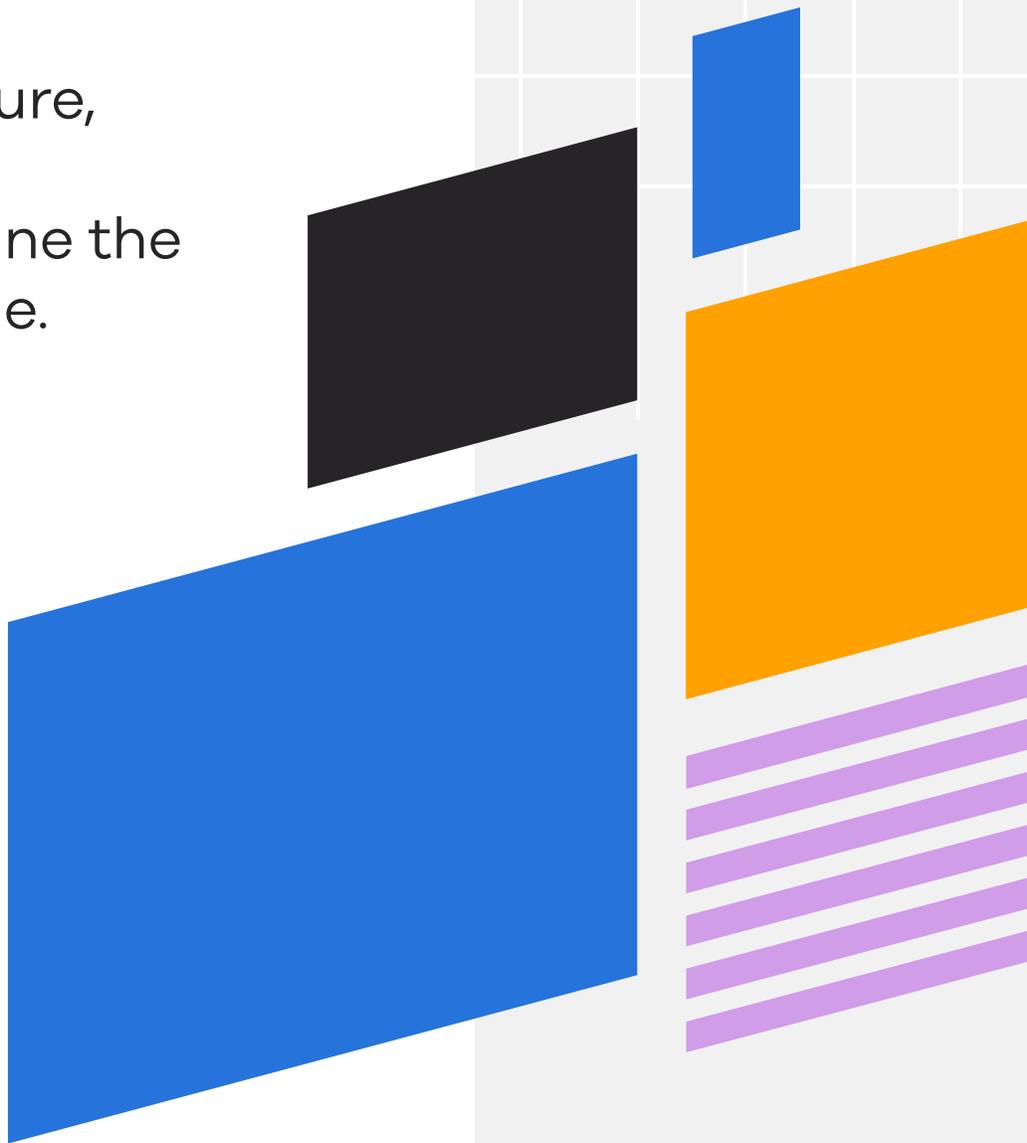


Upland Document Workflow Product Portfolio

See how our capture, fax, and workflow products streamline the document lifecycle.



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Enabling a remote workforce

Digital Transformation

Global events in 2020 created unprecedented business challenges across all industries.

