



OL[®] Connect

Print and Mail Production Playbook

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Upland Objectif Lune

Document composition and automation software

Upland Objectif Lune helps organizations to optimize transactional and promotional documents by automating manual processes to enable digital transformation without changes to existing systems or additional infrastructure investments. Our product **OL® Connect** helps users create, manage, distribute and automate transactional and promotional documents while solving the challenge of integrating systems.

OL® Connect includes features such as:

Document Composition

Design or repurpose any documents, create multi-channel communications, leverage data to build dynamic documents across systems, and enhance them using text, images, variable data, and more.

Process Automation

Automate processes and integrate with existing and third-party applications. Apply corporate standards and guidelines for creating, processing, and delivering communications and trigger business processes with ease.

Multi-channel Output Management

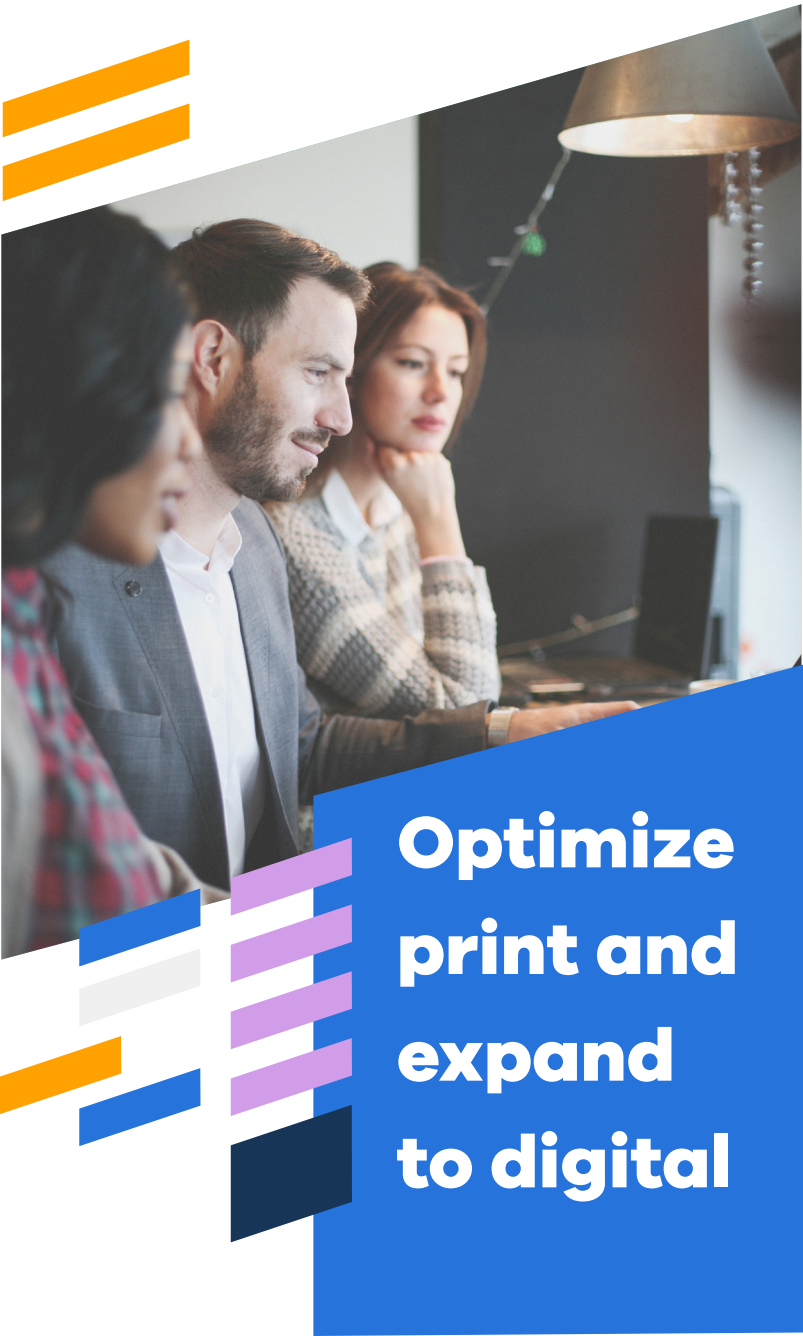
Enable print or digital document distribution in various output formats. Utilize advanced features such as batch printing, sorting, and finishing to maximize print production control with optimized output formats.

Remote Printing

Simplify submission of print-ready documents, centralize print jobs, and facilitate digital communications. Ensure brand consistency and enable faster approvals processes from any location.

Integrations

Integrate seamlessly with most Enterprise Content Management and Document Management systems, email, digital signature, and print production systems and interact with existing structures such as Enterprise Resource Planning/ Line of Business systems or mainframe. Modernize, digitize, and transition outbound communications from legacy systems.



**Optimize
print and
expand
to digital**

Powerful print production software



80%
of consumers act on direct
printed mail advertisements*

OL® Connect is a powerful production print software, enabling a wide variety of production print applications on print production and mail systems. The OL Connect technology provides features, empowering production print professionals to address and deliver against a wide variety of job requirements, increasing efficiency and capacity in their organizations.

