

# Organize and Automate Your Contracts Easily with DocuSign CLM Essentials

## Start using in weeks, not months—and realize ROI fast

Growing companies need to hit aggressive business goals with limited resources. Leaning on small legal and operational teams to manually generate, negotiate, execute and properly manage contracts slows down business, increases risk and frustrates customers and employees. At the same time, many companies do not have the resources and time to implement a technology solution that will take months to set up.

### Easy to use & administer

Get started with low total cost of ownership

### Start small, scale as you grow

Seamlessly upgrade to more capabilities when you need them

### AppExchange leader for contracts

Accelerate quote to cash with our best-in-class Salesforce integration

### Trusted partner

Built-in best practices, from the leader in contract management

## DocuSign CLM Essentials

Contract Lifecycle Management (CLM) automates the end-to-end contracting process, including contract generation, review, negotiation and workflows. It also centralizes agreement storage. DocuSign CLM Essentials makes this functionality accessible at an affordable price point. It helps growing businesses get organized, execute more efficiently, automate the busywork and collaborate across teams. Because you can start using Essentials in weeks, you'll see rapid results in business efficiency and risk reduction.

## Document generation

### Contract templates

Centralize contract templates in CLM Essentials to ensure the latest legal approved language is always used. Create and edit templates easily with a drag-and-drop editor.

### Automated generation

Insert data from an input form or Salesforce to populate each template with custom details for a professional contract. The contract is generated in seconds, with no hassles.

Assigned to me		Due today	Due in 7 days	All	
		2	3	5	
Task due	Due date	Name	Party	Type	Value
Approve	Tomorrow	Built to Last_MSA_Amendment_03	Built to Last	Amendment	
Attach documents	08/30/2022	NEA_TechSphere_2021	TechSphere	NEA	
Resolve comment	08/30/2022	SBE054_SOW_Red Door	Red Door	SOW	\$50,000
Send for negotiation	09/01/2022	SOW_ElectricAVE	Electric Avenue	SOW	\$43,000
Send for signature	09/10/2022	SBE053_SOW_Red Door	Red Door	SOW	\$2,000

Organize, automate and collaborate on contracts in a simple, easy to use platform

## Collaboration

### Version comparison

Send contracts to internal and external parties for review and approval with the ability to compare changes quickly and keep a full audit trail.

### Comments and tasks

Use comments and tasks to collaborate with internal stakeholders more easily in one place and accelerate time to approval.

### Slack integration

Collaborate in real time with contacts and stay informed about tasks and pending actions in Slack.

## Workflows

### Workflow templates

Quickly create automated contract workflows starting with prebuilt templates or from scratch.

### Workflow steps

Easily add and configure steps (generate, route, approve, etc.) using a drag-and-drop editor to build the right standardized process for your contracts.

### Workflow actions

Automatically trigger actions that notify users when they are required to participate in a workflow for faster execution.

## Management

### Central storage

Store and access contracts in a central location to establish a single source of truth for your legal department and other users.

### Smart search

Use full text and keyword search to find contracts that you need quickly. Filter and sort by status, party, contract type, value and other tags for new insights.

### Industry leading security and uptime

DocuSign CLM Essentials is built on the core DocuSign CLM framework, which is SOC 1 & SOC 2 certified with industry-leading uptime so it's secure and available when you need it.

## Admin & Integration

### Simplified admin

Manage users, settings and more from an interface that keeps administration simple with limited need for IT or development support.

### Salesforce Integration

Use the industry-leading CLM Salesforce integration to create, review, route, sign and store contracts inside Salesforce so Sales can stay in a tool where they work while Legal and Ops can manage the sales contract process where they prefer.

### Native eSignature Integration

Get the native experience and functionality of the most robust e-signature solution on the market.

## Services

### Deploy quickly

Start using in weeks not months with hands-on help from agreement experts.

### Become an expert

Train and enable your team with specialized, self-paced learning courses from DocuSign University.

### Scale your solution

Expand your CLM solution over time with support from the world's largest ecosystem of agreement experts.

## Sample Use Cases

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### Sales

- Master Service Agreements
- Order forms
- Sales contracts
- Distribution agreements
- Special deal terms

### Legal

- NDA's
- Regulatory or government filings
- Contract compliance audits
- Partner agreements

### Operations & IT

- Work orders
- Change orders & requests
- Asset tracking
- Incident reporting

### Finance

- Client onboarding
- Account opening
- Asset transfer
- Claims settlement

### Many more

- Franchise agreements
- Statements of work
- Commercial sale & lease agreements
- Subcontractor agreements
- Major gift agreements
- Tech transfer agreements

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### About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 750,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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