

# Ongoing/Recurring Communications

A simple, yet secure, way to automate your recurring marketing and business communications with OneTouchPoint.

**Invalid Report Example**

Financial Company ABC | Invalids Report  
01/02/2024

The following file(s) have been received and validated:  
Test CDP 08/17/2023.pdf

The following record(s) were marked as invalid. Invalid records will not be processed further.

File Name	Error #	Reason
Test CDP 08/17/2023.pdf	1	Financial plan ID was not found in the Crosswalk
Test CDP 08/17/2023.pdf	2	Financial plan ID was not found in the Crosswalk
Test CDP 08/17/2023.pdf	3	Financial plan ID was not found in the Crosswalk
Test CDP 08/17/2023.pdf	4	Financial plan ID was not found in the Crosswalk
Test CDP 08/17/2023.pdf	5	Financial plan ID was not found in the Crosswalk
Test CDP 08/17/2023.pdf	6	Financial plan ID was not found in the Crosswalk

**Pushback Complete Report Example**

Financial Company ABC Pushback Complete

Financial Company ABC Pushback files are complete and ready for approval.

Proof Composed Date: 08/17/2023

Batch Group ID: 4616ca0b-0e40-4bad-ba48-caf5780c0f53

PDF Pushback ZIP Folders:  
TEST\_CLIENT\_20201027.zip  
TEST\_CLIENT\_20201029.zip

The PDFs must be approved or rejected before the process can continue.



**Data transfer**  
via a secure FTP



**Data captured & processed**  
through defined delivery processes (direct mail, PDF & fax)



**Output documents ready for approval;**  
automated customer notification for proofs



**On approval,**  
automated production process begins with turn-times based on SLAs



**Your message**  
delivered directly to your recipient's home

OneTouchPoint streamlines the automated processing of your communications from file receipt to delivery. With our certified, best-in-class processes, we accommodate end-user preferences of receiving communications via direct mail, PDF, or fax.

✓ **Complex, and efficient, automated data processing.**

Data is messy. Our system intakes your complex data, then validates, segments, and transforms it into the final product based on your business rules.

✓ **Comprehensive reporting package.**

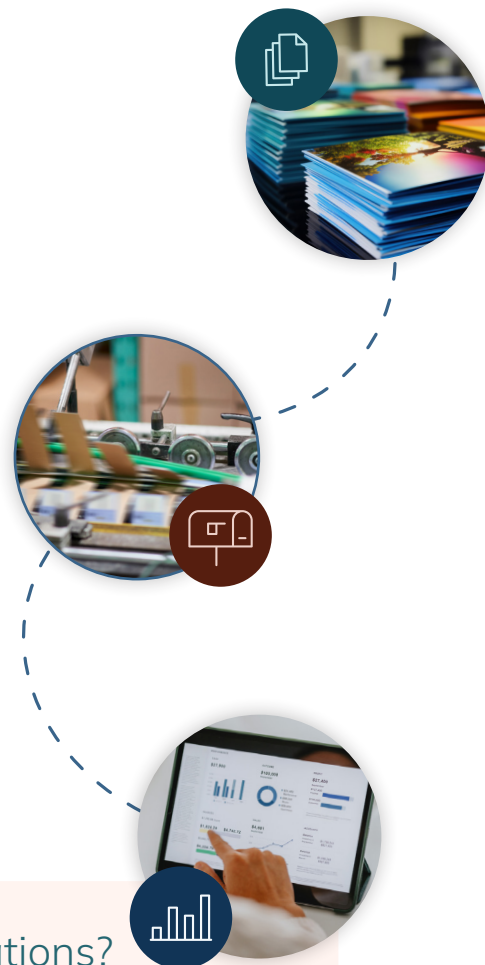
Full reporting includes: file reconciliation, address validation, data validation, and delivery completion.

✓ **Variable data & dynamic composition.**

Our crosswalk driven platform allows for highly complex data compositions that ensures your customers see the only data they should see. Every time.

✓ **Secure file transfers.**

Our platform is customizable to meet your business requirements. Send data daily, weekly, monthly or based on customized timing.



## Are you using PII or PHI in your communications?

We offer an OTP One Secure Communications platform for healthcare and financial organizations.

- ✓ HITRUST certified / SOC 2 compliance. Certified workflows and secure FTP sites, ensures that your data is always secure.

Ready to learn more about OneTouchPoint's Ongoing/Recurring Communications services?

To learn more go to [1touchpoint.com](https://1touchpoint.com)  
call 800-332-2348  
or email [info@1touchpoint.com](mailto:info@1touchpoint.com)

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