



# UpsideForms

## Custom, Definable Forms

### Solution Overview

UpsideForms provides users of the Upside Software product suite with the capability to define and configure rich, highly dynamic, custom forms using industry standard XML. Forms are rendered in a browser environment for fast, efficient, and accurate input by internal and/or external users.

UpsideForms allows users to define their own forms for data capture and integrates these forms with the contracting process from the issuance of an RFX through the creation of the contract and subsequently the invoicing against those contracts. UpsideForms also provides companies with the ability to automate their deal generation processes and allows for a streamlined sale-to-contract transaction.

The key strength of UpsideForms is the substantial flexibility it provides to organizations to capture very detailed information and utilize this information to make solid business decisions and calculations, as well as to perform analysis to ensure compliance and enforce accuracy.

Seamless integration with other world-class products from Upside Software – UpsideContract, UpsideBilling and UpsideRFX – simplifies the complexities of negotiating and pricing goods and services both from the buy-side and sell-side.

### High Powered Forms

#### Features

- Flexible, configurable forms for capturing key contract related information.
- Advanced calculation capabilities streamlines activities involving pricing, rebates, royalties, bids, deals, etc. during the contract lifecycle.
- Completely web-based and zero footprint—no plug-ins on the desktop.
- Seamless integration with the Upside Software product suite (UpsideContract, UpsideBilling and UpsideRFX) complements the contracting process.
- Forms created within UpsideForms can be associated with a particular contract type in UpsideContract.
- XML-based forms are rendered in a browser environment allowing users to enter data directly into the form online.
- Suppliers have the ability to enter their bid data into the form online through the secure external vendor portal provided by Upside Software.
- Robust forms engine processes pre-defined rules, validations, and calculations in response to data which is input by the user on the web form.
- Flexible form completion allows users to begin filling out a form and save the incomplete form for completion and submission at a later time.
- Enforced validation of user data input based on rules defined during the creation of the form.
- Ability to define arithmetic calculations (\* / + -) that can reference fields elsewhere on the form or other forms within the tab set.
- Inclusion of specific controls including dropdowns (with pre-defined values), date controls, and add a row functionality in specified areas.
- Population of read-only controls such as labels and drop-down lists on a form from secondary data sources (i.e., a referenced form, predefined data, or a user-defined source).
- Information collected in a form can be easily mapped to existing systems within the organization (e.g., other Upside Software products, ERP, procurement systems, etc.).
- Maintains versioning and audit history of any changes or updates to forms.
- Extensive reporting capabilities allow presentation of information captured
- Full security based on user-role permissions as established by the administrator.

## High Powered Forms

### Benefits

- Complete integration with UpsideContract, UpsideBilling and UpsideRFX streamlines the contract lifecycle resulting in reduced operating expenses and opportunities to increase revenues, compliance and accuracy.
- Single point of data entry for important contract, billing and RFX related information improves efficiency and saves time and effort.
- Improved accuracy in data captured during the contract negotiation, invoicing and RFX bid process.
  - Complex calculations and in-form validations ensure the reliability of contract related data (e.g., pricing, royalties, deals, rebates, etc.) and/or RFX related information (e.g., bid data).
- Information gathered from UpsideForms can be mapped to existing data structures within UpsideContract or UpsideRFX, thereby eliminating any errors associated with re-keying data.
- Correct versioning assures the latest version of the form is being used with any associated contract document.
- Accurate and comprehensive audit trail of changes to forms are maintained within the system ensuring appropriate processes/controls are being followed.
- Improved/increased involvement by internal staff in the contracting process.
- User friendly forms (in the Upside Software environment) require little training.
- Forms are designed using Microsoft InfoPath®, allowing for flexible creation and maintenance.

## About Upside Software

Upside Software is the worldwide leader in Contract Lifecycle Management (CLM) solutions. Customers around the globe use Upside Software's suite of products to confidently perform Contract Management, Sourcing & Procurement, and Invoice & Billing management activities throughout their organizations.

Upside Software's products address the needs of Enterprise (e.g. Fortune 500, Global 2000), Public sector (Federal, State / Provincial, Municipal and Health Care), and Small & Medium Enterprise (SME) customers. Customers realize significant cost savings while improving customer and supplier relationships. Upside Software's solutions are deployed in as little as 3 days and typically provide a full return-on-investment (ROI) in under a year.

Founded in 2000, Upside Software is a profitable, rapidly growing software company with an advanced, yet mature, and comprehensive product suite. The company has extensive experience delivering real value to customers of every size and in most industry verticals.

The logo for UpsideForms, with "Upside" in white on a blue background and "Forms" in yellow.

For more information about **UpsideForms** visit [www.upsidesoft.com](http://www.upsidesoft.com).

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