Doxim CCM

Doxim CCM Admin Portal (DAP) for Client Self Service

Empower Business Users with Control Over Key Aspects of Communications

Doxim experts manage your regulated customer communications without fail in our state-of-the-art production facilities - providing the quality, compliance and on-time delivery you need and expect. Through our self-serve client portal, we provide a gateway into that managed process, giving you control over key aspects of your communications for increased speed, agility, and insight.

The **Doxim CCM Admin Portal (DAP)** is a centralized access point to the Doxim CCM features, where your business users can:

- **Create, configure, review, and approve** transactional communications before composition and delivery
- **Manage templates and assets**, for quick market updates and to drive consistency across communications
- **Get a single view of the customer** for a streamlined response to support inquiries
- **Send urgent and impromptu communications**
- **Administer payments** and reconciliation (connecting to our biller portal for end-to-end processing)
- **Get reports and insights** on the status of documents and communications, customer engagement and more

Simplified Process & Control for Operations & Billing

The DAP delivers an easy-to-use interface allowing users in operations and billing to directly access key tools and reports:

- Manage document templates and configuration
- Manage omnichannel digital notifications
- Access dozens of operational reports on deliverability, status, and customer interactions with communications
- Manage exceptions, holding and reviewing to validate billing data accuracy before composition and delivery

Single View & Customer Engagement for CSRs

Providing a single source of truth for customer data is essential for delivering great customer experiences. Through the DAP, customer service representatives (CSRs) can improve the outcomes of customer inquiries with:

- A single, holistic view into the customer account, including engagement history and related documents
- Ability to view and administer the customer account profile and communications preferences
- Secure in-portal messaging for real-time, two-way communications and responses to customer inquiries

Marketing Solutions, Personalization, Asset Management & Engagement Insights for Marketers

With the DAP, marketers are empowered to directly create and deliver personalized messages and communications, without the help of IT. Doxim CCM also provides a multitude of touchpoints for marketers to deliver coordinated marketing campaigns. Marketers can:

- Add campaign content and personalized messages directly on statements, bills, and other regulated documents (onserts) or as inserts
- Include campaign content within the Customer Experience Portal (CXP)
- Use the fully featured Doxim Email Marketing solution to welcome, nurture and grow customer relationships
- Personalize communications for better customer experience and ROI on marketing
- Manage templates, assets, and content all in one place to ensure branding consistency
- Access reports and engagement analytics to understand campaign performance through different delivery channels

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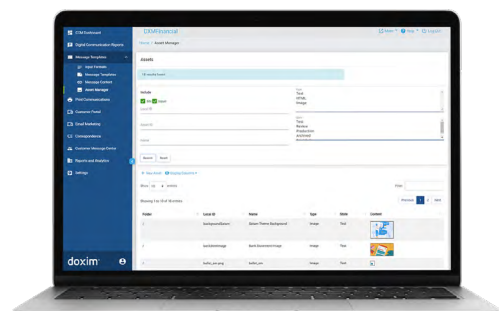
Doxim CCM Admin Portal
Empowering Business Users to Manage Omnichannel Communications at Scale

Features	Included
Operations	
Batch data upload and management (print, digital documents, digital messaging)	✓
Authoring, set-up of digital messages (email, SMS)	✓
Ability to review / preview communications prior to delivery	✓
Upload to ECM for secure archival and ePresentment in CXP	✓
Various print and digital communications reporting (delivery, engagement, etc)	✓
Billing	
Exception handling process to hold, review, approve data prior to composition	✓
End-to-end payment processing and reconciliation through biller portal	✓
Marketing	
Customer Experience Portal content and campaign management	✓
Digital engagement reporting	✓
Management of physical and digital inserts, document onserts and whitespace	✓
Email Marketing: CAN SPAM/CASL compliance, contact list management and segmentation, campaign reporting, a/b testing, dynamic content and more	✓
Digital asset management	✓
Customer Service Representatives	
Point- in- time official record of communications, engagement history, and documents (in Doxim ECM)	✓
Customer profile/preferences management	✓
Point in time official record of communications and documents (in Doxim ECM)	✓
Secure two-way in-portal customer messaging	✓
Ad-hoc customer document uploads	✓
Administration	
Roles based access to functions	✓
Integration	
API integration with core systems and other applications	✓
SSO (single sign on)	✓
Doxim Payment platform integration	✓

Book a meeting and we'll show you how Doxim CCM can empower your business users with self-serve communications management

Request 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 document and payment solutions that transform experiences and strengthen engagement throughout the entire lifecycle.

The Doxim CCM platform helps clients communicate reliably and effectively, improves consumer responsiveness and boost collection rates. The platform addresses key digitization, operational efficiency, and customer experience challenges through our suite of plug-and-play, integrated, SaaS software and technology solutions. Learn more at www.doxim.com.

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