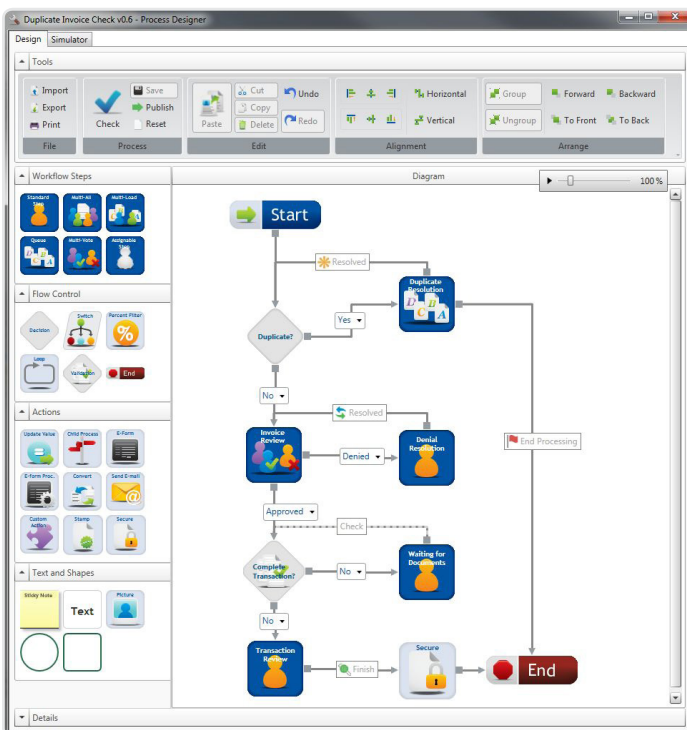## Document & Workflow Automation

Workflow Automation Designed for the Business User

Most knowledge workers spend far too much of their workdays performing mundane, yet time-consuming tasks that add little value to the business.

Upland's FileBound manages activities like routing documents, verifying data or following up on stalled processes and automates business rules, so employee can focus on work that really matters.

Using standard templates and drag-and-drop design tools, non-technical FileBound users can quickly create and publish forms.

Organizations around the world use FileBound Workflow to automate multiple applications do the work they need to do from vendor invoice processing to application review and approval contract management and much more. Eliminating manual, paper-based processes lets these companies:

- **Automate approval processes** by electronically sending documents (e.g., applications, requests or invoices) to everyone who needs to approve them according to business rules (e.g., department, manager or invoice amount)

- **Route documents** to anyone who needs to review, act on or respond to them, regardless of their location, either one-by-one or simultaneously

- **Remove tedious steps in a process**, such as creating checklists, checking for a missing document, validating data or sending reminders to ensure that processes continue to move forward with minimal manual effort

- **Enforce compliance** with business rules and/or regulatory requirements and provide documentation that all guidelines were followed

- **Enable employess to participate** in business processes, regardless of their location or device, so work gets done faster with less risk of lost documents
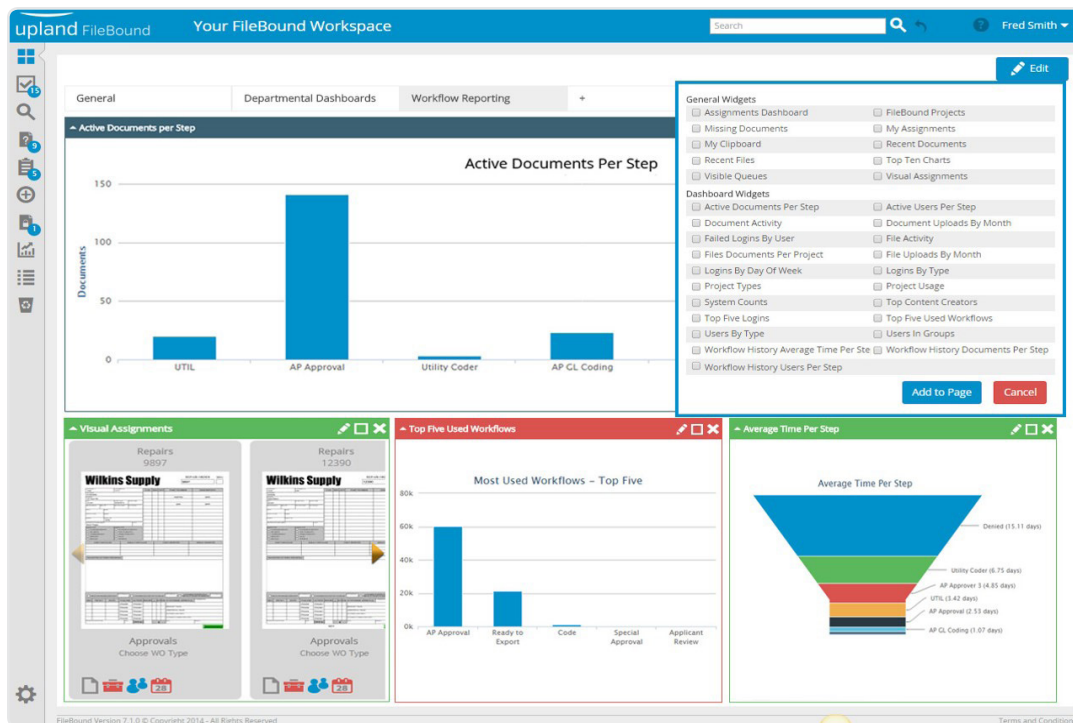
Benefits of FileBound Workflow

- **Empower every employee** to work at peak efficiency to eliminate bottlenecks and hold the line on new hiring

- **Reduce missed opportunities** and customer frustration by completing important processes faster

- **Demonstrate accountability** to executives and regulators with immediate access to individual productivity and process integrity through workflow logs and configurable dashboards

- **Reduce the risk of human error** that results in lost, misplaced or stalled documents by eliminating the need to route and track paper-based files or track confusing email threads

- **Avoid stalled processes** and manual tracking/reminders by automatically notifying a manager or co-worker when a task has reached an escalation point

Features

- **Ease-of-use requires less training** than other products and increases agility by enabling business users to make modifications as needs change, reducing reliance on IT

- **Process simulator makes it easy** to test workflow steps and scenarios without leaving the process designer

- **Device-agnostic access** supports BYOD policies and allows users to securely access FileBound whenever and wherever they want

- **Flexible, straightforward licensing** options make it practical and affordable to extend workflow processes to users throughout the enterprise

Learn more about FileBound Workflow, who's using it and complementary functionality like E-forms and Analytics at **filebound.com**.

FileBound lets users decide what aspects of a workflow process they want to monitor and then easily create configurable dashboards without IT resources.

About Upland Software

Upland is a leading provider of cloud-based enterprise work management software. With more than 1,600 enterprise customers around the globe, and over 225,000 users, Upland helps teams in IT, marketing, finance, professional services and process excellence run their operations smoothly, adapt to change quickly and achieve better results every day. Contact us at 855-944-7526 or info@uplandsoftware.com.

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