Microsoft Dynamics 365

Contract Lifecyle Management Integration with Supply Chain Management

Dynamics 365 Fastrack
Architecture Insight Series

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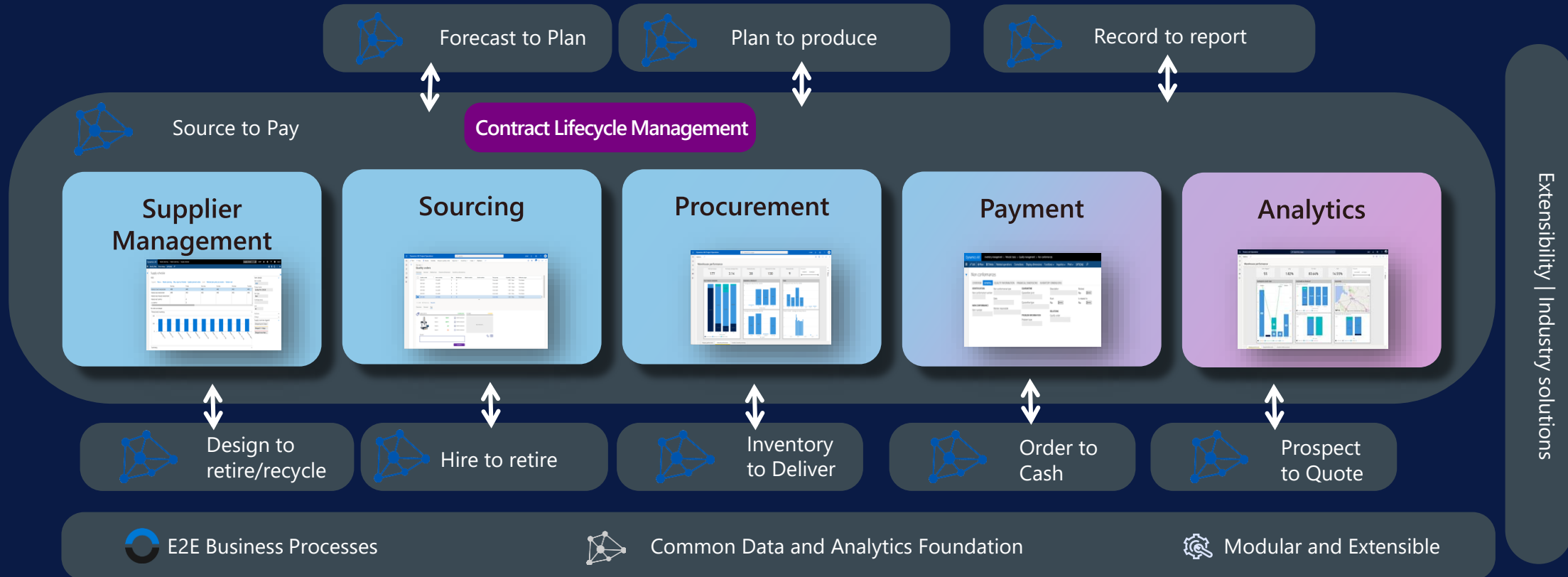**Vivek Budhatrao** - Senior Product Manager, Icertis

