

Return Mail Services

User Guide

RICOH
imagine. change.

Return Mail
Services

RMS



RMS User Guide

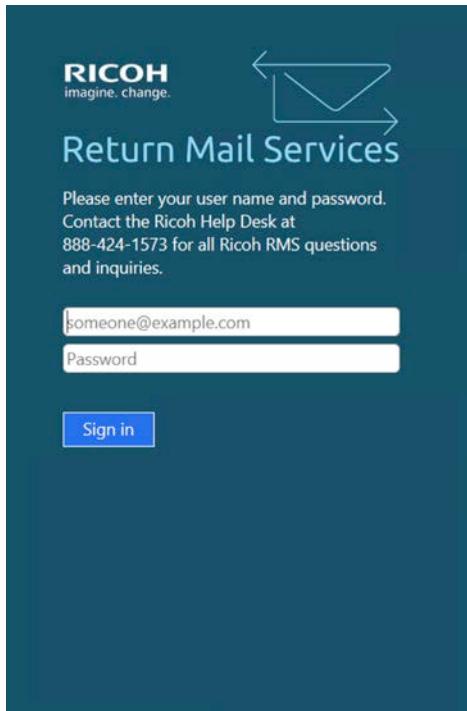
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1 Return Mail Services

Login



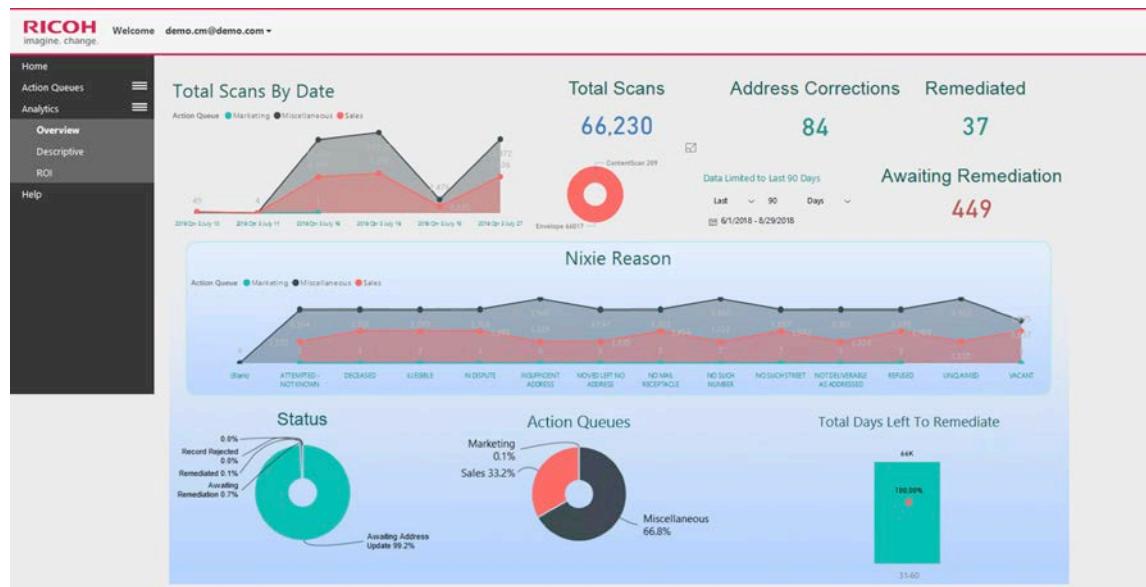
Standard user/group based authentication that can be managed by Ricoh. For the purpose of RMS Ricoh restrictions will control:

- 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

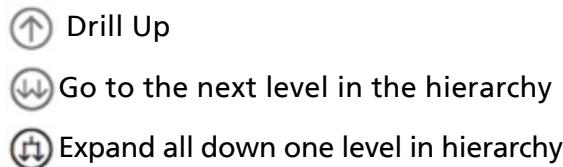
Default Home Screen – Overview for Desktop and Tablet



