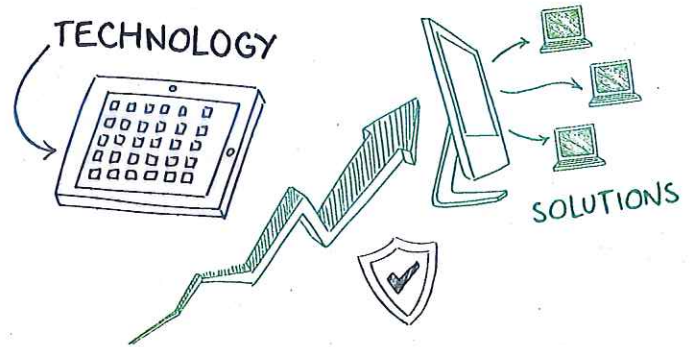# ePRESENTMENT

Simplifying Your Move to Online Self-Service

Expense management and competitive pressures to improve the online customer experience are moving organizations toward an online self-service model, where clients can retrieve and access documents, also known as e-presentment. But access preferences can be challenging to define. And integration can make the result anything but seamless. How do you provide customers with a smooth online experience and access to relevant and accurate information, delivered in the format they want? And will content be flexible and fast enough to satisfy customer expectations?

Robust ePresentment Capabilities

DST's ePresentment solutions support the search, retrieval, display, and storage of customer documents and forms. Our robust capabilities enhance customer experiences, reduce paper and postage costs, and empower your agents and customer service representatives with web presentment. In addition to the potential financial and environmental benefits, e-presentment can help you differentiate through an online self-service model. As a result, you can:

- Access and present information easily
- Store and retrieve information as needed
- Drive customers online

Electronic presentment may take many forms:
- Investor documents
- Confirms and transactions
- Tax forms
- Invoices and letters
- Foreign documents
- Multi-language display
- Reporting storage and display with restricted access available

ePresentment for Consumers can integrate seamlessly with your corporate website, providing a consolidated view of multiple accounts under one login.

- Fast, easy access to documents
- Often no additional client data prep for standard documents
- 24/7 customer self service
- Increased e-adoption
- Reduced cost, consumer archival

ePresentment for CSRs uses search functionality that's optimized to your data fields for quicker call resolution.

- Better service with first-call resolution
- Business continuity capabilities

ePresentment Capabilities

On-Demand Distribution:
Your customers often need copies of key documents for their records. DST's On-Demand Distribution provides a convenient, automated method for providing reprints of any archived document, whether print or digital. Delivery can be via email, fax, or printed documents.

Consent and Suppression:
With Consent and Suppression, users have the ability to consent to the e-delivery of their important documents, thereby suppressing paper copies. This consent to electronic presentment and delivery saves volumes in processing, materials, and postage over paper statements. When combined with other components, Consent and Suppression is an end-to-end, automated process that consists of four components including: consent, validation, reporting and revoke (if selected by customer).

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Batch Downloads:

Save advisor time with easy, multi-customer document viewing/retrieval.

- Vision Batch Download delivers documents to broker-dealers in a searchable PDF format
- Reduces the need to call customer service
- Flexible for on-request needs as well as subscription or timed deliveries
- Systematic service automatically completed each month and/or quarter

Extended Archival:

DST offers a low-cost, reliable solution to present current and historical customer documents, using outputs such as online storage, network, or digital. For added convenience, viewing options can be managed by audience, allowing for shareholders or customers to see documents up to a certain period of time, with a different criteria allowed for your back office. Extended archiving:

- Can be used to support compliance and certain regulatory needs depending on industry
- Reduces physical space requirements
- Helps improve customer service with easily located archived documents
- Allows you to determine retention periods for documents

The DST Advantage

DST Financial Services offers robust e-communications solutions that encompass the entire document creation and delivery process – receiving document data streams, online document presentment, email document delivery, consent and preference management, providing tools for customer service representatives and agents and providing comprehensive statistics and reports. DST has been distributing documents electronically for over 25 years.

DST Systems, Inc. is a leading provider of sophisticated information processing and servicing solutions to companies around the world. Through its global enterprise, DST delivers strategically unified transactions and business processing, data management, and customer communications solutions to the asset management, brokerage, retirement, and healthcare markets. Headquartered in Kansas City, MO., DST is a publicly traded company on the New York Stock Exchange.

Learn More

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