

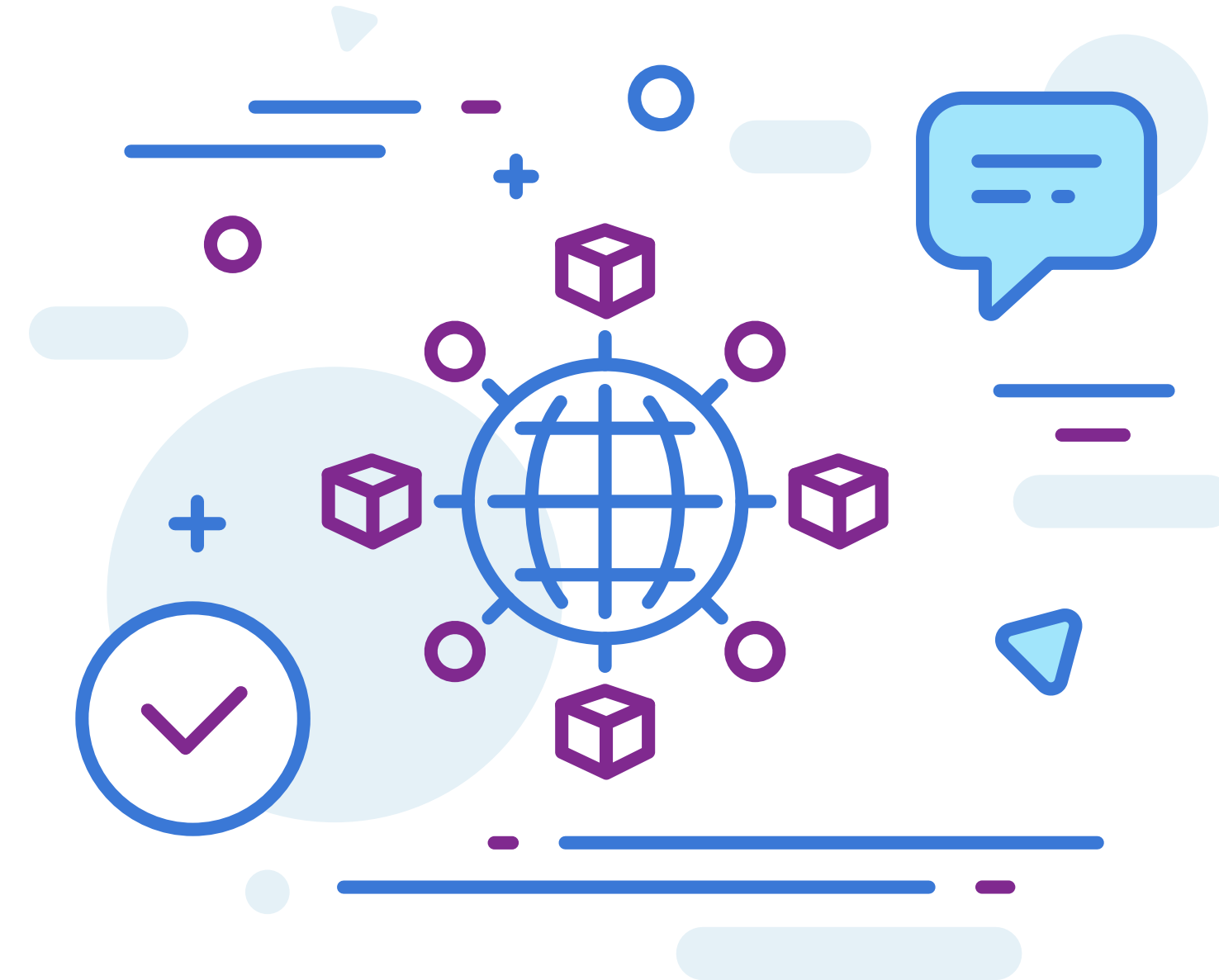


Creating Jobs and Uploading Data in SnailWorks



Creating Jobs and Uploading Data in SnailWorks




In this demo, we will cover how to create a mail tracking job using the SnailWorks Mailer ID and upload the data file, so you have the matching Intelligent Mail Barcode (IMb) for your mail piece.




