

Document & Workflow Automation

Workflow Automation Designed for the Business User

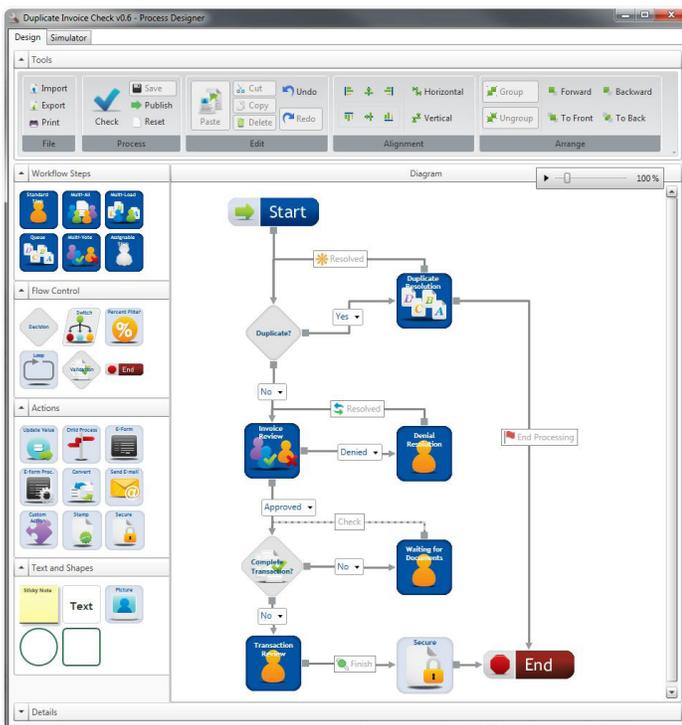
Most knowledge workers spend far too much of their workdays performing mundane, time-consuming manual tasks that lower employee morale and add little value to the business.

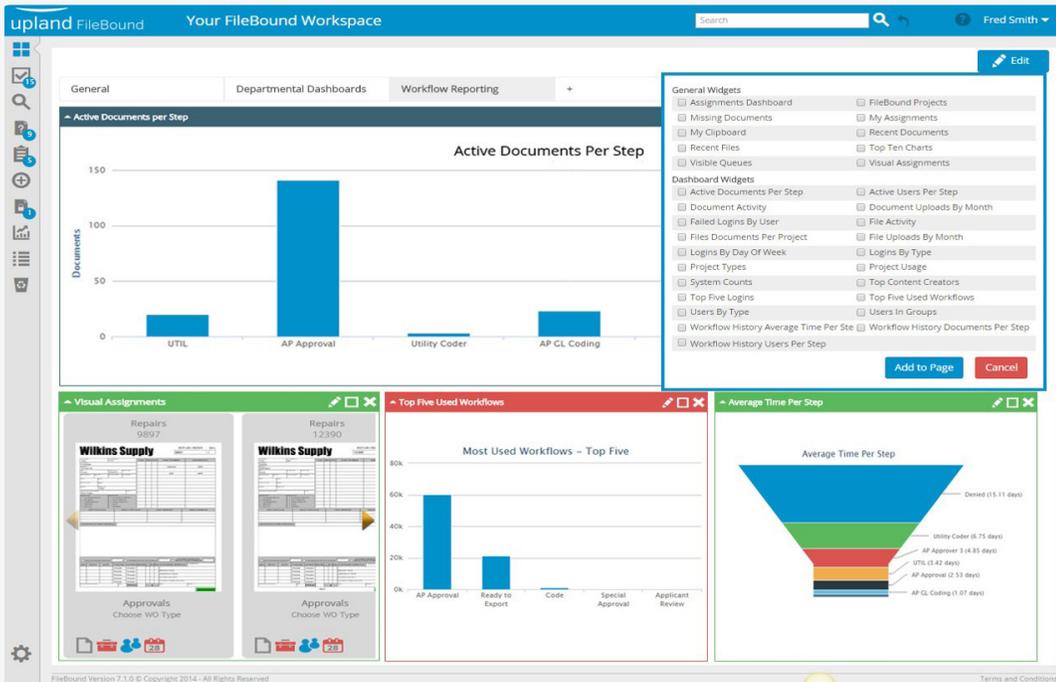
Upland's FileBound manages activities like routing documents, verifying data, or following up on stalled processes while automating business rules, so employee can focus on work that really matters.

Using standard templates and drag-and-drop design tools, non-technical FileBound users can quickly create and publish forms.

Organizations around the world use FileBound Workflow to automate multiple applications do the work they need to do from vendor invoice processing to application review and approval contract management and much more. Eliminating manual, paper-based processes lets these companies:

- **Automate approval processes** by electronically sending documents (e.g., applications, requests or invoices) to everyone who needs to approve them according to business rules (e.g., department, manager or invoice amount)
- **Route documents** to anyone who needs to review, act on or respond to them, regardless of their location, either one-by-one or simultaneously
- **Remove tedious steps in a process**, such as creating checklists, checking for a missing document, validating data or sending reminders to ensure that processes continue to move forward with minimal manual effort
- **Enforce compliance** with business rules and/or regulatory requirements, and provide documentation that all guidelines were followed
- **Enable employees to participate** in business processes, regardless of their location or device, so work gets done faster with less risk of lost documents





FileBound lets users decide what aspects of a workflow process they want to monitor, and then allows them to easily create configurable dashboards without IT resources.

Benefits of FileBound Workflow

- **Empower** every employee to work at peak efficiency to eliminate bottlenecks and hold the line on new hiring
- **Reduce** missed opportunities and customer frustration by completing important processes faster
- **Demonstrate** accountability to executives and regulators with immediate access to individual productivity and process integrity through workflow logs and configurable dashboards
- **Reduce** risk of human error that results in lost, misplaced or stalled documents by eliminating the need to route and track paper-based files or track confusing email threads
- **Avoid** stalled processes and manual tracking/reminders by automatically notifying a manager or co-worker when a task has reached an escalation point

Features

- **Ease-of-use requires less training** than other products and increases agility by enabling business users to make modifications as needs change, reducing reliance on IT
- **Process simulator makes it easy** to test workflow steps and scenarios without leaving the process designer
- **Device-agnostic access** supports BYOD policies and allows users to securely access FileBound whenever and wherever they want
- **Flexible, straightforward licensing** options make it practical and affordable to extend workflow processes to users throughout the enterprise

Learn more about [FileBound Workflow](https://uplandsoftware.com/filebound), who's using it and complementary functionality like E-forms and Analytics at uplandsoftware.com/filebound

About Upland Software

Upland Software (Nasdaq: UPLD) is an enterprise cloud software company that provides award-winning solutions in Project and IT Management, Workflow Automation and Digital Engagement. Our goal is 100% customer success, achieved through a unified operating platform that delivers the performance, scalability and support that over 2,500 Upland customers worldwide demand every day.