

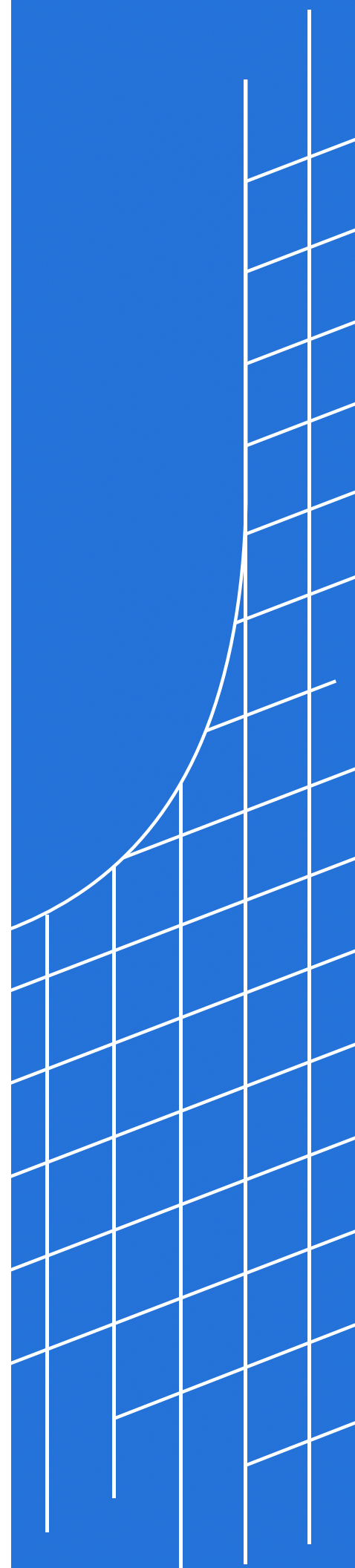
# OL<sup>®</sup> Connect

Document Composition and Automation  
Software for Manufacturing



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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.

### Digital transformation for manufacturers

Many manufacturing organizations still rely on outdated systems and manage everyday tasks manually. To remain competitive, these businesses must adapt quickly and implement smarter internal processes and automation.

It's time for manufacturing companies and their workforce to adopt a new mindset as technology evolves. Businesses can benefit from improved communication, team collaboration, increased efficiency, and faster order and invoice processing.

With automated solutions and systems, organizations can significantly improve their day-to-day operations to enable better business decision-making, enhance quality control, create cost savings, and deliver a consistent product. Moreover, manufacturers can increase R&D investments, allowing them to remain profitable by providing new products and services while competing with other companies. Adopting digital transformation and automation is essential for the future success of manufacturing businesses.



**67%**

of manufacturing CIOs  
prioritize improving  
operating models and  
investing in digital  
transformation.

\* Source: Gartner manufacturing industry 2024

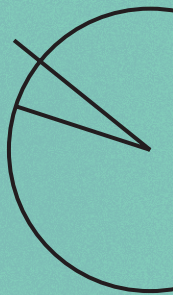


# Gain control over business-critical documents with OL<sup>®</sup> Connect



**55%**

of manufacturers reported measurable improvements in quality and productivity with digital transformation\*



## Business drivers

Boost productivity and ensure compliance with contractual and regulatory obligations

Eliminate significant impacts on business performance and customer service due to lack of visibility and supply chain disruption

Accelerate the adoption of automation to sustain profitability and gain competitive advantage

OL Connect provides the manufacturing industry with an optimized solution to enable real-time visibility of orders and production. OL Connect enables businesses to automate document workflows, reduce errors, and eliminate manual intervention in managing and tracking orders.

By implementing OL Connect, companies can ensure speed of delivery by quickly tracking, retrieving, revising, and archiving documents to improve customer service. Employees can also track and report product progression during manufacturing by accessing a web dashboard that provides real-time status updates to expedite order fulfillment.

OL Connect's powerful digital tools allow manufacturing businesses to securely handle, route, and store transactional documents to Electronic Document Management (EDM) and archiving systems.

Organizations can extend OL Connect's abilities with Capture OnTheGo, an innovative mobile form application that allows field workers to capture real-time data on mobile devices.

