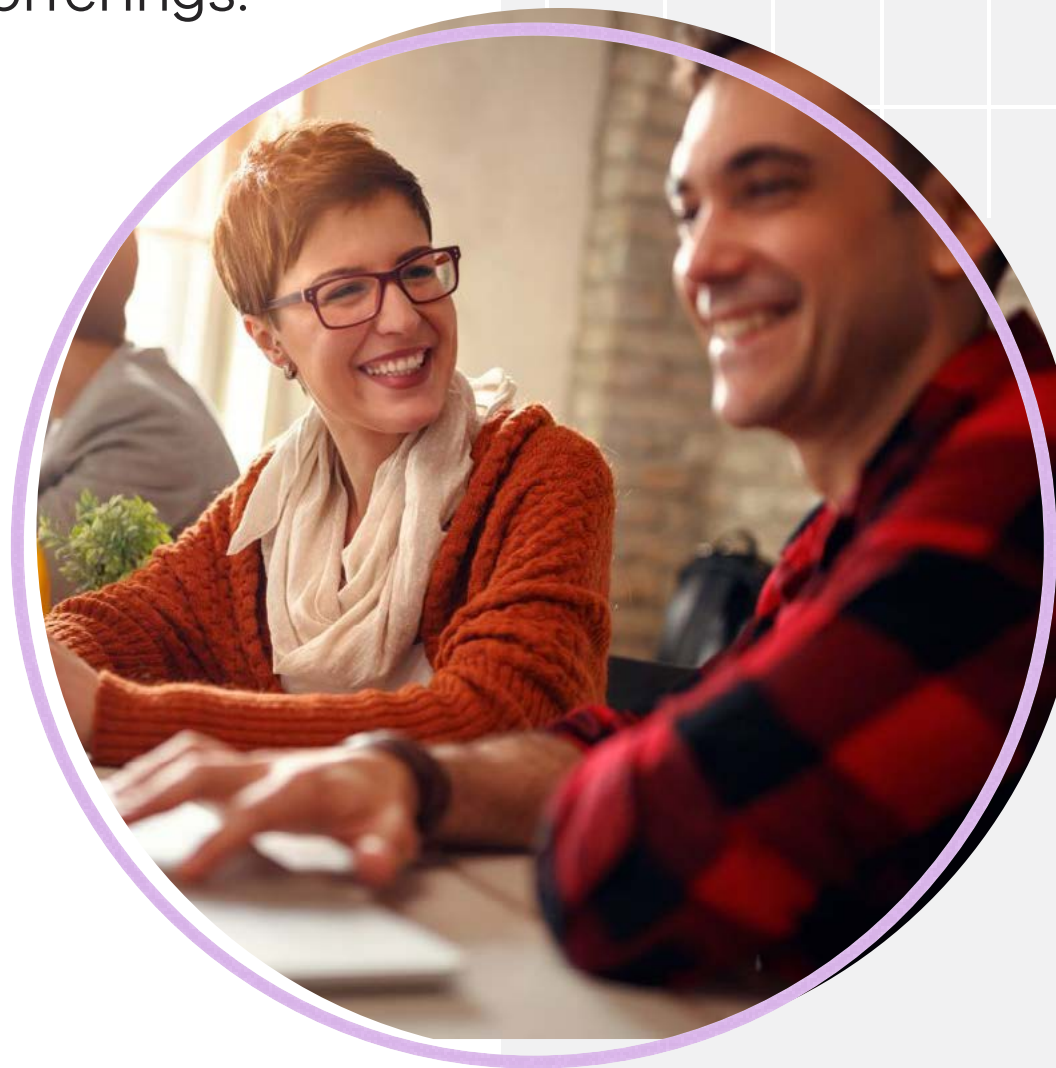


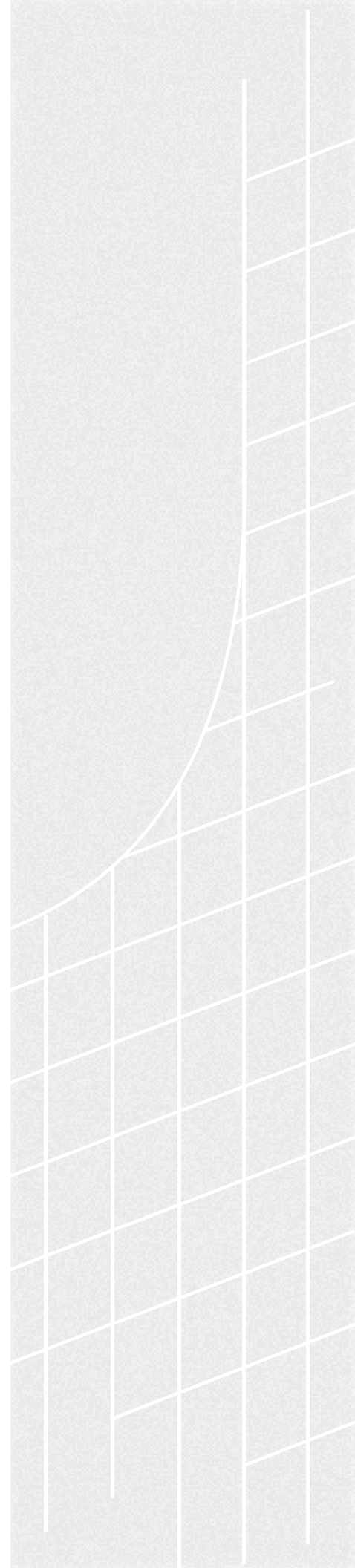
# Content Lifecycle Automation

Here's a closer look at our mission and our seven distinct product offerings.



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# Evolving Past “Going Digital”

## Drive value and deliver more

We simplify everyday work by transforming content-centric processes to make business more efficient.

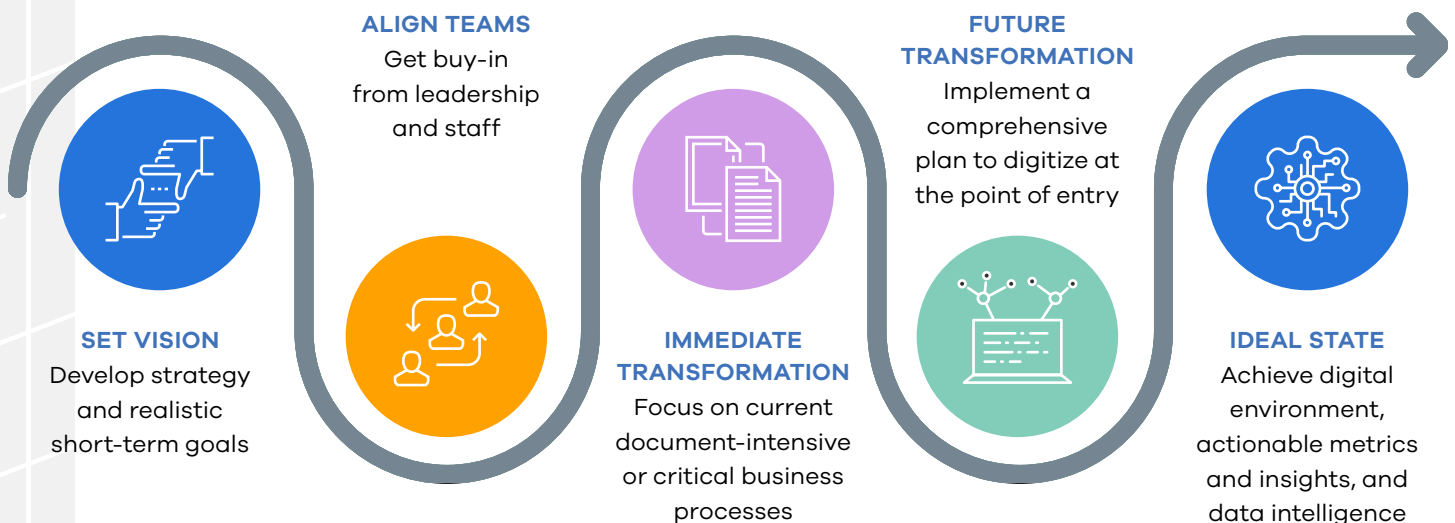
For organizations with digital data management and communications solutions already in place, daily work runs smoothly, customers benefit from fast, uninterrupted services, and staff have tools to succeed in a remote-hybrid business climate using existing systems. But some organizations are still struggling as they rely on legacy systems, outdated manual processes, or piecemeal digital transformation strategies that only encompass some processes while leaving others behind.

