

Transactional Mail - Bill Presentation



- Access Customer Profiles and Invoices
- Send Bill Notifications
- Allow Customers to:
 - View Bills
 - View Payment History
 - Pay Online*

*client provided

Our online document management system is designed to make it easy for you to search, use, print and perform related functions on customer documents – orders, invoices, statements, contracts, records.

Document Source

Original documents must be digitally created and formatted, with or without a template for imaging and printing, and available to be extracted for document management and viewing.

Viewing

The viewing system administrator establishes user rights to allow access to various levels of customer information and authorize transactions.

- Access document management brings in extracted documents.
- Extracted documents are formatted into single or multiple documents for easier viewing.
- Documents are categorized by type (e.g., correspondence, invoices) and can be sorted by category, date, customer ID, last name or terms that can be keyed in by the user.
- Authorized users are able to make notes relating to the documents and perform functions that are linked to approving orders, confirming dates and paying bills.
- Authorized viewers can search and view current and archived documents by data fields.

Display Methods

- Documents are presented in two formats:
- Display format that allows you to search for multiple documents.
- PDF format of the actual document presented to the customer that can be viewed or printed.

Delivery Methods

Our system links to online CRM services. We can re-send exact documents via:

Direct mail; e.g., invoice with return envelope

Email; e.g., electronic transaction (order, contract, payment)