It is critical for manufacturers to integrate digital technologies into transactional document handling. Applying new digital tools and processes helps companies ensure future business success as operations become more scalable and agile.

\* Source: ARC Global Analysis 2023

# Advance operations and work smarter

Streamline workflows to enhance efficiency, minimize costs, and reduce time to market.



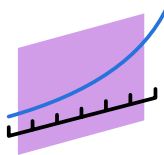
## Accelerate and simplify processes

Banish manual tasks and paper-based systems, automate workflows to free up resources, eliminate issues associated with misplaced or lost documents, and get to market faster.



## Expand visibility and control

Easily view and manage order and fulfillment statuses, allow user permissions, and add reporting on a unified platform to expedite transactions.



## Boost performance and revenue

Facilitate easy information retrieval, certify accuracy, comply with industry standards, lower administration overhead, and increase efficiency. Apply productive supply chain procedures to speed up order completion and shorten the order-to-cash cycle.



## Improve customer service

Enable fast order fulfillment and client response times and deliver personalized multi-channel communication to provide superior customer service.

# How OL<sup>®</sup> Connect works



## INFORMATION INPUT

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



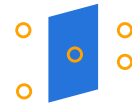
## DOCUMENT COMPOSITION

Repurpose your 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 logic into your outputs—split, merge, group, and sort files



## DISTRIBUTION

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



## INTERACTION

Use your digital output 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.

## 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.

## 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.

## 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.

# Transpromotional invoice

- 1 OL Connect dynamically places variable data such as to, from, CC, subject fields, salutations, account numbers, invoice totals, and more.
- 2 Insert company information to assist customers in getting in touch for support or inquiries.
- 3 Personalize information for each customer with dynamic elements such as images, text, graphs, charts, and promotional codes and offers.
- 4 Schedule delivery: send out every month, week, day, or on-demand.

# Document and data management

Unlock better management and insight with innovative systems.

## Scenario

Manufacturing organizations are constantly pressured to meet customer, market, and regulatory demands to sustain profitability and achieve a competitive advantage. With rising costs, evolving supplier and client expectations, and a lack of visibility over valuable data, these businesses increasingly turn to digital technology to simplify their decision-making processes, whether in production, warehousing, or delivery procedures. Manufacturers must prioritize adopting data and document management solutions to improve accessibility, usability, and efficiency.

## Challenges

- Processing delays due to paper dependency and lost or damaged documents
- Rising costs around printing and faxing equipment, consumables, and physical document archiving
- Employee frustration due to inaccessibility of essential information to accelerate order fulfillment and customer service response times

## Solution

OL Connect transforms inefficient paper-based systems into agile workflows by automating business-critical processes. Automated data extraction from multiple sources and documents eliminates the need to manually aggregate data and combine documents, allowing prompt and precise customer and supplier correspondence. Print projects are automatically sent to the correct digital archive within the company's Document Management System (DMS), which ensures every transactional document is accurately indexed for easy access and retrieval. With OL Connect, manufacturing firms can free up time and resources by significantly decreasing time spent looking for information, allowing their workforce to focus on more valuable tasks.





## SOLUTIONS

# Process automation

Simplify workflows and certify accuracy for transactional document handling.

### Scenario

Advances in digital technology and fluctuating internal and external collaboration drive manufacturers to invest in innovative solutions to increase operational efficiency. Automating critical document processes that are currently manual is the key to optimizing daily operations and producing tangible business outcomes.

### Challenges

- Streamlining the exchange of information to create and manage documents as a result of rigid and legacy systems
- Enhancing strategic decision-making due to non-existent or low visibility into internal production systems
- Improving productivity, ensuring accuracy, and expediting response times due to inefficient and error-prone manual handling

### Solution

OL Connect bridges the gap between siloed systems, including ERP and LOBs, to enhance functionality and implement smarter document and operational processes. Manufacturers can build and manage customized workflows to extract data from these systems to produce, process, deliver, and digitally archive correspondence. With OL Connect, documents belonging to the same transaction can be matched with identifiers to enhance internal and outbound communications.

