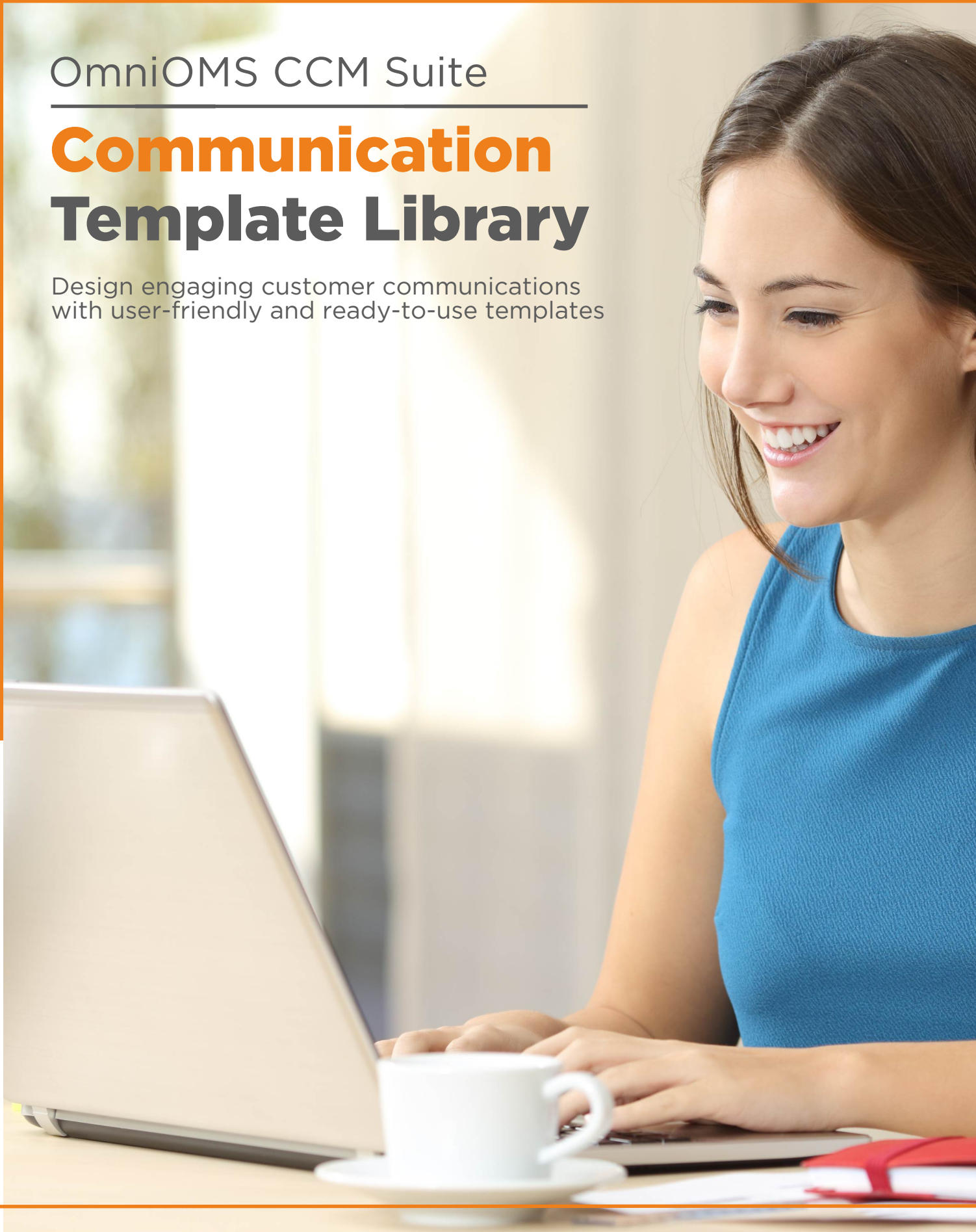


OmniOMS CCM Suite

Communication **Template Library**

Design engaging customer communications
with user-friendly and ready-to-use templates



Overview

Digital customers expect you to communicate with them in their context and through their preferred channel. While you focus on redefining your customer experience, you struggle with creating communications that are personalized, effective, compliant and as per your branding guidelines.