Agenda

- CLM Overview

- Business Process

- Integration with Icertis

- Integration overview
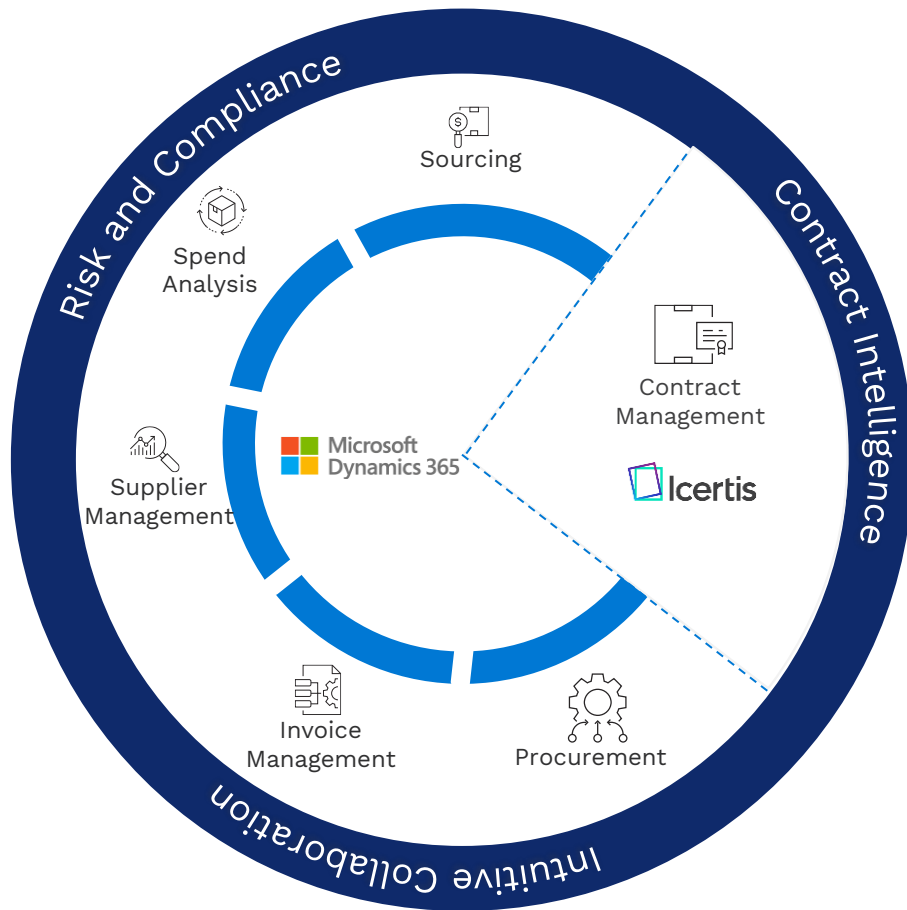
- Integration with external system

- Resources

- Q&A

Overview

Source to Pay in the ERP

Forecast to Plan

Plan to produce

Record to report

Source to Pay

Contract Lifecycle Management

Supplier Management

Sourcing

Procurement

Payment

Analytics

Design to retire/recycle

Hire to retire

Inventory to Deliver

Order to Cash

Prospect to Quote

Extensibility | Industry solutions

E2E Business Processes

Common Data and Analytics Foundation

Modular and Extensible

Microsoft Dynamics 365

Strategic Partnership

Gain more visibility across their S2P process areas

Drive Compliance and Risk mitigation

Strengthen Vendor relationships

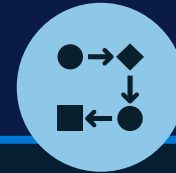Advanced Insights to support informed decision-making

