Rightsline: Innovation in Action

Speaker Directory

Speaker Name	Role
Corey Carter	Webinar Host
Jeremy Tipton	Product Leader
Mike Sumner	Product Leader
Kritica Kulshrestha	Product Leader

Full Webinar Transcript

Introduction & Welcome

Corey Carter: Hello, everyone. Welcome into our webinar event today. Good afternoon. As we're going through things, please feel free to share in the chat where you're coming to us from. It's always nice to hear where people are coming from. And there we are. Just having a little problem with my screen. I apologize. But hello. Good morning. Good afternoon. Wherever you're coming from, my name is Corey Carter, and I am your host today for innovation in action. This is our recap of the first half of twenty twenty six, the first half of the year. We're going to be walking through all of the wonderful innovations, features, functionality that we have released as well as a little bit of a preview of things to come from Rightsline over the next, few quarters.

Corey Carter: I am joined today by a couple of our product leaders, and I'm going to introduce them to you shortly. But just to give you a sense of where we're going today on this wonderful journey for about forty five minutes or so, we're in the midst of our welcome and introduction. I'm then gonna be kicking things over to Jeremy to talk through some of the road map themes that Rightsline is really focused in on for this year just to give a sense, of where things are going. Then we're going to be talking about some of the, different things that we're gonna be showcasing. So we're gonna start going through items like usability enhancements, reporting and data share, statement ingest, product approvals, advanced financials, all things AI, and then we're going to get a preview of what's to come. So we're gonna talk through AI contract ingest, task management, and then we're also going to be going through a q and a near the end of today's event.

Corey Carter: I do see some hands up in the chat. I wanna make sure that I am cognizant of what's going on there. The audio is doubling. Interesting. I'm not sure how to fix that. Kritika, could I have you go on mute really quickly, and we'll see if that fixes it? Perfect. How is that now? If someone can just let me know in the chat. I apologize. These things happen. I suppose I should keep talking for the sake of letting people know whether or not the audio is doing anything. To that person in the chat, are you good? Is everyone else good? If someone could just let me know in the chat if we're good to go. Yeah. Maybe Heidi needs I need should Heidi leave and rejoin? Yeah. I was gonna say I'm like, most yeah. It seems, Heidi, this might be you. So feel free to just drop out and then come back in, and, ideally, that'll fix things. But we're gonna keep moving and grooving in the meantime.

Corey Carter: Perfect. So sorry about that. With me today are some of our leaders in the product team. So I have Jeremy, Mike, and Kritika joining me today. They are going to be going through all of the wonderful innovations that are coming to Rightsline. And then, again, I am your host, Corey Carter. Just to give you a sense, I know that there's a significant number of customers that are in our room, but just in case there are people who don't know who we are, we are Rightsline. Rightsline is the only SaaS platform purpose built to simplify, manage, and maximize IP commerce, meaning that we help organization, like many of you, manage both the right side as well as the financial side of royalties in one place. We serve over three hundred customers, and there's a good contingency of those in this room today. And we help them to manage over forty billion dollars in royalties, seventy five million rights agreements, not dollars, and one hundred and fifty million IP assets managed. Our team is over three hundred people strong, and we have offices all over the world, including New York, Boston, Toronto, or Toronto, depending if you're Canadian, Los Angeles, London, and Delhi. We are trusted by some of the world's largest media and entertainment companies, publishing consumer brands to handle everything from rights visibility to royalty calculations, accrual, and reporting by lending a hand in solving for complex, unique, and high volume licensing agreements. I would like to now transition things over to Jeremy to kick us off.

2026 Roadmap Themes

Jeremy Tipton: Great. Thank you, Corey, and thank you all for joining us at this midpoint of the year to reflect on what we've been building alongside all of you and what we're eager to deliver in the back half of the year. So the vision for the Rightsline twenty twenty six road map is to transform our platform from what it has been for many years, the source of truth for rights, catalog, and deals into the system of intelligence that tells you what to do next, surfaces hidden revenue opportunities, and helps you maximize the value of your IP portfolio.

Jeremy Tipton: So this vision is guided by three pillars. If we go to the next slide. These pillars are eliminating silos for our customers, many of whom are operating in a fragmented landscape where completely separate teams track rights, royalties, financials, and others with disconnected tools and workflows. We are unifying all of that into a single collaborative experience, which leads to our second pillar, removing financial friction in particular. We are enhancing our accounting automation and interweaving the royalties engine controls into our modern rights line app. And the third theme, scaling operational efficiency, is where we're embedding AI throughout the entire platform and also launching additional collaboration tools.