With our wide range of user-friendly and ready-to-use templates, you can now easily design engaging, accurate, and personal communications to meet the needs of your customers. The Communication Template Library is a part of Newgen OmniOMS Customer Communication Management (CCM) Suite. It offers templates to enable you to generate correspondences such as notices, contracts, demand letters, statements, mailers, and others. This booklet showcases a few sample templates to help you design and deliver high-volume, one-to-one and on-demand communications across Banking and Insurance verticals.

Templates for all Communication Types



High-Volume Communications Structured, high-volume or bulk communications that can be scheduled, and generated in a hassle-free way

- Phone/ Utility Bills
- Financial Statements, such as account statements, credit card statements and others



One-to-One Communications Communications that require human touch for completion by providing variable data in a structured template:

- Negotiated Documents, such as insurance policies or derivatives
- Welcome Kits
- Appeals & Grievances



On-Demand Communications Real-time communications, initiated by customers or service agents:

- Online Policy or Statement Generation
- Order & Transaction Confirmations
- Instant issuance of ID cards, Benefit Statements and others



Banking

- Account Statements
- Consolidated Statements
- Retail Individual Statements
- Credit Card Statements
- Brokerage Statements
- Welcome Kits
- Letter of Credit
- Stop Payment Advice



Insurance

- On-Demand Policy Generation
- Critical Illness Policy
- Goods Carrying Vehicle Policy
- Passenger Carrying Vehicle Certificate
- Personalized Correspondence
- Group Insurance Policy



Telecom

- Bill Presentment
- Duplicate Bill Generation
- Marketing Campaigns
- Welcome Kits
- Web Presentment



Utilities

- Monthly Bill Presentment
- Marketing Campaigns
- Duplicate Bill Generation



Healthcare

- Personalized Letters
- Approval/Denial Letters
- Member Letters
- Provider Letters
- Monthly Claim Reports
- Certificate Of Health

Sample Banking Templates

- Responsive HTML Communications
 - Account Statement
 - Promotional Emailer
- Welcome Letter
- Credit Card Statement
- Annual Interest Certificate
- Demand Notice





ACCESS NETBANKING

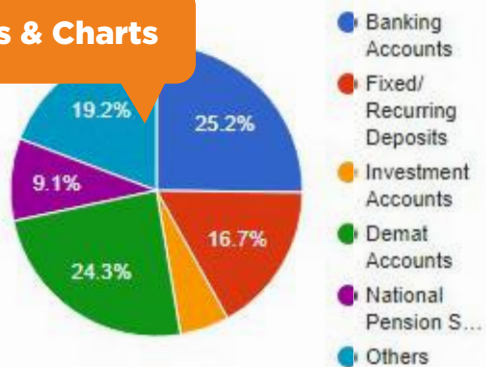
Account Overview

closing as on 31-12-2018 10:30hrs IST | Currency: INR

Banking Accounts Rs.12,789.00	FD/RDs Rs.56,389.00	Investment Accounts Rs.25,741.00
Demat Accounts Rs.52,147.00	NPS Rs.987.00	Others Rs.23.00

Overview amounts split

Account wise amount split



Rich Media Content

Enable Customers to generate On - Demand Statements



Multiple Tabs

Menu

ACCOUNTS OVERVIEW

MY ACCOUNTS

1. SALARY ACCOUNT (XX22HJXXD)
2. JOINT ACCOUNT (XX22HJXZD)
3. CREDIT CARD ACCOUNT (*FDGF)

MY OFFERS & DEALS

CONTACT US

Offers

Upto 3x
Reward
Points on
every
purchase.