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
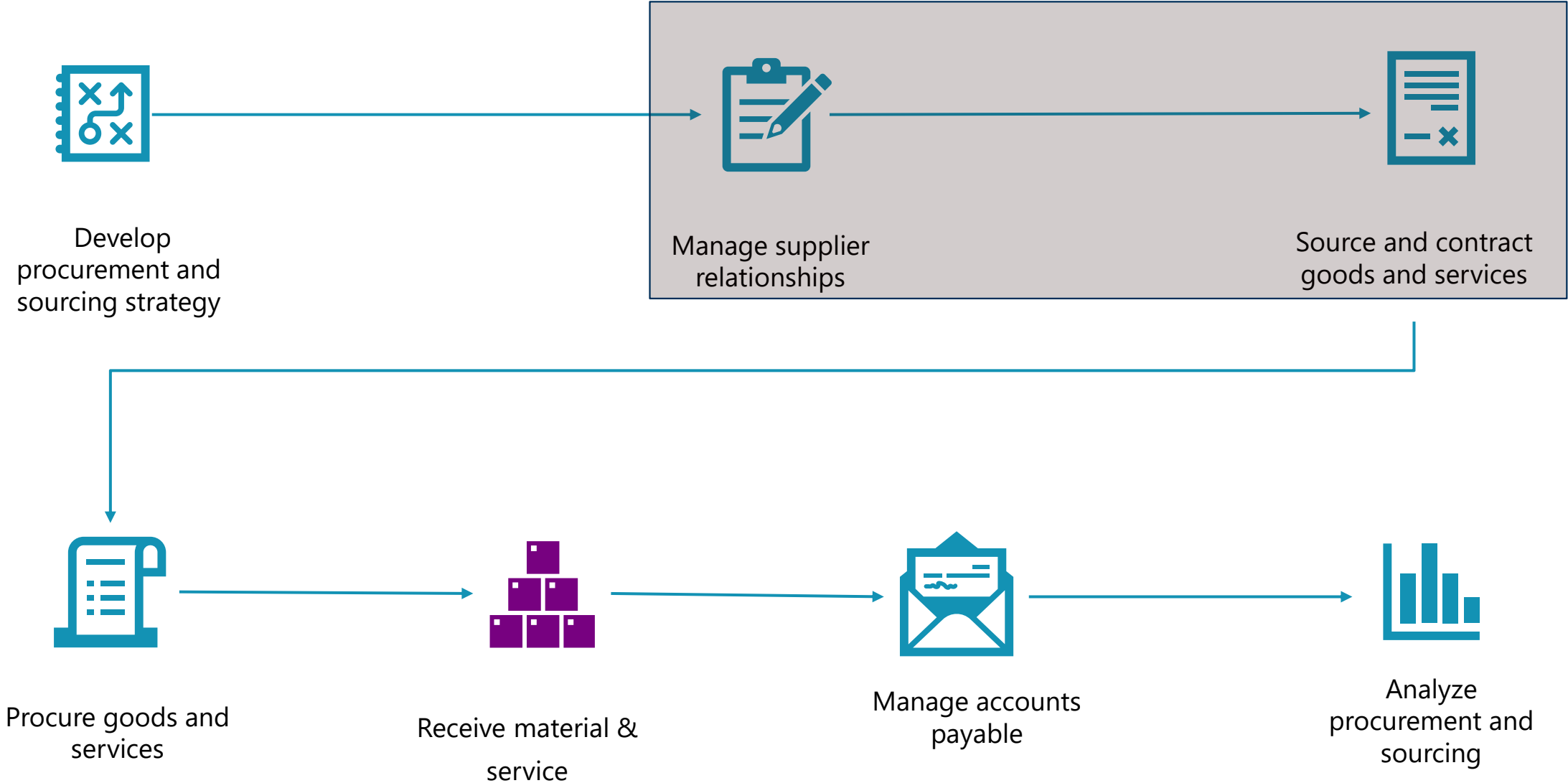