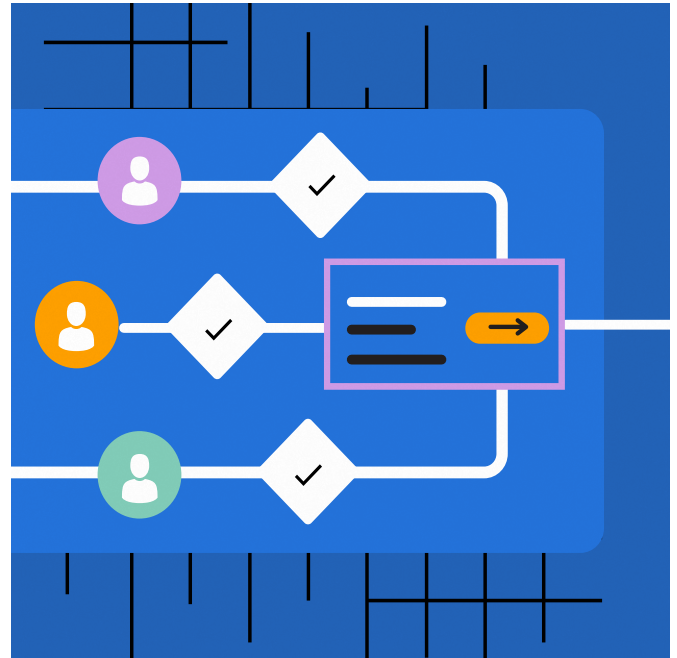**U FileBound**

Automate workflows to balance daily tasks

Eliminate manual work, banish approval bottlenecks, build project transparency, and focus your time on high-value tasks.

Use technology to increase control of processes and find ways to work smarter.

Build the workflows you need without coding.

Easily configure workflows for any task using a user-friendly, no-code interface.

- Build from templates or create customized workflows and easily update as needed

- A no-code experience means anyone can configure workflows using a drag-and-drop designer

- Add business rules or regulatory requirements to ensure compliance

Get the content you want more quickly.

Automate routing and approval processes so your staff can get what they need without dealing with tedious busywork.

- Automatically import and route content based on rule configurations

- Set up scheduled events and action alerts

- Customize your dashboard to monitor progress and review process analytics

Organize work and empower staff.

Don't get stuck on tedious tasks. Rely on technology to increase control of daily processes and uncover areas for improvement.

Automate approvals

- Electronically send documents such as applications, requests, and vendor invoices to anyone who needs to approve them according to business rules

- Harness automation to work at peak efficiency, eliminate bottlenecks, and give staff time to focus on the big picture instead of time-consuming menial tasks

Route documents

- Send to appropriate staff for review so they can quickly act on or respond to requests

- Batch send so requests can be approved one by one or simultaneously from any device

Eliminate tedium

- No more checklists, searching for missing documents, or validating data — FileBound takes care of the details

- Reduce missed opportunities and improve the customer experience by giving your staff the resources to complete important processes faster and with less effort

Enforce compliance

- Ensure compliance with business rules or regulatory requirements and provide documentation that all guidelines were followed

- Reduce the risk of human error resulting in lost, misplaced, or stalled documents by eliminating the need to route paper files or track confusing email threads

Just get more done

- Empower employees working from anywhere to easily and securely access information

- Increase business agility with user-friendly technology with fast adoption, reducing reliance on IT

- Plug and play using complementary features such as electronic forms and analytics to accelerate processes and avoid bottlenecks

Workflow automation solves universal needs across industries.

Whatever your focus, workflow automation enhances staff efficiency and improves user experience.

Nonprofits

- Quickly gather approvals and secure resources for client-related requests

- Eliminate the paperwork burden for smaller teams or departments

- Enable faster fundraising requests, volunteer applications, and more

- Track documents and actions 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
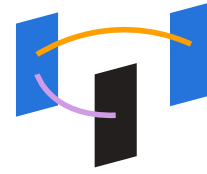
Government

- Create online portals for utility payments, voter registrations, requests, and more

- Allow for faster communication 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, and 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.

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.