

Contract Lifecycle Management Integration with Supply Chain Management

Presenters:

Shriram Sivasankaran - Senior Product Manager

Rishabh Agarwal – Senior Engineering Manager

Mathieu Binaisse - Senior FastTrack Solution Architect

Amar Kumar - Senior FastTrack Solution Architect

Vivek Budhatrao - Senior Product Manager, Icertis



Agenda

- CLM Overview
- Business Process
- Integration with Icertis
- Integration overview
- Integration with a 1st party on NDA flow
- Resources
- Q&A

Shriram Sivasankaran

Senior Product Manager
Dynamics 365 SCM

LinkedIn:

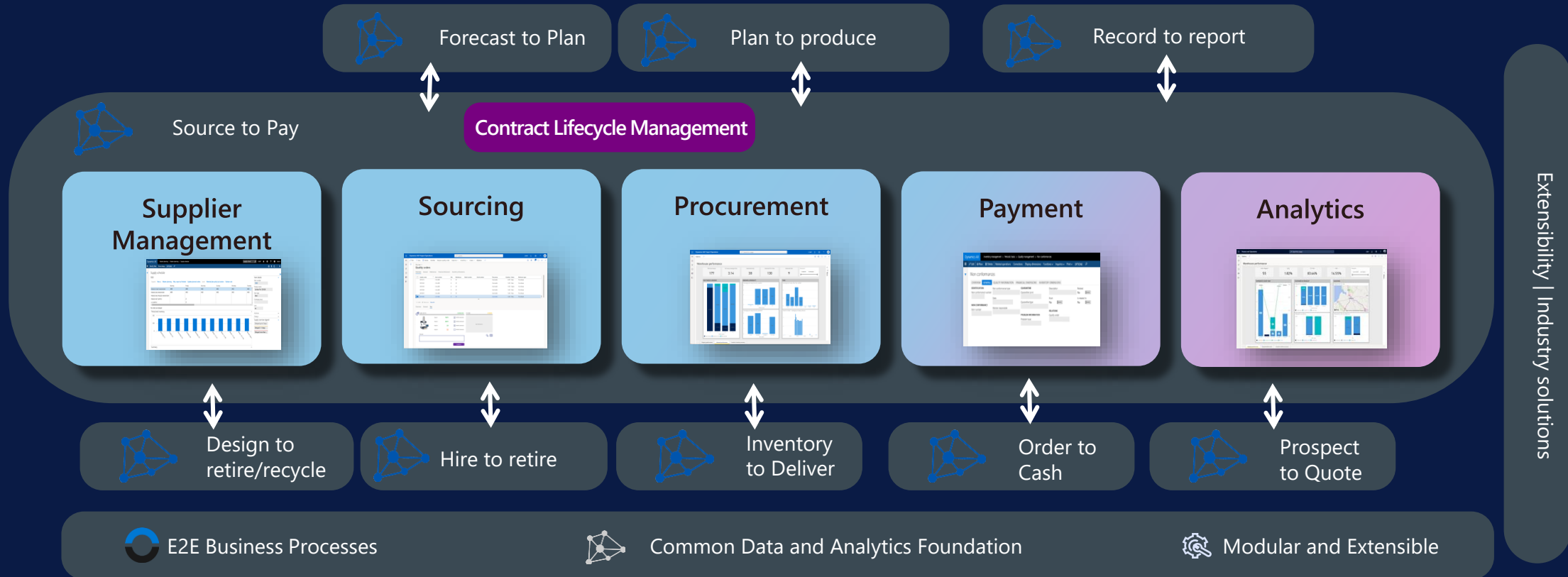
<https://www.linkedin.com/in/shriram-sivasankaran/>



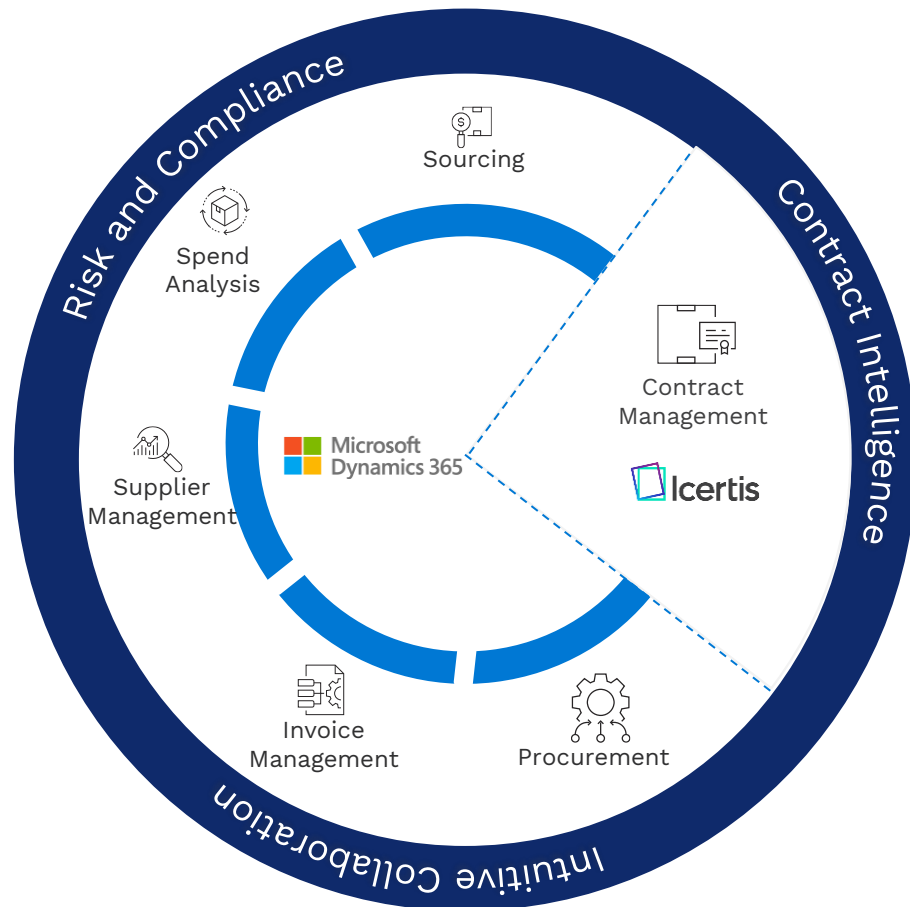
Overview



Source to Pay in the ERP



Strategic Partnership



Gain more visibility across their S2P process areas

Drive Compliance and Risk mitigation

Strengthen Vendor relationships

Advanced Insights to support informed decision-making

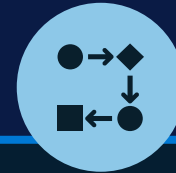
Effectively and sustainably meet vendor and customer demands

Scope



Non-Disclosure Agreements

An NDA contract represents a supplier contract from an external CLM system that doesn't directly affect any processes in Supply Chain Management



Purchase Agreements

Purchase agreement contracts are deeply integrated with the purchase agreement source document and process in Supply Chain Management

Create | Author | Redline | Negotiate | Sign | Amend | Terminate

Contract Flows

Amar Kumar

Senior FastTrack Solution Architect

Email:

kuamar@microsoft.com

LinkedIn:

