

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 themes and 2 Analyze dashboard themes.

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



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 themes and 2 Analyze dashboard themes.

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



Compliance

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



Due Diligence

Seamlessly prepare for mergers and acquisitions with tailored insights.

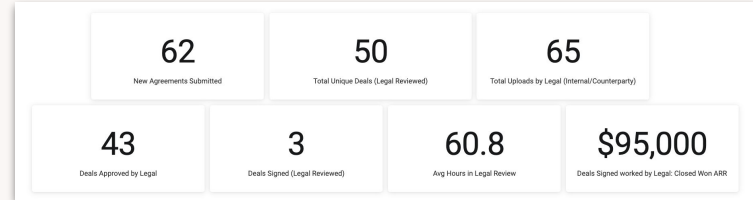
Finalize Themes

Legal

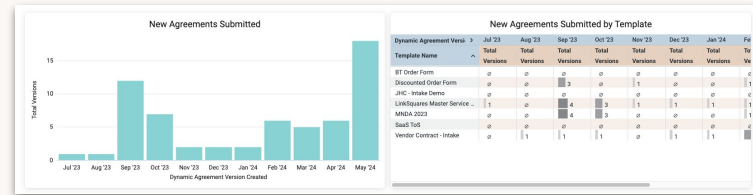
Cut out the noise of other teams and get metrics tailored just to your legal team's work

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.

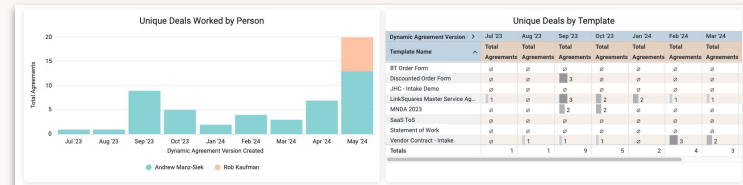
- **Product:** Finalize
- **Ideal Users:** Legal Ops, Corp Counsel, Paralegal, Contracts Manager, Analyst



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

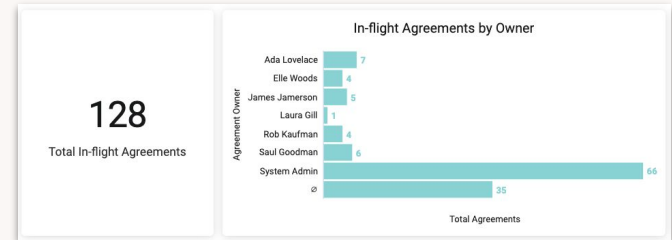
My Deals | Sales

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

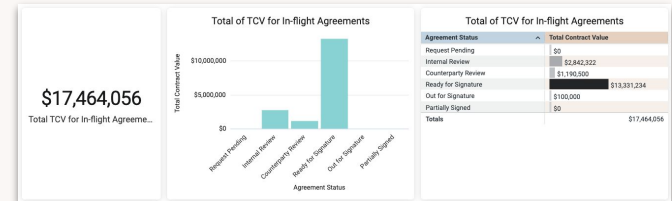
Give Collaborators the visibility they need to close deals faster with tailored dashboards to track where their deals stand.

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

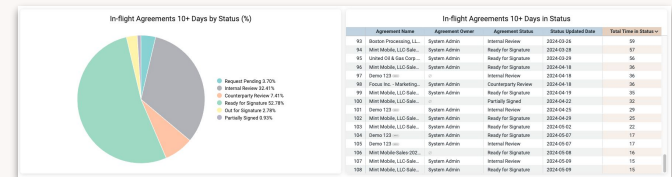
- **Product:** Finalize
- **Ideal Users:** Sales, Legal Ops, Corp Counsel, Paralegal, Contracts Manager, Analyst



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

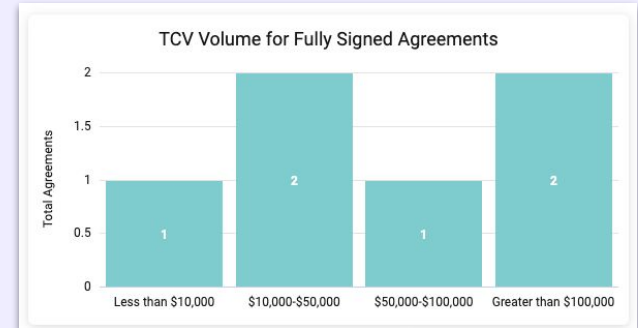
- Example question: *What is the annual recurring revenue (ARR) of this agreement?*
- Supports one format
 - Value [XX,XXX]
 - Range [Less than \$10,000]