CREATING THE JOB

Once you have logged in to the SnailWorks site (www.SnailWorks.com) and access your account dashboard, click on the subaccount (if present). Then, click the plus icon [+], in the upper righthand corner of the red bar. This will pull up the **Mail Tracking - Create Job** screen.

Mail Tracking ▾ Campaigns ▾ Company ▾ Reports ▾ Admin ▾ Analytics ▾ Support ▾

Mail Tracking - Jobs - TEST3 *Delivery Date ▾   

| | Company | Job Id | Job Name | Job/Split Description | Type | Class | PT | ACS | ID | Mail Date | Mailed | Tracked | Scans | Scan % |
|---|---------|--------|----------|-----------------------|------|-------|----|-----|----|-----------|--------|---------|-------|--------|
|  | TEST3 | 554719 | Test | | 0 | S | L | | | 02/09/23 | 100 | 100 | 0 | 0.00% |
| | TEST3 | 499929 | test | | 0 | F | L | | | 08/18/22 | 5 | 5 | 0 | 0.00% |
| | TEST3 | 437703 | Test | | 0 | F | L | Y | | 02/02/22 | 1 | 1 | 0 | 0.00% |
| | TEST3 | 402921 | Test | Description here | 0 | F | L | | | 10/05/21 | 5 | 5 | 0 | 0.00% |

Displaying rows 1 to 4 of a total of 4 rows

CREATING THE JOB

This is where you will fill in the job details:

- **Outbound Tracking** is the default. This is for outbound mail pieces only.
- Type in your **Job Name & Job Description**. This is your chance to identify the mailing. You may wish to include your project number, the month & year and the project name.
- The **Mailer ID (MID)** will default to the SnailWorks MID.
- Choose the **Mail Class, Piece Type**, Yes or No if you are mailing **Full Service** or including **ACS**, and if this is **Ballot** or **Political** mail. These choices will determine the **Service Type ID (STID)**.
- The **Contact Email(s)** is for the person/people that need to receive the job notification emails. You can add additional addresses by separating them with a comma.
- Now you will add the file details. Click on **Add Outbound Split**.

Mail Tracking - Create Job [Edit Dates](#)

Client: TEST3

Type of Job:
 Outbound Tracking - Track outbound mailpieces only.
 Inbound Tracking Only - Track inbound mailpieces only.
 Round Trip Tracking - Track both outbound mailpieces and business reply envelopes

Job Name:

Job Description:

MID: 109525 - SnailWorks Default MID

Mail Class: -- Choose --

Piece Type: --Choose--

Full Service: Yes No

ACS: Yes No

Election Mail: N/A Ballot Political

Service Type Id:

Contact Email(s): Test3@testcompany.com

Job Versions or Splits: [Add Outbound Split](#)

| Action | Type | Split Name | Drop Date | Targeted Start End | Mail Class | FS | ACS | Election | Bar-Code | STID | MID | Mailed Quantity | Tracked Quantity |
|--------|------|------------|-----------|--------------------|------------|----|-----|----------|----------|------|-----|-----------------|------------------|
|--------|------|------------|-----------|--------------------|------------|----|-----|----------|----------|------|-----|-----------------|------------------|

CREATING THE JOB

This is where you will fill in the job details:

- **Split Name** can be the same as your job name if you only have one package/file. If you have more than one, it should be different for each one.
- The **Split Description** can be the same as the Split name or you can leave it blank.
- The next eight fields should prefill from the previous screen. If you need to change the **Mail Class** or **Piece Type**, this is where you can do so.
- Enter the final record count in both the **Mail Qty** and **Tracked Qty** fields. You will be tracking all records in your mailing.
- Select or type the **Mail Drop Date**. This is where you stop and click on **Save**. You can then add additional splits/packages at this time.

