



Dolphin
365

Gold
Microsoft
Partner



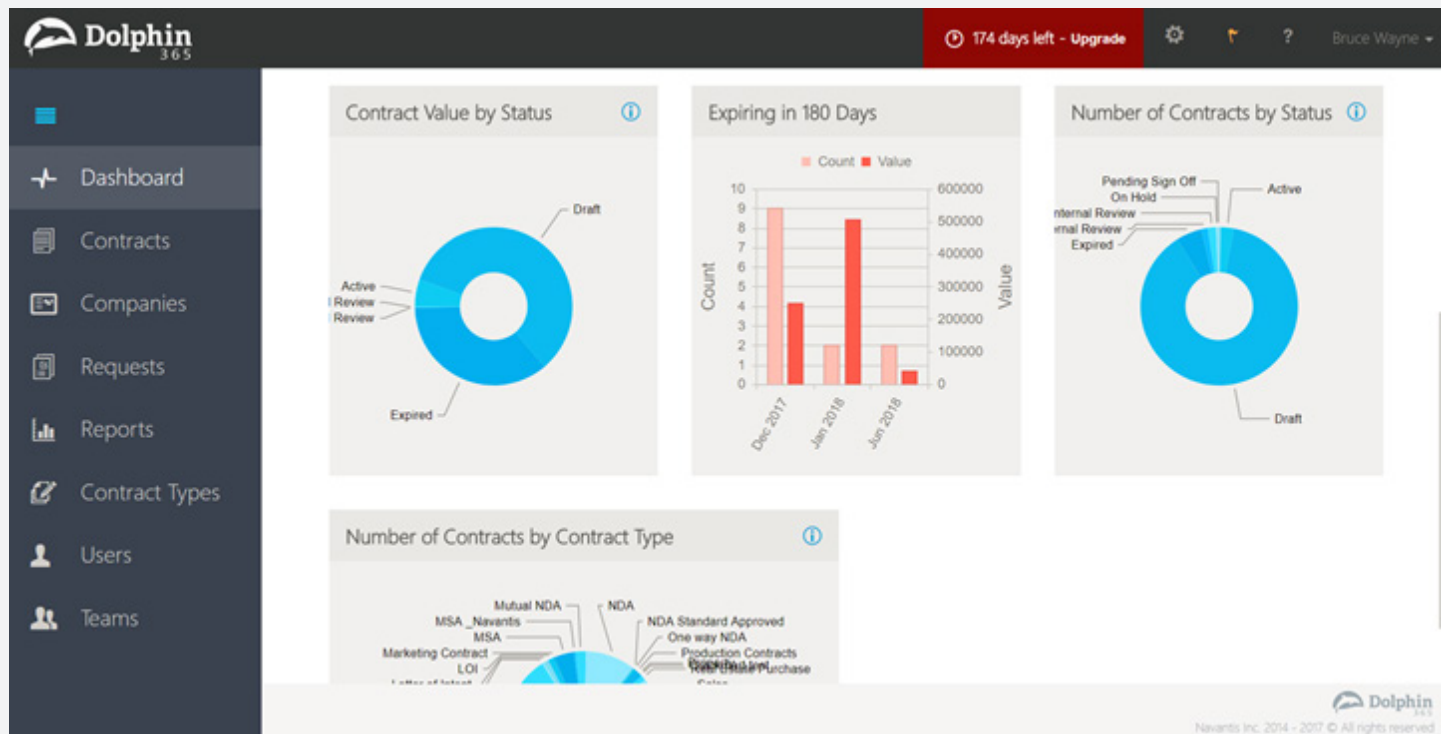
Contract Manager Data Sheet



Introduction

Dolphin 365 is a feature-rich enterprise software application, custom developed to work in concert with the Microsoft Office 365 platform. Dolphin 365 covers the full contract life-cycle from request, creation, approval, storage, reporting and ongoing management of all types of contracts. Dolphin's tracking, alerts, reports and dashboards enable you to effectively manage all your contracts and their content including dates, events, milestones, obligations, and much more – providing you with operational efficiency benefits as well as visibility into detailed management and risk insight.

