Summary' category is highlighted in yellow, and the 'View By Userdefined1' option is selected and circled in red. Other categories include 'Job Performance', 'Event & Exception', 'ACS', 'Job Detail', 'Postal Performance', 'Inbound', 'Informed Delivery', 'Multi-Job', 'Logistics Scans', 'Billing', and 'Seamless'. At the bottom, the 'Report Name' is set to 'View By DropDate' and the 'Report Description' is 'Summary level view per job by User-Defined Field 1'. A speaker icon is visible in the bottom right corner.

Category	Report Type
Job Summary	<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 IMCB Barcode
	<input checked="" type="radio"/> View By Userdefined1
	<input type="radio"/> View By Userdefined2
<input type="radio"/> View By Userdefined3	
Job Detail	<input type="radio"/> Mail Piece Detail
	<input type="radio"/> USPS Raw Scans
Multi-Job	<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
Job Performance	<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 Zip3
	<input type="radio"/> Performance By Zip5
	<input type="radio"/> Performance By Split
	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	
Logistics Scans	<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
Event & Exception	<input type="radio"/> Late Delivery Exception Report
	<input type="radio"/> YourMail Notification
ACS	<input type="radio"/> ACS Data Export
	<input type="radio"/> ACS Job Summary
	<input type="radio"/> ACS Job Summary By Userdefined
Inbound	<input type="radio"/> Inbound Tracking Detail
	<input type="radio"/> Inbound By PieceID
Informed Delivery	<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	<input type="radio"/> Monthly Invoice Detail
	<input type="radio"/> Unmatched Scans
	<input type="radio"/> Unmatched Scans Sample
	<input type="radio"/> Monthly ID Billing Summary
Seamless	<input type="radio"/> Undocumented Details
	<input type="radio"/> Undocumented Summary

Report Name: View By DropDate  
Report Description: Summary level view per job by User-Defined Field 1



## Reminders:

1. UDF fields 1-3 allow for summary reporting.
2. UDF fields 4 & 5 are used for unique values.
3. Enable the fields in the account provide and update the field label.
4. Remember to include the data in your SnailWorks uploads and to update your SnailWorks One-Step profile.



# QUESTIONS?

We love to hear  
from our clients!



**SNAILWORKS**  
*Direct Mail Insights & Solutions*



[customerservice@snailworks.com](mailto:customerservice@snailworks.com)



Phone: 855-697-6245



4510 Buckeystown Pike,  
Frederick, MD 21704



[snailworks.com](http://snailworks.com)

