
DOCMAIL REPORTING GUIDE

v2.0



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ALL ABOUT REPORTS

Within Docmail, there is built-in report functionality that allows account holders to run a variety of reports on their mailings and account usage. These reports can be run on specific dates and show the account holder a range of information depending on the report requested.

Why should I run reports?

The report functionality is a particularly useful tool when account holders require particular information about a mailing or about the account use. An example of this would be, monitoring the annual spend on your Docmail account for budget purposes.

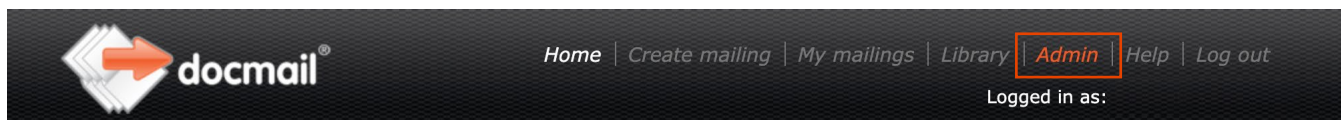
The system is designed so that you can run reports against various dates, allowing account holders to compare previous data with present account data.

Reports can be exported from Docmail into Excel, allowing you to filter the data as required and/or generate charts. This allows you to easily manage your communications, business strategies and budgets.

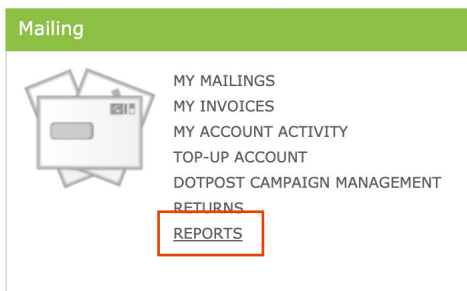
Mailing details can also only be kept on your Docmail account for 28 days. After this period all mailings, including data, are removed from your Docmail account to comply with GDPR legislation. The only information Docmail holds on your past mailings will be found by running reports.

How do I access the reporting function?

Once logged into our website, every Docmail user has an 'admin' section in the top right hand corner of their homepage.



Within here, under the 'mailing' section, there is a button named 'reports'.



HOW TO RUN A REPORT

When in the reporting section, you will see the below screen.

The reports that you can see in this screen will be the reports that you have run previously.

To run a report, you will need to click on 'Run new report'.

Run date	Report name	VIEW DETAILS
10/03/2021 11:38:46	Despatched mailings - User daily totals	VIEW DETAILS

You will then see the below screen.

Report options

Report: 1. Despatched mailings

Summarise: 2. User daily totals

Report name: 2. []

Run report: 3. Now


Dispatch date: 4. From [] to []

User: (all)

Back Generate report

1. Select the report you wish to run and the required summarisation from the drop down boxes.
2. You have the ability to name the report for your future reference, but this isn't required in order to run the report.
3. Chose 'now' to generate the report immediately. See page 6 to find out about scheduling reports.
4. Input the date range you wish to run the report against.

Once you have filled out each of the sections, click 'generate report', where you will then be taken to a screen like the one below.



VIEW REPORT DETAILS

RENAME

Report	Despatched mailings - User daily totals	
Summarise	User daily totals	
Run date	06/05/2021 08:58:44	
Filters	Filter	Value
	Despatch date	Between 04/01/2021 and 28/04/2021
Row count	2	

[Delete](#) [Back](#) [Download](#) [View data](#)

From here, you can either view your data online by selecting 'view data', or you can click the 'download' button which will download the data in an excel document.

Please note that reports that contain fewer than 1000 rows of data can be viewed on screen, however larger datasets must be exported to excel, via the download button.

SCHEDULING REPORTS

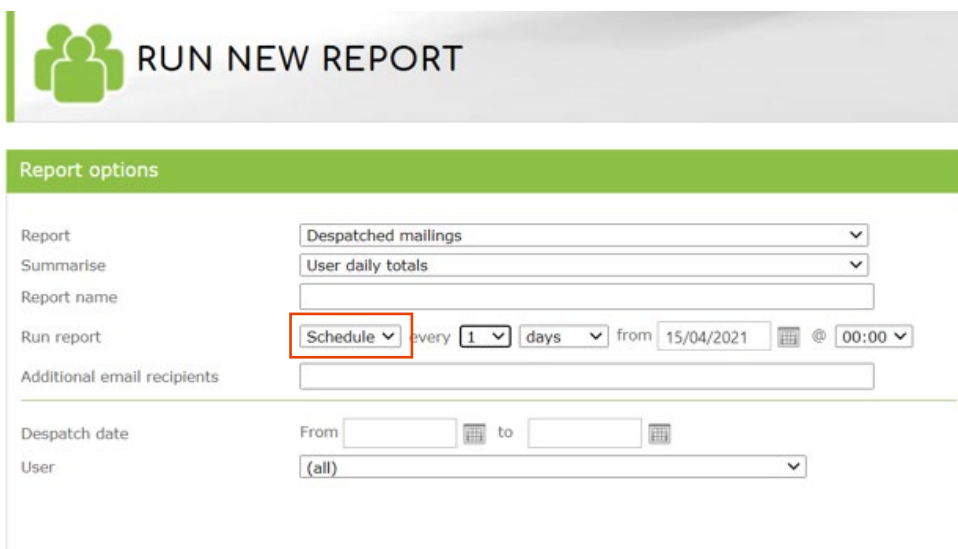
When running reports, you also have the option to schedule them. This means that you are able to input into the system what information you would like and how often you would like to receive it, where it will then be automatically generated and emailed to you and any other recipients you'd like to be included.

