doxim®

Doxim Account Opening

Fast, Easy, Omnichannel Account Opening in 5 Minutes Or Less

Your All-in-One Solution for Account Opening

Doxim Account Opening is a flexible, end-to-end digital account opening solution purpose-built for the needs of credit unions and community banks – providing in-branch and self-serve options for both retail and business accounts. From gathering all required information, to onboarding customers, to selecting desired products, to generating the required documentation using your own templates, the software streamlines and speeds every step of the account opening process.

Reduce Risk and Prevent Costly Errors

Incomplete paperwork, missing signatures, errors or bottlenecks during the approval process – all of these issues can complicate regulatory compliance and cost your organization time and money to address. With Doxim, you can reduce errors with mandatory fields for regulatory questions, intelligent reuse of data, and optional eSignature capability everywhere they're needed. Plus the solution provides a convenient way to capture KYC information, including background checks, risk assessments and other regulatory requirements.

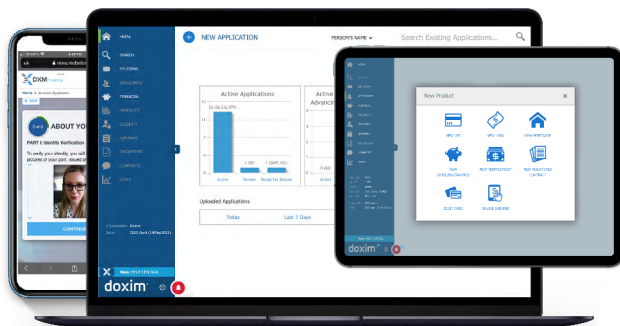### Open Accounts Anywhere, Anytime

Pair our in-branch and self-service account opening solutions together to enable customers to open accounts through the channel of their choice, when and where they want - whether it's online, in-branch, or via the call center. Not only that, but customers can easily switch between channels without having to repeat themselves.

Ecosystem of Integrations & APIs

From your banking core, to credit checking and reporting, to ID verification and eSignature management, Doxim's account opening solution has pre-built integrations to the key technology providers that make paperless onboarding possible.

Plus, the solution comes with a complete set of pre-built integrations to other solutions in the CEM platform as well as to Doxim ECM, DBM and more. APIs also expose the solution's data fabric allowing you to integrate and streamline workflows with other systems, accelerating the path to innovation and efficiency.

Increase regulatory compliance

Open multiple products in a single pass

Open accounts, anywhere, anytime

www.doxim.com   Info@doxim.com   866 475 9876

Doxim Account Opening
For Banks & Credit Unions

Features	Included	Add-on	3rd Party Subscription Required
Account Opening & Management			
Account opening for individuals and joint applicants	✓		
Open any account type (checking/savings, registered accounts along with debit card)	✓		
Prepare a single application for multiple accounts in a process flow	✓		
Add debit cards in-app	✓		
Create digital banking profiles	✓		
Regulatory Compliance			
Full application audit trail	✓		
Capture information on politically exposed persons and third parties	✓		
Real-time identify verification (IDv) through FIS ChexSystems (US only)	✓		✓
Customizable due diligence questionnaire	✓		
Real-time credit scoring and credit report generation (TransUnion, Equifax)	✓		✓
Address auto-complete & verification		✓	
Product Configurability			
Configurable decision engine and pricing matrix	✓		
Configurable mandatory fields per your business needs	✓		
Configurable product types (chequing/savings, registered products and debit cards etc.)	✓		
Document Management Powered by Doxim ECM			
Configure, manage and add document templates in-house	✓		
Preview and in-line edit documents (PDF documents only)	✓		
eSign multiple documents at once		✓	
Complete document history and versioning	✓		
Secured storage, document search and purge policy definition	✓		
Reporting			
Multi-level dashlet views - at the agent, branch or institution level	✓		
Track in-progress applications	✓		
SQL server database extracts		✓	
Doxim Self-Service Account Opening			
End-to-end digital account opening for individuals & joint applicants		✓	
Real-time ID verification, funding and approvals		✓	
Omnichannel support to so customers can seamlessly switch between channels		✓	
Open multiple types of accounts in a single flow		✓	
Multi-product workflow that dynamically adjusts based on product selection		✓	

Features	Included	Add-on	3rd Party Subscription Required
Pre-Built Integrations			
Integrations for Doxim Loan Origination, Doxim CRM, Doxim ECM	✓		
In-app integrations with third-party service providers (TransUnion, Equifax)	✓		✓
Real-time data upload to core banking systems	✓		
Electronic signature support through OneSpan and DocuSign		✓	
Modern Interfaces			
Intuitive, web-based user interface optimized for desktops and tablets	✓		
SaaS deployment	✓		
Origination RESTful API		✓	
API for auto-decisioning applications & uploading/push to banking core system		✓	
API for applications via (applicants, financial, security)		✓	
API for documents and eSignatures		✓	
API for creating and managing sales opportunities via CRM		✓	
Single sign-on through Azure AD		✓	✓

See Doxim Account Opening in Action

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

Book A Personalized Demo

doxim®

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.