

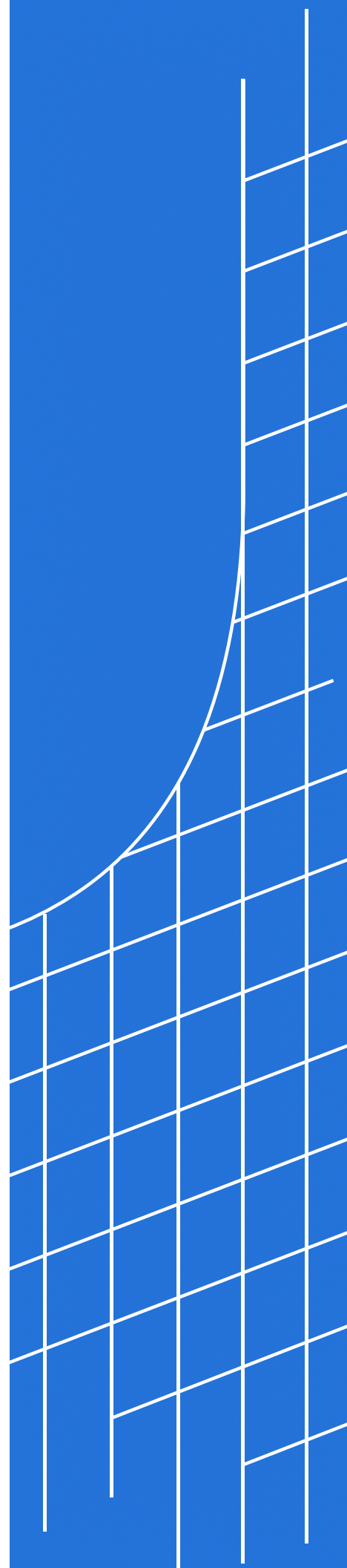


# OL<sup>®</sup> Connect

Document Composition and Automation  
Software for Financial Services

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# Upland Objectif Lune

## Document composition and automation software

Objectif Lune's OL Connect technology automates manual processes for creating, managing, and distributing transactional and promotional documents. By increasing efficiency and modernizing multi-channel communications, companies make significant progress in their digital transformation journeys while increasing their competitive edge. As an added benefit, OL Connect software extends the functionality of existing systems without additional infrastructure investments.

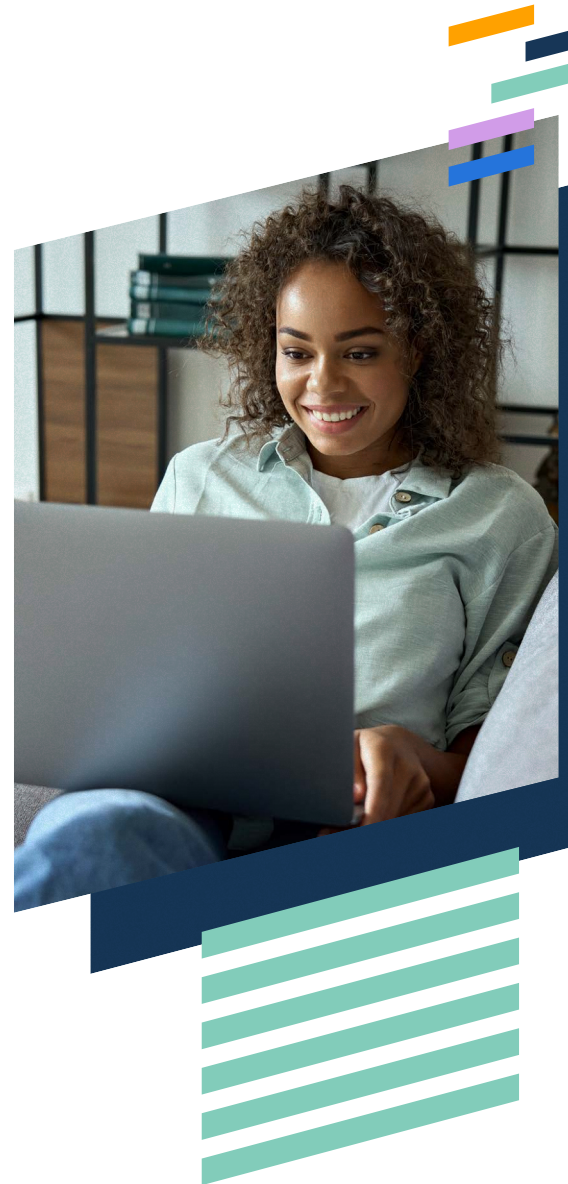
### Banking and financial institutions

Technology is transforming every aspect of banking and financial services including communications.

