

# Return Mail Services

## User Guide

**RICOH**  
imagine. change.

Return Mail  
Services

RMS



**RMS User Guide**

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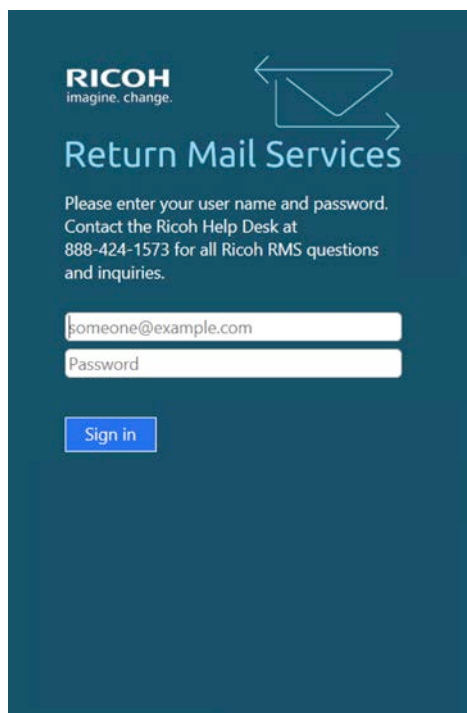
## **1 RMS REFERENCE**

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- 3. LOGIN**
- 4. ANALYTICS – NAVIGATION CONTROLS**
- 5. ANALYTICS – ACTION QUEUES NAVIGATION CONTROLS (BUTTON)**
- 6. ACTION QUEUES – RMS STATUS ICON DEFINITION**
- 7. ACTION QUEUES – SECTION FILTER**
- 8. ACTION QUEUES – DASHBOARD FILTER**
- 9. ACTION QUEUES – CONTENT EDITOR**
- 10. ANALYTICS – OVERVIEW DASHBOARD**
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- 12. ANALYTICS – ROI DASHBOARD**
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# 1 Return Mail Services

## Login



**RICOH**  
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**Return Mail Services**

Please enter your user name and password.  
Contact the Ricoh Help Desk at  
888-424-1573 for all Ricoh RMS questions  
and inquiries.

[Sign in](#)

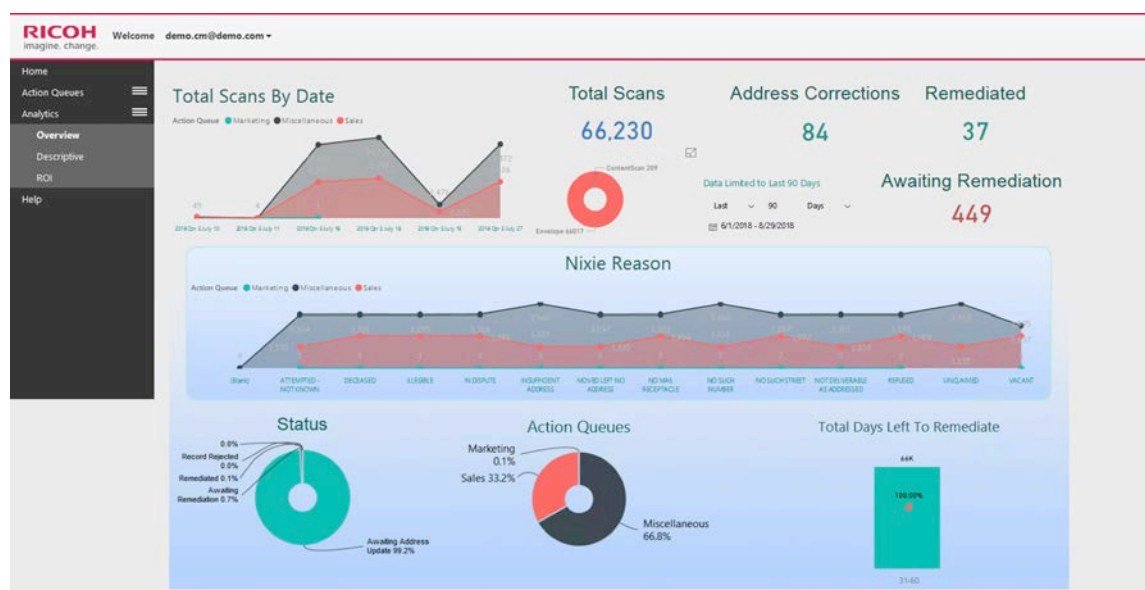
Standard user/group based authentication that can be managed by Ricoh. For the purpose of RMS Ricoh restrictions will control:

- 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



## 2 Return Mail Services

Analytics – Navigation Controls - [mouse click required](#)

Analytics – Tablet Controls - [a stylist is recommended for full experience](#)

⬆ Drill Up

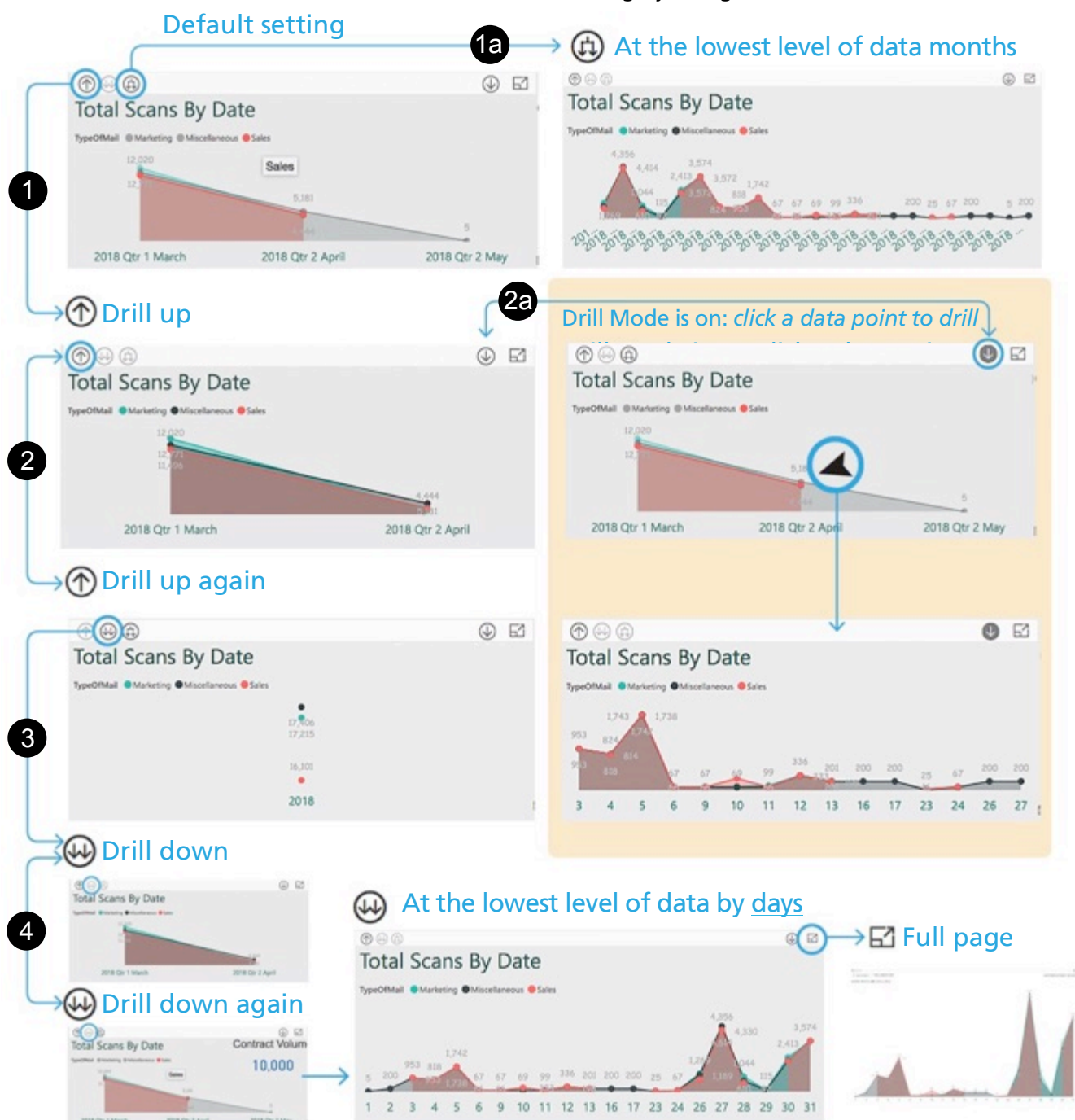
⬇ Go to the next level in the hierarchy

⬇ Expand all down one level in hierarchy

⬇ Click to turn on Drill Down

🖨 Focus mode

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

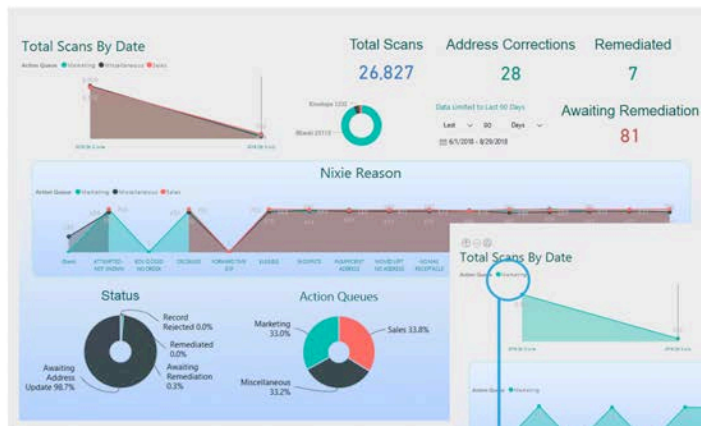


### 3 Return Mail Services

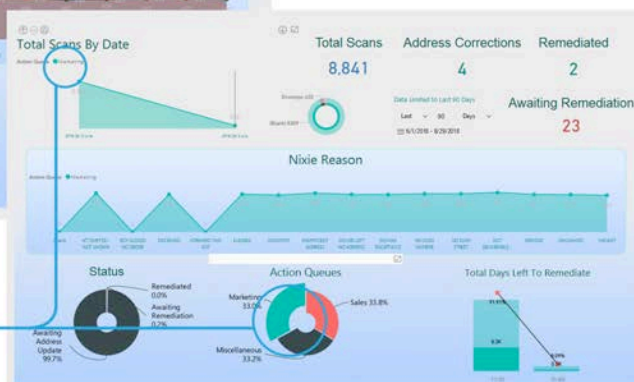
Analytics – Action Queues Navigation Controls **Mouse click required**

● Marketing ● Miscellaneous ● Sales

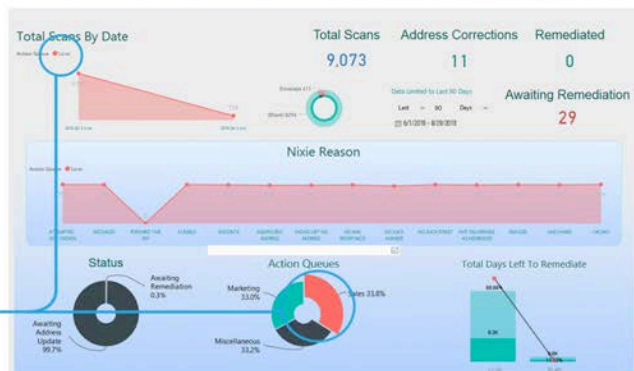
Default Home Screen



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

## 4 Return Mail Services

### 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"

Marketing

Enter a keyword

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	Status Code
...	...	...	...	...	...	Remediated	...
...	...	...	...	...	...	Awaiting Address Update	...
...	...	...	...	...	...	Awaiting Remediation	...