OL Connect delivers fully automated document creation and print routines that can scale capacity across multiple servers for the largest production print operations.

The OL Connect toolset includes simple to complex document composition from a wide variety of data formats, production print queue management, job imposition, folder inserter control, mail integration and the ability to transition to multi-channel digital output when necessary.

Businesses can improve print and expand their communications to digital outputs, such as email and web. The variety of outputs available in OL Connect gives the freedom to distribute documents regardless of the destination or channel selected and drive further interaction with the recipients.

Integration with third party systems and applications can enable functionalities such as print production systems, e-invoicing, collecting secure digital signatures, indexing, and archiving transactional documents into Document Management and Enterprise Content Management systems.

*Source: Newsworks/Hearst Bay Area/MarketingProfs

Bring print and mail operations in house

Enhance your mailing and business communications

OL® Connect

Printed correspondence remains an important means of communication, especially when it is of high-quality design, individualized, and tailored to the recipient.

Manually time-consuming and ever-recurring works steps occur, from creation and data connection to the output and sending of the documents.

OL Connect allows document components to be combined with dynamic and personalized information and then sent to customers.

OL Connect is designed to run print devices at their most optimal speed possible, increasing efficiency and productivity. In production environments, many processes can be optimized and automated for print and post-processing. With the rise of digital technologies, consumers expect to have alternatives to print and options for digital communications.

OL Connect is available in two license editions: Professional and Enterprise. These license editions include varied options and features.

Lorton Data

OL Connect and Lorton Data provide a single streamlined and optimized solution to create end to end processing and tracking of barcoded mail. The integrated solution empowers organizations to reduce manual handling, automate repetitive tasks, and save on mailing costs.



Choose the options that fit your needs

- **Production print**
Boost print production and print high volumes at high speed. Utilize optimized print formats for reduced file sizes and faster printing process.
- **Production automation**
Easily manage post-processing and production requirements.
- **Optimized mail**
Streamline mail preparation processes and eliminate the manual and repetitive tasks to improve efficiency and maximize postal discounts.
- **Correspondence management**
Generate personalized, consistent, and timely multi-channel communications with ease. Improve efficiency and maintain regulatory compliance.
- **Multi-channel communications**
Transition from print output to digital channels including email, web, mobile, and automated archiving and drive further interaction.

Print and mail workflow

1



DATA & DOCUMENT INPUT

Extract data and documents from virtually any source or system: raw data, PDF, and

OL Connect Send.

XML, JSON, Excel, Text, PostScript, PCL files and more

2



DATAMAPPING & DESIGN

Design, enhance and re-purpose any communication.

Fill templates with dynamic text, graphics, images, barcodes, and more

3



ORGANIZE OUTPUTS

Put some conditions and logic into your print outputs.

Group, sort, batch files, and enable postal sorting

1. Data input

OL Connect collects data from a variety of sources and combines these inputs into a single run to maximize postal savings.

Raw data: Insert data and documents from any system - ERP, CRM, legacy systems, etc. Data file types: XML, JSON, Excel, Text, PostScript, PCL files and more.

PDF: Extract data from PDFs such as customer addresses, product information, invoice numbers, etc.

OL Connect Send: Receive documents and job specifications from a remote printer driver. Business users can submit documents, create custom interactive workflows, and enter job-specific details remotely.

2. DataMapping

OL Connect offers advanced features to tag data, simplify document design and assembly steps, and build complex workflows. Leverage data extracted during the data mapping process to compose, enhance and re-purpose documents.

2. Design documents

OL Connect encompasses powerful composition features to design, style, format, and personalize communications. Add barcodes and folder inserter control marks within documents to enable mail compliance and send documents directly from printers to folder inserters.

3. Organize outputs

OL Connect incorporates print presets which contain several printing options including the destination. Jobs can be separated into batches across multiple printers. Documents in batch jobs have necessary folder inserter control marks to automate folding and inserting.

Batching: Gather documents from multiple sources and customers into a single batch for more efficient print and mail runs. Documents can be grouped once in a batch.

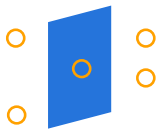
Grouping: Group documents by data-driven criteria and enable sorting.

Sorting: Specify print delivery options and organize the data on the documents.

Postal Sorting: Collect all addresses in a run and deliver to regional postal sorting applications for postal discounts.

Automate your operations

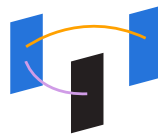
4



PRINT OUTPUT

Optimize print and easily manage production requirements.

PostScript
AFP/IPDS*



PRINT MANAGEMENT

Monitor and prioritize print jobs

OL® Connect Print Manager
Integrate with third-party print management applications



INSERT & MAIL

Enable precise control during the finishing process.

Folding, inserting, and enveloping

6

4. Print output

OL Connect includes various features and options that increase key productivity settings to help you print faster and boost efficiency.

