



Model N Contract Lifecycle Management

Overview

Model N 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, Model N 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 either Model N CPQ or Salesforce CPQ. Create contracts from account or opportunity directly, include configurable products and initiate approvals, all from within the contract itself. Model N CLM eliminates the arduous process of searching for clauses and terms manually. Model N CLM includes a Template and Clause library making it easy to search and insert clauses.

A unique feature of this solution is that with Model N 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. Model N 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

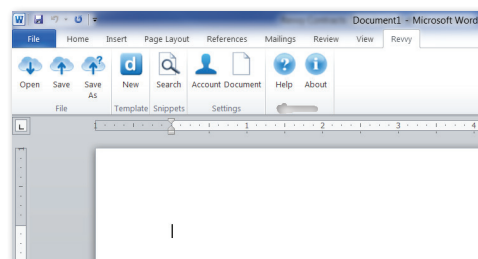
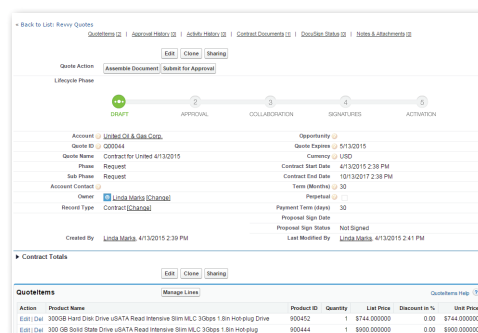
Model N CLM allows organizations to track various types of products and services that are sold as part of a quote and then incorporate those into the contract.

- 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

Model N 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





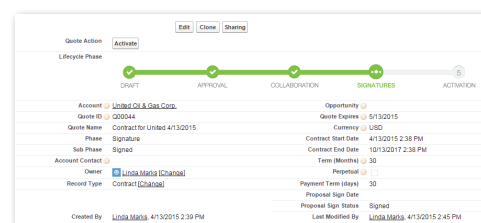
Simple Template, Clause Library and Contract Document Management

- 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

Contract Documents					Contract Documents Help ?
Action	Agreement Document Name	Amendment #	Status	Last Modified By	Last Modified Date
Edit Del	Contract for United 4/13/2015		Superseded	Linda Marks, 4/13/2015 2:46 PM	4/13/2015
Edit Del	Contract for United 4/13/2015 - Amendment 1	1	In Amendment	Linda Marks, 4/13/2015 2:46 PM	4/13/2015
Edit Del	Contract for United 4/13/2015 - Amendment 2	2	Draft	Linda Marks, 4/13/2015 2:46 PM	4/13/2015

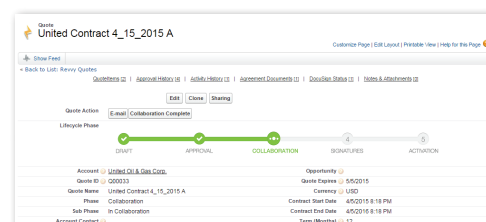
Manage Entire Lifecycle of Contracts

- 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



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Model N CLM Data Sheet