Return Mail Services

User Guide

RICOH
imagine. change.

Return Mail Services

RMS

RMS User Guide

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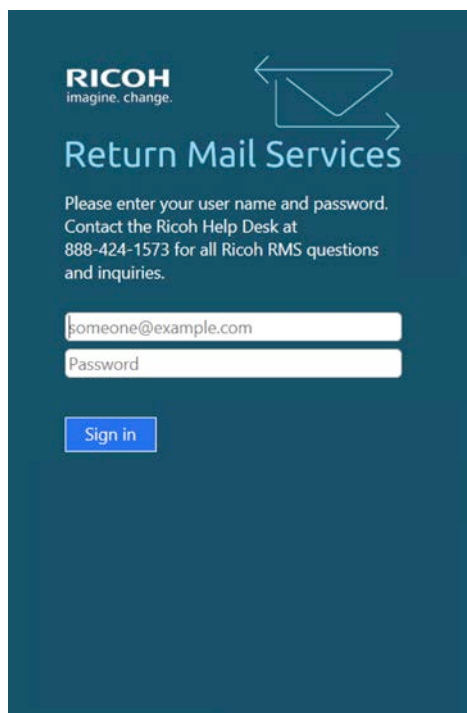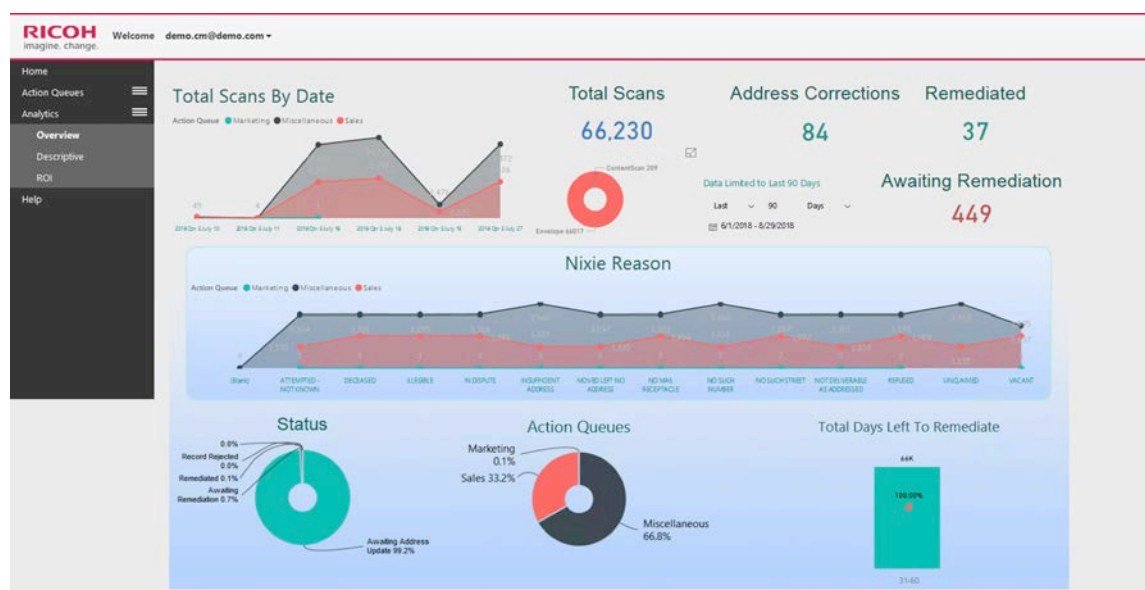
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Login

Standard user/group based authentication that can be managed by Ricoh. For the purpose of RMS Ricoh restrictions will control:

- Permission to accept new addresses
- Permission to update status remediated
- Permission to view one or many Action queues (this permission will also control the data displayed in the dashboard view)
- Permission to export remediated records
- Permission to forward images to another department

Supported roles:
- Customer Manager
- Customer Associate

Default Home Screen – Overview for Desktop and Tablet

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Analytics – Navigation Controls - mouse click required