Digital transformation allows organizations to adapt to rapid market changes. But more than that, implementing digital strategies helps to improve operational efficiency, drive down costs, ensure accessibility to business processes, and improve data security. All these components are critical to help organizations thrive in this digital era of work, and a holistic approach is vital for success.

**It's time to move beyond “going digital” to actually becoming fully digital. At Upland Content Lifecycle Automation, we have the technology to help.** Upland empowers organizations with technology that enhances flexibility and bolsters security so they can meet any challenge.

We provide best-in-class technology to address the entire content lifecycle and make “being digital” a reality. Whether you need technology to support hybrid workers, or simply want tools to work more efficiently, we have the products and experience to make it happen.

## Our approach



# Who We Are



## Upland Content Lifecycle Automation improves productivity and reduces operational costs by enabling digital processes for organizations of any size across all industries.

Our products—AccuRoute, BA Insight, FileBound, InterFAX, Objectif Lune, Qvidian, and Upland Intelligent Capture—combine disparate, disjointed business processes into streamlined content lifecycles that enhance search, capture information and data, automate workflows, improve print services, enhance sales cycles, and offer strategic insights based on intelligent analytics. Our technology removes process bottlenecks and improves efficiency, all while ensuring critical data is secure and compliant to standards across all industries.

Upland Content Lifecycle Automation products empower organizations to focus on high-value goals that boost business performance instead of getting lost in the process details of comprehensive content management and maintenance.

## We help organizations get more done.

### Enable work from anywhere

Make dealing with capture, documents, workflow processes, and archival remotely a breeze with the right resources.

### Increase productivity

Automate processes and streamline search to alleviate tedious manual work and eliminate errors, so workers can focus on high-value work.

### Secure data

Align processes with compliance standards and keep sensitive data secure using encryption, logging, backups, and data loss prevention.

### Provide access to relevant content

Give staff the ability to uncover information needed to complete their work from various systems using one AI-enabled search platform.

### Lower costs

Automate processes, consolidate infrastructure, and integrate with existing systems and applications to reduce bottom lines.

### Enhance sales cycles

Rapidly deliver high-quality, accurate proposals to win more business and anticipate needs by proactively sending proposals to vendors.

### Connect systems

Vastly improves communications processes using robust, integrated composition and automation capabilities.

### Improve customer satisfaction

Automating processes means organizations have more time and resources to deliver reliable, high-value products, ensure superior customer service, and improve response times.

