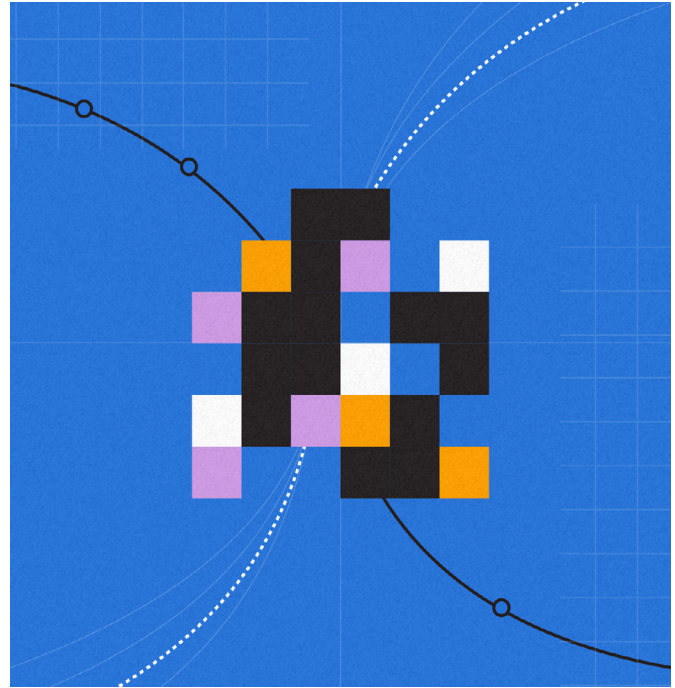


# Electronic forms make work easier

Create forms quickly with our no-code forms designer or automatically transform existing PDFs into electronic forms to grab business-critical content faster.



**Improve business interactions by making content submission as easy as "send."**



## Say goodbye to pesky paperwork.

Upgrade from paper to online forms created using drag-and-drop design tools to compile relevant data effortlessly.

- Automatically autopopulate numeric fields, data, text, and more directly into the form and route directly to workflows or applications
- Save time spent handling paper forms or trying to manually track requests via email
- Eliminate the risk of forms being misplaced, overlooked, or incomplete



## Create a better customer experience in the cloud.

Improve service and convenience by creating an external portal that is securely accessible 24/7 via a direct web link.

- Enable multiple forms in one view based on the audience
- Allow users to effortlessly attach supplementary information or documents
- Include eSignature capabilities to securely capture sign-offs and speed up turnaround

# Quickly create eForms without code

No headaches here! Creating and modifying electronic forms with ease is the name of the game.

## Create

- Use drag-and-drop configuration tools to quickly create and customize forms to share with internal or external users
- Start with basic templates and even modify them to create your own templates to enforce internal branding standards
- Advanced designers can create complex HTML forms
- Limit access to forms and ensure security using passwords or usage codes

## Convert

- Update outdated paper processes by easily converting existing PDFs to electronic forms
- Quickly create or modify form fields to ensure that every form is grabbing the content you need for specific processes
- Eliminate manual shuffling through paperwork with inaccurate or incomplete information



## Capture

- Gather information with less impact on staff by allowing users to complete the form and attach additional information such as supporting documents, insurance verification, records, and receipts
- Provide virtually anyone with the ability to submit forms and documentation anytime, anywhere, using any device they choose
- Easily capture legally binding eSignatures using a mouse or other signature capture device

## Route

- Upon submission, automatically route to workflows to autopopulate records and trigger next steps in the process
- Send forms to recipients, workflows, or line of business systems such as ERP, DMS or HIS systems based on preconfigured rules





# Electronic forms improve productivity across industries and departments

Whatever your focus, putting electronic forms into place enhances staff efficiency and improves user experience.

## Nonprofits

- Gather client information to enable faster service request times
- Reduce paperwork burden for smaller teams or departments
- Enable faster fundraising requests, volunteer applications, and more
- Securely store content to ensure audit-readiness and mission funding

## Education

- Fast-track student needs such as enrollment, financial aid, and transcripts
- Sync with student information systems (SIS) to add data to student files
- Streamline staffing needs such as hiring, reviews, PTO requests, and payroll
- Gather parent permissions and receive inbound alerts to ensure student safety or well-being



## Government

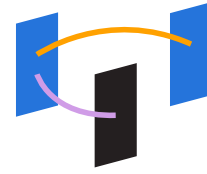
- Create online portals for utility payments, voter registrations, and more
- Allow for faster communications and data transmission between offices
- Ensure uninterrupted, anytime access to critical community services

## Human resources

- Simplify hiring with online applications and supporting data uploads
- Automatically route to workflows upon submission to autopopulate records and trigger next steps in the process
- Eliminate paper PTO requests, review documentation, and more
- Maintain complete employee profiles armed with action alerts

## Accounts payable

- Automate POs, expense reimbursements, or other accounting processes
- Enable faster turnaround time by providing secure eSignature approvals
- Create vendor self-service portals to easily submit documentation



## Complementary products

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

-  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.

