

Document Enterprise Content Manager



EASY ONLINE CONTENT MANAGEMENT FOR YOUR STAFF AND YOUR CUSTOMERS

The need for businesses to identify ways to improve the quality and speed with which they manage customer documents, images, and files is an ongoing issue.

Time spent searching for and organizing files, the inability to efficiently address customer inquiries in a timely fashion and excessive reprinting cost, are common complaints from organizations that keep their important business information stored as hard copies.

“Employees spend an average of 30 hours per month searching for documents, reproducing documents or creating redundant ones.”

To address these issues, organizations must embrace new content management tools, technologies and processes to efficiently deliver easy, secure and instant access to online documents on time so that they can meet the expectations of their customers and staff alike.

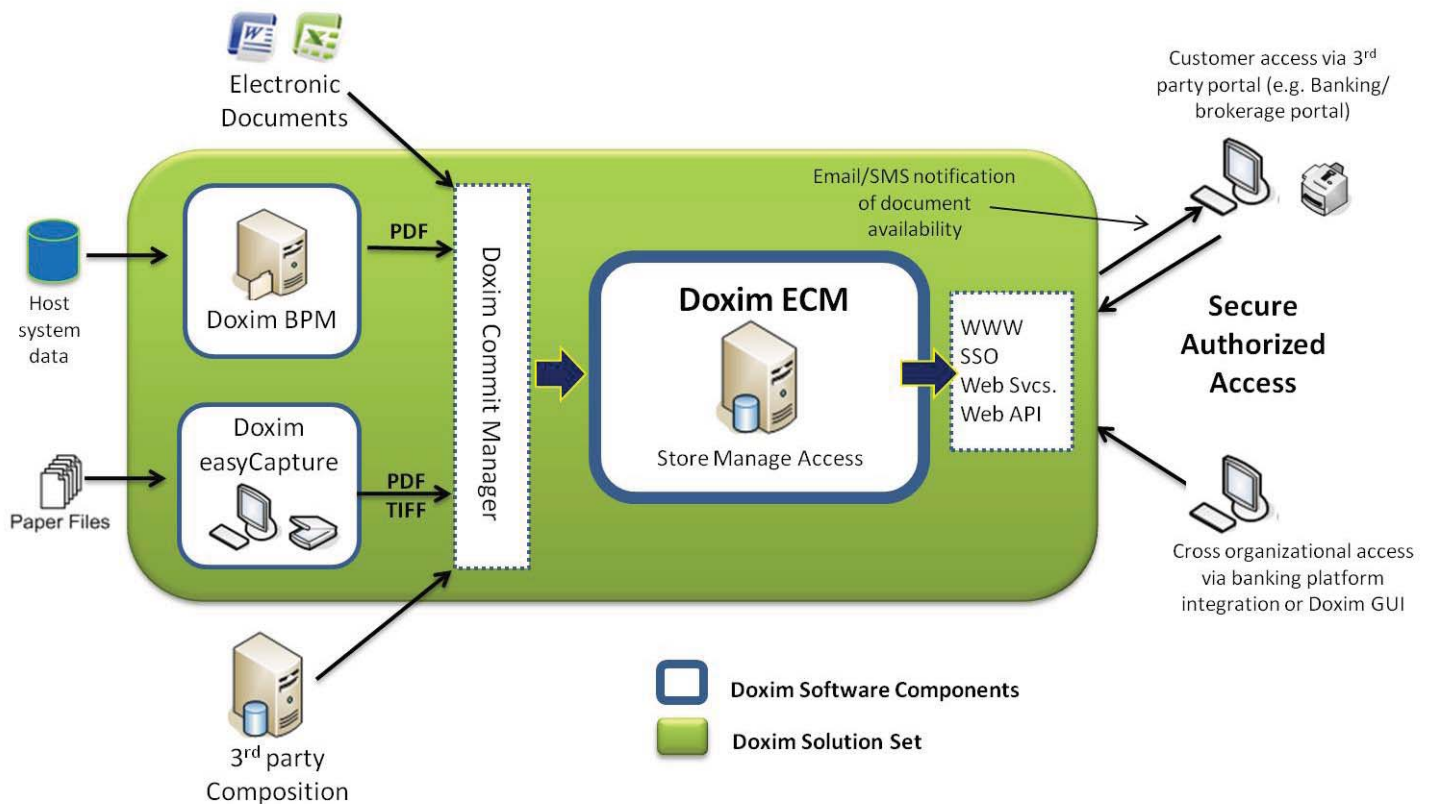
Doxim works with hundreds of organizations to help them streamline and manage business processes, strengthen communications, improve information access and reduce the expense, effort and environmental impact associated with document workflow, delivery and archiving.