### Ensure business continuity

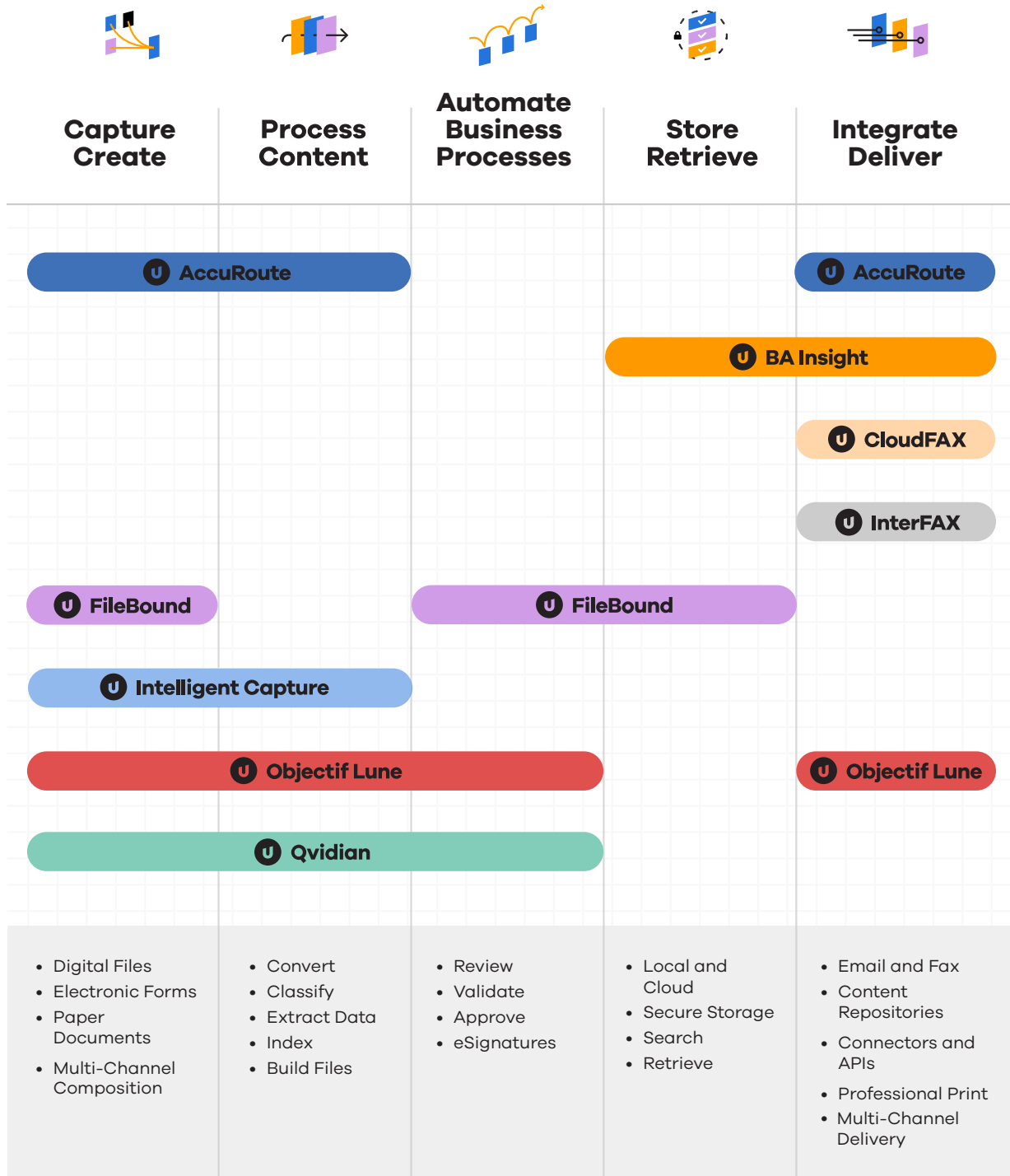
Provide the ability to seamlessly collaborate and work from anywhere with no business disruption.

### Consolidate vendors

One Upland, many comprehensive product solutions to choose from. Pick what fits for you.

# Content Lifecycle Automation

Here's a look at how our products work together to cover the entire content lifecycle.