Jeremy Tipton: Alright. So if we move forward here, the product team is obviously really eager to provide to preview some of these future offerings. But first, we're gonna take a look back at what we shipped in the first half of the year across a few different categories. First category being general usability enhancements. So as always, we cherish all of our customers' candid insights about how we can make IP commerce management as quick and intuitive as possible. This year, what emerged were usability enhancements for business users such as dark mode, clearer controls for shared grid views. And simultaneously, we expanded our already super flexible configuration with capabilities such as support for a new identifier data type that reduces the need for translation to rights line system IDs as you're making associations and doing other operations throughout the system, and the ability to clone an entire workflow process among many other, you know, features here and there enhancements. So let's move on now to AI and dig right oh, I'm sorry. Apologies. I think I had the wrong order here. I'm gonna hand it off to Mike now to talk about reporting, and then we'll circle back to AI. So go ahead, Mike. Talk to us about Sigma.

Jeremy Tipton: You're on mute, Mike.

Sigma Reporting Module & Snowflake Data Marts

Mike Sumner: I'm on mute. Wouldn't be a video call without someone being on mute. Great. So, with our new reporting module, we have been very conscious of the value of the data that we are holding for our customers and how challenging it can be to make sure that you're getting all of the insights that you want from it. This is an area that our customers have been telling us they would like to see improvements in for a while, and we have set out to find the strongest reporting option to cover all of your requirements, and we are thrilled with what we've come up with. We had a really big challenge in that we needed to be able to facilitate both flexibility and ease of use. And this can be a really big challenge as every time you add additional capabilities, you will tend to increase the complexity of the offer.

Mike Sumner: We found that Sigma does a great job of bridging those gaps. For the simplest reporting, you can open up a supplied data model, select your required fields to show them in a table, pivot table, or chart. And for those of you who are comfortable in Excel, you'll find the interface very straightforward. You can add calculated columns, apply filters, and generally interact your data in a way that feels very familiar right out of the box. For those of you who are less confident with Excel, writing formulas, and all of that general reporting, there are capabilities to make use of AI for formula writing. You can even drop AI chatbots onto your dashboard so that a consumer of the dashboard can ask natural language questions. And just a little bit further down, the road on Roadmap, there is also natural language tools for building reports, creating charts, and doing all of that work.

Mike Sumner: Now, additionally, for the real power users, when you find that those provided data models aren't cutting it for your complex analysis and you really just want the extra power and the extra control to do extra highly complex analysis, you can really quickly and easily drop back into SQL without leaving the tool. You can build it your entire report, a small portion of your dataset, anything along those lines. Even just a simple SQL function can be passed through within the rest of the function builder. So with that, we found kind of we were able to strike a really great balance between that simplicity and being able to meet the highly complex. If we could jump to the next slide. Cool.

Mike Sumner: So as part of our move on, the enhanced reporting offering, we have also replatformed our data marts into Snowflake. This is allowing us to have a modern cloud platform to work off of that can provide excellent performance and scaling while also giving the opportunity to sincerely share data directly into our customers' own Snowflake warehouses. If you don't have a Snowflake warehouse, we can also provide reader accounts to customers who want to be able to access more data directly and whether that's so that you can use your own BI tools, blend with other internal data, or build out integrations to downstream systems. As it stands today, we are currently only able to share, data shares into Snowflake databases, but we are reviewing approaches to being able to share it into others. It would be great if, some of the people on the call, on the webinar, would be able to just drop a note in the chat around what data warehouse services you're using just to give us a sense of what other services we might want to tackle first. So just sort of let us know. Is it Snowflake, BigQuery, Databricks, Spreadshift, something else? We'd love to hear what it is you're using.

Corey Carter: I apologize. I'm gonna jump in really quickly just because apparently the chat is not working. So I'll have people direct those comments into the q and a function. We can still keep track of things there. I apologize for that, that issue with the chat functionality for this webinar.

Mike Sumner: Cool. Thank you. And then I think it's back over to you, Corey.

Corey Carter: It sure is. So we are going to be demoing, some tools for you in this actual webinar event. But on the reporting side of things, we've actually already gone through and done a much more robust overview of the actual tools themselves, both contextually aligned to the products that fit within them. So we have a version for the Alliant and Royalty side, so you can see what our reporting suite looks like from that modality. And then we also have one for the right side of our business, so you can see what the reporting tools, features, functionality can look like within the Rightsline platform. These recordings will be part of the deck that'll be provided in the recording email after this event, so you can feel free to peruse those at your leisure. I believe I'm kicking things back to Mike.