Parallel jobs: Process multiple jobs concurrently for quicker end to end processing.

Speed: Expand the rate at which each job is generated and process more jobs simultaneously.

Optimized output: Speed up processes by creating smaller files and printing documents in batches.

Optimized PostScript: Reduce errors and time spent for manual production processing of jobs by utilizing features such as media selection, tray pulling, subset stapling and print presets.

AFP/IPDS*: Enhance control over print production in high-volume environments.

Supports various print languages

PostScript: Optimized

PCL: Printer Command Language

AFP: Advanced Function Presentation

IPDS: Intelligent Print Data Stream

PPML: Personalized Print Markup Language

*Options available only with **OL Connect Enterprise**

5. Print management

OL Connect offers flexibility with its dual capabilities. It comes equipped with an intuitive print management interface that simplifies job ticket handling, print queue management, and printer status monitoring. OL Connect is also designed to seamlessly integrate with third-party print management software, providing a collaborative platform that enhances print job control capabilities.

- | Simplify job handling and reduce manual labor
- | Ensure a smooth and effective workflow
- | Cut production time and minimize human error

6. Insert and mail

OL Connect communicates with inserters, envelope machines, and finishing equipment as part of a closed-loop system. Once printing is completed, it confirms the correct information is provided to the other machines to handle jobs properly. Precise tracking and control in the finishing process is facilitated by adding OMR marks or barcodes to the documents. This verifies every document is folded, inserted, and enveloped correctly establishing superior quality and accuracy.

Lorton Data

Automated mail data processing solution

Leverage **OL® Connect** and **Lorton Data** automation to print and mail. USPS reports, tray tags and itemized billing all happens as part of an automated workflow, eliminating the need for postage machines, stamps and manual process.

Lorton Data offers an Electronic Certified Mail® solution which reduces labor time and expenses.

Key Features

- Save on costs and increase mail processing efficiency
- CASS Certified™ ZIP + 4® coding, NCOALink® processing, Dupe ID / Elimination, DSF2®, and PAVE™ Certified Postal Presort are included in the basic service.
- Easy maintenance and no directories to install mean less dependence on valuable resources
- Automatic updates assure that you are accessing the most up-to-date mail data processing available
- Electronic Certified Mail®

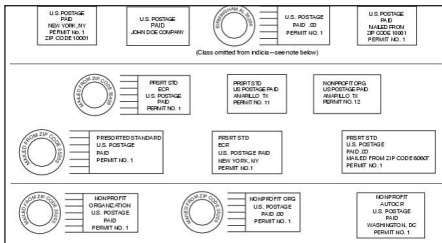
1



2

Filename	File description	Associated input file	File type code
manifest.txt	Table of Contents' list of files for "3918739.zip"		00
layout_presort.pdf	Presort layout	IP	
readme.html	README file	81	
layout_c.pdf	Output 'C' layout	1C	
test2.cas.pdf	CASS report	3918739file.zip 20	
test2.ncs.pdf	NCOALink moves report	3918739file.zip 36	
test2.dupes.csv	Dupe sets file	3918739file.zip C2	
test20c.pjs.pdf	Presort job summary report	3918739file.zip 61	
test20c.msl.pdf	Presort mail sort listing	3918739file.zip 62	
test20c.360.pdf	Presort postage statement form	3918739file.zip 63	
test20c.pqr.pdf	Presort qualification report	3918739file.zip 64	
test20c.psl.pdf	Presort summary listing	3918739file.zip 65	
test20c.cps.pdf	Presort consolidated postage statement register	3918739file.zip 68	
test20c.mall.dat.zip	Presort mail.dat file	3918739file.zip 0H	
test20c.trp.pdf	Presort tray tags file	3918739file.zip 6T	
test20c.CSV	Presort input file	3918739file.zip C2	
test20c.csv	Output file--Comma-delimited	3918739file.zip CC	
test2.reports.pdf	Report file	3918739file.zip 6Z	

3



4

The USPS Marketing Mail permit form, titled 'United States Postal Service Postage Statement—USPS Marketing Mail'. It includes sections for Permit Holder information, Mailing Agent details, Mail Owner information, and a detailed breakdown of postage charges including Total Adjusted Postage Permitted, Total Adjusted Postage Permitted Required, and Total Adjusted Postage Simplified Addressing (ESDM).

5

An itemized postage statement from USPS. It shows a 'Rate Summary' table with columns for 'Automation', 'Automation (AD)', 'Automation (AD) (AD)', and 'Automation Total'. The total postage is listed as 283.456. The statement also includes a 'Postage Statement' section with details on postage-paid status and item counts.

1. USPS Tray Tags

Generated tray tags for outbound mail helps identify and streamline processing of mail pieces.

2. Lorton Data Log File

Digital log file created in **OL Connect** workflow detailing all processed mail.

3. Mail Permit Indicia

Helps eliminate stamp application or running mail pieces through a postage machine.

4. Postage Statement

Auto generated postage statement to reconcile USPS postage billing.

5. Electronic Mail Manifest

Sent to USPS electronically to streamline the receipt and processing of your mailing.