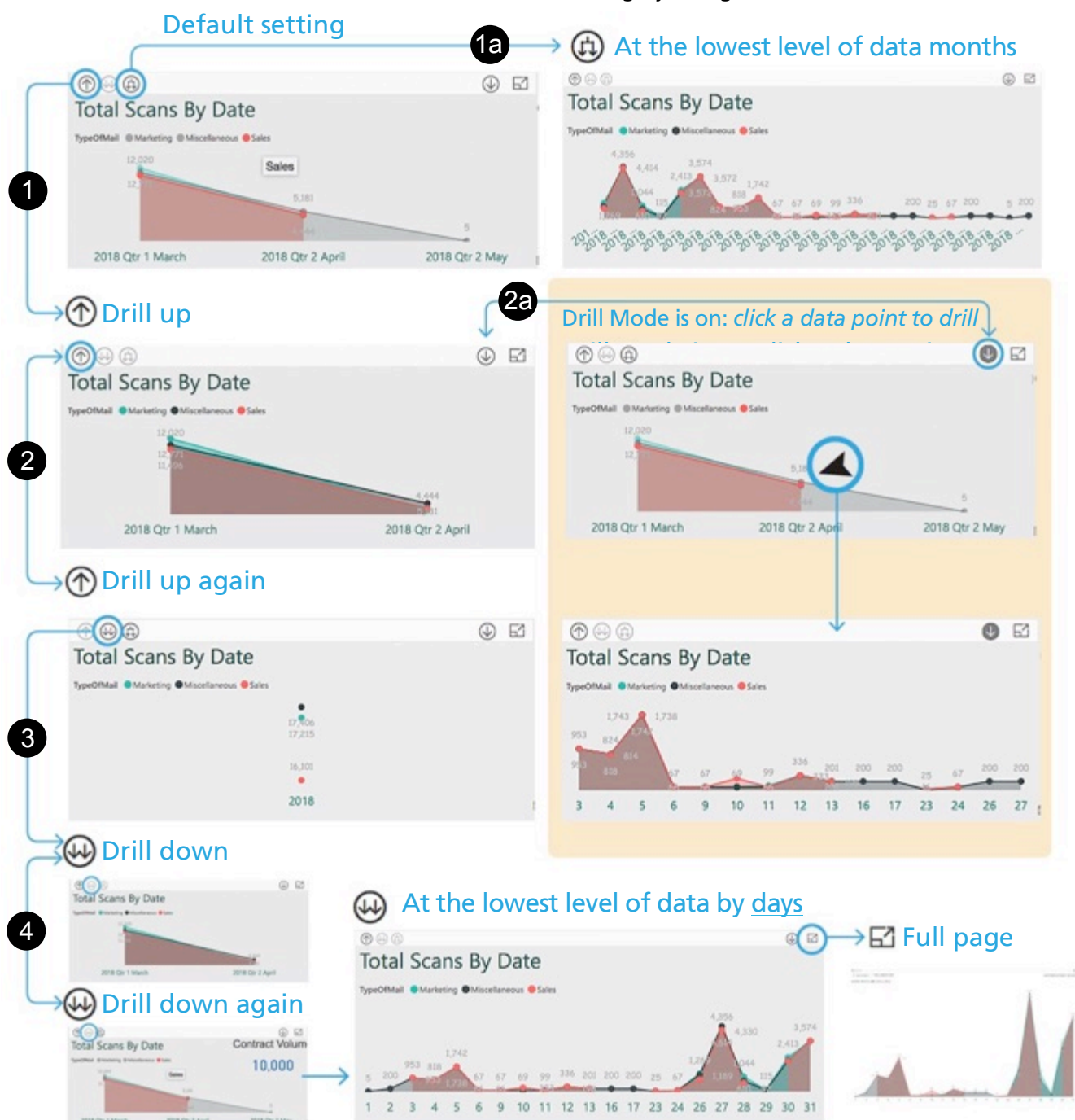Analytics – Tablet Controls - a stylist is recommended for full experience

⬆ Drill Up

⬇ Click to turn on Drill Down

⤓ Go to the next level in the hierarchy

🔲 Focus mode

⤋ Expand all down one level in hierarchy

To reset Analytics grid simply
Click on current Action Queue button
Or grey background.

