

Case Study

Building an AppExchange App for Contract Management in Salesforce



The Customer

The customer provides a contract management app that improves document reconciliation, maintains secure access to contracts, and ensures transparency when negotiating contracts.

Users can create, review, and log amendments with comments; negotiate contracts in real time; and automatically forward documents for approval and e-signing.

The product can also help legal teams reduce the cost of drafting contracts.

The need

Since contracts are an essential part of any organization's business process, Salesforce provides the opportunity to create and store contracts and attach them to contacts. The customer saw an opportunity to improve the way contracts are managed in Salesforce by adding functionality for drafting and negotiating contracts. To achieve this, the product needed to be integrated with Salesforce.



Extending Salesforce CPQ with Functionality for Drafting and Negotiating Contracts

Brimit integrated the external contract management app with Salesforce CPQ, making it possible to perform the following tasks right in Salesforce:

- Upload contracts from the external contract management app or create them by following tooltips
- Track contract status
- Send contract drafts for review, editing, and signing
- Embed quotes and negotiate amendments
- Get automated alerts regarding review, negotiation, and signature activities

The Result

The application works seamlessly in standard and customized Salesforce UIs and adds visibility and velocity to the work of legal teams, thus allowing organizations to close deals faster.

Our specialists also prepared a managed package for the app and published it on AppExchange.



Brimit is a team of Salesforce experts.

Discuss your project.

<https://www.brimit.com/technologies/salesforce>