Elevate your business communications

OL® Connect enhances these document types



Promotional Documents

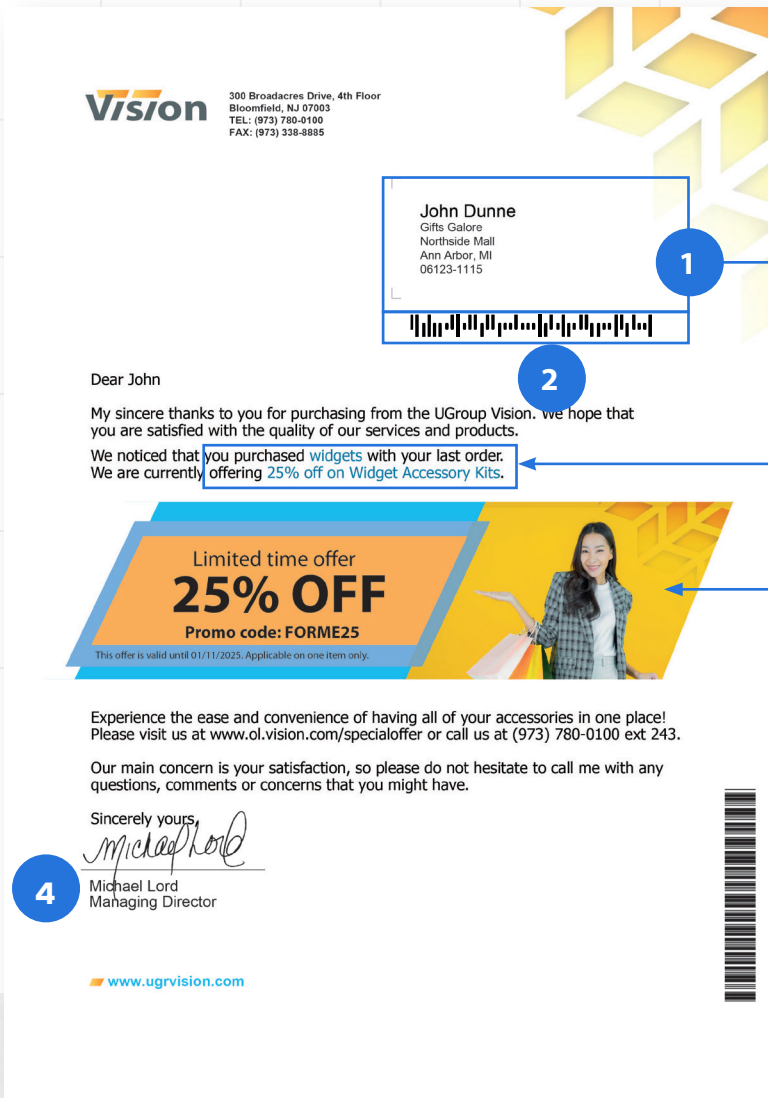
- Direct Mail
- Mailing
- Letter
- Postcard
- Newsletter
- Coupon
- Point of Sale
- Welcome Letter
- Business Card

Transactional Documents

- Invoice
- Statement
- Delivery Note
- Check
- Reminder/Dunning Notice
- Credit Note
- Order Confirmation
- Shipping Label
- Picking List
- Packing List
- Work Sheet
- Collections Letter

Samples

Personalized Letter



1 **Mailing address** is utilized to send a promotional letter.

2 **Intelligent Mail Barcode:** USPS mail preparation features with intelligent mail barcodes enabling mail compliance.

3 **Set conditions** that target appropriate products to the customer based on their recent purchases. In this case, when the product code for a widget is found in the data stream, a letter with a special offer on that product.

4 **Personalized signature** from specific sales rep for this customer.

Samples

Transpromotional Invoice

300 Broadacres Drive, 4th Floor
Bloomfield, NJ 07003
TEL: (973) 780-0100
FAX: (973) 338-8885

INVOICE# 02880
CUSTOMER# 08160
SALES REPR# 09168
INVOICE DATE 10/20/08
SHIP DATE 10/25/08

Delivered to
Jonh Dunne
Gifts Galore
Northside Mall
Ann Arbor, MI
06123-1115

Total	45181.82
10% Discount	4518.18
Sales Tax	3162.73
Shipping	24.00
INVOICE GRAND TOTAL	48368.55

