Accounts Payable Information Management Checklist

If it's time to make your AP content strategy more customer-centric, here are a few things to look for in a new or replacement system.

	FileBound	Vendor #2	Vendor #3
An interface that doesn't require extensive training.	✓		
The ability to quickly create new forms and workflows and add new users and projects.	✓		
Allows people to work when, where, and how they choose.	✓		
Integration with other systems so that users may access documents through the software they are currently using, eliminating disruption.	✓		
Creates a consolidated vendor record with documents of any kind (PDF, e-forms, Word) including purchase orders, vendor invoices, check requests and payments, without changing the format of those documents.	✓		
Allows users to track and collaborate on approvals, grants document access depending on need and user role, and stores multiple versions for simple retrieval.	✓		
Enhances ability to adhere to internal policies and external compliance mandates (like Sarbanes-Oxley) with clearly defined workflow trails, intuitive storage of every version of every document, and permissions-based access to records, anytime from anywhere.	✓		
Tools that empower business users to modify automated workflows, create e-forms, add users, or perform other tasks on the fly.	✓		
Predictive analytics capabilities that allow you to predict the effect on cash flows to any point in your payment cycle.	✓		
Allows systems to create their unique, customized dashboard view for quick viewing of projects, files and documents via widgets.	✓		
A licensing model that supports engagement by not restricting the number of users.	✓		
Cloud facilities that have been audited by an impartial organization.	✓		

About Upland Software

Upland Software (Nasdaq: UPLD) is an enterprise cloud software company that provides award-winning solutions in Project and IT Management, Workflow Automation and Digital Engagement. Our goal is 100% customer success, achieved through a unified operating platform that delivers the performance, scalability and support that over 2,500 Upland customers worldwide demand every day.