The Icertis Experience for Microsoft Dynamics

Increase Revenue, Reduce Risk, and Accelerate Sales by Connecting the Quote-to-Cash Process to Contract Management

Microsoft Dynamics 365

The Challenge

A disconnect between sales and the contracting process leads to **smaller deal sizes** and **missed opportunities**. In addition to lost **revenue**, a lack of coordination between departments can cause other issues, including:

- Delays in the QTC process have a **negative impact on timely invoicing and revenue recognition.**

- Manual contract management processes need additional resources to keep pace with a rise in sales volume, **increasing cost of sales.**

- Difficulty in enforcing standards results in maverick contracts, noncompliance and **significant legal risk.**

- Pressure to close deals becomes an unintentional incentive to compromise on contracting standards, resulting in **damaged reputations**.

Experience the full capability of the Icertis Contract Intelligence (ICI) platform—**from within Microsoft Dynamics.**

How It Works

The Icertis Experience for Microsoft Dynamics works with the Icertis Contract Intelligence (ICI) platform, providing a unified solution encompassing both customer relationship management (CRM) and contract lifecycle management (CLM). Experience a full range of contract management features from within the Microsoft Dynamics application. Gain a competitive advantage by providing sales organizations with these capabilities:

- **Create contracts or contract requests with a single click**—without leaving the familiar Dynamics application.

- Leverage an intelligent rules engine to **manage contract authoring, workflow, milestones and approvals.**

- Negotiate contracts and track redlining and versioning **from within Microsoft Word.**

- Translate commercial terms such as products, pricing and deal information, into contractual data that's **easy to search and easy to measure.**

- **Eliminate errors** and duplication by automatically populating key attributes from Dynamics, into the ICI platform.

- Avoid mismatches or delays with the ability to **seamlessly transfer and synchronize data between Dynamics and the ICI platform.**
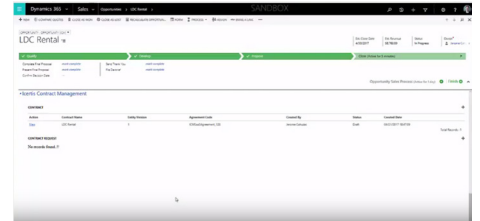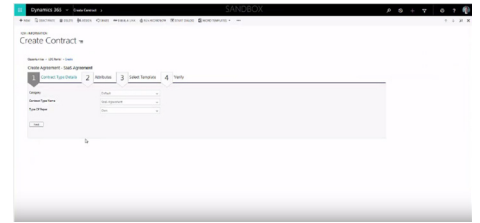
Benefits

- Reduce the quote-to-cash cycle time to accelerate sales

- Improve contract quality by facilitating collaboration

- Reduce rework with easy-to-use templates and standardized language

- Enable downstream compliance and report on key sales and contracting metrics

- Identify, assess and automatically mitigate risk—without placing an additional burden on sales

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