



| Features Comparison | UPExchange Business | UPEnterprise |
|---|---------------------|--------------|
| Delivery Options | | |
| ● SaaS Delivery via the Cloud | ✓ | ✓ |
| ● Flexible Deployment Options - Dedicated, Hybrid, and On-Premise | | ✓ |
| ● API Integration Capability | | ✓ |
| Holder Options | | |
| ● Setup Holder Information | ✓ | ✓ |
| ● State Exemptions | ✓ | ✓ |
| ● Custom Fields Exemptions | ✓ | ✓ |
| ● Online Claims Processing | ✓ | ✓ |
| ● Create Custom Exemptions | | ✓ |
| ● Group Import Template for Multiple Holder Setup | | ✓ |
| ● Group Setup | | ✓ |
| Property | | |
| ● 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 | | ✓ |
| ● Record Notes, Calls, Tasks | | ✓ |
| ● Advanced Report Filters | | ✓ |
| Due Diligence | | |
| ● Create Standard or Custom Letter | ✓ | ✓ |
| ● Add Date of Due Diligence to Property Record | ✓ | ✓ |
| ● Apply Standard State Thresholds/Dormancy | ✓ | ✓ |
| ● Ability to Customize Due Diligence Thresholds | | ✓ |
| ● Copy of Letter Saved to Library | ✓ | ✓ |
| ● Create Custom Letter Templates | | ✓ |
| ● QR Code Scan for Mass Update RPOs | | ✓ |
| ● QR Code Scan for Mass Update Paid Owner/Hold from Report Status | | ✓ |
| ● QR Code Scan PDF Reports | | ✓ |
| ● Includes New York Advertising Requirements | | ✓ |

Contact your Account Executive for Pricing Information

| Features Comparison | UPExchange Business | UPEnterprise |
|--|---------------------|--------------|
| State Reports | | |
| ● Process Multiple State Files Simultaneously | | ✓ |
| ● Custom Coversheet Pre-Populated | ✓ | ✓ |
| ● Internal Report | ✓ | ✓ |
| ● Online Submission (if applicable) | ✓ | ✓ |
| ● Copy of Report/Coversheet Saved to Library | ✓ | ✓ |
| ● Multi-Company Consolidated Reports | | ✓ |
| ● Concurrent Reporting - Automatically Report Multiple Companies All At Once | | ✓ |
| ● Zipped file with all state report information data including what was reported, what still needs to be reported manually reporting, and what submission vouchers were submitted via online filing. | | ✓ |
| Users | | |
| ● Add Multiple Users | ✓ | ✓ |
| ● Basic Security Level Assignment | ✓ | ✓ |
| ● Role Based Security | | ✓ |
| ● Limit Access to Specific Holders | | ✓ |
| ● 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 | ✓ | ✓ |
| ● State Online Filing Website | | ✓ |
| ● NAUPA Links | ✓ | ✓ |
| Additional Features | | |
| ● Compliance Calendar | ✓ | ✓ |
| ● Compliance Alerts | ✓ | ✓ |
| ● Unlimited Email/Chat/Phone Support | ✓ | ✓ |
| ● Library - ShareFile contains State Reports & Due Diligence Letters | | ✓ |
| ● Audit Trail Report | ✓ | ✓ |
| ● Holder Audit Trail Report | | ✓ |
| ● UPTools - Dormancy Calculation | | ✓ |

Contact your Account Executive for Pricing Information