QTY ORDER	UNIT EACH	QTY BACK	QTY SHIPPED	PROD CODE	DESCRIPTION	TOTAL COST
57	Box	7	50	91	DOORKNOBS	2872.50
71	Pod	5	66	883	CELLOPHANE - BLUE	622.38
33	Bag	1	32	416	WIDGETS - LARGE	2998.08
81	Doz	1	80	517	TOENAIL CLIPPERS	7642.40
77	Ea	4	73	118	CELLOPHANE - RED	846.07
3	Box	2	1	632	WIDGETS - LARGE	78.02
61	Pod	6	55	718	CELLOPHANE - PLAID	2288.55
3	Bag	7	4	185	CELLOPHANE - BLUE	-331.96
41	Doz	1	40	439	CELLOPHANE - BLUE	3750.80
85	Ea	2	83	603	CELLOPHANE - BLUE	6792.72
14	Box	8	6	184	WIDGETS - MEDIUM	137.62
92	Pod	3	89	778	WIDGETS - SMALL	7567.67
7	Bag	0	7	55	BALLS - PING-PONG	359.59
27	Doz	1	26	406	BOLTS - LIGHTNING	1761.50
83	Ea	1	82	132	HOOD ORNAMENTS	819.18
18	Box	5	13	965	WIDGETS - MEDIUM	480.48
0	Pod	9	-9	95	DOORKNOBS	-505.44
68	Bag	9	59	595	WIDGETS - LARGE	3796.06
35	Doz	1	34	364	CELLOPHANE - PLAID	902.40
56	Ea	6	50	868	WIDGETS - LARGE	2403.00

Limited time offer
25% OFF
Promo code: **GET25OFF**

This offer is valid until 01/31/2009.
Applicable on one item only.

REMITTANCE COPY

PLEASE RETURN THIS REMITTANCE COUPON WITH YOUR PAYMENT

300 Broadacres Drive, 4th Floor
Bloomfield, NJ 07003
TEL: (973) 780-0100
FAX: (973) 338-8885

Jonh Dunne

Account # : 08160
Due Date : 10/25/08
Total Amount Due : \$ 48368.55

Check box for account information changes.
See reverse side of billing statement.

Check box for Automatic Payment Plan form.

Please indicate amount enclosed:
\$

Checks are payable to:
Vision P.O. Box 55555
Butler, NJ 55555-5555

Please print your account number on the check.
Allow 5-7 days for mailing to ensure payment is delivered by the due date.

7070081608 972266664 **REMITTANCE NOTICE**

300 Broadacres Drive, 4th Floor
Bloomfield, NJ 07003

John Dunne
Gifts Galore
Northside Mall
Ann Arbor, MI
06123-1115

300 Broadacres Drive, 4th Floor
Bloomfield, NJ 07003
TEL: (973) 780-0100
FAX: (973) 338-8885

John Dunne
Gifts Galore
Northside Mall
Ann Arbor, MI

Dear John

My sincere thanks to you for purchasing from the iGroup Vision. We hope that you are satisfied with the quality of our services and products.

We noticed that you purchased widgets with your last order. We are currently offering 25% off on Widget Accessory kits.

Limited time offer
25% OFF
Promo code: **FORME25**

Experience the ease and convenience of having all of your accessories in one place! Please visit us at www.igvision.com/specialoffer or call us at (973) 780-0100 ext. 243.

Our main concern is your satisfaction, so please do not hesitate to call me with any questions, comments or concerns that you might have.

Sincerely yours,
Michael Lord
Michael Lord
Managing Director

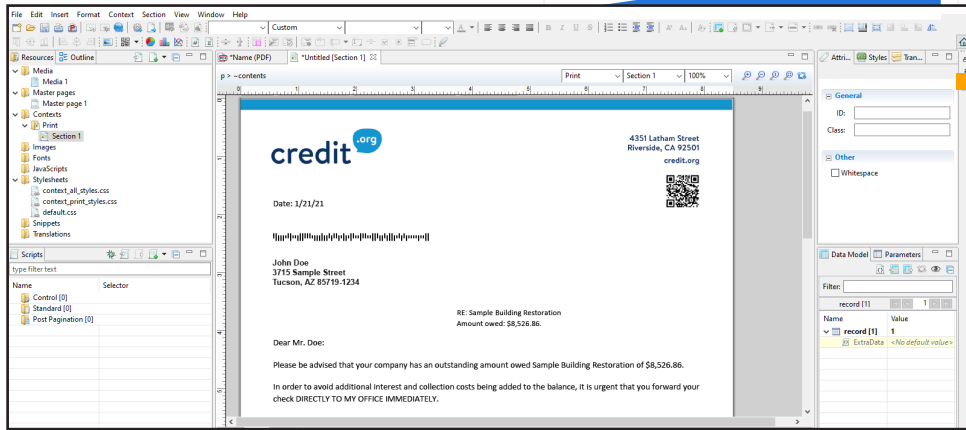
- OL® Connect dynamically places variable data** such as: to, from, CC, subject fields, salutations, invoice totals etc.
- Highlight customer contact and help information** and make it easier for customers to contact you for any queries.

- Personalize information for each customer with dynamic elements** such as images, text, graphs, charts, and promotional codes and offers.
- Schedule delivery:** send out every month, week, day, or on-demand, forever or until the customer decides otherwise.

