

MI Reporting Guide for Sales

To assist you with ensuring that we understand the reports which will benefit your customer, this document details the available reports from our MI reporting system and highlights the suggested user case for each.

Please do be mindful that providing reports just because they are there will not fulfil your customer's requirement and can cause dissatisfaction. Higher levels of customer satisfaction will be achieved by taking the time to understand their requirements and by matching a report to that,

Each report can be set as a subscription direct to your customer on a frequency that is correct for them.

Summary

Report Name	Area	Summary	Suggested Frequency	Suggested Time Report Is Generated	User Case
Details of Delivery	Delivery Management	Lists all consignments expected for delivery the previous day and details current status. Includes alternative customer reference field	Daily	07.00	Customers who wish to track and trace using the alternative customer reference field
Discrepancy	Delivery Management	Runs by collection date for the previous day and details all consignments which have discrepancies entered against them	Daily	08.30 and 10.30	
Previous Day IOND (information on no delivery)	Delivery Management	Details consignments with the selected IOND exceptions for the previous day	Daily	07.00	
Same Day IOND (information on no delivery)	Delivery Management	Details consignments with the selected IOND exceptions for the current day	Daily	11.00 and 14.00	Customers who will actively manage exceptions such as address query for B2C deliveries
Delivery Reconciliation Report (Transit)	Delivery Management	Rolling report of all consignments detailing current status and the previous event	Daily	10.30	Larger customer who wishes to track and trace all deliveries to conclusion
Unentered IOD/IOND (information on delivery/information on no delivery)	Delivery Management	Details consignments with no IOD/IOND exceptions for the previous day	Daily	07.00	
TPC	Collection Management	Details TPC's booked for collection the previous day and exception codes	Daily	07.00	Customers who are booking TPC's regularly
Customer Delivery Performance	Account Management	Details delivery performance for the chosen period	Monthly	07.00	
ETA	Account Management	Details ETA performance for the chosen period	Monthly	07.00	
Delivery List	Invoice Management	Runs by collection date for the previous day and lists	Daily	07.00	Customers who despatch from

		all consignments. The consignment price is also detailed.			multiple points or use a fulfilment house and do not collate manifests
Heavy Consignment Report	Invoice Management	Details consignments by delivery service which have been measured at a greater weight than the tolerance chosen. The 2 nd tab on the report lists the consignments	Weekly	07.00	Customers, such as resellers, who need to reconcile the charging by weight prior to invoice
Returns	Invoice Management	Lists all consignments for the previous 7 calendar days that have been returned and the reason for the return	Weekly	07.00	Customers who require record of all returns
Long Length	Invoice Management	Lists all consignments that have attracted the long length surcharge.	Weekly	07.00	Customers, such as resellers, who need to reconcile prior to invoicing.
Delivery Choice Report	Delivery Management	Coming soon	Weekly	07.00	
Reschedule Delivery Report	Delivery Management	Coming Soon	Weekly	07.00	

Requesting Reports

Please contact the Supervisor at the Customer Care Centre who will be managing your account detailing:

- a) The account number (s)
- b) The reports required
- c) The schedule for the reports
- d) The email address(s) for the reports to be sent to

All reports are sent from 'list_reportservices@ukmail.com'

Please remember if you provide your customer with any additional account numbers after the subscription to the reports are completed, you will need to inform the Supervisor and request the new account numbers to be added.

Visuals

Delivery Management

- Details of Delivery

The inclusion of the alternative customer reference field (customer reference number 2) allows customers to track and trace using this field as this is not commonly shown in the other reports.

Report Name: details of delivery.rdl
Account No: xxxxxxx
Collection Date: 22/02/2016
No Cons: 100
No Parcels: 120

Account	Customer Reference Number1	Customer Reference Number2	Delivery Address	Delivery Postcode	Service Name	Service Code	Consignment Collection Date	Consignee	POD Date	POD Signature	UK Mail Consignment Number	Weight	No of Items
xxxxxxx	7000001	7000002	The Street, The Town	SG20 1AA	Next Day	1	22/02/2016	Mr Smith	23/02/2016	Smith	43000000000001	5kgs	1
xxxxxxx	7000003	7000004	The Street, The Town	SG20 1AA	48 Hour	1	22/02/2016	Mr Brown			43000000000002	10kgs	2

- Discrepancy

The 08.30 report will provide a snapshot with the 10.30 providing the full discrepancy list as the network has until 10.30 to declare discrepancies. The 10.30 report will only show those discrepancies not detailed on the 08.30 report.

Discrepancy Report

Account	Customer Name	Service	Consignment Number	Parcel Number	Last Scan Date	Last Scan Time	Last Scan Type	Discrep Reason	Coll Date	Discrep Date	Discrep Time	Parcels	Delivery Due Date	Cust Ref1	Cust Ref2	Delivery Location	Delivery Postcode	Consignee
K000000	The Client	48 Hours	3000000000000000	1	22/09/2016	11:29	Discrepancy Scan	Held	21/09/2016	22/09/2016	11:29	1	23/09/2016	700000000	61416	Inverness	IV19 1AA	Mr Mein
		Next Day	936930500					Not Received	21/09/2016	22/09/2016	06:47	2	22/09/2016	700000001		Leicester	LE1 1AA	Mr Jones

- Previous Day IOND (information on no delivery)

This report can be configured to show only selected IOND exceptions or can show all exceptions.

