



## Case Study: Uplevl Improves Document Management with PrizmDoc Viewer

Document management solutions help large and small businesses to electronically transfer data quickly, collaborate with other teammates, and automate approval processes. Digital data capture and data management help end-users become more productive and effective.

### Overview:

Uplevl, an intelligent document management software solution, enables a variety of third party, small businesses to capture data, manage workflow processes, and gather relevant business intelligence. Uplevl streamlines manual paper processes by gathering data from documents that are scanned, emailed, or uploaded into the system, storing that data in a secure, cloud-based platform.

In 2008, Uplevl decided to move its internal computer system to the cloud for greater reliability, flexibility, and security. PrizmDoc Viewer is integrated into the Uplevl platform to help users approve and revise documents once the content is retrieved.

**“ At the end of the day, PrizmDoc Viewer is what we’re relying on. People want to be able to see their documents quickly. All of our customers depend on this service. ”**

Lance Raymond,  
Chief Technology Officer, Uplevl

### Challenges:

When Uplevl moved its network to the cloud, the system engineers knew they needed a robust document viewer to complete their service offering. “Our customers want to see what they have in storage quickly and easily. That means a comprehensive, reliable, and robust document viewer would be an essential ingredient,” reports Mark Landis, Chairman of Uplevl.

Uplevl uses two servers for development and production and four core CPUs. The team wanted a solution that would provide their clients with document viewing and collaboration capabilities, but they didn’t know where to start.

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## Challenges Continued:

They needed to overcome the following challenges:

- **Create a custom-viewer with features and functions that are secure and efficient or find a product that encompasses these qualities within their budget**
- **Enable their clients to view a variety of different file types in the same platform**
- **Empower customers to make annotations inside the documents they find in Uplevl's storage to collaborate more efficiently**

After weeks of testing, PrizmDoc Viewer quickly rose to the surface as the product of choice. The engineers soon realized that developing internal code to create a document viewer with the same security and functionality as PrizmDoc Viewer would end up costing much more time and money.

"I got the entire network moved over to the cloud and we started testing different options for document viewing. It was a month long process, but once PrizmDoc Viewer was chosen and implemented, we left it alone. It just worked," said Lance Raymond, Chief Technology Officer at Uplevl.

## Results:

After integrating PrizmDoc Viewer into the Uplevl software, DataFlow Technologies knew they made the right decision. "At the end of the day, we were spending a lot of money on licensing for different things we didn't need. This is a true testament to your product because we focus solely on core needs. We needed a viewer, and PrizmDoc Viewer has since become a cornerstone of Uplevl. It's there; it's solid; it works," emphasizes Landis.

PrizmDoc Viewer is integrated into Uplevl's offering, enabling users to efficiently view and collaborate on documents in their repository. "Utilizing the annotation feature of PrizmDoc, users are able to highlight and draw directly on the documents pointing out key information. That process resulted in faster approval times through our workflow process because managers had quick access to key data." said Raymond.

PrizmDoc Viewer enhanced the value of Uplevl's offering by providing its customers with a secure way to view and collaborate on documents. Working together, Accusoft helped Uplevl solve its document viewing challenges. Learn how PrizmDoc Viewer can help solve yours too.

**Discover how PrizmDoc Viewer can help your business succeed.**

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### About Uplevl

Uplevl (a successor to Docassist, founded in 2002) was one of the first document management cloud-based, subscription services. Since then, Uplevl has expanded its business process automation offerings, providing leading solutions for AP automation, AR automation, and contract management. Uplevl continues to be a leader in providing practical software solutions for mid-sized businesses in tech, healthcare, fitness, property management, restaurants, and other businesses and nonprofits.

### About Accusoft

Accusoft is a software development company specializing in content processing, conversion and automation solutions. From out-of-the-box and configurable applications to APIs built for developers, we help organizations solve their most complex content workflow challenges. Our patented solutions enable users to gain insight from content in any format, on any device with greater efficiency, flexibility, and security.