Mail Tracking ▾ Campaigns ▾ Company ▾ Reports ▾ Admin ▾ Analytics ▾ Support ▾

Mail Tracking - Create Split or Version

Split - Required Fields

Job Name: Test123

Type of Split: Outbound

Split Name:

Description:

Mail Class: Standard Mail ▾

Piece Type: Letters ▾

MID: 109525 - SnailWorks Default MID ▾

Full Service: Yes No

Election Mail: N/A Ballot Political

ACS: Yes No

Barcode Id: 00

Service Type Id: 271 - Full Service IMB - No Address Corrections ▾

Mailed Qty:

Tracked Qty:

Mail Drop Date:

Tracking End Date: (use only for extended periods)

Split - Optional Fields

Return Zip+4: [9-digits, no hyphen]

Targeted Delivery Date - Start:

Targeted Delivery Date - End:

Campaign / Effort: -- Choose Campaign/Effort -- ▾

Vendor Assignment: -- Choose One -- ▾

Informed Delivery: Yes No

Save Cancel



CREATING THE JOB

Mail Tracking ▾ Campaigns ▾ Company ▾ Reports ▾ Admin ▾ Analytics ▾ Support ▾

Mail Tracking - Create Job (584233) [Edit Dates](#)

Client: TEST3 ▾

Type of Job:
 Outbound Tracking - Track outbound mailpieces only.
 Inbound Tracking Only - Track inbound mailpieces only.
 Round Trip Tracking - Track both outbound mailpieces and business reply envelopes

Job Name: Test123 Full Service: Yes No

Job Description: Test123 ACS: Yes No

MID: 109525 ▾ Election Mail: N/A Ballot Political

Mail Class: Standard Mail ▾ Service Type Id: 271 - Full Service IMB - No Address Corrections ▾

Piece Type: Letters ▾ Contact Email(s): Test3@testcompany.com

Job Versions or Splits: [Add Outbound Split](#)

| Action | Type | Split Name | Drop Date | Targeted Start End | Mail Class | FS | ACS | Election | Bar-Code | STID | MID | Mailed Quantity | Tracked Quantity |
|--------------------------|------|------------|-----------|--------------------|---------------|----|-----|----------|----------|------|--------|-----------------|------------------|
| <input type="checkbox"/> | O | Test123 | 5/1/2023 | | Standard Mail | Y | | | 00 | 271 | 109525 | 10 | 10 |

[Save](#)

This is how your job should look when you have entered all job information. Now you can click on **Save** to move to the next screen.



UPLOADING DATA FILES

On this screen, you will find the details needed to create your IMbs. You have two options on how to proceed with your data file. The first is to click on **Upload Files** and follow the instructions for loading the data. The other is to take the IMb details shown on this page back to your presort software to build the IMb and click on **Done**. You will need to plug in the **STID**, **MID** and starting **Serial Number** and proceed with sorting your file. Be sure to mark the job as tracking to ensure the STID is not changed. Once you click on Upload Files, the **Mail Tracking - Upload & Encode Files** screen will be shown.

Mail Tracking ▾ Campaigns ▾ Company ▾ Reports ▾ Admin ▾ Analytics ▾ SWAdmin

Mail Tracking - Create Job

| | | | |
|------------------|---------------|-------------------|---|
| Client: | TEST3 | Contact Email(s): | Test3@testcompany.com |
| Job Name: | Test123 | Full Service: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Mail Class: | Standard Mail | ACS: | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Service Type Id: | 271 | MID: | 109525 |

IMB Tracking Ids Issued By Split

| Split Name | Range Id | Qty | Drop Date | Mail Class | Piece Type | FS | ACS | Bar-Code | STID | MID | Serial Number Start | Serial Number End |
|------------|----------|-----|-----------|---------------|------------|----|-----|----------|------|--------|---------------------|-------------------|
| Test123 | 1 | 10 | 5/1/2023 | Standard Mail | Letters | Y | | 00 | 271 | 109525 | 279761714 | 279761723 |

Back Upload File Done

UPLOADING DATA FILES

This is where you will fill in the File Upload details:

- If you are going through the job to upload the data, the first four fields will be prefilled.
- **File Options:** you will ALWAYS select **New or Replace Existing Records for this Job/split**. If you need to add records to your job, you will need to delete this job and create a new one.
- **Encoding Options:** If SnailWorks will be creating the IMBs, select **SnailWorks to Assign IMBs**. If you have created them, you will select **Informational Upload**. This tells us which records receive each of the serial numbers.
- **Return File Format:** The **Short Format** will only contain the Record ID, the IMb and the Encoded IMb. The **Long Format** will contain all fields that have been mapped and uploaded.
- **File to Upload:** Click on **Choose File** and select the file from your system.
- **Is File Standard Format?:** Select **Yes** if you followed our format or **No** if you need to map your data fields.
- Click on **Submit** when you are done.