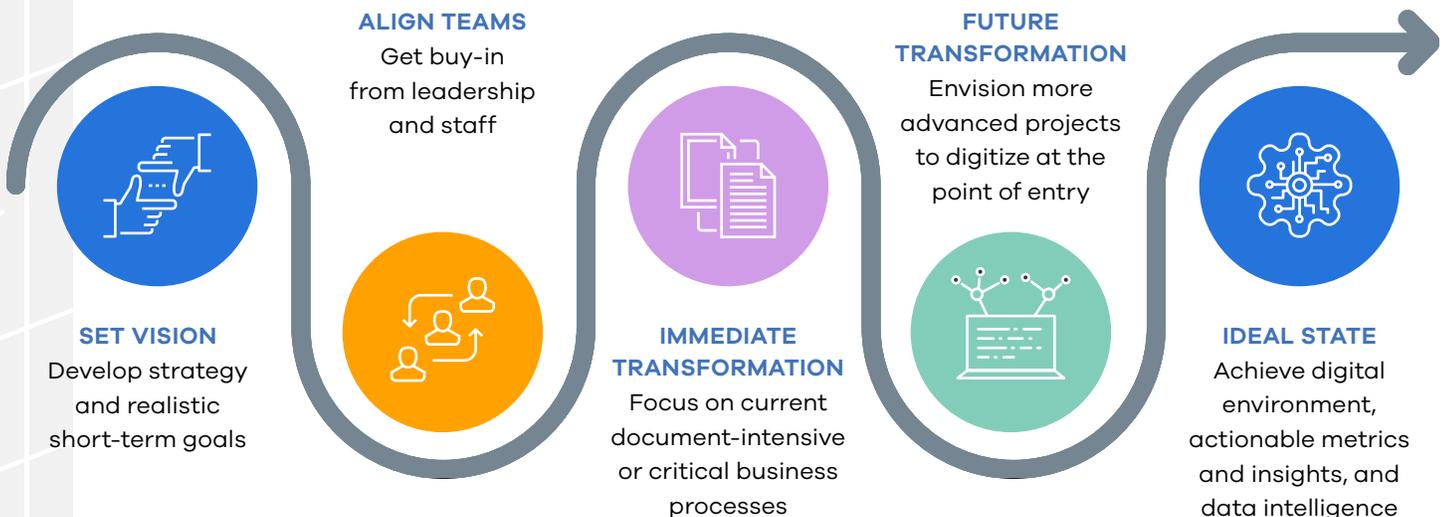
But for organizations with digital data management and communications solutions already in place, work continued, their customers benefited from uninterrupted services, and employees were able to transition to a remote-working reality using existing systems.

Digital transformation is the act of fundamentally transforming an organization to enable it to adapt to rapid market changes. But it's more than that, too. Implementing digital strategies helps organizations 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.

Upland empowers organizations by providing them with technology to enhance flexibility and bolster security, so they can meet any challenge and continue with business-as-usual. Whatever the future business climate turns out to be, we're enabling the workforce, from the central office to home offices.

We are committed to providing best-in-class technology to address the entire document lifecycle and promote digital transformation. Whether you're searching for technology to work remotely, or simply hoping to work more efficiently, we have the products and experience to help.

Our Approach



Who We Are



Upland Document Workflow products improve productivity and reduce operational costs by enabling digital transformation.

Our products — Upland Intelligent Capture, InterFAX, AccuRoute, and FileBound — combine disparate, disjointed business processes into streamlined lifecycles that capture data and content, automate workflows, 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 and for any size business.

Upland Document Workflow 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 Remote Work

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

Increase Productivity

Automate processes 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.

