doxim ®

Doxim
Enterprise Content Management Solution
Managed, Secure, Easily Accessible

A Secure Repository For Epresentment:
Enabling A Modern Customer Experience (CX)

End-to-End Solution for

- Create a single view of the customer documents and break organizational silos

- Stay up-to-date and fully compliant with regulations and audit requirements

- Deliver a modern CX, providing self-serve access to customer documents and e-notifications when new documents are available

- Create a single, centralized "one-stop-shop" for regulated customer documents of all types (statements, applications, tax documents, confirms, bills, invoices and more) and other internal workflow documents

- Digitize documents with eSignature capabilities and store them alongside other customer documents

- Eliminate the cost of printing, mailing, and long-term hard-copy document storage

- Streamline document storage and retrieval across all departments and branches

- Improve staff efficiency by eliminating the need to search in multiple locations

- Contribute to key corporate environmental mandates

- Eliminate costs related to printing, couriering, and long-term hard copy document storage

Doxim ECM is a cloud-based repository that manages your regulated customer documents securely and compliantly, but it was purpose-built to fuel a modern digital CX – enabling fast, easy ePresentment through seamless portal integrations. By default, it securely stores documents generated by Doxim's Customer Communications Management Platform (Doxim CCM) and Customer Engagement Solutions (CRM, Origination & Client Onboarding), but it is flexible enough to manage and centralize all your customer documents.

In today's work environment, managing regulated customer documents has never been so important, yet so complex. You need to stay compliant with new and changing regulations to reduce your risk, while ensuring your customer documents are easily accessible to drive business value.

Providing easy, online access to customers' documents through a secure customer portal is essential for delivering a modern CX and staying competitive. In addition, providing your staff with rapid access to these same customer documents improves customer service levels and reduces operational costs.

Doxim ECM Delivers

Doxim Enterprise Content Management (ECM) is purpose-built for key business use cases – enabling you to securely manage, yet easily share your regulated documents with customers and staff via web portal interfaces. It is a modern, cloud-based content management solution that provides:

- **Secure, compliant storage** – documents are managed with robust security and compliant handling throughout the document lifecycle to eliminate unauthorized access, theft and loss

- **Sharing and ePresentment** – customers and staff can gain fast, online access to their documents via web portal integration

Manage Documents Securely and Compliantly

You can rest assured documents stored in Doxim ECM are managed securely and compliantly in our state-of-the-art data centers:

Advanced Permissions and Security

You decide who can view, modify, create, delete, and administer documents and content at both user and group levels. As documents are added to the system, user and group permissions are assigned automatically based on the rules you've established. The result is a robust, flexible, completely secure content management system.

Doxim ECM also makes it easy to meet your compliance and security requirements by making a full suite of document and user access reports available to your administrators.

Document Versioning

Document versioning gives you the flexibility to access previous versions of the file and revert to them, as needed. A detailed record of file changes and file activity are logged and retained in perpetuity for compliance.

Records Management

You can classify documents within Doxim ECM and apply records management rules in accordance with your policies to ensure documents are managed securely and compliantly for the appropriate length of time, then flagged for destruction and purged when they are no longer needed. In this way, you comply with regulations, while actively managing your document storage costs.

Enable Secure Sharing and ePresentment

With documents safely and securely managed, you can unleash them to fuel modern processes and enable easy access by customers and staff alike. Our RESTful APIs make portal integrations easy, enabling fast, secure online access to documents anytime, anywhere, using any device – directly through:

- a Doxim-hosted portal
- your existing customer portal
- a third-party portal
- your internal staff document portal

Document self-service satisfies modern customer expectations for on-demand access, while reducing your print costs and decreasing the number of calls to your front office. When customers do call, integration with your staff portal will boost your operational efficiencies by helping staff quickly locate key customer documents.

Create a Centralized Content Hub for Customer Documents

Having a single, centralized view into customer documents of all types and origins can deliver significant efficiencies and value. Many of our customers use Doxim ECM for this purpose. This flexible repository can manage files of any type. It can easily provide your staff with a single location and fast access to documents, while increasing the volume and variety of content served to customers through your customer portal. As you add more documents, you realize greater value.

eSignature Documents

Instead of storing paper versions of signed documents in a filing cabinet, you can digitize them using the Doxim eSignature Solution and store final documents electronically in Doxim ECM – for more secure and efficient handling and storage. Our fully integrated workflow lets front office staff upload documents to the Doxim ECM, then kick off an eSignature workflow that routes the documents to your eSignature vendor and returns them fully signed into the ECM. The signed documents can be accessed by authorized users and exposed to customers via integration with any client facing portal. We integrate with leading eSignature vendors DocuSign™ and OneSpan™.
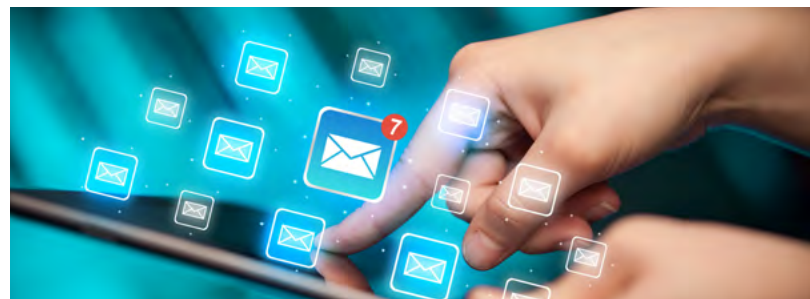
Tax Documents

