

Contract intelligence for Salesforce

Accelerate deals and turn sales contracts into searchable data with integrated contract management that sales teams will actually use

No more deal bottlenecks, unapproved terms, or missed obligations

Evisort's Contract Intelligence for Salesforce combines innovative contract management with the world's leading CRM so businesses can streamline sell-side contract generation and review — boosting productivity by keeping salespeople in Salesforce, minimizing deal errors by auto-populating contract intake forms with Salesforce data, and turning both new and historical contracts stored in Salesforce into searchable data and actionable intelligence without manual data entry.



Initiate contracts from Salesforce for faster deal cycle

Sales representatives select from predefined contract templates, complete intake forms, and automatically initiate review processes with legal and operations teams — all from within Salesforce.



Auto-populate data from Salesforce to accelerate contract requests

Sales teams can auto-populate contract intake forms with data directly from Salesforce, eliminating the need for redundant, error-prone manual data entry.



Scale and standardize workflow processes with Evisort

Legal, operations, compliance, risk, and information security teams use Evisort's intelligent Contract Lifecycle Management to standardize contract templates and workflows, automate contract requests from Salesforce, and streamline contract review, redlining, approval, and execution.



Track deal status and activity for more transparency

Sales leaders can monitor contract review status, see who's working on the contract, and update a request directly in Salesforce, increasing accountability and deal velocity. Evisort also makes it easy to offer help, issue reminders, and send nudges to speed the process along.



Sync with Evisort and turn contracts stored in Salesforce into searchable data

Evisort quickly and accurately extracts fields and clauses from contracts stored in Salesforce without manual data entry. Salespeople can quickly find key terms without having to read the full contract or leave Salesforce, while legal and operations teams can track terms and obligations within Evisort.



Tailor Evisort to your Salesforce

Salesforce administrators can configure which Evisort contract templates, workflows, clauses, metadata, and field data to map, sync, and display within specific Salesforce objects.

Together, Evisort and Salesforce transform contracting into deal acceleration



Accelerate revenue and reduce customer churn

Close deals faster and recognize revenue sooner by reducing the time your revenue operations and deal desk spend preparing and reviewing customer contracts. Keep customers happy by tracking and honoring obligations such as required notices. Give your team more time to prepare for upcoming customer contract renewals and expiration dates.



Sales contracting operations

Use Evisort's intelligent Contract Lifecycle Management to streamline contract reviews. Reduce the time, cost, and errors associated with fragmented contract requests and manual review. Salespeople can initiate and manage the contract lifecycle for a range of contract types including NDAs, MSAs, SOWs, amendments, and more without ever leaving Salesforce.



Get easy access to deal data

Run Evisort's market-leading Contract Analytics on sell-side contracts to extract and track key terms, expiration dates, and deal info without manual data entry.



Enforce compliance

Implement contract templates with approved, standard language. Automate workflow processes to ensure that terms and redlines are approved by the relevant compliance, risk, information security, and executive stakeholders.

