

FileBound Connect

FileBound Connect anticipates and intelligently delivers content relevant to a user's needs, eliminating the tedious process of searching to retrieve related content. Our clean design and out-of-the-box integrations transform the way users connect to their every day line of business applications.



Content Delivery

Connect works with business applications to anticipate what content complements the application and automatically delivers it straight to their fingertips.



Instant Notifications

Users are notified of assignments the moment they are received. One-click takes the user directly into Connect to move through the approval process.



Drag and Drop

Add content to FileBound simply by dropping it into the file — Connect does the rest. Customizable folders provide an intuitive design anyone in an organization can follow.

Integrate with Every Day Applications



From ERPs, to CRMs, accounting systems, and more — the number of applications employees navigate daily is cumbersome. FileBound Connect is the bridge between these systems and the content that supports them, enabling users to access relevant content while in their primary application. By empowering employees with the content and data they need, Connect helps users make intelligent business decisions.

Adoption is Key



Usability and functionality are the catalysts behind which users choose to adopt or ignore and, ultimately, why initiatives succeed or fail. With Connect, the adoption is painless — in large part because it anticipates the needs of the users and provides them with content specific to their projects and tasks. The result is an organization's successful growth in knowledge and information storage and exchange.

Key Features

Document & Records Management

- + Instantly notifies users of content and assignments.
- + Customizable folder structures based on the user's profile.
- + Drag-and-drop content directly into a destination folder.
- + Send emails directly from FileBound with files as attachments.
- + Thorough audit trail & reporting for records retention.

View, Annotate, and Preserve

- + All digital text, even from image files, becomes part of your searchable database.
- + Optical Character Recognition (OCR) functionality with superior accuracy.
- + Full annotation set: shapes, sticky notes, stamps, highlights, text, and redaction controls can permanently become part of an image file.
- + Redact entire sections or a single word in documents.
- + Version control ensures access to the most up to date information and provides a complete history of changes.
- + Digital signatures validate against a secure server; choice of text stamps or image-based signatures.

Security & Compliance

- + Secure archive that supports federal and state regulatory compliance.
- + Granular user and group permissions controls make sensitive information accessible only by authorized personnel.

Benefits

- Out-of-the-box integration with key line of business applications.
- Ease of use: thorough adoption with minimal learning curve.
- Complements and adapts to existing business processes.
- Improved staff productivity, efficiency, and responsiveness.
- Built-in controls that facilitate regulatory compliance and mitigate business and legal risk.

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 2,500 customers and over 250,000 users around the world, Upland Software solutions help customers run their operations smoothly, adapt to change quickly, and achieve better results every day.