Mail Tracking ▼ Campaigns ▼ Company ▼ Reports ▼ Admin ▼ Analytics ▼ SWAdmin

Mail Tracking - Upload & Encode Files View Upload History

Client: TEST3

Job: (584233) Test123

Version/Split: Test123 (5/1/2023-Standard Mail-10 Pieces)

| Split | Description | Split Type (0 or 1) | Service Typeid | Tracked Pieces |
|---------|-------------|---------------------|----------------|----------------|
| Test123 | | 0 | 271 | 10 |

Confirmation Email(s): test@testcompany.com Enter one or more email addresses separated by a comma.

File Options:
 New or Replace Existing Records for this Job/Split
 Append Records to this Job/Split

Encoding Options:
 SnailWorks to Assign IMBs: SnailWorks will sequentially assign and encode IMBs for this job & split. Please use our returned file to prepare your mailing. The IMB field in your upload file should be blank.
 Informational Upload: Use this option to tell SnailWorks which serial numbers you've assigned to each record. The IMB field must contain the first 20 digits of your numeric IMB. Please do not submit encoded IMB values (FATD).

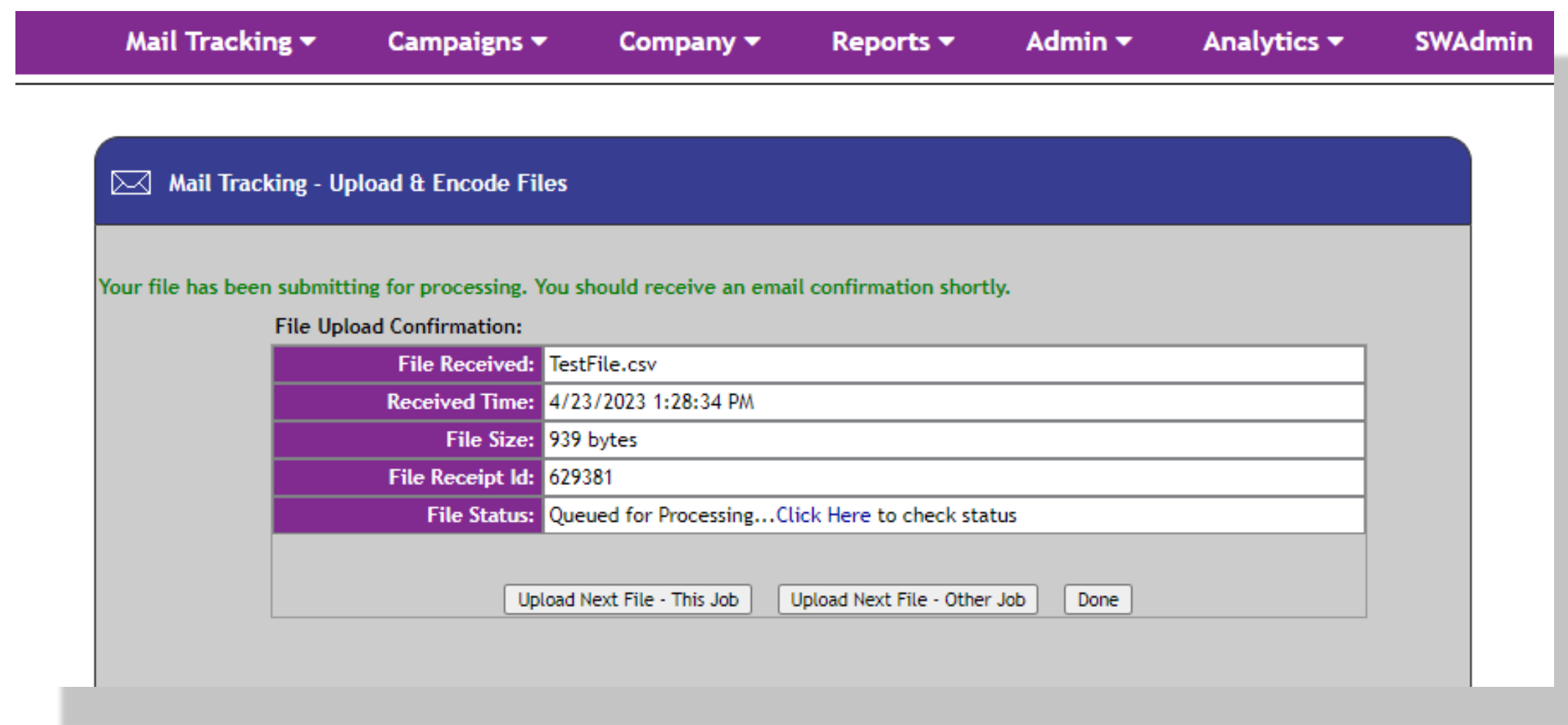
Return File Format:
 Short Format - [Returns RecordID, IMB, EncodedIMB only]
 Long Format - [Returns All Uploaded fields plus IMB, EncodedIMB]

