Organise and Automate Your Contracts Easily with DocuSign CLM Essentials

Start using in weeks, not months—and realise 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

AppExchange leader for contracts
Accelerate quote to cash with our best-in-class Salesforce integration

Start small, scale as you grow
Seamlessly upgrade to more capabilities when you need them

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 centralises agreement storage. DocuSign CLM Essentials makes this functionality accessible at an affordable price point. It helps growing businesses get organised, 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
Centralise 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.

Organise, 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.

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 standardised 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 specialised, 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

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

Legal
NDAs
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