Customers expect banks to provide an experience that is personal, convenient, and meaningful. They want to receive tailored information through various delivery options, including email, SMS, web, or traditional printed letters.

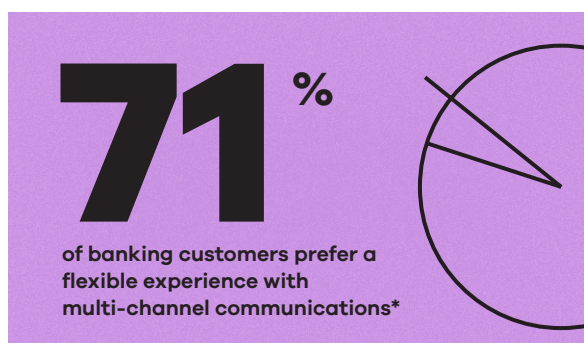
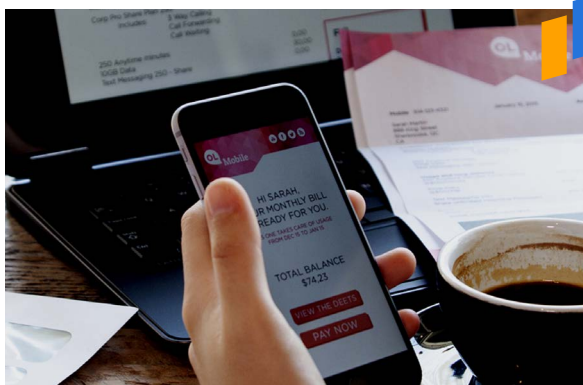
Many financial firms still rely on manual processes to distribute communications, which limits staff productivity and increases the risk of error. This hinders the ability for businesses to comply with privacy and data management regulations and industry mandates.

Financial institutions must invest in solutions to thrive in the current competitive market. These include digital tools that simplify internal systems while maximizing team productivity. Equipped with the right technology, employees can easily and quickly manage large volumes of data to create personalized documents and deliver communications through a variety of ways.





# Unlock digital opportunities in banking and financial services



OL Connect offers the financial industry a flexible and optimized solution to ensure smooth and efficient business operations while improving customer experience through personalized and interactive communications via preferred channels.

By implementing OL Connect, financial institutions can improve efficiency with innovative processes and enrich customer correspondence with custom messaging sent through various outputs such as print, web, email, SMS, and more.

The software acts as middleware, expanding the capabilities of existing systems and eliminating integration bottlenecks without requiring additional infrastructure investments.

## Business drivers

Technology is becoming a key competitive differentiator between banks and financial institutions

Client expectations for electronic communications, flexibility, and control are increasing

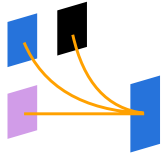
Banks need to keep a close watch on the effectiveness of their compliance policies

With OL Connect, organizations can easily create, manage, automate, and distribute transactional or promotional documents such as member statements, customer communications, policies, bond certificates, loan documentation, and more. By delivering modern, targeted, and interactive messaging, businesses can increase customer engagement and loyalty.

Financial institutions can leverage OL Connect to exceed customer expectations, empower employees to be more productive, boost profitability, and gain a competitive advantage in the market.

# Transform operations and drive efficiency with automation

Eliminate manual tasks, banish integration bottlenecks, and boost productivity



## Simplify daily work

Digitize and automate workflows to maximize employee productivity. Eliminate manual intervention, error-prone tasks, stacks of paper, and missing files.