Statement Ingest & Portal Workflow

Mike Sumner: Yep. Perfect. Cool. Let's just jump straight into the slide. So as we continue our efforts to support our customers in the brand licensing and consumer product spaces in particular, We built out a new importing workflow in our portal specifically for importing financial data into the system to enable our customers to have their partners submit usage and royalty statements through the partner portal. We've built it out with a focus on streamlining the challenges that we've heard our customers complain about when it comes to formatting and manipulating statements in different formats that they see from their licensees. And for the rest of our customers who are not in that space and are not actually working with challenges of having those external submissions for their import, Still pay attention on this one because this is representative of some improvements that we have in the pipeline for overall import changes that will be coming to the rest of the Rightsline app. So this is a bit of a preview window into what we're going to be seeing there. If you could just bump us along, and we can have a little look at the demo.

Mike Sumner: Okay. So what we've got here is a view into the portal, and you can see we are going to navigate through the deal and down to a table that we've got on the deal where you can actually do your upload in line, so you don't have to go and determine which table you're importing to. You're able to select header rows on files that do not have their header on the first row. There might be other information at the top of the file. Then once you select your template, you're gonna get various options here to map your headers to the columns that we're expecting. You can map different sorts of IDs or associations. You can set default values. So this licensee reporting period, we don't have that value within the file, so we've set that as a default.

Mike Sumner: As you move on to the next screen, you get all of these inline validation errors so you can see what validations have been performed. And if you look at something like this channel field, it's got no value at the bottom there, whereas it is a required field. So we are able to also default values to just fill in blanks. So instead of being blank, we're now filling that blank there with all channels. You can go through and you can just fix items in line so we can grab that date there and type in an actual corrected date so that that's gonna remove that validation error to help us proceed. We've also got options where we can just pick items from drop downs, and we've also got a find and replace if you're looking to do multiple dates, multiple dates, multiple values. So if you look in the territory, we've got United States of America that's invalid in a couple of places rather than having to go through those individually. You can do a find on United States of America. You can restrict that to search within a column or across the entire document. This is also great for doing things like removing commas or removing dollar signs from fields that should be numeric, you can go through. You can go do those, gradually update all of your data, get it valid. And then once that is all good to go, you can check by checking that checkbox to see whether there's any specifically invalid data, and then you can complete and save and move on. There we go. That is a demo of our statement ingest. And as I mentioned before, that similar import flow is going to be coming to other areas of the app over the coming year.

Product Approvals & Collaboration

Mike Sumner: Cool. Alright. On to product approvals then. So sticking with the same theme of supporting the consumer products and brand licensing space, we have also introduced a new product approvals product. It's basically, enabled to it's there to enable our customers to collaborate with their licensee partners so that their licensees are able to to submit a product design. The creative team can exchange feedback. And instead of having to exchange that feedback via email and do all of those legal and manual checks outside of Rightsline in another system where there's no central record of who approved what. We are now consolidating that. Your partner makes their submission into a secure portal. Your team can use visual markup tools to annotate the designs directly, and everything gets captured within our permanent audit trail all within Rightsline, which you are hopefully all using regularly and familiar with, and it's all connected to the rest of your data that you're able to work with in terms of your deals, your rights, inventory, and all of those.

Mike Sumner: So if we jump on to the next slide, we can look at this demo here. So right off the bat, this is looking at the project's list page. We are gonna be viewing things through the lens of the Rightsline application, but the portal view that you saw a minute ago in the last demo is all also available in the portal view where you're able to have your partners see all the same things. So we've added a tile view to these images. You can see the contents of your view and all of that extra metadata that shows on top of your tile image. And we've configured this demo with, a template that serves as a collection with the idea that you can put other product templates within that collection depending on the complexity of your product approval implementation, you may or may not want to do this.