Ensure Business Continuity

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

Lower Costs

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

Improve Customer Satisfaction

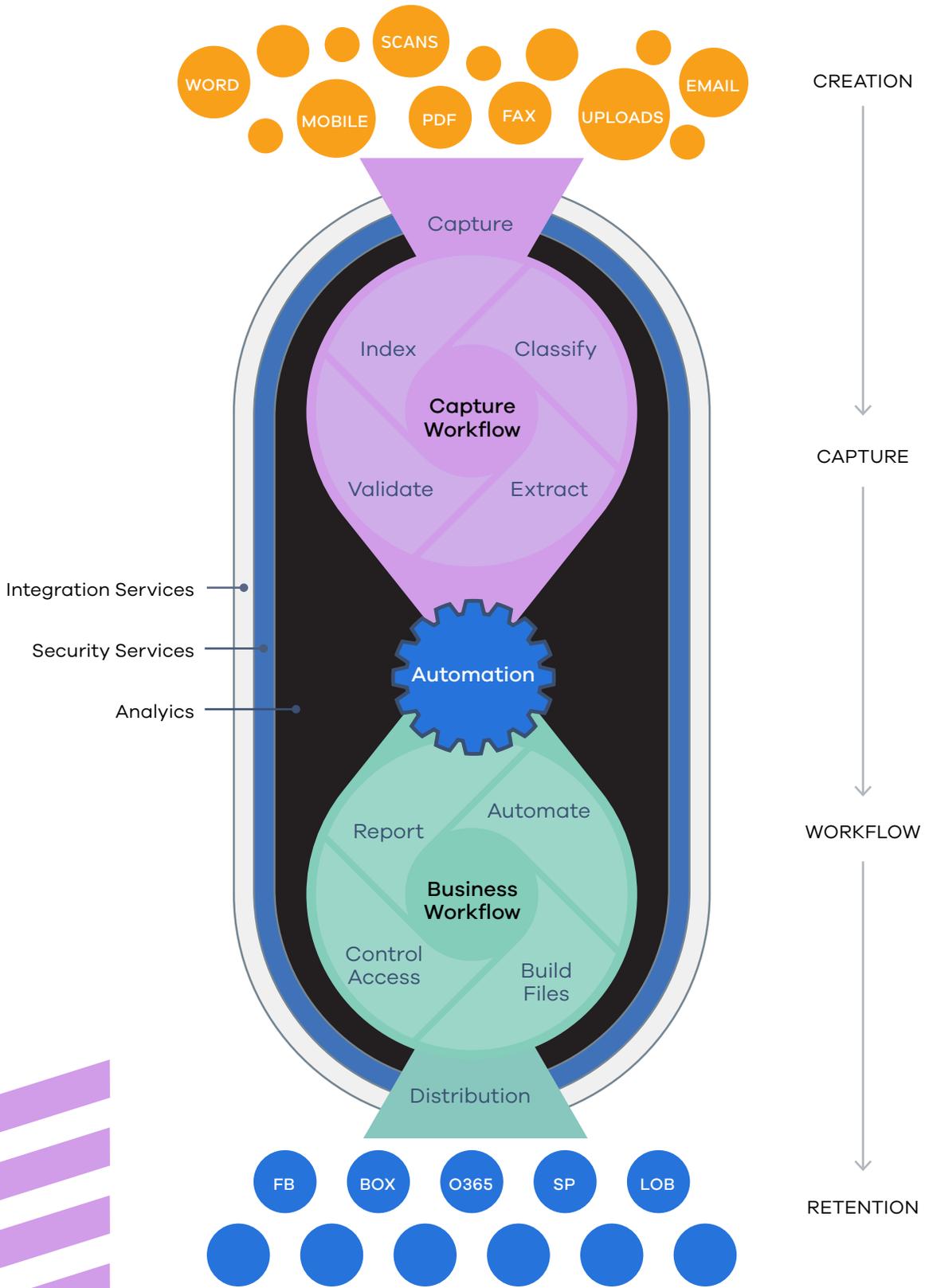
Automating processes means organizations have more time and resources to deliver reliable, high-value products, ensure superior customer service, and improve response times.



We could not have made it through Spring 2020 without a forward-thinking digital strategy. We were prepared in ways we could not have imagined.

Global Top 50 Law Firm

Streamline the Document Lifecycle from Start to Finish.