## Flexible design tools and delivery

Create engaging, concise, modern statements and customer correspondence across multiple channels without losing context and continuity.



## Powerful data integration

Manage all your content and data from any source, line of business, or legacy systems. Easily populate documents and workflows with captured data.



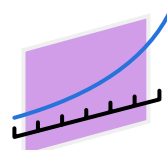
## High-volume printing made easy

Ensure print operations can handle high-volume workloads with minimal error or print only what you need to reduce waste.



## Deliver personalized services

Interactive and tailored communications are available anytime, anywhere, and on any device.



## Save time and money

Financial firms can cut costs and time knowing that the hundreds of documents streaming through their facilities are accurately filed, processed, and organized.

# How OL<sup>®</sup> Connect works



## INFORMATION INPUT

Automatically extract data from virtually any source or system—ERP, CRM, legacy systems, and PDFs



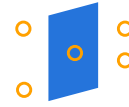
## DOCUMENT COMPOSITION

Repurpose existing documents or create new personalized content for print, email, web, and mobile—insert dynamic text, images, barcodes, and more



## ORGANIZE OUTPUT STREAM

Put some conditions and business logic into outputs—split, merge, group, and sort files



## DISTRIBUTION

Automate output using rules and conditions to control its final format and destination—web, email, printer, archive, and SMS



## INTERACTION

Use digital outputs to create new digital inputs and trigger follow-up processes based on recipients' behaviors

## Data and document input

Collect and manage data and print streams from virtually any source or system to populate documents and workflows.

## Document composition

Utilize data to create multi-channel communications, build personalized documents across systems, and enhance them using dynamic text, images, charts, barcodes, variable data, and more.

## Process automation

Automate workflows and integrate with existing and third-party applications. Easily trigger business processes and apply corporate standards and guidelines for creating, managing, and delivering communications.

## Multi-channel output management

Facilitate multi-channel output capabilities to distribute documents in print or digital formats including email, web, and mobile. Improve print production and simply manage post-processing and production workflows.

## Mobile data capture

Create and utilize interactive digital forms to collect, validate, and merge real-time data to systems from mobile devices. Automate workflows and follow-up actions such as billing or updates.

## Remote printing

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


## Integrations

Integrate with Enterprise Content Management (ECM) and Document Management systems (DMS), digital signature, and print production systems, and existing structures such as Enterprise Resource Planning (ERP), mainframe, and legacy systems.

SAMPLE

# Statement





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**Statement**

February 16, 2024

1 of 1

Statement Number: 748363

Account Number: 7482-7584-7238

Statement Period: 10-02-2024 to 11-03-2024


Reference: YZF-R1 (VN574839R3494) Lease

Gary Thompson


10 Main Road

Cityville, VI 23333

1



Did you know?  
E Bank insure can now insure  
your income, for only  
**\$25 a month!**  
Get peace of mind!




100% 100% 100% 100%

Due date February 28, 2024

Amount paid	Minimum amount require	Interest charges	Balance payable
300.00	\$45.00	\$26.00	\$1,946.00

We received a payment on January 21, 2024 - Thank you!

4



Date	Description	Type	Amount	Balance
10-02-2024	Lease Due	Lease	-\$310.00	-\$1,846.00
11-02-2024	Lease Repayment	Payment	\$310.00	-\$1,536.00
12-02-2024	Purchase	Purchase	-\$650.00	-\$2,186.00
12-02-2024	Service	Service	-\$350.00	-\$2,536.00
17-02-2024	Account Repayment	Payment	\$500.00	-\$2,036.00
23-02-2024	Purchase	Purchase	-\$50.00	-\$2,086.00
25-02-2024	Account Repayment	Payment	\$140.00	-\$1,946.00
27-02-2024	Lease Due	Lease	-\$310.00	-\$2,256.00
28-02-2024	Lease Repayment	Payment	\$310.00	-\$1,946.00


**Questions?**

To discuss your latest statement, you can contact your E Bank representative via email at [contact@ebank.com](mailto:contact@ebank.com) or give them a call on (210) 885-2599.