<https://www.linkedin.com/in/amark352/>

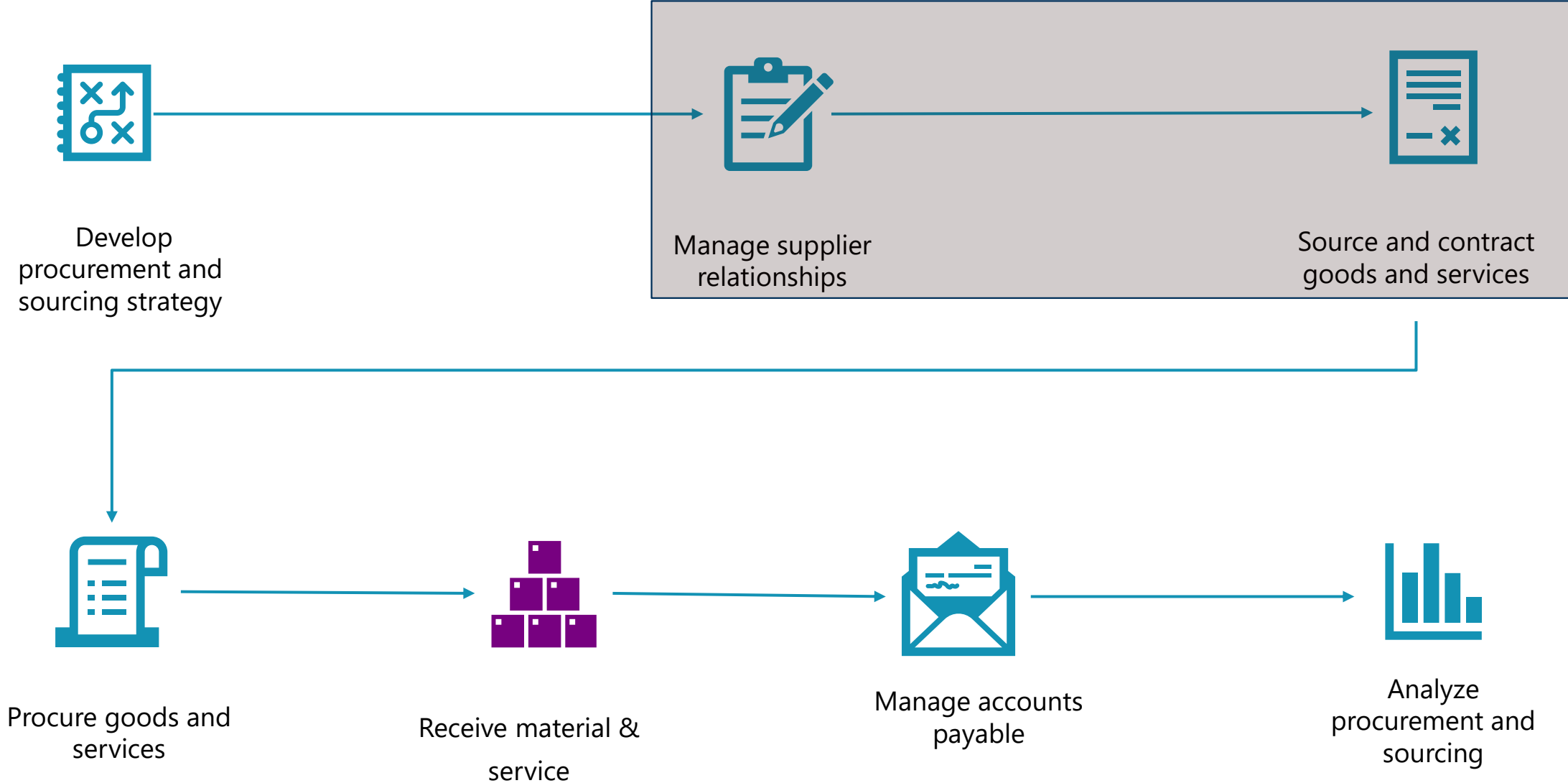


Business Process

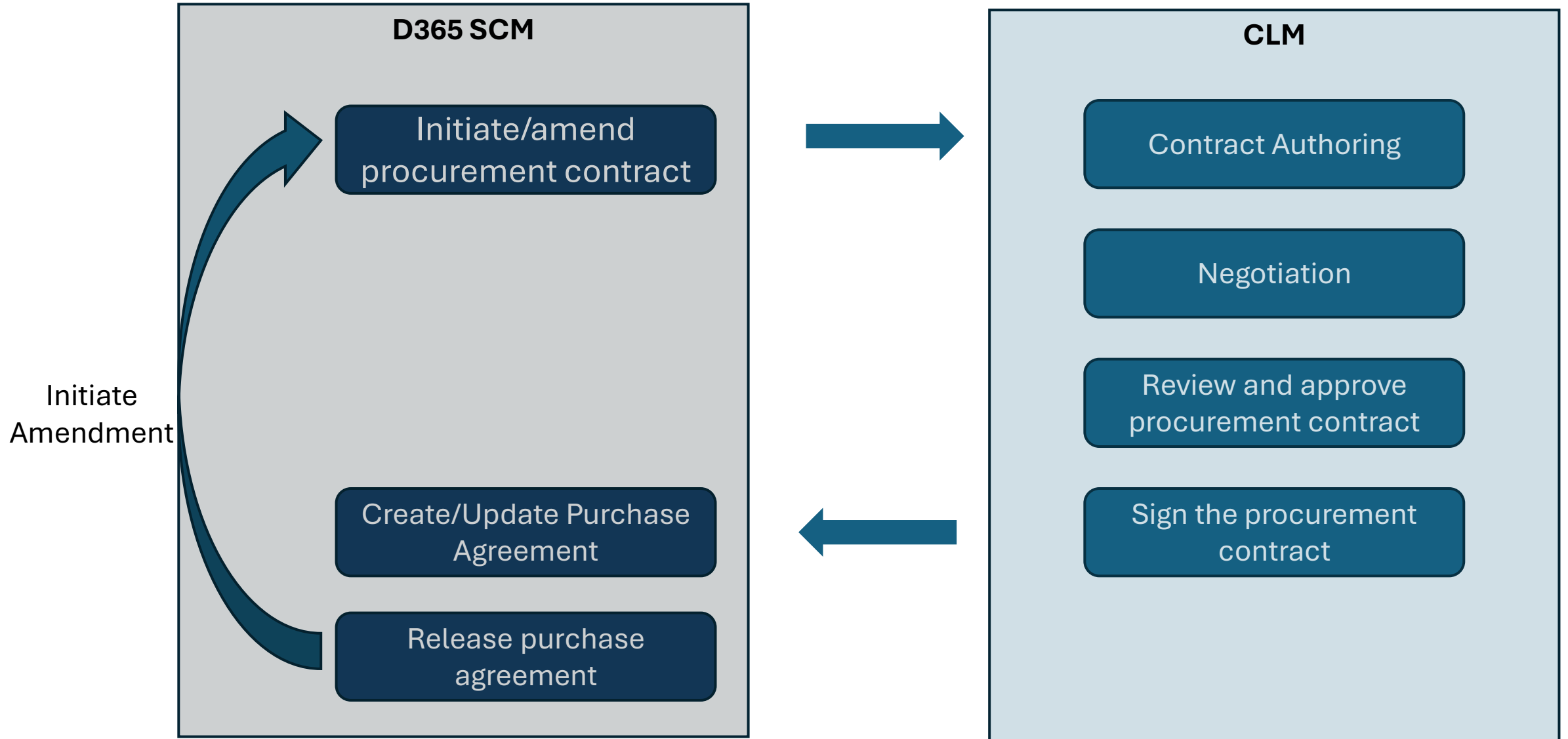
Source to Pay



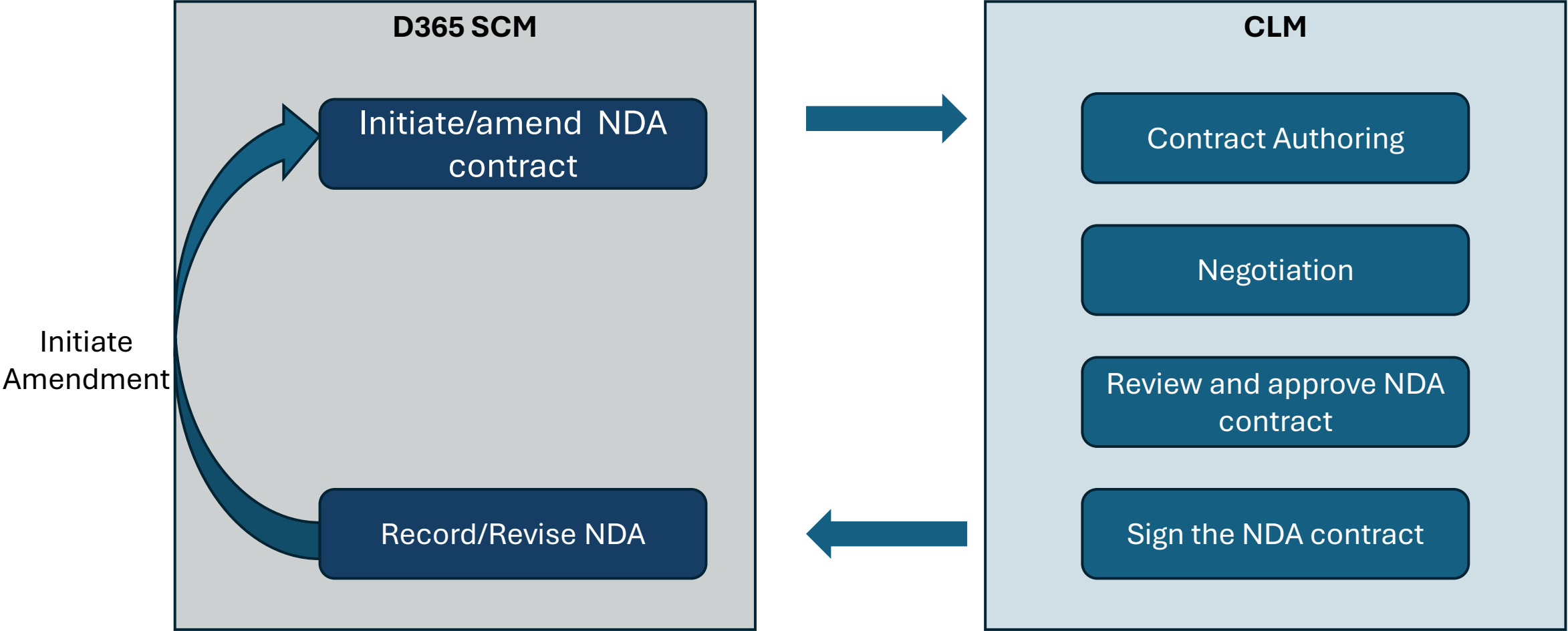
Source to Pay Business Process Areas



Purchase agreement flow



NDA flow



Vivek Budhatrao

iCertis – Senior Product Manager

Email:

vivek.budhatrao@icertis.com

LinkedIn:

<https://www.linkedin.com/in/vivekbudhatrao/>



Integration with Icertis



Why Icertis: The Icertis Contract Intelligence Platform

Automate workflows, uncover insights, and optimize business processes to capture value.

Industry and Partner Solutions



GOVERNMENT CONTRACTING



HEALTHCARE & LIFE SCIENCES



ENERGY TRADING



RETAIL & CONSUMER



INDUSTRIAL



FINANCIAL SERVICES



TECH, MEDIA TELECOM

Contract Productivity Applications

Contract Performance & Realization