Default setting

1a → At the lowest level of data months

1

Total Scans By Date

TypeOfMail ● Marketing ● Miscellaneous ● Sales

Total Scans By Date

TypeOfMail ● Marketing ● Miscellaneous ● Sales

⬆ Drill up

2a

2

Total Scans By Date

TypeOfMail ● Marketing ● Miscellaneous ● Sales

Drill Mode is on: *click a data point to drill*

Total Scans By Date

TypeOfMail ● Marketing ● Miscellaneous ● Sales

⬆ Drill up again

3

Total Scans By Date

TypeOfMail ● Marketing ● Miscellaneous ● Sales

2018

Total Scans By Date

TypeOfMail ● Marketing ● Miscellaneous ● Sales

⤓ Drill down

4

Total Scans By Date

⤓ At the lowest level of data by days

Total Scans By Date

TypeOfMail ● Marketing ● Miscellaneous ● Sales

🔲 Full page

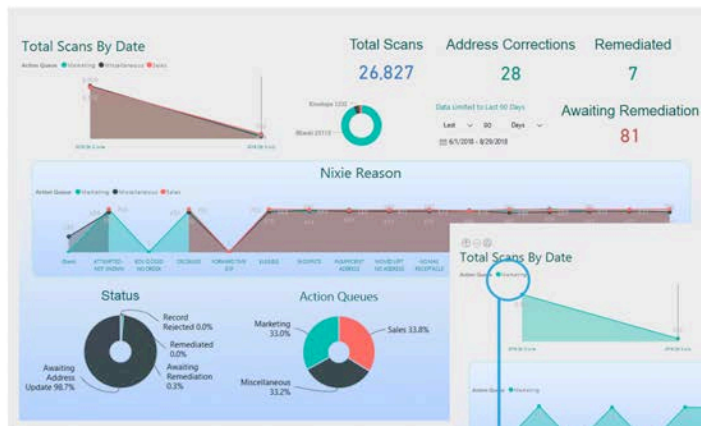⤓ Drill down again

Total Scans By Date
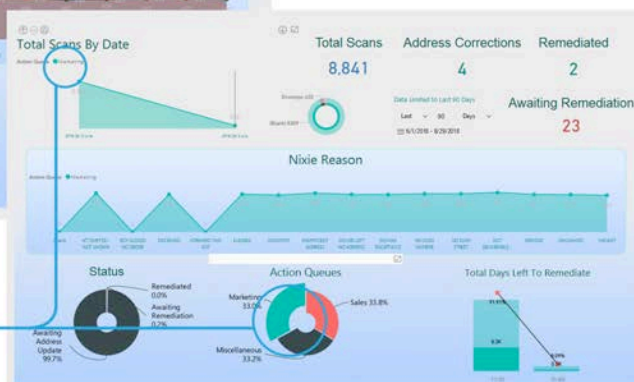
Contract Volum
10,000

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Analytics – Action Queues Navigation Controls Mouse click required

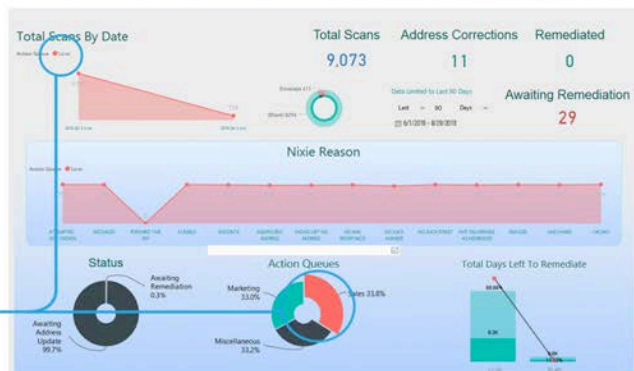● Marketing   ● Miscellaneous   ● Sales

Default Home Screen

Action Queues drill down

● Marketing
    left navigation buttons to display
    single department analytics.