File to Upload: Test File.csv

Is File Standard Format?:
 Yes - This file conforms to the SnailWorks standard upload format.
 No - Use *SnailWorks Connector* to transform my file. You can assign your columns to our format and we'll validate the records here.

Warning: After correcting any errors above you must press SUBMIT and WAIT for the File Confirmation information to appear below. Depending on the file size it may take a couple of minutes for this confirmation to appear.

UPLOADING DATA FILES



Mail Tracking - Upload & Encode Files

Your file has been submitted for processing. You should receive an email confirmation shortly.

File Upload Confirmation:

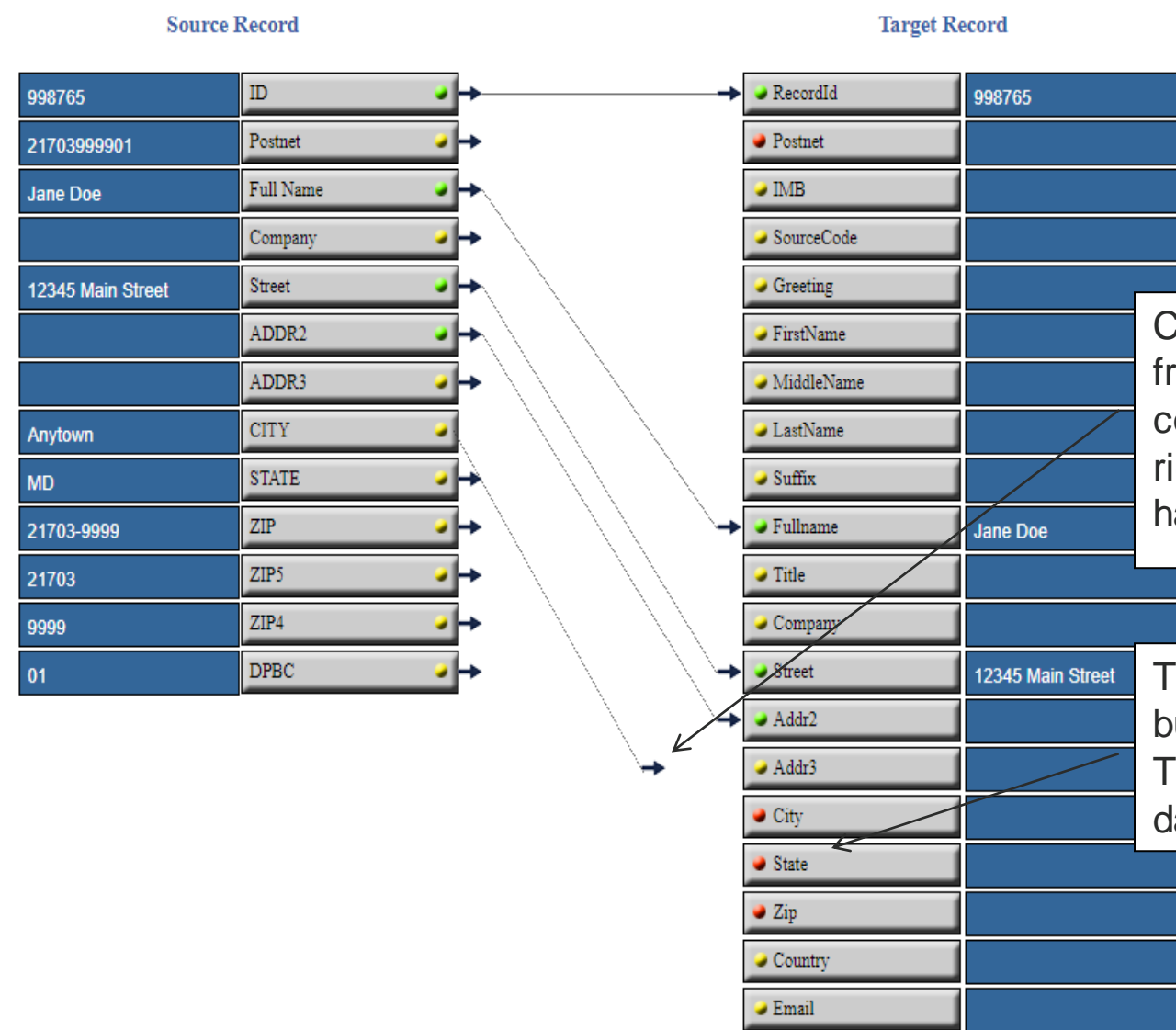
| | |
|------------------|---|
| File Received: | TestFile.csv |
| Received Time: | 4/23/2023 1:28:34 PM |
| File Size: | 939 bytes |
| File Receipt Id: | 629381 |
| File Status: | Queued for Processing... Click Here to check status |

