

# Themed Dashboards Catalog



## Themed Dashboards

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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

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The catalog is currently comprised of 5 dashboard themes across both Finalize and Analyze.

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.



## Compliance

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

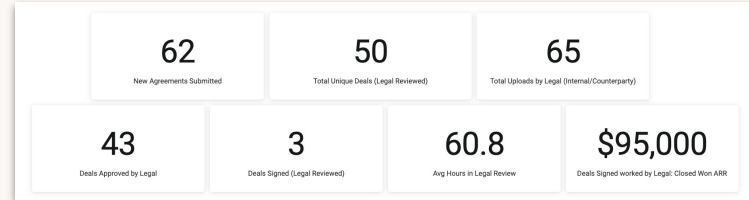
# Finalize Themes

# Legal

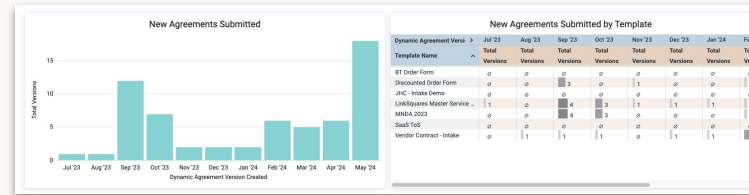
Cut out the noise of other teams and get metrics tailored just to your legal team's work

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.

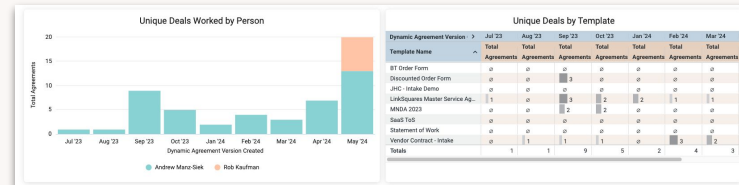
- **Product:** Finalize
- **Ideal Users:** Legal Ops, Corp Counsel, Paralegal, Contracts Manager, Analyst



Ex. Summary tiles of the rest of the dashboard



Ex. New Agreements Submitted



Ex. Unique Deals Worked (By Person and by Template Group) 5

# 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

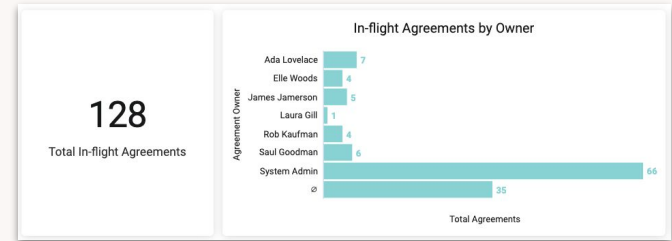
# My Deals | Sales

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

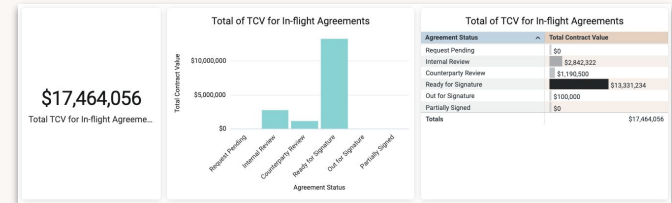
Give Collaborators the visibility they need to close deals faster with tailored dashboards to track where their deals stand.

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

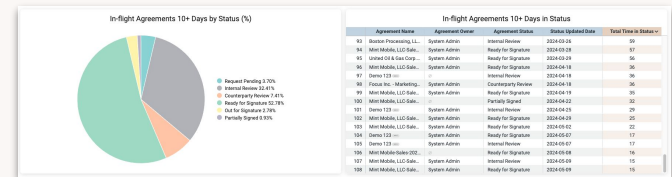
- **Product:** Finalize
- **Ideal Users:** Sales, Legal Ops, Corp Counsel, Paralegal, Contracts Manager, Analyst