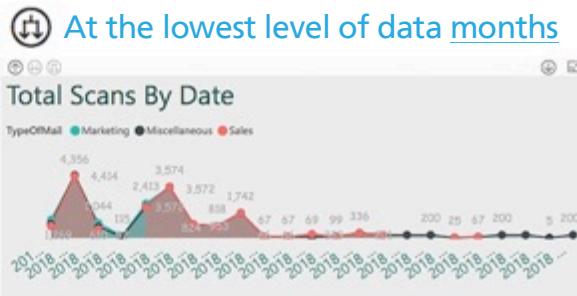
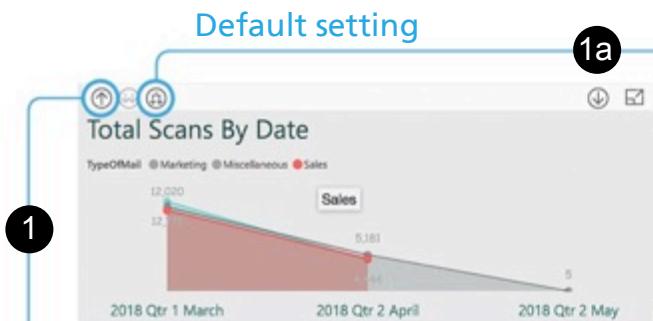
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Analytics – Navigation Controls - mouse click required

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



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

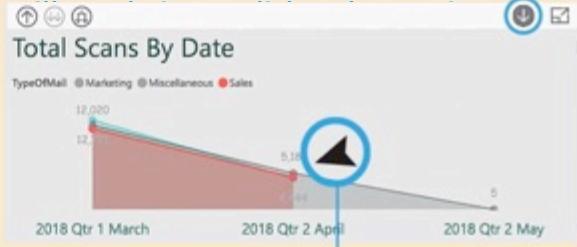


→  Drill up



2a

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



→ Drill up again



Drill down



At the lowest level of data by days



→ Full page

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Analytics – Action Queues Navigation Controls [Mouse click required](#)



Marketing

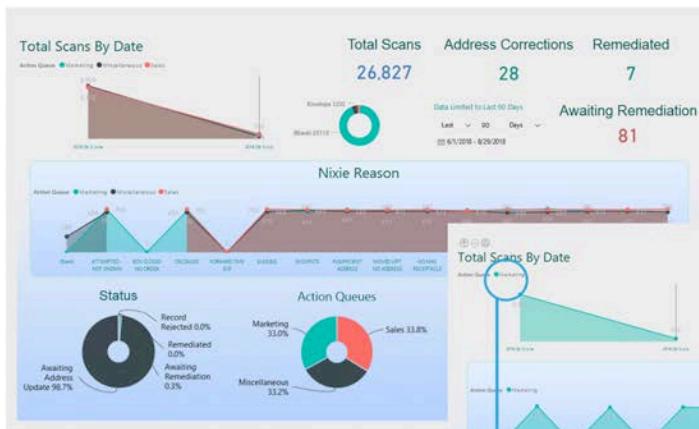


Miscellaneous

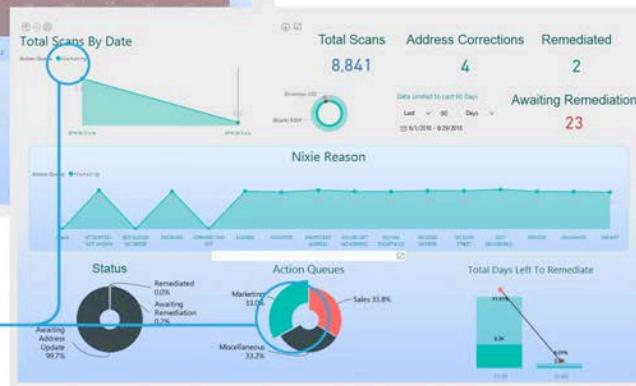


Sales

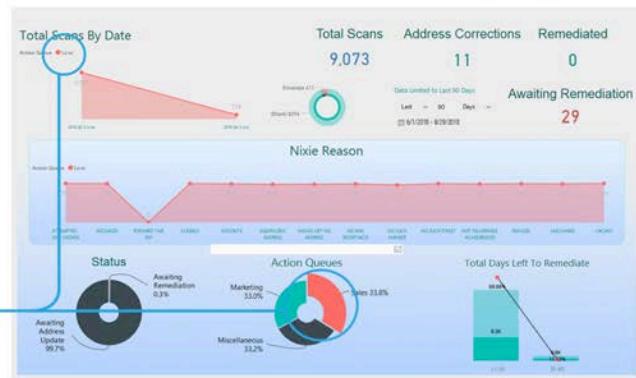
Default Home Screen



Action Queues drill down



left navigation buttons to display single department analytics.



left navigation buttons to display single department analytics.



left navigation buttons to display single department analytics.

