![U FileBound]

Document management and workflow automation

FileBound boosts efficiency and productivity by eliminating tedious tasks through customized workflows that let teams easily create, route, review, process, and retrieve content.

Document management

Easily store and protect critical business content in a secure, centralized repository.

- Collect information from virtually any format: email, fax, paper, forms, and more
- Integrate with existing business systems
- Quickly locate records across systems using the user-friendly dashboard
- Access documents using any internet-enabled device with FileBound's cloud-based software
- Configure permissions and security settings

Workflow automation

Eliminate manual handling, speed up administrative processes, and reduce human error.

- Use easy drag-and-drop interface to build workflows for any task without coding
- Create dynamic rule sets to route data and trigger operations
- Add business rules or regulatory requirements to ensure compliance
- Set up scheduled events and action alerts
- Customize dashboard to monitor progress and review process analytics

Electronic forms

Provide online access to critical forms for internal and external customers and users.

- Increase convenience with 24/7 access to forms
- Allow users to attach files
- Save on paper storage costs

Flexible integrations

A comprehensive integration platform and API connect users to common business systems.

- Integration platform powered by Dell Boomi
- Open APIs allow for custom integrations with existing systems
- Fused interface provides access to data from one screen
- Single Sign-On (SSO) integrated footprint

Robust analytics

Make data-based improvements to business practices and workflows.

- Five Insights Dashboards evaluate process eficiency
- Predictive analytics recognize trends based on patterns
- Performance comparisons identify areas for improvement

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Workflow automation solves universal needs across industries

Whatever your focus, workflow automation enhances staff efficiency and improves user experience.

Nonprofits

- Quickly gather approvals and secure resources for client-related requests
- Eliminate the paperwork burden for smaller teams or departments
- Enable faster fundraising requests, volunteer applications, and more

Education

- Fast-track student needs such as enrollment, financial aid, and transcripts
- Sync with student information systems (SIS) to add data to student files
- Streamline staffing needs such as hiring, reviews, PTO requests, and payroll

Government

- Create online portals for utility payments, voter registrations, requests, and more
- Allow for faster communication and data transmission between offices
- Ensure uninterrupted, anytime access to critical community services

Human resources

- Simplify hiring with online applications and supporting data uploads
- Automatically route to workflows upon submission to autopopulate records and trigger next steps in the process
- Eliminate paper time-off requests, performance review documentation, and more

Accounts payable

- Automate POs, expense reimbursements, and other accounting processes
- Enable faster turnaround time by providing secure eSignature approvals
- Create vendor self-service portals to easily submit documentation

Financial services

- Digitize and organize financial documents to improve compliance
- Easily locate information with central document storage
- Streamline business processes with workflows and electronic forms

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Automate approvals

FileBound streamlines the approval process, helping businesses get work done quicker. Harness automation to work at peak efficiency, eliminate bottlenecks and give staff more time to focus on the big picture, not time-consuming menial tasks.

Use FileBound to electronically send documents such as applications, requests, and vendor invoices to anyone who needs to approve them according to business rules.

Route documents

Set up workflows to help your business run smoother. Send documents to appropriate staff for review or batch send requests to be approved one by one or simultaneously from any device.

Eliminate tedium

FileBound takes care of tedious details and processes like checklists, endlessly searching for missing documents, and data validation. Additionally, reduce missed opportunities while giving your staff the resources they need to complete important processes faster and with less effort.

Enforce compliance

Reduce the risk of human error resulting in lost, misplaced, or stalled documents by eliminating the need to route paper files or track confusing email threads.

FileBound helps organizations ensure compliance with business rules and regulatory requirements while providing documentation that all guidelines were followed.

Get more done

FileBound gives your employees the resources they need to easily and securely access information from anywhere. Increase your business agility with user-friendly technology, reducing reliance on IT departments.

Additionally, use FileBound's complementary features such as electronic forms and analytics to accelerate processes and avoid bottlenecks.

Integrations to help you get work done.

CRM

- MS Dynamics
- Salesforce

Human Resources Management

- HRPyramid
- Skyward
- Ultipro

Enterprise

- Dell Boomi
- Winform Fields
- HTML Extraction
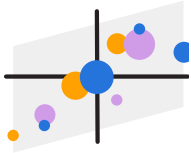
Financial Systems and ERPs

- Concur
- Intacct
- MS Dynamics Great Plains
- Abila MIP Accounting
- Microsoft Dynamics
- NetSuite
- QuickBooks

Student Information Systems (SIS)

- Skyward
- PowerSchool

Eliminate time-consuming paperwork

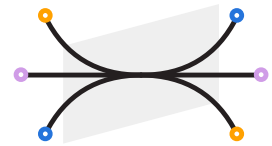FileBound helps teams streamline and automate workflows, helping everyone get more work done.

Analytics make the data you have work for you

Get a real-time look at tasks and projects and use analytics to define benchmarks, discover areas for improvement, and raise productivity.

Fast adoption and a user-friendly experience

Easy to set up with little to no training required. Intuitive, logical end-user experience makes interacting with the system a breeze.

Flexible integrations for the content you need

Eliminate data silos with our comprehensive integration platform and API capabilities that allow you to connect to common business systems.

Ready to get things done?

Let us show you what Upland FileBound can do.

Request a Demo

Upland FileBound delivers document and workflow automation applications that improve the operation of any organization by connecting users with the information they need to work more efficiently and effectively. With FileBound, customers can build automated workflow processes and centrally manage documents to improve compliance, collaboration, and access to information.