# Our Products

## AccuRoute

AccuRoute enables secure scan, capture, and fax communications solutions for a hybrid workforce. Our server-based, out-of-the-box enterprise-class document process automation platform provides solutions to capture, process, deliver, and archive critical business documents from a single, unified platform. AccuRoute simplifies paper-intensive processes using automated data capture, Optical Character Recognition (OCR), data extraction, routing, and fax transmission. Transition from legacy on-premise fax to fully hosted capture and cloud fax to align with industry trends and seamlessly scale the product to any business's growing demands.



# 75%

Getting the right information to the right person is a problem for 3 out of 4 organizations.

### Capture from any device

Users can easily capture documents from any MFP scanning or mobile device and automatically extract data using OCR, conversion, and compression while preventing data loss.

### Robust security and encryption

Ensure data integrity and security using encryption at rest, authentication via private and public key signatures, and SSO integration. Provide a full audit trail for all documents and faxes.

### Enterprise capabilities

Provide users with automated activity reporting and analytics supported by Active Directory and easily scale infrastructure as needed.

### Flexible customization

Integrate with a wide variety of line of business systems, provide users with advanced routing capabilities and custom workflows, and institute individual, group, and admin permissioned views.

### Classification and extraction

Classification and extraction can intuitively read documents based on complex rule sets by searching for specific key terms and sequences for document profiling purposes.

### Global support

Access 24/7 support coverage, utilize interfaces localized in 7 different regional dialects, and output OCR to over 42 different languages to enhance worldwide adoption.



# Our Products

## BA Insight

BA Insight provides AI-driven enterprise search that delivers relevant, personalized, and actionable results by seamlessly connecting all systems to make information readily accessible using a single enterprise search box. One search bar eliminates guesswork on which systems have the right information, simplifying the work day by reducing the need to bounce between systems hoping to stumble upon the right content.



### Internet-like search experience

Use one search bar to access all internal resources using 90+ Connectors. Easily find the most frequent and relevant results using autocomplete and type-ahead suggestions. Enable “just ask” search functionality without taxonomy, just like speaking to a real person.

### Content previews

Enable users to quickly find pages with the most relevant content, highlight search terms to show all pages with a term. Simplify search evaluation processes without the need to save and download first.

### Team collaboration

Quickly connect users with internal experts to collaborate on ideas, get advice, and compare results. Help users find precise answers to help them perform their work faster and smarter.

### Unified results

Automatically surface recommendations and suggestions for additional content. Drive users to the information they need, all centralized on one personalized dashboard.

### Improved productivity

Provide access to advanced enterprise search from the programs users work in the most, including DMS systems, Microsoft Outlook and Teams, SharePoint, and more.

# Our Products

## FileBound

FileBound empowers the virtual workforce with cloud-ready, intelligent automated workflow and document management solutions. Our product allows users to build automated workflow processes and centrally manage documents to improve compliance, collaboration, and access to information.

### Workflow automation

Customizable workflow rules and a graphical drag-and-drop interface for means you can quickly create and edit workflows using a no-code configuration. Utilize automatic importing, escalations, and scheduled event capabilities.

### Document management

Digitize and store records securely in one place, perform one-click metadata searches for documents and files, and digitize all records in one secure central repository.

### Electronic forms

Replace outdated, error-prone paper forms and processes with one central online portal to capture and automatically route requests 24/7.

### Integrations

FileBound is powered by Dell Boomi to integrate with your existing systems, including CRMs, Human Resources, ERPs, and SISs, so you can minimize bouncing from application to application and just get down to business. Open APIs are also available.

### Robust analytics

Access insights dashboards to evaluate process efficiency and recognize trends based on patterns using predictive analytics. Perform comparisons to identify bottlenecks or areas for improvement, and anticipate the effects of current trends on future productivity.

### Enable a hybrid workforce

Improve records access, grant secure permissions to digital files, and organize and manage information more efficiently from anywhere.



77%

More than three-fourths of business owners want reliable, remote access to documents and systems.



