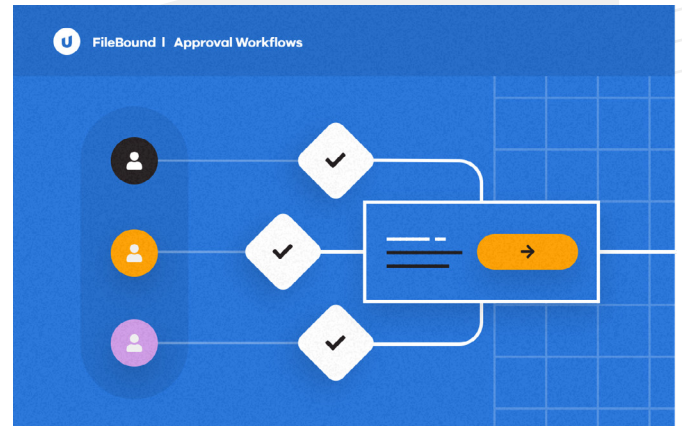**U FileBound**

Conquer records management with automation

Documents drive your business. Let us help you keep track of the whole shebang—from onboarding new hires to managing contracts to flawlessly maintaining records to support compliance or legal claims— all from one centralized dashboard.

FileBound | Approval Workflows

Software that takes the complexity out of records and compliance.

Make managing your documents easier.

Easily locate records, create rules for routing and retention, and secure them with permissioned administrator rights.

- Access systemwide information about content, users, projects and activities with a user-friendly, customizable dashboard view.

- Schedule automated alerts to approve destruction of records at end of their lifecycles to avoid potential liability.

Ensure audit-readiness and compliance.

Create retention rules and workflows to make sure all the right boxes are checked, every step of the way.

- Ensure all records meet internal and external requirements and provide proof that policies and procedures were followed.

- Provide a full audit trail and reporting on all records and associated actions to prove their validity and integrity to demonstrate compliance.

FileBound

Build it, customize it, and work faster

FileBound tackles records management by creating an end-to-end automated process that assembles information for access from one centralized interface.

Human Resources

- Create comprehensive personnel files to securely house all information

- Oversee the consistent use, access, and destruction of records as needed

- Ensure all records are retained according to internal and external compliance policies

Accounts Payable

- Integrate with ERP systems to standardize processes and provide secure access to data across locations

- Create comprehensive vendor files with complete documentation

- Easily scale to full business processing with FileBound Workflow Automation capabilities

Contracts Management

- Integrate with your CRM to easily access items such as NDAs, MSAs, or SOWs

- Access and review documents from any device, any time

- Ensure all the regulatory boxes are checked for compliance purposes

Compliance Audits

- Create actions so when records are ready for final disposition, they can be automatically destroyed or sent to a reviewer for approval

- Deliver reports on legal holds, record destruction, record declaration, and disposition approval, as well as standard FileBound reports that track actions involving records

- Leverage robust workflow capabilities to declare records and send notifications of record destruction

Harness automation to work smarter, not harder

Let the software do the heavy lifting by ensuring reliable and secure access to business-critical documents.
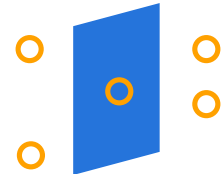
Improve response times

Improve the ability to respond fully and reliably to annual audits, legal action, and other requests that require tamper-proof evidence. Grant auditors temporary access to the system to streamline audits even further.

Eliminate manual errors

Reduce the likelihood of human error by automating classification, retention rules, and disposition. Set action alerts for tasks down the road. Eliminate manual work to give staff back time to work on more high-value tasks.

Minimize screen bouncing

Give your staff a better work experience and save them time by allowing them to manage all records in the familiar FileBound interface rather than flipping between multiple applications or systems.

As regulations and complexities continue to mount in our industry, we have to look at ways to ensure compliance, while reducing labor-hours associated with manual audits and processes. Upland allows us to do that.

Director of Human Resources
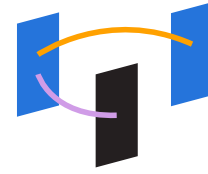U.S.-based Fruit Farming Company

Read full case study →

4,000
Seasonal workers onboarded in weeks

Only 1
person needed to oversee the hiring process thanks to automation

Complementary products

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

U **Intelligent Capture**

U **AccuRoute**

U **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.