● Sales
    left navigation buttons to display
    single department analytics.

● Miscellaneous
    left navigation buttons to display
    single department analytics.

Hold command to multiple select Action Queues   or   ● Marketing ● Miscellaneous ● Sales

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Action Queues – RMS Document Status Column Definitions

Remediated
Address was fixed and an *updated address* was provided

Awaiting Remediation
Waiting for Managed Services and Validation Services

Awaiting Address Update
In process of updating

Record Rejected
When an address is deemed incompatible by Managed Services and Validation Services the record will be "Rejected"

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Action Queues – Awaiting Remediation Button

Document Libraries with filters for Manually Confirm Remediation
or Reject Record:

Once remediated, the information will be moved to the Remediate
or Rejected *Document Status* library

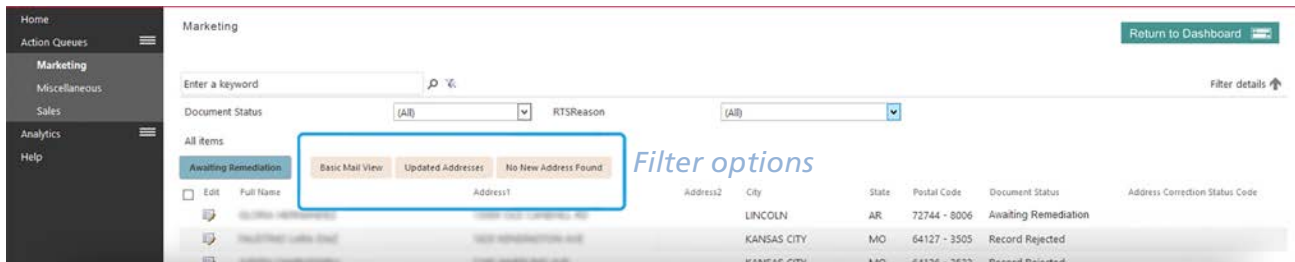*Manually Confirm Remediation or Reject Record*

*Click check box
to select choice*

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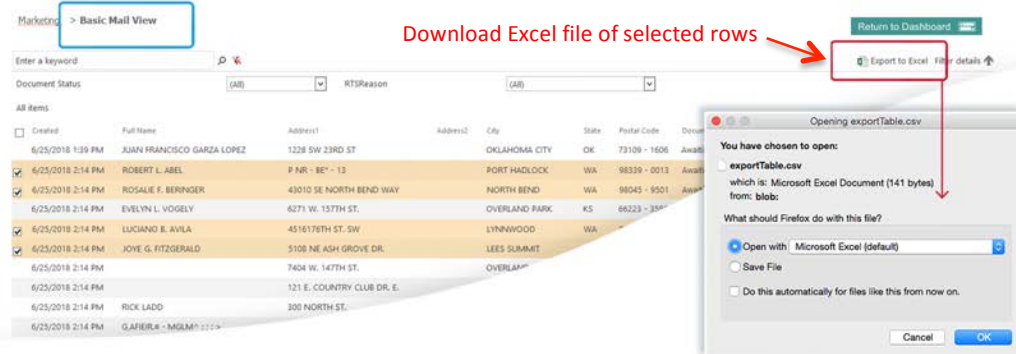
Action Queues – Section Filter Buttons

Document Libraries with filters for:
-Basic Mail View
-Updated Addresses
-No New Address Found