Previous Day IOND

Account	Customer Name	Service	Phone Number	Consignment Number	Delivery Due Date	Parcel Number	Last Scan Date	Last Scan Time	Last Scan Type	POD Exception	POD Date	POD Time	Del	Parcels	Customer Reference1	Delivery Choice	Delivery Post Code	Consignee	Comment Type	Comments
K117109	TECH DATA LIMITED [TE1133]	48 Hours	0800 000 0000	3000000000000000	21/09/2016	439511670	19/09/2016	10:37	IOND Parcel Scan	Card Left	21/09/2016	10:37	No	2	700000000	YYY	IV18 0BE	Mr Brice		DOOR: BROWN
		Next Day	0800 000 0000	3000000000000001	21/09/2016	439845690	20/09/2016	01:50	Scanned into HoldBay - Rearranged Delivery	Book-In	21/09/2016	12:47	No	1	700000001	NYN	E16 2BG	Mr Smith		Awaiting Reference

- Same Day IOND (information on no delivery)

This report can be configured to show only selected IOND exceptions or can show all exceptions and is ideal for B2C customers who wish to actively monitor deliveries on the day of delivery.

This report can also be used to provide a list of consignments that have not been received from customer. This exception is applied at 12.30. The report can be configured to show for this exception code only and the suggested schedule time would be 13.00.

Same Day IOND

Account	Customer Name	Service	Phone Number	Consignment Number	Delivery Due Date	POD Exception	POD Date	POD Time	Del	Parcels	Last Scan Date	Last Scan Time	Last Scan Type	Customer Reference1	Delivery Choice	Delivery Post Code	Consignee	Comment Type	Comments
K000000	The Client	48 Hours	0800 000000	3000000000000011	23/09/16	Check Address	22/09/16	11:29	Held	1	22/09/2016	11:29	Discrepancy Scan	7083243492	YYY	IV19 1PW	Mr Brice		No Access
		Next Day	0800 000000	3000000000000012	21/09/16	Card Left	22/09/16	10:57	Unknown	1	22/09/2016	10:54	IOND Parcel Scan	7083140757	NYN	SK5 6EY	Mr Jones		5312879 white

- **Delivery Reconciliation**

This is the only report which details all consignments through to completion.

Transit Report

Account	Customer Name	Service	Phone Number	Consignment Number	Del Due Date	POD Signature	Last Exemption	Comments	POD Date	POD Time	Previous POD	Prev POD Date	Prev POD Time	Parcels	Del	Customer Reference1	Delivery Location	Consignee
K000000	The Client	48 Hours	0800 000000	31270270145225	15/09/2016	DUNKLEY			15/09/16	11:48	Card Left	14/09/16	00:46	2	Yes	70000000	Inverness	Mr Clark
		ND		31270270148494	20/09/2016	CHEYNE			20/09/16	18:47	Check Of Address	19/09/16	14:21	2	Yes	70000000	Inverness	Ms Cleghorn

- **Unentered IOD/IOND (information on delivery/information on no delivery)**

To be viewed in conjunction with the previous day IOND to provide a full picture of all consignments where there is not a complete IOD.

UnEntered IOD-IOND Report

Account Number	Customer Name	Service	Collected Date	Due Date	Delivery Location	Consignment Number	Parcels	Last Scan Date	Last Scan Time	Last Scan Type	Customer Reference	Discrepancy Reason	Consignee
K000000	The Client	48 Hours	21/09/2016	23/09/2016	Inverness	3000000000000	2	21/09/2016	23:19	In Collecting Warehouse Scan	70000000		Mr Farquhar
		Next Day	15/09/2016	22/09/2016	Thames Valley	3000000000001	1	15/09/2016	07:42	Onto Delivery Van Scan	700000001		Mr Clark

Collection Management

- **TPC's**

When generated for collection day + 2 days, this report will also include the delivery details for the TPC.

Third Party Collections Report

Account	Customer Name	Phone Number	Con Number	Orig Col Date	Act Col Date	Parcels	Customer Reference1	Col Location	POC Exception	Delivery Due Date	Delivery Location	Consignee	POD Exception	POD Date	POD Signature	Del	Comments
K000000	The Client	0800 0000000	90000000	22/09/2016	21/09/2016	0	70000000007	Inverness	Subcontractor Collection (ZoneC)	23/09/2016	Leicester					No	

Account Management

Customer Delivery Performance

This report will show you for the chosen period the performance for the customer's deliveries in total and broken down by delivery service. The report also categorises the delivery exceptions by customer and UK Mail at fault. The exceptions are listed on the second tab providing the customer the ability to review consignments that have not been delivered on the original delivery due date.

This report will enable you to analyse the cause of the exceptions and in most cases apply a resolution.

