



Features Comparison	UPExchange Business	UPEnterprise
Delivery Options <ul style="list-style-type: none"> SaaS Delivery via the Cloud 	✓	✓
<ul style="list-style-type: none"> Flexible Deployment Options - Dedicated, Hybrid, and On-Premise 		✓
<ul style="list-style-type: none"> API Integration Capability 		✓
Holder Maintenance <ul style="list-style-type: none"> Company Setup 	✓	✓
<ul style="list-style-type: none"> State Exemptions 	✓	✓
<ul style="list-style-type: none"> Custom Fields 	✓	✓
<ul style="list-style-type: none"> Create Custom Exemptions 		✓
<ul style="list-style-type: none"> Multiple Company Setup 		✓
<ul style="list-style-type: none"> Group Setup - By Company or Business Unit 		✓
Property Maintenance <ul style="list-style-type: none"> Import/Manually Add Records 	✓	✓
<ul style="list-style-type: none"> Mass Update Capability 	✓	✓
<ul style="list-style-type: none"> Audit Trail 	✓	✓
<ul style="list-style-type: none"> Download for Internal Custom Reporting 	✓	✓
<ul style="list-style-type: none"> Attachments 	✓	✓
<ul style="list-style-type: none"> Multi-Company Import Template 		✓
<ul style="list-style-type: none"> Custom Mapping - Upload, Modify, Delete Records Using UPTools 		✓
<ul style="list-style-type: none"> Source-to-Source Integrations 		✓
<ul style="list-style-type: none"> Activity Tracking - Record Notes, Calls, Tasks, and Attachments 		✓
<ul style="list-style-type: none"> Advanced Report Filters for Data Mining 		✓
Due Diligence <ul style="list-style-type: none"> Create Standard Due Diligence Letter 	✓	✓
<ul style="list-style-type: none"> Create Custom Due Diligence Letter 		✓
<ul style="list-style-type: none"> Populate Due Diligence Date 	✓	✓
<ul style="list-style-type: none"> Apply Standard State Thresholds/Dormancy 	✓	✓
<ul style="list-style-type: none"> Ability to Customize Due Diligence Thresholds 	✓	✓
<ul style="list-style-type: none"> Saved Copy of Letters to Library 	✓	✓
<ul style="list-style-type: none"> Customize Letters Dashboard 		✓
<ul style="list-style-type: none"> QR Code Scan and Report for Mass Updating Due Diligence Responses 		✓
<ul style="list-style-type: none"> 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