CLIENT LETTER™

Version 5.0

If you'd like to empower your customers to service their own requests, or if you have a team of employees or contractors who create personalized customer communications, then you need CLIENT LETTER®.

CLIENT LETTER is the industry-leading solution for creating and consuming interactive communications using tablets, smartphones and computers. It also automates the production of personalized, relevant, error-free communications—whether generated on-demand or in high-volume batch jobs—and can distribute them over multiple channels. And it provides a document creation history and audit trail for ensuring compliance, plus quality assurance and reporting tools.

Now with version 5.0, your business users will get an uncluttered, 100% browser-based application for creating interactive communications—right out of the box. Your technical users will have access to powerful data-mapping tools and web services that integrate your back-office systems with customer touch points for automating on-demand and high-volume batch communications. And your CIO will approve of how well CLIENT LETTER fits into your service-oriented enterprise architecture to leverage security protocols, content management and other IT-administered resources.

Industries Served

» **Health Care Payers and Providers**
» **Property and Casualty Insurers**
» **Financial Services Companies**

» **Utilities and Telecom Providers**
» **Federal, State and Local Governments**

Capabilities

Interactive
Maximum productivity – Quickly identify the right template from a library of those you have permission to see; respond to prompts for information to personalize the communication; optionally select any attachments or enclosures and then send it to be printed, faxed, emailed or messaged. The software can even be integrated with your web portal to provide your customers with an easy-to-use, self-service option to increase relevancy and decrease response times.
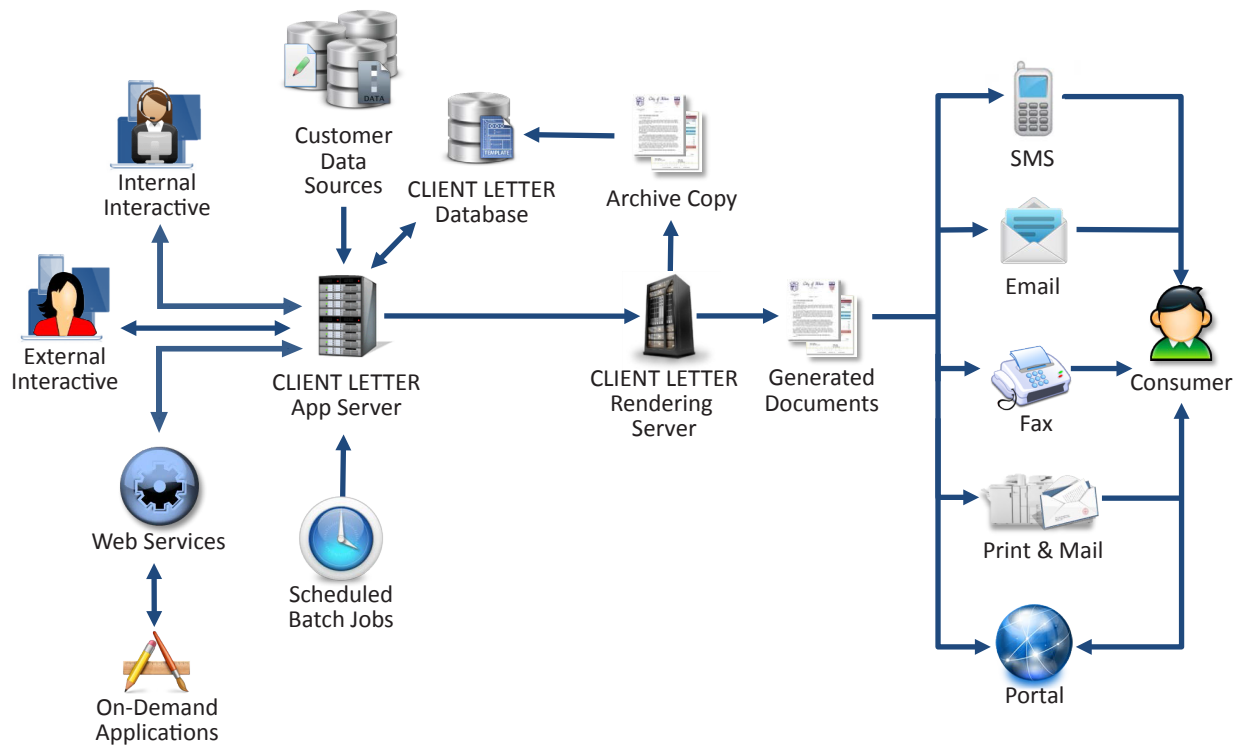
On-Demand
Ideal experience – Use our service-oriented architecture to create automated push or pull communications with little or no user interaction, whether initiated internally by your back-office or line-of-business software, or by a customer using almost any touch point, including internal and external web sites and mobile applications. Automating these communications virtually eliminates the possibility of human error, including data-entry mistakes.

High-Volume Batch
Maximum throughput – Render millions of pages per day, per server. Combine multiple servers and dramatically increase the number of pages that can be generated per day. Add our web services, and you can totally automate the production of most data-driven documents, with zero end-user involvement.