Mike Sumner: For this example, we've clicked into a sample of a lovely Rightsline hat. You can click in. That can be uploaded by the user, and we've got annotation tools. There's all sorts of things where you can put in text. You can do some drawing. So here, we're circling a specific element. Within that. You can do circling. You can point some arrows, and then you can make comments against each of the annotation. So this is a comment specifically relating to that circle. And, additionally, if you don't want to have to draw things, we've just got sticky note comments that can be dropped anywhere onto the item. Here's gonna be one of our sticky notes, and then you can throw comments. These have all got threads as well, so you can have long comment threads with different users. Getting into each of those, you can see it's got the add a reply option at the bottom. We can save that comment, and then you can also see our regular comments tab. So Rightsline users should be familiar with our comments functionality. But what we have added here, you will see at the bottom of this is a radio button to go between internal and external comments. This will allow you to have internal comment conversations around the content that is being submitted that your partners will not be able to see in the portal. You can also have comments that are visibly tagged as external, and you can rest assured that your partners will see those messages when they log in and have a look at the portal. There you go.

Mike Sumner: So what other bits did we have here? Yeah. So we've also got some workflow. Your workflow is going to be key to ensuring that you take the products through that actual approval workflow. So this is the rights line workflow that you will all be familiar with. And whilst you're able to approve a single object, single project in the normal way, what we're demonstrating here is that we've also got the ability to take those workflow actions in bulk. So for one product trying to do a single approval on just a hat, that's quite simple, but we've certainly heard from a lot of people that frequently they could be working with large collections, large bulk submissions, and that functionality is going to allow you to go in. And once you've done all of the work manually, maybe you've looked over everything in bulk, you can process that approval all in one go for everything in there. Thank you very much. That's me.

Advanced Financials & Tax Management

Kritica Kulshrestha: So, yeah, with that, I'll start some introduction on the advanced financial side. And in before getting into the details of the new features that we have added, the next slide will talk about the overall ecosystem of advanced financials that we have implemented in the last one, one and a half year. So, for all of you, like, in rights line, we used to do the contractual part, and in line, we used to have the financial, details. But the unified platform that we are trying to build under advanced financials, in right line itself, you can do all of these activities what I'm sharing on the screen. So for example, you can define your catalog fee. You can define your cost. Once they are well defined on the contractual side, you can actually split the revenue and cost across multiple rights dimension, which are captured in the rights table. We can also do the FX conversions around those values of revenue, cost, and payments. So payment application is also now supported with the rights line, and you have your payment schedule well defined where you can track your cash, track your full or partial payments. Again, you can, apply cash receipts to it. You will see live, pay FX conversions happening for all the payments that you would be applying over there.

Kritica Kulshrestha: After the payment application, the invoicing part of it, the accounting automation has been set up, that invoices are automatically created. And based on the workflow action of Rightline, they can be now sent directly to Aligned. So that's the part of the accounting automation that we have implemented. Now in addition to that, we do have accounting processes where you can set up your general ledger codes for each of these transactions that we will be generating as part of the revenue split process, cost allocation process, and payment application process. So these automated accounting rules, they can be used to set up all send all of these details back into Aligned. Now these are the things that we are offering as part of advanced financials as of now, but these two new boxes at the end, you see window level financials and tax management. These are the two that we have added very recently in last six months.

Kritica Kulshrestha: So on the next slide, we'll I'll talk about little, about the window level financials. Again, it is to cater the needs of the client who are dealing with complex deals for multiple rights across a single catalog. So for for which is also the future where you will have multiple rights set against the catalog. And as part of the contracts, you would like to define a specific amount against each set of rights. So to take care of such complex rights, we have introduced a revenue allocation model. So currently, does support cat revenue allocation by catalogs, like, evenly by catalog, where each catalog is given an equal split share. And, similarly, we do have revenue allocation by rights duration. But in this model, what we are trying to do is we are going very specific within a specific amount against a specific set of rights.

Kritica Kulshrestha: So in order to achieve that, I can show it that on show that to you on the screen that what are the steps to follow. So over here, we all are familiar with the rights table that we have on the right side where you can define your specific rights media territory language along with the rights ID, which is like a unique identifier for each row. On the accounting table side, on the catalog feed, this rights ID input can be used to map the rights table with the catalog feed table. And once you populate it, all media territory, language details are populated as such. Now you can do it one by one, or you can use this bulk operation where users will be provided with all the possible rights rules to select from, and they can select and they can specify a specific catalog fee against each of the right set, which they have defined on the rights table. After this definition is done, I just created for the sample, your catalog fee table is all set. On the payment schedule side, on the run revenue allocation option, you will get an additional option that is split the allocations by the rights ID. Again, by you can use any calculation method, and you can see in the output that each of the asset is assigned specific amount, which you specified on the catalog fee against the right set that we have over there. Once that is all set, all of these details can be seen in the allocation table that we had at the bottom. So it's a powerful way of splitting your, catalog fees by specifically by right side. So this is the first feature.