As a custom designed and built application, Dolphin 365 takes advantage of the investment you have already made in Microsoft Office 365. As a turnkey solution, you are up and running in 15 minutes and can immediately begin managing your contracts for quick return on investment to your organization.



Dolphin Contract Management Software Scope

With a flexible configuration, Dolphin also has some options to deliver tuning to each client's specific project needs. Dolphin functionality empowers managers to define permissions and security to a client's specific needs and can be configured separately for each project.

For any specific needs, our expert Dolphin team is available to support configuration tuning and integrate these needs into an accompanying project Statement of Work.

High Level Functionality Out-of-the-Box



Contract Repository

Centralized document repository stores all agreements and supporting documentation in one secured space. Real-time filters and search makes it easy to find any contract in a few clicks.



Metadata Repository

Metadata repository powered by Microsoft SharePoint Online enables you to create custom metadata across various data types and using your familiar terminology.



Contract Types

Pre-packaged with a variety of Contract Types so you can begin drafting agreements immediately. Additionally, create custom Contract Types tailored to your unique organizational conventions.



Contract Creation

Self-serve Wizard or Upload based contract creation editable in Microsoft Word (WORD 2013/2016.) Contracts can also be conveniently uploaded in bulk via drag & drop.



Metadata Management

Easily create and manage your custom metadata directly via Dolphin's easy to use Manager interface.

High Level Functionality Out-of-the-Box



Currencies

Standard default list of international currencies and their accepted abbreviations is provided with capability to add additional or custom currencies.



Parent Contract Linking

Contracts can be linked to establish Parent Child relationships to model Master contracts and sub-contracts.



Clause Library

Create, store and reuse your clauses when drafting agreements in the click of a button using our Dolphin Compose Clause Management Companion App.



Jurisdiction

For determining contract jurisdiction, a default list of countries is provided. This list can be amended as required through the admin tool.



Contract Parties

The creation and management of Contract Parties is accomplished through a dedicated Company list in Dolphin. Store Contract Parties' names, logos, address information and more.

High Level Functionality Out-of-the-Box



Alerts

A standard set of date-based alerts are packaged with the system, automating termination-based task reminders or emails to key stakeholders.



Notes

Store time, date and username stamped notes associated to contracts.



Oversight Dashboard

The oversight dashboard showing contract metrics for upcoming expirations, "My Contracts", Contracts by Status and Value, Contract Counts and Obligations.



Workflow

Route contracts for review and approval across key personnel or teams to streamline your negotiation.



External Collaboration

Invite external parties to a secure and convenient collaboration space to quickly finalize negotiations.

High Level Functionality Out-of-the-Box



Administration

A comprehensive administration tool is delivered standard. This tool allows the creation of new contract types and the creation and editing of contract metadata objects, amongst other functionality.



Reporting

A set of detailed contract related reports are provided as standard. The reports are listed below. Users can create and save custom reports based on unique filters or properties within the system.

- Contracts by Status, Value and Count
- Contracts by expiry date
- Contracts expiring in 30 days
- Expired contracts
- High-risk contracts
- Obligations due in 30, 60, 90 days
- My active obligations
- Contracts by contract type (Client custom types + custom metadata for ad hoc printing to Excel)
- Custom report generation - user-defined data filters based on system metadata

Dolphin 365 User Types

The following three types of Dolphin 365 users are available to establish administrative ownership, access and security levels. User types can be configured by the Manager level based on the need by each user.

USER TYPE	SUMMARY DESCRIPTION
Manager	<ul style="list-style-type: none">✓ Full user super rights✓ Can create new contract types and create / upload their templates✓ Can manage users - add / remove personnel for site access✓ Can manipulate contract permissions and access✓ Can create or upload new contracts✓ Can edit and redline contracts✓ Can create new and update key reference information such as parties, metadata, obligation and tasks
Business	<ul style="list-style-type: none">✓ Can create or upload new contracts✓ Can edit and redline contracts✓ Can create new and update key reference information such as parties, metadata, obligation and tasks
Reader	<ul style="list-style-type: none">✓ Can read contracts✓ Can submit contract requests

What Can Users Do?

