Expresso Dictionary

Expresso ®

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Contents

Products

Expresso   Cloud-based customer communications management platform that provides clients with complete control over preparing, modifying and distributing electronic and mailed communications.

ExpressoVote   Cloud-based annual meeting/election management. Print and mail, and digital notifications, email reminders, online and paper ballot voting, automated vote tabulation and third-party election certification.

ExpressoPay   Cloud-based online and phone-based digital payments application delivering electronic bill presentment and digital payment collection via credit, debit, and ACH.

ExpressoCertified   Cloud-based automated Certified Mail option for sending sensitive documents with electronic return receipt delivery via USPS confirmation and recipient signature.

Digital Engagement Providing Opt-in, e-delivery and SMS/text for your communications.

File Import and Data Processing

Parser   Custom import program that prepares client data for processing. The parser usually includes logic for data validation, scanline creation, and field formatting for the Expresso workflow.

Validation Rules   Criteria used to validate the data file or data fields during import. These are contained in the parser.

CASS   Coding Accuracy Support System is first set of criteria used for the three-step address verification and standardization process. During CASS an address is compared against a valid range of addresses assigned to a street by the United States Postal Service. If the address is found within the street range of addresses, it is flagged as Valid. If the address is not found within the range, it is assigned Return Code 21. Return Code 21 and additional non-deliverable address return codes may be set to reject in Expresso. Daily CASS reports are posted to the Nordis ftp site.

DPV   Delivery Point Validation is the second set of criteria used for the three-step address verification and standardization process. The address is compared against the DPV database of valid delivery points. The address may exist within the street range, but the actual address may not exist. If the Delivery Point is not found, the address is assigned a return code of 0 (zero).

NCOA   National Change of Address is the third set of criteria used for the three-step address verification and standardization process. The NCOA database is maintained by the United States Postal Service. NCOA confirms if an Individual, Family or Business has moved within the last 18 or 48 months. NCOA will return an address change, to which Nordis will mail the document. Daily NCOA reports are posted to the Nordis ftp site.

Field Alias   The name of the data field imported from the client file.

Reject   Any record that is omitted from the print/mail fulfillment process. Rejects may be client defined, a result of address verification failure, or a result of processing errors.

Document Creation

Document   The framework for a communication that defines the layout (zones) and print attributes (letterhead, size, simplex or duplex). Each document is linked to a template behind the scenes.

Zones   Specifically positioned and sized placeholders for content. Similar to text boxes in MSWord.

Content   The text, merged with data and/or images that will print on the document. Content placement is limited to the zones on the document.

Simplex   Single sided print.

Duplex   Double sided print.

Mixed-plex   A mix of simplex and duplex printed documents.

Pdf Upload   An Expresso Document that is configured to allow users to transfer a generic (non-personalized) pdf document into the mailing package. The pdf upload is used when you want to include a notice or letter that is not addressed and does not contain any fields from the data file.

Content

Content   The text, merged with data and/or images and rules, that will print on the document. Content placement is limited to the zones on the document.

Custom Table   A collection of variables used in the document that are not provided in the client's data file. The tables link to a defined 'Primary Key' which is typically a field in the data file.
Custom tables are editable in the Expresso UI.

Rules   Programmed logic that controls the use of the variables from the Custom Tables; or logic that applies decision points to data or document inclusion.

Fields   The data fields provided in the client data file that are imported via the parser.

Content Editor   The Expresso UI that provides access to create, edit, and delete content.

Mailing Package

Package   Everything that is mailed including the mailing envelope.
- One or more documents
- Additional components (envelopes, buckslips)

   If the documents are delivered electronically, the document(s) from the package will be available via a link in the outgoing email.

Envelope   The mailing envelope

Insert   Any item not printed on the printer (BRE, CRE, buckslip) that is inserted into the mailing envelop and with the primary documents in the package.

Buckslip   An insert added to the mailing package typically sized 8.5 x 3.5. These are typically off-set print using glossy paper.

Offset Print   An item printed by a print vendor and received at Nordis to be used as an 'insert' for the mailing package. An example is color letterhead or a buckslip.

