

Themed Dashboards Catalog



Themed Dashboards

Bring your agreement reporting beyond out-of-the-box functionality with a tailored selection of **Themed Dashboards** - ranging from legal to compliance to sales and beyond - for advanced visualizations that make analysis a breeze.

With more granularity into your workflows, you'll have the insight you need to identify process improvements, close more deals, and audit your contracts at a moment's notice.

**Themed Dashboards based on tiered pricing. Work with your rep to find a package right for you.*

Themes Available

The catalog is currently comprised of 6 Finalize dashboard theme and 1 Analyze dashboard theme.

Each theme requires certain configurations within your account - these are noted for your convenience, or can be referenced in the Themed Dashboards Booklet.



Legal

Cut out the noise of other teams and get metrics tailored just to your legal team's work



My Deals - Sales

Accelerate the deal cycle by giving your Collaborators tailored visuals of their active and in-flight deals.



Agreement Details

Dial into agreement details to capture common trends and identify process improvements for your Finalize Templates.



Department - Agreement Insights

Segment insights by department and agreement type to analyze volume and breakdown of your work.



Procurement

Quickly understand the most important aspects of your vendor contracts.



Activity Insights

Get a consolidated view into Finalize Agreement Activities to establish trends on the key actions of your organization.





Themes Available

The catalog is currently comprised of 6 Finalize dashboard theme and 1 Analyze dashboard theme.

Each theme requires certain configurations within your account - these are noted for your convenience, or can be referenced in the Themed Dashboards Booklet.



Compliance

Stay compliant with insights at your fingertips to ensure fast and easy auditability of contracts.

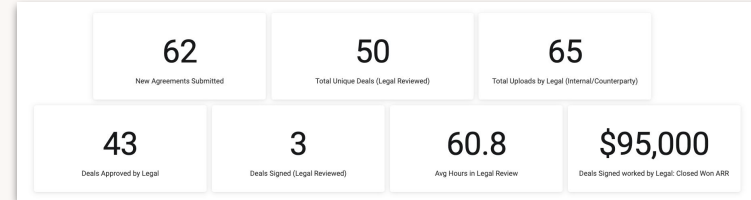
Finalize Themes

Legal

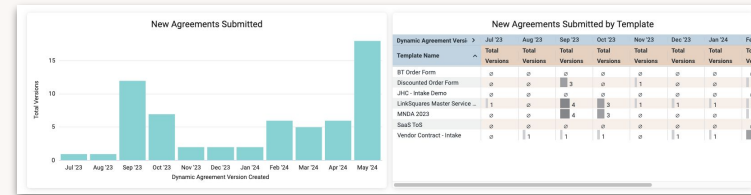
Cut out the noise of other teams and get metrics tailored just to your legal team's work

Measure the impact of your legal team by filtering out metrics for other departments. Not only can you determine workload distribution, where agreements are getting slowed down in the process and overall team efficiency, you can also directly report on the value your team is providing to the business.

- **Product:** Finalize
- **Ideal Users:** Legal Ops, Corp Counsel, Paralegal, Contracts Manager, Analyst



Ex. Summary tiles of the rest of the dashboard



Ex. New Agreements Submitted



Ex. Unique Deals Worked (By Person and by Template Group) 6

Legal

Requirements Checklist



Components required to power theme:

Department

- Legal department's name
Example: Corporate Counsel

Template Questions

Revenue

- Example question: *What is the annual recurring revenue (ARR) of this agreement?*
- Supports one format
 - Value [XX,XXX]
 - Range [Less than \$10,000]

Opportunity Close Date

- Example question: *What is the Opportunity Close Date?*

Opportunity ID

- Example question: *What is the opportunity id?*

\$15,000

Deals Signed worked by Legal: Closed Won ARR

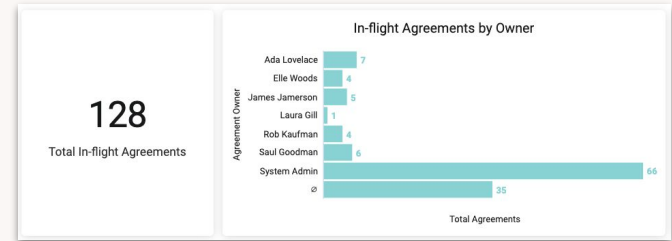
My Deals | Sales

Accelerate deal cycles by giving your Collaborators tailored visuals of their inflight deals.