LEADERSHIP, EXPERTISE AND EXPERIENCE

Doxim is recognized as a leading provider of ECM solutions, with tools built specifically for the unique archiving, workflow and image capture requirements of Financial Service Providers - at a price point that enable you to provide cost-effective document services to your customers. Even more importantly, Doxim leverages a tried and tested implementation process. Using a tailored combination of consultation, training, rollout roadmaps and change management techniques, we ensure that your internal adoption of Doxim technology is smooth, efficient and effective.

THE DOXIM DIFFERENCE

- Industry Leadership - Over 300 Financial Service Providers leverage Doxim ECM
- Proven Technology - Hundreds of roll outs and thousands of solutions delivered
- Affordable Pricing - Allowing small and mid-sized organizations to enjoy the benefits of Doxim ECM
- Domain Expertise - Doxim has been laser focused on the Financial sector for over a decade
- Service Excellence - Our customers demand it and we believe it's essential for long term success



Doxim Enterprise Content Manager - How It All Comes Together

DOXIM ENTERPRISE CONTENT MANAGER (ECM)

Doxim ECM is a comprehensive, web based, enterprise content management solution that enables organizations to easily capture, store, search and share all internal documents, files and customer information – safely and securely via an online repository. Doxim ECM enables businesses to:

- Streamline document storage and retrieval across all departments and branches
- Speed up operations by automating business processes and decisions, increasing employee productivity, while reducing costs
- Improve customer service levels, expand customer service offerings, and enhance customer interaction via self-service capabilities
- Ensure document and content security and access rules are maintained in accordance with regulatory mandates
- Employ effective disaster recovery and business continuity strategies
- Contribute more effectively to key corporate environmental mandates

DOXIM ECM KEY FEATURES INCLUDE:

A Centralized, Fast and Flexible Archive

Doxim ECM provides a centralized, secure, web based and highly scalable document archive that helps you consolidate and share documents, both internally and with customers. With Doxim ECM, you can:

- Improve staff efficiency by eliminating the need to search through hard copy filing to find a document
- Enhance customer service responsiveness with instant online document access
- Eliminate the cost of long term hard copy document storage
- Provide customers with self-service document access through customer web portals
- Streamline access to document storage of all types of content including statements, check images, invoices, loan applications, Know Your Customer documents, board packages, and other internal documents.

Advanced Permissions and Security

Doxim ECM allows you to decide who can view, modify, create, delete and administer documents and content at both user and group levels. You retain complete control and determine how information is accessed, according to your business rules. The result is a robust, flexible, completely secure content management system.

Rapid Deployment, Hassle-Free Maintenance

Doxim's Professional Services team ensures that you get up and running quickly. With our extensive project expertise and hundreds of roll outs, you benefit from our knowledge every step of the way. Doxim's unique, multi-tenant Cloud Computing platform lowers the barrier of entry to content management, allowing you to manage both your content and your IT budget intelligently.

You can also benefit from:

- Zero infrastructure required from your IT department
- Enterprise class content management at an affordable price
- Rapid deployment and ramp up
- Highly scalable platform that will accommodate business growth

Customer Commitment & Industry Expertise

Doxim is committed to helping your organization leverage the power of Doxim ECM to streamline document intensive processes, increase efficiency and reduce costs. Our professional services team has extensive business and regulatory knowledge and is here to help you achieve your own particular document management objectives.

