

# How The System Works

## ***What does it do?***

Our system allows you to enter addresses from your returned mail and then looks up the current address of the individual in question. The system has up to a 90% success rate. Specifically, most of our clients are interested in finding updated addresses for returned invoices, as our service is much cheaper than a collection agency or write-offs.

## ***It's web based...***

Our system is web-based, meaning that all you need to access it is a web browser and an Internet connection. Your web browser must support forms, JavaScript and cookies; otherwise the web site will not work properly.

## ***What about security...***

Our system protects your privacy and the privacy of your clients by using 128 bit SSL encryption while you are working on the web site. Our servers are behind well-configured firewalls and we apply any available security fixes almost immediately.

The most important security measure though, **is your password**. Your passwords should be at least 8 characters long, they should include upper case letters, lower case letters and numbers. Your password should never be the name of a family member or pet. It should not be a birth date, social security number, street address or anything else that might be easy to guess.

Note: Our servers are also protected by UPS units, RAID, nightly backups and updated antivirus software.

## ***A little bit about batches...***

Bad addresses are submitted to us in groups, called "batches." Each batch has a unique number associated with it, called a "Batch ID." The "Batch ID" is automatically generated by the system and it cannot be changed. Along with the Batch ID, you are given an opportunity to enter a description of the batch. Both of these things are designed to help you identify each batch that you create.

Each batch may have from 1 to 1000 bad addresses in it.

We provide you with three methods of entering addresses into batches. You may enter them manually with an online form, upload them from a Microsoft Excel spreadsheet, or (if you have a medical management system in place) you may be able to upload a file that your system creates.

### ***Checking your information...***

Once you have a "Batch" with bad addresses in it, we provide you with the ability to review and delete records from that batch as well as a "Duplicate Check" with four different methods of checking for duplicate addresses.

### ***Submitting the batch...***

Once you have created a batch and reviewed it, the next step is to submit the batch for processing. It may take up to 24 hours to process the information and return the results to you. The "primary contact" at your organization will receive an e-mail when the batch results are available and you may check back periodically to see if the results are in.

### ***The results are in...***

Once the results are back for your batch, we provide you with three ways of retrieving the information. There are two different online reports available, as well as the ability to download the results as a .CSV file that can be opened by many applications, including Microsoft Excel.

### ***A quick note before you begin...***

For your convenience, there is a screen shot of the batch menu at the end of this manual. Many of the areas in this manual refer to objects such as the *navigation bar* – you can look at the screen shot on the last page for a visual reference to these objects.

# Logging In

To log in to the system, you will need the username and password provided to you by RMS. Once you have your username & password, open your web browser and navigate to <http://www.returnmailsolutions.net> and then click on the "login" button toward the upper-right corner of the web page. Then follow the instructions to either accept or install the security certificate and create a bookmark.

To log in quickly, use: [https://webapp.returnmailsolutions.net/p\\_login.asp](https://webapp.returnmailsolutions.net/p_login.asp) and click "yes" when prompted to accept the security certificate.

# Creating A Batch

## Creating A Batch Manually

If you plan to enter your data by hand, use the "Create" link under "New Batch." On the "Create New Batch" screen, enter a description of up to 50 characters and then click the "Create" button underneath the description field. Once you create the batch, you are immediately taken to the "Add Record" screen where you may begin entering data. Required fields are marked by a red asterisk. After entering each record, you will be returned to a blank form. When you are finished entering records, simply use the navigation bar at the top to return to the Batch Menu or any other part of the system.

**Navigation Tip:** Once you have selected a batch from the batch menu, it is not necessary to return to the batch menu to perform other functions. For example, if you have selected a batch and added records, you can click directly on the "review" button from the navigation bar to review and immediately after you have finished the review, you can click "check duplicates"

## Uploading A Batch

When uploading records, a new batch is automatically created. To upload a batch, click on the "Upload" button under "New Batch." From the "Upload New Batch" page, use the "Select" button to find the file that you want to upload. Once you have selected the file, "File Selected." will appear next to the "Select" button. Next, enter a batch description of up to 50 characters and click "submit." When the file is uploaded successfully, click on the "Batch Menu" button to return to the batch menu. Also note that you may add additional

records to the uploaded batch by selecting it from the list on the "Batch Menu" page and then clicking the "Add Record" button from the navigation bar.

The "Get Template" button on the "Upload New Batch" page allows you to download a template file to enter data.

Using the same format as the template that we provide, you may be able to configure your own in-house records system to export data into a CSV file. If possible, this will save you a significant amount of time as opposed to manual data entry.

We strongly recommend that you either use Microsoft Excel to enter data into the template or acquire technical assistance from your support provider on configuring your in-house records system to properly export your data for upload.

If there are errors, please review your upload file for accuracy. The format of the file must match the upload template exactly.

### **Adding Records To A Batch**

Once a batch has been created, but before the batch has been submitted, you may add records to that batch at any time. From the batch menu, select the batch that you want to add records to and click the "Add Record" button from the navigation bar. Also note that multiple users can add records to a batch at the same time. Each user simply selects the batch and clicks "Add Record"

**Navigation Tip:** When adding records to a batch, use your tab key to move from field to field instead of switching to the mouse. This will make data entry significantly faster.