Features

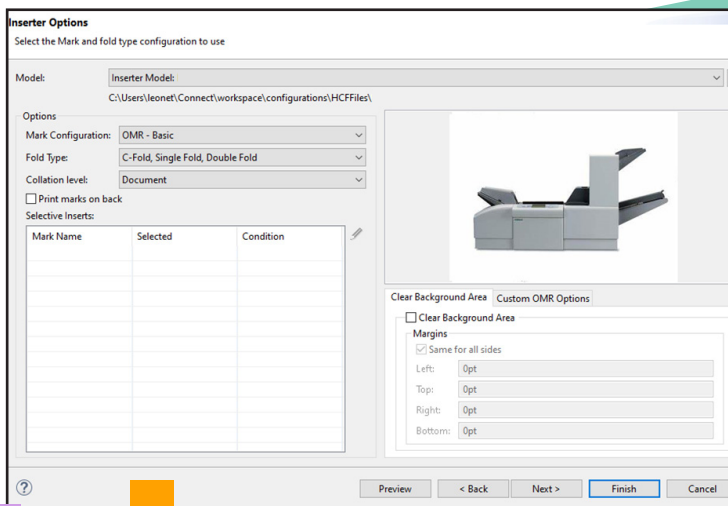
PDF Output Support

A wide variety of PDF features are available within OL Connect. In this example a debt collect letter (PDF) is used as a background resource and updated with corrected address from mail prep automation. Other capabilities include adding and removing PDF pages, adding barcodes to PDF documents, inserting separator pages for batch PDF printing, media and paper handling control, finishing for PDF pages, and PDF re-composition.



Folder Inserter Wizard

Use the built in folder and inserter wizard to add control marks and barcodes to OL Connect documents. All folder inserter manufacturer models that recognize OMR or barcodes for folder inserter control are supported.



- Code 39
- Code 39 Extended
- Code 93
- Code 93 Extended
- Code 128
- Codabar
- MSI
- UPC-A
- UPC-E
- Industrial 2 of 5
- Interleaved 2 of 5
- Matrix 2 of 5
- EAN-8
- EAN-13
- GS1-128
- IMPB
- Postnet
- OneCode
- Royal Mail 4 State (RM4SCC)
- KIXCode
- Australia Post
- Japan Post
- QR
- Data Matrix
- GS1 DataMatrix
- Royal Mail Mailmark
- PDF417

A wide variety of barcodes are included, which enables support for any folder inserter models that can recognize folder and inserter control marks.

Features

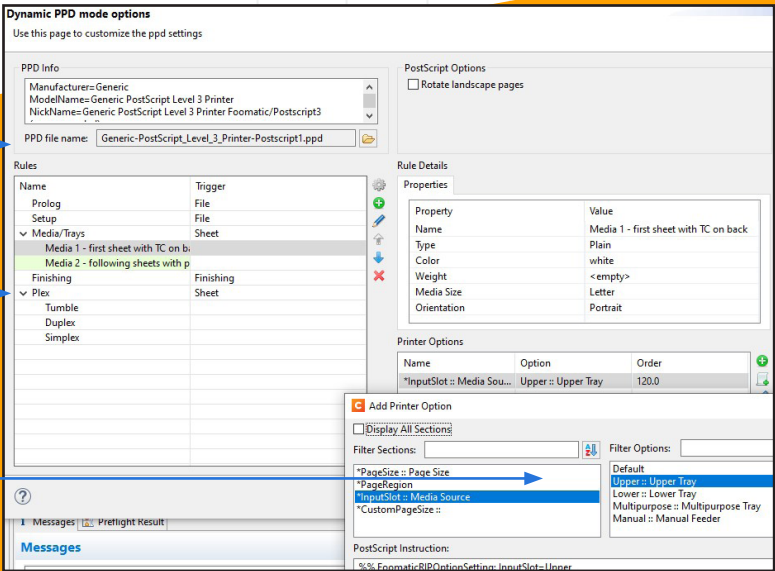
PPD Wizard

Control model specific media calls, paper handling and finishing within OL Connect designer, utilizing the PPD wizard.

PPD for specific print engine selected

Select media type from OL Connect designer

Associate selected media type from designer with printer input tray or media.



Imposition Wizard

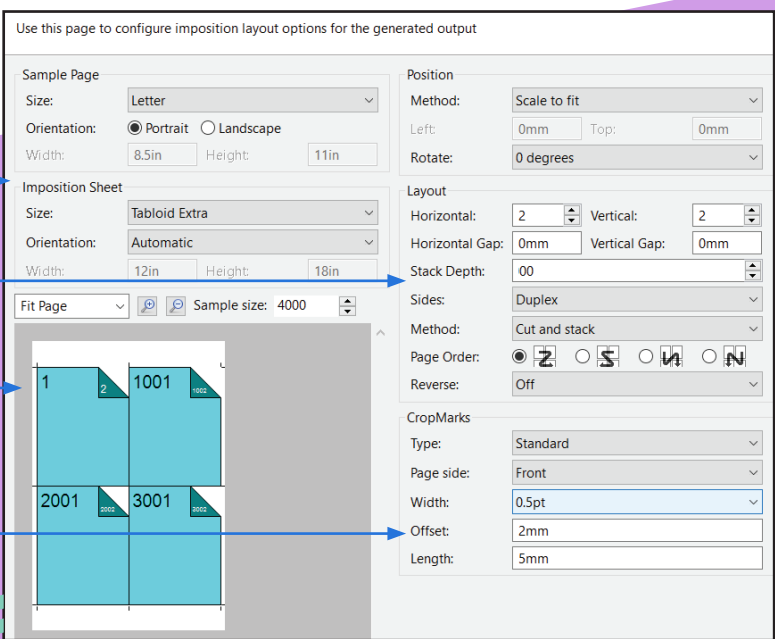
Imposition wizard allows for quick configuration of imposed production print.

