

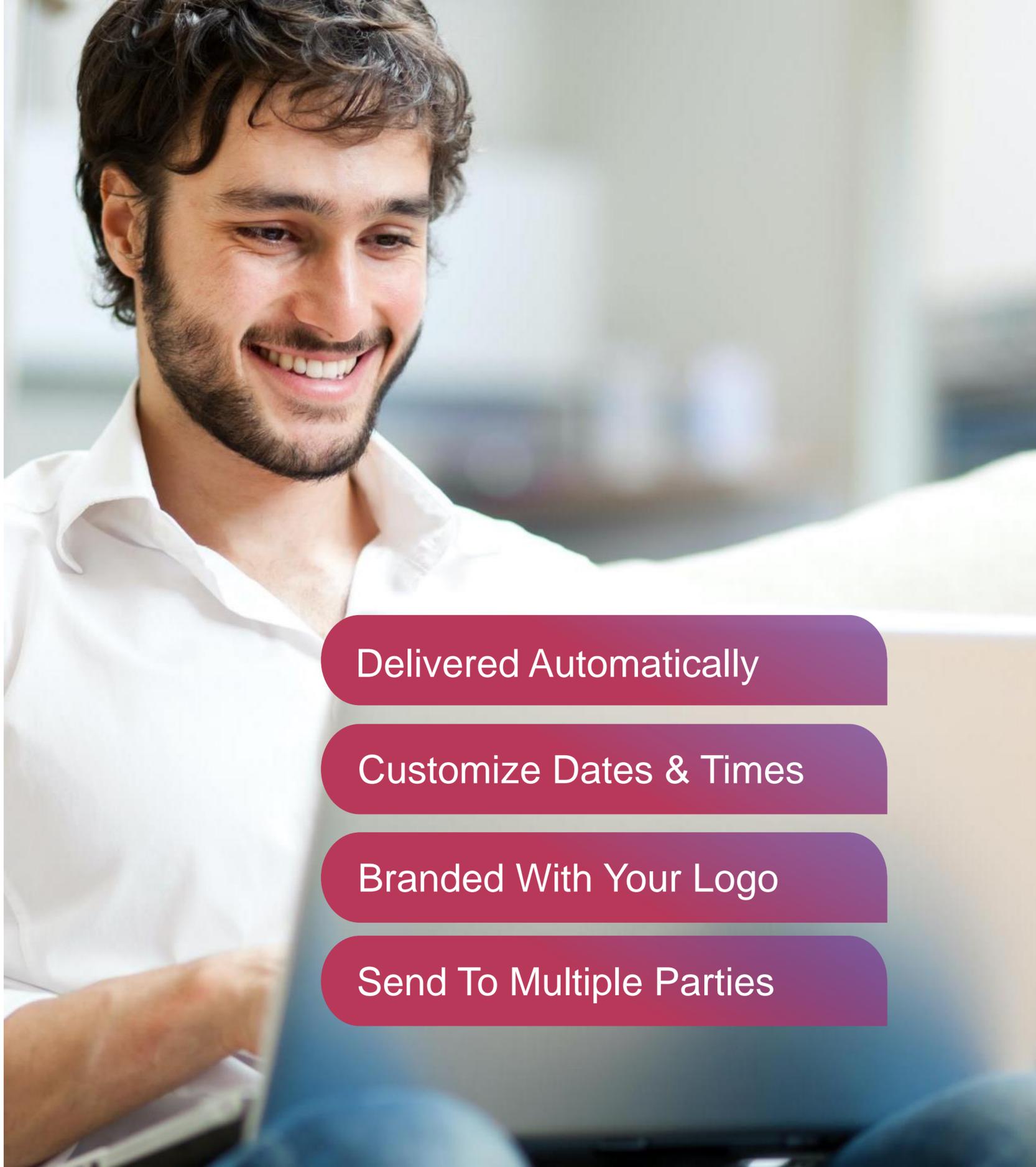


# Introduction To Scheduled Reports



**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 text on a purple background, with a red arrow pointing to it from the top right. Other menu items include Mail Tracking, Campaigns, New Campaign, Upload Files, Profile, and New Client. Below the navigation bar, there is a sidebar on the left with a 'Clients' section containing a dropdown menu with options: 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 for 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, both with a pencil icon and a red 'X' in the first column, indicating they are report requests.

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

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

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

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

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.



The screenshot shows a web interface for scheduling a report. At the top, there is a navigation bar with links: Mail Tracking, Campaigns, New Campaign, Upload Files, Reports, Profile, and New Client. Below this is a header for 'New Report Request' with tabs for Report, Data, Schedule (selected), 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 is as follows:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
off	10 AM	off				

At the bottom right of the form, there 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 system. The form is titled 'New Report Request' and has a navigation bar with tabs: 'Report', 'Data', 'Schedule', and 'Delivery Method'. The 'Delivery Method' tab is selected. The form contains the following fields:

- Email From Address:** A text input field containing 'customerservice@snailworks.com'.
- Email Recipient(s):** A text input field containing 'kbartram@snailworks.com' with a note '(separated by comma)' to its right.
- Delivery Format:** A list of radio button options:
  - Embedded HTML within Email
  - HTML Attachment via Email
  - Formatted Excel Attachment via Email
  - Excel Data-Only Attachment via Email
  - PDF Attachment via Email
  - 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](mailto:CustomerService@SnailWorks.com) to avoid the email being blocked by your server’s firewall.

# QUESTIONS?

We love to hear  
from our clients!



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*Direct Mail Insights & Solutions*



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