E Bank  
123 Main St.  
Townsville  
NS 40005

Fax 210-885-2475  
Phone 210-885-2598  
Email [Contact@ebank.com](mailto:Contact@ebank.com)

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Access to your account directly

## DIRECT MAIL



Gary Thompson

10 Main Road

Cityville, VI 23333



## EMAIL

February 16, 2024

Statement Number: 748363  
Account Number: 7482-7584-7238  
Statement Period: 10-02-2024 to 11-03-2024  
Reference: YZF-R1 (VN574839R3494) Lease

**Hi Gary,**

Your February Statement is now available.

if you have already paid your account please ignore this message,  
otherwise log in to your account  
Your statement is AVAILABLE, and can also be accessed online [here](#).

7



ACCESS TO MY ACCOUNT

**Questions?**

To discuss your latest statement, you can contact your E Bank representative  
via email at [contact@ebank.com](mailto:contact@ebank.com) or give them a call at (210) 885-2599.

E Bank  
123 Main St.  
Townsville  
NS 40005

Fax 210-885-2475  
Phone 210-885-2598  
Email [Contact@ebank.com](mailto:Contact@ebank.com)

- 1 Mailing address is utilized to send a statement.
- 2 Insert postal barcode to enable mail compliance.
- 3 OL Connect dynamically places variable data such as to, from, subject fields, account numbers, salutations, values, totals, and more.
- 4 Personalize information for each customer with dynamic elements such as images, text, graphs, charts, and promotional codes and offers.

- 5 Add folder inserter control marks to documents so production jobs can move directly from the printer to folder inserters.
- 6 Insert QR codes into the document design to direct clients to online resources, such as a payment gateway, to accelerate transactions.
- 7 Add interactive buttons and hyperlinks.

Schedule delivery: send out every month, week, day, or on-demand.

# Solutions

Leverage data across systems and documents and automate processes

## Document management

### Scenario

A large percentage of information available within financial institutions is often scattered across a variety of different systems and repositories, such as shared network drives, email, document management systems, and file-sharing applications. Duplication of content across many information silos is common, and businesses waste significant time searching for information. The lack of communication or visibility across multiple sources prevents data enrichment of related information stored in other locations. Inefficient manual processing and labor-intensive document handling heightens the risk of error.

### Challenges

- Inability to retrieve important information from multiple systems
- Higher printing costs from paper dependency
- Late payments and violations of business agreements caused by lost or incorrect documents
- Struggles with compliance due to resource shortages for oversight and monitoring

### Solution

OL Connect supports regulatory compliance and audit requirements. Switching between digital documents stored in the same application is quicker than shuffling through stacks or files of paper. Employees can simply map and integrate all data and automatically search and capture what is necessary. Financial firms can reduce paper and benefit from more efficient workflows with document retrieval right at their fingertips.



## Process automation

### Scenario

The shift from paper-based to electronic systems originally gave way to new, streamlined processes where data could be easily shared and stored. Now, departments such as accounts payable are pivoting to managing the influx of data, collaborating effectively, prioritizing time spent on projects and, as a result, maximizing efficiency.

### Challenges

- Many companies struggle to understand internal procedures for document processing
- Headquarters and field offices may not implement uniform workflows
- Coordinating the IT, business, and marketing teams can be challenging when business communications are siloed

### Solution

OL Connect automates processes and integrates with existing and third-party applications and systems. Trigger business processes with ease and apply corporate standards and guidelines for creating, processing, and delivering communications. Businesses can simply configure their own rules to automate any task such as archiving a document, making a copy on a remote server, or sending group email confirmations.