## **Reviewing Records**

Once you have created a batch and entered data, it is recommended that you review the information and check for duplicates using the tools that we provide. Use the review process to update and delete records from a batch and use the check duplicates feature to help avoid being charged for duplicate records.

### **Review**

To review a batch, select the appropriate batch from the "Batch Menu" page and then click the "Review" button from the navigation bar. The review page gives you the ability to review your data as well as update and delete individual

records as necessary. Each page will show five records. Use the record navigator at the bottom of the table to move through the records in the batch. Note that required fields here are marked with a red asterisk.

**Navigation Tip:** On most pages, just underneath the navigation bar, you can see what page you are on, which batch you are working with and the description of that batch. Some pages also show you the number of transactions (or records) in that batch right next to the Batch ID number.

## Check Duplicates

Since you are charged on a per-hit basis, checking a batch for duplicates before you submit it will help you avoid unnecessary charges. From the batch menu, select the batch that you would like to check for duplicates and then click the "check duplicates" button on the navigation bar. Once you are on the "Check Duplicates" page, you will see a secondary navigation bar on the upper-right corner of the duplicates table. You should check each of the four entries next to "View Duplicates By" to search for duplicate entries. For example, click on "SSN" to check for duplicates by Social Security Number. Once you have finished with that check, click on "First+Last Name" to check for any entries that have the same first and last name, etc.

NOTE: If you make changes to any record under "Review" or "Check Duplicates" you *must* click on the "update" button for that record or your changes will not be saved.

## Submitting A Batch

Now that you have entered data into a batch and reviewed it, you must submit the batch to processing before you will get your results back. Submitting a batch is how you tell the system that it is ready to be processed.

To submit a batch, select the appropriate batch from the batch menu and then click "Submit" on the navigation bar. Then, you must tell the system that you agree to the terms set forth by checking the box at the bottom of the table and then clicking the "Submit" button. If you decide that you do not want to submit the batch, simply click "Cancel."

## Retrieving Batch Results

After you submit the batch, the primary contact at your organization will be notified when the batch processing is complete. This can take up to 24 hours to complete. Once your results are ready, we provide you with two online reports that are printable as well as the ability to download those results in a .CSV file. Microsoft Excel as well as many other applications is able to open .CSV files.

It is important that you download your batch results and keep them in a safe location on your system. We will purge completed batches from our system in less than 30 days.

To view an online report or download your results, select the appropriate batch from the batch menu and then click one of the three links on the navigation bar under "actions for completed batch."

**Report 1** - The top section of this report shows you records that we were able to match with an updated address. The bottom half of this report shows you your *original* data (it has not been updated) for records that we could not find an updated address for.

**Report 2** - Each record is shown side-by-side with the original data on the left side and any updated information on the right side. Note that this report has two columns. The blue column is one original record and result. The yellow column is a second record with its corresponding results.

**Download** - once you click the download button, you are taken to the "Download Results" page. Once here, you must click the "download" button underneath the text "The requested batch is ready for download" and then save the file to your system. We strongly recommend that you save every batch to your system in a location that is backed up daily.

## Deleting A Batch

Once you have downloaded a batch, or if you decide that a batch will not be processed, you may select the batch from the batch menu and then click on the "Delete" button on the navigation bar, under "actions for selected batch." After you have chosen the option to delete the batch, you must confirm the deletion before it will take place.

**DELETING A BATCH IS PERMANENT! IT CANNOT BE UNDONE!**

# Reference: The Batch Menu

**Navigation Bar**

Return Mail SOLUTIONS ADDRESS CORRECTION AND MANAGEMENT SECURE CONNECTION

NEW BATCH: create upload    ACTIONS FOR SELECTED BATCH: add record review check duplicates submit delete    ACTIONS FOR COMPLETED BATCH: report 1 report 2 download    GO TO: batch menu

**Information Area**

batch menu please select a batch

RECORDS SHOWN WITH A STATUS OF: ALL OPEN SUBMITTED COMPLETED

Select:	ID:	Description:	Created:	User Name:	Status:	Transactions:
<input type="radio"/>	16	Demo1	null	robb tanis	open	11
<input type="radio"/>	19	uploaded 6/29/04	null	robb tanis	open	6
<input type="radio"/>	27	THIS IS A BIG, BIG, BATCH!	null	scott johnston	open	1540
<input type="radio"/>	50	FTP Test 1	null	scott johnston	submitted	4
<input type="radio"/>	65	test x	10/7/2004	scott johnston	submitted	1
<input type="radio"/>	67	UPLOAD TEST FROM SLADD	10/14/2004	scott johnston	open	8
<input type="radio"/>	68	TEST DATA FROM SLADD	10/18/2004	scott johnston	open	8
<input type="radio"/>	71	SJ_Test	10/25/2004	scott johnston	completed	1
<input type="radio"/>	72	test	10/27/2004	scott johnston	open	0
<input type="radio"/>	73	test2	10/27/2004	scott johnston	open	0
<input type="radio"/>	74	test	10/27/2004	scott johnston	open	1

**Batch Selector** (points to radio buttons)

**Batch ID number** (points to ID column)

**Batch Description** (points to Description column)

**Batch Creation Date** (points to Created column)

**User Who Created The Batch** (points to User Name column)

**Current Batch Status:**  
 - open  
 - submitted  
 - completed

**Number of records currently entered into the batch** (points to Transactions column)