The ability to optimize printing procedures and trigger automated workflows and approvals in OL Connect eliminates manual handling and allows workforce reallocation to more essential tasks. Employees can also quickly consolidate and schedule one-offs and batch printing projects such as labels or product information and add control marks to maximize post-processing efficiency while minimizing operational costs.



Reduce  
**operational  
overhead**  
and expedite  
order fulfillment



## SOLUTIONS

# Interactive and multi-channel communications

Adopt digital transformation to elevate business relationships.

### Scenario

Manufacturing firms must prioritize customers, suppliers, and workforce experiences to amplify business performance. However, ineffective processes often strain the interactions of both internal and external parties. Manufacturers must seek new avenues to advance their internal processes and enhance their relationships. This begins with implementing modern technologies to enrich communications and strengthen collaboration.

### Challenges

- Eliminating bottlenecks and information loss due to labor-intensive and inaccurate handling of large volumes of Word-based templates, including invoices, general correspondence, packing, and delivery slips
- Phasing out communication silos between departments that adversely impact effective operations
- Enhancing the customer experience, improving communications, and expediting response times

### Solution

OL Connect helps manufacturing companies integrate digital communications and workflows, leading to better customer and supplier experiences and improved internal collaboration. By removing communication silos between departments, offices, and field workers, businesses can streamline their internal processes. With OL Connect, organizations can easily share documents and data across departments, enabling staff to quickly respond to delays and exceptions. OL Connect provides real-time visibility, tracking, and reporting on progression and product delivery workflows via a web-based dashboard.

Employees can deliver transactional communications based on the recipient's preferences, including print, email, or web, to enrich client and supplier interactions. By leveraging OL Connect's automation and digital abilities, manufacturing firms can significantly enhance critical functions such as accounts receivable, improve communications and accuracy, expedite response times, deliver superior customer service, and shorten the order-to-cash cycle.



Improve  
**customer  
satisfaction**  
and business  
communications

## SOLUTIONS

# Data security and compliance

Ensure security and compliance with industry mandates.

### Scenario

Regulatory compliance is one vital parameter manufacturers must consider when conducting business. Organizations need to adhere to various industry standards, including quality control, security, and sustainability, which shape how businesses manage and adapt operations. Transitioning to digitized and automated processes enables manufacturing firms to comply with regulations and mandates to achieve greater resilience in a constantly evolving market.

### Solution

OL Connect encompasses robust document composition features that allow employees to modify templates on demand using a controlled and user-friendly editing experience. Workers are easily able to make modifications to labels, product and logistic documentation, and various business correspondence. With a dependable digital archiving system, companies can securely store and manage transactional data and documents such as invoices, proof of delivery slips, purchase orders, contracts, and activity reports. OL Connect significantly reduces paper processes and certifies compliance with regulatory mandates.

### Challenges

- Implementing secure document management and record-keeping processes while relying on paper-based systems that can easily be misplaced or lost
- Achieving corporate sustainability goals due to high paper dependency in daily operations
- Ensuring compliance with audit regulations and standards hindered by unreliable Word processing systems used to create countless templates



## Document mobility

Access documents without paper and capture real-time data in the field.

### Scenario

Manufacturing and distribution companies face several challenges, including rising costs, higher expectations of speed, and widespread inefficiency. New technologies are a catalyst for many positive changes and can help overcome these challenges. Digitization streamlines how employees in manufacturing companies enter, access, and share data, resulting in improved business processes at reduced costs.

### Challenges

- High costs associated with maintaining paper, printers, fax machines, toners, etc.
- Paper documents are easily lost and damaged, causing delays in processing
- Employee frustration due to inaccessibility of real-time and accurate information to accelerate order fulfillment and customer service response times

### Solution

Capture OnTheGo, powered by OL Connect, is a mobile forms solution that replaces manual, error-prone, paper-based processes and converts them to digital forms accessible anytime, anywhere through a mobile device. With the mobile forms solution, workers in the field can manage, send, and access transactional documents securely and confidently, ensuring all data is automated to the appropriate system.

Manufacturers can now go completely paperless with transactional documents. This includes documents requiring signatures, markups, and approvals, such as delivery notes, purchase orders, packing lists, purchase invoices, and more.