# Our Products

## InterFAX

InterFAX helps users to cost-effectively fax at volume to anywhere in the world quickly, reliably, and securely. Our high-capacity, reliable, and globally accessible cloud fax solution enables transmission and reception of faxes from any internet-connected application, with no installations needed, and allows for an integrated faxing developer API to tailor services to any organization's needs.

### Robust security and compliance

Ensure security via TLS encryption for inbound and outbound faxes, authenticate via private and public key signatures, enable our "delete fax after completion." Align with data compliance mandates such as HIPAA, PHIPA, PCI-DSS, and ISO 27001.

### Enterprise capabilities

Delegate unlimited allowed senders and provide them with automated activity reporting and a full audit trail of sent and received faxes. Allow for bulk faxing for up to 20k recipients.

### Flexible developer API

Infuse cloud fax into any environment using our API to fully integrate secure, auditable fax with leading CRM, ERP, and email platforms.

### Advanced fax features

Provide users with mail merge features for lists and personalization and integrate with Salesforce. Allow for multiple fax destinations and deferred transmission.

### Capture features

Automate data extraction and indexing using OCR, conversion, and compression and send to customized document workflows.

### Global support

Access 24/7 support coverage in international languages as well as localized supports in many regional languages. Comply with global data sovereignty laws.



\$ **6T**

In 2020, data security breaches cost healthcare companies upwards of 6 trillion in the US alone.

# Our Products

## Objectif Lune

Objectif Lune helps organizations optimize transactional and promotional documents by automating manual processes to enable digital transformation without changes to existing systems or additional infrastructure investments. The product helps users create, manage, distribute and automate transactional and promotional documents while solving the challenge of integrating systems.

From data extraction to multi-channel delivery, Objectif Lune's OL® Connect includes features to elevate your business communications, including:

### Document composition

Design or repurpose any documents, create multi-channel communications, leverage data to build dynamic documents across systems, and enhance them using text, images, variable data, and more.

### Process automation

Automate processes and integrate with existing and third-party applications. Apply corporate standards and guidelines for creating, processing, and delivering communications and trigger business processes with ease.

### Multi-channel output management

Enable print or digital document distribution in various output formats. Utilize advanced features such as batch printing, sorting, and finishing to maximize print production control with optimized output formats.

### Remote printing

Simplify submission of print-ready documents, centralize print jobs, and facilitate digital communications. Ensure brand consistency and enable faster approvals processes from any location.

### Integrations

Integrate seamlessly with most ECM, DMS, email, digital signature, and print production systems and interact with existing structures such as ERP/LOB or mainframe. Modernize, digitize, and transition outbound communications from legacy systems.



# 90%

of CEOs believe the digital economy will impact their industry, but less than 15% are currently executing a digital strategy.

# Our Products

## Qvidian

Qvidian helps teams collaborate to create stand out proposals and RFP responses quickly, shorten sales cycles, conquer security questionnaires, track results, and score more wins. Stay ahead of deadlines by automatically drafting relevant answers and tailoring personalized responses. Find all the best answers in one centralized easy-access answer library, a reliable resource that enables teams to not only craft the best responses, but empower them with more time to proactively send out proposals to vendors.



# 30%

Proposal teams report  
30% faster RFP response  
times using Qvidian.

### **Central content library**

Help your proposal staff quickly find the answers they need with user-friendly folder structures and content tagging. Include action alerts, version control, and content expiration to ensure accuracy.

### **Automatic questionnaire importing**

Find relevant RFP answers by using document parsing that identifies headings, questions, and relevant answers in a snap.

### **Intelligent answer completion**

Provide users with recommendations, suggest relevant content, and auto-populate the best fitting answers utilizing AI to create stand out RFP responses faster.

### **Templates and document previews**

Enforce brand standards and style rules with templates and ensure accurate layouts and fast reformatting with version controls.

### **Collaborate, review, and approve**

Communicate with your team in product or via Office Online, Teams, and SharePoint. Enable multi-step assignment workflows for fast review and approvals supported by e-signatures. Always be ready for that next compliance audit.