Contract Operations & Lifecycle Management

Contract & AI Infrastructure

System Infrastructure

Copilot



Insights

Negotiation Guidance

Risk Assessment

Collaboration

Obligation Management

Commercial Reconciliation

Request > Create/Draft > Redline/Review > Approve/Execute > Manage

Contract Performance

Platform Tools

Application Lifecycle Management

Icertis Developer Network (IDN) | UX Studio

CONTRACT REPOSITORY, CONTRACT RULES ENGINE, AI SERVICES

SECURITY, SCALABILITY, AVAILABILITY, REDUNDANCY

CLOUD



ENTERPRISE SYSTEMS



LANGUAGE MODELS

OpenAI | Llama-3 | Gemini

Harvey | Cust LLMs

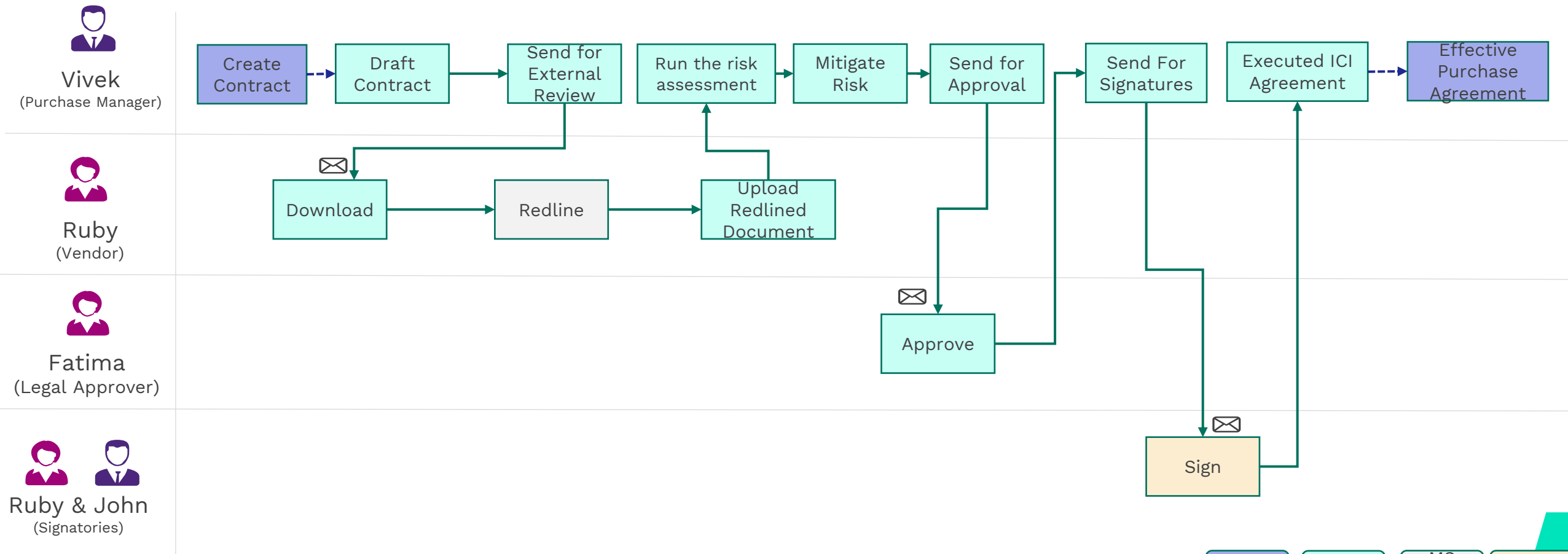
Integrations

Demo: Purchase Agreement for High-end Speaker Procurement

Contoso Entertainment System USA (USMF) is planning to set up a new office, the 'Innovation Hub,' and needs to procure a state-of-the-art sound system.