...	...	...	...	...	...	Record Rejected	...
...	...	...	...	...	...	Remediated	...
...	...	...	...	...	...	Remediated	...
...	...	...	...	...	...	Remediated	...
...	...	...	...	...	...	Awaiting Remediation	...
...	...	...	...	...	...	Awaiting Remediation	...
...	...	...	...	...	...	Record Rejected	...
...	...	...	...	...	...	Awaiting Remediation	...
...	...	...	...	...	...	Record Rejected	...
...	...	...	...	...	...	Remediated	...
...	...	...	...	...	...	Record Rejected	...
...	...	...	...	...	...	Awaiting Remediation	...



## 5 Return Mail Services

### 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)

Filter details

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
JUAN FRANCISCO GARZA LOPEZ	1228 SW 23RD ST		LINCOLN	AR	72744 - 8006	Awaiting Remediation	
ROBERT L ABEL	P NR - BE* - 13		KANSAS CITY	MO	64127 - 3505	Record Rejected	
ROSALIE F. BERINGER	43010 SE NORTH BEND WAY		KANSAS CITY	MO	64126 - 2522	Record Rejected	
EVELYN L VOGELY	6271 W. 157		YUKON	OK	73099 - 2928	Awaiting Address Update	
LUCIANO B. AVILA	451F		KANSAS CITY	KS	66101 - 3628	Remediated	
JOYE G.			NEWCASTLE	OK	73065 - 0995	Awaiting Address Update	