Hold command to multiple select Action Queues



or



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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”

The screenshot shows the RMS Action Queues interface for the Marketing department. The left sidebar lists Home, Action Queues, Marketing, Miscellaneous, Sales, Analytics, and Help. The main area is titled 'Marketing' with a 'Return to Dashboard' button. It features a search bar and filters for 'Document Status' (All), 'RTSReason' (All), and 'Address1' (Enter a keyword). The 'All items' section shows a list of 20 items, each with a thumbnail, full name, address, and status. The 'Status' column for these items includes 'Remediated', 'Awaiting Address Update', 'Awaiting Remediation', 'Record Rejected', and 'Remediated'. To the right, a table titled 'Document Status' lists the same categories with corresponding status codes: 'Remediated' (Status Code: 1), 'Awaiting Address Update' (Status Code: 2), 'Awaiting Remediation' (Status Code: 3), 'Record Rejected' (Status Code: 4), and 'Remediated' (Status Code: 5). The 'Remediated' status in the table is circled with a magnifying glass.

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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

Marketing

Enter a keyword

Document Status: (All) RTSReason: (All)

Address1 Address2 City State Postal Code Document Status Address Correction Status Code

Address1	Address2	City	State	Postal Code	Document Status	Address Correction Status Code
1000-102 CARRIAGE RD		LINCOLN	AR	72744 - 8006	Awaiting Remediation	
1000-102 CARRIAGE RD		KANSAS CITY	MO	64127 - 3505	Record Rejected	
1000-102 CARRIAGE RD		KANSAS CITY	MO	64126 - 2522	Record Rejected	
1000-102 CARRIAGE RD		YUKON	OK	73099 - 2928	Awaiting Address Update	
1000-102 CARRIAGE RD		KANSAS CITY	KS	66101 - 3628	Remediated	
1000-102 CARRIAGE RD		NEWCASTLE	OK	73065 - 0995	Awaiting Address Update	

Manually Confirm Remediation or Reject Record

Enter a keyword

Document Status: (All) RTSReason: (All)

Address1 Address2 City State Postal Code Document Status Accept New Address New Name New Company Name New Address New Address Add

Address1	Address2	City	State	Postal Code	Document Status	Accept New Address	New Name	New Company Name	New Address	New Address Add
1228 SW 23RD ST		OKLAHOMA CITY	OK	73109 - 1606	Awaiting Remediation	Yes	JUAN FRANCISCO GARZA LOPEZ		1228 SW 23RD ST	
P NR - BEY - 13		PORT HADLOCK	WA	98339 - 0013	Awaiting Remediation	Yes	ROBERT L. ABEL		PO BOX 13	
43010 SE NORTH BEND WAY		NORTH BEND	WA	98045 - 9501	Awaiting Remediation	Yes	ROSLIE F. BERNINGER		43010 SE NORTH BEND WAY	

3a

3b

Click check box to select choice

Remediate Selected Reject Selected

Remediate Selected Reject Selected

Confirm Approval

OK

Cancel

Operation Completed

Prevent this page from creating additional dialogs

OK

Confirm Rejection

OK

Cancel

Operation Completed

Prevent this page from creating additional dialogs

OK

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Action Queues – Section Filter Buttons

Document Libraries with filters for:

- Basic Mail View
- Updated Addresses
- No New Address Found

Filter option

Marketing > Basic Mail View

Enter a keyword:

Document Status: (All) RTSReason: (All)

All Items

Awaiting Remediation Basic Mail View Updated Addresses No New Address Found

Address1: Address2: City: State: Postal Code: Document Status: Address Correction Status Code:

Filter options

Created	Full Name	Address1	Address2	City	State	Postal Code	Document Status	Address Correction Status Code
6/25/2018 1:39 PM	JUAN FRANCISCO GARZA LOPEZ	1228 SW 23RD ST		OKLAHOMA CITY	OK	73109 - 1606	Awaiting Remediation	
6/25/2018 2:14 PM	ROBERT L. ABEL	P MR - BE* - 13		PORT HADLOCK	WA	98339 - 0013	Awaiting Remediation	
6/25/2018 2:14 PM	ROSALE F. BERNINGER	43010 SE NORTH BEND WAY		NORTH BEND	WA	98045 - 9501	Awaiting Remediation	
6/25/2018 2:14 PM	EVELYN L. VOGELY	6271 W. 157TH ST.		OVERLAND PARK	KS	66223 - 3581	Awaiting Remediation	
6/25/2018 2:14 PM	LUCIANO B. AVILA	4516176TH ST. SW		LYNNWOOD	WA	98036 - 3581	Awaiting Remediation	
6/25/2018 2:14 PM	JOYE G. FITZGERALD	5108 NE ASH GROVE DR.		LEES SUMMIT	MO	64127 - 3505	Record Rejected	
6/25/2018 2:14 PM		7404 W. 147TH ST.		OVERLAND				
6/25/2018 2:14 PM		121 E. COUNTRY CLUB DR. E.						
6/25/2018 2:14 PM	RICK LADDO	300 NORTH ST.						
6/25/2018 2:14 PM	GAFERLA - MOLM	121 E.						

Download Excel file of selected rows

Filter option

Marketing > Updated Addresses

Enter a keyword:

Document Status: (All) RTSReason: (All)

All Items

Created Full Name Address1 Address2 City State Postal Code New Name New Company Name New Address New Address Additional New Secondary Address New City New State New Name Line

Created	Full Name	Address1	Address2	City	State	Postal Code	New Name	New Company Name	New Address	New Address Additional	New Secondary Address	New City	New State	New Name Line
6/25/2018 1:39 PM	JUAN FRANCISCO GARZA LOPEZ	1228 SW 23RD ST		OKLAHOMA CITY	OK	73109 - 1606	JUAN FRANCISCO GARZA LOPEZ		1228 SW 23RD ST					
6/25/2018 2:14 PM	ROBERT L. ABEL	P MR - BE* - 13		PORT HADLOCK	WA	98339 - 0013	ROBERT L. ABEL		PO BOX 13					
6/25/2018 2:14 PM	ROSALE F. BERNINGER	43010 SE NORTH BEND WAY		NORTH BEND	WA	98045 - 9501	ROSALE F. BERNINGER		43010 SE NORTH BEND WAY					
6/25/2018 2:14 PM	EVELYN L. VOGELY	6271 W. 157TH ST.		OVERLAND PARK	KS	66223 - 3581	EVELYN L. VOGELY		6271 W. 157TH ST.					
6/25/2018 2:14 PM	LUCIANO B. AVILA	4516176TH ST. SW		LYNNWOOD	WA	98036 - 3581	LUCIANO B. AVILA		4516176TH ST. SW					
6/25/2018 2:14 PM	JOYE G. FITZGERALD	5108 NE ASH GROVE DR.		LEES SUMMIT	MO	64127 - 3505	JOYE G. FITZGERALD							
6/25/2018 2:14 PM		7404 W. 147TH ST.		OVERLAND	KS	66223 - 3581								
6/25/2018 2:14 PM		121 E.												

Download Excel file of selected rows

Filter option

Marketing > No New Address Found

Enter a keyword:

Document Status: (All) RTSReason: (All)

All Items

Created Full Name Address1 Address2 City State Postal Code RTSReason Document Status

Created	Full Name	Address1	Address2	City	State	Postal Code	RTSReason	Document Status
6/26/2018 1:00 PM	MARIA RIVERA - POZADAS	617 SW 3 OTH ST		OKLAHOMA CITY	OK	73109 - 2507		Awaiting Remediation
6/28/2018 7:17 PM	FAUSTINO LARA DIAZ	1820 KENSINGTON AVE		KANSAS CITY	MO	64127 - 3505		Awaiting Remediation
6/28/2018 7:17 PM	JUDITH CHARLESWELL	2186 WHEELING AVE		KANSAS CITY	MO	64126 - 3505		Awaiting Remediation
7/3/2018 1:47 PM	GLORIA HERNANDEZ	13089 OLD CANCELL RD		LINCOLN	AR			

Download Excel file of selected rows

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Action Queues – Main Dashboard Filter

Document Libraries with filters for:

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

Document Status

(All) Remediated
Awaiting Address Update
Awaiting Remediation
Record Rejected

(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

Enter a keyword and hit ENTER to search this list.