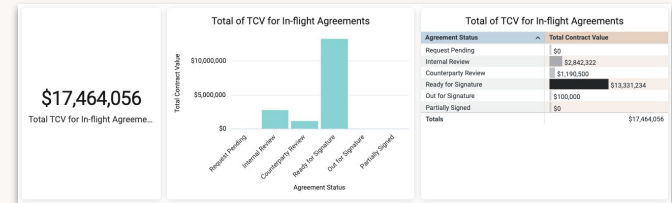
Give Collaborators the visibility they need to close deals faster with tailored dashboards to track where their deals stand.

The My Deals view leverages an Access Control list to tailor visualizations to the viewer, showing only the in-flight agreements relevant to them.

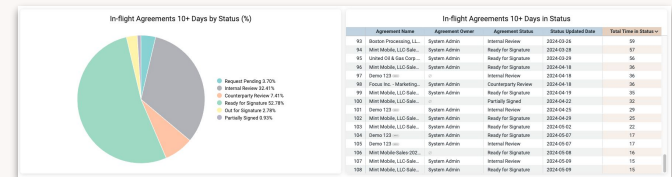
- **Product:** Finalize
- **Ideal Users:** Sales, Legal Ops, Corp Counsel, Paralegal, Contracts Manager, Analyst



Ex. In-flight Agreements and by Owner



Ex. In-flight Revenue Insights



Ex. Aging In-flight Agreements (10+ Days in Status)

My Deals | Sales

Requirements Checklist

Components required to power theme:

Department

- Legal department's name
Example: Corporate Counsel

Template Questions

Revenue

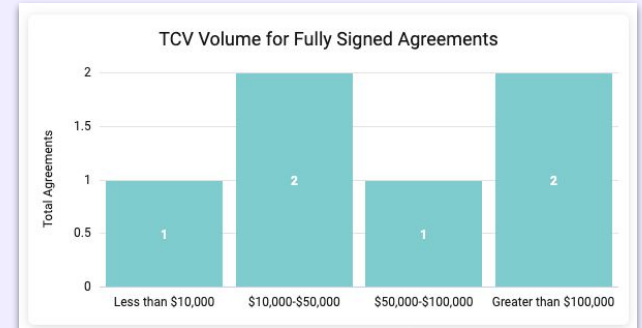
- Example question: *What is the annual recurring revenue (ARR) of this agreement?*
- Supports one format
 - Value [XX,XXX]
 - Range [Less than \$10,000]

Opportunity ID

- Example question: *What is the opportunity id?*



Ex. Value format



Ex. Range format

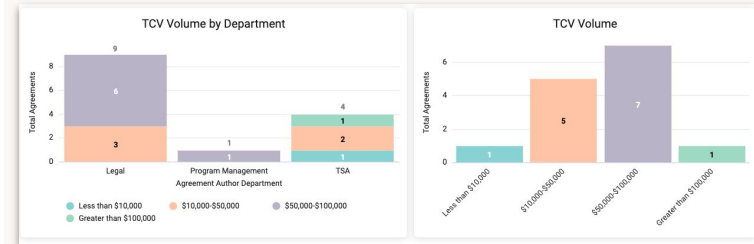
Department | Agreement Insights

Segment insights by department and agreement type to analyze volume and breakdown of your work.

Legal teams service departments across the entire organization, delivering agreements to keep the business moving.