Vivek, the Purchase Manager is responsible for procuring 50 High End Speaker over the period of 1 year.

Vivek works with **Ruby** the sales manager of “**Fabrikam Electronics**” the vendor to fulfill this business need.





Contoso Entertainment System USA

Search people ...


< December 2024 >

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29	30	31				


Work items assigned to me

Work items will be displayed here after they are assigned to you.


APPS




Business performance analytics (preview)




Business performance planning




Copilot for Finance (Preview)




Demand planning



Human Resources




Inventory Visibility




Invoice capture


WORKSPACES




Bank management




Cost accounting ledger administration




Financial analysis - all companies




Payment workspace




Retail and Commerce IT




Benefits




Cost administration



Financial analysis - current company



Payroll management



Sales order processing and inquiry

Rishabh Agarwal

Sr. Engineering Manager, Dynamics 365 SCM

LinkedIn:

<https://www.linkedin.com/in/rishabh2605>



Integration admin and development



Onboarding

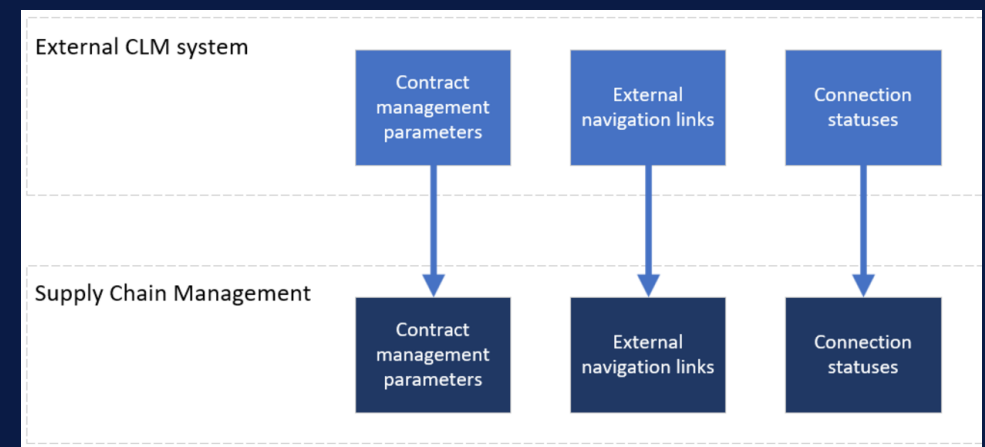
To use the features in Public Preview, you must be running Supply Chain Management version 10.0.42 or later.

This would be available in GA with release 10.0.43.

Enable the Feature in Public Preview

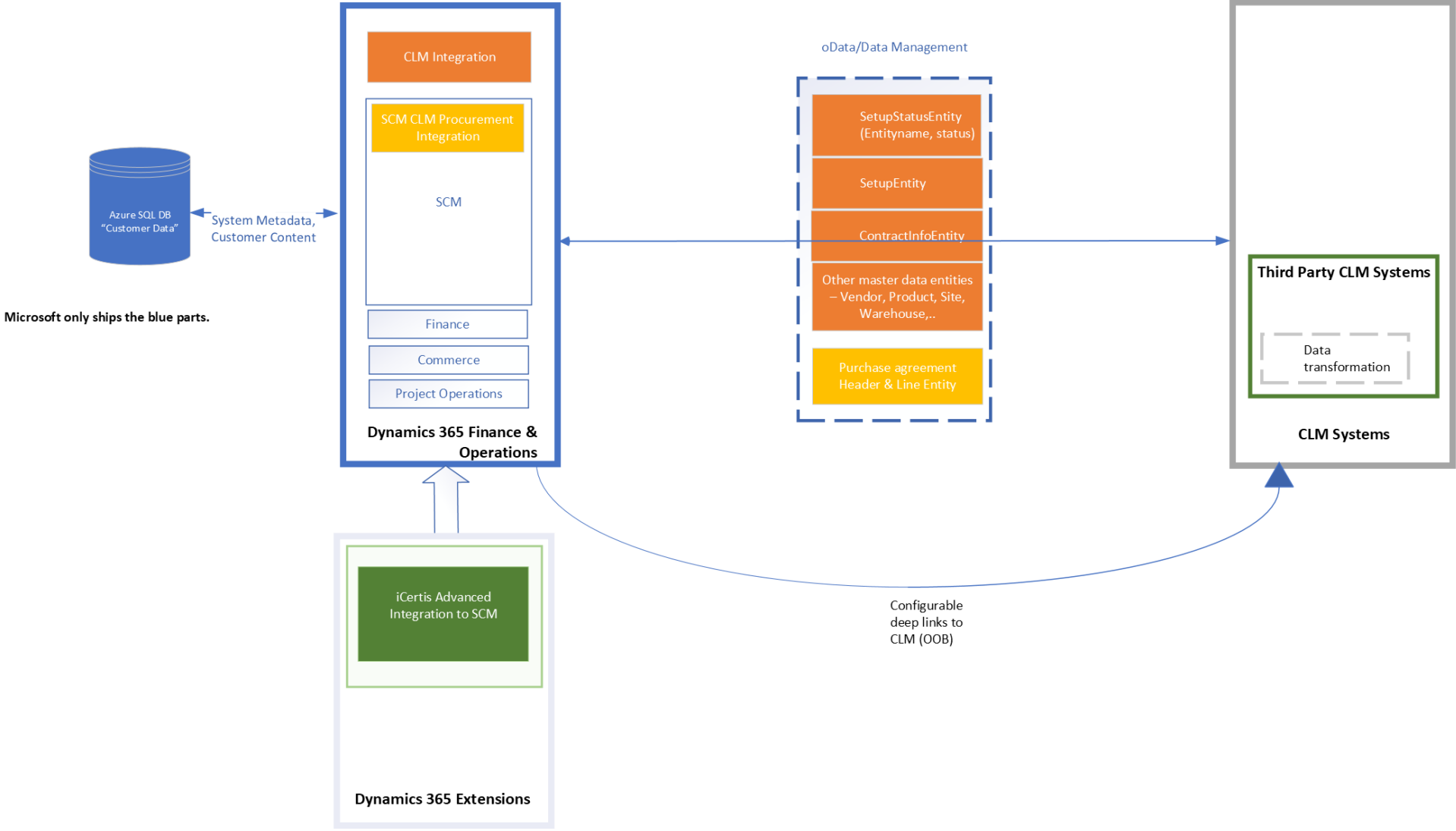
Go to [Feature management](#), and turn on the *(Preview) Integrate with external contract lifecycle management systems* feature.

Initial Setup and Configuration



Refer to data integration and synchronization instructions [here](#).