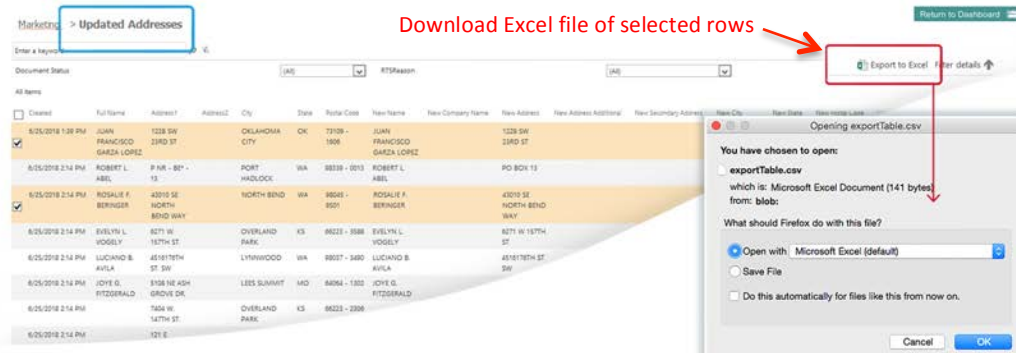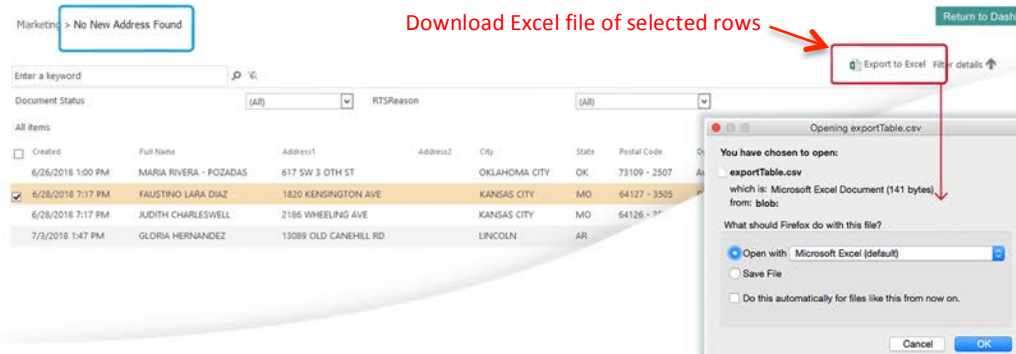*Filter options*

Filter option

Click check box to select choice

Download Excel file of selected rows

Filter option

Download Excel file of selected rows

Filter option

Download Excel file of selected rows

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Action Queues – Main Dashboard Filter

Document Libraries with filters for:

-RTS NIXIE reason   -Name & Address search
-New address found/not found   -Action Queue (if more than one)
-Status   -Date Range

Document Status

✓ (All)
Remediated
Awaiting Address Update
Awaiting Remediation
Record Rejected

RTS Reason (Nixie Label)

✓ (All)
ATTEMPTED - NOT KNOWN
BOX CLOSED
BOX CLOSED NO ORDER
DECEASED
FORWARD
FORWARD TIME EXP
ILLEGIBLE
IN DISPUTE
INSUFFICIENT ADDRESS
MOVED LEFT NO ADDRESS
NO MAIL RECEPTACLE
NO MAIL RECEPTICLE
NO SUCH NUMBER
NO SUCH STREET
NOT DELIVERABLE AS ADDRESSED
REFUSED
TEMPORARILY AWAY
UNCLAIMED
VACANT

Return to Overview Analytics

Action Queue menu navigational breadcrumbs

Enter a keyword and hit ENTER to search this list.

Filter Details hides menu

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Action Queues – Content Editor   📝 *Click on icon to open the editor window*

User can edit content based on access level

- Enter a new address against an image and if available in the customer's service offering.
- View NCOA/PCOA address
- View the captured image
- Based on user privilege, update the information data captured by OCR.
- Forward an image to another Action Queue Library

📝 *Click on icon to open the editor window*

Action Queue - Forward an image to another Action Queue Library

Document Status - address found by the NCOA/PCOA process

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Analytics – Overview Dashboard

Dashboard providing customers with analytical data to better understand RTS mail and trends that are occurring.