A comprehensive breakdown of where the volume of your work is - whether by departments serviced or agreement types worked - helps with workload management, process improvements, resource planning, and ultimately reporting out on the impact of your team.

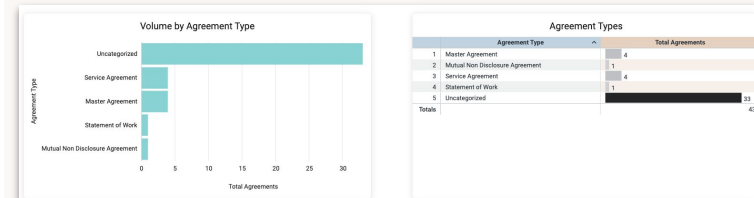
- **Product:** Finalize
- **Ideal Users:** Legal Ops, Corp Counsel, Paralegal, Contracts Manager, Analyst



Ex. TCV by Department and Volume



Ex. Open and Avg Completion of Tasks by Department



Ex. Agreement Type Breakdown

Department | Agreement Insights

Requirements Checklist



Components required to power theme:

Department

- Update your LinkSquares users with a department
- Alternative: Add a question in your templates for the user to indicate their Department
 - Note: this implementation will not allow Task data by Department

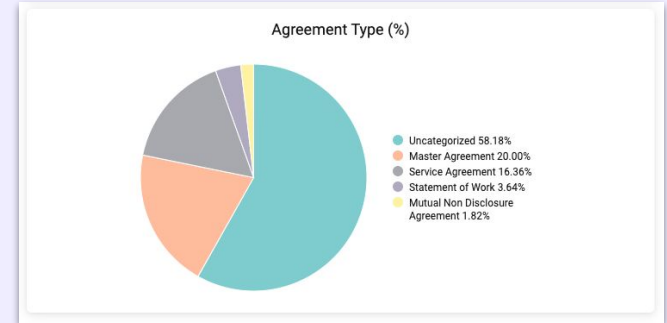
Agreement Type

- Associate templates with an agreement type

Template Questions

Revenue

- Example question: *What is the annual recurring revenue (ARR) of this agreement?*
- Supports one format
 - Value [XX,XXX]
 - Range [Less than \$10,000]



Ex. Percent share by Agreement Type

Agreement Details



Analyze granular agreement details to capture common trends and identify process improvements for your Finalize Templates.

The Agreement Details dashboard enables you to see granular details of your agreements so you can bulk download and manipulate data.

Quickly pull all questions, answers, and token values for your templates to identify process challenges and improvements. Or, sort and group agreements based on answers so you can get just the answers you need.

- **Product:** Finalize
- **Ideal Users:** Legal Ops, Corp Counsel, Paralegal, Contracts Manager, Analyst



