# EPRESENTMENT GATEWAY FOR BOX

Customer communications archiving and
ePresentment for Box

**CRAWFORD TECHNOLOGIES**

## OVERVIEW

### Business Issue

Each year an estimated 100 billion business documents are delivered in the US and Europe. These customer communications include statements, letters, invoices, policy documents, and many more document types that are essential in maintaining positive relationships with customers.

Business documents are produced by enterprise applications and document composition tools alike and are eventually stored in high volume archives and enterprise content management systems. These documents are often accessed through consumer portals and mobile applications, although 80% are still printed and posted.

Replacing printing and posting with digital delivery and "mobile first" are key parts of the digital transformation initiatives of large organizations.

### Solution

ePresentment Gateway for Box provides a customer communication and ePresentment and management service based on the Box platform. The solution lowers infrastructure costs and allows organizations to retire outdated archival and ECM system hardware and software. ePresentment Gateway for Box increases the value of content by expanding access to customer communications within an organization and through consumer portals and mobile devices. Managing customer communications in Box reduces litigation risks, and e-discovery and records management costs associated with content.

### Benefits

- On average organizations can save over $1m each year on the cost of print and postage by changing to digital customer communications e-presentment.

- Retaining statements, bills, invoices and correspondence is essential for compliance with industry regulations in banking, insurance and healthcare and for tax compliance.

- Optionally turning customer communications into accessible documents delivers consistent services for the partially sighted and ensures compliance with current regulations, including Section 508, AMA, AODA, the UK and EU Equality Acts.

- Reducing call center of volumes and improving customer services are all benefits of transforming to digital customer communications.

- Replacing complex, mainframe systems for archiving and e-presentment with modern, next generation digital systems significantly reduces both direct and indirect IT costs.

## Essentials

- Simplify electronic delivery of business-critical customer communications including statements letters, invoices and policy documents

- Gives your organization the data protection needed to comply with industry and government regulations

- Designed from the ground up for digital delivery of high-volume business content

- Reduces overall costs and increases customer satisfaction

- ePresentment Gateway for Box provides a migration path away from the expense and management burden of legacy archives

- ePresentment Gateway for Box brings the modern, extended, pure-digital Box feature set advantages to document communications from line-of-business and legacy applications

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## Solutions Overview

### Archiving Workflow

ePresentment Gateway for Box supports end-to-end archive workflows including file capture, document transformation, indexing and finally storage in Box. Archive workflows can distinguish between different types of jobs and route them for different processing. This means different rules for transform, indexing and storage can be used based on the job and document type.

### Format Support

Customer communications are produced in many different formats such as line data, AFP, Metacode, PostScript, PCL or PDF, which in many cases are ideal for printing but are not optimized for archiving and viewing. ePresentment Gateway for Box can store the original print content in compressed archive files when necessary for compliance purposes, and convert legacy print formats to PDF/A for both viewing and long-term archiving.

### Indexing & Data capture

Batches of customer communications can contain thousands of individual documents. Documents in the batches need to be identified and meta-data captured so that they can be retrieved in the future. ePresentment Gateway for Box supports a range of indexing techniques that include zonal, AFP TLEs, PDF page piece dictionaries and external files that provide a user-friendly method to search and locate specific customer communications documents.

### Fine Grained Records Management

ePresentment Gateway for Box stores individual documents (as opposed to large batches) which allows full control over records management. Increasingly regulations such as GDPR require fine-grained records management and ePresentment Gateway for Box's document storage strategies ensure that the appropriate policies can be applied while optimizing storage costs. Retaining statements, bills, invoices and correspondence helps achieve compliance with industry regulations in banking, insurance and healthcare and for tax compliance.

### Migrations from Legacy ECM

ePresentment Gateway for Box is an ideal target for migration of legacy customer communication archives to new platforms. In particular Crawford Technologies has migrated large text and AFP archives from many legacy systems to next generation ECM systems.

### Cloud Platform

ePresentment Gateway for Box is the first pure cloud solution for customer communication archiving and e-presentment. It's a secure service designed for organizations that want to take advantage of the scale, simplicity and power of cloud infrastructure for their archiving needs.

## Ask Yourself?

- Do you have a customer communications archive, report archive or COLD system or the need to retain customer communications?

- What ECM or archiving systems are being used?

- What types of documents do you archive?

- What formats are the documents generated in?

- How many documents do you generate and distribute each month?

- How many documents are in your archive or ECM system?

- Do you need to comply with Section 508 guidelines for accessible customer communications?

- What is the typical retention period of your reports?