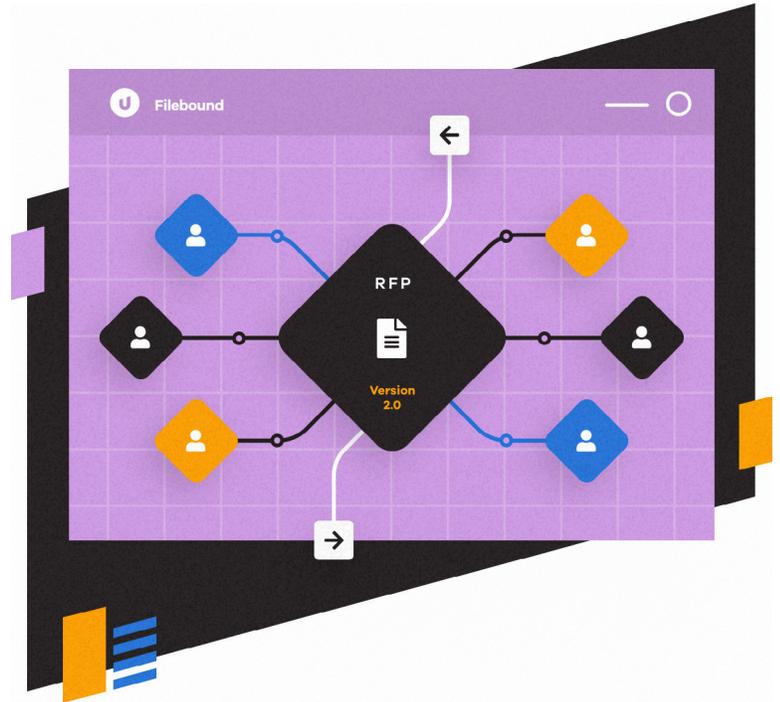


# Document management and workflow automation

Eliminate tedious tasks and build custom workflows that let teams easily create, route, review, process, and retrieve content.



**Automated document management inspires collaboration and helps you get more done**



## Straightforward workflow automation for everyone.

Drag-and-drop configuration lets you automate even the most intricate tasks, without the need for coding.

- Collect information from virtually any format: email, fax, paper documentation, forms, and more.
- Create dynamic rule sets to route data and trigger operations.



## Empower your diverse workforce via the cloud.

Make workflow seamless among on-site, virtual, and freelance teams across the globe.

- Access files, route documents for review and approval, create forms, collect eSignatures, see pending tasks, and assess project status and results from anywhere.
- Centralize multiple interfaces for indexing and distributing data for use in other applications.

# Empower business by automating work

Now your teams can collaborate to keep work flowing smoothly with access to the content they need, right at their fingertips.

## Workflow automation

- Customizable workflow rules
- Graphical drag-and-drop interface for no-code configuration
- Automatic importing, escalations, and scheduled event capabilities
- Minimal training needed for user adoption

## Document management

- Easy configuration for permissions and security settings
- One-click metadata searches for documents and files
- Digitize and store records securely in one place
- Highly scalable with flexible licensing options



## Electronic forms portal

- Capture and automatically route requests via workflow rules
- Replace outdated, error-prone paper forms and processes
- Provide 24/7 upload and submit capabilities

## Robust analytics

- Five Insights Dashboards evaluate process efficiency
- Predictive analytics recognize trends based on patterns
- Performance comparisons identify areas for improvement
- Anticipate the effects of current trends on future productivity

## Wide variety of integrations

- Integration platform powered by Dell Boomi
- Open APIs allow for custom integrations with existing systems
- Fused interface provides access to data from one screen
- Single Sign-On (SSO) integrated

# Flexible integrations get you all the content you need

Say goodbye to data silos with comprehensive integration platform and API capabilities that allow you to connect to common business systems

## CRM systems

- MS Dynamics
- Salesforce

## Human resources

- HRPyramid
- Skyward
- Ultipro

## Financial systems and ERPs

- Concur
- Intacct
- MS Dynamics Great Plains
- Abila MIP Accounting
- Microsoft Dynamics
- NetSuite
- QuickBooks

## Enterprise

- Dell Boomi
- Winform Fields
- HTML Extraction

## Student Information Systems (SIS)

- Skyward
- PowerSchool



*The implementation of FileBound has solved a lot of our challenges because we no longer have to search for paper. **Now we know exactly where documents are and can access them from anywhere.** FileBound has been so easy to work with.*

**Lisa Wagnon**  
Administrative Management, Volunteers of America Southeast Louisiana



**24/7** Access to managed documents and files

**1**

Number of days it takes nonprofit Stand Down to process financial assistance requests. It used to take weeks.

**15+**

Years our experts have been helping organizations

# Workflow automation for any enterprise

FileBound keeps work flowing smoothly across a variety of industries and job functions.

## Education

- Digitize student records and simplify resource requests
- Ensure data compliance with state and federal agencies

## Government

- Provide online forms submissions for utilities or community requests
- Securely share records and improve collaboration between government entities

## Human resources

- Simplify applications, onboarding, and employee review processes
- Easily maintain comprehensive employee profiles armed with action alerts



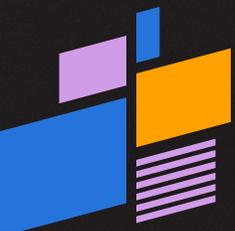
## Nonprofits

Focus on what matters – your clients and community. Automate the rest.

- Provide 24/7 online forms submission for financial and resource requests
- Reduce paperwork burden and ensure audit-readiness to secure funding

## Accounts payable

- Automate and accelerate purchase orders and invoicing while monitoring payment status in real-time from your dashboard
- Manage vendor selection, facilitate onboarding, and provide an online self-service portal to keep processes moving



## 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.