### Manually Confirm Remediation or Reject Record

Marketing

Enter a keyword

Document Status: (All) RTSReason: (All)

Filter details

All items

**Remediate Selected** **Reject Selected**

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

Marketing

Enter a keyword

Document Status: (All) RTSReason: (All)

Filter details

All items

**Remediate Selected** **Reject Selected**

Click check box to select choice

Full Name	Address1	Address2	City
JUAN FRANCISCO GARZA LOPEZ	1228 SW 23RD ST		
ROBERT L ABEL	P NR - BE* - 13		
ROSALIE F. BERINGER	43010 SE NORTH BEND WAY		
EVELYN L VOGELY	6271 W. 157		
LUCIANO B. AVILA	451F		
JOYE G.			

**Confirm Approval**

Cancel OK

Operation Completed

☐ Prevent this page from creating additional dialogs

OK

Marketing

Enter a keyword

Document Status: (All) RTSReason: (All)

Filter details

All items

**Remediate Selected** **Reject Selected**

Full Name	Address1	Address2	City
JUAN FRANCISCO GARZA LOPEZ	1228 SW 23RD ST		
ROBERT L ABEL	P NR - BE* - 13		
ROSALIE F. BERINGER	43010 SE NORTH BEND WAY		
EVELYN L VOGELY	6271 W. 157		
LUCIANO B. AVILA	451F		
JOYE G.			

**Confirm Rejection**

Cancel OK

Operation Completed

☐ Prevent this page from creating additional dialogs

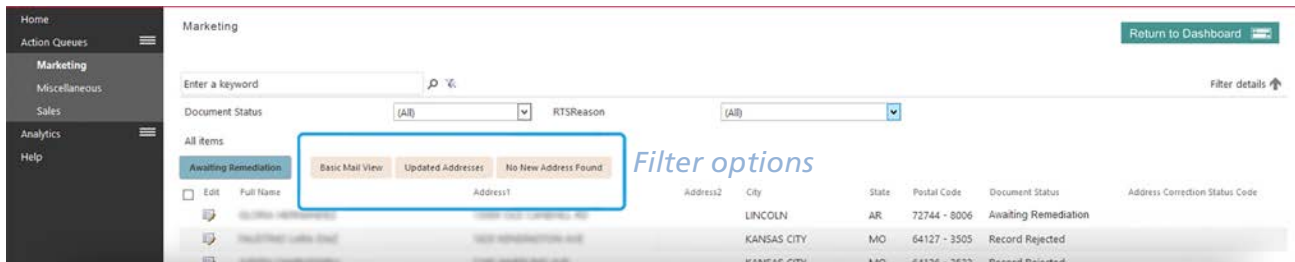
OK

## 5 Return Mail Services

### Action Queues – Section Filter Buttons

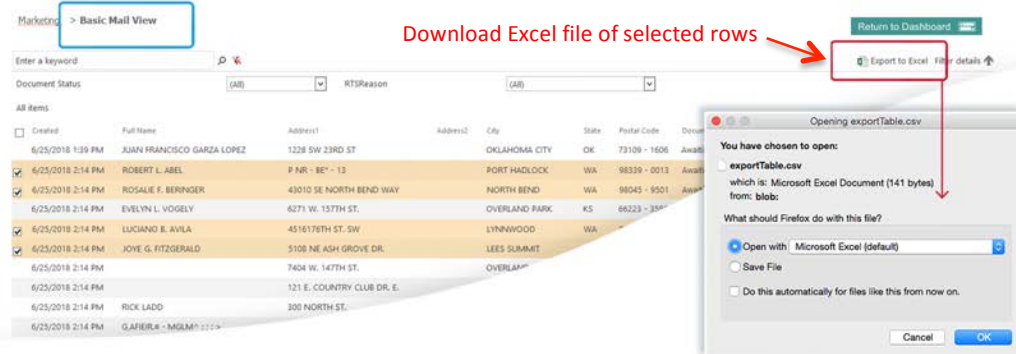
Document Libraries with filters for:

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

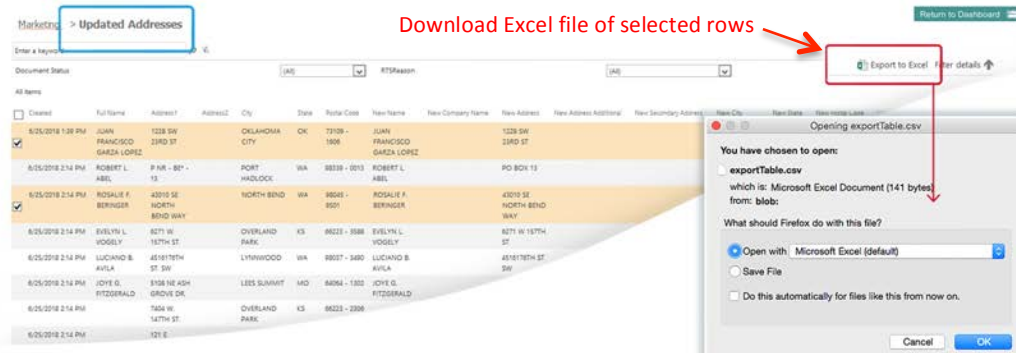


Filter option

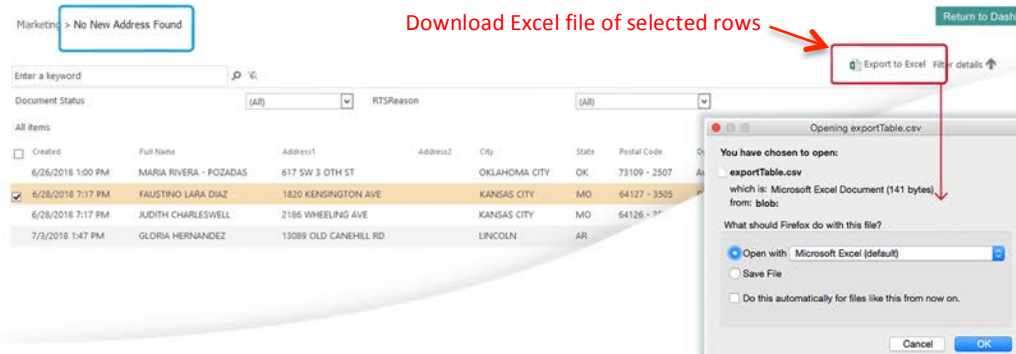
Click check box to select choice



Filter option



Filter option





## 6 Return Mail Services

### 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 RECEPTACLE
- 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

Home	Marketing	Enter a keyword	Document Status	(All)	RTSReason	(All)	Return to Dashboard	Filter details
Action Queues								
Marketing								
Miscellaneous								
Sales								
Analytics								
Help								

All Items								
	Full Name	Address1	Address2	City	State	Postal Code	Document Status	Address Correction Status Code
<input type="checkbox"/>	EDITHA HERNANDEZ	10888-0000 LINCOLN RD		LINCOLN	AR	72744 - 8006	Awaiting Remediation	
<input type="checkbox"/>	THOMAS LUNA JIM	1000 WASHINGTON AVE		KANSAS CITY	MO	64127 - 3505	Record Rejected	
<input type="checkbox"/>	ADITHA HERNANDEZ	1188 WASHINGTON AVE		KANSAS CITY	MO	64126 - 2522	Record Rejected	
<input type="checkbox"/>	THOMAS LUNA JIM	2000 WASHINGTON AVE		YUKON	OK	73099 - 2928	Awaiting Address Update	
<input type="checkbox"/>	THOMAS LUNA JIM	2000 WASHINGTON AVE		KANSAS CITY	KS	66101 - 3628	Remediated	
<input type="checkbox"/>	EDITHA HERNANDEZ	1000 WASHINGTON AVE		NEWCASTLE	OK	73065 - 0995	Awaiting Address Update	
<input type="checkbox"/>	EDITHA HERNANDEZ	1000 WASHINGTON AVE		TULSA	OK	74136 - 3821	Remediated	
<input type="checkbox"/>	EDITHA HERNANDEZ	1000 WASHINGTON AVE		TULSA	OK	74136 - 3821	Awaiting Address Update	
<input type="checkbox"/>	EDITHA HERNANDEZ	1000 WASHINGTON AVE		BETHANY	OK	73008 - 6156	Awaiting Remediation	
<input type="checkbox"/>	EDITHA HERNANDEZ	1000 WASHINGTON AVE		TULSA	OK	74116 - 3009	Awaiting Address Update	
<input type="checkbox"/>	EDITHA HERNANDEZ	1000 WASHINGTON AVE		KIEFER	OK	74041 - 4401	Awaiting Remediation	
<input type="checkbox"/>	EDITHA HERNANDEZ	1000 WASHINGTON AVE		OKLAHOMA CITY	OK	73114 - 4008	Awaiting Address Update	
<input type="checkbox"/>	EDITHA HERNANDEZ	1000 WASHINGTON AVE		OKLAHOMA CITY	OK	73107 - 3805	Awaiting Address Update	
<input type="checkbox"/>	EDITHA HERNANDEZ	1000 WASHINGTON AVE		TULSA	OK	74128 - 1241	Awaiting Address Update	
<input type="checkbox"/>	EDITHA HERNANDEZ	1000 WASHINGTON AVE		MARMADUKE	AR	72443 - 9207	Awaiting Address Update	
<input type="checkbox"/>	EDITHA HERNANDEZ	1000 WASHINGTON AVE		OVERLAND PARK	KS	66212 - 1989	Awaiting Address Update	
<input type="checkbox"/>	EDITHA HERNANDEZ	1000 WASHINGTON AVE		OKLAHOMA CITY	OK	73114 - 5109	Awaiting Address Update	
<input type="checkbox"/>	EDITHA HERNANDEZ	1000 WASHINGTON AVE		KANSAS CITY	MO	64126 - 2446	Awaiting Address Update	