CLIENT LETTER™

Put your customers in control, and anything's possible.

Internal Interactive · External Interactive · Customer Data Sources · CLIENT LETTER Database · Archive Copy · CLIENT LETTER App Server · CLIENT LETTER Rendering Server · Generated Documents · Web Services · Scheduled Batch Jobs · On-Demand Applications · SMS · Email · Fax · Print & Mail · Portal · Consumer

CLIENT LETTER Workflow

Creating Communications

CLIENT LETTER creates interactive, on-demand and batch customer communications.

Interactive: Both internal users (such as a call center representative) and external users (such as a claims adjuster in the field) can use the browser-based CLIENT LETTER Interactive application on a computer or mobile device.

On-Demand: Applications, including IVR systems and web portals, directly integrate with CLIENT LETTER via web services. If required, users will be prompted for input. The input can be menu-driven, or free-text entry. If no user input is required, communications may be entirely automated.

Batch: Communications that do not require any user input can be entirely automated, scheduled and batched together.

Rendering Documents

Each template specifies the data elements to be pulled into a communication. The data can come from a variety of sources, including mainframe applications, content management systems and customer databases, as well as from the CLIENT LETTER database. CLIENT LETTER automatically retrieves and merges the data with the template before submitting a job to be rendered.

Multichannel Output

CLIENT LETTER supports a variety of file formats, including AFP, PDF and PostScript. Communications can be sent via SMS or email; faxed; printed locally on a workgroup printer or on high-volume production equipment for mailing; or posted to a customer web portal.

Features

» Simple, browser-based user interface for creating interactive communications

» User-specific roles and rights give each user just the right level of functionality

» Automated document creation uses data integration and web services

» Advanced production engine can output millions of pages per day

» History tracks every user, template and document at every step

» Once installed, business users can manage the entire solution

Benefits

» Improve the quality and consistency of your communications and your customer experience by increasing customer satisfaction

» Improve collaboration between lines of business and across departments by selectively providing users with the ability to contribute, edit and publish content

» Reduce risk, cost and time to market through automation

» Easily handle today's peak volumes with the ability to scale up as workload increases

» Monitor compliance and maximize productivity using audit trails and reports

» Minimize IT requests (and chargebacks) while maximizing IT-administered resources, including users and groups, databases and output devices

Specifications Overview

Modern: Runs on widely-supported server operating systems and web application servers. Uses XML-based templates, which simplifies creating and deploying communications for multiple channels.

Usable: Provides a browser-based interface for creating interactive communications out of the box. Eliminates the need for custom development and dramatically reduces the cost, time and aggravation associated with initial implementation.

Business-Friendly: Enables business users to design and edit templates, and manage most other functionality, such as quickly making changes and easily adapting to new regulations, staffing changes or shifting market conditions.

Efficient: Incorporates business logic and common objects to minimize the number of templates and speed up editing templates.

Compatible: Uses web services to integrate with business process and content management systems, back-office and line-of-business applications and customer touch points. Allows your organization to consolidate the creation and management of all interactive communications (e.g., correspondence) onto one platform.

Insightful: Manages jobs using easy-to-use tools, or integrates with your current production tools. Use our reporting tools, or point your existing business intelligence tools at our data.

Flexible: Complements structured solutions, including our own INFORM™ application, or solutions from third-party DOCCM vendors.

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Training and Support

Our applications and APIs come with world-class documentation, including implementation, user and technical guides. Initial training for administrators and end users is conducted when implementing the application. Advanced or refresher training is available on-site or via web conferencing.

Business and technical users have 24/7/365 access to our support team. Most customers use our self-service support portal, but all users can call or email our dedicated support team at any time. Even when contacting us after hours, our customers always receive a response the same day, and typically hear back from us within an hour or two.

For More Information

To learn more about CLIENT LETTER 5.0, visit: **topdownsystems.com.**
To discuss specific requirements or schedule a private demo, call: **1-800-361-1211.**

Key Technologies
Technology summary of Service-Oriented Architecture (SOA):
- » C++
- » Enterprise JavaBeans (EJB)
- » Java 2.0 Enterprise Edition (J2EE)
- » JavaServer Pages (JSP)
- » JDBC
- » Web Services (SOAP)
- » XHTML
- » XSL-FO
- » CSS
- » HTML
- » Java
- » JavaScript
- » ODBC
- » TCP/IP
- » XML

Supported Platforms
The new platform-independent architecture has been released first for Microsoft® Windows Server®; other operating systems will be supported as requested. The Interactive component is a Java 1.6 web application; it has been tested on Apache™ Tomcat™ v7.0 and IBM® WebSphere™ v7.0.

All components can be run on physical or virtual servers. The architecture will integrate with applications hosted on any platform that supports Web Services (SOAP).

We're Topdown.
For more than 30 years, we've been filling the document automation and correspondence needs of our customers. No matter how complex. But today we realize it's about more. It's about giving you what you want. Not just our customers, but your customers, too. Communication on their terms—putting the what, when, where and how at their command. We call it *Consumer-Driven Communications*, and it's where the world is going. We know, because we can see it. And we've got the experience to take you there.