A Customer Communication Management System; smart digital forms & digital signature
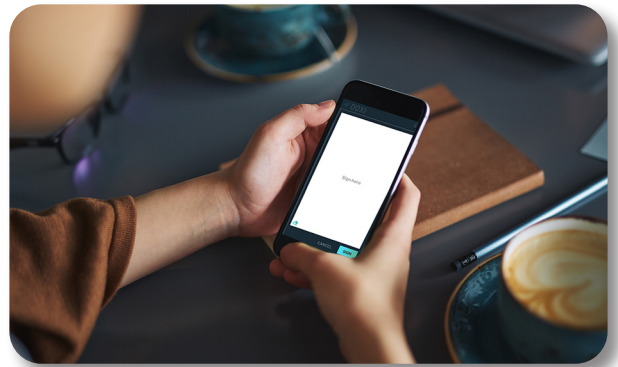
PB Digital is an advanced Customer Communication Management system (CCM) which enables organizations to easily create, manage and distribute business information—digital documents, invoices, marketing materials and more—tailored specifically to their customers' needs and preferred platforms—smartphone, tablet or PC, through a variety of channels—web, SMS, e-mail, web chat, WhatsApp and conventional mail. The System is used by hundreds of leading organizations throughout Israel, Europe and the US.

PB Digital creates smart, beautifully-designed interactive documents which help maximize the user's experience (UX/CX) and strengthen the customer's loyalty to the brand. With the addition of Doxi, Consist's advanced digital signature system module, the entire organizational workflow can now be fully digital, end-to-end.

CONSIST
Business Information Technology

Customer Communication
Management System

PB Digital
by Consist

Smart, interactive documents—it's all about great Customer Experience

One of the main goals of every organization is to cultivate effective communication with all its customers in order to strengthen customer loyalty to its products, services and brand. Among the various communication channels, the use of documents and smart forms sent by the organization to its customers is one of the most effective in maintaining customer loyalty. As a result, the scope of possibilities that can be derived from interactive documents as a live, active and bidirectional communication channel with customers can not be overstated.

From the point of view of customers, interactive documents enable them to receive focused, convenient, and efficient information and services when they operate within the document. In a reality where more and more customers are connected to various digital channels, the use of interactive documents is an important, effective and inexpensive way to improve communication between the organization and its customers. In addition, embracing interactive, digital documents enables organizations to transform their operations into digital from end to end, to streamline existing business and organizational processes, a process which can translate into increased operational profitability.

PB Digital's responsive digital forms provide advanced features such as **side-by-side** and **co-browsing** which make it very easy for the customer to fill out complex digital forms containing a large number of fields; **side-by-side** places the fields one above the other, saving the user the need to scroll up and down and sideways. PB Digital automatically places the information into position within the actual document, and the customer can easily click a button to preview the completed form.

Omni-channel communications

When a customer reads about your product on-line, fills out a request for information via his or her smartphone, and sends a contract signed in an email, that's multi-channel communication. The CCM strategy of each organization should adopt such means of communication, as it allows their customers to use several different devices and multiple access points before they complete the transaction.

The PB Digital system enables you to create the most effective communication with your customers without having to replace your organization's core systems. PB Digital will enable you to leverage the information from your existing systems, so you too will be able to offer interactions for more efficient and effective communication with your customers.

PB Digital - highlights

- **PB Digital is an advanced Customer Communication Management system (CCM), developed, marketed and implemented by Consist.** Consist in Israel as a part of the Consist Software Solutions Worldwide group, which has been in operation since 1975 and has over 1000 employees worldwide.

- **PB Digitial is used by hundreds of leading organizations in Israel, Europe and the US**, including Israel's largest health-care organization, leading banks and financial institutions, leading insurance companies and more. The System enables organizations to easily create, manage and distribute business information, in both digital and print, including customer forms, HR forms, purchasing and logistics documents, digital marketing materials and much more.

- **The Doxi digital signature module** enables organizations to easily distribute the documents to be signed by anyone using either a smartphone or desktop computer (Please see page 5 for further details.)

- PB Digital smart, digital forms are completely responsive, enabling users to tailor any message according to the customers' preferred platform—smartphone, tablet and PC.

- PB Digital enables organizations to transform their entire operations to digital, end-to-end, and manage all inner and external communication with a single, unified platform.

- PB Digital maximizes the customer's experience thus strenghening brand loyalty and customer retention.

- PB Digital opens up interactive, omnichannel communications between the organization and its customers, enabling them to communication with the organization's reps through a variety of channels, including WhatsApp, Facebook, Messenger, web chat and others. Through these channels, the organization can distribute digital marketing products and business information effortleslly, efficiently and inexpensively.

With GIDI, even grandma can easily fill out digital forms!
Our AI-based smart BOT (GIDI), makes it extremely easy to fill out forms using WhatsApp

PB Digital integrates a Smart, AI-based BOT (named Gidi) that enables users to fill out digital forms easily and efficiently using a regular WhatsApp diaglog. Gidi asks the questions, then fills out the fields according to the customer's response. With PB Digital, filling-out complicated forms is so conveneient and simple, even grandma can easily do it!