**Apply
Now**

Learn More

1. Salary Account (ending :321)

Type: Savings

Closing balance: Rs.90,000

Account Holder: Manpreet Singh

Nominee: Mr.Rahul Sharma

Statement of Transactions for the period June 01, 2018 - June 30, 2018

Show

10

entries

Search:

Search, Sort & Filter

Date	Transaction Details	Amount
01-09-2018 02:00:00	Cheque/00132	8745.00
01-09-2018 10:00:00	Card Payment / 3342 / AAC	46991.00
03-09-2018 22:24:43	Vpay-22301/ED/SM	-61040.00
10-09-2018 23:40:00	Interest Received	-7071.00
13-09-2018 03:00:00	Interest Received	93458.00
14-09-2018 00:04:00	Purchase	18607.00
16-09-2018 03:32:00	PayTM	-87536.00
17-09-2018 20:00:00	Interest Received	3451.00
24-09-2018 04:00:00	DematCharges	954.00
26-09-2018 10:00:00	OnlineSubscription	1110.00

Showing 1 to 10 of 14 entries

Previous

1

2

Next

Copyright 2019. All rights reserved



Earn a wealth of **Reward Points** and **CashBack** on all your card spends.

Dear Vikram

There's nothing more satisfying than shopping at the mall with your loved ones. Now to enhance your experience, enjoy bonus privileges, every time you swipe your Bank Credit Card to spend.



Have a look at how you can get more value from your card

Use your card	You get
10 points	30 points

Also have a look at the exciting offer we have for you



Enjoy 3% **CashBack*** on all utility bill payments.
Click here to avail the offer.

Warm regards,

Rohit Nangia
Business Head
Card Payment Products & Merchant Acquiring Services



Create a Lasting Impression with Effective Welcome Letters

New Age Bank Ltd.

8270 Woodland Center Boulevard
Tampa, Florida – 33614
United States of America
Website: www.newagebankltd.com



Mr. Robert Thomas

B-23/4, Christina Rd.
NH-110007
Florida, USA

Account No.: - 0002407000100

Date: 11-09-2018

Subject: - Regarding Opening Of New Savings Account Facilities

Dear Mr. Robert Thomas

It is our sincere pleasure to welcome you to New Age Bank Limited and hope that you will find great value in the relationships that the team of New Age Bank will provide. We are committed to providing exceptional client service by continually working to improve our community and the banking experience of our clients.

We will provide you the ATM-cum-Debit Card and ATM PIN. The card will enable you to use ATMs in the country and the international card enables you to make transactions both in the country and abroad.

We will provide you with the User-id and password to login to Internet Banking facility to view and manage your account online. You may also setup your transaction password through Internet Banking facility afterwards.

We will also provide you with the 20 leaves Cheque book that will be issued by the home branch in due course.

Your Credit Card Welcome Kit will be delivered within 7-10 working days, from the date your Credit Card is approved. You will receive a notification regarding the same post approval process.

You may access your account through Telephone and for that you require a six digit TPIN, which you can create by calling our customer care service.

For more detailed information about any of our products or services, please refer to our website, www.newbankltd.com, or visit any of our convenient branch locations. You may also contact us through phone at 1-800-8771-4213.

Sincerely,

A stylized, handwritten signature in black ink, appearing to read 'Signature'.

Relationship Manager,
New Bank Limited

Customer Services
Call: 1-800-4345-4545, Email: contact@newbankltd.com

Design and Deliver Engaging Welcome Letters

West East Bank

8270 Woodland Center Boulevard
Tampa, Florida – 33614
United States of America
Website: www.westeastbank.com



Date : 11-09-2018
Agreement No.: 133122



To,

BORROWER
Robert Smith
1364 Beverly Road, Suite 300
New York

CO-BORROWER
William Donald
324 Wilson Point, 234
New York

GUARANTOR
Chris Thompson
324 Wilson Point, 234
New York

Dear Sir/Madam,

We thank you for choosing us as your preferred financial partner. We welcome you to the family. We are happy to reiterate our commitment to fairness & transparency:

1. All charges are clearly communicated to every customer in a written format.
2. No charge or installment will be collected by Bank personnel, without providing a corresponding transaction receipt.
3. Vehicle Insurance: You have indicated that you will obtain comprehensive insurance for the financed vehicle through the loan tenure. On annual renewal of this comprehensive policy, you will need to submit a policy copy to the branch before the expiry date. If this copy is not submitted to the branch, Bank will charge \$ 200 per month till the time you submit the renewed comprehensive insurance policy.
4. Your mobile number is very important for receiving timely intimation from our bank in respect of dues, receipt of collections, settlement of contracts etc. It is suggested that you retain the same number or in the event of change in the number kindly keep us updated in order to ensure that you continue to receive timely intimation from our bank in future as well.
5. If you so desire, we would be happy to assist you for your insurance needs relating to the hypothecated vehicle at a competitive insurance premium beneficial to you through a renowned insurance company and you may also avail insurance finance from us for renewing the insurance policy of the vehicle, you may approach our branch for all the details.

In case of any queries, you may get in touch with through our branch office or our central Customer Care Unit. We guarantee resolution of your queries. To help us resolve your issue, request you to please quote your Agreement Number in your communication with us.

Customer Care Unit,
USA Bank
8270 Woodland Center Boulevard, Tampa, Florida – 33614
United States of America
Toll Free No. : 1900-223-1343

Please find enclosed the terms & conditions of your loan.

Thanking You,

West East Bank
(Please note this is a computer generated letter and hence requires no signature)

- In case of any clarification, you may contact our branch or Toll Free Number



West East Bank
8270, Woodland Center Boulevard, Tampa, Florida – 33614, USA

Design Targeted Communications

North South Bank

8270 Woodland Center Boulevard
Tampa, Florida – 33614
United States of America
Website: www.northsouthbank.com



North South Bank

Credit Card Statement as of 11-09-2018

Robert Smith
1364 Beverly Road, Suite 300
NYC - 10257
robertsmith64@email.com
+65 6732-9911

Card Number

1000000005678

Available Credit

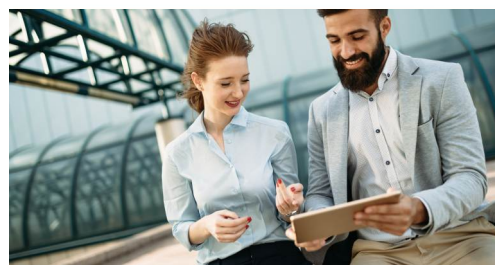
6,000.00

Dear Cardholder,

To get regular updates and information on our latest offers, please ensure your mobile number and email id is updated.

Credit Card Overview

Statement Date	Credit Limit	Available Cash Limit
11-09-2018	10,000.00	5,000.00
Payment Due Date	Minimum Due	Total Due Amount
30/09/2017	4,000.00	4,000.00



Credit Card Summary

Previous Balance	Advances	Financing Charges	Payments Received	Closing Balance
2,532.00	450.00	50.00	500.00	4,000.00

Transaction Details

Transaction Date	Transaction Details	Transaction Amount	Debit(Dr.)/Credit(Cr.)
09/20/2017	Cash Advance	1,000.00	Cr
09/20/2017	Flexipay to IBIBO Group	4,890.00	Cr
09/22/2017	Amazon Pay Bangalore	2,379.00	Cr
09/23/2017	Payment to Zaak Enterprise	4,999.00	Cr
09/24/2017	Cash Advance	4,000.00	Cr
09/25/2017	Payment to County Airline	32,500.00	Cr
09/26/2017	Payment to Del Store	300.00	Cr
09/27/2017	Credit Card Payment	25,000.00	Cr
08/01/2017	POS Merchant #12	5,000.00	Cr
08/04/2017	Payment to ABC Utility	3,990.00	Cr



North South Bank
8270, Woodland Center Boulevard, Tampa, Florida – 33614, USA

Nation Bank

8270 Woodland Center Boulevard
Tampa, Florida – 33614
United States of America
Website: www.usabank.com



Annual Interest Certificate

Date : 11-08-2018



TO WHOMSOEVER IT MAY CONCERN

Annual Statement for claiming deduction Under Section 24(B) & 80C of the INCOME TAX ACT, 1961, for the period Oct 2018 to Oct 2019.