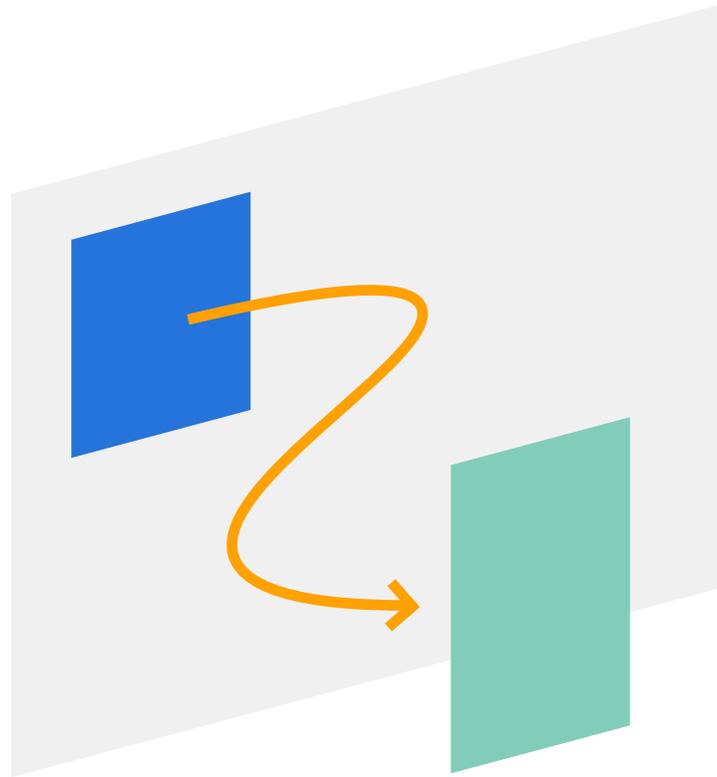
Our Products

Upland Intelligent Capture

Upland Intelligent Capture is the premier multi-tenant, cloud-ready capture solution outfitted with machine learning technology to automatically gather images and improve data accuracy every time information is captured and is accessible from any desktop or mobile device.

“Upland Cloud Capture solutions have allowed our customers to refocus their technology efforts toward enhancing the business workflow process by alleviating the everyday tasks of on-premise server maintenance and administration.”

Rachel Weseman
President, DCMWare, Inc.



AccuRoute

Upland AccuRoute enables secure scan, capture, and fax communications solutions for a remote 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.

“Converting years’ worth of paper into searchable, instantly accessible content has substantially transformed our practice, saved countless non-billable hours, and dramatically improved our service levels and overall client experience.”

Robert Baumgarten
CIO, Shulman Rogers

Our Products

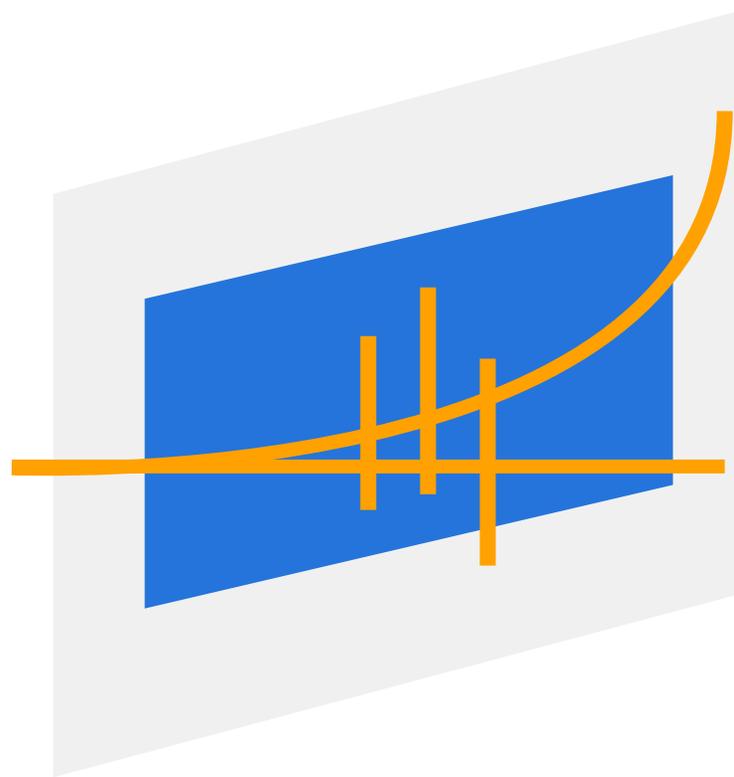
InterFAX

Upland 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.

"We have used InterFAX for bulk fax needs for multiple years and have found them to be simpler and more efficient to work with than other fax service providers. Particularly their ability to communicate securely through their API/web service."

Renzo Luzzatti

President, US-Rx Care



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.

"FileBound's workflow and document management solutions empowered us to unburden our staff from manual time-consuming duties that filled their days. Now, our employees can spend more time on tasks that matter most for the community we serve."

Lisa Wagnon

Administrative Management,
Volunteers of America Southeast Louisiana

New in 2020

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

Upland Intelligent Capture can be configured in an infinite amount of ways to create specific workflows based on an organization's needs.