High level architecture



Optional, can be used to add richer user experience. OOB CLM integration will provide the integration capabilities

Mathieu Binaisse

Senior FastTrack Solution Architect

Email:

mbinaisse@microsoft.com

LinkedIn:

<https://www.linkedin.com/in/mathieu-binaisse-microsoft/>



Integration with 1st party on NDA flow



Set up in Microsoft Dynamics 365

01

Enable the feature

- In Feature management
- Turn on the (Preview) Integrate with external contract lifecycle management systems

02

Set up CLM connection parameters

- Procurement and sourcing > Setup > CLM integration > Contract management parameters
- Connection tab
 - Connection name
 - Base URL
 - External navigation base URL

03

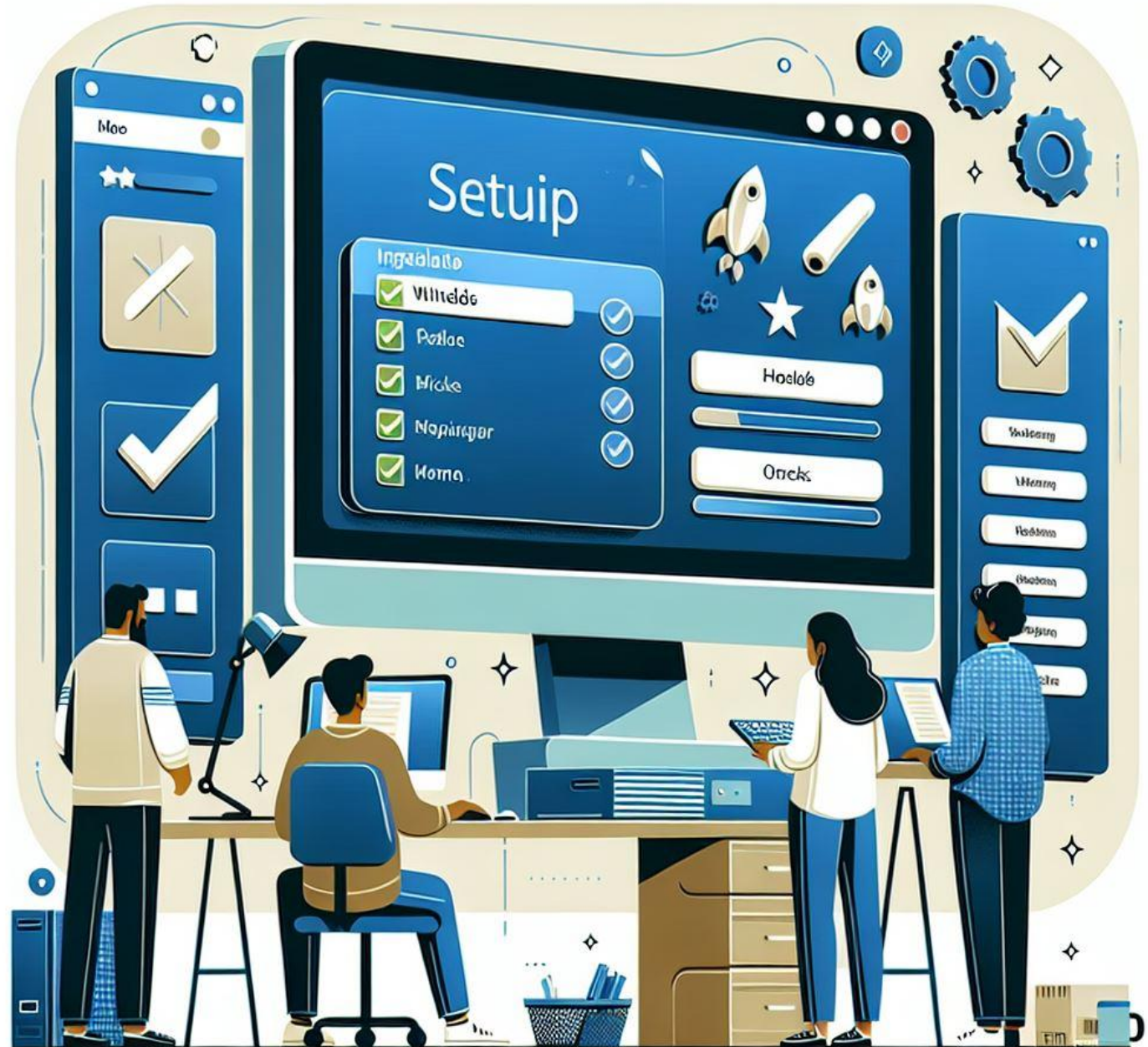
Set up external navigation links

- Procurement and sourcing > Setup > CLM integration > Contract management parameters
- External navigation links
 - Navigation type
 - Navigation name
 - Relative URL
 - Action
 - Navigation link query strings add Parameters with Key and Value

04

Set up your contract types

Demo 1: Set up in Microsoft Dynamics 365



Enable the feature

Feature management

Do not enable new features automatically ⌵

New 1 | Not enabled 364 | Scheduled 1 | [Enable all](#) | [Check for updates](#)

New Not enabled Scheduled All

Feature name	Status	Enable date	Feature added	Feature state	Module
(Preview) Integrate with external contract lifecycle management systems	⚠		10/24/2024	Preview	Procurement and sourcing

(Preview) Integrate with external cont...

Feature added 10/24/2024
Procurement and sourcing
[Learn more](#)

This is a preview feature. By enabling this feature, you are confirming that you have read and understand the preview feature terms and conditions.
[View preview terms](#)

Description

This feature allows you to integrate Microsoft Dynamics 365 Supply Chain Management with an external contract lifecycle management (CLM) system. The feature enables a set of capabilities in Microsoft Dynamics 365 Supply Chain Management to allow for an external contract lifecycle management (CLM) system to integrate. Note that by itself the feature is not a CLM solution. To take advantage the integration capabilities with this feature, an external contract lifecycle management (CLM) solution, leveraging the integration capabilities, is required. When enabled and configured with an external contract lifecycle management (CLM) solution, the lifecycle of purchase agreements can be managed seamlessly between the external contract lifecycle management (CLM) system and Microsoft Dynamics 365 Supply Chain Management.

Comments

[Schedule](#) [Enable now](#)

Enable the feature

Feature management

Do not enable new features automatically ⌵

New **1** | Not enabled **363** | Scheduled **1** | [Enable all](#) | [Check for updates](#)

New | Not enabled | Scheduled | All

Feature name	↑ Status	Enable date	Feature added	↓ Feature state	Module
(Preview) Integrate with external contract lifecycle management systems	🟢	12/16/2024	10/24/2024	Preview	Procurement and sourcing

(Preview) Integrate with external cont...

Feature added 10/24/2024
Procurement and sourcing
[Learn more](#)

This feature was enabled on 12/16/2024

Description

This feature allows you to integrate Microsoft Dynamics 365 Supply Chain Management with an external contract lifecycle management (CLM) system. The feature enables a set of capabilities in Microsoft Dynamics 365 Supply Chain Management to allow for an external contract lifecycle management (CLM) system to integrate. Note that by itself the feature is not a CLM solution. To take advantage the integration capabilities with this feature, an external contract lifecycle management (CLM) solution, leveraging the integration capabilities, is required. When enabled and configured with an external contract lifecycle management (CLM) solution, the lifecycle of purchase agreements can be managed seamlessly between the external contract lifecycle management (CLM) system and Microsoft Dynamics 365 Supply Chain Management.