Ex. Agreements by Template Tiles

LinkSquares Master Service Agreement (Template GSA)														
Agreement Name	Template Name	Agreement Counter	Status Update	Initial Author	Agreement Author	Agreement Owner	Present Collocation	Activity Type	Last Activity Date/Time	Done?	Who is the counterparty point of contact?	Who is the counterparty located?	What's the counterparty?	Amount
Carroll	LinkSquares Master Service Agreement (2023)	2024	Invoic	2024	Andra	Synte	Synte	Synte	Andra	2024	af785	ABZ	USA	\$10,000
Serna	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Andra	Synte	Comp	Andra	2024	9f82a	ABZ	USA	\$10,000	
Pratt	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Laura	Synte	Andra	Comp	Bob A	2024	7946d	ag@linksquare.com	USA	\$50,000
Mina	LinkSquares Master Service Agreement (2023)	2024	Invoic	2024	Synte	Synte	Synte	Andra	2024	6488f	Ryan Reynolds	Canada	\$50,000	
Mina	LinkSquares Master Service Agreement (2023)	2024	Full	2024	Synte	Paul	pt ext	Andra	2024	af46d	Ryan Reynolds	USA	\$50,000	
Mina	LinkSquares Master Service Agreement (2023)	2024	Invoic	2024	Synte	Synte	Paul	Andra	2024	3293f	Ryan Reynolds	USA	\$50,000	
Mina	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Andra	Synte	Andra	Andra	2024	156ad	Andra	USA	\$50,000	
Mina	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Synte	Synte	Andra	Comp	2024	0553a	Ryan Reynolds	USA	\$50,000	
Mina	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Synte	Andra	Andra	Andra	2024	9262d	Paul	USA	\$50,000	
Mina	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Synte	Andra	Comp	Andra	2024	af33a	Ryan Reynolds	USA	\$10,000	
Mina	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Synte	Synte	Synte	Andra	2024	1192d	Ryan Reynolds	UK	\$10,000	
Mina	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Synte	Synte	Andra	Andra	2024	2d74f	Ryan Reynolds	USA	\$50,000	
Bosch	LinkSquares Master Service Agreement (2023)	2024	Invoic	2024	Synte	Synte	Synte	Synte	Andra	2024	8f14a	Ryan Reynolds	USA	\$50,000
COB	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Synte	Synte	Synte	Synte	Andra	2024	8d89c	Ryan Reynolds	USA	\$50,000
Dick	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Synte	Andra	Comp	Andra	2024	ca87f	Andra	USA	\$10,000	
Janis	LinkSquares Master Service Agreement (2023)	2023	Ready	2023	Synte	Synte	Andra	Synte	2023	2d46a	Laura Smith	USA	\$45,000	
Janis	LinkSquares Master Service Agreement (2023)	2023	Ready	2024	Synte	Synte	Andra	Andra	2023	3a393	Laura Smith	USA	\$10,000	
Janis	LinkSquares Master Service Agreement (2023)	2023	Ready	2024	Synte	Synte	Andra	Andra	2023	1913	Laura Smith	USA	\$10,000	
ABC L	LinkSquares Master Service Agreement (2023)	2023	Ready	2024	Synte	Synte	Comp	Andra	2024	10c41	Elia Wanda	USA	\$10,000	
Eggen	LinkSquares Master Service Agreement (2023)	2023	Ready	2023	Synte	Synte	Comp	Andra	2023	7a7f4	Joeli Davis	USA	\$80,000	

LinkSquares Master Service Agreement (Tokens Answers)																	
Agreement Name	Template Name	Agreement Counter	Agreement Status	Status Update	Agreement Author	Agreement Owner	Collocation	Activity Type	Last Activity Date/Time	Value	Answer	Answer	Answer	Answer			
Item 11	LinkSquares Master Service Agreement (2023)	2024-05	Ready	2024-05	Andra	Synte	Synte	Synte	Andra	2024-05	af785a	May 02 2024	ABC	123	State	AND	USA
Item 12	LinkSquares Master Service Agreement (2023)	2024-05	Ready	2024-05	Andra	Synte	Comp	Andra	2024-05	9f82af	May 02 2024	ABC	123	State	AND	USA	
Item 14	LinkSquares Master Service Agreement (2023)	2024-05	Ready	2024-05	Laura D	Synte	Bob Max	Comp	Bob Max	2024-05	7946d5	June 18 2024	Prize Market	63	Man	PA	COO
Item 15	LinkSquares Master Service Agreement (2023)	2024-05	Ready	2024-05	Andra	Synte	Paul Dave	Comp	Andra	2024-05	af46df	May 02 2024	ABC	123	State	AND	COO

Ex. Q&A and Token Breakdown by Templates

Agreement Details

Requirements Checklist

Components required to power theme:

[Template Name] Details - up to 6 "Template Details" tiles.

Each tile is configured for one template with either Agreement Questions & Answer or Token and Answer data.