### **Analytics reports and dashboards**

Utilize our user-friendly drag-and-drop custom report builder to provide staff with most-requested standard dashboards to view progress.

# Our Products

## Upland Intelligent Capture

Upland Intelligent Capture is a premier cloud-based multi-tenant product for organizations looking to leverage secure, nimble, and scalable capture capabilities that enable work from anywhere. This comprehensive capture technology fits the universal needs of any document-intensive organization while allowing the flexibility to tailor the solution to unique needs based on size or industry. The intuitive, user-friendly interface lays out the workflow inside a visual workflow designer, eliminating those daunting script-based workflow tools, and includes other features such as:

### Automated document profiling

Users can simplify document profiling by information such as date or vendor number using automated document classification and data extraction tools.

### Custom workflow creation

Configure an infinite amount of ways to create specific workflows based on an organization's needs.

### Mobile access

Access existing digital processes and workflows to capture and send content from any mobile device.

### User permission management

Users can be configured to have various privileges, such as workflow visibility. Access to features can be limited to specific users or subsets of users.

### Automated faxing

Based on workflow triggers and without manual intervention, automatically send digital faxes to preconfigured numbers for high-volume use cases.

### Forms classification and extraction

Classification and extraction can intuitively read documents based on complex rule sets by searching for specific key terms and sequences for document profiling purposes.

### Document indexing

Indexing is similar to classification and extraction but is a more manual process useful in specific scenarios. Using lassos and point-and-click OCRing, users can hasten data entry.

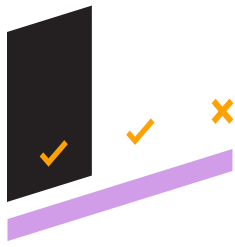


**37%**

of organizations have adopted or are considering cloud capture in the next 12-18 months.



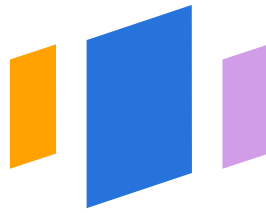
# Better Technology for Every Industry



## Healthcare

Our technology helps streamline time-consuming processes around search, medical records management, accounts payable, and human resources, all while complying with HIPAA in the United States and PHIPA in Canada to ensure the security of patient data. We integrate with existing EMR and ERP systems to provide real-time access and reduce operational costs and maintenance.

- Patient access and referrals with multi-channel document delivery and reminders
- AP and materials management processing
- AR and medical claims processing
- Employee applications, contracting, and onboarding
- Prescription routing
- Document image and metadata capture for HIS
- Secure cloud or on-premise fax communications
- Employee applications, contracting, and onboarding



## Legal

Although legal firms may never be completely paper-free, our products digitize processes so they can be paper light. Firms can create comprehensive, secure digital records processes, improve document accessibility, simplify common workflows, reduce costs associated with printed materials and storage, and empower staff to get work done any time from anywhere.

- Digitizing the mailroom
- On-demand capture
- Scan to legal DMS
- Vendor invoice processing
- Litigation support
- Intellectual property document management
- Matter-centric document handling
- Secure cloud or on-premise fax communications
- Electronic court filing (e-Filing)



## Financial Services

The financial services sector is one of the most document-intensive, highly-regulated industries. Our products help cost-effectively transition high volumes of paper documents into digital records while adhering to regulatory compliance mandates. We integrate with existing ERPs, CRMs, and other business systems to support business continuity and enhance customer satisfaction.

- Simplified content search and retrieval
- Streamlined branch communications
- Employee applications, contracting, and onboarding
- Accounts payable processing
- Simplified document routing
- Forms automation
- Loan processing
- Personalized, consistent, and timely multi-channel communications



# Better Technology for Every Industry



## Technology

From start ups to large companies, we help technology companies to digitize everyday processes, uncover information hidden in disparate systems, and boost efficiency so you can address the unique challenges faced by the tech industry. We get it—after all, we’re a tech company, too.

