

## Workflow Automation: Accounts Payable for Legal

# Upland Software's cloud-native, end-to-end workflow solution optimizes AP processes to provide better legal information management

Legal departments and law firms of all kinds are looking for an all in one solution to control the information chaos that can surround even a relatively simple matter — like paying the bills.

Utilizing Upland AccuRoute's seamless capture and extraction capabilities, coupled with Upland FileBound's secure content repository, we're able to provide law firms with the components necessary to centralize documents and metadata from nearly any source. The end result: a reliable, comprehensive, and secure automation solution at a single cost.

### Capture

Receive documents via email to electronic copy, fax, or scan using any network enabled capture device or MFP. Consolidate invoices, POs, contracts, tax documents and more, and automatically extract data from forms.

### Extract

AccuRoute CX interprets information via an intuitive "extraction and review" to "classification and extraction" process. Data is sent to queues for quality control and approval before advancing.

### Verify

AccuRoute Queue is the quality control command center, assigning confidence intervals and validating critical data, allowing for easy internal collaboration.

### Gather

Create and host electronic forms directly in FileBound for use by internal or external customers to drive activities such as PO requests, client billing, or distributed invoice capture.

### Access

Let users work when and where they want with responsive cloud-based technology, eliminating bottlenecks in approvals, collaborations, and other tasks.

### Workflow

FileBound automates complex workflows so each invoice, exception or other process can be quickly deployed, monitored, and completed by staff from anywhere and any device.

### Integration

Seamlessly transition data to or from existing or future ERP and other financial applications, eliminating duplicate efforts and information silos.

### Analytics

Uncover intelligence hidden in the data through visual dashboards and insights into current AP performance and process status for further improvement.



Capture



Process



Quality Control



Workflow and Approval



Deliver to LOB

# Robust AP Automation Made Simple

AccuRoute and FileBound automate the flow of information for law firms by delivering innovative applications with greater usability and agility.

- **Cloud-native technology** delivers the accessibility, ease of deployment and scalability that can only be found in a product built from the ground up to be accessed via the web.
- **No hidden costs** because Upland's workflow solution is an all-in-one application offering a breadth of capabilities, allowing organizations to easily and quickly create or modify solutions.
- **Flexible, simple licensing and deployment models** that support how our customers want to work at a cost that delivers real and immediate ROI. Our structure makes it easy to securely extend the solution to additional users, even allowing limited access for remote or temporary users assisting with a specific matter — like an audit.
- **Exceptional focus on the user experience** with a streamlined interface that makes it easy to complete even complex tasks with minimal training.
- **Economical user licensing options** make it practical to extend secure access even to occasional or temporary employees, enabling a truly enterprise approach to work management.

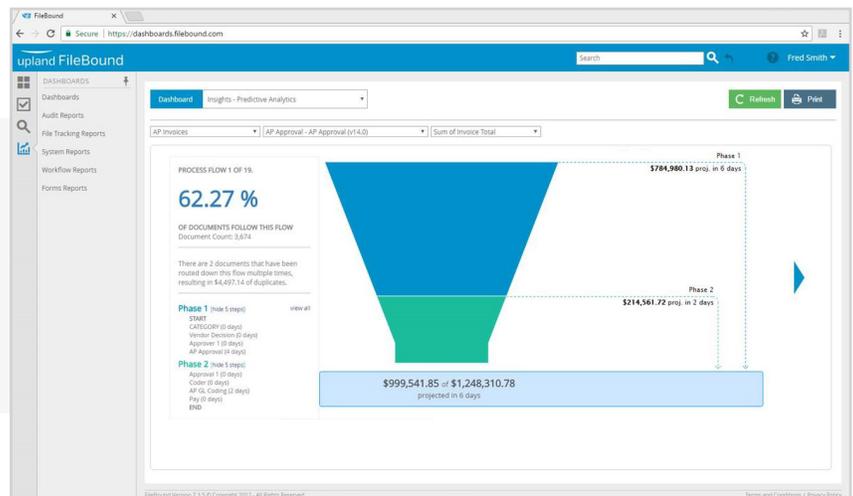
# Revolutionizing AP Work, Sustaining ROI

Upland's end-to-end solution streamlines Accounts Payable processes at law firms of all sizes, helping them:

- **Remove bottlenecks** to ensure that invoices are paid on time. No more time spent passing paper around, matching invoices to other documentation, or chasing down approvals.
- **Enforce compliance** with company policies and external mandates. Documents are stored in a secure repository in either native or standard formats such as PDF, and can be emailed or uploaded to meet filing requirements or be routed through internal processes. Automated workflow guarantees proper procedures are followed and documented, enabling compliance with audits.
- **Consolidate information**, eliminating the need for attorneys and staff to access multiple systems to get the information they need. Less time is spent searching for documents and data and more time is spent on activities that drive value for clients and the firm.
- **Cut costs and delays** associated with managing paper documentation. Eliminate missing and duplicate invoices that lead to inaccurate billing practices. The result: increased efficiency, cost savings, and reputation building via happier clients.

## Benefits of Predictive Analytics

Predictive analytics helps law firms make more informed strategic decisions to achieve business goals. Effortlessly explore data about employee productivity, transaction volumes, financial liabilities, vendor interactions, invoice turnaround times, and more to easily identify areas for improvement.



## 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.