- Select template name(s)
- Select agreement data type for tiles
 - Questions and Answers
 - Tokens and Answers



LinkSquares Master Service Agreement (Template Q&A)			
>	Who is the counterparty point of contact?	Where is the counterparty located?	What is the...
	Answer	Answer	
	Daisy Heffron	USA	Less than \$1
	Ryan Reynolds	USA	\$10,000-\$50
	Bob Poldark	USA	Less than \$1
	Bob Builder	USA	Greater than
	Laura Gill	USA	\$50,000-\$10

Ex. Template Questions & Answers format

LinkSquares Master Service Agreement			
>	#[EFFECTIVE_DATE]#	#[COUNTERPARTY]#	#[COUNTE...
	Answer	Answer	
588df2 ...	June 30, 2024	Fatrlife, Inc	18 Super Lane, Woburn, MA 01801
2081f9 ...	June 3, 2024	Mint Mobile, LLC	17870 Newhope Street #104-155 Four
f5804 ...	June 6, 2024	City of Woburn	25 Orange Rd, Woburn, MA
a851a0 ...	June 1, 2024	DigSafe	2254 Super Lane, Coffeerville, AL 3652
bdd21 ...	June 30, 2024	BuyerZone	225 Wyman St, Waltham, MA
59f39 ...	May 30, 2024	ABC, Inc	123 State

Ex. Template Tokens & Answers format

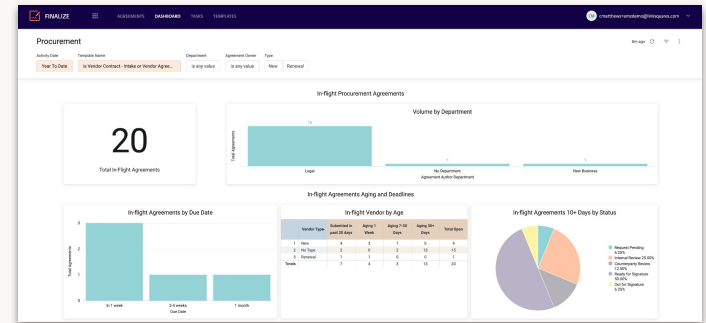
Procurement

Understand the most important aspects of your vendor contracts for quick and clear insights.

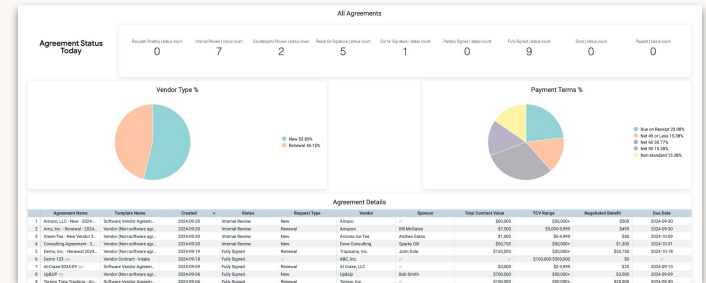
Procurement handles a high-volume of vendor agreements, but it's difficult to find what they need given the overwhelming amount of other contract types in Finalize.

With a Procurement dashboard, quickly understand the most important aspects of your vendor contracts. Visualizations are tailored to vendor contracts so you can see what's outstanding across in-flight agreements, where bottlenecks may be slowing you down, and what negotiation impact your team had in managing vendor costs.

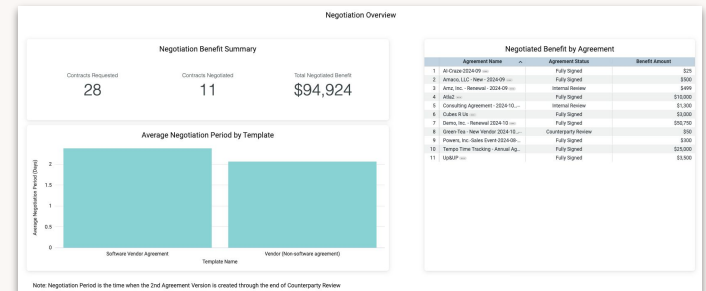
- **Product:** Finalize
- **Ideal Users:** Procurement Managers, Finance Managers



