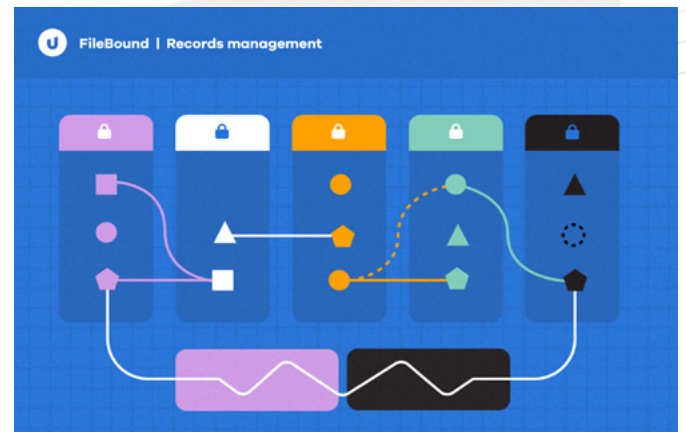


Conquer records management with automation

From onboarding new hires to flawlessly maintaining records to support compliance or legal claims, FileBound makes records management a breeze.



FileBound takes the complexity out of records management and compliance.



Make managing your documents easier.

Easily locate records, create rules for routing and retention, and secure them with permissioned administrator rights.

- Access system-wide information about content, users, projects and activities with a user-friendly, customizable dashboard view

- Schedule automated alerts to approve destruction of records at end of their lifecycles to avoid potential liability



Ensure audit-readiness and compliance.

Create retention rules and workflows to make sure all the right boxes are checked, every step of the way.

- Ensure all records are meet internal and external requirements and provide proof that policies and procedures were followed

- Provide a full audit trail and reporting on all records and associated actions to prove their validity and integrity to demonstrate compliance

Build it, customize it, and work faster

FileBound tackles records management by creating an end-to-end automated process that assembles information for access from one centralized interface.

Human Resources

- Create comprehensive personnel files to securely house all information
- Oversee the consistent use, access, and destruction of records as needed
- Ensure all records are retained according to internal or external compliance policies

Accounts Payable

- Integrate with ERP systems to standardize processes and provide secure access to data across locations
- Create comprehensive vendor files with complete documentation
- Easily scale to full business processing with FileBound Workflow Automation capabilities



Contracts Management

- Integrate with your CRM to easily access items such as NDAs, MSAs, or SOWs
- Access and review documents from any device, any time
- Ensure all the regulatory boxes are checked for compliance purposes

Compliance Audits

- Create actions for records that are ready for final disposition to be automatically destroyed or sent to a reviewer for approval
- Deliver reports on legal holds, record destruction, record declaration, and disposition approval, as well as standard FileBound reports that track actions involving records
- Leverage robust workflow capabilities to declare records and send notifications of record destruction

Harness automation to work smarter, not harder

Let the software do the heavy lifting by ensuring reliable and secure access to business-critical documents.

Improve response times

Improve the ability to respond fully and reliably to annual audits, legal action, and other requests that require tamper-proof evidence. Grant auditors temporary access to the system to streamline audits even further.

Eliminate manual errors

Reduce the likelihood of human error by automating classification, retention rules, and disposition. Set action alerts for tasks down the road. Eliminate manual work to give staff back time to work on more high-value tasks.

Minimize screen bouncing

Give your staff a better work experience and save them time by allowing them to manage all records in the familiar FileBound interface rather than flipping between multiple applications or systems.



As regulations and complexities continue to mount in our industry, we have to look at ways to ensure compliance, while reducing labor-hours associated with manual audits and processes. Upland allows us to do that.

Director of Human Resources
US-based Fruit Farming Company

[Read full case study →](#)



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.

