Secure Message Center Solutions for Financial Services Portals and Apps

Most financial services companies have a secure web portal for their account holders, members or clients, but often use traditional email encryption or expensive file sharing services with separate web portal logins for sending and receiving secure messages and files. That can be awkward and inconvenient, and not optimal for great customer service. Leading financial services companies know that seamless customer service is critical to keeping clients happy. An integrated secure message center and file exchange inside your portal is needed for more seamless communications, and happier clients and advisors.

Solution: Secure Message Center

A secure message center adds web-mail, web-form or web-chat services natively to financial services customer portals and mobile apps so that clients can easily ask questions about their account and share supporting files or images (receipts for a credit charge dispute, a tax return as part of a loan application process). Client messages and files are routed to responsible employees - account teams, support personnel, or contact center agents for a response. Case numbers may be assigned for tracking in ticketing systems, and response notifications are sent via email or SMS text channels to notify customers of a waiting reply. For security and regulatory compliance reasons, the message content are encrypted for security in motion and at rest, and detailed logging and tracking reports provide transaction history and proof for compliance audits.

Solution Highlights

- Secure message and file exchange for customer portals and mobile apps

- SSO eliminates extra passwords and frustration

- Messages and files encrypted, logged, and tracked

Features	Benefits
Single Sign On	Eliminate extra passwords and multiple portal login frustration
Secure email and file exchange	Enables messaging and file upload from within the portal or mobile app
Message notifications	Alerts customers to responses and messages waiting in their inbox
SafeTLS message delivery	Secure message and file delivery directly to a customer email inbox
Co-branded webmail portal	Enables quick addition of secure message center using a pre-configured webmail UI customized with company branding guidelines
Secure messaging APIs	Enables native integration and customization of secure message center features into financial services customer portals and mobile apps
Custom contact options	Establish multiple message options for exchanging information or inquiry based on the context of financial portal activity
Flexible routing options	Route customer inquiries based on subject lines or destination address selected from topical drop-down lists
Enterprise app integration	Client services reps receive and send messages from within their email clients, CRMs or contact centers for seamless case handling
Trusted security and verifiable compliance	Every message and file exchanged is encrypted, logged and tracked using a 'trust no-one' design

How It Works

The DataMotion SDX (Secure Data Exchange) services platform enables the rapid deployment of secure message center functionality in virtually any financial services client portal. The platform provides the connectors, APIs, protocols, SSO and point solutions necessary to quickly incorporate a co-branded webmail interface behind a financial services portal login, or create a custom UI within the financial services portal using secure messaging APIs. Interfaces and connectors for enterprise applications such as email clients, CRMs and contact centers provide the user interface and case tracking necessary to support client advisors and support representatives. Web service APIs enable secure message center functionality to be extended to financial services mobile apps for bi-directional communications as well.
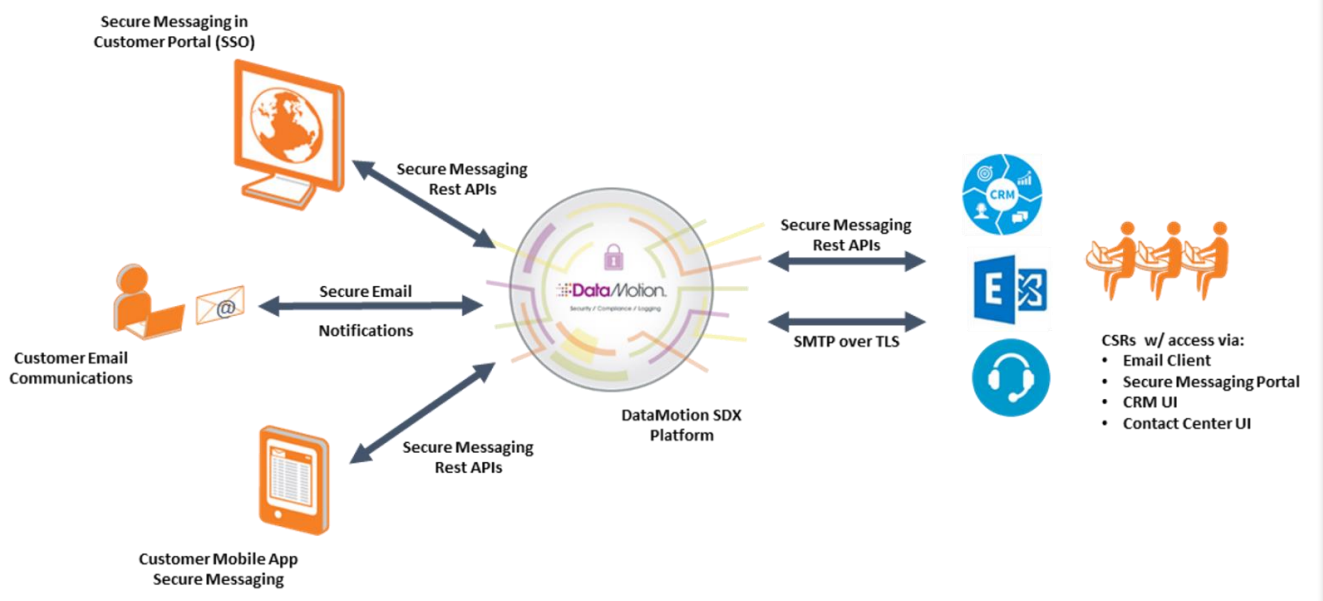
Solution Summary

Integrating a secure message center directly into your customer portal and mobile app is critical for great customer service and keeping your clients happy. DataMotion's secure message center solution features single sign on capablities which eliminates the need for multiple passwords and portals. In addition, encryption and detailed logging and tracking reports help you know that your messages are sent and delivered securely.

For more information on the DataMotion SDX platform and secure message center solutions for financial services, visit www.datamotion.com, or contact sales@datamotion.com.

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