Action Queue menu navigational breadcrumbs

Filter Details hides menu

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

Enter a keyword and hit ENTER to search this list.

Action Queue menu navigational breadcrumbs

Filter Details hides menu

Return to Overview Analytics

Filter Details hides menu

Marketing

Document Status
(All)
RTSReason
(All)

All Items

Awaiting Remediation

Basic Mail View

Updated Addresses

No New Address Found

Full Name	Address1	Address2	City	State	Postal Code	Document Status	Address Correction Status Code
SCOTTIE HARRIS	1000 E 10TH ST		LINCOLN	AR	72744 - 8006	Awaiting Remediation	
TRAVIS LEE JONES	1000 E 10TH ST		KANSAS CITY	MO	64127 - 3505	Record Rejected	
ADRIEN CHARLES	1100 E 10TH ST		KANSAS CITY	MO	64126 - 2522	Record Rejected	
THOMAS REEDER	1000 E 10TH ST		YUKON	OK	73099 - 2928	Awaiting Address Update	
VECTOR RACHAEL	1000 E 10TH ST		KANSAS CITY	KS	66101 - 3628	Remediated	
SHANE MAYER	1000 E 10TH ST		NEWCASTLE	OK	73065 - 0995	Awaiting Address Update	
ANNE HERRMANN	1000 E 10TH ST		TULSA	OK	74136 - 3821	Remediated	
SHANE HERRMANN	1000 E 10TH ST		TULSA	OK	74136 - 3821	Awaiting Address Update	
SHANICE D. MARCHAND	1000 E 10TH ST		BETHANY	OK	73008 - 6156	Awaiting Remediation	
DEON J. STAFF	1000 E 10TH ST		TULSA	OK	74116 - 3009	Awaiting Address Update	
CHARLES BLAULICH	1000 E 10TH ST		KIEFER	OK	74041 - 4401	Awaiting Remediation	
SCOTT LARSON	1000 E 10TH ST		OKLAHOMA CITY	OK	73114 - 4008	Awaiting Address Update	
DARRELL D. COBB	1000 E 10TH ST		OKLAHOMA CITY	OK	73107 - 3805	Awaiting Address Update	
SEANURE DIXON	1000 E 10TH ST		TULSA	OK	74128 - 1241	Awaiting Address Update	
GARY WOODSON	1000 E 10TH ST		MARMADUKE	AR	72443 - 9207	Awaiting Address Update	
DELMARINA GOLSON	1000 E 10TH ST		OVERLAND PARK	KS	66212 - 1989	Awaiting Address Update	
HALDEN D. WADDELL	1000 E 10TH ST		OKLAHOMA CITY	OK	73114 - 5109	Awaiting Address Update	
DESPERADO RAGG	1000 E 10TH ST		KANSAS CITY	MO	64126 - 2446	Awaiting Address Update	
PRISCILLA DILLON	1000 E 10TH ST						

Analytics

Status

Action Queues

Total Days Left for Remediate

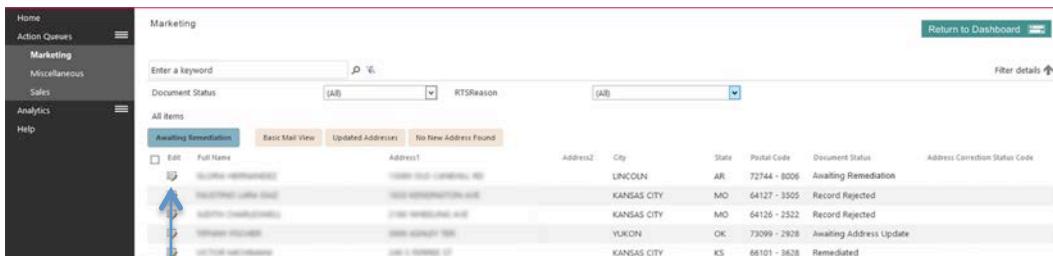
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Action Queues – Content Editor

 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



Marketing

Enter a keyword:

Document Status: (All) RTSReason: (All)

All items

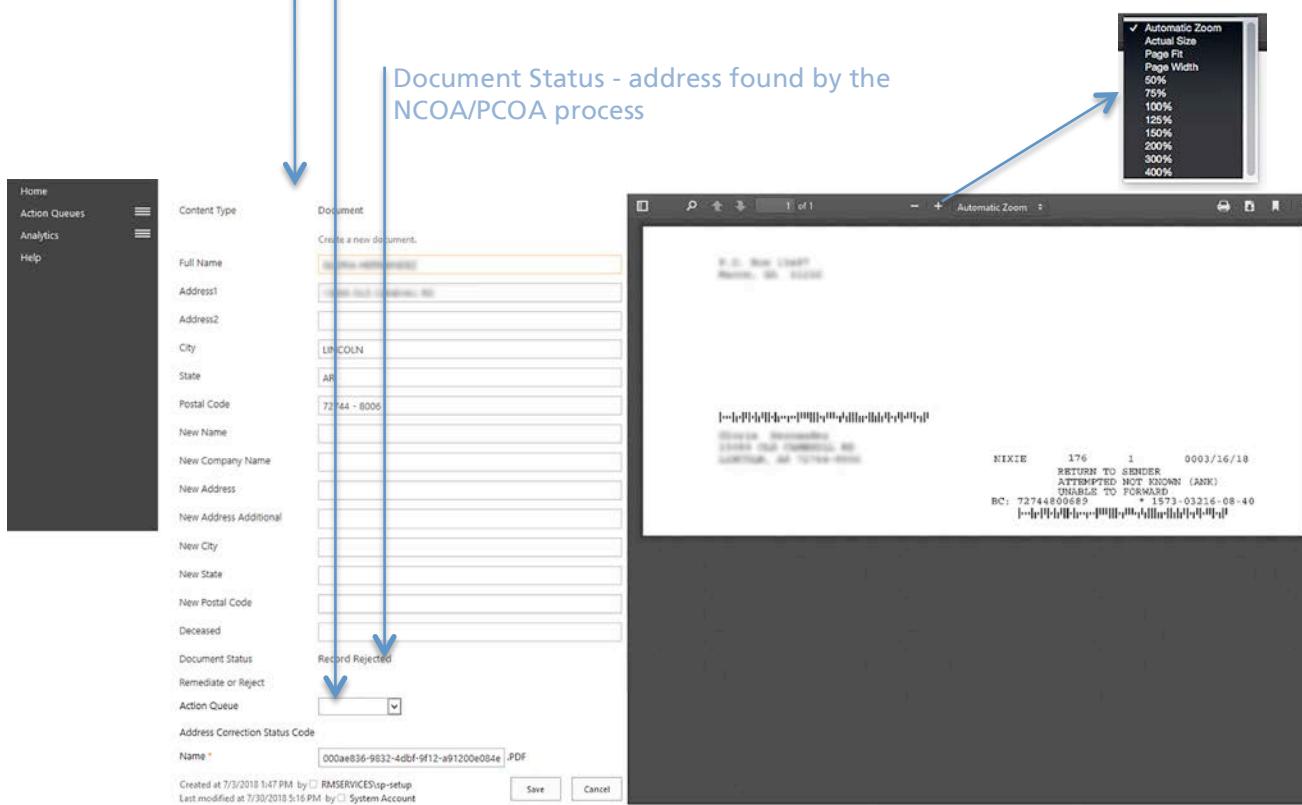
Basic Mail View Updated Addresses No New Address Found

Address1	City	State	Postal Code	Document Status	Address Correction Status Code
1000 10th COMMERCIAL RD	LINCOLN	AR	72744 - 8006	Awaiting Remediation	
1000 10th COMMERCIAL RD	KANSAS CITY	MO	64127 - 3505	Record Rejected	
1000 10th COMMERCIAL RD	KANSAS CITY	MO	64126 - 2522	Record Rejected	
1000 10th COMMERCIAL RD	YUKON	OK	73099 - 2928	Awaiting Address Update	
1000 10th COMMERCIAL RD	KANSAS CITY	KS	66101 - 3623	Remediated	