## 7 Return Mail Services

### 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

Full Name	Address1	Address2	City	State	Postal Code	Document Status	Address Correction Status Code
Lincoln, William	10000 1000 1000000000		LINCOLN	AR	72744 - 8006	Awaiting Remediation	
Recorded with error	1000 1000000000000000		KANSAS CITY	MO	64127 - 3505	Record Rejected	
Address Correction	1000 1000000000000000		KANSAS CITY	MO	64126 - 2522	Record Rejected	
Thomas, William	1000 1000000000000000		YUKON	OK	73099 - 2928	Awaiting Address Update	
1000 1000000000000000	1000 1000000000000000		KANSAS CITY	KS	66101 - 3628	Remediated	



*Click on icon to open the editor window*

Action Queue - Forward an image to another Action Queue Library

☒ Sales  
☐ Marketing  
☐ Miscellaneous

Document Status - address found by the NCOA/PCOA process

☒ Automatic Zoom  
☐ Actual Size  
☐ Page Fit  
☐ Page Width  
 50%  
 75%  
 100%  
 125%  
 150%  
 200%  
 300%  
 400%

Content Type: Document

Create a new document.

Full Name: [Text Field]

Address1: [Text Field]

Address2: [Text Field]

City: [Text Field]

State: [Text Field]

Postal Code: [Text Field]

New Name: [Text Field]

New Company Name: [Text Field]

New Address: [Text Field]

New Address Additional: [Text Field]

New City: [Text Field]

New State: [Text Field]

New Postal Code: [Text Field]

Deceased: [Text Field]

Document Status: [Text Field]

Remediate or Reject: [Text Field]

Action Queue: [Dropdown Menu]

Address Correction Status Code: [Text Field]

Name: [Text Field]

Created at 7/3/2018 1:47 PM by [Text Field] RMSEVICES\up-setup  
Last modified at 7/3/2018 5:16 PM by [Text Field] System Account