Opportunity ID

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



Ex. Value format



Ex. Range format

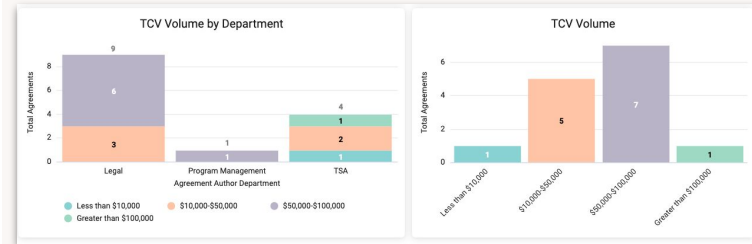
Department | Agreement Insights

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.

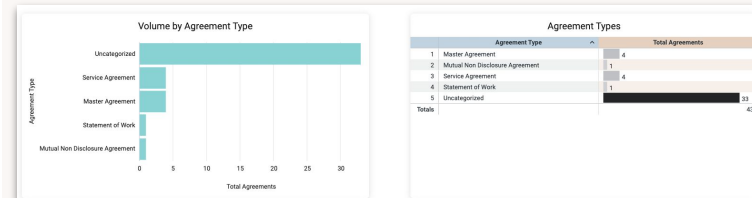
- **Product:** Finalize
- **Ideal Users:** Legal Ops, Corp Counsel, Paralegal, Contracts Manager, Analyst



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

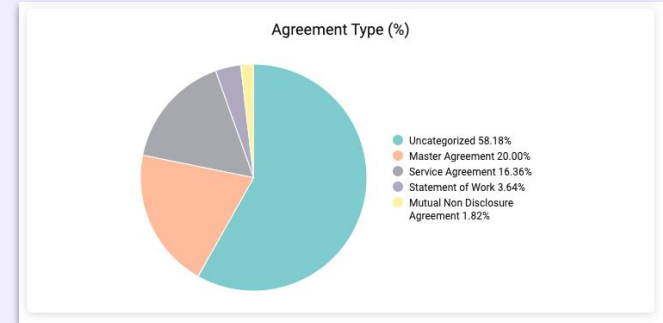
Agreement Type

- 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

Agreement Details by Template

LinkSquares Master Service Agreement (Template GSA)

Agreement Name	Agreement Counter	Status Update	Initial Author	Agreement Author	Agreement Owner	Present Activity	Collaboration	Activity Type	Last Activity Date/Time	Ques ID	Who is the counterparty point of contact?	Who is the counterparty located?	What's the Answer	Answer
Carroll - LinkSquares Master Service Agreement (2023)	2024	Invoic	2024	Andra	Synte	Synte	Andra	2024	4780	AMZ	USA	\$10,000		
Samra - LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Andra	Synte	Comp	Andra	2024	4824	AMZ	USA	\$10,000		
Phara - LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Laura	Synte	Comp	Rob	2024	7940	AMZ	USA	\$10,000		
Mimi - LinkSquares Master Service Agreement (2023)	2024	Invoic	2024	Synte	Synte	Andra	2024	4488	AMZ	Canada		\$10,000		
Mimi - LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Synte	Andra	Comp	Andra	2024	4744	AMZ	USA	\$10,000		
Mimi - LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Synte	Andra	Comp	Andra	2024	5205	AMZ	USA	\$10,000		
Samra - LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Andra	Synte	Comp	Andra	2024	1044	AMZ	USA	\$10,000		
Mimi - LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Synte	Synte	Andra	Comp	2024	4556	AMZ	Canada		\$10,000	
Mimi - LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Andra	Synte	Comp	Andra	2024	4824	AMZ	USA	\$10,000		
Mimi - LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Synte	Synte	Andra	Comp	2024	1182	AMZ	USA	\$10,000		
Mimi - LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Synte	Synte	Andra	Comp	2024	3214	AMZ	USA	\$10,000		
Booth - LinkSquares Master Service Agreement (2023)	2024	Invoic	2024	Synte	Synte	Andra	Comp	2024	8914	AMZ	USA	\$10,000		
COBE - LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Synte	Synte	Comp	Andra	2024	4824	AMZ	USA	\$10,000		
Diana - LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Synte	Andra	Comp	Andra	2024	4487	AMZ	USA	\$10,000		
Janice - LinkSquares Master Service Agreement (2023)	2023	Ready	2023	Synte	Synte	Andra	Comp	2023	2426	AMZ	USA	\$4,000		
Janice - LinkSquares Master Service Agreement (2023)	2023	Ready	2024	Synte	Synte	Andra	Comp	2023	3429	AMZ	USA	\$10,000		
Janice - LinkSquares Master Service Agreement (2023)	2023	Ready	2024	Synte	Synte	Andra	Comp	2023	1913	AMZ	USA	\$10,000		
ABC L - LinkSquares Master Service Agreement (2023)	2023	Ready	2024	Synte	Synte	Comp	Andra	2024	1044	AMZ	USA	\$10,000		
Edgar - LinkSquares Master Service Agreement (2023)	2023	Ready	2023	Synte	Synte	Comp	Andra	2023	7474	AMZ	USA	\$80,000		