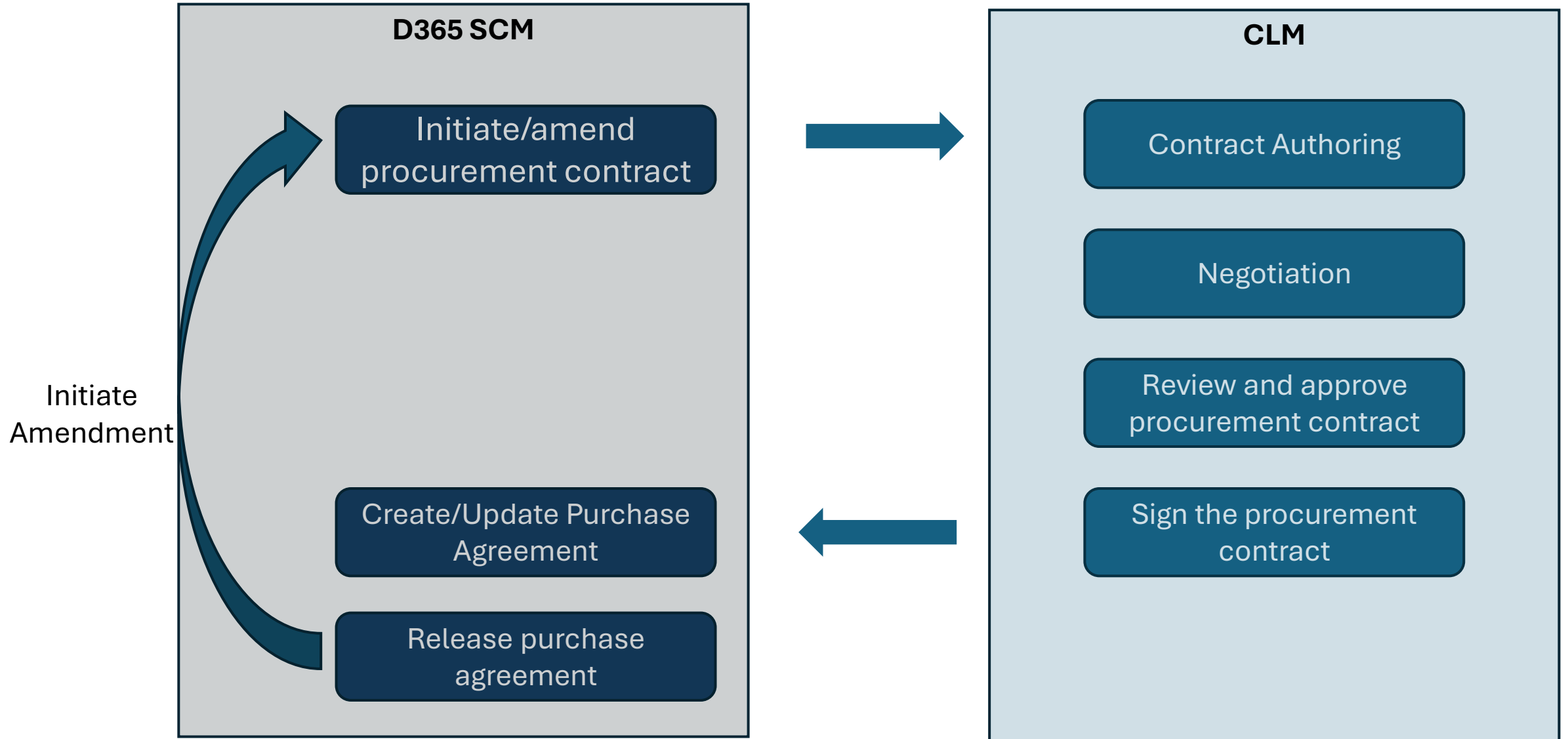
Contract Flows