This is particularly beneficial to those who regularly require information regarding their account or mailings, as it saves valuable time by automatically running these reports for you and conveniently dropping them directly into your inbox.

Note: Scheduled reports can only be viewed by docmail users and cannot be viewed by a non user if sent via email.

How to schedule a report

To schedule a report, you will need to ensure that the 'run report' option is selected as 'Schedule', as shown below.



The screenshot shows a web interface titled "RUN NEW REPORT" with a green header bar. Below the header is a "Report options" section with a green background. The form contains the following fields:

- Report: Despatched mailings (dropdown)
- Summarise: User daily totals (dropdown)
- Report name: (text input)
- Run report: Schedule (dropdown, highlighted with a red box) every 1 (dropdown) days (dropdown) from 15/04/2021 (calendar icon) @ 00:00 (dropdown)
- Additional email recipients: (text input)
- Despatch date: From (calendar icon) to (calendar icon)
- User: (all) (dropdown)

From here, you can choose how often the report is ran (by using the 2 boxes after 'every'). The options include from 1-24 in the first box and hours, days, weeks and months in the second box. You can then choose when the report begins (the date after the 'from') and at what time you would like the report to be generated. For example, you could run a despatched mailings report for overall monthly totals from the 1st January every, 4 weeks.

If you would like the report to be sent to other people too, then you can input their email addresses in the 'Additional email recipients' box and use semi-colons (;) to separate each email address.

The report will then be automatically run on your inputted date and time and emailed to you along with any other additional email addresses entered.

Please note that for scheduled reports date filters will automatically be moved forward, remaining relative to the first run date. When reports are re-run, they will be processed at the time first entered, so if you chose 2pm, the following report will be sent to you at 2pm.

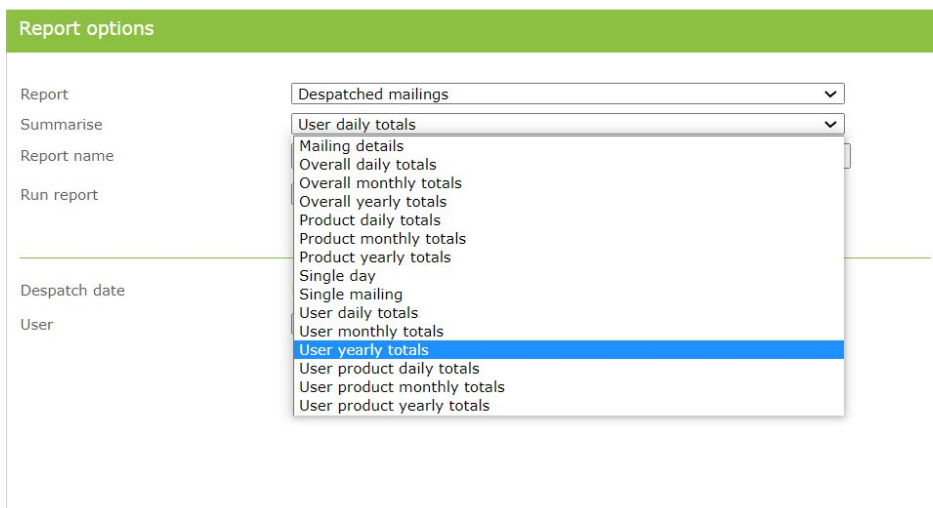
THE MOST USED REPORTS IN DETAIL:

The Docmail reporting suite gives you a range of different reports to choose from, which each provide different information in relation to your mailings.

Below are some of the most common report and summary combinations that are used within Docmail, as well as how these reports can be run, a brief description of the information they provide and their key benefits.

