DocuSign®

Take Control of Your Salesforce Contracts

Contracts in Salesforce are typically stored as part of the customer record — convenient for the account team but highly challenging for those needing to search for, review, manage and act on the organization's portfolio of agreements. The need to carefully navigate into specific accounts or opportunities to find individual sales contract files is tedious, risk-laden and ultimately costly to the organization.

Streamline access to all your agreements across Salesforce

DocuSign Insight Connector for Salesforce makes all your Salesforce contracts easy to find, filter and analyze. Connecting Salesforce with Insight provides direct access to all your contracts along with associated files and key metadata fields. Insight provides powerful AI analysis of agreements to help you uncover organizational risks, obligations and opportunities.

– Access all Salesforce contracts directly in Insight with visualized dashboards to spot trends, risks and opportunities

– Search and filter your agreements by legal concept, full text and metadata—instead of just keywords

– Find answers faster with AI-powered analysis

– Compare AI-extracted clauses, terms and answers side-by-side across agreements

– View contracts, associated files and metadata without accessing Salesforce

Understand what's in your agreements

Insight provides powerful AI analysis of agreements to help you uncover organizational risk, obligations and opportunities.

– Dramatically accelerate contract reviews

– Bring non-standard and rogue agreements back under control

– Reduce the risk of non-compliance and negative business outcomes

– Gain actionable insights to drive business value

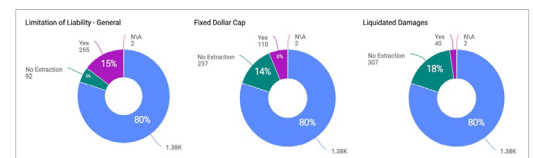– Improve efficiency and response times

83%
faster review of agreements with the assistance of AI (Fortune 500 telecom and networking company)

6%
more accurate review of agreements with the assistance of AI (Fortune 500 telecom and networking company)

95%
automated review decisions with AI — 2.6M out of 2.8M (Fortune 50 global bank)

Insight's AI identifies and displays critical sales topics like specific obligations, common points of risk and key business terms.

"Insight's easy access to Salesforce contract files is a game changer for sales ops and legal teams. The contracts for an entire quarter can be analyzed for risk and business trends in a fraction of the time."

Chris Harris
Vice President, Revenue Operations
DocuSign

Extract more data value with Insight

Insight combines the text of a contract with the metadata from Salesforce to form an analysis profile, enriched with information derived by Insight's AI capabilities.

– Select from our vast library of pre-built AI models or customize models to meet organization-specific needs

– Answer even highly specific questions automatically, such as:

  · Does the Termination for Convenience clause include an ongoing obligation to repay?

  · Does the Limitation of Liability clause specify a fixed dollar cap?

  · Does the agreement require notice to the customer in the event of a data breach?"

On-board and clean legacy contract data

Insight contract on-boarding capabilities help ensure that legacy data is searchable and optimized for analysis. Data hygiene options include:

– OCR

– Deduplication

– Classification

– Data extraction

– Data enrichment

– Normalization of extracted data

New York	→	**New York**
NY	→	**New York**
N.Y.	→	**New York**

Example: Normalize extracted data points for more consistent searching and filtering

Sample AI Topics for Sales

Applicable laws and regulations	Indemnification
Audit and inspection rights	Insurance
Compensation and payment	Intellectual property
Compliance with laws	Limitation of liability
Compliance with policies	Personnel
Confidentiality	Pricing
Continuity of business	Records
Currencies	Reporting
Data breaches	Renewal
Governing law/ jurisdiction/dispute resolution	Subcontracting
	Term
	Termination
	Warranties