doxim®

Doxim Business Account Opening

In-branch and Self-Serve Engagement

Open More Business Accounts, FASTER

Acquire and convert business customers faster than ever with the Doxim Business Account Opening solution. With our end-to-end digital account opening solution, you can take banking directly to the fingertips of the small businesses and corporations you serve.
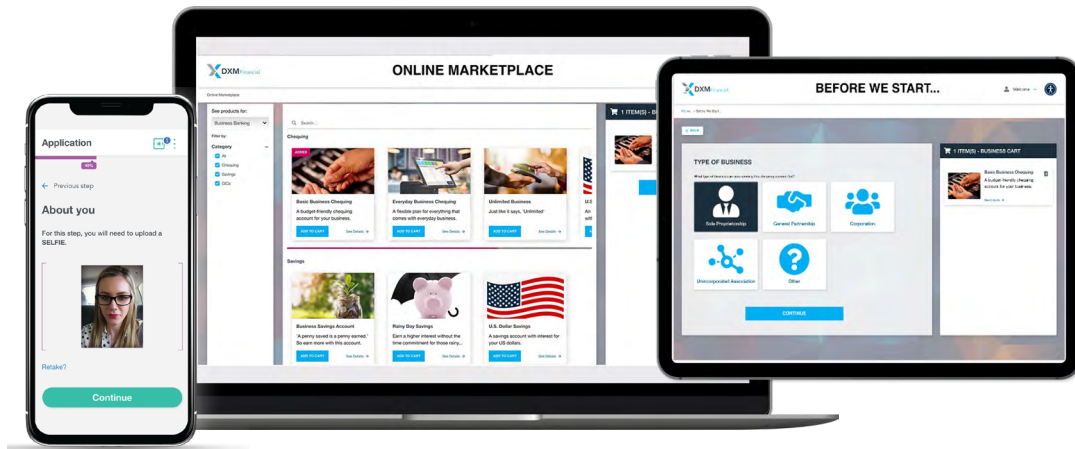
Our state-of-the-art solution blends customer centric, mobile-first design with robust functionality to create a frictionless user experience.

At Doxim, we've gone beyond the basic form-fill. Our best-in-class digital business account opening software uses dynamic, data-driven workflows that are based on business structure and policy to limit redundancy and streamline the account opening process. Now, your customers can go from application to real-time ID verification and authentication, all the way through to funding in 10 minutes or less.

Instant Business Account Opening that is Guaranteed to Leave a Great First Impression

A Robust Set of Features for All Your Business Account Opening Needs

- Open any account for any business type
- Open multiple retail and/or business accounts in a single flow
- Omnichannel support – online, phone or in-branch
- Easy document upload and storage with the in-app document bank
- Real-time ID and business verification
- Real-time KYB/KYC FINTRAC compliance
- FINTRAC compliance for multiple Director/Officer KYC requirements
- Data entry error validation
- Mobile phone account & device verification
- Facial & social biometrics
- Fraud prevention through AI-based user scoring
- Save & resume functionality

- Recover and resume abandoned applications
- Shopping cart functionality for multi-product support
- Self-service document template management
- Real-time funding through credit card, EFT and Interact
- Real-time credit scoring and credit report generation
- Instant approvals and intelligent auto-adjudication
- Real-time data upload to core banking
- Electronic signature support
- Account feature switching for direct deposit and recurring payments
- Configurable to meet FI branding requirements
- Integration with the other modules in the Doxim CEM platform (Loan Origination, CRM) as well as Doxim ECM and Email Marketing

Business Account Opening in Under 10 Minutes

Omnichannel Banking When & Where Your Customers Want

With complete real-time integration between in-branch and self-service solutions, Doxim offers a fully featured omnichannel business account opening toolkit that eliminates the burden of multiple branch visits. Financial institutions can offer their customers the convenience of banking 24/7, from anywhere, using the channel of their choice, whether it's online, mobile or in- branch.

Experience Rapid Deposit Growth

Expand your footprint beyond physical branch locations and capture new market share. Doxim Business Account Opening equips your acquisition team to engage, take action, and convert web-traffic leads immediately, resulting in shorter lead-to-revenue times. And, if leads happen to abandon an application, do not worry. Lead details are captured in real time for immediate follow-up.

Intelligent Cross-Sell to Deepen Relationships

We don't just want you to open accounts, we want you to develop deeper, longer-lasting relationships that increase the lifetime profitability of each customer. Therefore, along with creating a seamless first experience, we also enable businesses to quickly add additional value-added products and services before completing the account opening process.

Document Management Made Easy

Liberate your staff from manual document management. At Doxim we understand the burden of managing hundreds of documents, that's why we've integrated with Doxim ECM to streamline the document management process. Doxim ECM provides a single, secure digital repository for document management and eliminates the burden of manual document collection and maintenance. Customers can quickly upload and maintain relevant documents directly into the in-app document bank, triggering an instant notification to staff for follow-up.

Fraud Prevention Without the Friction

Grow your customer base without sacrificing compliance and security. Doxim's AI-powered, fully managed digital self-service solution is designed to mitigate abandonment and maximize the number of good customers being onboarded. Unlike many solutions in the marketplace which require manual intervention and take days to ensure compliance and ID verification, Doxim leverages state-of-the art technology to provide instant verification.

Contact Us
Book a personal demo to see how Doxim Business Account Opening can help you open accounts faster while reducing costly errors and improving the customer experience.

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Doxim is the customer communications management and engagement technology leader serving highly regulated markets, including financial services, utilities and healthcare. We provide omnichannel communications and payment solutions that maximize customer engagement and revenue, while reducing costs. Our software and technology-enabled managed services address key digitization, operational efficiency, and customer experience challenges through a suite of plug-and-play, integrated, SaaS software and technology solutions. Learn more at www.doxim.com.

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