FileBound
by upland

Document & Workflow Automation

Create Electronic Forms in Minutes

Upland's FileBound document and workflow automation software helps organizations focus on the work that really matters by eliminating manual paper-based processes. Many organizations that use FileBound find that electronic forms empower them to eliminate even more paper and expand the value of their FileBound systems to new processes.

Using drag-and-drop design tools, business users can quickly create the forms they need and share them with internal users or with the world. Users have the convenience of quickly filling out an online form and uploading supporting documents. Once the form is completed, it can be imported into FileBound immediately to trigger workflow processes faster and without the need to scan documents.

The possibilities for using FileBound E-forms are practically endless. Customers have designed forms for everything from allowing employees to request time off to enabling college students to drop or add classes to gathering online applications from potential employees. E-forms help these organizations:

- **Capture requests and automatically route them** to the right person or automated process, reducing time spent handling paper forms or tracking down emails

- **Gather information of virtually any kind** with less impact on staff by allowing the user to complete the form and add any additional information, such as documents associated to an application, insurance verification or receipts

- **Replace paper forms** (even forms that require signatures) that can become outdated, waste resources and take longer to process that electronic requests

- **Provide virtually anyone with the ability** to submit forms and documentation anytime, anywhere using any device they choose

Upland's 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.

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

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Benefits of FileBound E-forms

- Improves service to internal and external customers by reducing the time it takes to route and act on requests

- Allows business owners to quickly create or modify forms to meet business needs

- Saves time spent handling paper forms or trying to manually track requests via email

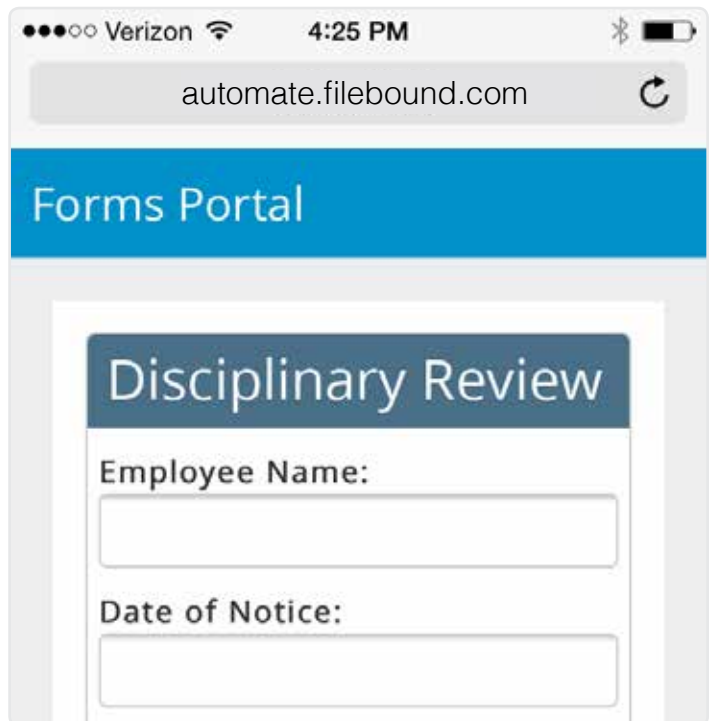- Eliminates the risk that a form will be misplaced or overlooked

Features

- Capture signatures using a mouse or other signature capture device

- Supports creation of complex HTML forms for advanced designers

- Included in the standard FileBound Enterprise Edition with no usage limits

- Routes forms and/or attachments via workflow

- Includes basic templates that can be re-used or modified and allows designers to create their own templates to enforce internal branding standards

- Limit access to forms using FileBound passwords or usage codes

- Choose between standard forms and adaptable forms that optimize viewing on mobile devices

When used in conjunction with FileBound Workflow (also included in the FileBound Enterprise Edition), E-forms can drive game-changing productivity. Details at **filebound.com**.
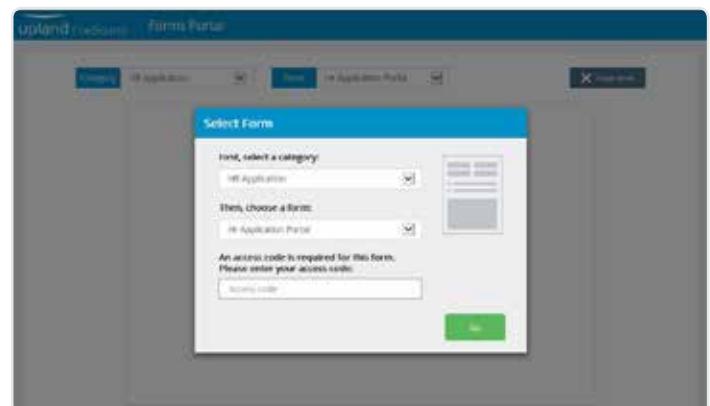
Mobile Forms

FileBound's E-form Designer includes options for creating forms that adapt to mobile devices of all kinds.

Controlled Access

Access codes can be used to limit access to certain forms so that they are only completed by authorized users.

About Upland Software

Upland Software (Nasdaq: UPLD) is a leading provider of cloud-based Enterprise Work Management software. Our family of applications enables users to manage their projects, professional workforce and IT investments, automate document-intensive business processes and effectively engage with their customers, prospects and community via the web and mobile technologies. With more than 1,600 customers and over 225,000 users around the world, Upland Software solutions help customers run their operations smoothly, adapt to change quickly, and achieve better results every day. Learn more at uplandsoftware.com.

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