Ex. In-Flight Procurement Agreement Overview



Ex. In-Flight Procurement Agreement Overview



Ex. Negotiation Overview relating to Procurement Agreements

Procurement

Requirements Checklist



Components required to power theme:

Template Questions

- Department (or leverage agreement author dept)
- Due Date
- Vendor Name
- Business Sponsor
- Purchase Type
 - New
 - Renewal
 - Upsell / Expansion
- Payment Terms
 - Terms of Payment
- Negotiated Benefit
 - Yes / No
 - Yes has a condition, when selected enter the amount negotiated
- Total Contract Value
 - Range or value

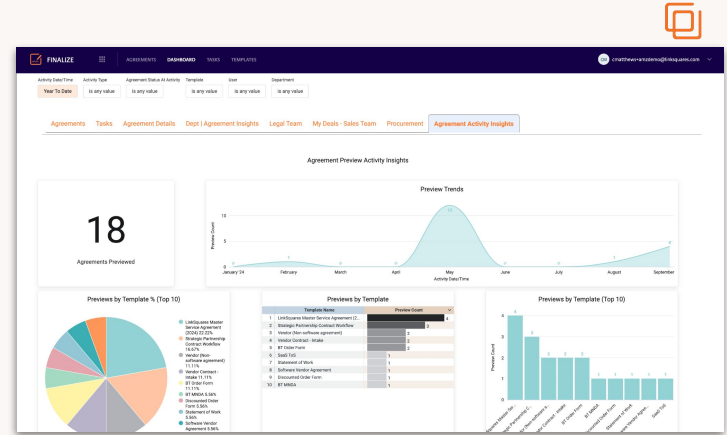
Agreement Activity Insights

Track activities across your Finalize agreements to understand trends from draft to signature.

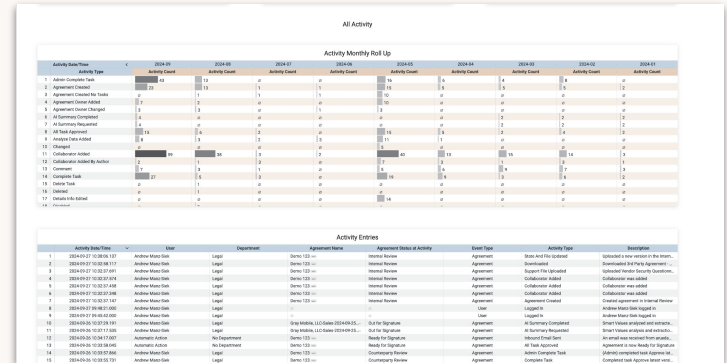
Actions taken across Finalize agreements are tracked and logged so you know who's been working on agreements and how they are progressing.

The Agreement Activity Insights dashboard enables you to drill into the key actions you care most and establish trends across your portfolio. Whether it's agreements being downloaded or tasks being created and completed, pull a comprehensive summary of actions to assist with internal policies, compliance audits, and more.

- **Product:** Finalize
- **Ideal Users:** Risk + Compliance Manager, Legal Ops, Corp Counsel, Paralegal, Contracts Manager, Analyst



Ex: Activity Insights breakdown by "Agreement Preview"



Ex: Full activity log breakdown by Monthly Roll Up and all time entries



Agreement Activity Insights

Requirements Checklist



Components required to power theme:

Agreement Activity Insights Tiles - *prefilled with Agreement Preview data.*

- Select **one** of the following as an alternative to Agreement Preview:
 - Agreements Downloaded
 - Collaborator Added
 - Commented
 - Details Info Edited
 - Inbound Email Sent
 - Outbound Email Sent
 - Tasks Created
 - Tasks Completed