The dashboard is an interactive page that provides the customer with real time data on the activity of RTS mail within whatever locations it is being scanned in.

1. Total Scans By Date, Default login view is month to date
2. Total Scans
3. Address Corrections
4. Remediated - Address correction against received RTS Mail
5. Reset – select Action Queues buttons to reset

6. Content Scan / Envelope
7. Date Filter
8. Awaiting Remediation
9. NIXIE Reason Breakdown
10. Address Status
11. Action Queues
12. Total days left to remediate.

TypeOfMail ● Marketing ● Miscellaneous ● Sales
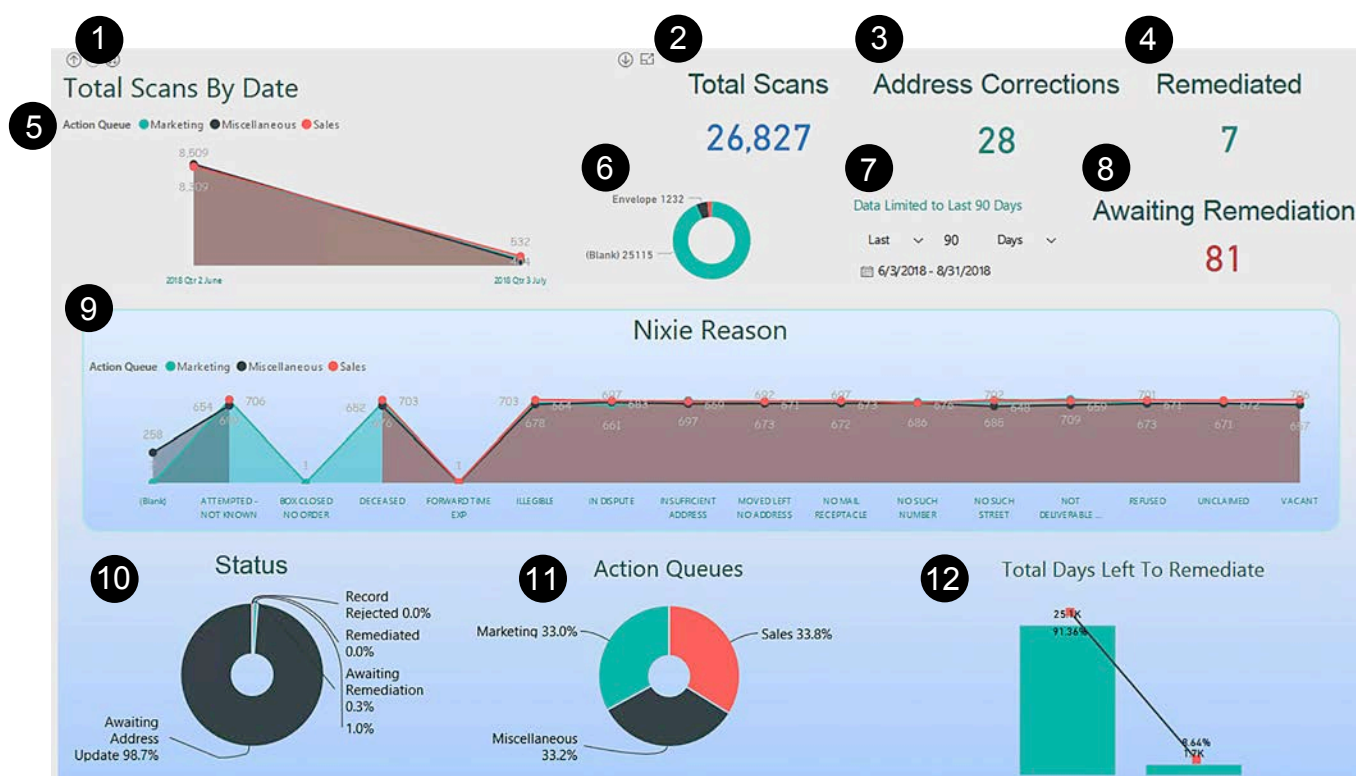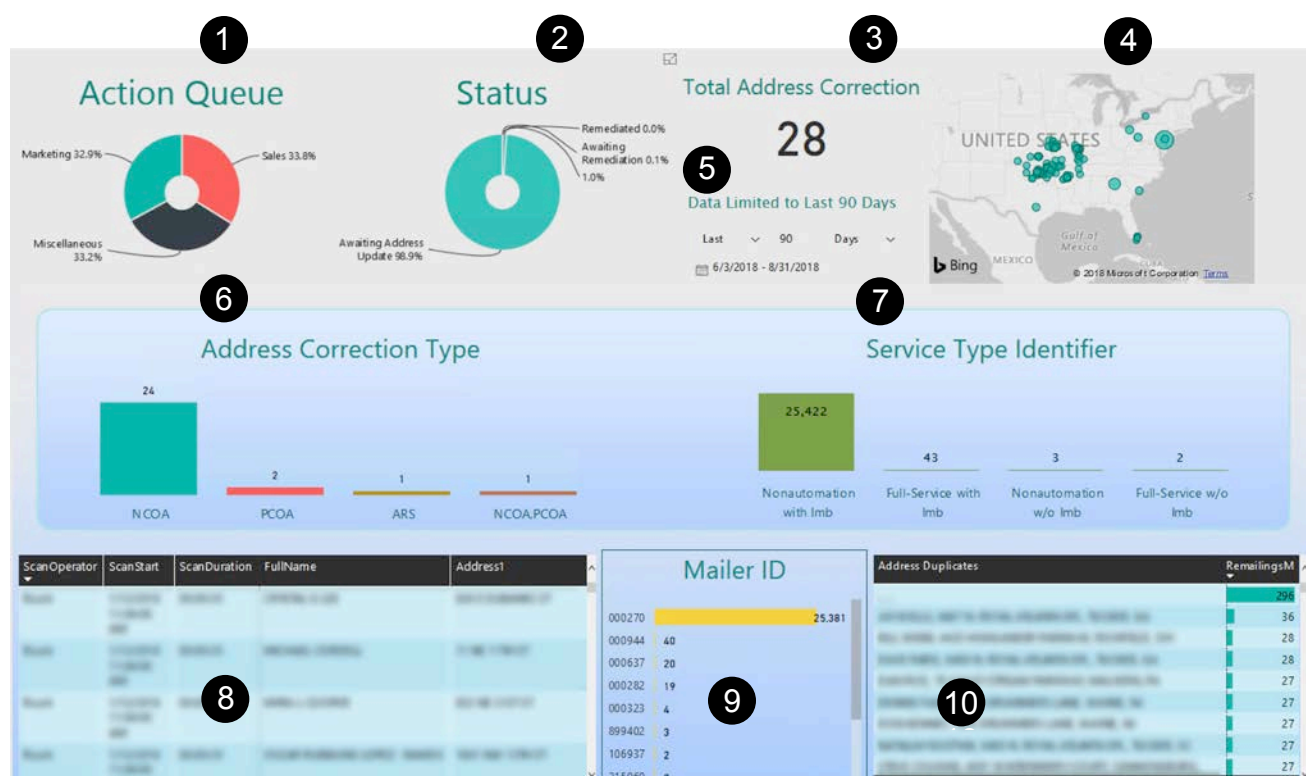
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Analytics – Descriptive Dashboard

