



Doxim Enterprise Content Management

**A Secure Repository for ePresentment:
Enabling a Modern Customer Experience (CX)**

Doxim Enterprise Content Management (ECM) is a comprehensive, cloud-based, secure document repository that is purpose-built for ePresentment—giving staff and customers a centralized location for accessing customer documents. It allows organizations to easily capture, store, search, and share their customers’ documents, files, and other regulated information safely and securely via seamless web portal integrations.

Increase Content Security and Compliance

With Doxim ECM, content security and access rules are maintained in accordance with regulatory mandates, and documents are backed up in state-of-the-art data centers. As documents are added to the system, user and group permissions are assigned automatically per established business rules.

Additionally, document versioning allows you to maintain a detailed record of file changes, and comprehensive log archiving ensures all activity is captured and retained in perpetuity to meet data retention requirements. Administrators also have access to a full suite of document and user access reports. These reports enable effortless compliance and simplify audit reporting tasks.

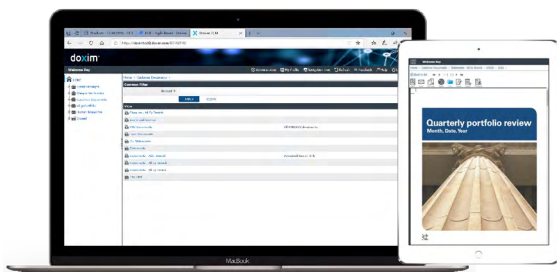
Improve Your Customer Service

With self-serve capabilities, your customers can access their documents such as eStatements anytime, anywhere, using any device—directly through your customer portal, a third-party portal, or through a Doxim-hosted web portal. By putting all relevant documents at the customer’s fingertips, organizations can reduce their customer service inquiries. Staff can also provide improved service with faster search and retrieval of documents.

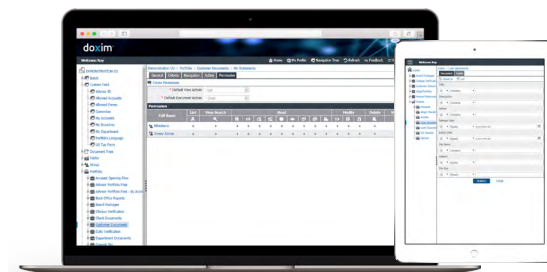
With Doxim ECM, your documents are secure and compliant...yet easily accessible

Quickly search and retrieve documents

Create comprehensive audit reports



Access documents anywhere, anytime



Provide accessible documents (ADA and ACA Compliant)

Integrate Seamlessly with Existing Systems

Doxim ECM integrates easily with your existing back-end systems including banking and brokerage platforms, online banking and brokerage 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 your business-critical systems work together seamlessly.

Centralize Content from Across the Doxim Platform

Doxim ECM brings together content from across the Doxim platform.

- Customer Communications Management (CCM) – Doxim ECM is a tightly integrated component of our CCM solution and is the default location where files generated by our composition process are stored. These transactional documents – primarily eStatements, confirms, tax documents and financial reports – are securely managed and easily shared with customers via portal integrations.
- Customer Engagement solutions – Doxim ECM also stores digitized versions of client documents generated from Client Onboarding and Account and Loan Origination – including new client applications, mortgage and loan applications, and more. These documents can be stored alongside the customers’ other transactional statements for rapid discovery and ePresentment to customers.

Doxim Enterprise Content Management

A Secure Repository Purpose-Built for ePresentation

Features

Included

Search & Retrieval

Query documents by navigating through configurable portfolios and views ✓

Search by document type metadata fields, or narrow down the search to a specific field ✓

24/7 access to all document types for staff so they can be easily shared across departments and branches ✓

Self-serve document access for customers through your portal or a Doxim web portal ✓

Speed & Flexibility

Centralized content repository for all document types ✓

Unlimited document type categories and metadata tags ✓

Customizable user experience ✓

A choice of mobile responsive HTML statements or PDF statements ✓

Document scanning and indexing capabilities to enable the digitization of hard copy documents ✓

Compliance & Security

Dynamic rules based access which allows financial institutions to decide who can view, modify, create, delete and administer documents and content at both user and group levels ✓

Document versioning which maintains a detailed record of files changes, and comprehensive log archiving ✓

User logs which record all actions taken in Doxim ECM ✓

Comprehensive audit reports which can be produced upon request or pre-scheduled ✓

Accessible Documents (ADA and ACA Compliant) through the Doxim Accessible Portal ✓

WORM (Write Once Read Many) Support ✓

Automatic retention management ✓

Data Security

Encrypted storage of documents at rest ✓

SOC1 and SOC2 compliant ✓

Integrations

Doxim Customer Engagement Platform (Doxim Document Factory, Document Imaging, CRM, Loan Origination, Account Opening, Client Onboarding, Business Analytics, Campaign Management) ✓

Business portal and third-party systems integrations (existing customer portals, intranets) ✓

RESTful API and Web Services Layer ✓

eSignature Support through OneSpan & DocuSign ✓

SaaS Deployment

Configuration access to new features ✓

Data centers located across Canada and USA ✓

Multi-tenant modules available for service providers ✓

Modern User Interface

Intuitive, web-based user interface ✓

Available anywhere the Internet is available ✓

Modern navigational components ✓

Ready to take your customer experience to the next level?
Book a personalized demo and see how Doxim ECM can help.

[Request Demo](#)

doxim®

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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