

# SEAL FOR SALESFORCE®

Uncover Revenue and Risks within your Contracts

## 01 - THE CHALLENGE

Incomplete or inaccurate contractual information in Salesforce®, including terms, conditions, clauses, and obligations, directly impacts your ability to maximize the value of your customer relationships.

Can you answer the following questions?

- How many of your Salesforce® attachments are contracts?
- Can you easily find all your key contracts and commitments?
- Do your customer contracts in Salesforce® conform to corporate policy?
- Are all key reporting metrics correct?

When engaging with customers, it's imperative to have immediate insight into key contractual information such as commitments, pricing, expiration dates, service level agreements, and what products and services are included. When this information is not available, contractual obligations are not met which can lead to incorrect pricing, missed revenue, and increases in legal, operational, and regulatory risk.

### Seal Customer Example

- 700,000 contracts identified and uploaded to Salesforce®
- Contract metadata merged and enhanced with data from other systems prior to upload to Salesforce
- Created a fully searchable index of all contracts
- Peak processing was 36,000 contracts per day
- Inactive and duplicate contracts were removed
- Contract review team was able to process reviews five times faster with Seal
- Entire discovery, processing, and migration completed in under 10 weeks

## 02 - THE SOLUTION

Seal Contract Discovery and Analytics Module for Salesforce® finds all electronically stored contracts across the enterprise and brings them into a centralized repository. The pre-built integration means Seal can feed customer contracts into Salesforce® to be presented, in context, within the customer record, providing key contract data as discrete fields within a searchable contract document.

To load contract data into Salesforce®, Seal provides an intuitive interface to map contract metadata extracted by Seal to the relevant fields, record types, and objects in Salesforce®.

Contracts originally stored as image files are converted to searchable PDF files and are fully text searchable from within Salesforce®. This means text, clauses, and clause

combinations not contained in the extracted metadata and loaded into Salesforce® can still be searched at any time.

### 03 – SEAL CONTRACT DISCOVERY AND ANALYTICS FOR SALESFORCE®

Contracts originally stored as image files are converted to searchable PDF files and are fully text searchable from within Salesforce®. This way text, clause, and clause combinations not contained in the extracted metadata and loaded into Salesforce® can still be searched at any time.

The Seal Discovery and Analytics Module for Salesforce® can also connect, extract, and analyze attachments, files, and Chatter items held within Salesforce®. This allows Seal to analyze this data and update the source object with the searchable rendition of the contract and associated contract information.

To assist with the onboarding of new customers to Salesforce®, accounts can be automatically created within Salesforce® using information extracted as part of the Contract Discovery process. Seal Contract Discovery and Analytics provides a scheduling process that allows for uploads to occur on a regular basis (hourly, daily, weekly, monthly, etc.).

### 04 – BENEFITS OF SEAL

With Seal, users of Salesforce® will:

- Obtain a complete and comprehensive view into customer relationships
- Reduce the time salespeople spend chasing customer data so they can do more selling
- Assist salespeople with new opportunities, including upsell, cross sell and renegotiation of terms
- Uncover the possible use of non-standard language within sales contracts
- Better understand renewal dates, auto-renewals and contract terms
- Assess risk for many types of contractual provisions, including data breach obligations, IP protection, termination for convenience, and other indemnifications
- Understand the ordering and pricing incentives they've offered customers over time, including most-favored-nation (MFN) pricing, auto-renewals, indexed pricing, etc.
- Ensure they are complying with changing IFRS, GAAP and Dodd-Frank rules for revenue recognition

To learn more, visit [www.seal-software.com](http://www.seal-software.com)

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