Dashboard providing customers with analytical data to better understand RTS mail and trends that are occurring.

The dashboard is an interactive page that provides the customer with real time data on the activity of RTS mail within whatever locations it is being scanned in.

1. Action Queues - Summary of the Executed business rules and assigned action queues as well as open items and their time to process.
2. Status of all scans
3. Total address correction
4. Map locator
5. Date Filter
6. Address correction type
7. Service type identifier

8. Full Name, Address, New Address, New City, New Postal Code, and New State
9. Mailer ID - if customer uses them to mailing out - the Returned Mail can help understand if Mailer is cleansing addresses before sending out - depends on if customer is paying for the cleansing service.
10. Breakdown of received pieces where individuals have been mailed more than once
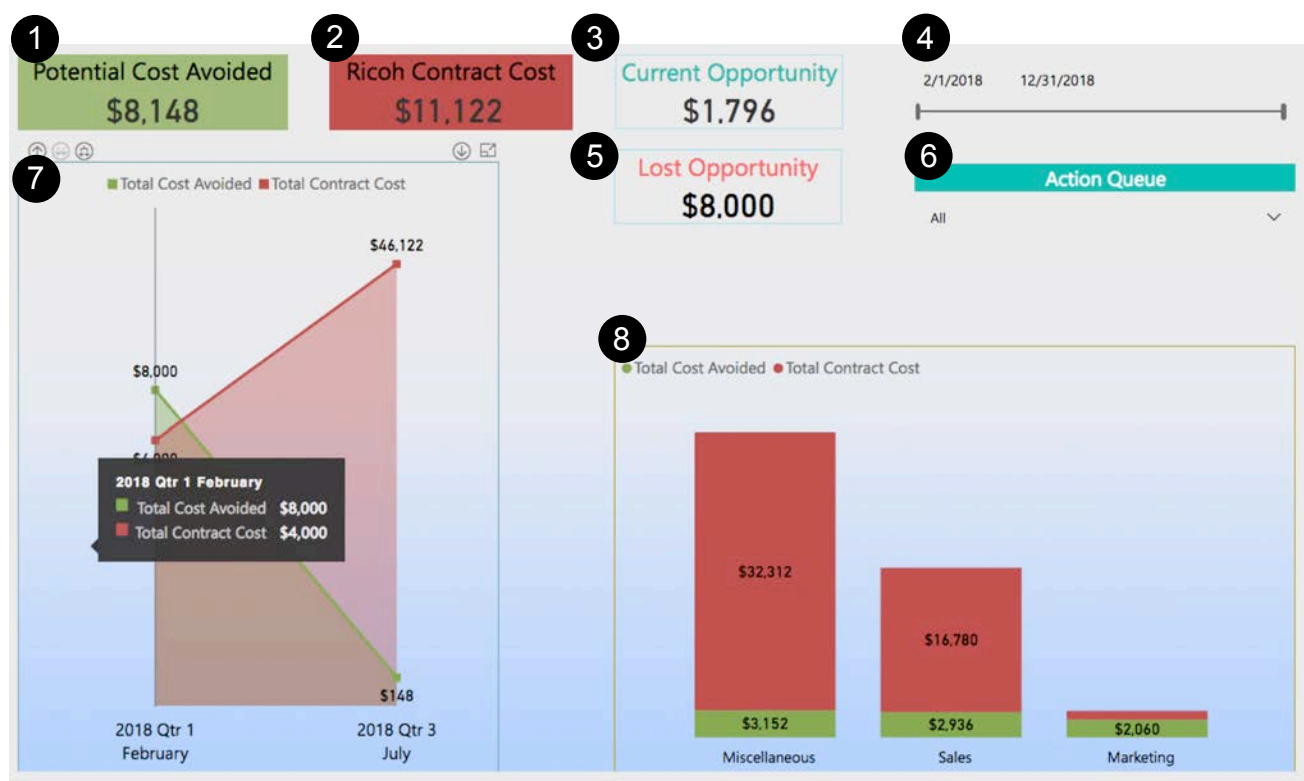
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Analytics – ROI Dashboard

The Return on the Investment calculator is a summary on how Ricoh has helped save the customer money by correcting, finding and remediating RTS mail.

Calculates the return on investment to date for processed RTS mail

1. Potential Cost Avoided
2. Ricoh Contract Cost
3. Current Opportunity
4. Date slider
5. Lost Opportunity

6. Individual action queue dropdown
7. Ricoh contract vs potential ROI visual comparison
8. Cost avoided vs Ricoh contract cost per action queue visual comparison

Notes