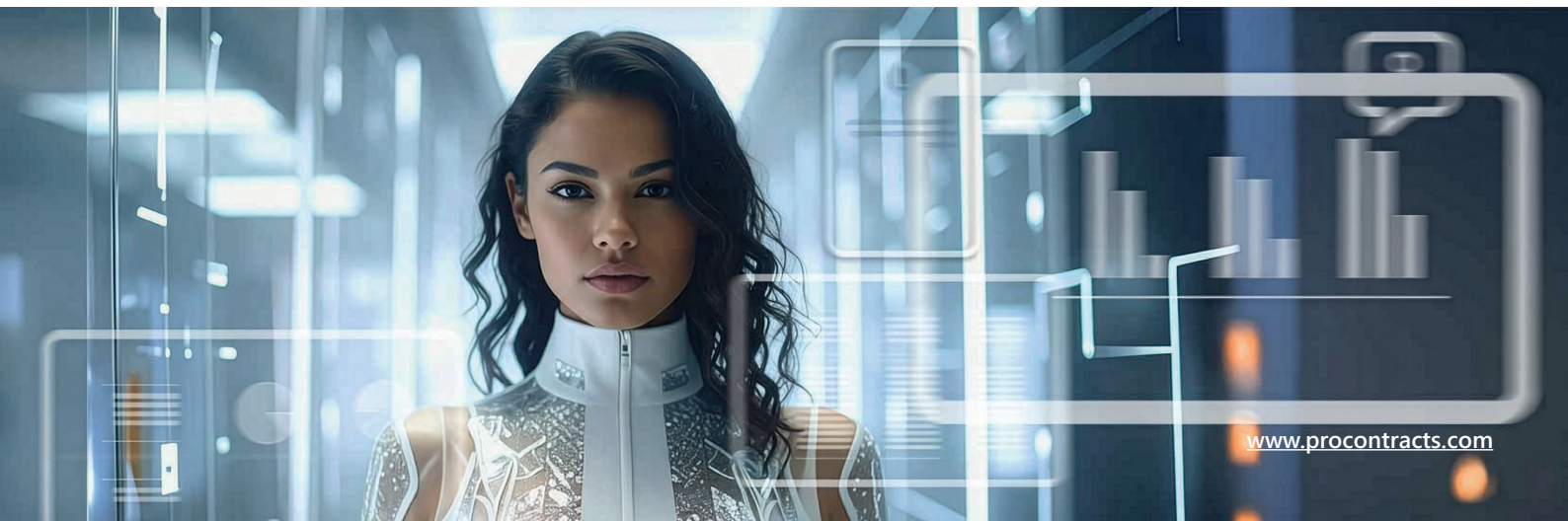


www.procontracts.com

AI CONTRACT LIFECYCLE MANAGEMENT

WHITE PAPER 2026



EVERYTHING
YOU WILL EVER NEED
FOR CONTRACT MANAGEMENT

70 %

less effort

50 %

faster processes

100 %

contract control

96 %

customer retention



Contracts are among a company's most important assets. They govern business relationships, minimise risks and provide the foundation for sustainable business success. **proCONTRACTS** provides companies with a modern, AI-powered Contract Lifecycle Management (CLM) solution that digitally maps the entire contract lifecycle with full trans-

parency and efficiency. Through intelligent process automation, comprehensive compliance features and seamless integration into existing system environments, **proCONTRACTS** helps companies reduce risks, accelerate processes and unlock the full potential of their contract data.

A background image showing several pairs of hands in business attire (suits) gathered around a table, looking at and pointing to various documents and charts, suggesting a collaborative business meeting.

WHY TRADITIONAL CONTRACT MANAGEMENT REACHES ITS LIMITS

A contract is not a static document. It is part of a business relationship, triggers tasks, contains deadlines and obligations, and evolves across multiple versions.

When documents, master data, communications and approvals are managed separately, process disruptions occur precisely where reliability is most important.

Dispersed information

Documents, emails and contract data are stored in different locations. Information is difficult to find and often tied to individual employees.

Manual monitoring

Deadlines, renewals and obligations are tracked using lists or calendars. This approach does not scale effectively and is prone to error.

Unclear approval processes

There is no transparency regarding who needs to review or approve a contract, or which stage of the process the contract has reached.

Limited reporting and analysis

Unstructured documents do not provide a reliable basis for analysing contract terms, costs, risks or business opportunities.

Inconsistent versions

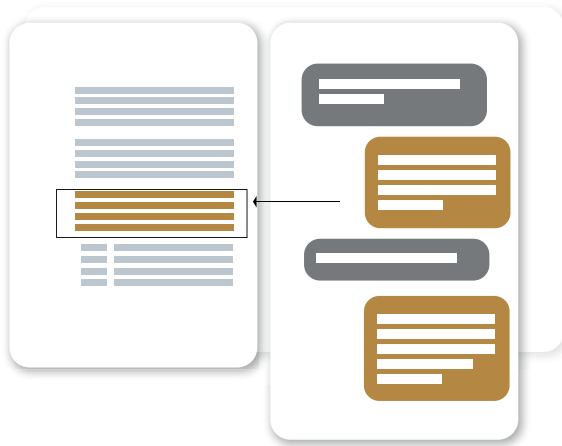
Different templates and contract versions increase the need for coordination and create additional risks.