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?*



\$7,319,123

Total TCV of Fully Signed

Ex. Value format



Ex. Range format



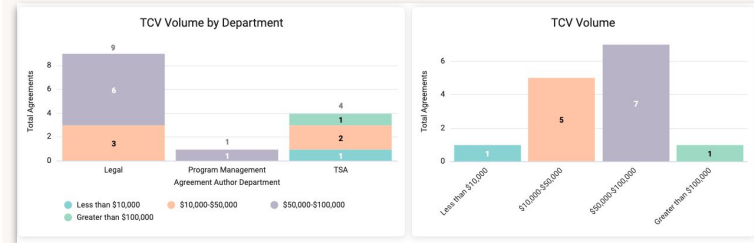
# Department | Agreement Insights

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.

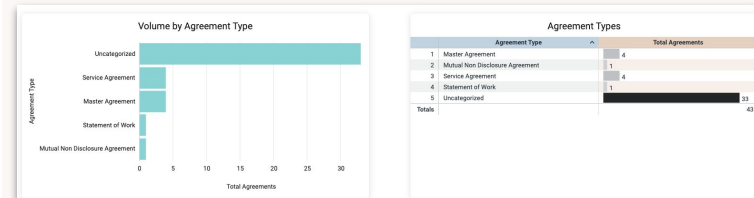
- **Product:** Finalize
- **Ideal Users:** Legal Ops, Corp Counsel, Paralegal, Contracts Manager, Analyst



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

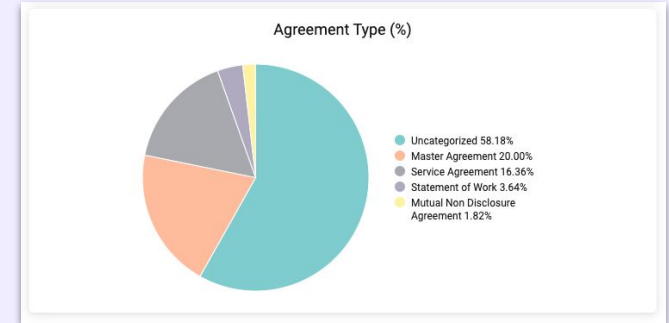
#### Agreement Type

- 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	Template Name	Agreement Counter	Status	Updated Date	Author	Agreement Date	Agreement Owner	Present Collocated	Activity Type	Last Activity Date/Time	Question ID	Who is the counterparty point of contact?	Who is the counterparty located?	What is the counterparty?
Carroll	LinkSquares Master Service Agreement (2023)	2024	Invoic	2024	Andria	2024	Syrite	Andria	2024	4/7/24	4812	USA	USA	\$10,000
Samra	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Andria	2024	Syrite	Comp	2024	4/8/24	4812	USA	USA	\$10,000
Phara	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Laura	2024	Syrite	Comp	2024	7/9/24	4812	USA	USA	\$10,000
Mimi	LinkSquares Master Service Agreement (2023)	2024	Invoic	2024	Syrite	2024	Syrite	Andria	2024	4/8/24	4812	Carvins	Carvins	\$10,000
Mimi	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Syrite	2024	Syrite	Andria	2024	4/8/24	4812	USA	USA	\$10,000
Samra	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Syrite	2024	Syrite	Andria	2024	4/8/24	4812	USA	USA	\$10,000
Mimi	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Syrite	2024	Syrite	Andria	2024	4/8/24	4812	USA	USA	\$10,000
Mimi	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Syrite	2024	Syrite	Andria	2024	4/8/24	4812	USA	USA	\$10,000
Mimi	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Syrite	2024	Syrite	Andria	2024	4/8/24	4812	USA	USA	\$10,000
Mimi	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Syrite	2024	Syrite	Andria	2024	4/8/24	4812	USA	USA	\$10,000
OSB	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Syrite	2024	Syrite	Andria	2024	4/8/24	4812	USA	USA	\$10,000
Booth	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Syrite	2024	Syrite	Andria	2024	4/8/24	4812	USA	USA	\$10,000
OSB	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Syrite	2024	Syrite	Andria	2024	4/8/24	4812	USA	USA	\$10,000
Dixie	LinkSquares Master Service Agreement (2023)	2024	Ready	2024	Syrite	2024	Syrite	Andria	2024	4/8/24	4812	USA	USA	\$10,000
Janice	LinkSquares Master Service Agreement (2023)	2023	Ready	2023	Syrite	2023	Syrite	Andria	2023	4/8/24	4812	USA	USA	\$10,000
Janice	LinkSquares Master Service Agreement (2023)	2023	Ready	2023	Syrite	2023	Syrite	Andria	2023	4/8/24	4812	USA	USA	\$10,000
ABC L	LinkSquares Master Service Agreement (2023)	2023	Ready	2023	Syrite	2023	Syrite	Andria	2023	4/8/24	4812	USA	USA	\$10,000
Edgar	LinkSquares Master Service Agreement (2023)	2023	Ready	2023	Syrite	2023	Syrite	Andria	2023	4/8/24	4812	USA	USA	\$10,000