Kritica Kulshrestha: Then we can move to the next feature, which is the tax management part. Again, to, to bridge the gap between, aligned and, rights line, what we have done is we have added, tax management as part of the unified platform. And these tax management screens, they are tied down to the accounting processes of each of the contact. So now you can set up a specific tax type on the contact on on their respective accounting processes. And, the challenge that we are trying to overcome over here is that in the past, when we didn't have the tax management as part of the rights line, users were generating the, invoice out of the right rights line, but eventually, they had to apply the specific tax manually amount manually. And it was complicating the closing process, and it was complicating the reconciliation process. So, again, if you look at the demo over here, the way we try to achieve this is to have the stacks management screen, in the accounting processes section. Only if you opt for in case if you do not have need, there is an option to disable it. By amount template, by the template, by address types, and contact template, you can set up multiple tax types as you can see in the grid. Once they are set, you can go to the tax rates where you can actually apply the number of tax, like twenty percent of our GST and minus five percent withholding tax. You can do it by region. You can also have a specific period, assigned to the tax in case the regimes are changing.

Kritica Kulshrestha: Once that all is set on the invoice side, whenever there is the billing contact which matches with the Act Pro setting, system will automatically add all the respective applicable taxes to your amount table where you can see the blank values. Now as part of the workflow process, if we will call the required extensions, and once everything is met, like, the prerequisites are bad met, sorry, in that case, system will generate the amounts. So you can see a summary of total tax, total amount, tax balances right at the top in this detail section. And if we scroll down, in the amount section, you can actually see the values populated for VAT, GST, withholding tax, what you have defined on the actual screen. And, similarly, when the invoice will be generated by the application, automatically, all these values will also be part of the invoices. So yeah. So with that, I'll take it send it over to Jeremy. Yep.

AI Companion & Contract Ingestion

Jeremy Tipton: Alright. Thank you, Kritika. Yeah. Obviously, we're zooming through a lot of features that's here, so remember to jump into the QA if you have questions about any of these in particular. I'm going to keep on rolling into AI. So our currently available AI companion now empowers anyone on your team to understand the complexities of your deals, catalog, and rights availabilities and to uncover hidden revenue opportunities in your IP portfolio. It operates in a secure closed loop environment so it conveys its responses on your real data in the particular way you organize it in Rightsline. So AI product owner, Natalie Somieda, couldn't attend today, but here is her prerecorded introduction to our AI chats.

Natalie Somieda (Pre-recorded): *With proper intelligence center permissions in place, AI chat functionality is available for use on individual catalog and deal records as well as in Rights Explorer. When on a deal record, engage with the AI sparkle icon in the side panel to prompt the chat interface. Choose your response mode, detailed language or concise. Choose your source, the detailed information, or an associated PDF. Click the start chat button to begin engaging with the chat functionality. Ask questions like, tell me all the dates mentioned on this deal, or you can ask something like how many rights out do I have on this deal, or change your source and ask questions about the contract PDF. You can ask for help by requesting it to do something for you, like draft a short email to the legal team summarizing the top three risks identified in this contract. The LLM will reference the associated document and come back with a response.*

Natalie Somieda (Pre-recorded): *Rights Explorer is also AI powered. Stay in classic mode to engage with a criteria assistant and chat with your results or switch to AI mode where the entire interface transforms into a natural language experience. Simply ask questions about your availability and skip the manual criteria building and avails rose sifting altogether. Clicking on this AI icon, you can type in a few parameters like media, territory, a date range, and some catalog items, and the criteria assistant will preselect some items for you, and you can choose to apply them to your overall selected criteria. Once you've run an avails query, you can also engage with the results chat in the results panel. You can try a question like, why can't I sell a certain title? The response will come back with a full explanation to your question. If you are looking for a completely chat based experience where all you have to do is engage in a back and forth conversation, switch over to AI mode by engaging with the AI mode toggle in the upper right hand corner. Start to type out what you're looking for, and the LLM will build your query for you and come back with an overview and allow you to ask questions.*