Save Cancel



## 8 Return Mail Services

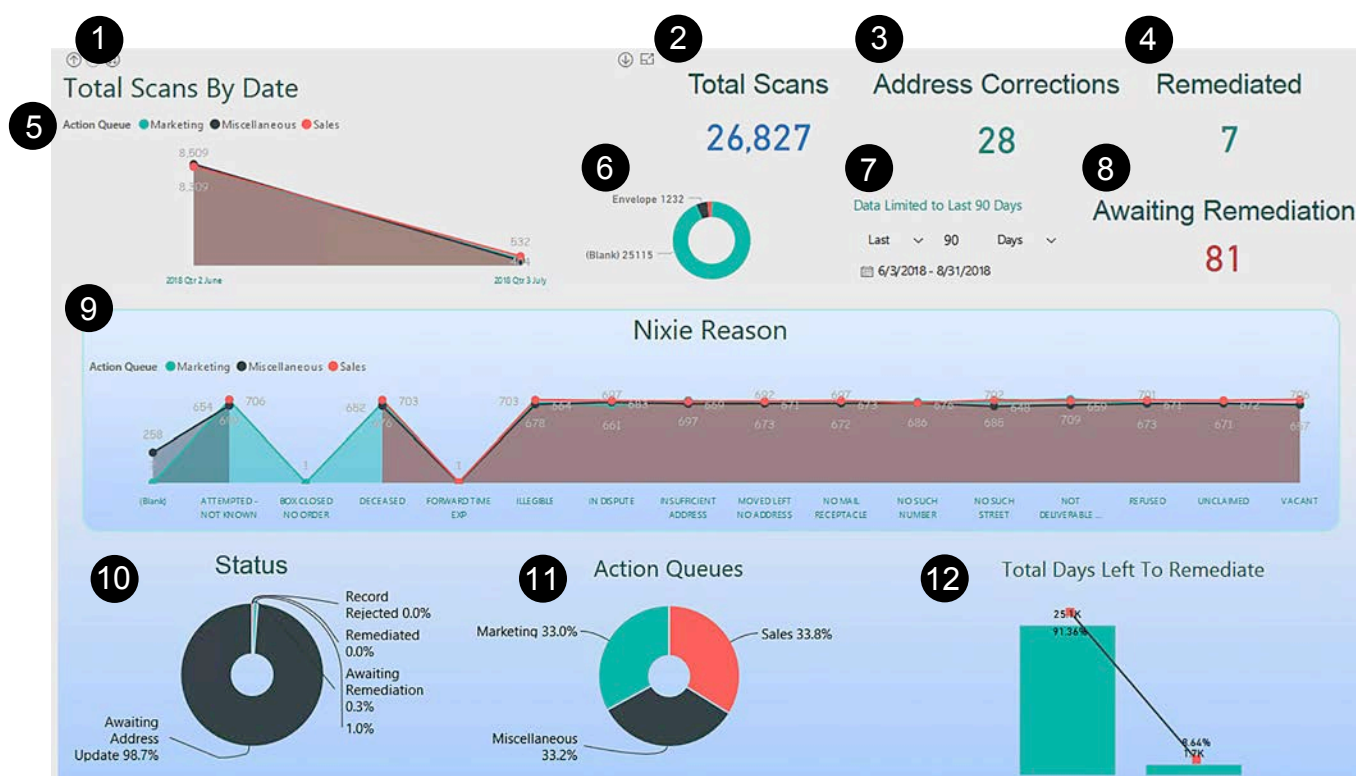
### Analytics – Overview Dashboard

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



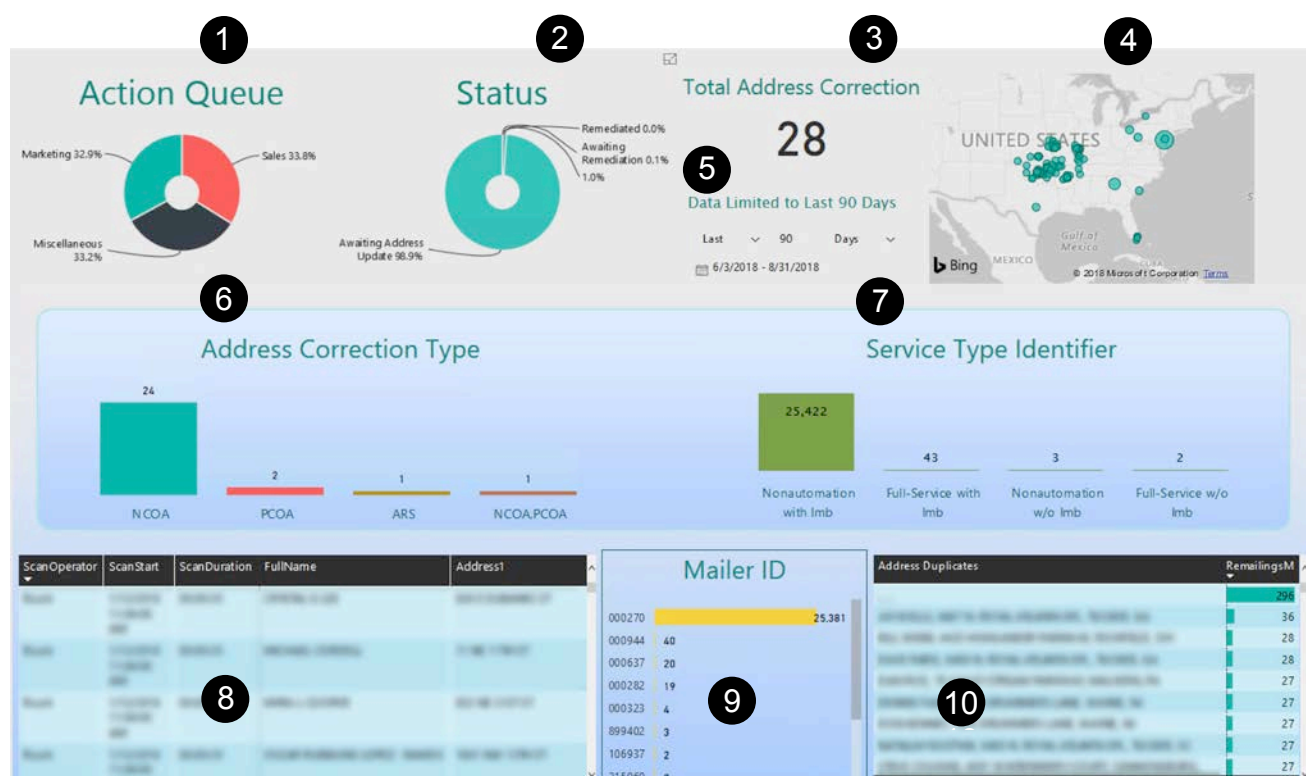