LinkSquares Master Service Agreement (Tokens Answers)

Agreement Name	Agreement Counter	Agreement Status	Status Update	Agreement Author	Agreement Owner	Collaboration	Recent Activity	Activity Type	Last Activity Date/Time	Index	ANSWER	ANSWER	ANSWER	ANSWER	ANSWER	
Samra 11 - LinkSquares Master Service Agreement (2023)	2024-05	Ready	2024-05	Andra	Synte	Synte	Andra	2024-05	478704	May 22 2024	ABC	40	133	Stacy	AND	
Samra 12 - LinkSquares Master Service Agreement (2023)	2024-05	Ready	2024-05	Andra	Synte	Comp	Andra	2024-05	482407	May 22 2024	ABC	40	133	Stacy	AND	
Phara 16 - LinkSquares Master Service Agreement (2023)	2024-05	Ready	2024-05	Laura	Synte	Rob Max	Comp	Rob Max	2024-05	794020	June 18 2024	Phara	16	10	Page View	COE
Mimi 14 - LinkSquares Master Service Agreement (2023)	2024-05	Ready	2024-05	Synte	Synte	Andra	Comp	Andra	2024-05	448804	May 22 2024	Mimi	14	10	Page View	COE

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



>	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

>	#[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

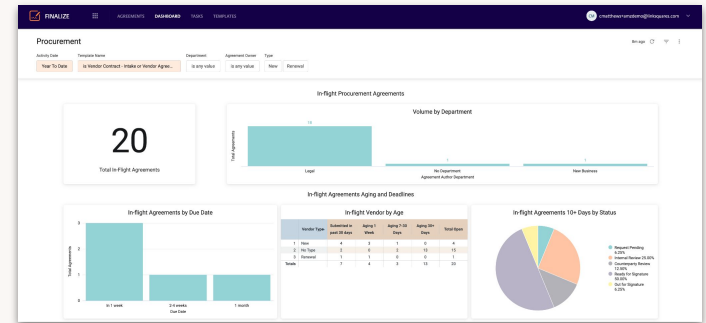
Procurement

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

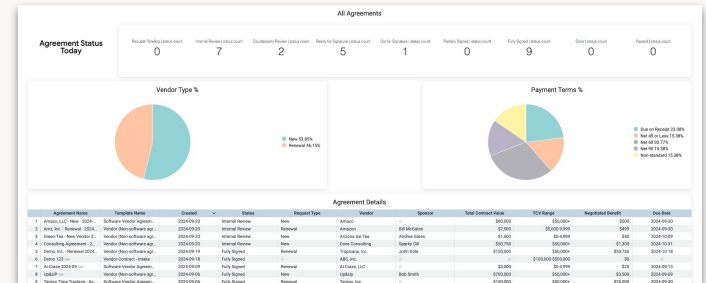
Procurement handles a high-volume of vendor agreements, but it's difficult to find what they need given the overwhelming amount of other contract types in Finalize.

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.