Select imposition sheet

Configure cut and stack properties

Graphical representation of output

Control cutter marks

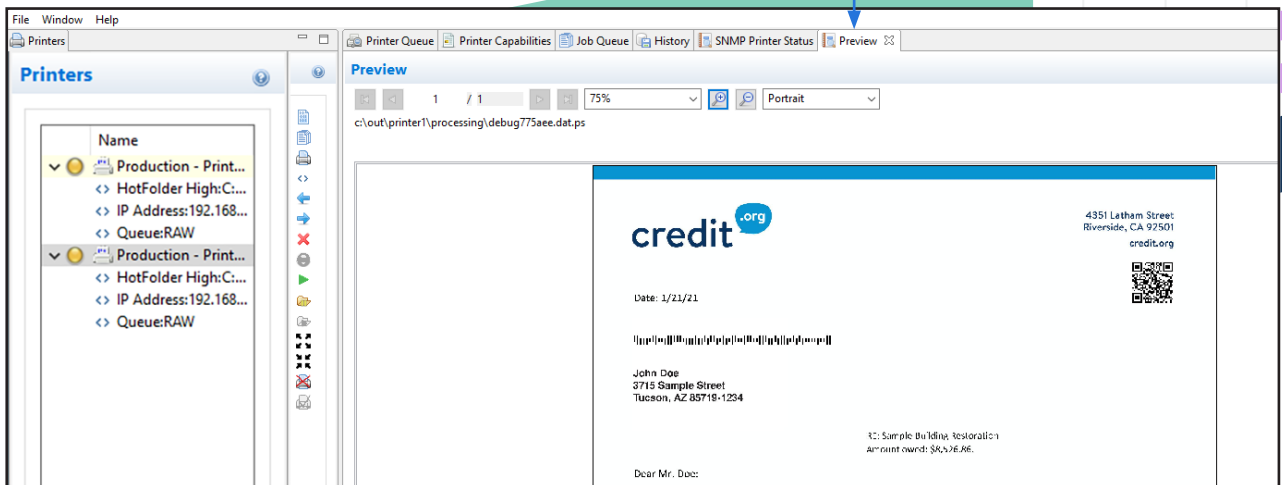


Features

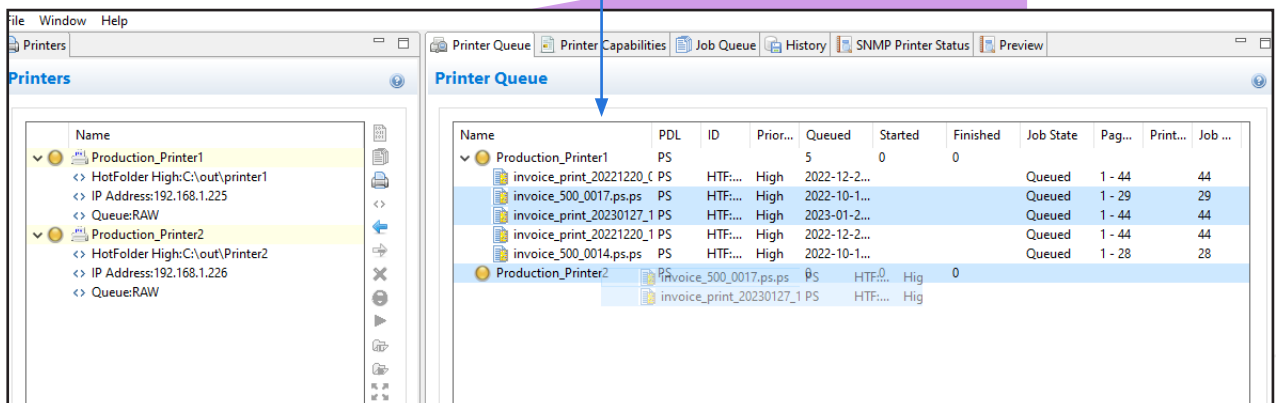
Print Manager*

The print manager provides print room operators with a workstation-based interface to control job flow across any number of production printer queues. Features include queue start or stop, job priority, job preview, job history, SNMP printer status monitoring, and job resubmission to same or different queue.

Print manager allows operator to preview jobs in queue



Simply click, drag and drop to move jobs from one production printer queue to another



*The print manager is only available with **OL Connect Enterprise**

OL[®] Connect Edition Comparison Table

OL[®] Connect Professional is best suited for medium to large-sized businesses with standard production output.

OL[®] Connect Enterprise is tailored for the high-volume production output market and comes with AFP/IPDS options and the print manager.