Despatched mailings reports

Despatched mailings reports, provide you with information on approved and paid for mailings. You can run the despatched mailing reports, against the below criteria shown in the 'summarise' dropdown box:



The screenshot shows a form titled "Report options" with a green header. The form contains several fields: "Report", "Summarise", "Report name", "Run report", "Despatch date", and "User". The "Summarise" dropdown menu is open, displaying a list of options. The "User yearly totals" option is highlighted in blue. The options in the dropdown are: "Mailing details", "Overall daily totals", "Overall monthly totals", "Overall yearly totals", "Product daily totals", "Product monthly totals", "Product yearly totals", "Single day", "Single mailing", "User daily totals", "User monthly totals", "User yearly totals", "User product daily totals", "User product monthly totals", and "User product yearly totals".

Mailing details

The 'mailing details' report provides information on orders that have been submitted within your Docmail account, over a pre-selected period.

The pre-selected period is set, prior to the report being ran, as shown below.

With orders remaining in Docmail for a period of 28 days, this report provides users with the ability to see detailed information, no personal data included, on mailings sent over the lifespan of the account.

To run this report, in the report drop down box select 'despatched mailings', and in the summarise drop down box choose 'mailing details'. You can then enter any date range, within a 31 day maximum period.

Report options

Report

Summarise

Report name

Run report

Despatch date From to

This report provides users with in-depth information on orders placed within an account.

The information in this report includes:

- The despatch date
- The order reference
- The mailing name
- The product type
- If it is colour
- If it is duplex
- The despatch type
- If despatch was chosen as 'ASAP'
- The envelope preference
- The payment type
- The mailing source (web or print driver)
- The address count
- The cheapest address count (no surcharges)
- Incomplete address count (surcharged addresses)
- Over seas address count
- The price- excluding VAT, the VAT amount and the price including VAT.



Daily, monthly and yearly overall totals

The daily, monthly and yearly overall user total reports, provide details of your overall mailing totals for the period you have selected. By running a report in this format, you will receive a summary of the mailings each user has sent, in a quick and efficient format.

To run these reports select the report box as 'despatched mailings' and the summarise as either 'User daily totals', 'user monthly totals' or 'user yearly totals', depending on the time frame you wish to review.

Report options

Report	<input type="text" value="Despatched mailings"/>
Summarise	<input type="text" value="Overall daily totals"/>
Report name	<input type="text"/>
Run report	<input type="text" value="Now"/>

Despatch date From  to 

These three reports are particularly useful for reviewing orders within your account and managing orders placed by different users.

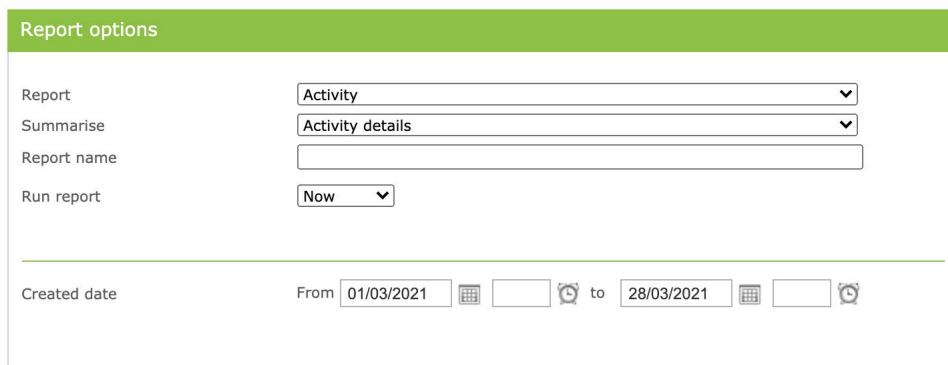
The information in these reports include:

- Despatch month
- Mailing count
- Address count
- Cheapest address count
- Incomplete address count (surcharges)
- Overseas address count
- Price ex VAT
- VAT amount
- Price inc VAT

Activity details

The activity report provides information on how credit within your account is being managed, including credit spent, credit added, cancelled mailings and user details.

To run this report, in the report drop down box select 'activity, and in the summarise drop down box choose 'activity details'. You can then enter any date range.



The screenshot shows a form titled "Report options" with a green header. It contains the following fields:

- Report: A dropdown menu with "Activity" selected.
- Summarise: A dropdown menu with "Activity details" selected.
- Report name: An empty text input field.
- Run report: A dropdown menu with "Now" selected.
- Created date: A date range selector with "From" and "to" labels. The "From" date is "01/03/2021" and the "to" date is "28/03/2021". Each date field has a calendar icon to its right.

The activity report is useful for managing the spend on your account.

The information in this report includes:

- Amount ex VAT
- Amount inc VAT
- Approved on
- Balance after
- Balance before
- Created date
- Invoice number
- Order reference
- Transaction reference
- Transaction Type
- VAT exempt amount
- VAT charged and VAT rate
- Non-despatched mailing details
- Invoicing reports

Non-despatched mailings details

The non-despatch mailings details report will provide you with information regarding your non-despatched mailings, which are any orders you have started but not approved or submitted.