Comments

[Disable](#)

Set up CLM connection parameters

← Save Options 🔍

Standard view ▾

Contract management parameters

Connection

External navigation links

Set up connection parameters

Configure the connection parameters for the external contract management system. By enabling the external service integration you are affirming that you understand that the data handling, privacy and compliance standards of the external service may not be the same as those provided by the Microsoft Dynamics 365 Service. Please consult the external service's documentation and terms to learn if your organizations security and privacy requirements are met by the external service, including the handling of personal data and geo-residency. Your privacy is important to us. To learn more, read our [Privacy Statement](#).

General

Connection name	Base URL	External navigation base URL
<input type="text" value="CLM instance"/>	<input type="text" value="https://operations-scclminteg..."/>	<input type="text" value="https://operations-scclminteg..."/>

Connection status

Set up external navigation links

Standard view ▾

Contract management parameters

Connection

External navigation links

Set up external navigation links

External navigation links represent parameters for actions that navigate a user to an external Contract Lifecycle Management system. These typically represent predefined business operations within the integrated systems.

[+ New](#) [Edit](#) [Delete](#)

<input type="radio"/> Navigation type	↑ Navigation name	Relative URL	Action
<input type="radio"/> View contract	View	https://operations-scmclmintegr...	Open in new tab
<input type="radio"/> New contract	New	https://operations-scmclmintegr...	Open in new tab

Set up external navigation links

The screenshot shows the 'Options' page for configuring external navigation links. At the top, there is a navigation bar with 'Save', '+ New', and 'Delete' buttons, and a search icon. Below this are four tabs: 'Personalize', 'Page options', 'Edit', and 'Share'. The 'Page options' tab is active, showing 'Security diagnostics', 'Record info', 'Read mode', and 'Advanced filter or sort'. The 'Share' tab shows 'Create a custom alert' and 'Manage my alerts'. Below the tabs, there is a section for 'External navigation links' with a 'Standard view' dropdown. The main content area is titled 'View contract : View' and contains three sections: 'General', 'Preview', and 'Navigation link query strings'. The 'General' section has four input fields: 'Navigation type' (View contract), 'Navigation name' (View), 'Relative URL' (https://operations-scmlminteg...), and 'Action' (Open in new tab). The 'Preview' section shows the 'Absolute URL' as https://operations-scmlmintegration.crm.dynamics.com/main.aspx?pagetype=entityrecord&etn=cr18e_contract&appid=66d0c7df-3ea6-ef11-8a6a-6045bd0491d9&id=%CLMIntegrationContractTable.ExternalContractId%. The 'Navigation link query strings' section has a table with columns 'Key' and 'Value'.

External navigation links | Standard view

View contract : View

General

Navigation type: View contract | Navigation name: View | Relative URL: https://operations-scmlminteg... | Action: Open in new tab

Preview

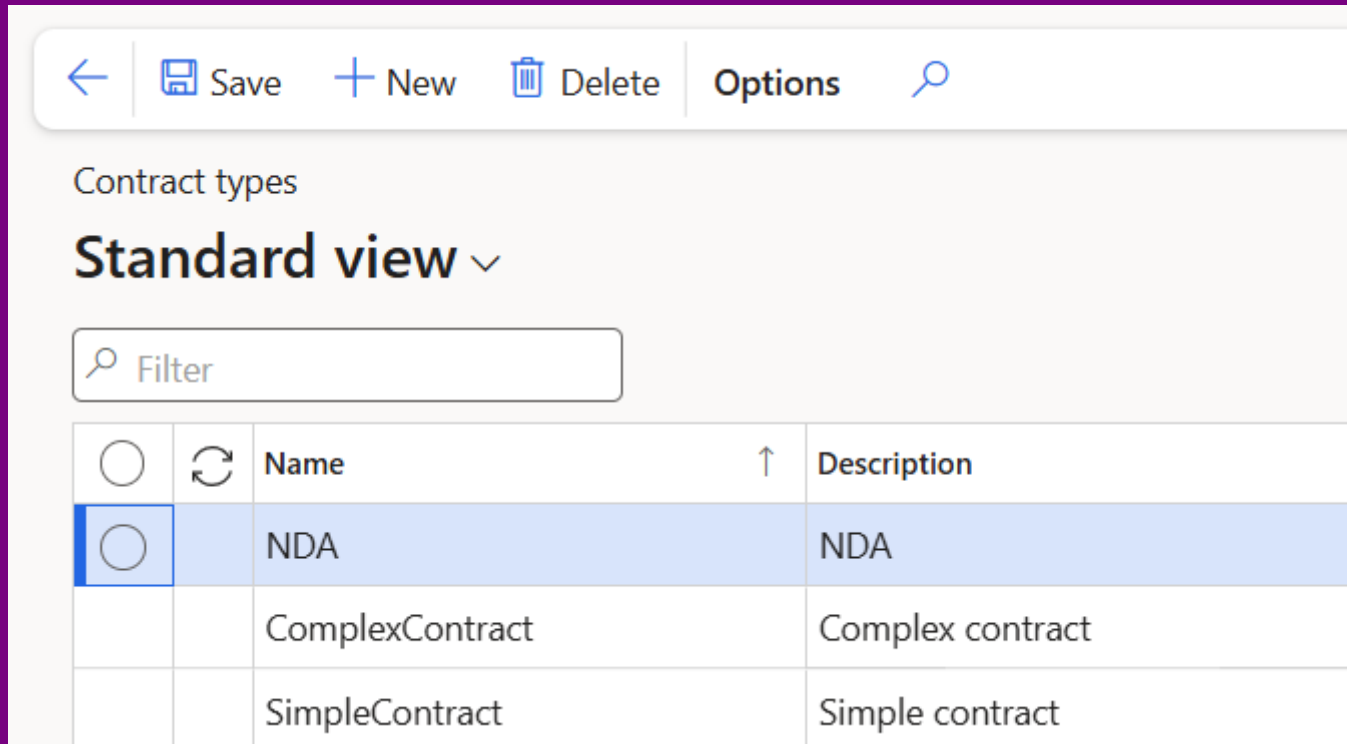
Absolute URL: https://operations-scmlmintegration.crm.dynamics.com/main.aspx?pagetype=entityrecord&etn=cr18e_contract&appid=66d0c7df-3ea6-ef11-8a6a-6045bd0491d9&id=%CLMIntegrationContractTable.ExternalContractId%

Navigation link query strings

+ New | Delete

Key	Value
appid	66d0c7df-3ea6-ef11-8a6a-6... ↕
etn	cr18e_contract
id	%CLMIntegrationContractTable...
pagetype	entityrecord

Set up your contract types



Contract types

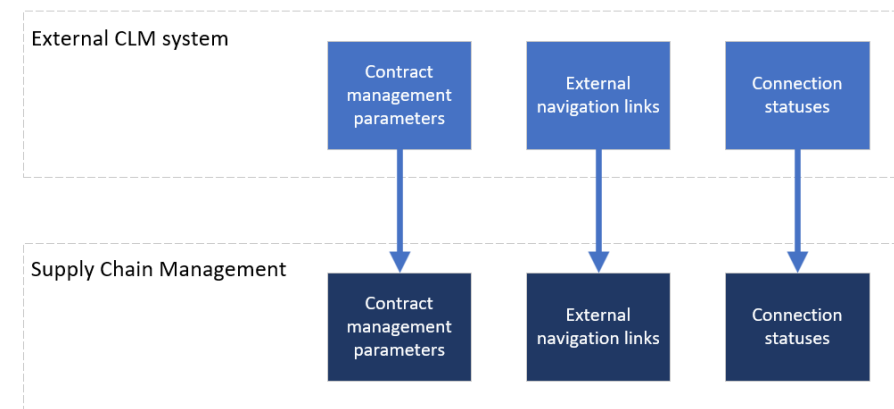
Standard view ▾

Filter

<input type="radio"/>	<input type="radio"/>	Name	↑	Description
<input checked="" type="radio"/>		NDA		NDA
<input type="radio"/>		ComplexContract		Complex contract
<input type="radio"/>		SimpleContract		Simple contract