Email

Version   The defined arrangement of the information (layout) which populates the email. One email version may be used for multiple delivery categories. (An Email template does not exist in Expresso)

HTML   Client supplied HTML code used as the base for the email. Nordis will add any required data fields, images, 'pieces of content,' and rules.

Responsive HTML   Client supplied HTML code used as the base for the email that includes proper HTML tags to control display attributes for multiple platforms(PC, Tablet, Phone).

   Nordis will add any required data fields, images, 'pieces of content,' and rules.

Text Messaging

Sender Code	This is the actual sender number that the recipient of a Text Message will see on their cell phone. There are two different types of sender codes, ShortCode and LongCode. ShortCode is a 5- or 6-digit number, more expensive than a LongCode, and has a higher delivery throughput than a LongCode. LongCode is longer number, with a lower delivery priority. A Program can use as many Sender Codes as available to the program.
Keyword	A way to identify a type of text communication from another. This will be mostly useful when a customer chooses to opt-out, if the recipient responds STOP + keyword, the system will know that customer only wanted to opt-out for that keyword, not the whole SenderCode.
Text Message Version	This is where Expresso users configure the attributes & content of the Text Message. This is where the SenderCode, Keyword, & Split are associated to the Text Message version.

Mail Types

USPS Presort	USPS Presort provides a discount for customers who sort their mail before sending it off to USPS, and it requires a 500-piece minimum. Presort is also referred to as automated mail.
USPS Full Rate	USPS Full Rate is First class, non-automated mail. This type of mail receives no discount.
USPS Standard	Standard mail is automated mail used if the mailing is less than 200 pieces. It is a lower postage rate.
Co-Mingled	Mail from multiple sources is mixed together and presorted by a third-party vendor to achieve a lower postage rate. If mail is co-mingled, the 500 piece and 200-piece minimums do not apply.
Certified	Allows for tracking via USPS and includes proof of delivery storage for years. Electronic delivery confirmation is available via USPS.
Registered Mail	Registered mail is a mail service offered by postal services in many countries, which allows the sender proof of mailing for an international record providing electronic verification that an article was delivered or that a delivery attempt was made.

Print and Mail Fulfillment

Print Job   The final merge of data, rules, document(s) and mail settings for one or more data files processed through Expresso. The end result is the print file and mail tags.

Print File   The document file configured to print on the Nordis printer.

Run Sheet   The print order ticket that is generated for each print job. The run sheet includes the print instructions, inventory, postage and mail type information.

Split   Subsets of the print file grouped by fulfillment characteristics (different sized paper; a subset of records gets a buckslip inserted, a subset of records uses a different mailing envelope).

Inventory   The materials used to create the mail piece: envelopes, paper, inserts, etc.

Appendix A – Best Practices

Data
Below is a list of Best Practices to ensure data security and streamlined Expresso program management/processing.

- Do not send personal identifying information in your records (e.g., SSN, DOB, MRN, credit card)
- Use the Nordis provided SFTP to transfer files
- Develop automated file creation for posting to the SFTP
- Provide test file(s) with at least 500 records
- Provide use cases for all possible scenarios
- Standardize your communications to minimize variations

Email - Tips to Avoid Spam Filters

1. Always include a 'from' address. Emails from unknown senders are immediately reported as spam.
2. Always include your physical mailing address and a phone number in the emails.
3. Keep your email size under 30kb. Avoid unnecessary text and images.
4. Provide an unsubscribe link within the email such that it is prominently visible to the recipient. This will help you avoid spam labeling.
5. Don't use all caps anywhere in your email or its subject line.
6. Don't use exclamation points!!!!!
7. Don't embed forms in your emails.
8. Don't include attachments to your emails.
9. Don't use spam trigger words. This URL has an extensive list https://blog.hubspot.com/blog/tabid/6307/bid/30684/The-Ultimate-List-of-Email-SPAM-Trigger-Words.aspx#sm.0000o5c3iom8gdkipdw2l236rj19q
10. Don't use a red font when drafting your emails.
11. Don't jam pack your email copy with keywords.
12. Don't use an overwhelming number of images, or huge images.
13. Honor unsubscribes.
14. Do use a familiar sender name.
15. Only send emails to individuals who have opted in to receive them.

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