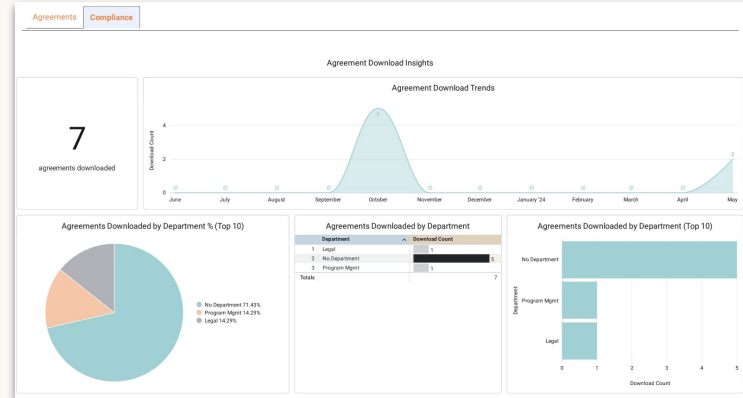
Analyze Themes

Compliance

Stay compliant with insights at your fingertips to ensure fast and easy auditability of contracts.

Hone in on the activities your Compliance team cares about most – whether that’s Agreements Downloaded, Agreements Deleted, or even when Users Log in – and cater a tailored visualization so they can get answers fast and understand activities happening by department.

- **Product:** Analyze
- **Ideal Users:** Risk + Compliance Manager, Legal Ops, Corp Counsel, Paralegal, Contracts Manager, Analyst



Ex. Agreement Download Insights

Audit Logs

Monthly Rollup

Month	Activity Type	2024-05	2024-04	2024-03	2024-02	2024-01	2023-12	2023-11	2023-10	2023-09	2023-08	2023-07	2023-06
1	Agreement - added	0	0	1	0	0	0	1	1,377	0	0	0	0
2	Agreement - approved	0	0	0	0	0	0	0	213	0	0	0	0
3	Agreement - created	0	0	3	0	0	0	1	215	0	0	0	0
4	Agreement - deleted	0	0	2	0	0	0	0	0	0	0	0	0
5	Agreement - downloaded	2	0	2	0	0	0	0	5	0	0	0	0
6	Agreement - received via Workato (Google Drive)	0	0	1	0	0	0	0	0	0	0	0	0
7	Agreement - updated	0	0	1	0	0	2	2	0	0	0	0	0
8	Agreement - uploaded to Workato trigger endpoint 5	0	0	1	0	0	0	0	0	0	0	0	0
9	Agreement - uploaded to Workato trigger endpoint 6	0	0	13	1	5	1	8	7	0	0	0	0
10	API Key - created	5	0	3	0	0	0	0	0	0	0	0	0
11	API Key - deleted	0	0	2	0	0	0	0	0	0	0	0	0
12	API Key - updated	0	0	0	0	0	0	0	0	0	0	0	0
13	Reporting Settings - changed	0	0	0	0	0	0	0	1	0	0	0	0
14	Tag - created	0	0	0	0	0	0	1	1	188	0	0	0
15	Team - created	0	0	1	0	0	1	0	1	5	0	0	0
16	User - changed	1	3	0	0	0	0	0	0	0	0	0	0
17	User - deleted	1	0	0	0	0	0	0	0	0	0	0	0
18	User - updated	1	0	0	0	0	0	0	0	0	0	0	0