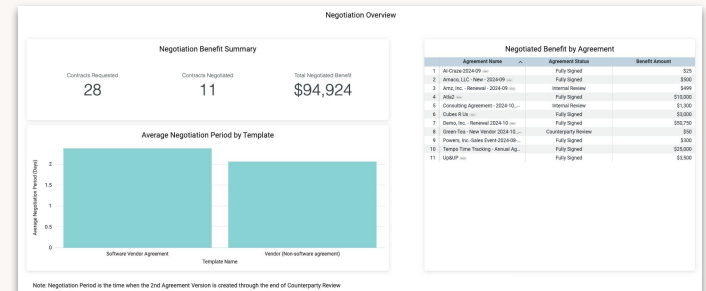
- **Product:** Finalize
- **Ideal Users:** Procurement Managers, Finance Managers



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

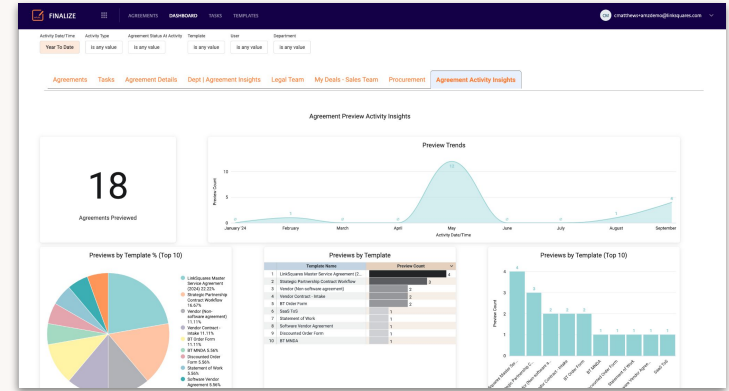
Agreement Activity Insights

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"

		Activity Monthly Roll Up											
		2024-01		2024-02		2024-03		2024-04		2024-05		2024-06	
Activity Name	Count	Activity Count	Activity Count	Activity Count	Activity Count	Activity Count	Activity Count	Activity Count	Activity Count	Activity Count	Activity Count	Activity Count	Activity Count
1. Admin Complete Task	1	1	0	0	0	0	0	0	0	0	0	0	0
2. Agreement Download New Task	1	1	0	0	0	0	0	0	0	0	0	0	0
3. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
4. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
5. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
6. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
7. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
8. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
9. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
10. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
11. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
12. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
13. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
14. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
15. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
16. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
17. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
18. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
19. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0
20. Agreement Download Task	1	1	0	0	0	0	0	0	0	0	0	0	0

Activity Entries										
Activity Name	User	Department	Agreement Name	Agreement Status at Activity	Event Type	Activity Type	Description			
1. Admin Complete Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Admin Complete Task	Initial Review of Agreement			
2. Agreement Download New Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download New Task	Downloaded New Task Agreement			
3. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
4. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
5. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
6. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
7. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
8. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
9. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
10. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
11. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
12. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
13. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
14. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
15. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
16. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
17. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
18. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
19. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			
20. Agreement Download Task	Andrew Mason	Legal	2024-01-10-0000-001	Initial Review	Task	Agreement Download Task	Downloaded Agreement from System			