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Business Process

Source to Pay

Source to Pay Business Process Areas

Develop procurement and sourcing strategy

Manage supplier relationships

Source and contract goods and services

Procure goods and services

Receive material & service

Manage accounts payable

Analyze procurement and sourcing

Source to Pay

Inventory to Deliver

Purchase agreement flow
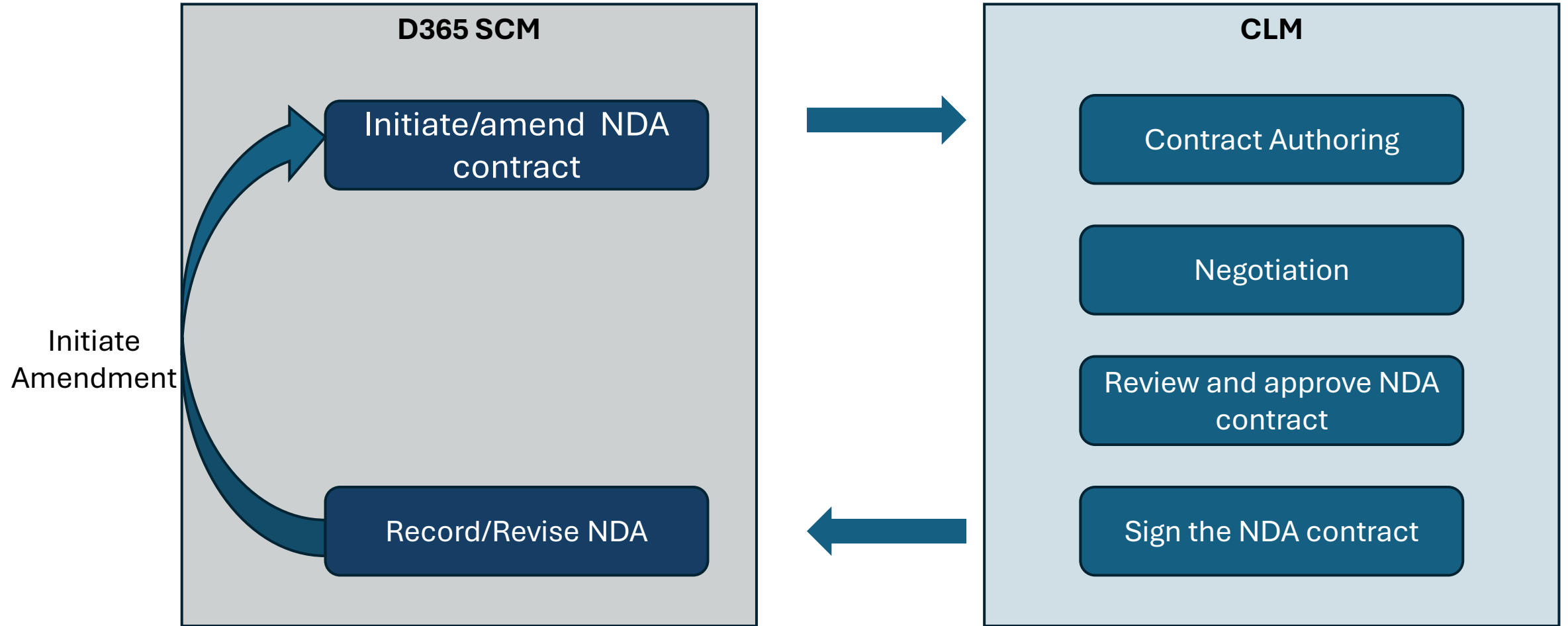
Onboarding

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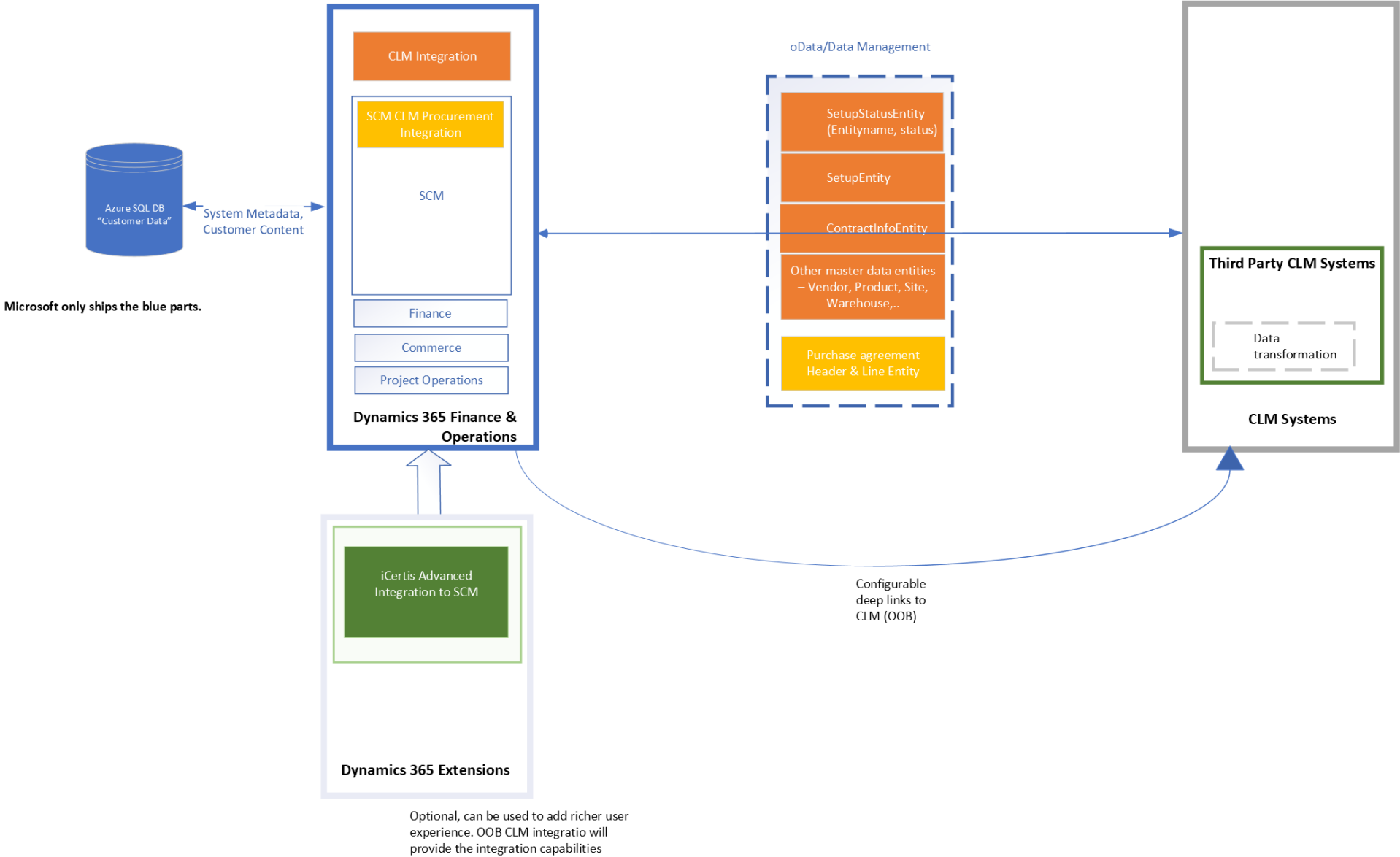
Go to Feature management, and turn on the *(Preview) Integrate with external contract lifecycle management systems* .feature.

