



Collections Etc. Teams with Fairfax Imaging to Automate Mail Order

Providing state-of-the-art products and services to the payment and forms processing industries

Background

Collections Etc. Inc., a mail order catalog business with a highly seasonal workflow began evaluating optical and intelligent character recognition and mail opening systems in 2005.

The goal was to replace Collections' manual processing with cost-effective automation. Collections needed a solution that would:

- Improve the ability to process mailed and faxed customer orders
- Improve cost efficiency of operating the mail-processing department
- Increase speed and ability to respond when customer demands hit their seasonal peaks
- Interface with the current systems
- Interface with future planned systems
- Grow with the company
- Be easy to use and maintain
- Better utilize Collections' customer service staff.

New to Automated Data Capture, Tony Maunus, Director of Customer Care at Collections Etc. started his search for a solution by attending a TAWPI conference and contacting several hardware and software vendors represented there. After several months of research, Maunus selected Fairfax Imaging as the best vendor to meet Collections' requirements.

"Fairfax Imaging is hardware independent," said Maunus. "I didn't want Collections locked in to one brand of hardware. I knew our requirements were unusual and might require more than one brand of equipment or software to effectively automate the different tasks within our operation."

In fact, it required an eclectic mix of hardware to provide a solution that would meet the tailoring requirements for Collections' business. As for software, Fairfax Imaging's modular Quick Modules suite of data capture and imaging software was flexible and adaptable enough to satisfy their business rules.

"Fairfax Imaging persisted with the development effort refusing to give up until we had a solution that handled our forms and met our unique business requirements," said Tony Maunus – Director Customer Care, Collections Etc.

Benefits

- Reduces operating expense
- Enables shorter turnaround for processing mailed and faxed orders
- Provides faster delivery of product to customer
- Eliminates need for second shift in peak season
- Allows for future growth within available space
- Allows for flexibility of having off-site or work-at-home agents for data perfection
- Increases cash flow through automatic deposit into bank eliminating all manual deposits

Order Form Design

Over the years, Collections has invested time and effort into fine tuning their mail order operation to make maximum use of as few resources and overhead expenses as possible. For example, the Collections' order form is the result of a long and careful design effort which has resulted in a form that is easy for customers to use and inexpensive to print and mail. Rather than re-tailor the Collections' order form to meet the requirements of a given scanner transport, it made sense to find a system that could be tailored to handle the form. As it turned out, this wasn't easy.

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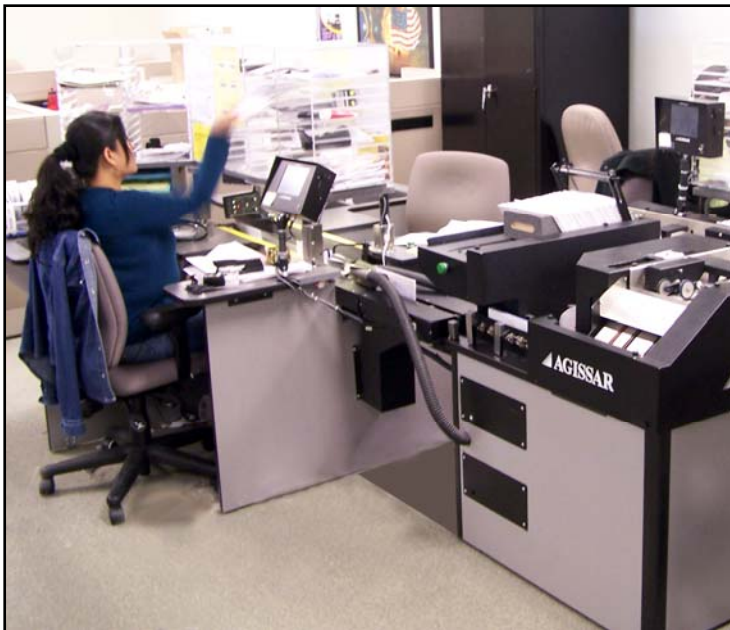
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Approach