## 9 Return Mail Services

### 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



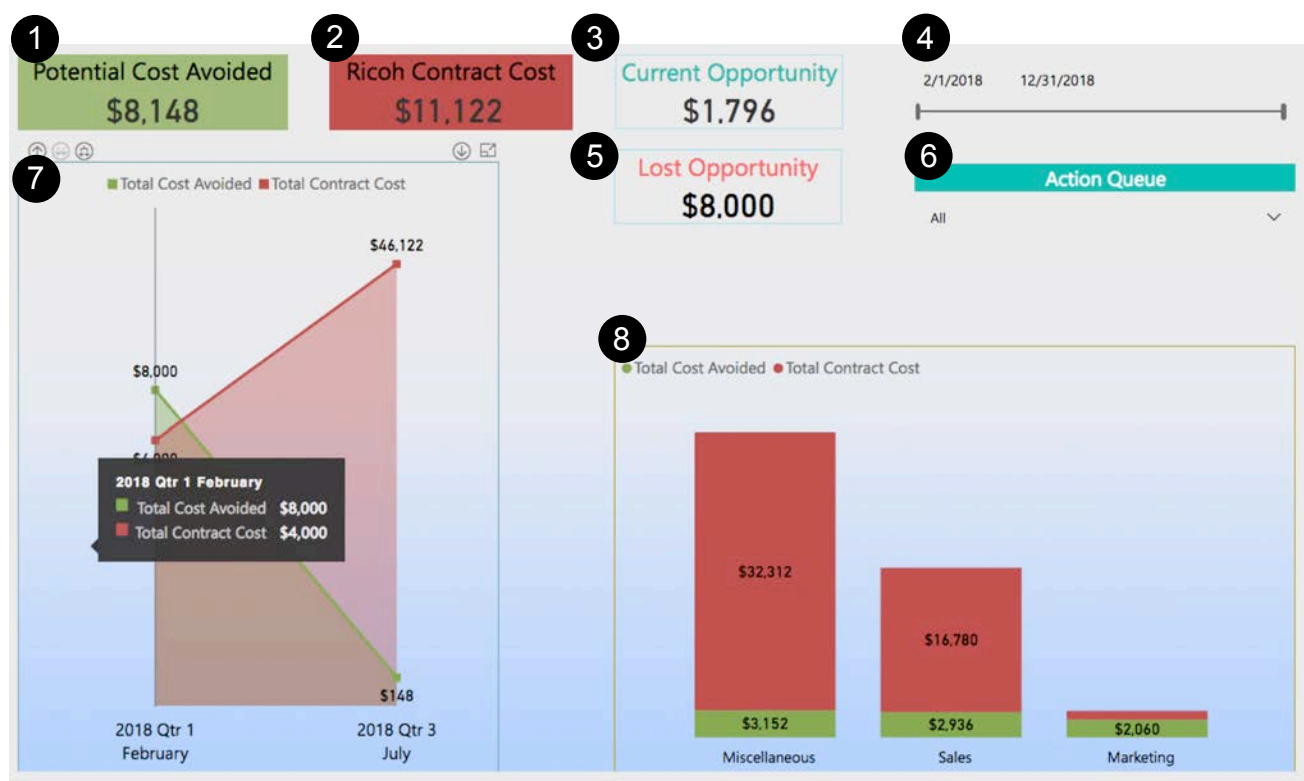
## 10 Return Mail Services

### 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