- **PB Digital makes it very convenient for customers and organizational users to fill out digital forms**, even on the small-size smartphone screen, thanks to advanced features such as Side-by-Side and co-browsing. The System can also incorporates a smart, **AI-based BOT**, which enables customers to **fill out digital forms via a regular chat and WhatsApp dialog**.

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What's new in PB Digital Version 7?

PB Digital today provides you with an advanced solution for comprehensive management of all the communication between the organization and its customers and internal users.

Smart digital forms for customer service, HR processes & purchasing

PB Digital 7 enables the organization to create smart digital forms and documents with advanced logic and to distribute them to customers and internal users via WhatsApp messages, web chat and other digital channels. In addition, PB Digital incorporates an AI-based BOT which asks the customer the relavent questions, verifies the data provided by the customers, and then places the data in the relavent fields within the document. The bot then automatically fills out the form, and the system produces a completed digital form - in either HTML or PDF format, and sends it to be signed by relavent parties.

Convert large amounts of existing organizational PDFs into digital and responsive documents - quickly and efficiently

PB Digital enables organizations to convert large amounts of existing 'closed' PDF documents to digital, and make them both responsive and accessible for the benefit of the visually impaired. Thanks to the System's revolutionary accessibility technology, a visually impaired person can create for himself, at a push of a button, an accessible version of every customer document that the organiztion has on hand. This improves customer's experience, while at the same time enabling the organiztion to comply by accessibility regulations and laws which exist in many countries.

Integrate Elementor with PB Digital!

PB Digital integrates with Elementor, one of the world's most popular drag and drop dynamic form and website builders, enabling you to easily design beautiful online forms in minutes, with much faster data processing.

Additional features in PB Digital Version 7

Multi-channel communication with customers by integrating with the GLASSIX platform
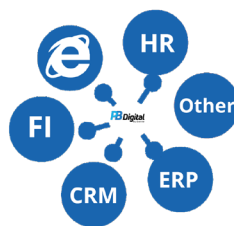
Internal organizational communication and interfacing to organizational core systems

Advanced forms catalog with search capability

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Doxi —a digital signature module to streamline approval processes

Doxi is an advanced digital signature system which streamlines organizational approval processes of documents such as purchase orders, agreements, contracts, invoices, HR forms for new employees and more. Doxi allows you to create, within seconds, an approval process for each organizational document and distribute it to the desktop computer and smartphones of the signatories who can sign using either their smartphone screen or the computer's mouse.

Doxi's unique benefits and features

A full REST API that allows it to consume the system's capabilities through the WS and interface with the organization's core systems • Doxi can be installed either in the cloud or on the company's internal servers • Doxi allows the user to easily select the names of the participants in the approval process and place the fields to be filled accordingly • The user can define groups of participants — "Senior Management members," for example—without having to create a new list from scratch for every new document • The system provides document templates with digitally signed fields that are automatically placed in the document • The approval process is easily tracked using Doxi's dashboard, and alerts can automatically be sent to signatories who hold back the process • Doxi provides the highest level of data security with three layers of protection - visual, digital and encrypted • Doxi is eco-friendly and eliminates the costs involved in paper and printing as well as the shipping, transporting and archiving expenses.

Organizational documents workflow example
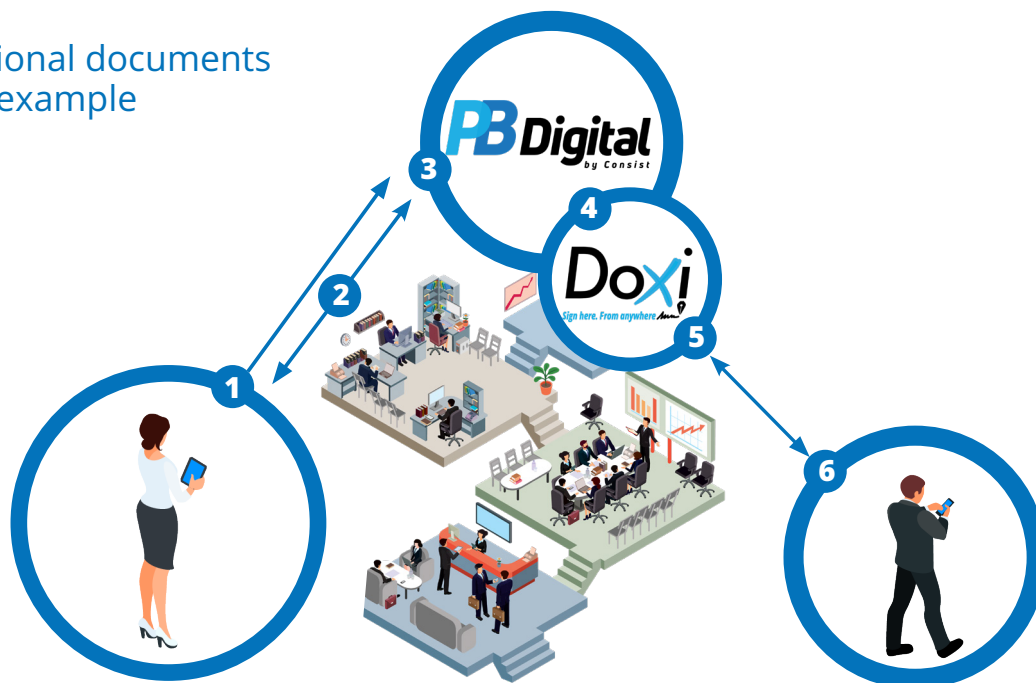
1. A customer requests a loan for a business deal.