Initial Setup and Configuration
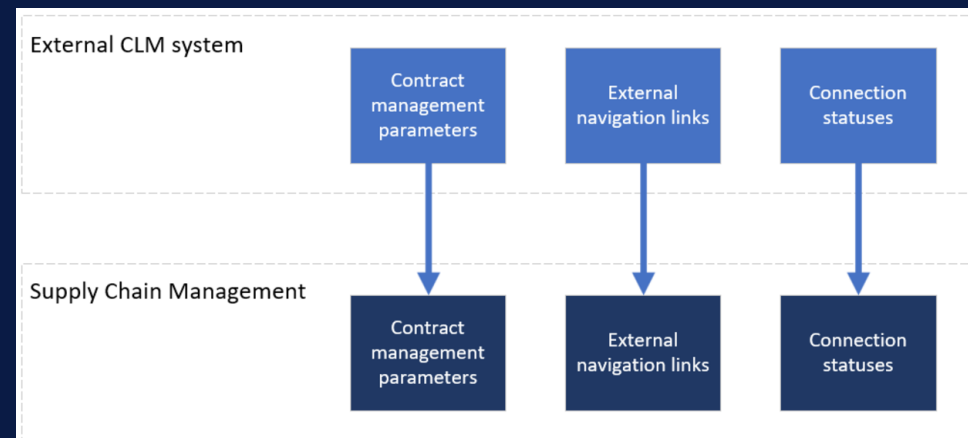
Refer to data integration and synchronization instructions here.

High level architecture
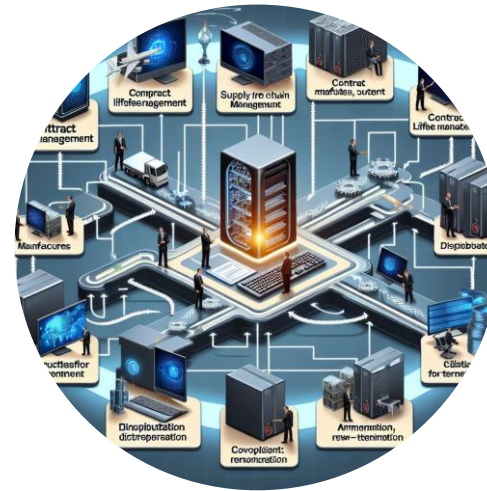
Integration between Microsoft Dynamics 365 SCM and a 1ˢᵗ or 3ʳᵈ Party CLM System