Seamless Integration With Existing Systems

Doxim ECM integrates easily with all existing back end systems including banking platforms, online banking portals and account and loan origination systems. Your infrastructure and processes needn't change. Using our open API and advanced web services support, we'll ensure that the business critical systems that need to work together will do so – smoothly and without a hitch.

NOT JUST SIMPLE DOCUMENT MANAGEMENT

Many organizations will first experience Doxim ECM through the implementation of an eStatement initiative. While this alone presents a significant value, this is just the beginning.

Doxim ECM presents many other opportunities to eliminate manual tasks and streamline your document processes. Doxim offers a full range of ECM based solutions that can be leveraged to help your business efficiently implement electronic document consolidation and improve document related business processes.

These task-focused, software-based solutions are backed by an extensive choice of services that will help you move from time-consuming, paper-centric manual systems, to a responsive, web-based alternative that adds real value to your business.

DOXIM SOLUTIONS

eStatements

Doxim eStatements is a complete solution that allows customer statements and checks to be created and uploaded for online viewing. By providing customers and staff with quick, convenient and secure web based access to eStatements you will improve customer service and convenience, increase productivity and reduce costs associated with printing and mailing statements.

Better Looking Statements

Doxim Enhanced Statement Design and Composition converts difficult to read, unattractive statements into attractive, easy to read statements complete with integrated, targeted marketing messages. Better looking statements are easier to read and help communicate your marketing messages much more effectively to customers.

Document Imaging

Doxim easyCapture helps scan, index and upload hard copy documents to our secure online repository. This allows you to provide immediate, cross-branch access to customer documents, such as mortgage and loan documents and Know Your Customer files, via a secure, web-based archive.

Know Your Customer (KYC)

Using Doxim easyCapture coupled with Doxim ECM, it's quick and easy to capture key KYC information (e.g. signature cards and photo IDs) in electronic format and store it in Doxim ECM for online retrieval.

This helps streamline AML (anti money laundering) activities and increases staff efficiency by providing immediate, cross-branch access to KYC documents wherever staff customers are located. It also reduces the costs associated with hard copy storage of KYC information.

Paperless Lending

Doxim LOS Manager, integrated with an existing loan origination system (LOS), automatically uploads LOS documents to Doxim ECM. Doxim easyCapture can also be used to add hard copy loan documents (e.g. proof of employment), to the same electronic loan file. This helps to speed up the end to end loan process, saves staff time and makes loan documents available for easy, cross-branch access.

Check Processing

The Doxim Daily Check Processing service facilitates the daily batch processing of check images received from a clearing agent or service provider, uploading them in near real-time to Doxim ECM. This facilitates exception management processes as well as eStatement adoption, as check images are all available for easy appending to an eStatement PDF at month end.

eInserts and eNewsletters

Doxim eInserts allows insert materials to be appended to the end of an electronic statement for viewing online. The same capability can be used to append a newsletter to an eStatement. This saves all the production, storage, distribution and letter shop costs associated with hard copy inserts and newsletters. It also allows customers who have opted out from paper statements to still see and act on promotional materials.

Board Packages

Doxim Board Packages makes it easy for organizations to quickly upload and share all board documents, materials and correspondence online with board members through Doxim ECM. This saves staff time collating content and reduces the postage and print costs associated with board package distribution.

Doxim Inc. provides a full suite of enterprise content management products and services that together provide a web-based alternative to the printing and mailing of customer-centric documents such as statements, reports, client records, cheque images and transaction records.

Doxim serves the financial services marketplace across North America, with over 300 clients in banking, credit unions and investment brokerage. These organizations work with Doxim to improve their client communications, streamline document access, meet compliance requirements, and reduce the expense, work effort and environmental impact associated with the creation, delivery and archiving of business critical documents. Doxim is a SAS 70 and CICA 5970 certified organization.

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