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

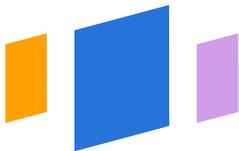
Upland Capture Products

Upland Capture combines the best of AccuRoute and Intelligent Capture to fit the universal needs of a document-intensive organization while allowing the flexibility to tailor technology to unique needs based on size, industry, and the location of workers.



Upland Cloud Capture

Based on Upland's unified operating platform and cloud-based infrastructure, Intelligent Capture delivers simple, comprehensive end-to-end capture technology that is pioneering within the industry. End users and admins alike can harness the full value of robust document capture without the weight or complexities of an on-premise, server-based product. Simply navigate to a webpage from a desktop or mobile device, log in, and start utilizing the service to infuse captured images directly into existing workflows.



Upland On-Premise Capture

AccuRoute's on-premise capture integrates with existing scanning and MFP hardware and offers a variety of customization features. The rules-based architecture allows images, documents, and data alike to be automatically extracted and transformed mid-transit from a desktop or mobile device. Point-based transformations using functions such as OCR, conversion, compression, and forms extraction are automated to simplify processes — and unburden staff.

Customized Workflow

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

Automated Data Entry

Forms automation, OCR data extraction and indexing, workflow rules, and validation eliminates manual entry and human error.

Device Integration

Seamlessly dovetail with existing MFP and scanning devices with the ability to add customized buttons to the device panel.

Centralized Interfaces

Reduce application disparity and "screen bouncing" with our home screen user experience.

Enhanced Secure Fax

Automatically send encrypted and secure digital faxes to preconfigured numbers for high-volume use cases.

Dashboards and Reporting

Customizable dashboards and key analytic metrics improve processes by promoting transparency and uncovering inefficiencies.

Mobile

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

Audit-Ready

Full access and insights on data that has been captured, validated, and distributed.



Upland Intelligent Capture Mobile

In response to the growing need for cloud-ready solutions, we provide organizations that depend on remote workers the ability to access the digital processes and workflows they are already familiar with from any mobile device.

Security-Focused

All captured images are encrypted and leave no trace on the device's local storage, aligning with industry regulations to enhance auditability.

No Installation

Built as a browser-based application, permissioned users simply need to travel to a webpage and log in to get started.

Multi-OS Support

The solution is available for both iOS and Android-based devices, an essential component to providing technology that is easily accessible for everyone.

Unlimited Users

Effortlessly roll out remote capture to any number of staff members, as pricing is based on the number of images sent through the application.

Prompt for Index Data

Configure workflows to prompt users for Index Fields, creating the opportunity to enter metadata associated with the workflow for use downstream easily.

Image Processing

Immediate pre-processing automatically detects boundaries, cleans up the image, crops, and corrects perspective.

Upland Fax Products



90%

Most healthcare organizations continue to rely on fax machines for their communications

Upland Cloud Fax

The combined capabilities of AccuRoute Cloud Fax and InterFAX can be tailored to any organization's needs without sacrificing security, convenience, or scalability. We want to make faxing as simple as emailing or logging into a web portal from any device.

Convenience

Send and receive faxes online via any email program — no need for fax infrastructure. Route, forward, print, or delete faxes just like an email.

Scalability

With hundreds of phone lines and robust data centers across the globe, our service can handle any volume of faxes without a busy signal.

Customizable Delivery

Send fax confirmation emails based upon success or failure, and customize the number of retry attempts as needed.

Security

Built-in incoming/outgoing SSL/PKI encryption, "Delete Fax After Completion," user authentication, and audit trails.

Compliance

PCI DSS Level 1-certified and adheres to HIPAA, PHIPA, GDPR, and the Data Protection Act of 2006.

Robust Capabilities

Active-active infrastructure, separate infrastructure, private queues, and secure, dedicated servers create a robust user experience.

Cost Savings

Pre-paid, easily adjustable subscription packages based on customer needs, with no contracts, hidden costs, or fees.

Industry-Leading Support

Expert customer support via phone and email in multiple languages helps to resolve issues quickly.

Upland Hybrid Fax

This integrated option brings together the best of both worlds, providing users with all the backend connections, capabilities, and benefits of on-premise fax as well as the broad processing functions of cloud fax.

Fast Implementation

Easy integration into existing AccuRoute environments.

Scalable

Solution can grow alongside an organization's needs.

Cloud-Ready

Enables local and cloud integrations quickly and easily.

Flexible Capture

Distributed capture through a customizable software architecture.