Return to Dashboard

 Click on icon to open the editor window

Action Queue - Forward an image to another Action Queue Library



Content Type

Document

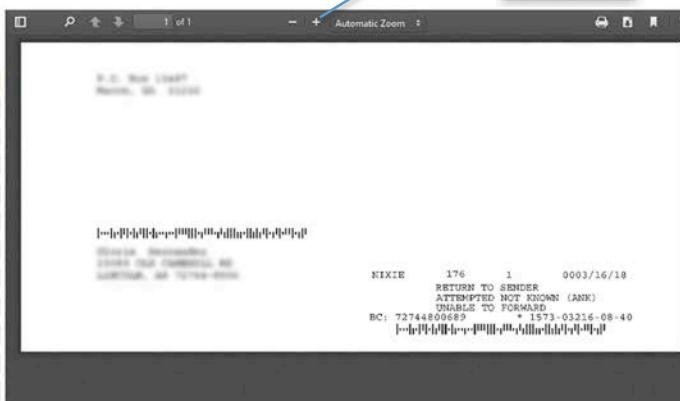
Create a new document.

Full Name	John Doe
Address1	1000 10th COMMERCIAL RD
Address2	
City	LINCOLN
State	AR
Postal Code	72744 - 8006
New Name	
New Company Name	
New Address	
New Address Additional	
New City	
New State	
New Postal Code	
Deceased	
Document Status	Record Rejected
Remediate or Reject	
Action Queue	
Address Correction Status Code	

Created at 7/3/2018 1:47 PM by RMSERVICESup-setup
Last modified at 7/30/2018 5:16 PM by System Account

Save Cancel

Document Status - address found by the NCOA/PCOA process



Automatic Zoom: 100%

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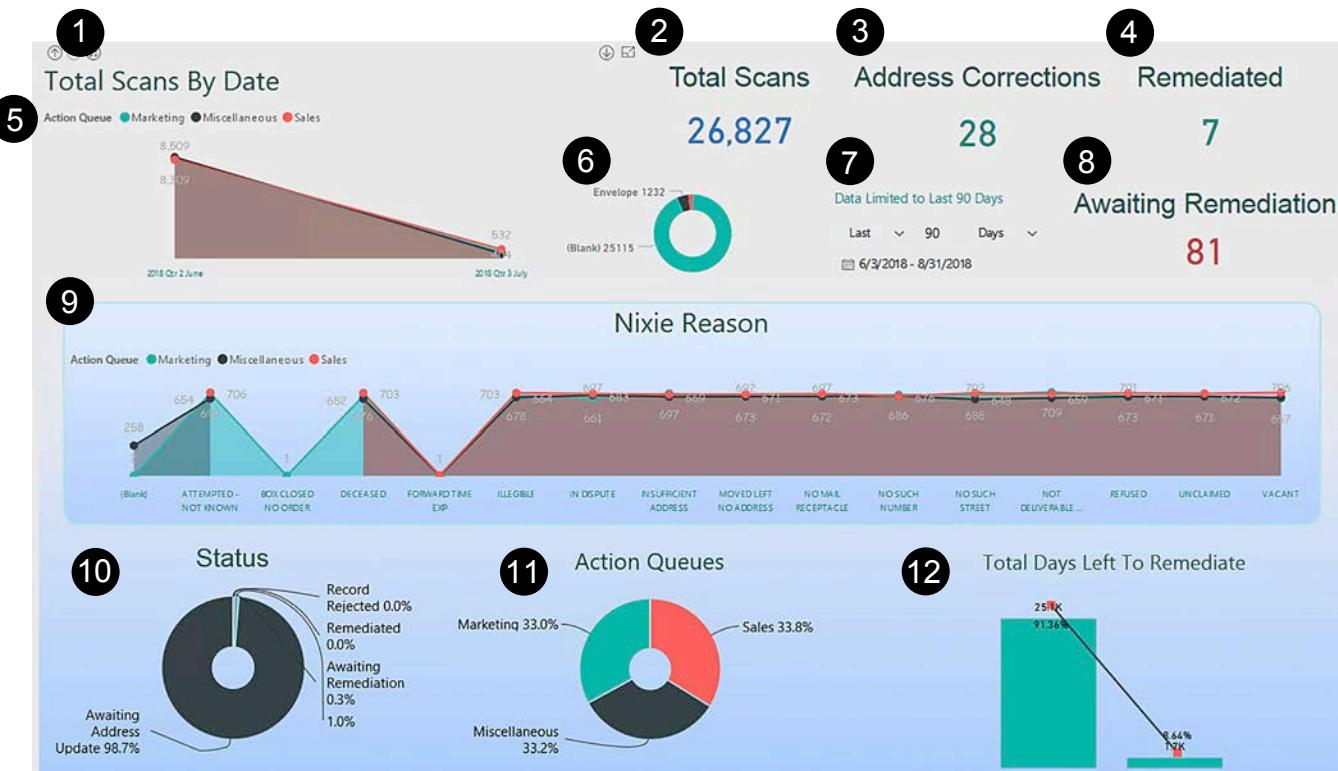
Analytics – Overview Dashboard