Each year, many customers eagerly await their tax documents and the notification of expected tax payments or refunds. You can delight customers with quick uploading and timely delivery of e-tax documents through your customer portal.
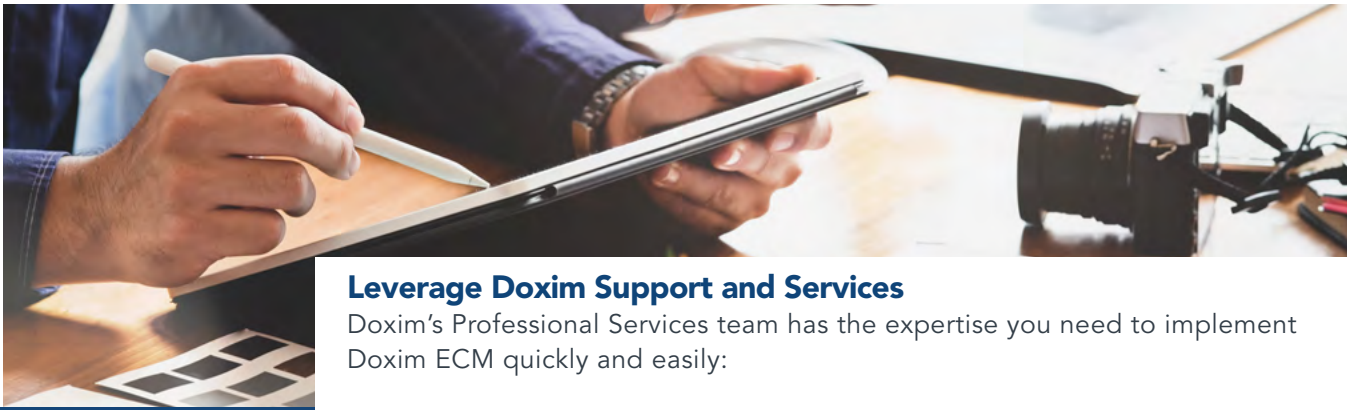
Workflow Documents

You can add a variety of printed or digital workflow documents to the ECM using Doxim Imaging. Scan and bulk upload printed or digital invoices, quotations, HR documents and much more. This solution makes it easy to leverage Doxim ECM as your single, centralized hub for customer documents.

Digital Notification

When batch files are uploaded to Doxim ECM, you can instantly send customers an email notification – informing them the file is available and providing a direct link. Providing customers with instant and personalized information is key to a modern CX.

A Cloud-Based Repository for the Doxim Platform

- Multi-tenant SaaS solution

- Completely browser-based; zero infrastructure required from your IT staff

- State-of-the-art data centers, managed by Doxim

- Rapid deployment and ramp-up

- Web services and RESTful API

- An easy to understand and use administration system

- A highly scalable platform that will accommodate business growth

Leverage Doxim Support and Services

Doxim's Professional Services team has the expertise you need to implement Doxim ECM quickly and easily:

Rapid Deployment, Hassle-Free Maintenance - With our extensive project expertise and hundreds of rollouts, you benefit from our knowledge every step of the way. Doxim's unique, multi-tenant SaaS platform lowers the barrier of entry to enterprise content management, allowing you to manage both your content and your IT budget effectively.

Seamless Integration with Existing Systems - Doxim ECM integrates easily with your existing back-end systems including your industry-specific core systems, such as banking and brokerage platforms, as well as online portals and account and loan origination systems. Your infrastructure and processes need not change. Using our open API and advanced web services support, we'll ensure all the business-critical systems that need to work together will do so.

Better Looking Statements – Doxim-enhanced statement design and composition converts difficult to read, unattractive documents into engaging, easy-to-read statements complete with integrated, targeted marketing messages.

Redundancy - Our cloud-based ECM ensures documents are easily accessible in times of crisis. We can help you leverage Doxim ECM for effective disaster recovery and business continuity purposes.

Consulting – Don't see what you're looking for? Doxim staff have deep technical and industry expertise to help you streamline and manage your business processes, strengthen communications, improve information access, and reduce the expense, effort, and environmental impact associated with document workflow, delivery, and archiving.

Let's Talk
Contact us to discuss your requirements today.

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Doxim is the customer communications and engagement technology leader serving financial and regulated markets, providing omnichannel document solutions and transforming experiences to strengthen engagement throughout the entire lifecycle. The Doxim Customer Engagement Platform helps clients communicate reliably and effectively, improve cross-sell and upsell opportunities, and drive increased loyalty and wallet share through personalized communications. The platform addresses key digitization, operational efficiency, and customer experience challenges through our suite of plug-and-play, integrated, SaaS software and document technology solutions. Learn more at www.doxim.com.

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