2. The organization sends her an SMS with a link to an interactive digital form.

3. The completed form is received by PB Digital, which processes it and creates a PDF.

4. The PDF is loaded into Doxi and the fields to be filled are positioned into place.

5. Doxi distributes the PDF to the process participants' smartphones and PCs.

6. Participants can sign from anywhere, using their smartphones touch screen or PC.

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Creating an approval process with Doxi: quick and easy as 1, 2 ...done!
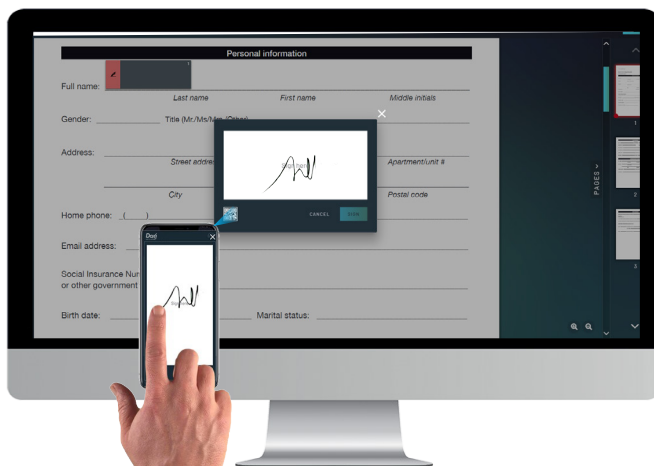

1. Upload the PDF document into Doxi
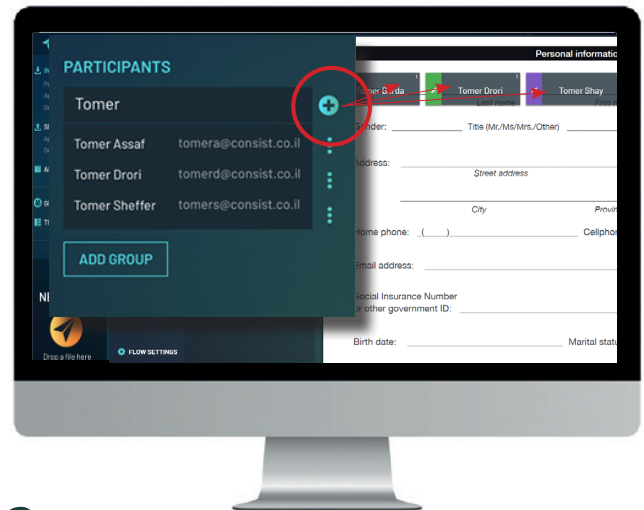
2. Select th participants in the approval process, locate the relevant fields, and… distribute!

DIgital signature from anywhere—using a smartphone's touch screen or PC

3. Participants receive an alert via both email and SMS and can sign: 1. Using their PC's mouse; 2. Using their smartphone's touch screen; 3. Scan QR code and sign using touch screen.
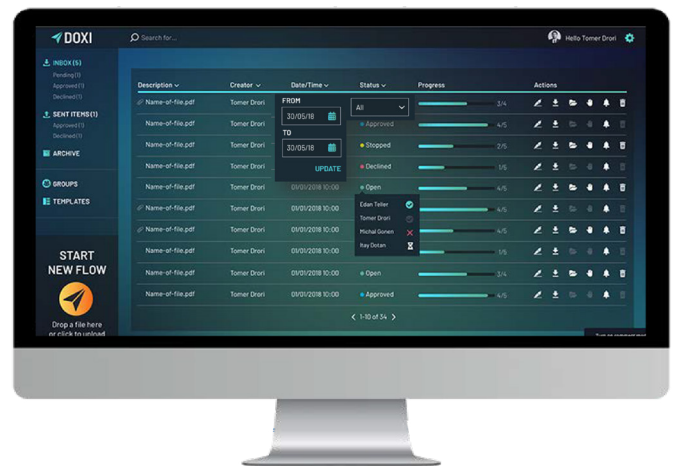
4. The process administrator tracks the progress of all the documents using Doxi's dashboard and can send alerts, whenever necessary, to participants delaying the process.

Pushing IT Forward!