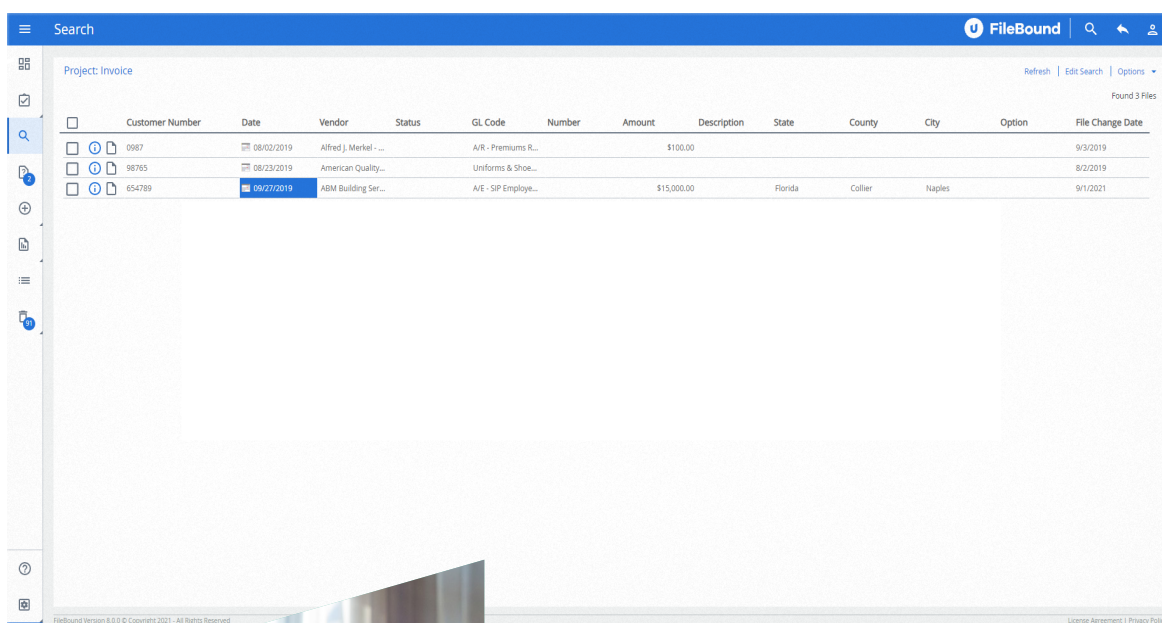


# What's New in FileBound 8.0

## Here's a brief overview



Released in October 2021, FileBound 8.0 is one of our most significant product releases to date, addressing ease of use, customer-requested enhancements, configuration flexibility, and overall performance that will help mold the future of FileBound. FileBound 8.0 features our new user-friendly, intuitive interface (see example below). Other key areas of focus have been how FileBound handles data, which is reflected through updates to projects, security, search, and numeric fields. Keeping in mind extensibility and new ways to use the product, updates to workflow, forms, and integrations have also been a major focus of development in this release.



The screenshot displays the FileBound 8.0 interface with a search results table for 'Project: Invoice'. The table has columns for Customer Number, Date, Vendor, Status, GL Code, Number, Amount, Description, State, County, City, Option, and File Change Date. Three rows of data are visible, with the third row highlighted. The interface includes a search bar, a sidebar with navigation icons, and a footer with version information and legal links.

Customer Number	Date	Vendor	Status	GL Code	Number	Amount	Description	State	County	City	Option	File Change Date
0987	08/02/2019	Alfred J. Merkel - ...		A/R - Premiums R...		\$100.00						9/3/2019
98765	08/23/2019	American Quality...		Uniforms & Shoe...								8/2/2019
654789	08/27/2019	ABM Building Ser...		A/E - SP Employee...		\$15,000.00		Florida	Collier	Naples		9/1/2021



### Project Settings

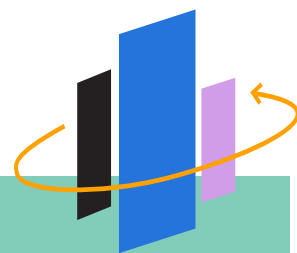
- Use a custom Electronic Form to replace the default option on the "Add Content" page
- Rename Documents on Export
- Option to require Dividers and Separators

### Security Updates

- Option to open only one file in each viewer tab or window

### Search Updates

- Toggle project level option to default search terms like "starts with," "contains," or "exact"



**FileBound was key  
for us in moving to  
a more automated,  
paperless environment.**

Lisa Wagnon  
Administrative Management  
*Volunteers of America  
Southeast Louisiana*

## More Updates

### e-Signature

- Access HelloSign from document viewer to easily capture legally binding e-Signatures online

### Numeric Field

- Configure numeric formats
- Populate a numeric field using live calculations

### Web Viewer

- Drag-and-drop file creation
- Document grouping, one of the most highly asked for features, allows users to combine multi-page tiff documents into a single "item" in the web viewer tree view

### Workflow

- Checklist configuration consolidation
- User assignment based on lookups
- Improved logging for errors and actions
- Anonymous form stencil
- Expanded user permissions for Workflow Assignment Manager

### Forms

- Anonymous forms
- Additional form links
- In-progress and completed save states
- Form versioning and form version history
- Option to create upload limitations

### Connect 7.0

- New Web Form menu
- Bulk document export
- FileBound Drive can now generate and edit structured forms
- Viewer opens to selected divider or separator

### Integrations / FileBound Importer

- Active Directory sync selection
- Active Directory sync automation
- Update users via CSV
- InterFAX Support

**Need more info?** Visit the Community to access the FileBound 8.0 New Features Guide, which gives a full listing of all the updates available with FileBound 8.0. Have questions? Reach out to the team anytime at [filebound@uplandsoftware.com](mailto:filebound@uplandsoftware.com).



**FileBound**