

Document & Workflow Automation for Contract Management

Upland's FileBound Reduces Costs by Creating Transparency at Every Step

Whatever your industry, it's likely that your employees are spending too much time routing, tracking, and maintaining their contracts. How can you eliminate the constant shuffle while maintaining the precision needed to keep everything efficient and compliant?

FileBound is your solution to contract chaos. From drafting, to client approval and renewals, our system enhances your Contract Management protocol. The system automatically routes documents for approval and communicates tasks to appropriate stakeholders, monitors progress and checklists, and reminds stakeholders of time-sensitive tasks like deadlines, expirations and renewals.

For added convenience and security, all documents may be executed via DocuSign and can automatically route to our secure cloud-based libraries for compliant, accessible storage.

Benefits

- **Simplify new client or vendor paperwork** by using FileBound's public forms portal to access a New Contract Request form and automatically populate in the appropriate contract template, saving both time and money
- **Standard, automated processes** let users organize and send contracts to others for revisions, prioritize based on due dates and other criteria, and give visibility into who needs to take the next action on a specific contract
- **Automatic import from email** means FileBound can remove contract attachments from messages, store it in the system for processing, and notify appropriate parties
- **Improve audit preparedness** by storing all contracts in one central, secure location (either on-premise or in the cloud), where documents are cataloged in a searchable database that's easily accessible from any PC or mobile device
- **Reliable version tracking** means all versions of every contract are fully tracked and easily accessible to appropriate employees with permissions

FileBound gives you a better understanding of your contracts and suppliers, which in turn gives you stronger ground and information needed to negotiate better terms, by reestablishing discounts based on scale and reducing your number of overall suppliers.

Supplemental Template Libraries

Your FileBound solution includes five contract templates, but if you need more, we'll happily work with you to create additional templates for your contract library, resulting in consistency and time saved.

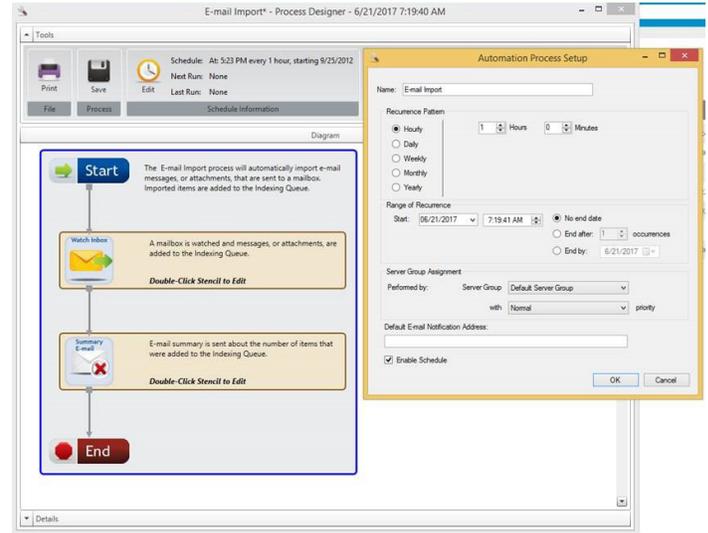


New Contract Request Form

With FileBound's public forms portal, both employees and external third-parties can complete New Contract Requests. By using a customized URL, information submitted on the form can be automatically populated in the requested contract template.

Automatic Import from Email

When a contract is sent to a specific inbox, FileBound removes the attachment and automatically files it away. Employees are auto-notified when a contract has been added or is ready for review.



Compliance and Audit Preparedness

All contracts are centrally located and consistently cataloged in a searchable database that's securely accessible anytime, from anywhere. Appropriate individuals have access to their contracts at a moment's notice.

Name	Account Executive	Type	Status	Date of Execution
ACM1	Blaine Johnson	CONSULTING AGREEMENT	Executed Contract	04/17/2015
James Smith	Blaine Johnson	EULA AGREEMENT	Cancel	
Jeff Strong	Blaine Johnson	CONSULTING AGREEMENT	Negotiation	
David Collins	Blaine Johnson	CONSULTING AGREEMENT	Executed Contract	02/24/2016
Best Buy	Blaine Johnson	CONSULTING AGREEMENT	Signature Process	
Jerry Rice	Blaine Johnson	CONSULTING AGREEMENT	Negotiation	
test	Blaine Johnson	CONSULTING AGREEMENT	Cancel	
Jesse Kimberly	Blaine Johnson	CONSULTING AGREEMENT	Negotiation	
Jason Wilson	Blaine Johnson	CONSULTING AGREEMENT	Negotiation	
Tina Fey	Blaine Johnson	CONSULTING AGREEMENT	Negotiation	
Luke Oswald	Blaine Johnson	CONSULTING AGREEMENT	Negotiation	
Jason Wilson	Blaine Johnson	CONSULTING AGREEMENT	Negotiation	
Lucy James	Blaine Johnson	NDA Mutual Agreement		

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.