Model N
Revvy Contract Lifecycle Management

Overview

Revvy Contract Lifecycle Management (CLM) enables organizations to create and manage all types of sell-side contracts in one place. This includes Service Contracts, Sales Contracts, NDAs, Statements of Work and many more. Built natively on the Salesforce1 platform, Revvy CLM enables users to create and manage contracts directly from within Salesforce or Microsoft Word®, and provides complete visibility and control of the entire contract lifecycle.

Managing contract templates, standard terms and clauses has never been easier. Create contracts easily or simply convert a quote into a contract using quotes from Revvy CPQ or Steelbrick CPQ. Create contracts from account or opportunity directly, include configurable products and initiate approvals, all from within the contract itself. Revvy CLM eliminates the arduous process of searching for clauses and terms manually. Revvy CLM includes a Template and Clause library making it easy to search and insert clauses.

A unique feature of this solution is that with Revvy CLM, legal teams can collaborate on contract documents using redlining in Microsoft Word® without the need to directly log into Salesforce®. Intelligent workflow process manage the data flow between the Contract record and Contract document and keeps them in sync while honoring validations and user access privileges. Revvy CLM provides secure, easy-to-use storage for contracts that increases user productivity, reduces business risk, and helps maximize revenue.

## Key Features

Track Products from Quote-to-Contract

Revvy CLM allows organizations to track various types of products and services that are sold as part of a quote and then incorporate those into the contract.

- Allows tracking of customer buying behavior to ensure compliance with agreed and contracted target levels

- Visibility of installed products allows contract amendments and renewals to proceed in full consideration of previously purchased and installed products

- Renewals to proceed in full consideration of previously purchased and installed products

Simple, Easy, Familiar

Revvy CLM documents reside in secure, centralized document repositories, enabling legal and sales users to manage and access contracts through many touch-points.

- Red lines (edits) in documents directly update the contract record in real time reducing manual effort to keep structured contract documents in sync

- Contract document revisions can be initiated from within Microsoft Word® enabling faster collaboration with customers
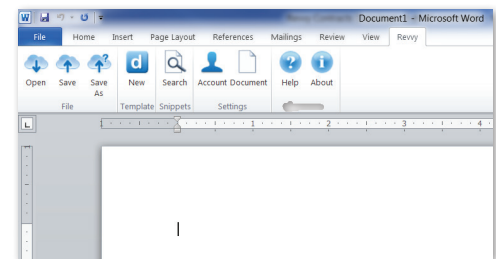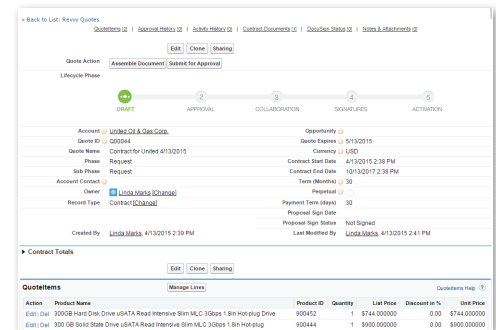
Simple Template, Clause Library and Contract Document Management

- Create Templates and Clauses in Microsoft Word; drag and drop Salesforce fields from within Microsoft Word

- Manage Templates and Clauses via Approvals management

- Mapping of Clauses to Template and Clause search across Contract documents enables a Legal team to manage Clause replacements effectively

- Import 3rd party paper to create Contracts with Customer's paper

- Create a single document package containing multiple independent documents that are attached to the Contract
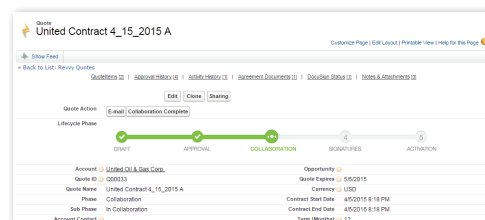
Manage Entire Lifecycle of Contracts

- Visual indicator for Lifecycle helps users track contracts through entire lifecycle

- Create various Contracts types: Service and Sales contracts, NDA, SOW, etc.

- Configure lifecycles for each Contract type independently

- Manage approvals via mobile device by simply replying to the notification email
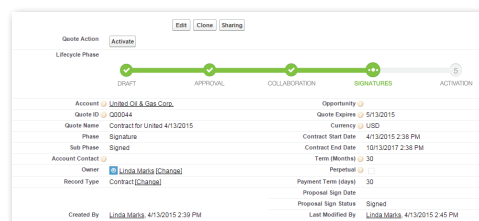
Additional Features

- Automate renewals of service products after contract term expiration or terminate early and trigger a prorated credit

- Facilitate contract amendment of structured contract data and contract documents

- Robust Amendment process

- Comprehensive Template and Clause library management

- Integration with digital signature applications provides seamless orchestration of Contract documents

- Search, manage and approve Contracts using mobile devices

- Leverage robust reports and dashboard native in Salesforce