Corey Carter: Now I'm back with a polling question this time. Perfect. So I am going to pop a poll up on the screen for our audience. This question is fairly simple. We just showcased contract ingest to you. What we're trying to figure out is would you be interested in seeing more about contract ingest? So what we're looking for right now is we wanna ensure that this tool and the features and functionality that are present in it are really useful to customers and prospects alike. So what we're looking for is not just necessarily showing you a deeper dive, but also garnering feedback. What do you think? How does it work for you? Do you feel that it's going to potentially provide value to your organization, or do you feel that there's something lacking, something missing that we could potentially use as feedback? So it's really important that we get some additional, answers on this polling question. So I'm going to leave the poll up for a little bit longer, but seeing a lot of people that are saying that they're interested, which is lovely to hear. Again, we're really just looking for additional feedback from people to have a better understanding of is this tool best of breed and going to support your mission, your goals, and where your organization is going in the future. So I'm going to leave this on screen for another, let's say, ten seconds, fifteen seconds. Really appreciate everyone that's been responding thus far. This is great feedback. I am going to close the poll in three to one. I probably don't need to present the results to you, but thank you to those of you that have said yes, and thank you also to those of you who have said no. Now is not the right time. That's totally fine. We hope that you'll potentially, assess contract and adjust in the not too distant future. I will then hand things back to Jeremy.

Task Management

Jeremy Tipton: Alright. Thank you. Final section before we can really dig into q and a. So task management, another feature we have planned to launch very soon. Over the past couple years, several rights line customers have explained the challenge of multiple departments collaborating on on the same records. Do you wanna go ahead and jump into the next slide there? Yeah. So for instance, a a deal that requires approvals from business, finance, legal, all in a particular order, sometimes in sequence, sometimes in parallel. And it could be other records too, data entry against the same catalog or cleaning up information about contacts in the system. So this feedback led to an automated task management tool set. It extends our workflow configuration with formalized mechanisms to hand off work between team members and to gate record workflow progress based on required tasks. So I'll show an example of this tool set now applied to the case where our royalties engine generates payments that need approval routing. But these tasks can be automated for any module lever level record, like I said, for deals, catalog, contacts, any of those.

Jeremy Tipton: So let's go ahead and start the video here. As I said, I'm going to be showing this in the case of a payment record. So it's under the workflow process training to an accounting document. And what you can see here is we have the natural tab the preexisting tabs. We've added a new tab called tasks. I'm gonna create a task operation here. I'll call it payment approval. That's generally what we're doing. And there's we need to select an action on the module record that will kick off all of these tasks that could get created. In this case, we'll say someone takes the action and wait approval on the accounting document. It will create all these tasks, and it can block other tasks on the module record, which is a big part of this. Right? So I don't want anyone to be able to approve this this payment until all the tasks underneath that are done. Now how do I define what the tasks are, who gets them, how they are determined, if they are created or not?

Jeremy Tipton: I have two different tasks that's configured here. So you would ideally configure these each mutually exclusive conditions. One might be pretty simple. Anything that's in Australia or or United Kingdom or Australia goes to a certain group. Otherwise, if it's more complicated, then maybe it goes through a different routing structure. So I'll get into the more complicated one here. So, optionally, you can add these conditions here. And what I'm saying is let's go take a hop into associated records such as a party, one of the parties on there, the country on that contact, on that party, on the accounting document, if they equal certain values that are in North America, if the amount underneath that is under over five thousand, and if it's a certain deal template. That will kick off these tasks below on that record, such as initiating the payment the initial payment review by the administrator role. So you can set the assignees to users, specific users, or everyone in a in a workflow role, some combination of both. And you can then specify for that task how many people in that group need to con to complete it. So maybe we need three people from the administrator role to complete it or just one. And then between the tasks in that task set, can they all be done at the same time, or do they need to be done in sequence? Lower sequence numbers have to be done first, and they block the the the lower numbers the higher numbers rather. You can even have due dates on them. So a lot of functionality that it built into this.

Jeremy Tipton: Again, in this example, I've got two different tasks that I expect you created if I take the work the workflow action await approval on one of these records. Now there are a few places you can look at these tasks. From any list page, you can see the tasks that relate to records of that type. So here, I'm looking at all the payment approval tasks, task sets here, which I can collapse by task sets, I can go into individual tasks. I can see mine only, or I can see what other other things my team is assigned to do. And I can see what the tasks are, what records they they live on, and I can see a kind of a tracker here of are they assigned? Are they blocked? Are they uncompleted? In this case, we can see that an administrator is assigned to do the first one. And until they do, they're gonna be they're they will be blocking the second set of tasks. Right? The final pain payment approval there. You can clearly see what it blocks on the module record itself. In this case, a couple actions. And you can see a tracker for has anyone completed this task from the task set.

