

Executive Overview

Traditional business practices based on document creation, delivery and distribution are too costly for organizations to continue to communicate to Clients/Members on a regular basis. The increased costs of paper communications including, postage, labor and supplies are making organizations re-think how and when they communicate to Clients and Members.

The **Statement2web** Platform allows organizations to take hold of personalized communications that have the familiarity of a traditional statement rendering process. Your Clients/Members can access statements on-line while still receiving electronic inserts, news columns, promotions and even personalized letters. With **Statement2web**, messages can be personalized in a matter of minutes versus days or weeks. **Statement2web** easily integrates into your existing print process so minimal changes are required, allowing your Clients/Members to begin taking advantage of their electronic mediums immediately.

Today's responsible organizations are looking toward green initiatives to reduce the costs incurred by paper based processes, while continuing to improve personalized communications to their constituent base. The **Statement2web** Communication Platform provides an easy path that removes the paper and inserts improved Client/Member relations.

Highlights

- **Portal Content Management** - No Programmers needed, easy to change and add logo's, banners, colors, messages, promotional links and video clips in minutes
- **Administrator View** - See it all, have access to enrollment information, campaign success, know when changes have been made to marketing messages or the web site. Access valuable, dynamic reporting information to improve message content or to better manage your paperless communications
- **Single - Sign On - On-line Banking** or Client Portal already in place? No problem! Statement2web has standard interfaces to numerous platforms including Harland Clarke- Ultradata, Jack Henry- Symitar, Intuit-Digital Insight and much more...
- **Message & Alert Frequency** - Determine when, how often, and with what information you wish to notify, present or offer new messages to your Client/Member base. You are no longer bound by the archaic processes of system program change requests and two week resolution times.
You are Free to communicate at will...

Features & Benefits

Features

- **Easy Site Customization** - Get recognized with our easy site customizing options. Fashion your eStatement site to seamlessly blend into your Financial Institution's original web site, or give your eStatements a different feel exclusively directed to your eStatement users. It's all up to you!
- **Craft Your System's Automatic Notifications** - Now you can edit and personalize all instant system notifications reaching out to you and your eStatement users. These messages can reflect your financial institution's contact information, special notes to your users, and more. Control notifications sent to your eStatement user with our personal deactivate and re-activating options.
- **Tailor Monthly Statements** - Change monthly eStatement banners to provide your eStatement users with the latest up-to-date information regarding your Financial Institution.
- **Launch e-Campaigns** - Send marketing campaigns to your eStatement users based on their individual interests.
- **Create Personalized Promotions** - Your statements have gone online but you don't have to leave your inserts behind. Create Links, eInserts, ePromotions, eNews Columns, and personalized eLetters to keep your eStatement users well informed.

Benefits

- **Reduce Payout.** No need to code site changes means more money saved by you. Put away the stress of marketing research and consumer surveys too. All you need is the click of a button and you have instant information, with endless possibilities.
- **Work Faster!** There is no need to wait for your changes and updates to be made, just login and go to work. Our **Statement2Web** site customizations provide your financial institution with simple, easily accessible, and quick solutions.
- **Strategize Intelligently.** Our eCampaigns help your financial institution give eStatement users exactly what they are looking for, literally! Your site automatically locates link preferences made by your eStatement users, helps you craft and send personalized email campaigns based on their preferences, and you never even had to pick up a telephone.
- **Use What You Have.** No matter what, you are going to spend money on marketing materials in your printed statements. Add existing promotional material to your eStatement user's statement window at almost no extra cost; or create new promotional material using media and flash files. It's all in your hands.
- **Provide Security.** With a highly secure server system and personal site reports your system stays well protected, and so do your eStatement users.

Screen shot example

The screenshot displays the Statement2web platform interface within a Windows Internet Explorer browser window. The main content area features a video player with the text "Just Some of the Great Things about Being a Credit Union Member:" and a video of two men. A sidebar on the left contains navigation links such as Home, Profile, Power Users, eStatements, Reports, Portal CMS, Notifications, Links, eCampaign, eNewsColumn, ePromotions, eInserts, eLetters, Support, and Reset Password. A top navigation bar includes "Statement2Web" and "User Guide".

Overlaid on the interface are several windows and panels:

- Change or Set Banner for January 2009**: A dialog box with "Banner width should be 720px and should be in .jpg format" and buttons for "Browse" and "Upload And Activate".
- Upload a New Banner Image**: A panel with a "Browse" button and "Upload And Activate" button.
- Account Summary**: A table showing account details for "JAMES BEE" with fields for Member Number, Account Type, Page Number, Total Balance, Total Credits, and Total Debits.
- Transaction History**: A table with columns for Date, Type, Transaction Description, and Amount. It lists transactions for "Regular" and "Savings" accounts.
- What's New with Your Statement2Web Credit Union**: A news section featuring a photo of a man and text introducing a new company Vice-President, Jameson Brannaman.
- Add New Resource Link**: A dialog box for adding a new link with fields for Status, Link Name, and a radio button for "Link a file (Less than 5 MB)".
- Portal CMS**: A vertical menu with options: Set Logo, Theme Settings, Site Settings, Manage Links, Add New Page, Edit Page, Authorize Page, and Assign Page.
- Block Settings**: A table listing various blocks and their status.
- WYSIWYG Editor**: A rich text editor at the bottom showing a form with fields for Name, Address, City, State, Zipcode, and a salutation "Dear (Name),".