Use case: Establish a connection

Access the data integration APIs



Entity	Target entity	Public name (OData)	Purpose	Direction
CLM integration service instance	CLMIntegrationServiceInstanceEntity	CLMIntegrationServiceInstances	Set up contract management parameters.	CLM → SCM
CLM integration external navigation links	CLMIntegrationExternalNavigationLinkEntity	CLMIntegrationExternalNavigationLinks	Set up external navigation links.	CLM → SCM
CLM integration external navigation link key-value pairs	CLMIntegrationExternalNavigationLinkKeyValueEntity	CLMIntegrationExternalNavigationLinkKeyValues	Set up query strings for external navigation links.	CLM → SCM

Connection status

- *EstablishmentStatus* – This status signifies whether a connection has been successfully established, allowing the external CLM system to communicate with Supply Chain Management.
 - NotStarted – The process of establishing a connection has not commenced.
 - Success – A connection has been successfully established.
 - Error – The attempt to establish a connection failed.
- *ConfigurationStatus* – This status reflects whether external navigation links have been configured.
 - NotStarted – The configuration of external navigation links has not yet started.
 - Success – External navigation links have been configured successfully.
 - Error – The configuration of external navigation links was unsuccessful.

Demo 2: Establish a connection



- Home
- Create
- Learn
- Apps
- Tables
- Flows
- Solutions
- More
- Power Platform

[+ New solution](#)
[← Import solution](#)
[Open AppSource](#)
[Publish all customizations](#)
[Set preferred solution](#)
[See history](#)

Search

Solutions



Set your preferred solution
Select where your updates will be saved so your work stays organized.

Current preferred solution

Common Data Services Default Solution

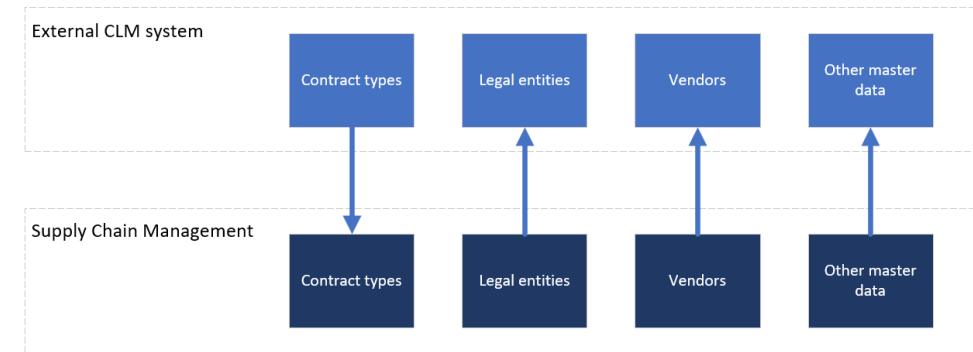
[Manage](#)

×

[Unmanaged](#)
[Managed](#)
[All](#)

Display name	Name	Created	Version	Publisher	Solution check
CLMIntegration	CLMIntegration	1 month ago	1.0.0.0	CDS Default Publisher	Hasn't been run
Common Data Services Def... Preferred solution	Cr1db2b	1 month ago	1.0.0.0	CDS Default Publisher	Hasn't been run
Default Solution	Default	1 month ago	1.0	Default Publisher for op...	Not supported for analysis

