

Exari's Robust Salesforce.com Integration

Turn opportunities into contracts

Sales teams have one task at hand: to generate revenue quickly for the company. Delays in responding to opportunities can result in missed renewals or lost deals. Keeping sales professionals equipped with the right technology and the correct, up to date information is the key to success.

With numerous enterprise platforms to choose from that fit the needs of different departments, it's important that your investments are integrated and synced with one another. The best solution for many companies is to keep the salespeople where they want to be (Salesforce) and the lawyers where they want to be (a dedicated, lawyer-centric CLM system). With Exari, Sales can work in Salesforce while Legal can keep using Word (or whatever program they're comfortable with) to draft and negotiate contracts.

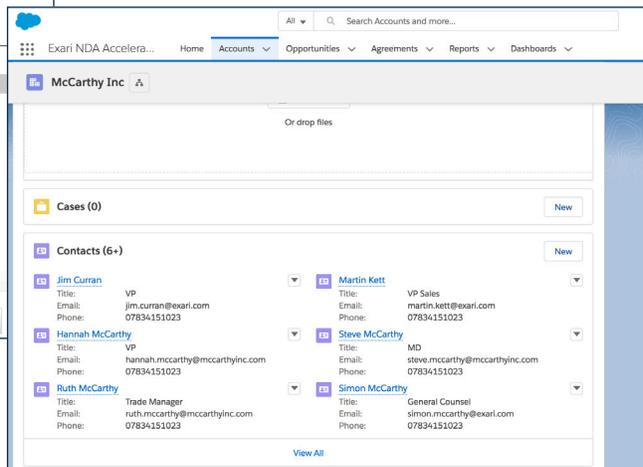
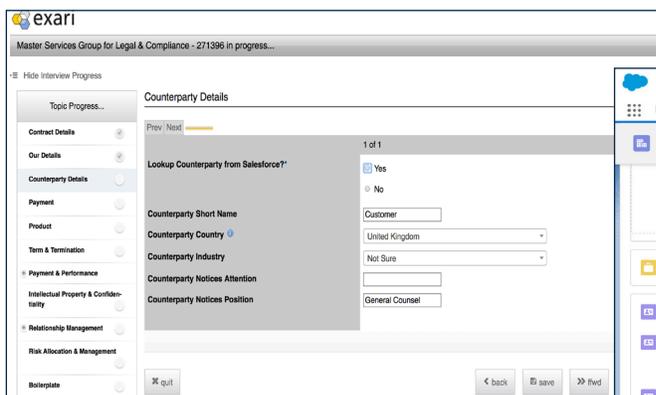
With Exari's powerful open Interface and connectivity options, allows documents to be stored in the cloud or on-premise and integrates fully with Salesforce, without requiring users to login again, improving security and saving time. A solution with advanced contract lifecycle management capabilities, to enable Users to work where they feel best, is the only option for companies with ever-growing and highly complex contract portfolios, and ours is second to none.

Close deals faster with self-service contracting

If you're a Salesforce.com customer and you're looking for a way to close deals faster, Exari has good news. By combining Exari's best-of-breed contract drafting wizard with Salesforce CRM you can empower your sales team to create compliant contracts on demand. Eliminate the cost and delay of sending every deal through Legal. Eliminate the risk and frustration of non-legal professionals creating a contract. With Exari's template and rules driven contract creation solution, sales teams can simply answer questions during a guided interview and a legally-approved contract is assembled in real time.

Streamline operations with fully integrated systems

Any Account, Opportunity or Contract data item already captured in Salesforce can be seamlessly passed into Exari, so that proposals and contracts are automatically populated with the right details. If any contract details are missing, Exari will make sure those details are captured and validated, and will then attach the finished document – as Word or PDF, depending on your rules – to your Contract record together with any newly captured data.



Reduce risk with workflow rules

Using key terms in the contract record as the trigger, workflow rules can be used to improve compliance and reduce risk for managing contract approvals. High value or high-risk agreements can trigger a multi-step approval workflow via legal and senior management. At Contract execution a series of notifications and reminders can be sent, so that everyone who needs to know, has the latest negotiated version. Reminders and tasks can be sent out so a renewal is never missed. Exari comes with approval workflow templates out-of-the-box and allows for custom workflow design.

Accounts > McCarthy Inc				
Agreements				
19 items · Sorted by Agreement Number · Updated a few seconds ago				
AGREEMENT NUMBER ↑	DESCRIPTION	STATUS	LAST MODIFIED DATE	
1	00000537	Mutual NDA with McCarthy Incorporated	Working Draft	9/24/2018 4:55 AM
2	00000538	Mutual NDA with McCarthy Inc	Final Approved	4/24/2018 2:15 PM
3	00000541	Mutual NDA with McCarthy Inc	Working Draft	4/18/2018 5:19 AM
4	00000549	Mutual NDA with McCarthy Inc	Working Draft	4/24/2018 5:41 PM

Accelerate revenue with eSignature

Exari's integration with DocuSign's robust eSignature Platform empowers users to streamline contract approval processes and signature. Eliminate the cost and delay of traditional contract execution processes and turnaround agreements in a fraction of the time it takes traditional, to improve your company's contract booking speed. Keep an audit trail by tracking every step of the process and provide proof of the signing with a certification of completion. This offers the convenience of signing at anytime, anywhere, on any device.

Full visibility into key contract data

For many senior management teams, getting your hands on an accurate list of active contracts can be challenging. Even if those contracts are kept in a central repository, the visibility into their terms is limited. Exari solves this problem by making it easy to capture much more granular data, when each contract is created and by enabling that data to be viewable in the Salesforce.com contract record. Your executive team can now run a wide range of reports to gain much deeper insight into performance and risk across your contract portfolio.

ABOUT EXARI

Exari delivers the most complete Enterprise Contract Lifecycle Management platform, used every day by market-leading companies to understand all aspects of their contract ecosystem worldwide. With Exari, customers can reduce contract risk and improve operating efficiency with 100% Contract Certainty™.