Jeremy Tipton: So lots of visibility built into it. You can complete the task from the dashboard, or you can go to an individual record. And from here, you can complete any tasks to which you have been assigned. So if I'm a part of the workflow role or one of the users assigned that, I can create create those tasks. What's gonna what's gonna happen again is I'm going to be blocked from or rather the the actions will be obscured for me. I won't be able to see certain actions where anyone everyone will be those will be hidden for everyone until the blocking actions are cleared. So as we complete these actions, all of them are gone. After a refresh, we'll see that those actions now are available. So I can now finally do the true approval of this overall record. There we go. Or I can make it available for payment or whatever the next actions might be that were previously blocked because of those required approvals, those required tasks. So in nutshell, that is all of the task functionality. We are planning to enhance this more after the initial launch, which will be in the next couple months, so stay tuned on that.

Jeremy Tipton: Alright. So I think that's all of the features that we wanted to highlight from the last half of the year and preview of the upcoming few months. Yeah. I'll turn it back over to you, Corey, as we kinda wrap it up and go through q and a.

Q&A and Closing

Corey Carter: Perfect. That's great. Mike's actually been answering a lot of the questions in the q and a thus far, so there's not really a lot to be answered yet. He's, in fact, typing an answer right now as we speak. We're we're doing it live, definitely. For the sake of our attendees today, get in touch with us. If there was anything today that you saw that you have more questions on, you want to see more of a deep dive on, you want to gut check or test out more, feel free to reach out to us. That can be done via either your dedicated customer success rep, your account manager. Or if you don't happen to have one of those or don't know who that is, you can always reach out to us solutions at rights line dot com. That is solutions at rights line dot com if you would like to see anything more of what we showcase today. As I'm vamping for time, if there are any questions about anything that we showcase today, feel free to get those into the q and a. I once again apologize for the fact that the chat was disabled during this very strange happenstance. Zoom happens sometimes. We make up for it. But here we are. My first question just as we're waiting for things in, Jeremy, Mike, Kritika, do you guys sleep? It seems like the product team has been doing a lot this first half of the year. How are you all feeling? Do you feel good? Are you well rested?

Mike Sumner: Like a toddler and a newborn, no.

Corey Carter: Fair.

Jeremy Tipton: My kids are a little older, but these these features are my children. So I have I have lots of them to keep track of. But it keeps me energized. Right? This is

Corey Carter: Perfect.

Mike Sumner: Yeah. No. It's been a it's been a really fun and exciting year. I think a lot of companies and a lot of product roles spend a lot of time keeping the lights on and making small incremental changes. And I don't know if I speak to the rest of the team, but I've felt really fortunate to be able to sink my teeth into a few of these really large, really exciting projects that I think should bring a lot of value to our customers.

Kritica Kulshrestha: Agree. And you're also seeing only the key ones, like the major ones, and other areas are also there where we have done small little improvements here and there. So, yeah, a lot of good work being done.

Corey Carter: Awesome. Love to hear it. And that was enough time to deal.

Jeremy Tipton: I would say, yeah, one more point on this is, you know, we, if I didn't emphasize this before, we are so fortunate at Rightsline to have such a so great partnerships with all of you cuss you know, on the customer base. And we're also fortunate at this point to be able to pull from a lot of other products in our portfolio to be building the best literally the best in breed because we're kind of stealing from ourselves and learning from other products we've we've, you know, that have been out there before, kinda putting everything together to make the best, that it's ever been, for IP commerce. So it's it's a very exciting place to be in. And but, of course, the most important part of it is, having that relationship with all of you. So really appreciate that.

Corey Carter: Awesome. I will get into the actual questions and answers now. So, Jeremy, task manager can be accessed via the rights line API?

Jeremy Tipton: Yeah. So it's a good question. So, that will again, if you think about the way it it works, the every action is, kicked off by an action sorry. Every task generation is kicked off by an action. So a workflow action is something that already preexists and is obviously accessible via the API. In terms of completing a task, that's something we're looking into if we if that if there really is a business case for individually completing tasks via API. Tasks will be available for reporting purposes. We've kind of covered a lot of the standard pieces of that new special object, which is a task. But generally speaking, for what we believe the the true business case would be, yeah, obviously, you know, you configure it all within the the preexisting workflow configuration in Rightsline, and then kick it off via actions for the API. Yeah. But I would love to hear more if you have cases about exactly what you like to do via the API for tasks. So please, you know, reach out if you have more more input about that.

