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Winning post

An inbound digital mailroom solution can save your organisation time and resources, explains Storetec's Grace Schneider

During a recent meeting, a client told us they wanted to look for a solution to save money and resources on their current mailroom solution. This company received considerable and increasing numbers of inbound mail. Birmingham's designated central admin office was the receiving hub for all company mail, handled by a team of five employees and a team leader, who sorted, opened, scanned, and distributed the mail via email to the relevant individuals and departments.

With the cost of office space, increases in salary, equipment and software, and the prospect of adding more staff, they costed

their internal mailroom operation at around £180,000 per annum. The decision was made to find a trusted partner who could take on the job of running their inbound mail operations.

You may be asking, what exactly is an inbound digital mailroom? Put simply, a digital mailroom is the use of electronic documents for your inbound mail. The outsourced provider will collect from the Royal Mail, or have delivered, your inbound mail items each day. They will pre-sort, open, prepare, and digitise each mail item before delivering it back, usually in PDF form. Digital mailroom eliminates the need for your

"DIGITAL MAILROOM ELIMINATES THE NEED FOR YOUR COMPANY TO HANDLE INCOMING PHYSICAL MAIL SO THAT YOU CAN FOCUS TIME AND RESOURCES ON ESSENTIAL ACTIVITIES. A DEDICATED PROJECT TEAM WILL HANDLE ALL ASPECTS OF YOUR ONGOING DIGITAL MAILROOM SERVICE, FROM SETTING UP A REDIRECT OR PO BOX TO HOSTING YOUR SCANNED MAIL ON A SECURE DOCUMENT MANAGEMENT SYSTEM OR RETURNING IT TO YOU ELECTRONICALLY."

company to handle incoming physical mail so that you can focus time and resources on essential activities.

A dedicated project team will handle all aspects of your ongoing digital mailroom service, from setting up a redirect or PO box to hosting your scanned mail on a secure document management system or returning it to you electronically.

You can decide whether you redirect mail short or long-term, set up a dedicated PO box or receive email attachments to a central inbox, e.g., yourcompany@storetec.net.

SORTING INCOMING MAIL

Mail can come from a number of sources: PO boxes, email attachments to a central inbox, or redirected mail - short and/or long term.

A pre-open sort will then take place to distinguish:

- Spam
- Suspect
- White mail
 - Unstructured letter
 - Completed forms usually in a pre-printed return envelope.

Any SLA's are prioritised, e.g., returned forms over unstructured mail.

PREPARATION & SCANNING

Once the mail is opened, it is assessed to determine the quality and whether it can be scanned. We have a wide range of specialist scanning equipment and a large team of trained operatives who can handle all types of documents.

Mail will be prepared by removing staples and paperclips and checking for small documents and Post-It Notes that need to be photocopied before scanning. We insert patch codes to show where to split the documents electronically.

Cherished documents, such as marriage certificates, death certificates etc. are scanned and returned to the sender if required. Cheques can also be banked if needed. Quality Assurance checks are performed throughout the whole digitisation process.

CLASSIFICATION

Visual classification logic will then look at the mail structure and decide what to classify it as. Some examples are:

- Invoice
- Contracts
- HR documentation
- Forms
- Letter

Not every document can be classified by its visual characteristics. OCR can be applied to look for keywords in the mail to push it through a specific workflow, e.g. change of address or complaints. We will push any exceptions into a workflow for manual intervention. AI is used to make our software learn from each exception, reducing the need for manual intervention with some mail items. SLA's will be applied after all documents are classified to make sure this mail is prioritised.

DATA EXTRACTION

The key data from documents can be captured if required using OCR, ICR, or OMR. Information such as client name, invoice number, PO number, etc. can be extracted from the mail and automatically added to databases. This saves time as your team does not have to do this manually.

AUTOMATED DATA VALIDATION

Our validation software learns from manual interventions to prevent them from happening in future.

It can also validate against a current data set, e.g. matching an address from a letter to an address already on your system or matching against Purchase Order values.

WORKFLOW AND AUTOMATION

Scanned mail will be pushed either onto your internal systems or a document management system like Storetec's FreeDocs document management portal. Automatic routing or workflow can ensure the correct documents are delivered to the right member of your team.

Information can be extracted and uploaded into your internal system. For example, a document classified as an invoice can be matched to a PO within the Accounts Payable system, and the invoice details will be extracted and added to the system. This can also work with CRM systems, e.g. an address change.

No matter how bespoke your requirement, your supplier will work with you to understand your needs and put workflows in place to meet these. One of our clients needed to email scanned mail items to the relevant insurance company. Storetec created a bespoke workflow within FreeDocs document management system with a drop-down of all required email addresses. Whenever they were notified that the mail had been scanned for the day, all they had to do was select the relevant insurance company from the menu and the PDF was sent from FreeDocs with a pre-written email template.

If you would like further information or advice on digital mailroom and how this could benefit your business, please contact our expert team today. We'd be more than happy to arrange a conference call on Microsoft Teams, Zoom or any other preferred platform to discuss a potential project.

More info: www.storetec.net