Ex. Audit Log - Monthly Rollup

Log Entries

Activity Sub/Time	Username	Department	Activity Type	Description	Error Type	Action
1 2024-05-15 09:21:23	Roft-Gil	Legal	Agreement - viewed	Bentley LinkSystems, Inc. - Monitor App.	Agreement	viewed
2 2024-05-15 09:21:15	Roft-Gil	Legal	Agreement - downloaded	Alford Dental Practice, LinkSystems, P.	Agreement	downloaded
3 2024-05-15 09:21:03	Roft-Gil	Legal	Agreement - viewed	Alford Dental Practice, LinkSystems, P.	Agreement	viewed
4 2024-05-15 09:21:00	Roft-Gil	Legal	User - enabled	Both Gil was enabled	User	enabled
5 2024-05-15 09:20:21	LinkSystems Team	No Department	User - invited	Both Gil was invited	User	invited
6 2024-05-08 15:00:25	LinkSystems Team	No Department	User - disabled	Laure Gil was disabled	User	disabled
7 2024-04-08 12:58:51	LinkSystems Team	No Department	User - disabled	Robert Kaufman was disabled	User	disabled
8 2024-04-08 15:07:00	LinkSystems Team	No Department	User - disabled	Laure Gil was disabled	User	disabled
9 2024-05-07 15:45:32	Laure Gil	Program Mgmt	Agreement - viewed	Ajix LinkSystems, Inc. - Amendment...	Agreement	viewed
10 2024-05-07 15:44:36	Laure Gil	Program Mgmt	Agreement - downloaded	Ajix LinkSystems, Inc. - Amendment...	Agreement	downloaded
11 2024-05-07 15:44:31	Laure Gil	Program Mgmt	Agreement - viewed	Ajix LinkSystems, Inc. - Amendment...	Agreement	viewed
12 2024-05-07 15:44:45	Laure Gil	Program Mgmt	User - logged in	Laure Gil logged in	User	logged in
13 2024-04-06 15:04:52	LinkSystems Team	No Department	User - changed	Frances was role on Robert Kaufman.	User	changed
14 2024-05-03 14:56:43	LinkSystems Team	No Department	Agreement - viewed	Acme Corp, LinkSystems, Inc. - Maste...	Agreement	viewed
15 2024-05-03 15:04:28	LinkSystems Team	No Department	User - changed	Frances user role on Laure Gil was c...	User	changed
16 2024-04-02 17:04:05	Laure Gil	Program Mgmt	User - logged in	Laure Gil logged in	User	logged in
17 2024-04-02 17:03:42	LinkSystems Team	No Department	User - changed	Frances user role on Laure Gil was c...	User	changed
18 2024-04-02 17:03:24	Laure Gil	Program Mgmt	User - logged in	Laure Gil logged in	User	logged in

Ex. Audit Log - Log Entries

Compliance

Requirements Checklist

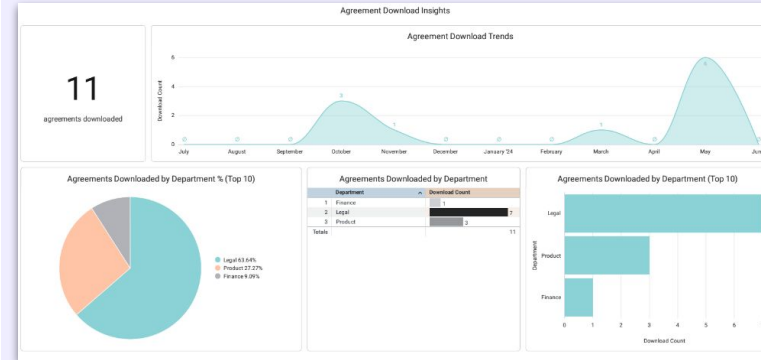
Components required to power theme:

Department

- ☐ Update your LinkSquares users with a department
Example: Corporate Counsel

Activity Insights Tiles - prefilled with Agreement Download data

- ☐ Select **one** of the following as an alternative to Agreement Download:
 - ☐ Agreement - added
 - ☐ Agreement - created
 - ☐ Agreement - deleted
 - ☐ Agreement - updated
 - ☐ Agreement - viewed
 - ☐ Governing Summary - updated
 - ☐ Tag - created
 - ☐ User - logged in



Ex. Activity Insights tiles