	MANAGER	AUTHOR	READER	ADMIN
Contract Request				
Request a contract			✓	
Contract Creation				
Receive contract request, approve and create a contract	✓			✓
Create contracts via the Contract Wizard	✓	✓		✓
Create contracts from templates, other parties' contract, or blank document	✓	✓		✓
Upload executed contracts to the contract center repository	✓	✓		✓
Create contract party	✓	✓		✓
Delete Companies	✓	✓		✓
View Company Details	✓	✓	✓	✓
View Associated Contracts for a Company	✓	✓	✓	✓
Working with Contracts & Documents				
Edit / redline contracts	✓	✓		✓
Read contracts	✓	✓	✓	✓
Delete a contract	✓	✓		✓
Upload new contract versions from other party	✓	✓		✓
Download a copy	✓	✓	✓	✓
Share	✓	✓	✓	✓
View templates	✓	✓		✓
Version History				
View version history	✓	✓	✓	✓
View previous versions	✓	✓	✓	✓
Compare two versions in History	✓	✓	✓	
Restore previous versions	✓	✓		✓
Delete previous versions	✓	✓		✓
Create and add comments to new versions	✓	✓		✓
Publish a major version	✓	✓		✓

What Can Users Do?

	MANAGER	AUTHOR	READER	ADMIN
Workflow				
Start a workflow	✓			✓
Receive, approve, reject a workflow and add comments	✓	✓		✓
View the contract from the workflow alert	✓	✓		✓
Alerts and Tasks				
Receive date alerts	✓			✓
Receive obligation alerts	✓	✓		✓
View Contract Metadata				
View contract metadata	✓	✓	✓	✓
View supporting documents	✓	✓	✓	✓
View obligations	✓	✓	✓	✓
View notes	✓	✓	✓	✓
Edit Contract Metadata				
Add / edit contract metadata	✓	✓		✓
Add / delete supporting documents	✓	✓		✓
Add / edit internal comments	✓	✓		✓
Add milestones	✓	✓		✓
Add / edit obligations	✓	✓		✓
Add / edit notes	✓	✓		✓
Reports				
Run reports	✓	✓	✓	✓
Print reports	✓	✓	✓	✓
Export reports to XML, CSV, PDF, Excel, TIFF, WORD, MHTML	✓	✓	✓	✓
Create custom personal reports	✓	✓		✓

What Can Users Do?

	MANAGER	AUTHOR	READER	ADMIN
Search				
Search all contracts and metadata in the contract center repository	✓	✓	✓	✓
Browse for contracts	✓	✓	✓	✓
Filter for contracts	✓	✓	✓	✓
Admin / Technical / Configuration				
Provision tenant / First time setup				✓
Upgrade tenant				✓
View invoices				✓
Add Users				✓
Remove Users				✓
Change User Roles				✓
Create / delete Contract types	✓			✓
Create / delete / update metadata fields	✓			✓
Assign metadata to Contract types	✓			✓
Set permissions	✓			✓
Create new templates	✓			✓
Configure alerts	✓			✓
Support				
Create support tickets	✓	✓	✓	✓
View help videos	✓	✓	✓	✓
View help wikis	✓	✓	✓	✓

Summary

Businesses are built on contracts, and a contract is a promise to a client. Keeping these promises builds credibility with customers, ensures all on the team are aligned on obligations and helps organizations continue to grow their revenue stream. The ability for a company to avoid missed contract obligations is facilitated by adopting an automated, collaborative, alert-optimized solution such as Dolphin 365. If you're still managing your contracts manually or you have a solution that isn't delivering what was promised, contact the Dolphin team today and find out what you've been missing.