Corey Carter: Perfect. I'll answer this next one very quickly because this is on me. Can we get the recording? Yes. You can. The recording will be available to you, within the next twenty four hours. You'll also get a copy of the slide deck, and all the associated content that we covered today. So, yes, you will be getting the recording. It's not a matter of can you.

Corey Carter: The next question is, it's an AI question, but I think it's also a support question. My company is already testing the AI ingestion. Ingestion. My big request would be to able would be to be able to provide a playbook before the AI process starts as there are sections that my department doesn't need to have imported that could save time. Is that something that is in the works?

Jeremy Tipton: It's a great question. So I'll I'll point out that we we everyone noticed the absence of Natalie on this call right now, and that's literally because she's in a room with people strategizing what we do next with AI in terms of rolling this out. So that will definitely be part of this is how do we make sure that people are enabled, customers are enabled to take the full advantage of this, understand how it works for your business versus others, and what pieces fit for you and don't fit for you. So that's great input. Thank you.

Corey Carter: Perfect. As I'm just going to, again, kill some time to see if there are any more questions that come in for the sake of it, for each one of our speakers, what is something that excites you that's coming to Rightsline? We can go in order. Kritika, you're the first one on my screen, so I'm gonna put you on the spot first if that's okay.

Kritica Kulshrestha: You I I think the all the automation that we are doing, like, in previous versions, in other products, we have seen things doing in a manual way, but now we are going more towards the automated way of doing things. I think that's the most exciting thing. Like, skipping some steps here and there, no manual inputs. The AI thing, that is also helping us with ingesting automatically. So I think automation part is the best part, which excites me more.

Corey Carter: Perfect. Mike?

Mike Sumner: I think one of the things that I'm really looking forward to well, one, I'm looking forward to all the task management, because I think that's gonna be a big support within the product approvals feature. I think those two features coming together is really going to elevate what we're able to deliver through the product approvals. But, additionally, we've had a lot of acquisitions and mergers over the last few years, and we're really moving to a place where we're starting to collaborate much more heavily with, the engineering resources that are coming over from RSG, as well as the product resources. Pritika has joined us from RSG. And as we really move forward, you know, we we made these acquisitions. We made these new partnerships. And a lot of the goal there was to be bringing in a lot of this knowledge, a lot of experience from people who have been doing the same work as us, but coming at it from a different angle. And we're really now starting to ramp up and get the opportunity to fully integrate a lot of those RSG team members into what we're doing with our core platform.

Corey Carter: Love that. Jeremy, last but not least.

Jeremy Tipton: And, yeah, I love everything Mike and Kritika just said, so can't use those again. I might dive a little bit deeper into so we love yeah. It's definitely it's been wonderful experience integrating the teams and their knowledge base understanding of the market and our customers' needs and all that. It's it's been incredible. We're also integrating products. So, I'm also working, I have been working last few years, very very focused on integrating our royalties engine with the core rights line application, and that's also about to launch. We didn't really discuss that in this webinar here. But, what that provides us is a future where we have a platform that really where we really can start to build on even more functionality that that applies to the sure, the core rights use cases that we've always kind of known, but also other pieces of your business that might fit in such as product approvals, which really cuts across rights and royalties. Right? So it's we're an exciting place here where we're about to launch this, you know, these extensions to the platform that can kind of cover everything all in one experience. Bring and I think it's going to bring teams together and, in our experience, starting to implement people on this new what we you know, we might have you might have heard us refer to it as UUI, the unified user interface, unified platform. As we're starting to implement some customers into that ecosystem, we're finding that it's kind of a revelation to those those groups who have apartments that maybe never worked with each other, didn't realize even though they were kind of reusing the same sort of data in separate systems. So, I think this is really gonna change how how people do work, and it's really exciting.

Corey Carter: Awesome. That's great. So no more questions came in, during that. So I think we are probably fair to say that we've come to the end of today's event. Jeremy, Mike, Kritika, thank you so much for all of the work that you're doing, all of the stuff that you're putting on our road map, all of the innovation that you're bringing to our wonderful customers and prospects alike. We really appreciate it. I'm sure our customers do as well. This has been innovation in action. I have been Corey. You have all been wonderful, and I hope you have a good rest of your day. Thank you so much, and take care.

Others: Thank you.

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