

eDocuments



As more customers move to the online channel to transact and interact with their service providers, it is essential that the assets you provide to them, such as business critical documents, are accessible online. Not only does this enhance the total customer experience, but it alleviates the resource strain on customer service personnel within your organization.

Doxim's range of eDocuments solutions allow organizations to seamlessly integrate documents uploaded to the Doxim Enterprise Content Management (ECM) repository with their own online customer portal. This allows your customers to gain secure online access to an array of documents relevant to your ongoing relationship with them, including:

DOXIM ENTERPRISE CONTENT MANAGEMENT (ECM)

Central to our eDocuments offering is Doxim ECM, a comprehensive, web based (SaaS), enterprise content management solution that enables organizations to easily capture, store, search and share a broad range of business documents – safely and securely via an online repository.

- Contracts
- Bills
- Statements
- Pay stubs
- A/P Invoices
- Tax Forms

Documents can be added to Doxim ECM in three ways:

- Directly uploaded in batch format – ideal for bills, statements, pay stubs, etc.
- Scanned, indexed and uploaded – ideal for all your hard copy documents
- Directly uploaded via the Doxim user interface – ideal for newsletters, notices, etc.

Offering full support for web services, and a comprehensive and flexible API set, Doxim ECM can be quickly and easily integrated with your existing customer portal environment to expose selected documents to your customers online.

DOCUMENT PROCESSING AND TRANSPROMO

Doxim ECM also integrates seamlessly with Doxim Business Process Manager (BPM), which automates the management of document composition, conversion, routing and output, from the time files are collected and marshalled from a core system, through to the time that files are printed and/or readied for upload to Doxim ECM. Doxim BPM also facilitates the creation of enhanced bills and statements, incorporating multiple transpromo elements that support cross sell and up sell to customers.

PROACTIVELY INFORM CUSTOMERS WITH ENOTIFICATION

Doxim eNotification enables your organization to notify your customers by email as soon as documents are uploaded and therefore ready to be viewed online via your customer portal. These eNotification messages can also include customized marketing content that speaks directly to your customers.

QUICK AND EASY DEPLOYMENT

Being SaaS based, Doxim ECM is both affordable and easy to deploy. And, because there is nothing to install and manage onsite, IT involvement is minimized.

Doxim's Professional Service team will work closely with your organization to help implement Doxim ECM as well as integrate the eDocuments API with your own portal environment. Once this is completed, you can expose any type of document or file that you have placed in the Doxim ECM repository to your customers via your web portal.

BENEFITS OF EDOCUMENTS

The benefits that an eDocument solution brings to your organization are both numerous and tangible:

Increased Revenue

By leveraging the powerful transpromotional capabilities of the Doxim BPM platform, you can take advantage of enhanced document design, which allows you to add multiple targeted marketing messages and creative ads to bills and statements, letting you:

- Use these documents as interactive marketing tools
- Cross sell and up sell customers on your service offerings
- Eliminate print, distribution, storage and lettershop costs of inserts
- Provide opportunities to partners, advertisers and sponsors for valuable ad impressions

Cost Savings

One of the most appealing aspects of a cloud computing solution like Doxim ECM is how it can very quickly generate measurable savings that pay for the initial investment. Typical areas of cost saving include:

- Print, lettershop and mail – the more documents you eDeliver, the more you save
- Operational efficiencies – customer service costs drop significantly when your CSRs (and customers) can access documents online vs. manually.)
- Document storage – less paper means office space is freed up for other activities

Enhanced Customer Service

The desire for improved customer service is often the driving factor behind the adoption of enterprise content management. Electronic documents and online content management offer several benefits in this regard:

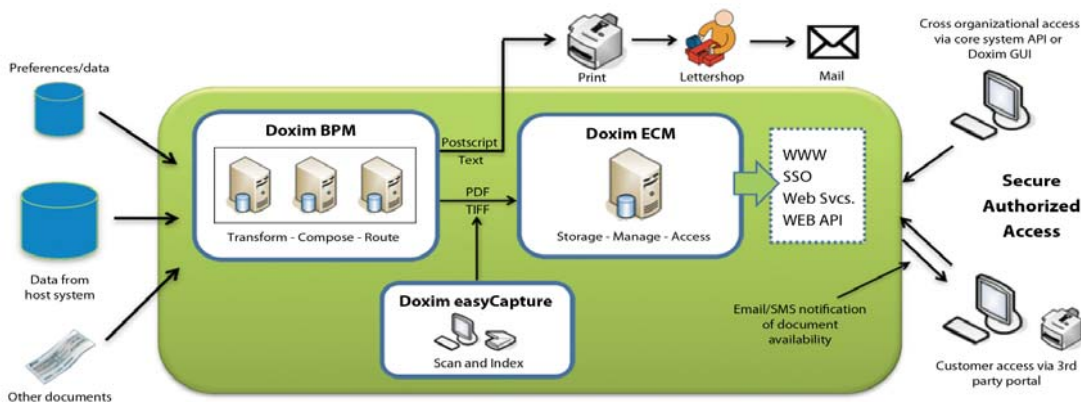
- Inbound inquiries can be dealt with more efficiently, and closed in one call
- Better looking documents elicit fewer questions and improve customer satisfaction
- Self-service convenience allows customers to do more online

Support for Corporate Green Initiatives

Many organizations allow at least some business decisions to be guided by a desire to reduce their carbon footprint. Some are responding to customer demands. Others see reduced green house gas emissions as a competitive advantage. Some simply arise from corporate social responsibility mandates. Whatever your reason, converting document-based business processes from paper to electronic can be a major boost to a green strategy. Top level benefits include:

- Reduced paper usage saves trees, a major carbon sink
- Reduced printing and mailing consumes less energy and lowers carbon emissions
- Reduced need to reprint documents, further reducing your carbon footprint
- Reduced maintenance associated with storage of paper documents

Doxim Product Suite



Doxim 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, trade confirms and transaction records. Doxim products and services are used by thousands of clients in the banking, credit union and wealth management sectors and by millions of end users across North America. 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.

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