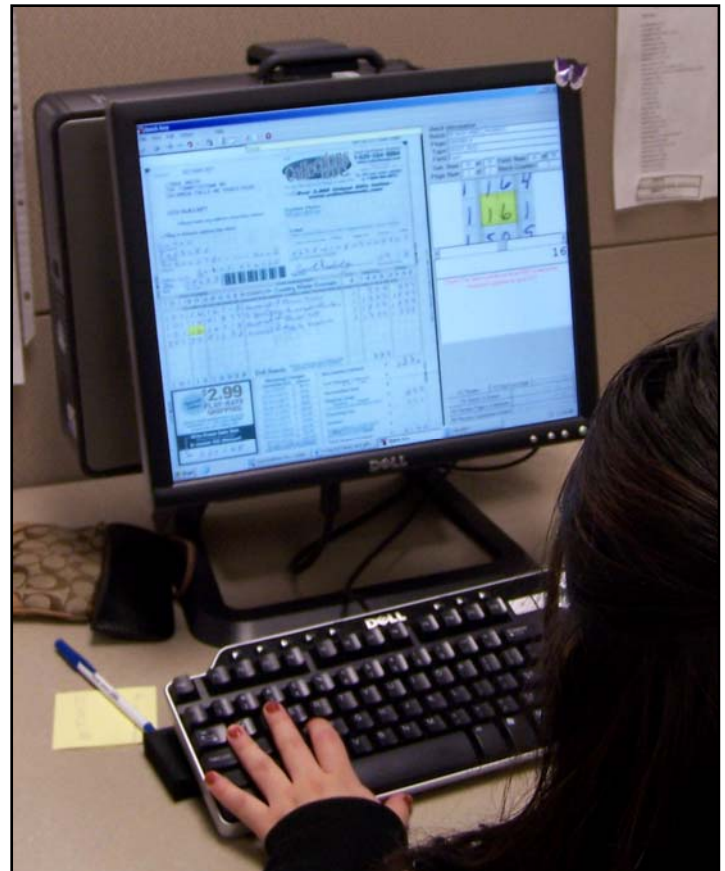
Collections Etc. mails catalogs all over the US. Customers fill out an order form inside the catalog and return it with a check. The Fairfax Imaging solution employs an Agissar triple-cut envelope slitter with a transport that delivers the opened envelope and its contents to an Agissar extraction desk. Operators extract the forms and checks as well as any correspondence that a customer includes with their order.

Forms, checks and correspondence are batched according to contents and sent to an IBML ImageTrac III scanner/transport for imaging. Fairfax Imaging's *Quick Modules* software suite images checks, forms, envelopes and correspondence in the same workflow. *Quick Modules*' ability to define transactions using any number of criteria eliminates the need for transaction header sheets.

After the scanning process, *Quick Modules* electronically enhances the images and performs intelligent character recognition to capture data from the forms, checks and



The Agissar triple-cut slitter opens and transports envelopes to an operator who extracts the contents for batching



A Collections Etc. operator uses Quick Modules to key-correct order forms

envelopes. Extensive and complex algorithms were developed to validate the accuracy of the data captured from the form. If data cannot be validated automatically, it is presented to an operator for key correction. During key correction, *Quick Modules* presents form images in their entirety on the left side of the screen (see photo above) while presenting a zoomed-in snippet of the form on the right side of the screen. The zoomed form snippet contains the data field needing correction. The operator keys the correct information directly from the image. If the keyed data matches the captured data, *Quick Modules* moves to the next suspect field or form. If not, the operator keys the data



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a second time. If the second keyed value matches the first, *Quick Modules* accepts the data and moves to the next suspect field.



Inset: *Quick Modules* screen with scanned batches on the left, the full image on the right and a pop-up window providing an alert for the scanner operator

Even with the large amount of handprint, some forms are processed with a high enough confidence level that they don't require any key correction at all. Other forms have anomalies like multiple shipping addresses, notes from the customer, or other items that are difficult for the recognition engines to decipher.

Once the forms are enhanced and the data is captured and corrected, the images are routed to a GUI based, *Quick Modules* balancing application that enables the operator to balance checks to orders. *Quick Modules* is capable of balancing both simple transactions – one check, one order form – and complex transactions with multiple forms or checks.

After balance, the check images are ready for deposit via either a Check 21 process or Accounts Receivable Check (ARC) process. Finally, *Quick Modules* uploads images and data to the Collections mainframe for order processing and

accounting. After a short waiting period, Collections shreds the paper copies of forms and checks.

"We worked very hard with Collections Etc. to satisfy their unique requirements," said Jerry McMunn, VP of Sales for Fairfax Imaging. "It is a testament to the modularity and flexibility of the *Quick Modules* product that we were able to tailor its functionality to accomplish what Collections Etc. needed. These same modules form the basis of our extensive mail order pharmacy systems."



Documents and checks are a blur as they speed through the IBML ImageTrac III scanner transport

Fairfax Imaging, Inc.

Headquartered in Tampa, Florida, Fairfax Imaging, Inc. is a leading provider of forms and financial document processing solutions. Established in 1994 with offices in California, Illinois, Maryland, Tennessee, Texas and Virginia, Fairfax Imaging develops its own processing software *Quick Modules*. *Quick Modules* is a highly successful and award winning forms and remittance processing solution. Currently *Quick Modules*' systems are processing billions of dollars in payment items and millions of transactions per year; across many industries, both government and commercial.

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