This is to state that Mr Robert (HOME LOAN ACCOUNT NO. 323233 and CUSTOMER ID 3232324) has been granted HOUSING LOAN of \$ 32244 @ 16% per annum in respect of the following property.

Property Details :

Robert Smith
1364 Beverly Road, Suite 300
New York

The above loan is repayable in Equated Monthly Installment (EMIs) comprising of Principal and Interest. The total amount of EMI / PEMIs payable from 12-01-2019 to 28-06-2019 is \$8767

The break up of this amount is given below:

Principal Component (\$)	\$24000
Interest Component (\$)	\$3500
Principal Outstanding as on Sept 10, 2018 (\$)	\$18390
Pre-EMI Amount (\$)	\$17986
Subsidy Amount (\$)	\$968

NOTE :

1. Interest and Principal figures are subject to change in case of prepayment and/or change in repayment schedule.
2. Interest payable/paid on the loan (including Pre - EMI Interest, if any) is allowed as a deduction under section 24(b).

Thank You

Nation Bank
(Please note this is a computer generated letter and hence requires no signature)



Nation Bank
8270, Woodland Center Boulevard, Tampa, Florida – 33614, USA
T: < No. > | F: < No > | <email> | www.usabank.com

Notify Customers in case of Overdues

West East Bank

8270 Woodland Center Boulevard
Tampa, Florida – 33614
United States of America
Website: www.westeastbank.com



Date : 11-09-2018

To,

Mr. Robert Thomas
B-23/4, Christina Rd.
NH-110007
Florida, USA



Dear Sir

Sub : Demand notice for the payment of overdues.

Ref : Loan Contract No.: 23251 dated 21-05-2018, Vehicle bearing Registration Number MI 0897

Please refer to our follow up, request for remittance of the overdue amount under your above loan contract. We have found from our records that you are still due in a sum of \$4422.53, towards overdue amount under the above loan contract.

You are hereby called upon to remit the above sum within seven days from the date of receipt of this notice to avoid further/any action from us as per law and in terms of the agreement.

Thanking You,

West East Bank

(Please note this is a computer generated letter and hence requires no signature)

CC to :

Co-Borrower : Mr. William Cook

Guaranter : Mr. George Seth

The liability of both of you is joint, several and co-extensive with that of the above borrower. Please remit the above amount within the above stipulated time to avoid further action from us as per law and in terms of the agreement.

- In case of any clarification, you may contact our branch or Toll Free Number 2422340001



West East Bank
8270, Woodland Center Boulevard, Tampa, Florida – 33614, USA
T: +1-900-3434 | F: +1-893-4373 | www.westeastbank.com

Sample Insurance Templates

- Acknowledgement Letter
- Personalized Correspondence
- Policy Notification
- Motor Policy Schedule
- Premium Certificate



Deliver Accurate and Timely Communications

Lifecare Insurance Ltd.

8270 Woodland Center Boulevard
Tampa, Florida – 33614
United States of America
Website: www.lifecareinsurance.com



Collecting Branch : Mount Stens
E-mail : stmains@email.com
Phone : +84-8435733
Servicing Branch : Mount Stens
Transaction No. : G535354463
Date (Time) : 11-09-2018



ADDITIONAL PREMIUM ACKNOWLEDGEMENT

Received an amount of \$60 through Payment Gateway over the Internet from Mr. Robert Pent Williams

Towards The Following :

Policy No	D.O.C.	Inst. Prem(\$)	No. of Inst	Total Premium	Next Due
P934783	09-09-2018	\$4343	45	\$45434	09-10-2018
P934784	09-09-2018	\$5353	32	\$54435	19-10-2018

Fund Type

Discounts

Late Fee Waiver

Type A1

5%

\$ 00.0

Type S5

13%

\$ 15.0

UNITS ALLOCATED WILL BE INTIMATED SEPARTELY IN THE POLICY . THE INVESTMENT RISK IN INVESTMENT PORTFOLIO IS BORNE BY THE P/HOLDER

Payment Acknowledgement generated
through Online Portal on 09-09-2018

This receipt is electronically generated.

