

# Streamline the Entire Contract Lifecycle on the #1 AI CRM

Manage your contracts at different lifecycle stages with greater control from your CRM.

1

## Maintain Compliance

Leverage your legal teams pre approved templates and clauses. Create obligations to assure critical clauses are tracked.

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## Generate Contracts with Just One Click

Leverage the unified customer and quote information to generate contracts easily.

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## Streamline the Customer Experience

Generate contract at any stage of the sales cycle. Enable customers to easily collaborate on contract negotiations.

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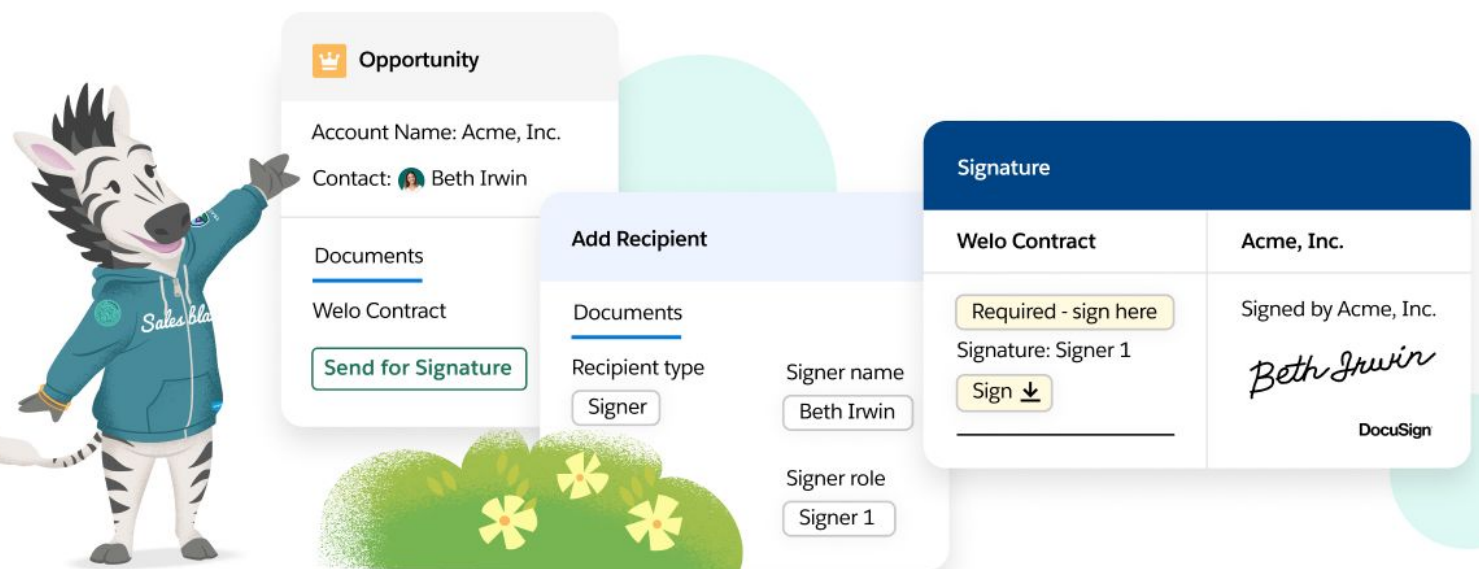
## Accelerate Approvals and Signature Workflows

Leverage automated workflows to accelerate the deal cycle with approvals and incorporate e-signature capabilities.

5

## Unify Sales, Legal, and Finance Processes

Enable teams to work from a single platform to accelerate deal cycles



The illustration shows a zebra character in a blue hoodie pointing to a sequence of overlapping screenshots representing the contract lifecycle:

- Opportunity Screenshot:** Shows account details for Acme, Inc. with contact Beth Irwin and a 'Send for Signature' button.
- Add Recipient Screenshot:** Shows the process of adding a signer, with fields for 'Signer name' (Beth Irwin) and 'Signer role' (Signer 1).
- Signature Screenshot:** Shows the final signed document with a signature from Beth Irwin and the DocuSign logo.

# How Can You Streamline the Contract Lifecycle?

## Access and Manage Contracts and Supporting Documents

- Manage different types of contracts, document versions, and supporting documents in one place with strong access controls from an easy-to-use UI
- Easily track the changes made to contract documents and data at different stages of their lifecycle

## Seamlessly Incorporate Contracting within the Sales Cycle

- Create a contract from an opportunity, quote, or order with a single click
- Generate contract draft documents from predefined document templates
- Configure an approval flow to ensure approvals are obtained before sharing any contract with a counterparty

## Help Maintain Compliance

- Maintain a library of reusable clauses and leverage them in Microsoft Word 365-based templates and contracts
- Configure approval processes for clauses before they are activated for use in contracts
- Easily track changes made to individual clauses and maintain an audit trail within Salesforce

## Improve Collaboration with Redlining for Contract Negotiation

- Enable “in-browser” modification of contracts during review and negotiation
- Capture redlines made by internal users or external parties, and manage formal internal and external review processes

## Ensure Faster Contract Execution with Automated Workflow and E-signature Integrations

- Leverage prebuilt clauses and templates and automated approval workflows to expedite cross-team approvals
- Streamline customer sign offs with e-signature platform integrations for seamless transactions

## Monitor and Enforce Contractual Obligations

- Capture obligations and track them right from the contract records
- Assign individual stakeholders with specific obligation for fulfilment purposes
- Get timely updates on the obligation status mitigating risks and prompting course corrections toward fulfilment



# Salesforce Contracts Pricing

Review the pricing options available to you, including a useful add-on.

## Revenue Lifecycle Management

Accelerate growth with the entire revenue lifecycle on one platform.

**\$200 user/month**

USD (billed annually)

- Product Catalog Management
- Price Management
- Product Configurator
- Quote and Order Capture
- Asset Lifecycle Management
- Salesforce Contracts
- Business Rules Engine
- OmniStudio

Add-on SKU

## Salesforce Contracts

Contract lifecycle management solution.

**\*\$50 user/month**

USD (billed annually)

- Contract Authoring
- Contract Document Repository
- Contract Redlining
- Clause Library
- Online External Collaboration
- E-signature Integrations
- Obligation Management

\* This SKU requires prerequisite products. Please get in touch with a sales representative for detailed pricing information.

This page is provided for information purposes only and subject to change.  
Contact a sales representative for pricing information.detailed

# Leverage AI for Contracts

These features require the Einstein for Sales or Einstein for Service SKU.

## Smart Clause Generation Using AI

- Draft contract clauses with a prompt, generate clauses using Einstein AI, and update in the clause library after review

## AI-Powered Legacy Contract Digitization

- Derive key metadata such as names and dates, extract clauses from contracts documents, and create new digital contract records

# Gain Actionable Insights into Contracts

This feature requires an additional SKU.

## Get Insights on Contracts Operations

- **Salesforce Console**  
Purpose-built rich user interactive experience for Salesforce Contracts users
- **Dashboards on Salesforce Console**  
Homepage dashboard and “Need Attention” box for sales executives/sales ops/admins
- **Revenue Trends and KPIs**  
Sales teams can gain insights into contract revenue trends and key KPIs
- **Embedded Analytics**  
Pricing insights on Contract page, out-of-the-box embeddable components on Account, Quote, and Sales homepage

