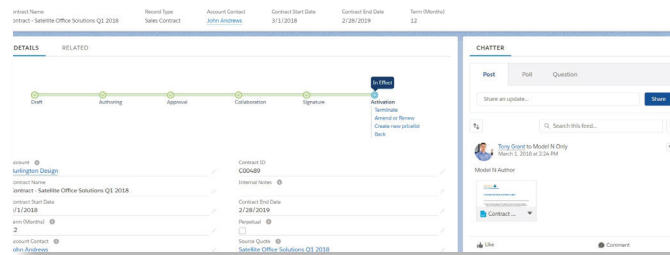


# Model N Contract Lifecycle Management

## CLM for the Enterprise

Model N Contract Lifecycle Management (CLM) enables organizations to create and manage all types of sell-side contracts including: Service Contracts, Sales Contracts, NDAs, Statements of Work and many more. Built natively on Salesforce, Model N CLM enables users to work directly from within Salesforce or Microsoft Word®, and provides complete visibility and control of the entire contract lifecycle.

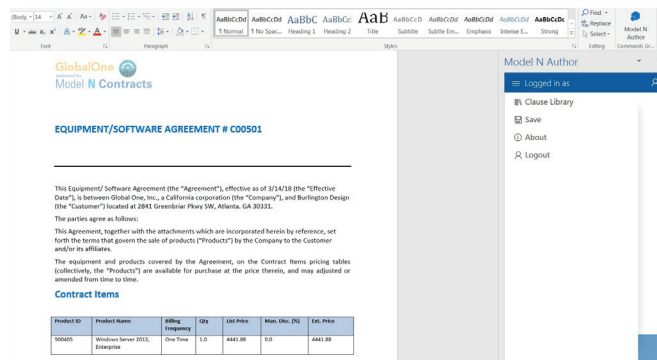
A library of standard templates simplifies contract creation. Contracts can be created with Model N CLM, directly from Salesforce accounts and opportunities, or created from quotes generated by either Model N CPQ or Salesforce CPQ. With Model N CLM, configurable products and pricing can be easily added, while using the search and insert feature from the built-in clause library facilitates customer contract requests. Intelligent Approvals quickly route the contract for review based on an analysis of contract type, products and terms, while providing on-going visibility into the status of the approval process.



With Model N CLM, sales, customers and legal teams can collaborate on contract documents using redlining in Microsoft Word® without the need to directly log into Salesforce®. Intelligent workflow automates the data flow between the Contract record and Contract document and keeps them in sync. Model N CLM provides secure, easy-to-use storage for contracts that increases user productivity and reduces business risk.

Model N CLM is an enterprise-grade contract solution and teamed with Model N CPQ provides the foundation for a complete enterprise-grade quote-to-cash solution.

- End-to-end: Enables the full contracting lifecycle from creation through amendments and renewals and tracks compliance and contract performance.
- Interoperable: Built-in ability to synchronize with ERP master data and seamlessly incorporates Microsoft® Word and Excel
- Performance and scalability: Advanced architecture incorporates performance engines and caching technology that scales to thousands of users



## Benefits

- Simplify contract creation
- Shorten contract review and approval time
- Reduce sales time spent on contracts
- Facilitate collaboration using standards like MS Word
- Easy search of central contract repository
- Reduce errors and risk
- Simplify amendments
- Improve renewal rates
- Maximize lifetime value of agreements
- Gain insights into contracting KPIs
- Reduce effort and cost of audits
- Simplify administration and lower IT costs

**Simple, easy, familiar**

Model N CLM leverages Microsoft Word and Salesforce to make it fast and easy

- Documents reside in a secure, centralized, searchable repository
- Contract revision can be done directly in Word enabling faster easier collaboration
- Redlines in Word directly update the contract records and version control is automated

**Enable easy standardization and flexibility**

Use MS Word and drag and drop Salesforce fields to build template and clause libraries

- Library creation leverages approval workflows to ensure review and governance
- Import 3rd party paper to create contracts based on customer documents
- Create a single document package containing multiple independent documents

**Streamline the end-to-end contract lifecycle**

Visual contract lifecycle helps users manage the entire contract process

- Create specific lifecycles for each contract type used in Model N CLM
- Automate renewals of service agreements and prorated credits for termination
- Easily find and amendment structured contract data and documents
- Search, approve and manage contracts using mobile devices
- Integration with digital signature

**Track products and services from quote through contract lifecycle**

Simplify conversion of quotes into contracts and keep track of contract performance

- Accelerate renewals and amendments with visibility to services and installed products
- Ensure visibility to contract compliance and performance to maximize revenues

**Bring intelligence to the contract process**

Dashboards provide quick visibility into contract activity  
KPIs, pending renewals

- Comprehensive Data mart enables rich reporting capabilities
- Analysis of contracts for risk and non-standard clauses

**Key Features**

- Easy, cloud solution
- Standard template and clause library
- 1 click quote to contract
- Visual workflow with next best action recommendations
- Automated version control and audit trail
- Interoperable with Microsoft Word and Salesforce
- Searchable clause library with drag and drop insert
- Import 3rd party paper
- Intelligent approvals with conditional routing
- Create, approve and manage contracts on mobile devices
- Dashboards for contract analysis, tasks and KPIs
- Authoring, edits and redlines in MS Word
- Secure, searchable central contract repository
- Contract alerts and notification
- Salesforce Lightning UI-enabled

The screenshot displays two sections of the Model N CLM interface. The top section, 'Notes & Attachments (4)', shows a list of documents including 'MSA for APIC 2018.docx' and 'Certificate 07cc035-fa03-401b-908f-8987943c0390.pdf'. The bottom section, 'Track Changes in Document (6+)', is a table with columns for 'IS LATEST', 'CLAUSE NAME', 'RSK', and 'CLAUSE TEXT'. It lists several clause entries with their respective risk levels and text snippets.

IS LATEST	CLAUSE NAME	RSK	CLAUSE TEXT
<input checked="" type="checkbox"/>	ISO_License Material Violation	Low	If License materially violates any te...
<input checked="" type="checkbox"/>	ISO_License Payment Default	Low	If License defaults in the payment ...
<input type="checkbox"/>	ISO_License Payment Default	Low	If License defaults in the payment ...
<input type="checkbox"/>	ISO_License Material Violation	Low	If License materially violates any te...
<input type="checkbox"/>	ISO_License Material Violation	Low	If License materially violates any te...
<input type="checkbox"/>	ISO_License Payment Default	Low	If License defaults in the payment ...

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