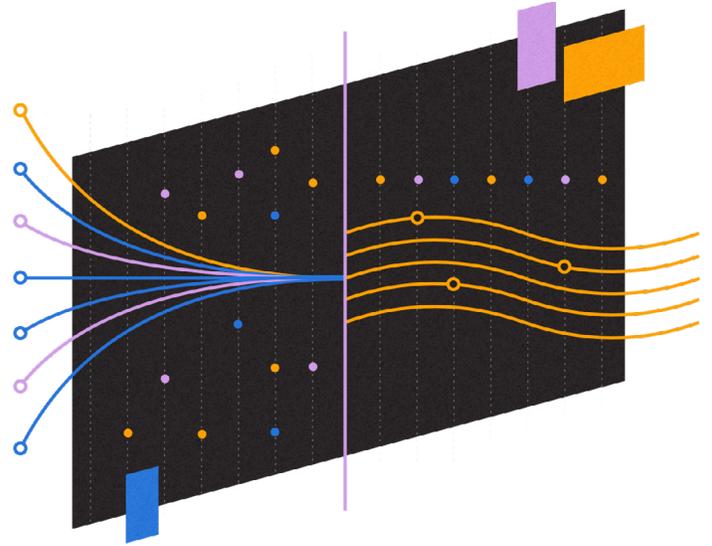


Legal records management for a digital era

AccuRoute optimizes records management for law firms by providing advanced capture, data extraction, and retrieval capabilities that seamlessly integrate with your existing systems.



Ditch piles of paper for something better.

Managing physical files comes with a bevy of challenges, not the least of which are wasted time and expense.

- Reduce or even eliminate the cost of printing, onsite storage, and record retrieval from costly offsite storage facilities
- Quickly track down documents using key data identifiers automatically extracted from each document using optical character recognition (OCR) and artificial intelligence (AI)
- Improve efficiency to provide clients with faster services—and de-stress your busy staff



Increase access while reducing risk.

Help attorneys and staff collaborate from anywhere using the devices they already have while reducing your bottom line.

- Secure client records and streamline work by digitizing everything at the point of arrival
- Provide immediate secure access to business-critical documents and communications—no more delays waiting for archived content
- Eliminate the risk of human error, loss, damage, theft, or unauthorized access to files to ensure compliance and business continuity
- Integrate with NetDocuments or iManage for seamless document retrieval

Access seamless scanning, validation, and retrieval capabilities

Adapt to the modern business era

Law firms are moving away from large brick-and-mortar offices and are thriving within smaller locations, often with a dispersed workforce. The shift to a remote-hybrid work model has accelerated the move away from the burdensome task of paper document management. Many firms are converting their documents to electronic images and leaving their real estate, storage, moving, and filing system costs behind. Digitizing documents also means improved accessibility, enhanced security, and better control of the data those documents contain.

Digitize paper records

AccuRoute is highly scalable and can scan millions of pages a month. To address the physical files already housed in a law firm's archive, AccuRoute can scan the volumes of paper in a batch function. By using routing sheets, records may be indexed and profiled prior to scanning, and then efficiently scanned in a high-volume process, using routing sheets as separator pages.

As active files move to closure and closing documents are prepared, paper files can be easily imaged and stored alongside the electronic content for a complete document record. The resulting image files are fully text-searchable, making them available for enterprise search, e-discovery, and any other future accessibility requests. Records information and locators may be indexed to provide easy access and retrieval once they are sent to storage.

Ensure data accuracy

With AccuRoute, document workflow application works as a "validation station" for records scanning in process. The staff performing the scanning can preview images and associated indexing information before releasing to electronic storage. Staff can also add quality control into your processes, by sending back for a rescan if the image quality is not sufficient.



Additional benefits of electronic records management

- Simplify processes and put end users at ease
- Reduce time spent maintaining physical paper documents
- Enable MFP devices with panel buttons to prompt users for key data to fit business workflows
- Focus time on high-value tasks, instead of searching for documents or archived files
- Eliminate printing, courier, and real estate costs needed for document storage
- Increase universal accessibility for remote staff, so they can get work done anytime, from anywhere and any device
- Decrease waiting time for document turnaround
- Improve security and decrease document loss or misfiling due to human error

Easily search and retrieve

Once documents have been digitized, search and retrieval of current case files or archived materials is simple. Using OCR and machine learning technology, relevant data is extracted from each document to ensure it is stored in the correct case file and can be accessed using simple search terms like name, client number, or additional keywords. AccuRoute integrates seamlessly with legal DMS systems such as iManage and NetDocuments, so retrieval is a breeze.

No more endless searching, digging through paper storage files, or waiting for time-sensitive materials to arrive via courier from offsite storage. AccuRoute gives you control over the data and documents you have so your legal staff can access securely and easily as needed.



This is about more than going paperless. You need control of the data you have.

Implementing electronic records management processes enables secure, standardized ways to capture relevant content and keep work moving.



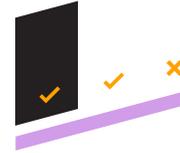
Get the data you need, no action required

Perform automated forms classification and data extraction to grab relevant content, ensure accuracy, and then deliver it to the right place.



Make sure you know what your data is up to

Get red flag alerts so you can anticipate issues before they happen. Whether by accident or by malicious means, data loss or theft is a big no-no.



Put secure, compliant processes in place

Provide a digital footprint for every single document that comes into your firm, so you're well prepared for the next compliance audit.



Converting years' worth of paper into searchable, instantly accessible content has substantially transformed our trusts and estates practice. Our proactive records scanning project saved our lawyers and staff countless non-billable hours and has dramatically improved our service levels and overall client experience.

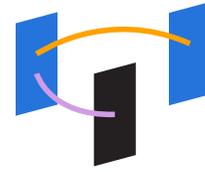
Robert Baumgarten
Chief Information Officer, Shulman Rogers



25% of all ransomware attacks in early 2021 target small and medium-sized law firms

76%

of US attorneys would prefer to work remotely



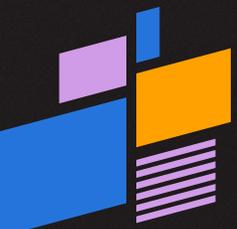
Complementary products

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

-  **Intelligent Capture**
-  **InterFAX**
-  **FileBound**



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 AccuRoute can do.

[Request a Demo](#)

Upland AccuRoute helps organizations accelerate business processes by allowing users to easily capture, process, deliver, and fax content from any device using a single, unified platform. AccuRoute automates data capture and extraction using optical character recognition (OCR) to securely process through workflows to applications, people, or storage.