All rows apply to both term and perpetual licenses

Performance

Achieved performance depends on numerous factors, including CPUs, RAM, storage speed, software configuration, solution complexity, etc.

1 – From hundreds to thousands

2 – From thousands to hundreds of thousands

Target printers

Email volume

PDF volume

Max parallel jobs

Number of jobs that can be run simultaneously. A job is a group of one or more documents being generated as a single batch

Max machines

Number of machines that can work together on single or multiple jobs. A machine is a PC or VM that runs the OL Connect Server application

Input data types

Excel/CSV, Database, JSON, XML

Text, PDF, PostScript

Most PDF formats are supported. Metadata from PDF/VT can also be extracted

PCL (includes 3rd party license)

AFP (includes 3rd party license)

IPDS data is not supported. Metadata from AFP can also be extracted

	OL [®] Connect Professional	OL [®] Connect Enterprise
Desktop MFP		Production Roll-fed
Email volume	Medium ¹	High ²
PDF volume	Medium ¹	High ²
Max parallel jobs	8	64
Max machines	1	4
Excel/CSV, Database, JSON, XML	●	●
Text, PDF, PostScript	●	●
PCL (includes 3rd party license)	○	○
AFP (includes 3rd party license)		○

Legend

Blank

Not available



Features that are now included with OL[®] Connect license as part of the 2023 price list



Features that can be purchased as separate options

OL® Connect Professional

OL® Connect Enterprise

Workflow

Lights out operation

Runs as a series of services and helpers



Capture data from anywhere

Among others: hot folders, Windows & LPD print queues, email, HTTP, DB queries, OneDrive, FTP/S



Conditional routing

Create branches based on data values or dynamic conditions



Parallel processing

Multiple processes run simultaneously on single and multiple jobs



Multiple business processes

Implement business rules for each type of process that requires automation



Automate OL® Connect operations

Automate the extraction of data and the generation of documents using flexible and complete scheduling



Multiple output destinations

Output simultaneously to printers, folders, FTP, email, OneDrive or a number of Document Management Systems



Third-party connectors

Docuware, Therefore, SharePoint, M-Files



PlanetPress Suite compatible

Generate PlanetPress Classic documents



Classic PSM connector

Send jobs to PrintShop Mail Classic



Classic PReS connector

Send jobs to PReS Classic



Imaging module

Includes Image, Fax and Search functionality



Legend

Blank

Not available



Features that are now included with OL® Connect license as part of the 2023 price list



Features that can be purchased as separate options

Output formats

PDF, PDF/A, PDF/VT

Includes PDF/X, Factur-X, ZUGFeRD

PostScript

PS level 2 or 3, with full PPD control

PCL

AFP/IPDS

Output management

Windows printing

Send to local or shared Windows printers

Document splitting

Split the output job in batches or as individual documents

Impositioning

Order and arrange multiple pages on sheets

Finishing

Control every printer feature

Optimized output (VIPP, VPS, PPML)

Specialized print formats for optimizing certain devices

Reusable job presets

Save filtering, grouping, and sorting options to reusable presets

Reusable output presets

Save output options to reusable presets

File creation

Generate files on disk

LPR printing

Send directly to LPD queues

Print Manager

Manage and prioritize print jobs manually

OL® Connect Professional

OL® Connect Enterprise

	OL® Connect Professional	OL® Connect Enterprise
PDF, PDF/A, PDF/VT Includes PDF/X, Factur-X, ZUGFeRD	●	●
PostScript PS level 2 or 3, with full PPD control	●	●
PCL	●	●
AFP/IPDS		●
Windows printing Send to local or shared Windows printers	●	●
Document splitting Split the output job in batches or as individual documents	●	●
Impositioning Order and arrange multiple pages on sheets	●	●
Finishing Control every printer feature	●	●
Optimized output (VIPP, VPS, PPML) Specialized print formats for optimizing certain devices	●	●
Reusable job presets Save filtering, grouping, and sorting options to reusable presets	●	●
Reusable output presets Save output options to reusable presets	●	●
File creation Generate files on disk	●	●
LPR printing Send directly to LPD queues	●	●
Print Manager Manage and prioritize print jobs manually		●

Legend

- Blank** Not available
- Features that are now included with OL® Connect license as part of the 2023 price list
- Features that can be purchased as separate options

Engage with us.

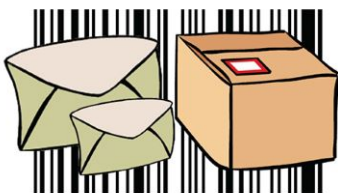
Upland Objectif Lune helps companies automate their business communications with our digital transformation solutions. We create, manage, distribute, and automate transactional and promotional documents while solving the challenge of integrating systems.

If you'd like more information on our product, contact our team to set up a comprehensive product demonstration.

Reach out to learn more



uplandsoftware.com/objectiflune
[Request a demo](#)



WALZ

Label & Mailing Systems
624 High Point Ln, East Peoria, IL 61611-9329
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www.walzeq.com email: walz@walzeq.com