Setup in Microsoft Dynamics 365

Establish a connection

Synchronize master data

Synchronize contracts

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

Use case: Establish a connection
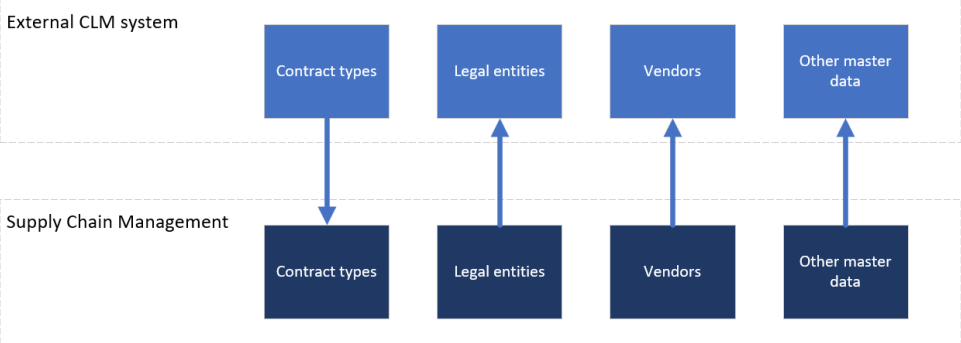
Access the data integration APIs
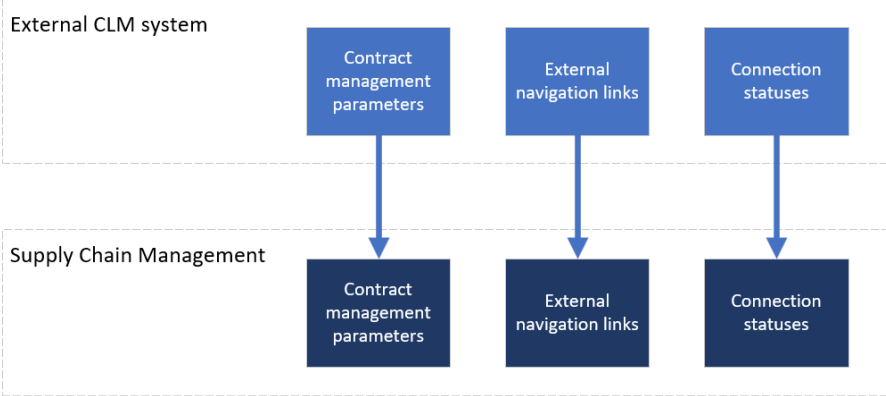
Entity	Target entity	Public name (OData)	Purpose	Direction
CLM integration service instance	CLMIntegrationServiceInstanceEntity	CLMIntegrationServiceInstances	Set up contract management parameters.	CLM → SCM
CLM integration external navigation links	CLMIntegrationExternalNavigationLinkEntity	CLMIntegrationExternalNavigationLinks	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.

Use case: Synchronize master data

External CLM system
Contract types | Legal entities | Vendors | Other master data

Supply Chain Management
Contract types | Legal entities | Vendors | Other 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

Use case: Synchronize contracts

Supported Scenarios:

- Create a non-disclosure agreement (NDA)

- Create a purchase contract

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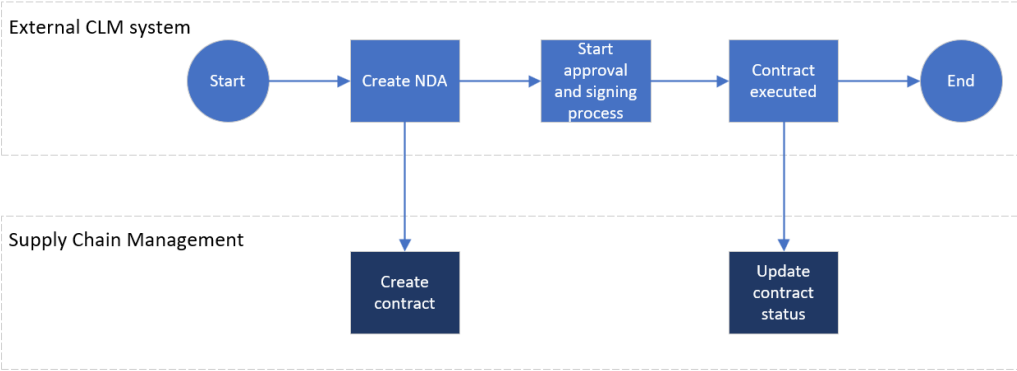
Entity	Target entity	Public name (OData)	Company-specific	Direction
CLM integration contract	CLMIntegrationContractEntity	CLMIntegrationContracts	Yes	CLM → SCM
CLM integration purchase agreements	CLMIntegrationPurchaseAgreementHeaderEntity	CLMIntegrationPurchaseAgreements	Yes	CLM → SCM
CLM integration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

Example Create shareable, secured deep links
https://[baseURI]/data/CLMIntegrationContracts/Microsoft.Dynamics.DataEntities.GenerateContractDetailFormURLByContractId

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Resources

Additional resources

- Learn- [Contract lifecycle management integration overview (preview) - Supply Chain Management | Dynamics 365 | Microsoft Learn](#)

- Techtalk- [Contract Lifecycle Management Integration with D365 Supply Chain Management](#)

- 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](#)