More Control

Organizations have a full control over their AccuRoute infrastructure.

Integrations

Seamlessly dovetails with existing MFP hardware and software solutions.

Resilient Service

Built to seamlessly support redundancy, failover, and load balancing.

Versatile

Enables other AccuRoute modules, such as AccuRoute Content Monitor, AccuRoute CX, and AccuRoute Server Monitor.

Robust Security

Complies with a variety of global data sovereignty compliance mandates.

Upland On-Premise Fax

Connect AccuRoute to any existing environment and integrate from MFP to DMS such as iManage or NetDocuments. AccuRoute scales to any size and keeps data segregated outside of cloud systems if needed.

Cost-Effective

Pricing based on fax volume, ensuring suitability for small or large businesses.

Flexible

Users can leverage true fax boards or voice-over-IP (VoIP) protocol fax methods.

Enhanced Security

Automatically search for flagged terms such as "confidential" or SSN sequence to configure next steps and ensure data security.

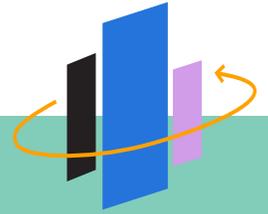
Integrations

Seamlessly dovetail with existing hardware and software solutions.

Full Control

Gain oversight of infrastructure via local devices, such as MFPs, utilized by the AccuRoute Server.





FileBound was key for us in moving to a more automated, paperless environment.

Lisa Wagnon
Administrative Management
*Volunteers of America
Southeast Louisiana*

Upland Workflow Products

With FileBound and Intelligent Capture, teams can easily manage the data they work with every day. Our workflow capabilities handle the complexity of intelligently managing content and processes from the point of capture through transmission, workflows, approvals, and retention. We securely automate the path documents take, so each document knows precisely where to go and what to do when it arrives.

Powerful Workflow

Build automated workflows and centrally manage documents to boost transparency, improve collaboration, ensure compliance, and enhance accessibility.

Analytics Tools

Build intelligent processes with baked-in analytics and process insights, performance comparisons, and predictive analytics.

Eliminate Content Searches

Intuitive content delivery, drag-and-drop functionality, and instant notifications help to anticipate and intelligently deliver content relevant to a user's needs.

Gather eSignatures

Integrations with DocuSign and HelloSign allows users to easily capture legally binding eSignatures online.

Streamlined Configuration

No coding and no IT configuration allows users to easily implement the changes they need immediately, so they can keep business moving and see an instant ROI.

Easier Content Creation

Online electronic forms capabilities enhance communications by creating a central portal to organize and gather information.

Strong Integration Capabilities

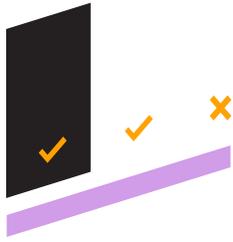
Build end-to-end automated solutions that integrate with existing systems to maximize productivity and eliminate data silos.

Compliance

Enforce necessary compliance standards, audit, and document complex privacy and security regulations.



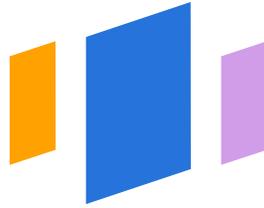
Better Technology for Every Industry



Healthcare

Our technology streamlines time-consuming processes around medical records management, accounts payable, and human resources while complying with HIPAA in the United States and PHIPA in Canada to ensure 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
- 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)

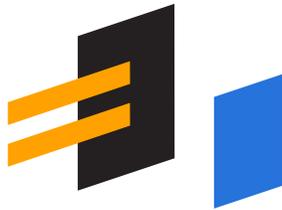


Financial Services

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
- Compliant document management
- Employee applications, contracting, and onboarding
- Accounts payable processing
- Simplified document routing
- Contract management
- Forms automation
- Loan processing

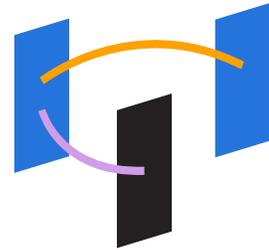
Better Technology for Every Industry



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

Engage with us.

We partner with smart leaders who take pride in being at the forefront of digital transformation technology. We're eager to help you grow your business and provide customers with best-in-class products and business strategies.

If you'd like more information on our comprehensive product portfolio, contact our team or set up a product demonstration.

Reach out to learn more.



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