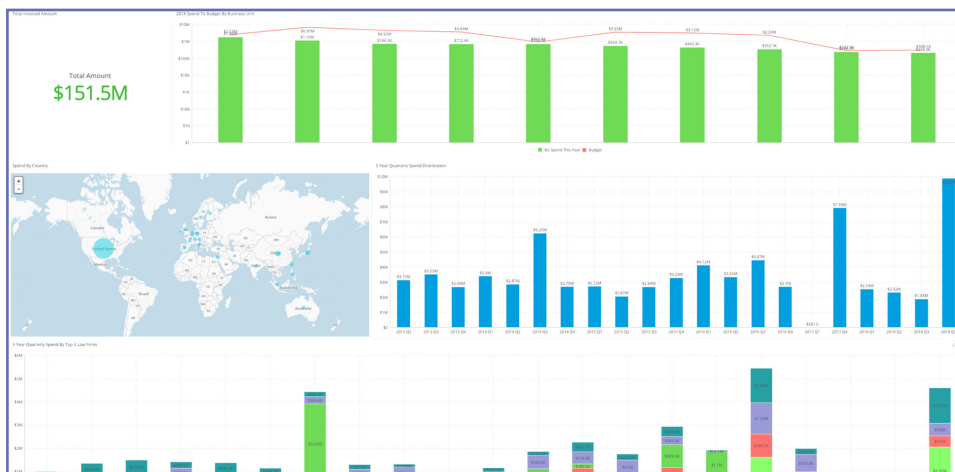


# AQX Financial Management

## DATA SHEET

At Anaqua, we understand that Intellectual Property is a tool for driving business success across the entire organization. In order to do this effectively, the single biggest strategic tool at an IP team's disposal is your budget and, more specifically, how you allocate it monthly, quarterly, and annually. Moreover, capturing and analyzing previous and future spend data better informs your prosecution, maintenance, and portfolio management decisions.

Anaqua's Financial Management solution supports the IP team's full spend life cycle including Budgeting, Cost Estimates, Accruals, Invoicing, and Authorization Chain for invoice approval workflow.



## Anaqua's Financial Management Capabilities

### Budget "Over the next Year, this portfolio will cost..."

- Annual budget
- Anticipate Annual and Quarterly Spending
- Use with all modules

### Accruals "Over the next [3,4,5,6] Months, this MATTER will cost..."

- Anticipate Monthly or Quarterly Spending
- Costs that can't be anticipated
- Matter Level Tracking
- Best with Conflicts and General Matters



**INNOVATE**



**PROTECT**



**OPTIMIZE**



**STRATEGIZE**

### Cost Estimates “Over the next [3,4,5,6] Months, this TASK will cost...”

- Point in Time
- Expected Costs (Office Action, Fees, etc.)
- Task Level Tracking
- Best with IP Modules

### Invoicing “What it ACTUALLY COST”

- Allow multiple invoices in one upload file
- Easily attach image files
- Better error reporting
- Configurable validation rules
- New Admin invoice upload to help with data migration
- Configurable AQX Upload Template
- Support for LEDES 98B and 98BI, LEDES XML 2.1
- Short Code to make upload easier

### Authorization Chain Workflow

- Require multiple individuals to review an invoice
- Authorization chain based on the Manager on the Contact record
- After X days, the invoice is automatically assigned to the Manager
- Require at least X number of authorizers to review based on amount

### Reporting

- Leverage Anaqua’s Standard HyperView Dashboard library for access to pre-built reports you can take and further configure to your specific needs
- Quickly build ad-hoc dashboards and reports to better understand where you’re spending your IP dollars.

Anaqua’s Financial Management tools provide visibility, insight, and control to capitalize on opportunities that ensure your freedom to operate and enable you to protect and monetize your brands. Depending on your goals, these tools are configurable to your needs, and our APIs enable you to integrate with other solutions to fit your existing application stack and processes.

022024