



## Doxim CCM

### Exception Handling

#### Proactively Hold and Validate the Accuracy of Billing and Statement Data Before It Reaches the Customer

When you send bills or other regulated communications with incorrect data, this drives up your support calls and operational costs, it damages customer satisfaction, and ultimately, it delays any related payments, since a customer won't pay for incorrect usage or transactions.

To proactively address this situation, Doxim CCM Exception Handling is designed to read details in your data file and pull accounts, based on the criteria you set, for review and verification prior to document composition and delivery. In this way, you can validate the billing and statement data is correct and accurate before it ever reaches the customer!

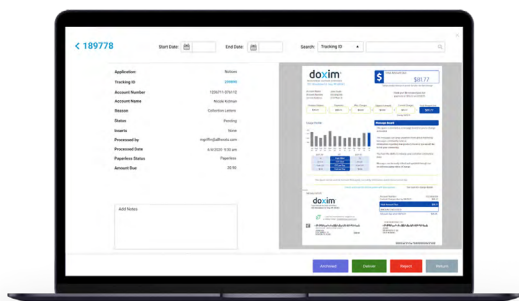
This solution is perfect for situations where...

- **Credits, Usage, or Charge Thresholds** are greater than a standard amount per rate class
- **Current Charges or Total Due** are greater or less than a standard amount for all rate classes
- **Unbalanced Bill Details** exist where data does not add up to the total amount due
- **Special Handling** is required (e.g. based on specific account numbers, or for corrected bills, city accounts, budget plan settlement month, final bills, etc)

#### Setting Criteria to Trigger a Hold and Review

As part of your client onboarding process, Doxim will create a custom set of criteria / rules related to any data element you want to use to trigger the exception handling process. This

**Doxim CCM Exception Handling lets you set criteria to trigger a hold and review - preventing incorrect data from reaching the customer.**



trigger can be a balance threshold, rate code or credit threshold or, if a specific customer has unique data requirements and requires special handling, you can trigger a hold for specific account numbers.

For added control, your business users can also select from standard rules presented to them in the Doxim CCM Admin Portal (DAP), which they can turn on/off as desired in the normal course of business.

#### System Processing

During document generation, our process automatically reviews your uploaded batch data and flags documents that meet your established criteria. These flagged documents are separated out, while the others will continue to process. Flagged and separated documents are precomposed and placed into the DAP's Exception Handling queue for your team to review.

#### DAP Exception Handling Queue & User Assignments

Within the DAP's Exception Handling queue each hold is assigned it to a specific user on your team, based on the reason for the hold and the user assignments you have created. At this point the assigned user works to:

- View the digital, precomposed image of the document,
- Disposition the document – for correction and return to the processing stream, or
- Reassign to another user.

- Increase data accuracy and eliminate errors
- Reduce support calls and costs
- Accelerate collections
- Reduce day sales outstanding (DSO)
- Improve overall customer experience and satisfaction

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## Features

## Included

### Criteria and Rules

Flexibility/ability to establish rules for any data element

✓

20 pre-configured rules

✓

Additional standard/default rules controlled by clients through the DAP

✓

### System Processing

Reads batch data records and flags in real time

✓

Splits flagged documents into separate job, with others to continue processing

✓

Filters documents for specific user based on User Assignments

✓

View digital image of pre-composed document

✓

Disposition action – Deliver, Reject, Archive or Return

✓

Bulk handling & disposition – for large sets of similar items

✓

### Administration & User Assignments

Roles based access to functions

✓

Assign exception items and reason codes to specific users

✓

### Integration

Available through the Doxim CCM Admin Portal (DAP)

✓

Book a meeting and we'll show you how Doxim CCM Exception Handling lets your business users proactively hold and review billing or statement data - preventing errors from ever reaching the customer!

[Request Demo](#)



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](http://www.doxim.com).