



Doxim CCM Interactive Documents

Deliver a Rich, Interactive Experience – Direct to Your Customer’s Inbox

You want to give your customers an engaging digital experience related to a claim, invoice, or statement – to increase satisfaction and accelerate time to pay. This experience is typically delivered via secure customer portal, but for clients with ‘one off’ or infrequent services, requiring the customer to create an account is not an ideal experience.

For ‘one off’ or infrequent engagement, Doxim Interactive Documents provides an ideal solution. It can replicate the portal experience – providing rich, interactive information and end-to-end engagement – all contained within the capsule of a PDF document and sent directly to the customer’s inbox.

Provide the Ultimate CX Without Compromising Security

Upon receiving the email that delivers the bill or document, the customer opens the secure PDF attachment, authenticates using the security key provided in the email, and gains access to a wealth of rich, personalized information and options for engagement.

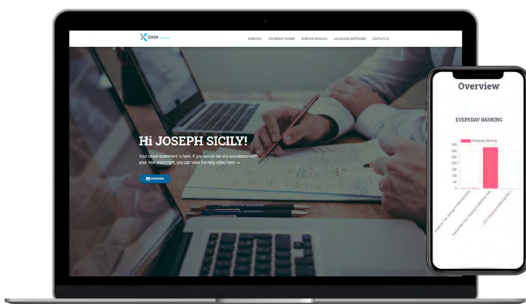
The data presented to the customer through this Interactive Document is delivered via Internet connection, resides on a secure Doxim server, and is managed in accordance with stringent security and compliance requirements.

Options to Enhance the Experience

You can augment the Interactive Document experience with several valuable options:

- eConsent – prompts the customer to opt-in or opt-out of digital/paperless delivery.
- eSignature process – includes a request for digital signatures. This process notifies you upon completion.
- Payment process – include links to a payment form, securely passing the customer to an external payment processor for completion.

Interactive Documents deliver rich information and engagement by secure email attachment.



- Simple, registration/account-free process
- Rich, interactive information – without compromising security
- Support for digital opt-in, eSignature, and payments
- Increases customer satisfaction, time to pay
- Reduces call center volumes & costs

Doxim Interactive Documents

Deliver a personalized, interactive, end-to-end customer experience by secure email attachment

Features

Included

Ease of Use

- Account-free and login-free process delivered by secure email attachment ✓
- Links customer via Internet to HTML document that can render on any device ✓
- Responsive and mobile friendly engagement ✓

Workflow & Data Management

- Interactive document is generated and stored in secure sandbox on Doxim server ✓
- Flat PDF with perma link is sent to customer via email attachment ✓
- Recipient opens email attachment, authenticates with security key provided ✓
- Document links to secure sandbox on Doxim server ✓
- Data injected into sandbox provides interactive HTML experience ✓
- Links for engaging Customer Service organization ✓
- Optional links to eConsent, payment process, eSignature ✓

Security and Compliance

- Each document is password protected; recipient must enter security key provided in email ✓
- Each Flat PDF document sent via email has a unique permalink to the server sandbox ✓
- Customer data is encrypted at rest using AES 256 and WORM compliant ✓
- eConsent process meets CAN-SPAM, CASL ✓
- Payment process meets PCI compliance - customer data is transferred directly from the document's payment form to the payment processor and is never held by Doxim ✓

Contact us to see how Doxim Interactive Documents can boost customer satisfaction, drive paperless adoption, and accelerate time to pay.

[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 Communication Management 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.