

# Uplevl for Document Management

Uplevl provides a robust document management solution. With a cloud platform, comprehensive features, and unlimited storage, Uplevl is the premier solution for document management for businesses.

Talk To Us

## The Challenges of Document Management

### Storage

Physical storage of documents takes up valuable space that could be used for other purposes

### Version Control

Not knowing which document is the most up-to-date causes confusion and slow-downs

### Integrations

A document management system that isn't well integrated causes dual data entry and decision-making without visibility of documents

## The Uplevl Solution

With Uplevl you can store all documents in one place and access them from almost anywhere with our cloud-based platform. Find exactly what you're looking for with our powerful and easy-to-use search capability and track versions and revisions automatically.

Plus, enjoy flexible workflow capabilities, which will automatically route documents for review and approval based on pre-set rules.

## Organize Your Documents

Uplevl's simple-to-use folder structure makes it easy to organize your documents in a way that makes the most sense for your business so you can spend less time looking for a document and more time actually working on it. Along with tagging, meta-data, and automated workflow routing, your documents are easy to find and process.

- ✓ Manage, control and monitor the review process.
- ✓ Easily find what you need when you need it.
- ✓ Continually improve processes.
- ✓ Increase ROI with more streamlined approval workflows.





## Easily Integrate with Your Business Applications

Uplevel integrates with Acumatica, Intacct and NetSuite and has an available API, which allows you to create an integration with almost any other system. No more toggling between different softwares or trying to remember where something is stored - with automated integration you can maintain a single source document in Uplevel while easily accessing it from other applications.

- ✓ Enhance your accounting, ERP, HR and other business processes.
- ✓ Easily move data between the Uplevel platform and your business applications.
- ✓ Save time by eliminating dual entry.
- ✓ Improve productivity.

## Benefits of Document Management

A document management system eliminates manual, time-consuming tasks and frees you and your team up to work on real value-add activities. It also ensures tighter controls, better auditing, added security, and eliminates costs associated with paper-based processes.



Version Control



Check In and Check Out



Annotate



Microsoft Office Integration



Workflow Routing



Search

## Secure, Cloud-Based Platform

Have peace of mind knowing your documents are securely stored and hosted by AWS with multiple backups and redundancies. Uplevl is HIPAA Compliant and provides strong security at the datacenter, network, data and application level.

- ✓ HIPAA Compliant software.
- ✓ Storage and data encryption.
- ✓ Multi-factor authentication.
- ✓ Fine-grained access and privilege control for folders, workflows and documents.



## Real-Time Business Intelligence

Measure and track your business processes in real time. Identify trends and opportunities for improvement through visualization tools.

- ✓ Identify what's most outstanding and needs attention.
- ✓ Analyze your processes in real time.
- ✓ Make informed business decisions based on the most up-to-date information.
- ✓ No special training needed to use visualization tools.

 50%

Of knowledge workers' time spent creating and preparing documents.

 21%

Amount of productivity lost due to document management challenges.

 80%

Potential amount that you can reduce your document management costs by using the

## Affordable & Quick ROI

Low-priced monthly, quarterly and annual pricing plans. Fast implementation and effective automation of manual data entry and other manual ad hoc processes.

- ✓ Implementation in just two weeks.
- ✓ Simple, clear subscription cost with no hidden fees.
- ✓ Easy to implement and use.
- ✓ Flexible payment plans.