If following the SnailWorks Standard File Layout, you will see the message to the left indicating the file has been submitted for processing.

An email will be sent to confirm it is uploaded successfully or if there are issues. The issues should be explained so you can go back and fix your file and upload again.

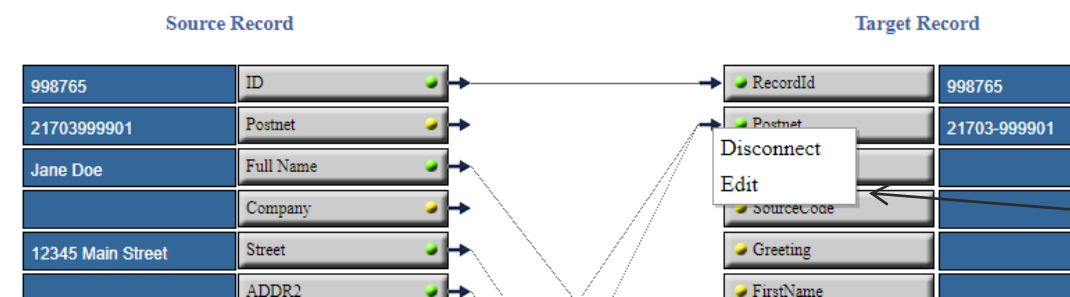
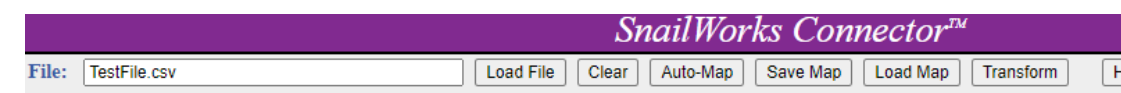


