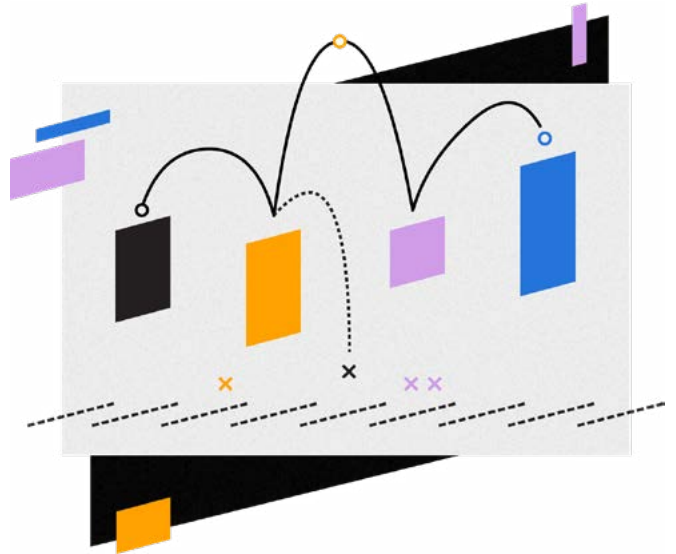


Work smarter with FileBound Connect for intuitive content delivery

Close the gap between information found in ERPs, CRMs, accounting systems, and more. Anticipate and automatically deliver relevant content so you can get work done more quickly from one place.



Seamlessly integrate with everyday applications.

You bounce between many systems every day. What if the content you need popped up right where you're working, automatically?

- Connect works with third-party business applications to anticipate content that complements the application you're working in and deliver it right to your fingertips
- Perform daily tasks from one simple user interface instead of disparate systems
- Out-of-the-box integration makes user adoption fast and easy



Provide instant access to business-critical content.

Connect sites in the corner of your screen waiting to alert you when relevant content is available.

- No coding needed—simply drag and drop content into a file, customize folders, and provide access to anyone in the organization
- Provide instant notifications for assignments and give staff one-click access to view and approve new content
- Utilize built-in controls and provide a full audit trail for all content to facilitate regulatory compliance and mitigate risk

Eliminate tedious content searches by automatically getting the info you need.

Our clean design and out-of-the-box integrations transform the way users connect to line-of-business applications.

Document and records management

- Quickly import content from other systems using Office add-ins, drag-and-drop, web forms, or from a Word document template
- Instantly notify users of content and assignments relevant to their role or project
- Create customizable folder structures based on the user's profile, then import relevant information automatically
- Easily drag-and-drop content directly into a destination folder from your desktop or any application—no custom coding needed
- Send emails directly from FileBound with files as attachments
- Provide auditors with thorough versioning records reporting for retention

View, annotate, and preserve

- All digital text, even from image files, becomes part of your searchable database
- Automatically extract content with superior accuracy using Optical Character Recognition (OCR) functionality
- Full annotation set: shapes, sticky notes, stamps, highlights, text, and redaction controls can permanently become part of an image file
- Redact entire sections or a single word in documents
- Ensure access to the most up-to-date information and provide a complete history of changes with version control
- Electronic signatures validate against a secure server—choice of text stamps or image-based signatures

Integrations

- Easily integrate with the most popular applications including Microsoft Dynamics, HRPyramid, Excel, Outlook, and even web applications like Salesforce.

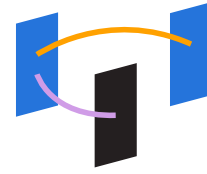
Security and compliance

- Facilitate federal and state regulatory compliance and mitigate business and legal risk
- Create granular user and group permission controls to make sensitive information accessible only by authorized personnel

Just get more done

- Find and view documents, drag documents from your computer straight into files, and create new files all from within Connect
- Improve efficiency, reduce project turnarounds, and eliminate bottlenecks by giving employees instant access to relevant content and action





Complementary products

Pair Upland FileBound with other Document Workflow products for a secure, automated end-to-end solution.

-  **BA Insight**
-  **Intelligent Capture**
-  **AccuRoute**
-  **InterFAX**



Upland's expert team will help you define the right strategic approach for your digital transformation needs and ensure our technology aligns with your goals, resources, and processes.



Ready to get things done?

Let us show you what Upland FileBound can do.

[Request a Demo](#)

Upland FileBound delivers document and workflow automation applications that improve the operation of any organization by connecting users with the information they need to work more efficiently and effectively. With FileBound, customers can build automated workflow processes and centrally manage documents to improve compliance, collaboration, and access to information.