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

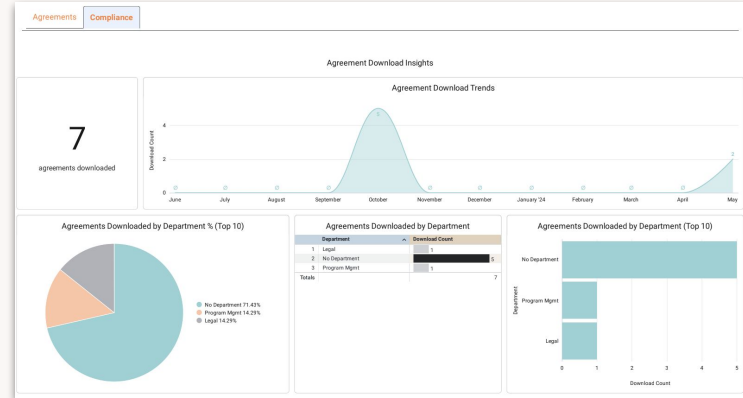
Analyze Themes

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 Roll Up

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	215	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 5	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	Allied Digital Products, LinkSystems, P.	Agreement	downloaded
3 2024-05-15 09:21:03	Roft-Gil	Legal	Agreement - viewed	Allied Digital Products, LinkSystems, P.	Agreement	viewed
4 2024-05-15 09:21:00	Roft-Gil	Legal	User - enabled	Both OI was enabled	User	enabled
5 2024-05-15 09:20:27	LinkSystems Team	No Department	User - invited	Both OI was invited	User	invited
6 2024-05-08 15:00:25	LinkSystems Team	No Department	User - disabled	Laurel OI 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	Laurel OI was disabled	User	disabled
9 2024-05-07 15:45:32	Laurel Gil	Program Mgmt	Agreement - viewed	Ajix LinkSystems, Inc. - Amendment...	Agreement	viewed
10 2024-05-07 15:44:36	Laurel Gil	Program Mgmt	Agreement - downloaded	Ajix LinkSystems, Inc. - Amendment...	Agreement	downloaded
11 2024-05-07 15:44:35	Laurel Gil	Program Mgmt	Agreement - viewed	Ajix LinkSystems, Inc. - Amendment...	Agreement	viewed
12 2024-05-07 15:44:45	Laurel Gil	Program Mgmt	User - logged in	Laurel Gil logged in	User	logged in
13 2024-05-06 15:04:52	LinkSystems Team	No Department	User - changed	Franchise user 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	Franchise user role on Laurel Gil was c...	User	changed
16 2024-04-02 17:04:05	Laurel Gil	Program Mgmt	User - logged in	Laurel Gil logged in	User	logged in
17 2024-04-02 17:03:42	LinkSystems Team	No Department	User - changed	Franchise user role on Laurel Gil was c...	User	changed
18 2024-04-02 17:03:24	Laurel Gil	Program Mgmt	User - logged in	Laurel Gil logged in	User	logged in

Ex. Audit Log - Log Entries

Compliance

Requirements Checklist

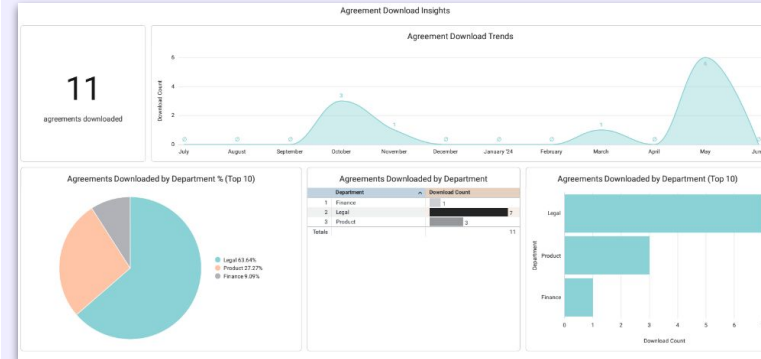
Components required to power theme:

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

Due Diligence

Seamlessly prepare for mergers and acquisitions with tailored insights.

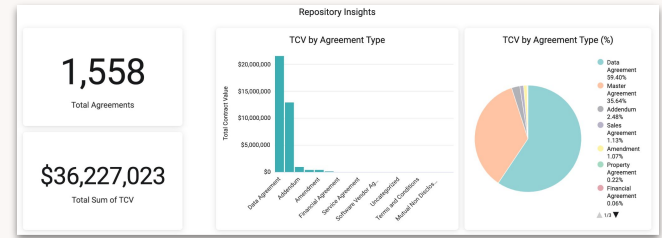
LinkSquares' Due Diligence dashboard gives you easy insight into the current state of your business, making M&A preparation a breeze.

Review a breakdown of your portfolio's value, understanding Total Contract Value by agreement type or in relation to upcoming Terminations.

Get a quick breakdown of the terms across your contracts that impact M&A activities the most like Change of Control and Intellectual Property Rights to name a few.

- **Product:** Analyze
- **Ideal Users:** Finance, Legal Ops, Business Ops

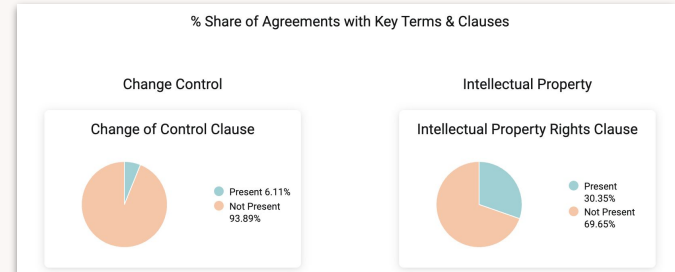
*Results can be adjusted to show the active term within a Governing Summary.