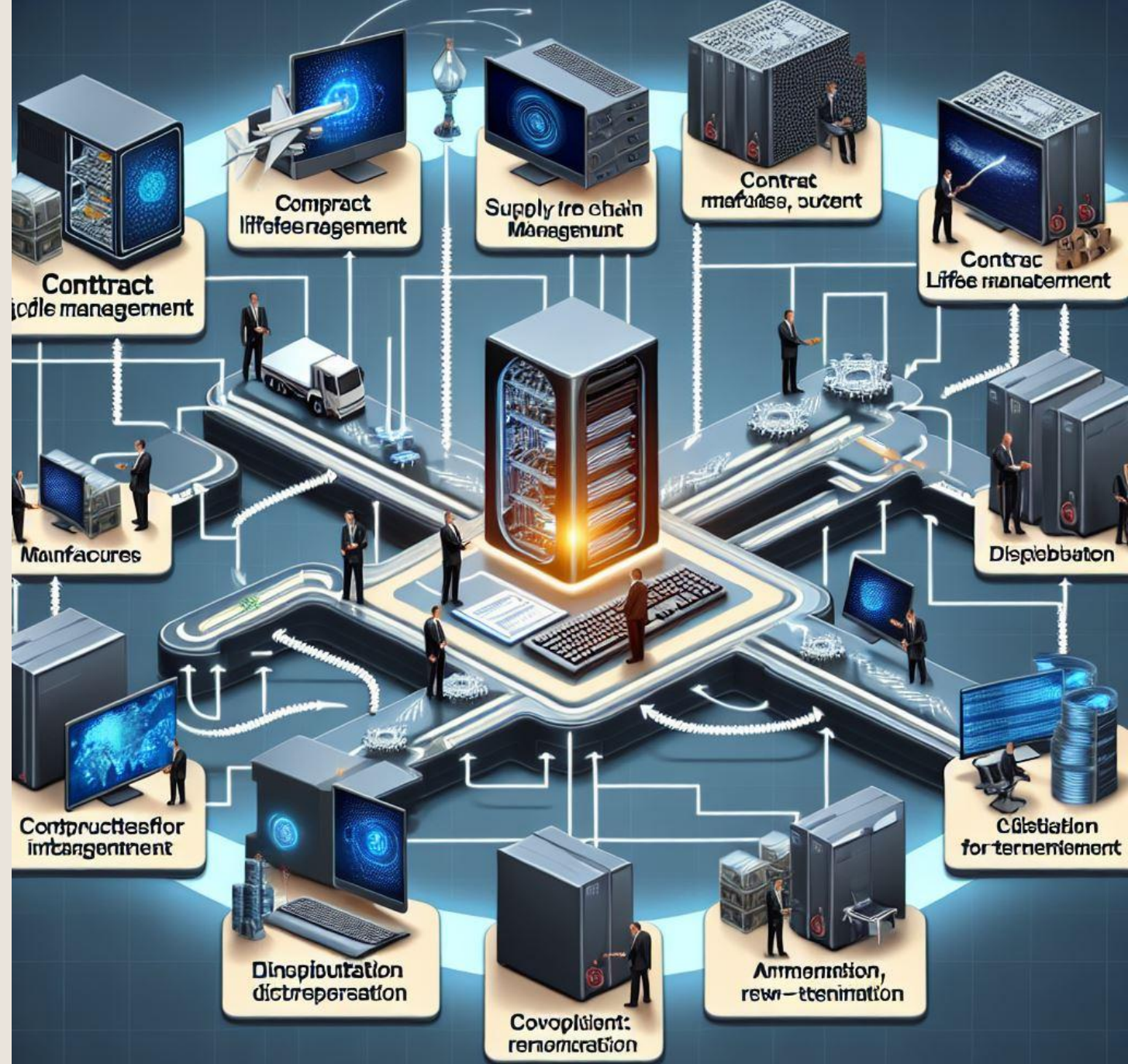
Use case: Synchronize master data



Access the data integration APIs

Entity	Target entity	Public name (OData)	Company-specific	Required by	Direction
CLM integration contract types	CLMIntegrationContractTypeEntity	CLMIntegrationContractTypes	No	Contracts	CLM → SCM
Legal entities	OMLegalEntity	LegalEntities	No	Contracts/Purchase agreements	SCM → CLM
Vendors V2	VendVendorV2Entity	VendorsV2	Yes	Contracts/Purchase agreements	SCM → CLM
Contacts V2	smmContactPersonV2Entity	ContactPersons	Yes	Contracts/Purchase agreements	SCM → CLM
Purchase agreement classification	PurchAgreementClassificationEntity	Not applicable	No	Purchase agreements	SCM → CLM
Sites V2	InventOperationalSiteV2Entity	OperationalSitesV2	Yes	Purchase agreements	SCM → CLM
Warehouses	InventWarehouseEntity	Warehouses	Yes	Purchase agreements	SCM → CLM
Procurement product categories	CatProcurementProductCategoryEntity	ProcurementProductCategories	No	Purchase agreements	SCM → CLM
CLM integration released products	CLMIntegrationReleasedProductEntity	CLMIntegrationReleasedProducts	Yes	Purchase agreements	SCM → CLM
Released product variants V2	EcoResReleasedProductVariantV2Entity	ReleasedProductVariantsV2	Yes	Purchase agreements	SCM → CLM
Units	UnitOfMeasureEntity	UnitsOfMeasure	No	Purchase agreements	SCM → CLM
Terms of payment	PaymentTermEntity	PaymentTerms	Yes	Purchase agreements	SCM → CLM
Currencies	CurrencyEntity	Currencies	No	Purchase agreements	SCM → CLM
Vendor payment method	VendorPaymentMethodEntity	VendorPaymentMethods	Yes	Purchase agreements	SCM → CLM
Payment schedule	PaymentScheduleEntity	PaymentSchedules	Yes	Purchase agreements	SCM → CLM
Terms of delivery	DeliveryTermsEntity	DeliveryTerms	Yes	Purchase agreements	SCM → CLM
Projects	ProjectEntity	Projects	Yes	Purchase agreements	SCM → CLM
Cash discount	CashDiscountEntity	CashDiscounts	Yes	Purchase agreements	SCM → CLM
CLM integration country/regions	CLMIntegrationAddressCountryRegionEntity	CLMIntegrationAddressCountryRegions	No	Purchase agreements	SCM → CLM

Demo 3: Synchronize master data





Contoso Entertainment System USA

Search people ...

APPS

< December 2024 >

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8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Work items assigned to me

Work items will be displayed here after they are assigned to you.



Business performance analytics (preview)



Business performance planning



Copilot for Finance (Preview)



Demand planning



Human Resources



Inventory Visibility



Invoice capture

WORKSPACES



Bank management



Cost administration



Financial analysis - current company



Payroll management



Retail and Commerce IT



Benefits



Cost analysis



Financial period close



People



Sales order processing and inquiry



Budget planning



Cost control



Fixed asset management



Personnel management



Sales return processing



Business document management



Customer credit and collections



General journal processing



Pricing management



Store financials



Business processes for human resources



Customer invoicing



Globalization studio



Product readiness for discrete manufacturing



Store management



Business processes for



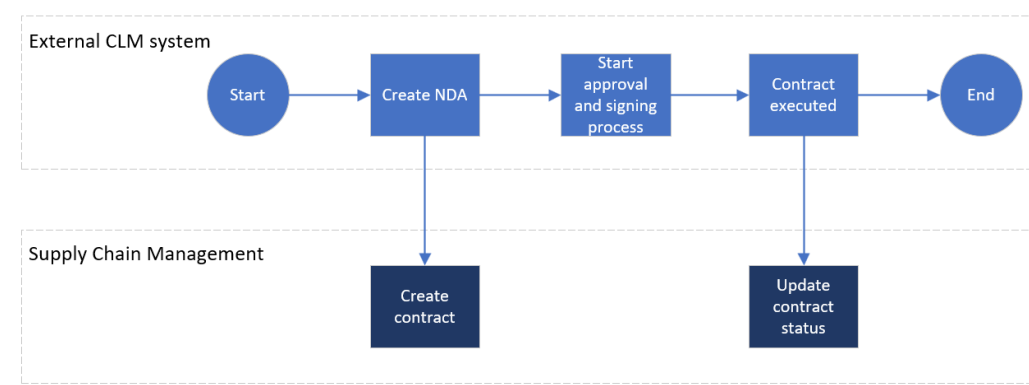
Product readiness for



Use case: Synchronize contracts

Supported Scenarios:

- Create a non-disclosure agreement (NDA)
- Create a purchase contract
- Create a contract amendment



Entity	Target entity	Public name (OData)	Company-specific	Direction
CLM integration contract	CLMIntegrationContractEntity	CLMIntegrationContracts	Yes	CLM → SCM
CLM integration purchase agreements	CLMIntegrationPurchaseAgreementHeaderEntity	CLMIntegrationPurchaseAgreements	Yes	CLM → SCM
CLM integration purchase agreement lines	CLMIntegrationPurchaseAgreementLineEntity	CLMIntegrationPurchaseAgreementLines	Yes	CLM → SCM

Example Create shareable, secured deep links

[https://\[baseURI\]/data/CLMIntegrationContracts/Microsoft.Dynamics.DataEntities.GenerateContractDetailFormURLByContractId](https://[baseURI]/data/CLMIntegrationContracts/Microsoft.Dynamics.DataEntities.GenerateContractDetailFormURLByContractId)

Demo 4: Synchronize contracts



Resources



Additional resources

- Learn- [Contract lifecycle management integration overview \(preview\) - Supply Chain Management | Dynamics 365 | Microsoft Learn](#)
- Yammer for procurement and sourcing area -[D365 Procurement and Sourcing](#)
- Ideas portal-[Ideas](#)

- Icertis Resources:
 - Learn more: [Icertis Integration with Microsoft](#)
 - Contact us: [Icertis on Microsoft AppSource](#)
 - Join Icertis demo: [Icertis Monthly Demos](#)



QUESTIONS

Dankie

Faleminderit

Shukran

Chnorakaloutioun

Hvala

Blagodaria

Děkuji

Tak

Dank u

Tānan

Kiitos

Merci

Danke

Ευχαριστώ

A dank

Mahalo

הודות.

Dhanyavād

Köszönöm

Takk

Terima kasih

Grazie

Grazzi

Thank you!

감사합니다

Paldies

Choukrane

Aċiū

Благодарам

ありがとうございました

谢谢

Баярлалаа

Dziękuję

Obrigado

Mulțumesc

Спасибо

Ngiyabonga

Ďakujem

Tack

Nandri

Kop khun

Teşekkür ederim

Дякую

Хвала

Diolch