



| Features Comparison | UPExchange Business | UPEnterprise |
|--|---------------------|--------------|
| <p>Delivery Options</p> <ul style="list-style-type: none"> ● SaaS Delivery via the Cloud ● SaaS (standard) Database & Application utilize MS Azure ● Dedicated - Database and Application utilize MS Azure, Customer Utilizes Dedicated Server ● Hybrid - Application resides in the MS Azure Environment, Data Resides Within Customer's Environment ● On-Premise - Both Database and Application Resides in Customer's Environment | <p>✓</p> | <p>✓</p> |
| <p>Holder Options</p> <ul style="list-style-type: none"> ● Setup Holder Information ● State Exemptions ● Custom Fields Exemptions ● Online Claims Processing ● Create Custom Exemptions ● Group Import Template for Multiple Holder Setup ● Group Setup | <p>✓</p> | <p>✓</p> |
| <p>Property</p> <ul style="list-style-type: none"> ● 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 | <p>✓</p> | <p>✓</p> |
| <p>Due Diligence</p> <ul style="list-style-type: none"> ● Create Standard or Custom Letter ● Add Date of Due Diligence to Property Record ● Apply State Thresholds/Dormancy ● Copy of Letter Saved to Library ● UPLetters ● QR Code Scan for Mass Update RPOs ● QR Code Scan for Mass Update Paid Owner/Hold from Report Status ● QR Code Scan PDF Reports | <p>✓</p> | <p>✓</p> |

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
- 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.

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Users

- Add Multiple Users
- Basic Security Level Assignment
- Role Based Security
- Limit Access to Specific Holders
- Separate Application
- Grant User Level Access to Groups
- MFA - Multi-Factor Authentication

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Data Utilities

- Archive Records
- Undo State Reports
- Delete Property Imports

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Resources

- State Map
- Property Codes
- Relationship Codes
- General Information
- State Online Filing Website
- NAUPA Links

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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

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