**Gain  
mobile  
workforce  
automation**



## SUCCESS STORY

# Global appliance company

### Challenges

An international appliance manufacturing company faced challenges managing print requests from its 40 global locations. Each location used different print technologies for their production lines, making it difficult to standardize print layouts across all plants. The business needed a solution that combined print layouts for all production plants while allowing individual facilities to modify outputs as necessary. They also wanted to centralize document composition and automation for better efficiency and control.

#### Document types

- Technical product labels
- Packing labels
- Wiring diagrams
- Statements of conformity

### How they did it

The manufacturing firm successfully integrated its existing document management software with OL Connect, which enables the business to extract data and quickly generate custom print-ready documents.

- Automatically distributes the documents to various printers in the correct formats based on business logic
- Workers can easily handle local errors, as print operations can be migrated to other printers instead of being stopped following any issues
- Consolidates and streamlines print production routines
- Provides the flexibility to control multi-channel output for all the production plants

### Results

- Substantially reduced human error and printing costs through automation
- Centrally managed document composition and retained brand identity
- Minimized operational overhead and waste through optimized printing processes
- Increased productivity and unified all plant operations



## SUCCESS STORY

# Building products company

### Challenges

A large regional manufacturing company faced significant challenges with a business system providing only print output and limited document design. Their legacy system was managed through a rigid and cumbersome plug-in for a restrictive graphic design software, which was inadequate for high-volume print production projects and lacked the necessary control for crucial business processes. The manufacturer struggled with manual and labor-intensive paper-based order retrieval and document archiving processes, leading to production delays, overtaxed customer support agents, and slower turnaround times. These bottlenecks had a detrimental impact on the customer experience, order fulfillment, and overall revenue.

#### Document types

- Invoices
- Purchase orders
- Pick tickets
- Work order tickets
- Delivery notes

### How they did it

The manufacturing company replaced its document design application with OL Connect to increase flexibility and streamline most paper-based processes.

- Provides the ability to easily collect data, select templates, and apply business rules to generate documents
- Allows employees to quickly update, produce, and deliver easy-to-read invoices and correspondence
- Manages print and digital output through intelligent business logic and simplifies workflows
- Instantaneously archives all related documentation in the DMS

### Results

- Optimized operations by significantly reducing paper usage in the manufacturing process
- Increased employee productivity and lowered labor costs associated with manual archiving
- Achieved brand integrity by consistently providing professional on-brand company templates and managed forms
- Enhanced customer satisfaction through efficient document retrieval and quick dispute resolution via digital archiving
- Accelerated order fulfillment and the order-to-cash cycle with e-invoicing capabilities



## SUCCESS STORY

# Stone and tile company

### Challenges

A large stone and tile manufacturer in the United States and Canada faced challenges managing daily transactions for over 300 stores due to complex paper-based processes. The business struggled with high storage costs and bottlenecks in transporting and storing large volumes of paper documents off site for audit and proof-of-delivery purposes. The company was also strained with delayed orders, manual and error-prone procedures, and difficulty finding documents needed for compliance audits. To overcome these difficulties, they sought a digital platform to improve visibility and streamline their work practices.

#### Document types

- Sales slips
- Bills of lading
- Credit notes
- Reconciliation reports

### How they did it

The tile company implemented OL Connect and Capture OnTheGo in their wholesale stores for all customer-facing transactions. More than 1,000 employees use the solution to perform deliveries and product signoffs.

- Creates mobile interactive forms available to drivers who can accurately capture a wide range of information in the field
- Each proof of delivery is automatically sent back to the system in real time to trigger additional processes such as invoicing or document archiving
- Digital archive copies are retrieved as needed from the Document Management System

### Results

- Removed paper for transactions and delivery processes to streamline and accelerate workflows and cut storage overhead
- Documents are processed digitally, each taking less than two seconds, allowing 50,000 to be completed daily
- Eliminated errors associated with order paperwork getting misplaced or lost
- Freed up store resources, enabling employees to improve customer service
- Simplified document search and retrieval for audit requirements





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)