

## 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 product is clean and intuitive. After we bought FileBound, three of us went in for training and left less than an hour later — it was so simple."*

Keith Dey, IT Manager

*"Previously finding the right file was a frustrating, time consuming process. FileBound has made this process simpler and cut our search time by more than half."*

Michael Sivadon, Senior Analyst

## 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 application. The main window shows a scanned document titled "MOTOR VEHICLE PURCHASE CONTRACT". The document includes fields for Dealer Name (FileBound Motors), Address (700 Rayovac Dr., Madison, WI 53711), Telephone (608-279-4088), and Prospective Purchaser (ANGELA R NICHOLSON, 123 MAIN ST.). It also lists vehicle details: 2008 GMC YUKON, LIT, with a red color and used status. A "Project Search Criteria" panel is overlaid on the right, with fields for Project (FIN - Deal Jackets), Last Name / Bus. Name (Nicholson), First Name (Angela), Stock Number (38828), Delivery Date, Scan Date, and Store Number (2). A "Search" button is visible at the bottom of the panel.

### 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 FileBound software interface with a search results table. The table has columns for ID Number, VIN, Customer Number, Customer Name, Store Number, and Scan Date. The data is as follows:

ID Number	VIN	Customer Number	Customer Name	Store Number	Scan Date
4011300	3GAKY7C282242939	6342	PERINCE, FAYNE	1	11/19/2014
4011378	1G2CY1402224488	5388	BRIGGS, JUDITH & GAIL	1	11/19/2014
4011381	1G2DT1574242702	6872	WINTERSON, BOB	1	11/19/2014
4011385	2G1W928181103572	1343	PAULSON, ROBBIE	1	11/19/2014
334615	3FAKRL1288237231	2859	HUGHES, CHRISTOPHER B	2	10/30/2014
334670	WVAW1P3C1P18177	81132	KAUCHER, LEE D	2	10/30/2014
334674	2H95F1984220787	81055	MC NEAMARY, JENNIFER L	2	10/30/2014
334677	1H4WCK7A100581864	7326	KOLNICK, JAMES M	2	10/30/2014

### About FileBound Software

FileBound is developed in the USA by Upland Software [a leading provider of cloud-based enterprise work management software]. FileBound is distributed in the Asia Pacific region by FileBound Solutions through a network of premium solutions partners.

### Mobile Support

Support BYOD with a superior user experience, however and wherever you want to access FileBound.

