

## Document Capture, Fax, and Workflow Platform

# AccuRoute At a Glance: Document Capture, Fax, and Workflow Platform

AccuRoute is a server-based, enterprise-class document process automation platform that provides solutions to capture, process, deliver, and archive critical business documents. This out-of-the-box, highly scalable solution enables capture, fax, and document workflow solutions from a single, unified platform.

AccuRoute can drive simple or complex solutions involving millions of documents per month directly from your desktop or any “smart” multi-function peripheral (MFP).

The AccuRoute Server converts documents to a variety of formats including PDF, text-searchable PDF, bookmarked PDF, DOC, JPG, RTF, TIF, TXT, and XLS, then collects and provides document-related metadata, validates information, OCR's and compresses and delivers documents to the destinations required.

## Data Collection

The metadata collection for this document can be implemented with AccuRoute by:

- Profiling documents using native document management interfaces and screens
- Extracting data from the document
- Printing/scanning with prompts to capture new information at the MFP panel when scanning
- Validating collected data against pre-defined values

## Data Delivery

When processing is complete, AccuRoute simultaneously delivers the document image and its related information to the desired destinations. AccuRoute enables multiple processing tasks and with a single scan, delivers to any number of destinations, including:

- Scan-to-Self - email, cloud repository, network folder, or web folder
- Scan-to-Distribute - email, fax, printer, and distribution list
- Scan-to-Store - enterprise content management (ECM) including document management, records management, litigation support systems, cloud repositories and traditional enterprise content management systems, repository, archive, or network folders
- Scan-to-Line-of-Business (LOB) Application - financial systems, time and expense management, CRM, etc.

### Solution Use Cases

#### Legal

- Records scanning
- IP document processing
- Invoice processing
- Litigation support
- Document management
- Mailroom automation
- E-filing

#### Healthcare

- Accounts payable and receivable
- Centralized billing
- Secure fax-based communications
- Human resources and employee management
- Medical claims processing

#### Financial Services

- Branch capture
- Compliant capture
- Contract management
- Forms automation
- Loan processing

#### Enterprise

- Branch & retail communications
- Contract management
- Credit applications
- Fax integration and consolidation
- Order processing
- Procurement
- RFQs and RFPs
- Student Records

## Device Integration

AccuRoute offers a high level of document management efficiency by providing capture, conversion, and delivery capabilities from the desktop or from the front panel of an MFP. AccuRoute leverages and integrates with the required identification or authentication provided by most MFPs, allowing users to access their personal distribution lists. Options include:

- Scan to Personal or Public Distribution Rules
- Scan to MyAccuRoute (default distributions)
- Scan with Routing Sheet
- Scan to Fax
- Or other customizable options

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*“We wanted a solution that would let our people work at their desks and then simply walk up, place their documents into the document feeder, push a button, and let the system handle all of the conversions and routings. We wanted the utmost flexibility.”*

— Monroe Horn, CTO, Sunstein, Kann, Murphy & Timbers

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## Enterprise Fax

With every AccuRoute platform your organization can utilize a full-featured fax system compatible with any networked, scan-enabled device, fax machine, or digital MFP. Your organization will strengthen security and avoid significant costs through the consolidation of scan/fax machines and third-party fax providers. Customize your fax server to send faxes only to authorized recipients, eliminating any accidental release of confidential information. AccuRoute also supports mixed fleets (vendors and models).

## 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.

## Simultaneous Document Conversion and Distribution

AccuRoute enables end-users to merge mixed-mode (printed and electronic) documents, compress them, and convert them to numerous formats, including e-filing preparation (splitting and merging files based on their file size or page count). Users can also define their choice of multiple document destinations, from e-mail, to fax, to DMS. All routing rules can be user-driven, taking the burden off IT staff.

## Customizable for Small-Medium Businesses to Large Enterprises

AccuRoute has solutions for businesses of all sizes that can be customized based on end-user and hardware needs. AccuRoute is enterprise scalable, deployable, and manageable, granting organizations the freedom to grow at their own pace.

## AccuRoute Extensible Platform

AccuRoute is an all-inclusive document capture platform that includes tools that help automate manual document related tasks while making storage of those documents easier. With integrations for most major cloud repositories, vertical specific business applications, and a database application of its own, AccuRoute can propel any company towards progressive business processes.

## AccuRoute Apps

This up-to-trend interface is the workflow hub for all AccuRoute products. With functionality complementary to AccuRoute Queue and the AccuRoute Mobile Client, AccuRoute Apps allows for the AccuRoute platform to be more customized than ever. Users can “pin” and “unpin” their favorite workflows to their AccuRoute Apps home screen, leverage image preview and release, and incorporate workflow options.

## Direct AccuRoute Support

AccuRoute provides award-winning support to help clients realize the benefits of our solutions and achieve renewed success in their day-to-day business processes.