



Features Comparison	UPExchange Business	UPEnterprise
Delivery Options		
● SaaS Delivery via the Cloud	✓	✓
● API Integration Capability		✓
Holder Maintenance		
● Company Setup	✓	✓
● State Exemptions	✓	✓
● Custom Fields	✓	✓
● Create Custom Exemptions		✓
● Multiple Company Setup		✓
● Group Setup - By Company or Business Unit		✓
Property Maintenance		
● Import/Manually Add Records	✓	✓
● Mass Update Capability	✓	✓
● Audit Trail	✓	✓
● Download for Internal Custom Reporting	✓	✓
● Attachments	✓	✓
● Multi-Company Import Template		✓
● Custom Mapping - Upload, Modify, Delete Records Using UPTools		✓
● Source-to-Source Integrations		✓
● Activity Tracking - Record Notes, Calls, Tasks, and Attachments		✓
● Advanced Report Filters for Data Mining		✓
Due Diligence		
● Create Standard Due Diligence Letter	✓	✓
● Create Custom Due Diligence Letter		✓
● Populate Due Diligence Date	✓	✓
● Apply Standard State Thresholds/Dormancy	✓	✓
● Ability to Customize Due Diligence Thresholds	✓	✓
● Saved Copy of Letters to Library	✓	✓
● Customize Letters Dashboard		✓
● QR Code Scan and Report for Mass Updating Due Diligence Responses		✓
● Includes New York Advertising Functionality		✓

Features Comparison	UPExchange Business	UPEnterprise
State Reports		
● Produce State Specific Report(s)	✓	✓
● Process Multiple State Files Simultaneously		✓
● Coversheet Pre-Populated	✓	✓
● Internal Report	✓	✓
● Online Submission (if applicable)	✓	✓
● Copies of State Required Output Files Retained in Client Library	✓	✓
● State Online Filing Website (if applicable)	✓	✓
● Multi-Company Consolidated Reports		✓
● Concurrent Reporting - Automatically Report Multiple Companies All At Once		✓
● Complete Remit Instructions Along with State Required Output Files	✓	✓
User Maintenance		
● Add Multiple Users	✓	✓
● Basic Security Level Assignment	✓	✓
● Role Based Security		✓
● Limit Access to Specific Companies	✓	✓
● Separate Security Control Panel		✓
● Grant User Level Access to Groups		✓
Data Utilities		
● Archive Records	✓	✓
● Undo State Reports	✓	✓
● Delete Property Imports	✓	✓
Resources		
● State Map	✓	✓
● Property Codes	✓	✓
● Relationship Codes	✓	✓
● General Information	✓	✓
Additional Features		
● Compliance Calendar and Alerts	✓	✓
● Multiple Options to Access Client Support	✓	✓
● Client Library - Data Repository of All State Reports & Due Diligence Letters Generated	✓	✓
● Full Audit Trail Reporting (UPEnterprise Only)		✓
● UPTools - Dormancy Calculation		✓

Contact your Account Executive for Pricing Information