



## Streamline Account Holder Communications with XDI

The XDI connector gives institutions the ability to outsource printing and mailing to Xpress Data, Inc. (XDI). Letters created in the Temenos Collection and Recovery modules can be exported to XDI for delivery via First-Class or Certified Mail, saving your institution time and money!

### Key Features

#### Complete Automation

With the XDI connector, letters generated during the Send Letter workflow are automatically flagged to be sent to XDI based on user-defined criteria. XDI receives a delimited data file, used to compose the letters, each morning through a daily import.

#### Access to all Documents

Quickly access all XDI documents and delivery information within the *person workspace* for easy letter tracking. The XDI Document Index Screen provides a complete list of documents for the current account that are generated through the system and stored by Xpress Data.

#### Quick Delivery

Letters received by 11 AM Pacific Time are typically printed and mailed the same day via First-Class or Certified Mail; or uploaded for electronic presentment.

### How It Works

While working accounts, run a "Send Letter" workflow and choose the type of letter you wish to create. The data is then sent to XDI to be produced and delivered.

Once complete, the Letter History Screen notates all letters outsourced to XDI and provides PDF documents to all submitted outsourced letters. Document delivery tracking for both First-Class or Certified Mail is included, as well as email invitation and document view tracking for electronically delivered documents.

The screenshot shows the 'Step: Send Letter' workflow interface. It includes a 'Workflow' menu, 'Step: Send Letter', and 'Send Letter - Manual' options. The main area is divided into 'Available Letters' and 'Selected Letters'. The 'Available Letters' list includes: 45 Day DG CC, Account Case Letter, Current Date, DG Letter, Learn to Test Letter, Old Fields Test, Please Contact Us, and Standard letter. The 'Selected Letters' list contains 'Delinquency Letter'. Below these are 'Workflow Comments' and a 'Go To Next Step' button.

Below the workflow interface is a screenshot of a 'Delinquent Account Notice' document from Atlantic Coast. The document header includes 'Atlantic Coast', '241 E. Main St., Charleston, SC 29423', and 'Delinquent Account Notice'. The document body contains a notice regarding a delinquency of \$500.00 and a request for payment by December 31, 2013. It also includes contact information for Lindsey Bell, Special Accounts Department.

Date	Name	ID	First-Class Mail	Certified Mail	Delivery Channel
05/23/2013	Friendly Reminder of Past Due Loan	CJP123	N/A	N/A	
05/23/2013	Friendly Reminder of Past Due Loan	CJP123	Out for Delivery	N/A	05/23/2013 4:12 AM

## Benefits

### Save Time

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Let Xpress Data do the work for you! Rather than spending time printing and mailing letters and notices, focus on the other key functions of your business.

### Save Money

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Xpress Data offers reduced postage rates and lowers the number of pieces sent by combining multiple letters that are addressed to the same person into one envelope.

### Increase Letter Quality

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Xpress Data uses enhanced formats and laser printing to increase the quality and effectiveness of letters and notices.

## More Information

### System Requirements

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Version 9.02 or higher must be installed. Some new features may also require that version 10.31.10 or higher be installed.

### Provider Highlight

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XDI is focused exclusively on composing, producing and delivering credit union member correspondence including Temenos collection letters.

These customized documents can be printed and mailed via First-Class or Certified Mail or delivered electronically. Either way, credit union clients enjoy substantial savings in production and postage costs while significantly improving the quality and effectiveness of their member communications.

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*For more information about the XDI, check out [www.xdi.com](http://www.xdi.com) or contact your Temenos Account Manager. To reach Xpress Data directly, please email [sales@xdi.com](mailto:sales@xdi.com) or call 858.676.9888.*

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