LinkSquares Master Service Agreement (Tokens Answers)

Agreement Name	Template Name	Agreement Counter	Agreement Status	Status Updated Date	Agreement Author	Agreement Owner	Recent Collocated Update	Activity By	Last Activity Date/Time	Answer ID	Answer	Answer	Answer	Answer	Answer
Samra 11	LinkSquares Master Service Agreement (2023)	2024	Ready	2024-05-01	Andria	Syrite	Syrite	Syrite	2024-05-01	4812	May 01 2024	ABC Inc	123 Street	ABC	USA
Samra 12	LinkSquares Master Service Agreement (2023)	2024	Ready	2024-05-01	Andria	Syrite	Comp	Andria	2024-05-01	4812	May 01 2024	ABC Inc	123 Street	ABC	USA
Phara 10	LinkSquares Master Service Agreement (2023)	2024-05-01	Ready	2024-05-01	Laura D	Syrite	Bob Max	Comp	2024-05-01	4812	June 18 2024	Phara Market	53 Main St	Phara	USA
Mimi 10	LinkSquares Master Service Agreement (2023)	2024-05-01	Ready	2024-05-01	Andria	Syrite	Bob Max	Comp	2024-05-01	4812	May 01 2024	ABC Inc	123 Street	ABC	USA

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*

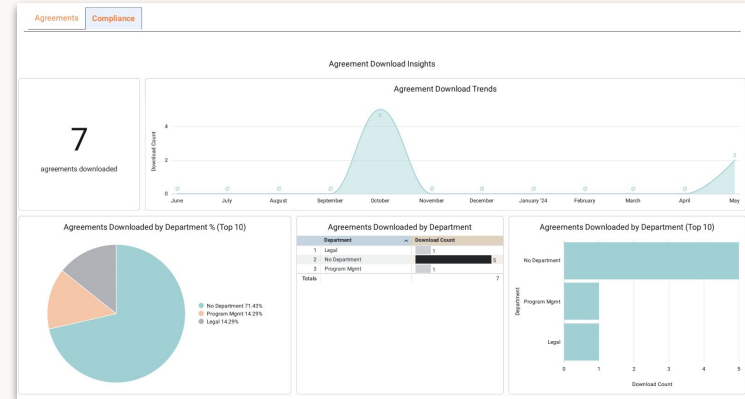
# Analyze Themes

# 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	0	213	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 - viewed	5	0	13	1	5	1	8	7	0	0	0	0
10	API Key - created	0	0	0	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	Renewing Settings - changed	0	0	0	0	0	0	0	1	0	0	0	0
14	Tag - created	0	0	0	0	0	0	1	188	0	0	0	0
15	Team - created	0	0	1	0	1	0	1	5	0	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 2024-05-08 15:58:51	LinkSystems Team	No Department	User - disabled	Robert Kaufman was disabled		User - disabled
8 2024-05-08 15:57:09	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 15:44:35	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 2024-05-06 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. - Modifi...		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	LinkSystems Team	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