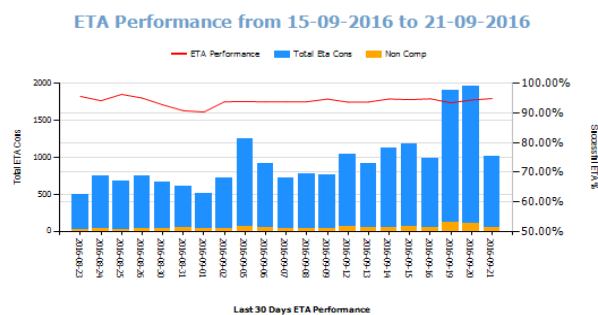
The report below has additional notes added to assist in understanding the layout.

Account Number:		Date From:	14/01/2016
National Acc Number:		Date To:	14/01/2016
Open Acc Number:		Number of Days:	0
Total Consignments:	175	Total Parcels:	175
Non UKM Exceptions:	4	Max Parcels/Con:	1
UKM Exceptions:	2	Max Weight/Con:	5
Delivery Performance %:	98.86%	Date Type Used:	Expected

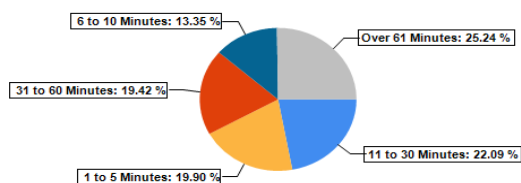
Exception Type	Exception Reason	Standard	Total	% Exceptions
		48 Hour	Next Day	
% of Service		57.71%	37.71%	
Total Consignments		104	71	175
Total Parcels		104	71	175
% of Successful	POD Failure	97.12%	95.77%	96.57%
Successful Deliveries		101	68	169
Total Non UKM Exceptions				
	19 Parcel(s) not Received from Customer	1		0.57%
	51 Check Of Address	1	1	1.14%
	52 Card Left	1		0.57%
Total UKM Exceptions		3	1	2.29%
	01 Not Received		1	0.57%
	02 Out Of Time		1	0.57%
			2	1.14%

ETA

This report contains a breakdown of the consignments that were delivered outside of the advised ETA by the number of minutes.



Non Compliant ETA breakdown



Invoice Management

- Delivery List

This report details consignment price, service, weight, items and consignee details.

Collection Date: 21 Sep 2016

No Cons: 1,102

No Parcels: 1,202

Consignment Number	Parcels	Weight	Col Date	Service	Product Type	Consignee	Collection Type Name	Delivery Address	Delivery Town	Delivery Postcode	Delivery Location	Customer Reference1	Customer Reference2	PODSignature	Comments
H000111 - The Client Location: Preston															
942179213	1	18	21-Sep-16	Next Day	Domestic	Mrs BOWEN-DAVIES	Third Party Carry Forward				Docklands	300000000000			NA
31238340750132	1	25	21-Sep-16	Next Day	HomeServe Sign Opt	Mr THOMSON	Adhoc				Gloucester	4000000000		Secure Location	2644201
2	2	43													

- Heavy Consignment

When requesting this report you will need to give a specified weight tolerance, the report will then show all consignments over this weight. The second tab of this report provides the consignment details

Heavy Consignment Report

Account: XXXXXX

Collection Date From: 26/02/2016

Collection Date To: 26/02/2016

Location: All

Weight (Kg)	Next Day No of Consignments	Next Day 12:00 No of Consignments	Saturday No of Consignments
56	2	0	0
41	1	0	0
34	1	0	0
28	3	0	0
25	1	0	0
24	1	0	0
18	1	0	0
16	2	0	0
14	1	1	1
12	2	0	1
11	1	0	0
Total	16	1	2

- Returns

This report can also be used for customers who may have a different returns address to their collection address as it enables all concerned to monitor returns.

Returns

Account Number	Customer Name	Invoice Name	Original Collection Date	Original Consignment Delivery Due Date	Original POD Delivery	Original Recipient Failure	Original Delivery Postcode	Original Consignment Number	Return Consignment Number	Return Collection Date	Return Consignment Delivery Due Date	Return Pod Delivery Date	Return Delivery Postcode	Return Recipient Failure
XXXXX	The Customer	The Customer	15/02/2016	16/02/2016	16/02/2016	04RTS/TPC	M4-DWE	3000000000000002	90000004	19/02/2016	22/02/2016	22/02/2016	LE16 1AA	Newbery

- Long Length Surcharge

This report can be used by clients that may be resellers or whom want to pass the charge onto their customers; this will enable the charges to be advised prior to invoice receipt.

Long Length Verification Report																
Account Number	Open Account Number	National Account Number	Trading Name	Consignment Number	Collection Date	Invoice Date	Invoice Number	Gross Price	Long Length Surcharge	Long Items	Invoiced Weight	Parcel Number	Parcel Weight	Parcel Height	Parcel Length	Parcel Width
K000005	TR0000	0	Smith & Co	3*****	20/09/2016			£14.35	£10.00	1	20	1	0	8	121	88
												2	10	55	46	23