UPLOADING DATA FILES



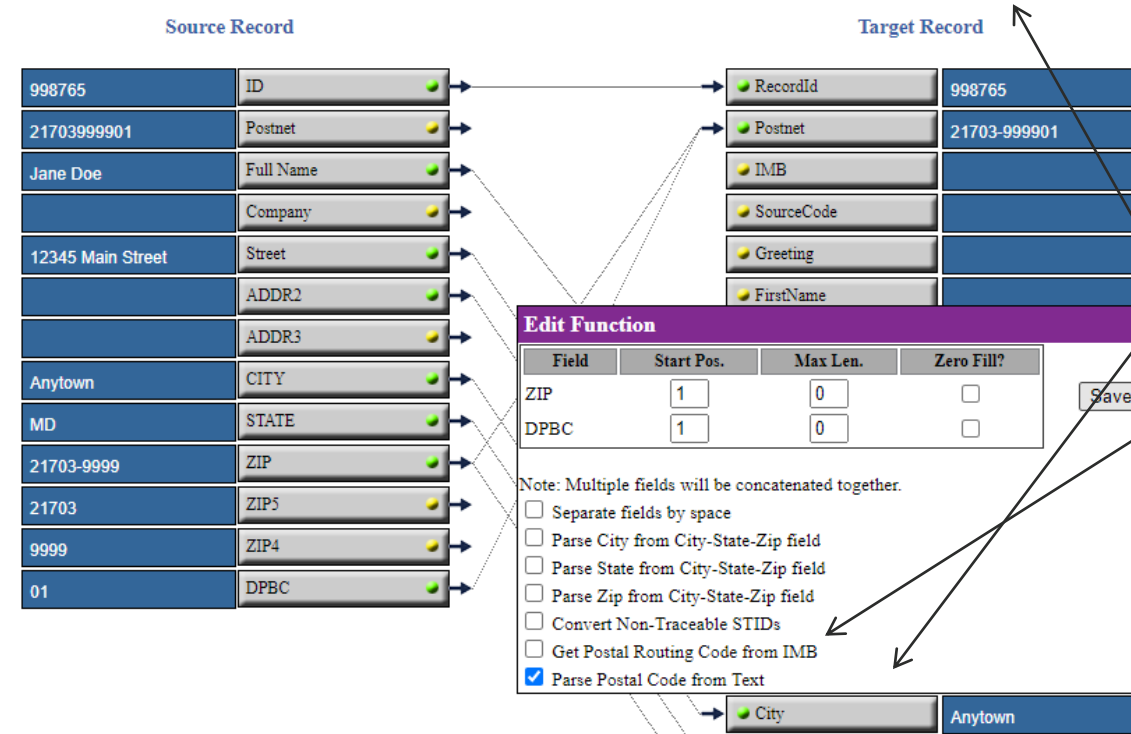
Click and drag the arrow from the left field to the corresponding field on the right and let go once you have reached the grey area.

The fields with the red buttons are required fields. They must be linked or the data file will fail.



If you do not have a **Postnet** field in your data, you can build it using the **Zip Code, +4** and the **DPB** from your NCOA or CASS. Click and drag all three to the Postnet field. If you only have the Zip+4 and DPB fields connect those and then right click on the tip of the arrow. This will bring a text box out that gives you the option to **Disconnect** or **Edit** the link. Select **Edit**.

You can use this when uploading Informational data by connecting the IMb to the **Postnet** field and extracting the **Postnet**.



| Field | Start Pos. | Max Len. | Zero Fill? |
|-------|------------|----------|--------------------------|
| ZIP | 1 | 0 | <input type="checkbox"/> |
| DPBC | 1 | 0 | <input type="checkbox"/> |

Separate fields by space
 Parse City from City-State-Zip field
 Parse State from City-State-Zip field
 Parse Zip from City-State-Zip field
 Convert Non-Traceable STIDs
 Get Postal Routing Code from IMB
 Parse Postal Code from Text

If your Zip Code contains a hyphen, you can remove it by selecting **Parse Postal Code from Text**.

If you are extracting from the IMb you would select **Get Postal Routing Code from IMB**.

When done click on **Save**. Then you can click on the **Transform** button in the Gray bar.



When the file has processed you should receive a message below the file name that indicates the record quantity was transformed successfully. If not, you will see what is wrong with the file.



MAIL TRACKING *SERVICES*

That should cover all the basics. As always, if you have any questions or need assistance, please contact your Project Manager. We love talking about SnailWorks!



QUESTIONS?

**We love to hear
from our clients!**



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