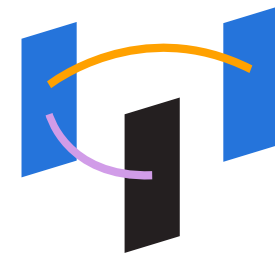
- Security and Due Diligence Questionnaire responses
- RFP responses
- Multi-step review and approval workflows
- Business workflow automation
- Employee applications, contracting, and onboarding
- Enterprise and intranet search
- On premise, hybrid, or cloud fax
- Vendor selection, contracting, and onboarding
- Accounts payable processing



## Education

We help busy educators streamline processes by providing secure and reliable access to critical student information and services. Our technology supports efficient central office operational processes, so that staff can streamline the many tasks they work on every day and focus more time on student achievement.

- Student enrollments and records
- Student health and safety/ intervention
- Transcript and records requests
- Employee applications, contracting, and onboarding
- Volunteer requests and background checks
- Grant and funds management
- Resource and equipment requests
- Vendor selection, contracting, and onboarding
- Accounts payable processing

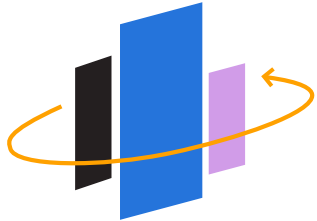


## Government

We help government agencies gain control of the vast amount of information they work with daily. Our products enable better communication with the public, create reliable payment portals for city utilities, streamline civic projects, and allow agencies to collaborate between offices with less effort.

- Procurement and contract bidding
- Information release authorization
- Project authorization
- Property records management
- Police records management
- Strong integration capabilities
- Emergency information distribution
- State and local attorney general communications
- Voter registration document transfer
- REAL ID \ Evidence of identity

# Better Technology for Every Industry



## Hospitality

We help travel and hospitality organizations receive and share documents through a secure, online portal, provide access to information across locations, and ensure the integrity of their customers' data, so they can focus on providing stellar service.

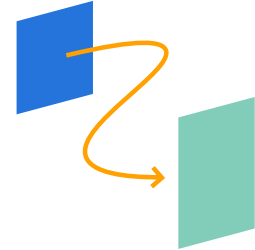
- Secure bookings from fax, email, and web-forms
- Data security via PCI-DSS accredited cloud fax
- Universal yet secure access to booking information
- Fast retrieval of customer information
- Accounts payable processing for invoices and expenses
- Employee lifecycle maintenance
- Vendor management



## Nonprofits

We help nonprofits streamline time-consuming operational processes that typically take lean but mighty nonprofit teams away from focusing on tasks that matter. Employees have more time to focus on the nonprofit's mission, and funds that are typically used on processes can be redirected to those in need.

- Assistance requests for clients in need
- Vendor management
- Accounts payable processing for invoices and expenses
- Employee lifecycle maintenance
- Volunteer coordination and background checks
- Expenses and travel reimbursement
- Grant and funds management
- Ongoing grantor audits



## Manufacturing

The manufacturing industry works at a break-neck speed and having control of documents is crucial for success. Our products help organizations to enhance existing systems to achieve greater operational efficiency, reduce costs, and improve response times while adhering to strict compliance guidelines.

- Automate document workflows
- Reduce operational costs, and time-to-market
- Secure document transmission
- Adhere to regulatory compliance
- Maintain a full audit-trail of all documents
- Accounts payable processing for invoices and expenses
- Employee lifecycle maintenance

# Let's get started.

Our mission is to simplify everyday work by transforming content-centric processes to make business more efficient.

If you'd like more information on our comprehensive product portfolio or want to learn how our products can be bundled together to create multi-faceted solutions, contact us to set up a product demonstration with one of our experts.

**Reach out to learn more.**



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upland

## Content Lifecycle Automation