SNAILWORKS
Direct Mail Insights & Solutions

Leveraging
User Defined Fields

SNAILWORKS™
Direct Mail Insights & Solutions

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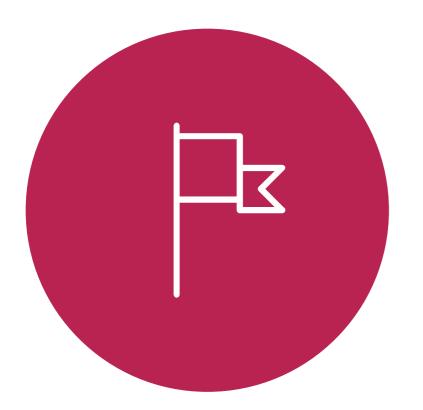
User Defined Fields

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.

Package or Message

Chapter/District/Territory

Source / Interest Coding

Unique Identifiers

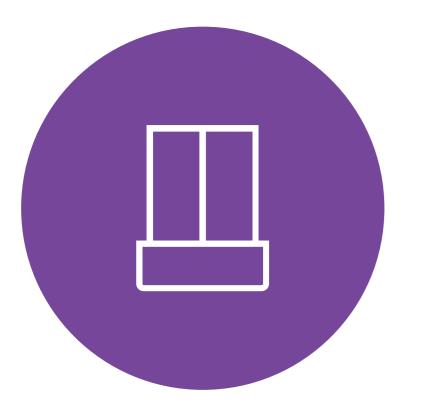UDF fields bring lots of additional power to your mail tracking reports!

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.

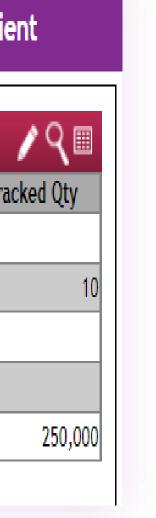You may have different UDF settings for each of your client accounts.

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

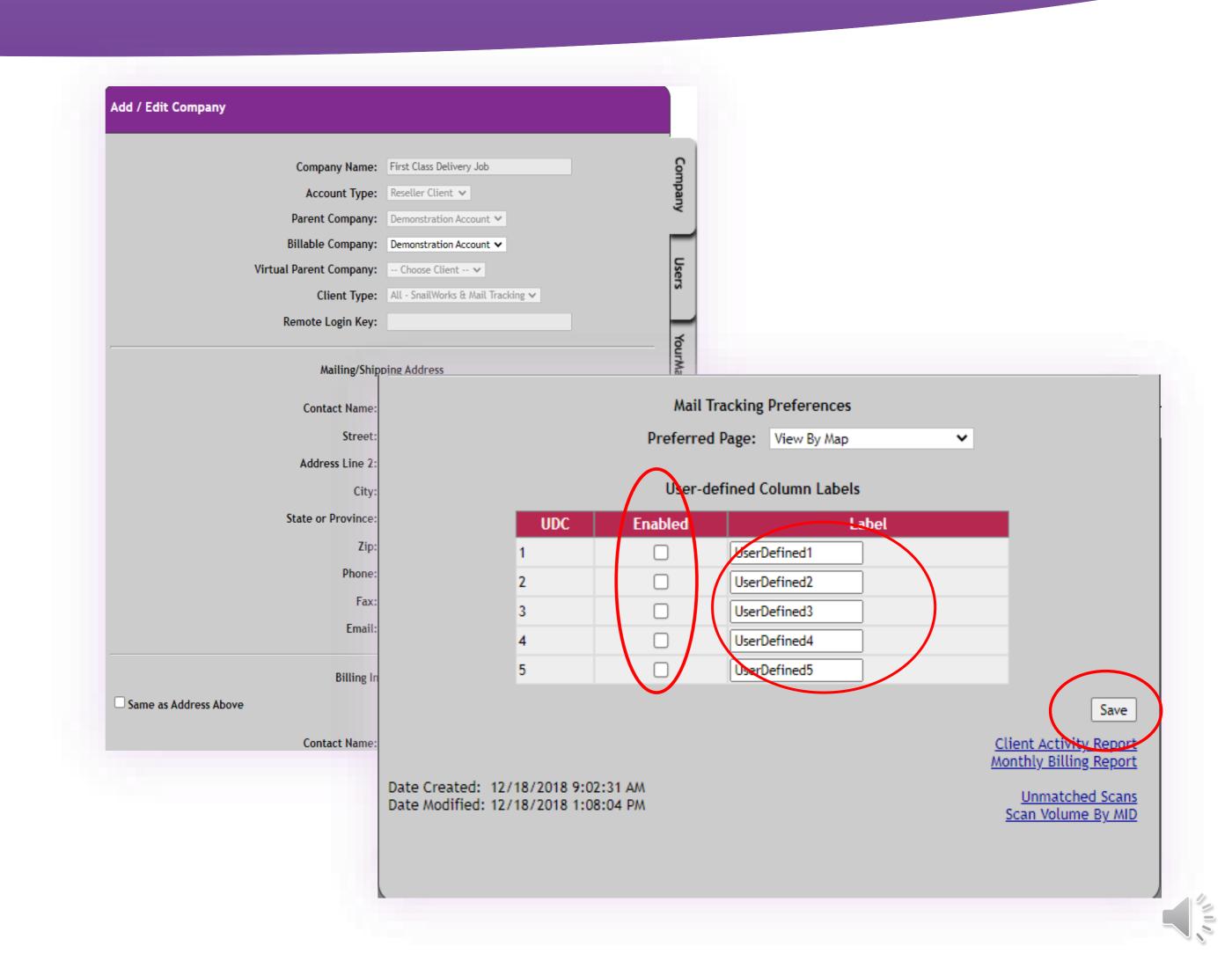| Account Id	Company Name	Job Cnt	Split Cnt	Total Mailed Qty	Total Tracked Qty
11200	Demonstration Account	0	0		
11204	First Class Delivery Job	1	1	10	10
15921	Newly Added Client	0	0		
11205	Standard Rate Account	0	0		
13810	The Mailing Group	2	4	250,000	250,000

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.

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

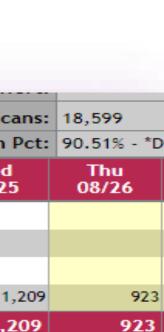| Col#	Data Element	Format	Validation Rules
1	RecordId	Varchar(20)	Optional – for customer use
2	Postnet	Varchar(11)	Optional - Required For Mail-Tracking
3	IMB	Varchar(20)	Optional[1] – DO NOT USE, requires agreement for special
4	SourceCode	Varchar(15)	Optional – for customer use
5	Greeting	Varchar(10)	Optional
6	FirstName	Varchar(20)	Required[2]
7	MiddleName	Varchar(20)	Optional
8	LastName	Varchar(20)	Required[2]
9	Suffix	Varchar(10)	Optional
10	FullName	Varchar(80)	Required[3]
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[4]	Varchar(80)	Optional – For summary level groupings
23	UDF02_SummaryField[4]	Varchar(80)	Optional – For summary level groupings
24	UDF03_SummaryField[4]	Varchar(80)	Optional – For summary level groupings
25	UDF04_Identifier[5]	Varchar(80)	Optional – For Ids, Account Ids, etc.
26	UDF05_Identifier[5]	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[6]	Varchar(1)	Optional - used for Auto-splitting[6]
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 DEFINDED 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.

REPORTING BY USER DEFINED FIELDS

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

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!

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