Customer Services
Call: +1-800-334-334, Email: support@lifecareinsurance.com

Design Communications Using Existing Templates

Total Health Insurance

8270 Woodland Center Boulevard
Tampa, Florida – 33614
United States of America
Website: www.totalhealth.com



ENDORSEMENT PREMIUM

Policy Number : 6765363344

Policy End Date : 11-09-2019

Endorsement Effective Date : 11-09-2019

Endorsement Request Date : 12-09-2018

Name of Insured : Robert Kooch

Address of the Insured : F-126, Main Street, NYC

Reason for Endorsement : Personal

Current Policy Risk details:

Sno	Occupation	Designation	Salary per Month	Employee Count	Declared Wages	Classification Number	Endorsement Number	Risk Location ID
344	NA	Executive	\$34256	1	\$34553	133534	24244	NDA1335

Medical Expense Extension :

Option	Per Person Limit (\$)	Annual Aggregate Limit (\$)
344	\$23425	\$35323

Policy Risk Details after Proposed Endorsement :

Sno	Occupation	Designation	Salary per month	Employee Count	Declared Wages	Classification Number	Endorsement Number	Risk Location ID
3578	-	EXECUTIVE	\$35423	3	\$453464	34534346	34534534	GD245

Endorsement Premium:

Net Premium (\$)	GST (\$)	Surcharge (\$)	Total Premium (\$)
\$43554	\$3443	\$76876	\$56744

Total Health Insurance

Authorised Signatory



Total Health Insurance
8270, Woodland Center Boulevard, Tampa, Florida – 33614, USA
www.totalhealth.com

Engage Customers with Timely Communications

Worthwhile Insurance Ltd.

8270 Woodland Center Boulevard
Tampa, Florida – 33614
United States of America
Website: www.worthwhileinsurance.com



Wotrthwhile Insurance Ltd.

Dear Robert,

Thank you for choosing Worthwhile as your preferred insurance partner. Please find below Loan Status for Loan No. SD-2292482

Existing Loan Status

Policy No	34234
Servicing Branch	FT Road
Name	Robert James
Date of Loan	07-07-2018
Loan Outstanding (')	34433
Loan Repaid (')	23432
Broken Period Loan Interest Due (')	3432
Broken Period Loan Interest Due Date	29-11-2021

For any queries, please reach out to us at customer.care@worthwhileinsurance.com or call at 1800-103-2045



Worthwhile Insurance Limited
8270, Woodland Center Boulevard, Tampa, Florida – 33614, USA

Design Effective and Accurate Communications

ABC True Insurance Ltd.

8270 Woodland Center Boulevard
Tampa, Florida – 33614
United States of America
Website: www.abctrueinsurance.com



ABC True Insurance Ltd.

MOTOR POLICY SCHEDULE

Policy Holder Details

Policy Number: 34534

Name :

Will Seth

Address:

NA

Mobile No:

+6453564

Contact No. Res.:

3223523

Email-ID :

NA

Proposal/Covernote No: 45463

Policy Servicing Branch :

Cupertine

Transaction ID:

3245224T232F4

GSTIN/UIN of Policyholder:

54344HZ24

Gender :

Male

Tax Invoice No. & Date:

11-08-2018

Insured Vehicle Details

Registration No.	SH4545	Mfg. Month and Year	Aug 2018
Make / Model	VD	CC/HP	CC345
Engine No./Chassis No.	4534545	GVW	43553
Type of Body / LCC	Small	Total Premium (\$)	34553
RTO Location	MDF Crossing	Total IDV (\$)	433
Vehicle subtype	MUV	Hypothecation/Lease	Lease 4