# Solutions

Enhance document creation, ensure security, and drive customer interactions

## Interactive and multi-channel communications

### Scenario

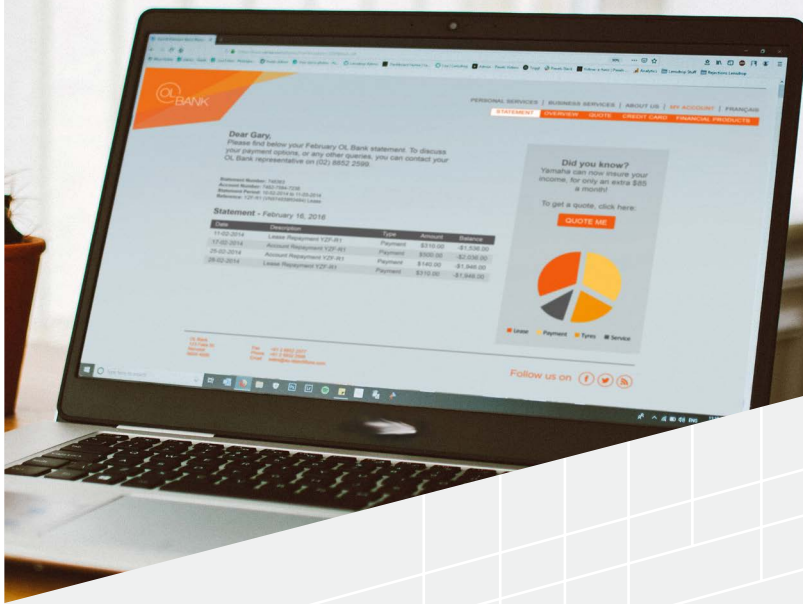
Financial firms are seeking ways to send personalized and interactive multi-channel customer correspondence with compelling offers, and true self-service convenience. However, many businesses produce a high volume of correspondence daily and implementing an effective solution is difficult.

### Challenges

- Reduced engagement and loyalty rates
- Heavy postal costs, high risk of data-entry errors, and compliance issues
- Costly system integrations and resource shortages
- Collecting data and documents across multiple systems and sources

### Solution

OL Connect liberates companies from inflexible IT systems and releases data from the systems keeping them hostage. By unlocking and integrating data, businesses can effectively create, personalize, and automatically deliver communications via multiple outputs. Intelligent customer communication tools enable custom billing, hyperlinks, action buttons, as well as interactive graphs and charts that allow customers to analyze information through their preferred delivery channel. OL Connect interacts with the existing environment to deliver a cost-effective communications system that is secure and user-friendly.



## Security and regulatory compliance

### Scenario

Financial institutions today are increasingly sharing a wealth of information to their service providers for document composition, printing, and posting. The movement of raw data to external parties creates the potential for new security data breaches, especially at a time where stricter compliance regulations have been imposed. Banking and financial firms need to secure the storage, transit, and use of corporate and personal data across business applications.

### Challenges

- Prevent security breaches and financial loss
- Ensure customer privacy and security
- Manage and process raw data scattered in various systems
- Arduous print and delivery processes

### Solution

OL Connect enables financial institutions to transition to a streamlined data management system where data can be captured, processed, delivered, and stored from various systems and sources. By maintaining an efficient data management infrastructure, confidential information can be managed in-house, eliminating the extra cost of third-party processing. OL Connect reduces security risk, facilitates compliance, and improves efficiency.

# Success story

## International bank

An international bank with branches across 30 different countries engaged us to help eliminate the manual handling and sorting of documents and to improve document integrity by switching to automated processes. The bank's vision was to seamlessly capture data in its host IT system and to send personalized statements to customers.



## Solution

OL Connect created a closed internal communication process to meet the bank's security requirements and accurately capture, design, and distribute the statements, with appropriate barcodes appended. This significantly reduced the bank's postage costs.

The new system is more efficient and has increased staff productivity.

# Success story

## Insurance company

One of the largest insurance companies wanted a document management solution that would streamline the processes of extracting and entering customer data and placing it in the correct core business system.



## Solution

By using OL Connect, the company automated this process and reduced the risk of error. It also improved the customer experience by refreshing the look of policy documents and providing readers with the option to reformat the documents into an easy-to-read booklet format.





Upland Objectif Lune helps companies automate business communications processes with its digital transformation solutions. With OL Connect technology, customers can create, manage, distribute, and automate transactional and promotional documents while solving the challenge of integrating systems.

## Ready to get things done?

Schedule a demo to see what OL Connect can do.

[Request a Demo](#)



[uplandsoftware.com/objectiflune](https://uplandsoftware.com/objectiflune)