To run this report, in the report drop down box select 'non-despatched mailings' and in the summarise drop down box choose 'mailing details'. You can then enter any date range. If you wish to find information regarding a particular order, then you can enter the order number in the 'order ref' box.

Report options

Report	<input type="text" value="Non-despatched mailings"/>
Summarise	<input type="text" value="Mailing details"/>
Report name	<input type="text"/>
Run report	<input type="text" value="Now"/>
Mailing status	<input type="text" value="Submitted"/>
Order ref	<input type="text"/>
Created date	From <input type="text"/> <input type="text"/> to <input type="text"/>
User	<input type="text" value="(all)"/>

By running this report, you are able to identify mailings that have not been despatched, helping with your mailing management. Within your account you can delete or submit these mailings.

The information in this report includes:

- Address count
- Cheapest address count
- Colour
- Created date
- Despatch ASAP
- Despatch Type
- Dotpost delivery
- Duplex
- Envelope preference
- Incomplete address count
- Mailing Dotpost enabled
- Mailing name
- Mailing Source
- Mailing status
- Mailing user Full name
- Mailing User Username
- Order reference
- Overseas address count
- Payment Type
- PO Ref
- Product Name
- Proof Sheet Count
- Submitted date
- Vat Amount

You also have the option to run the despatched mailings and non-despatched mailing reports via 'library link', which relates to items that you store in your library. The report can show you how often a library file has been used in mailings.

Invoicing reports

Invoicing is available to customers who meet a particular criteria. If this is something you are interested in, please contact the support team and they will be happy to help.

If your account is set to pay by invoice, you will be able to run reports for information on the invoices you are charged.

There are two different invoicing reports you can run.

Invoice details

The invoice details report, will show you a summary of each of your individual invoices. This report will breakdown each invoice for you, however you will not be provided with any information for the orders that fall under each invoice - for example you won't know how many recipients you had in an order.

To run this report, in the report drop down box select 'invoicing' and in the summarise drop down box choose 'mailing details'. You can then enter any date range, along with the option to put in a specific invoice number and the 'Paid state'.

Report options

Report	<input type="text" value="Invoicing"/>
Summarise	<input type="text" value="Invoice details"/>
Report name	<input type="text"/>
Run report	<input type="text" value="Now"/>

Invoice number	<input type="text"/>
Invoice date	From <input type="text"/> <input type="text"/> to <input type="text"/> <input type="text"/>
Invoice paid state	<input type="text" value="(all)"/>

This reports is particularly useful in managing payments as it allows you to keep on top of your paid and unpaid invoices.

The information in this report includes:

- Invoice number
- Invoice date
- Invoice period from
- Invoice period to
- Invoice amount VAT exempt
- Invoice amount ex VAT
- Invoice VAT amount
- Invoice amount inc VAT
- Paid?
- Amount paid

Invoice orders

The invoice orders report will show you all of your orders within your chosen date range and which invoice relates to your orders.

To run this report, in the report drop down box select 'invoicing' and in the summarise drop down box choose 'invoice orders'. You can then enter any date range, along with the option to search for a certain order or invoice in the relevant boxes.

Report options

Report	<input type="text" value="Invoicing"/>
Summarise	<input type="text" value="Invoice details"/>
Report name	<input type="text"/>
Run report	<input type="text" value="Now"/>

Invoice number	<input type="text"/>
Invoice date	From <input type="text"/> <input type="text"/> to <input type="text"/> <input type="text"/>
Invoice paid state	<input type="text" value="(all)"/>

This report is useful for your finance team if they need to check which invoices your orders are against.

The information in this report includes:

- Invoice number
- Order reference
- Despatch date
- Invoice amount ex VAT
- PO reference

CORPORATE STRUCTURES

If your account is set up with a corporate structure, you will also be able to run your despatched and non-despatched mailings by 'Corporate link'. Those who are setup with corporate structures can run reports relevant to their set up- eg if you've set up departments and budgets for each department.

If you require any additional information, or need some assistance, then our friendly customer service team will be more than happy to help. You can reach them on customersupport@cfh.com.



WWW.CFH.COM | WWW.DOCMAIL.CO.UK | WWW.DOTPOST.COM

RADSTOCK

St Peter's Park | Wells Road | Westfield | Radstock BA3 3UP | 01761 416311 | info@cfh.com

LIVINGSTON

Starlaw Business Park | Livingston EH54 8SF | 01506 462468 | information@cfh.com

WINDSOR

Unit 1, Windsor Trade Centre | Fairacres Industrial Estate | Windsor SL4 4LE | 0800 028 5967 | sales@print.uk.com