

Statement Solutions for Credit Unions



FULL SERVICE STATEMENT PROCESSING, PRINTING AND E-DELIVERY SOLUTIONS

Doxim is the leading provider of document processing and content management services to Canadian Credit Unions. Backed by a deep understanding of technology, business and regulatory needs, Doxim has become the trusted provider for more Credit Unions in Canada than any other organization.

Established over a decade ago, Doxim today provides statement processing printing and eDelivery solutions to over 300 Canadian Credit Unions, coast to coast. We service these organizations both directly and indirectly through long term strategic partnerships with market leading service providers like League Data and Credit Union Payment Services.

Throughout this time, we have delivered exception levels of customer satisfaction, witnessed by a client retention rate which has consistently exceeded 97%, year in, year out.

WHAT WE DO

Doxim provides advanced statement composition and processing services using data from any core banking platform and outputs documents to both print and electronic formats for online access. Doxim supports a broad range of banking platforms from the following providers, including:

- Celero
- CGI
- Fiserv
- Infonancial
- Open Solutions
- SIT
- Smart Solution
- Temenos

SECURE-PRINT STATEMENT SERVICES

Doxim's comprehensive statement processing services respond to demands from the Credit Union community for an integrated end-to-end solution to help manage the production and delivery of regulatory documents and related communications, ensuring that all their important client communications are delivered securely, accurately and on-time.

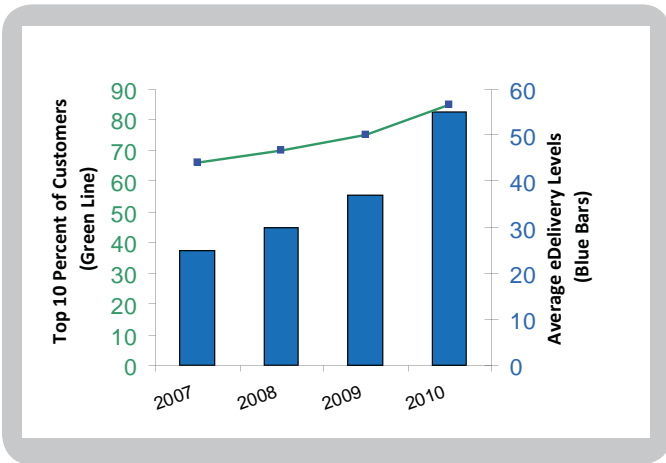
These services include:

- Data Conversion and Optimization
- High Speed Print and Electronic Document Production
- On-Statement Marketing Messages
- Cheque Image Management
- Collateral Inserting
- Colour Printing
- Differential Bundling and House-Holding
- Distribution Logistics and Hold Mail Services
- Secure Processing Environment

CHECK PROCESSING AND EXCEPTIONS MATCHING SERVICE

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

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1.1 - Doxim Clients eDelivery Data

STATEMENT E-DELIVERY

Today, more and more members want to opt-out of printed statements. To accommodate this, Doxim offers advanced eDelivery services via its cloud-based ECM platform. Unlike traditional print service providers, we take the task of driving eDelivery adoption very seriously. This is evidenced by the fact that, on average, Doxim clients enjoy 55% eDelivery levels, almost four times the average of other financial institutions. And our top ten percentile of Credit Union clients exceed 85% print statement opt-out.

Using Doxim ECM, banking staff can quickly and easily access statements and other document online using single sign-on via their banking platform. Doxim ECM also interfaces seamlessly with online banking portals, such as MemberDirect™, making it easy for members to access statements, cheques and other documents online, where and when they need them.

VALUE ADDED STATEMENT SERVICES

Because we're focused on providing the very best in statement products and services, Doxim offers a broad range of value added statement solutions beyond simple processing, print and eDelivery.

Better Looking Statements

Our Enhanced Statement Design and Composition service converts difficult to read, unattractive statements into attractive, well laid out statements complete with integrated, targeted marketing messages. They are easier to read and help communicate your content more effectively to members.

The enhanced statement example includes a 'what's on your wish list?' banner for Vehicle Loans, a contact us section with a photo of a branch manager, and a detailed account summary table.

Category	Amount
Chequing & Savings	5,036.68
Chequing & Savings USD	554.18
Terms	39,750.00

1.2 - Doxim Enhanced Statement Examples

Statement Solutions

Personalized Statement Marketing

Personalized Statement Marketing is an innovative offering that enables credit unions to improve the effectiveness of their marketing campaigns, and reduce the costs associated with pre-printed inserts, by placing targeted, relevant marketing messages directly onto statements in both printed and electronic formats.

eNewsletters & eInserts

eNewsletters & einserts allows newsletter and/or insert content to be appended to the end of an electronic statement so that it can be viewed online (as one document, contiguous with the eStatement). eNewsletters and/or einsert content is dynamically appended to the statement when the PDF of the eStatement is opened. This ensures that members who have opted out of print statements continue to receive these important communications.

In-line Inserts/Newsletters

We can also print Inserts and Newsletters in-line with statement itself, so that they become an integral part of paper statements that are delivered by mail. This saves money, by avoiding the need to print, distribute, fold and insert these documents as separate items along with the printed statement.

Data Insertion and Merging

Data insertion allows supplementary data to be added to the statement data stream before processing. This makes it possible to do things like adding a MasterCard Airmiles points balance directly to a statement.

Data Merging allows two separate print streams to be merged together post processing, pre-printing/ output. This makes it possible to merge two documents (e.g. a year-end Bonus share certificate and a December statement) so that they can be mailed out in one vs. two envelopes.

Enhanced Statement Security

By deploying 2D barcode technology, we can manage advanced document processing options, like printing a logo, address and marketing messages onto closed window envelopes, providing greater security and integrity of the statement content.

LOOKING BEYOND THE STATEMENT

Working closely with Credit Unions to help them with document processing and output has allowed us to gain a deep understanding of their overall document needs. This has driven the development and launch of many other eDocument-centric products and services, that leverage the power of the Doxim ECM online document repository, including:

- Paperless Banking Reports
- Document Imaging Solutions
- eDocument Access via Web Banking Portals
- Electronic Board Packages
- Year-end Tax Form Processing

Contact us at info@doxim.com or **905.475.9876** to find out more, or visit us online at www.doxim.com.

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.