Premium Summary

Own Damage - Section I	Amount (\$)	Liability - Section II	Amount (\$)
Basic OD	4533	Basic Liability (TPPD 1)	5646
TOTAL OWN DAMAGE PREMIUM	3565	Total Basic Liability Premium	3464
		PA Benefits - Section III	4634
		PA Cover to paid driver, Cleaners & Conductors	
		Total PA Premium	4543
		Legal Liability to paid driver and/or Conductor and/or cleaner	4543
		TOTAL LIABILITY PREMIUM	456
		TOTAL PACKAGE PREMIUM (Sec I + II + III)	16787
Total Premium Payable		\$24564	

Notify Customers with Effective Communications

Lifeline Insurance Ltd.

8270 Woodland Center Boulevard
Tampa, Florida – 33614
United States of America
Website: www.lifelineinsurance.com



Lifeline Insurance Ltd.

PREMIUM CERTIFICATE

DATE OF ISSUE : 2017-06-01

Premium Certificate for the purpose of deduction under Section 80D of Income Tax Act, 1961.

This is to certify that Lifeline General Insurance Company Limited has received an amount of \$ 520.0 from Mr. Robert towards payment of health insurance premium as per the details mentioned above. The premium paid for this policy is eligible for applicable tax benefits under section 80D of the Income Tax Act, 1961 and amendments thereof.

Note :Any amount paid in cash towards the premium would not qualify for tax benefits as mentioned above.

Name of the Policyholder	: Robert
Correspondence Address	: 1364 Beverly Road, Suite 300
Policy Number	: Policy-HGM-1
Issue Date	: 2017-06-01
Place	: New York

For Lifeline General Insurance Co. Ltd.
Authorised Signatory



Lifeline Insurance Limited
8270, Woodland Center Boulevard, Tampa, Florida – 33614, USA
www.lifelineinsurance.com

Newgen CCM Suite

Communication Template Library

Design engaging communications with a wide array of simple, ready-to-use templates. Leveraging these templates, you can create, update and manage communications in batches and generate interactive and on-demand communications. You can roll-out personalized communications across multiple engagement channels by selecting the right font, adding images and message lines, enabling secured e-signatures, and embedding targeted marketing campaigns.

Key Features

- Import existing PDFs and translate word documents into designer templates
- Create a master template and re-use it across all repositories
- Import/ export designer templates for re-usability across users and environments
- Check-in and check-out with base lining feature for version control
- Read/ write templates as per defined roles and privileges and use maker-checker capability
- Maintain a central repository of templates to sieve through a wide range of templates for perusal and usage
- Process templates in different languages such as English, Spanish, Portuguese, and others

Key Benefits

- **Ensure Consistent Branding**
Choose templates from our extensive template library or create new template designs to ensure design consistency
- **Use Multiple Templates**
Design communications using templates for welcome letters, e-statements, consolidated e-statements, payment acknowledgements, promotional letters, and others
- **Delight Customers**
Deliver communications in customers' preferred language be it English, Spanish, Portuguese or any other



About Newgen

Newgen is the leading provider of a unified digital transformation platform with native process automation, content services, and communication management capabilities. Globally, successful enterprises rely on Newgen's industry-recognized low code application platform to develop and deploy complex, content-driven, and customer-engaging business applications on the cloud. From onboarding to service requests, lending to underwriting, and for many more use cases across industries. Newgen unlocks simple with speed and agility.

FOR SALES QUERY

AMERICAS: +1 (202) 800 7783

CANADA: +1-202-800-7783

AUSTRALIA: +61 290 537 174

INDIA: +91 11 40773769

APAC: +65 3157 6189

MEA: +973-1-619-8002, +971 44541365

EUROPE: +44 (0) 2036 514805

info@newgensoft.com
www.newgensoft.com