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



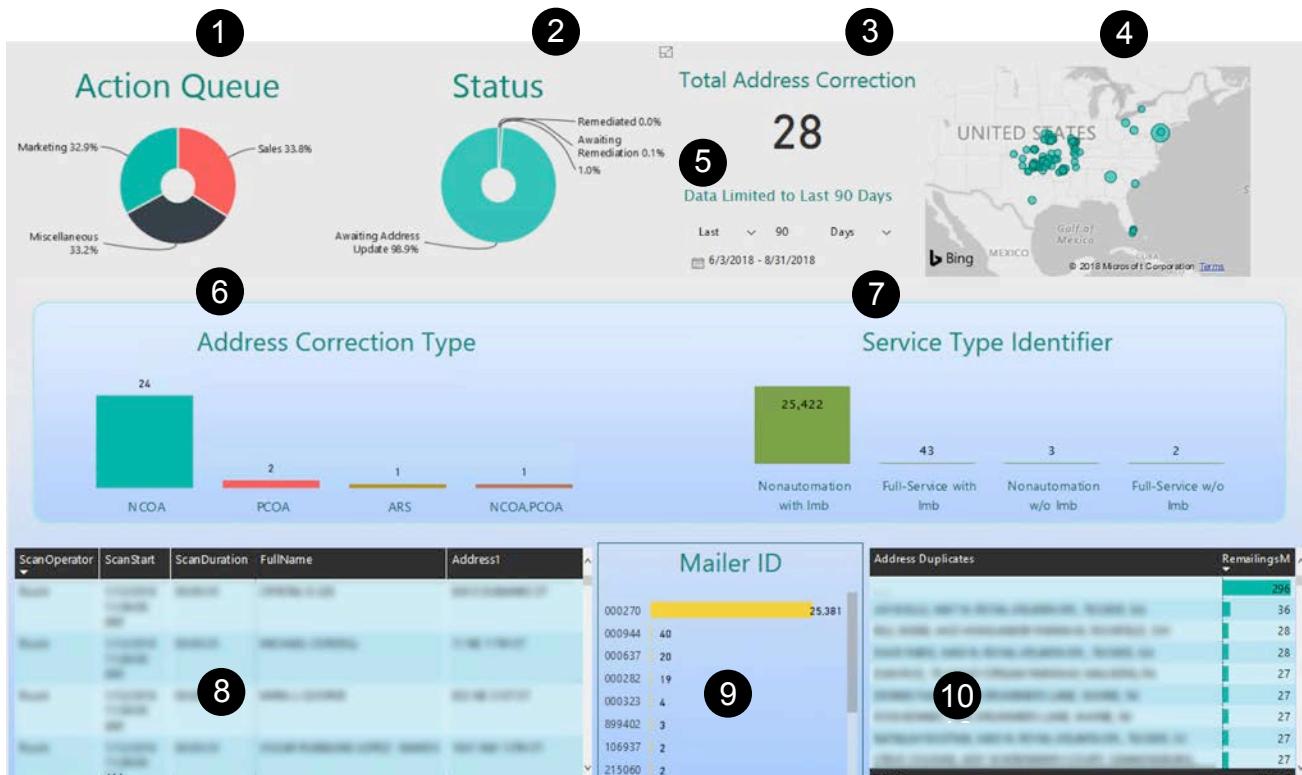
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Analytics – Descriptive Dashboard

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



10 Return Mail Services

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