

## Document & Workflow Automation for Auto Dealerships

# Lower dealership costs, improve responsiveness by taking control of document-driven processes

As manufacturer requirements, regulatory mandates and price pressures increase, auto dealers find it more difficult to maintain profitability and high service levels. Upland's FileBound helps dealers get control of paper documents and manual processes that increase costs and prevent maximum efficiency.

Auto dealerships across the country use FileBound to digitize deal jackets, repair orders, parts tickets, accounts payable invoices, human resources (HR) documents and more and then automate processes associated with them. These dealerships are able to increase efficiency, improve responsiveness to customers and manufacturers and hold the line on costs by eliminating manual paper-based processes. For authorized users, documents are immediately available from any location, or even a mobile device, while being protected from unauthorized viewing, loss or unforeseen disasters.

## Benefits

- Lowers operating costs across sales, parts & service, accounts payable, human resources and more to offset rising costs and price pressure
- Eases compliance with manufacturers' audits and other compliance requirements to provide documents and/or audit trails proving all protocols were followed
- Automates processes such as approvals or requests by routing them electronically
- Increases efficiency and productivity to support growth without increasing staff
- Eliminates the space and time spent storing and retrieving paper documents
- Meets customer demand for less-hassle sales processes by providing immediate access to recent credit applications, documentation of the terms of a previous purchase or other information that can streamline the customer experience
- Role-based user rights make it easy to provide access to the information users need while protecting sensitive documents such as customer credit applications and employee HR files, even across multiple rooftops
- Integrates with most dealer management systems (DMSs), but allows dealerships to control how documents are automatically classified and stored without being tied to a DMS that no longer meets the company's needs

*"FileBound has been an easy decision and a win-win. The car business has become complicated enough. At least this is one thing that makes it easier."*

— **George Huffman, dealer**  
**Pearl Motor Company**

### The Upland Product Family



*Automating the flow of work, connecting people through technology and bringing visibility to all aspects of the organization.*

Our family of products helps teams run their operations smoothly, adapt to change quickly and achieve more every day. Each product is built with a specific need in mind. See what you can do with Upland.



See how FileBound delivers game-changing results across the enterprise. Contact Select Imaging at [913-747-2700](tel:913-747-2700) or [support@selectimagingcorp.com](mailto:support@selectimagingcorp.com).

## Easy-to-Use Search and Retrieval

Regardless of whether they began as paper, email, a PDF report or virtually any other format, once documents are in the FileBound system, employees can find the information they need in seconds using the terms that are already part of the business process.

The screenshot displays the FileBound Document Viewer interface. The main window shows a scanned document titled "MOTOR VEHICLE PURCHASE CONTRACT". The contract details include:

- DEALER NAME: FileBound Motors
- ADDRESS: 700 Rayovac Dr. Madison, WI 53711
- TELEPHONE NO.: 608-279-4088
- PROSPECTIVE PURCHASER (YOU) NAME(S): ANGELA R NICHOLSON
- PROSPECTIVE PURCHASER STREET ADDRESS: 123 MAIN ST.
- RESIDENCE PHONE: (508) 555-1212
- CELL PHONE: [Blank]
- BUSINESS PHONE: [Blank]
- RESIDENCE COUNTY: DANE
- RESIDENCE CITY: STOUT

The contract also includes a table for vehicle specifications:

PURCHASED VEHICLE	MODEL YEAR	MAKE - TRADE NAME	MODEL	BODY TYPE
2008	GMC	YUKON	UT	

Additional contract details include "ORDERED COLOR: RED", "ORDERED TRIM", and "ORDERED ENGINE". A "Project Search Criteria" overlay is visible on the right, showing search filters for "Project: FIN - Deal Jackets", "Last Name / Bus. Name: Nicholson", "First Name: Angela", "Stock Number: 38828", "Delivery Date", "Scan Date", and "Store Number: 2".

## Intuitive Interface

Files of virtually any kind can be classified and organized in the way that best meets the needs of the dealership and its employees for quick and easy retrieval.

The screenshot shows the Upland FileBound software interface. The search results table is as follows:

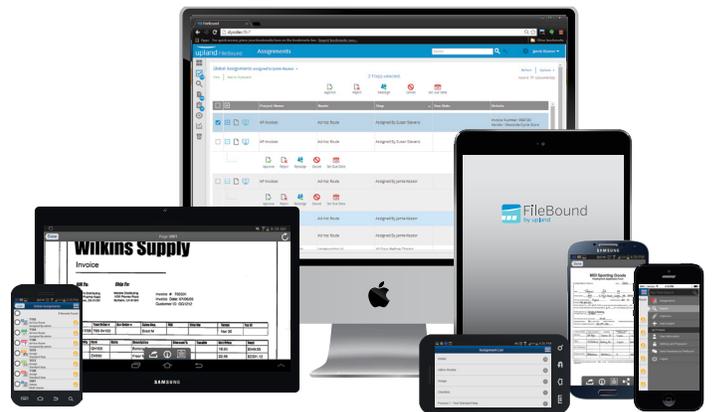
ID Number	URL	Customer Number	Customer Name	Store Number	Scan Date
6011300	564CE3D48242099	6542	FERRICK FERRIS	1	10/18/2014
6011378	162CE4F00253468	5783	BEGGS, EDGIE & GAL	1	10/18/2014
6011281	16A0713E74422752	6877	INVENTORY - 26478	1	10/18/2014
6011280	26718C02A18129252	1543	PAULSON, RONNIE	1	10/18/2014
5544515	30A0A1AC208407021	28069	HUGHES, CHRISTOPHER B	2	10/18/2014
5544610	8008059C2AF181512	81112	PAULSON, LEE D	2	10/18/2014
554474	70A8F931999400187	91025	MC MANAMY, LINDSEAL	2	10/18/2014
554457	17A0C1A1010001866	73226	KLUNCK, JAMES M	2	10/18/2014

## About FileBound

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. With FileBound, customers can build automated workflow processes and centrally manage documents to improve compliance, collaboration and access to information.

## Mobile Support

Support BYOD with a superior user experience, however and wherever you want to access FileBound, including apps for Android and iOS.



## About Upland Software

Upland is a leading provider of cloud-based Enterprise Work Management software. With more than 1,600 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.