Ex. Key repository insights

Agreement Name	Agreement Type	Governing Summary Name	Renewal Date	Effective Date	Termination Date
Aadark Global Innovations, LinkSquares, Inc. - Master Agreement - 2020-01-01	Master Agreement	Aadark Summary		2020-01-01	2024-01-01
Aadark Global Innovations, LinkSquares, Inc. - Amendment - 2020-01-24	Amendment	Aadark Summary	2021-01-24	2020-01-24	2024-01-01
Aadark Global Innovations, LinkSquares, Inc. - Data Agreement - 2020-01-06	Data Agreement	Aadark Summary		2020-01-06	2024-05-31
Abnorbly Ward, LinkSquares, Inc. - Master Agreement - 2021-07-09	Master Agreement			2022-07-09	2024-06-30
Abnorbly Inc, LinkSquares, Inc. - Master Agreement - 2024-06-30	Master Agreement			2024-06-30	2025-06-29
Alligatomobile Inc, LinkSquares, Inc. - Amendment - 2019-11-30	Amendment			2020-11-30	2024-05-31
Alligatomobile Inc, LinkSquares, Inc. - Master Agreement - 2019-01-21	Master Agreement			2020-01-21	2019-01-21
Alpha Bioscience, Inc., Echo Asset Management, Inc. - Consent Agreement - 2022-12-20	Consent Agreement			2022-12-20	
Alpha Bioscience, Inc., LinkSquares, Inc. - Amendment - 2019-11-22	Amendment	Alphaelectronics Summary Finance	2020-11-22	2019-11-22	2021-01-12
Alphaelectronics, LinkSquares, Inc. - Data Agreement	Data Agreement	Alphaelectronics Summary Finance			
Alphaelectronics, LinkSquares, Inc. - Master Agreement - 2019-01-13	Master Agreement	Alphaelectronics Summary Finance	2022-01-13	2019-01-13	2022-01-13
Alphascho, LinkSquares, Inc. - Data Agreement	Data Agreement				
Alphascho, LinkSquares, Inc. - Master Agreement - 2019-05-16	Master Agreement		2021-05-16	2019-05-16	2021-05-16

Ex. Key Agreement Dates & Terms for easy reference



Ex. Breakdown of Key Terms important to your M&A activities



Due Diligence

Requirements Checklist

Components required to power theme:

Governing Summaries:

Indicate the default for this filter.

- On: Any terms that are controlled by a Governing Summary will be automatically updated to the Governing Term
- Off: All terms will load as they are displayed in the Agreement Terms

Provide a list of **Tags** or **Terms** that will be used to categorize upcoming Terminations or by Total Contract Value and Total Sum of TCV tiles:

Tags

- New
- Renewal

Global Terms

- Select from your Global Terms list

Total Contract Value (or any Revenue field)

- Term Name: Total Contract Value
- Term Category: Number

Termination Date (or any Date field)

- Term Name: Termination Date
- Term Category: Date



Due Diligence

Apply Governing Summary: Off On

Governing Summary:

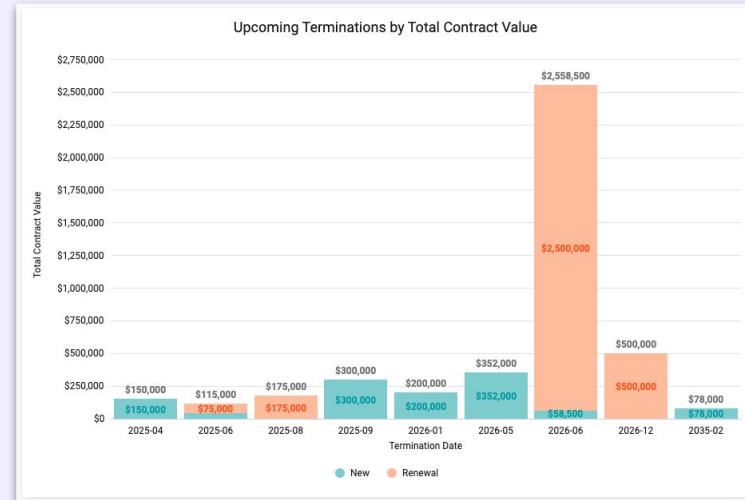
Agreement Type:

Tag Name:

Tag Color:

Term Name:

Ex. Top level filters



Ex. Upcoming Terminations by Total Contract Value