Additional data silos

An isolated CLM solution can result in duplicate data maintenance if customer, supplier and organisational data is already available in Dynamics 365.

The key question is therefore not simply how contracts can be stored digitally. What matters is how contract processes can be connected to the company's operational workflows.

CONTRACT MANAGEMENT BUILT FOR MICROSOFT DYNAMICS 365



How proCONTRACTS makes contract processes transparent, secure and efficient directly within the existing Microsoft ecosystem

proCONTRACTS is not an isolated contract database connected through an additional interface. proCONTRACTS is an extension for Microsoft Dynamics 365. It requires a corresponding Dynamics 365 environment and enhances it with end-to-end Contract Lifecycle Management. Contract data, roles, customer and supplier relationships, and processes therefore remain within the platform in which many teams already work.

CUSTOMISABLE VIEWS OF CUSTOMER, SUPPLIER AND OTHER CONTRACTS

Pre-contract phase

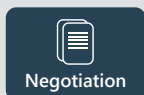


Drafting

CONTRACT DESIGN

Create complex contracts in minutes. Give your employees the ability to easily create contracts. Template-based configurator.

- Template-based configurator templates with AI
- Rule-based document templates with AI
- Automated contract filling
- Contract hierarchies



Negotiation

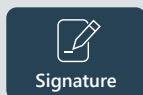


Approval

CONTRACT REVIEW AND NEGOTIATION

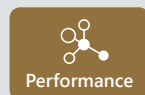
Accelerate your contract process through seamless collaboration and increase productivity.

- All information in one place
- Automation of the approval process
- e-Signatur
- Multiple signatories



Signature

Contract phase



Performance

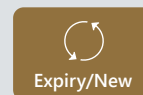
CONTRACT SIGNING AND EXECUTION

Speed up the time to signing and know exactly when your contracts expire.

- Easily view contract status
- Contract renewal
- Contract archiving



Management



Expiry/New

CONTRACT ANALYSIS

Monitor contract KPIs to have all relevant information at your fingertips.

- Analyse key metrics
- Comprehensive dashboards
- Track contract lifecycles



Archiving

Single Point of Truth

Contracts, deadlines, budgets, approvals, documents and histories are centrally available.

Automation

Automatically trigger reminders, tasks, reviews and approvals based on predefined rules.

Transparency

Dashboards, filters and KPIs provide a 360-degree view of the entire contract portfolio.

Native process integration

Existing data, roles and hierarchies in Dynamics can be incorporated into contract processes.

The integrated solution for managing the entire contract lifecycle

Key benefits

- Central overview of all contracts
- Never miss another deadline
- Greater efficiency through automation
- Increased transparency and compliance
- AI-powered assistance
- Seamless integration with Microsoft Dynamics 365
- Well-informed management decisions

TODAY



contract

adjustment

Contract creation

Templates, standardised building blocks and contract variables for consistent documents

Deadlines and key dates

Monitor contract terms, termination dates, renewals and obligations.

Workflows

Digital review and approval processes with roles, rules and escalation procedures.

Approval process

Redlining, version control and contract-related communication.

Reporting

Live dashboards, KPIs, filters, and export and analysis functions.

Compliance and audit

Logging of changes and decisions, together with rule-based reviews.

Digital signatures

Integration of suitable signature solutions, such as DocuSign.

OPERATIONAL BENEFITS AND STRATEGIC IMPACT



Management

Overview of risks, obligations, costs and business opportunities.

Make better-informed decisions based on structured contract data.



Legal

Full transparency regarding versions, deviations and review statuses

More time for legal assessment instead of searching for information and manually tracking processes.



Procurement

Maintain an overview of supplier contracts, terms and regulatory compliance

Better deadline monitoring and systematic approvals



Sales

Customer contracts directly within the context of the customer relationship

Faster coordination and a shorter time to signature



Controlling

Contract KPIs, budgets, contract terms and analyses

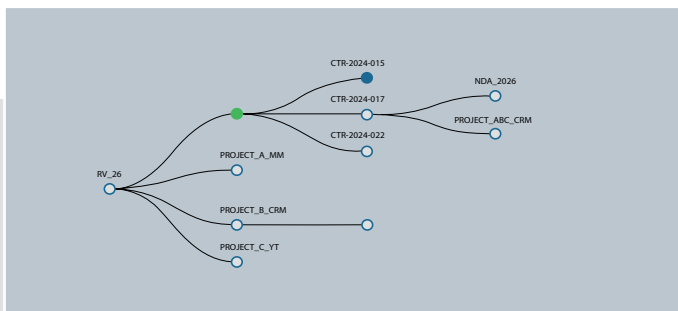
Greater transparency regarding financial implications



IT

CLM within the existing Dynamics platform

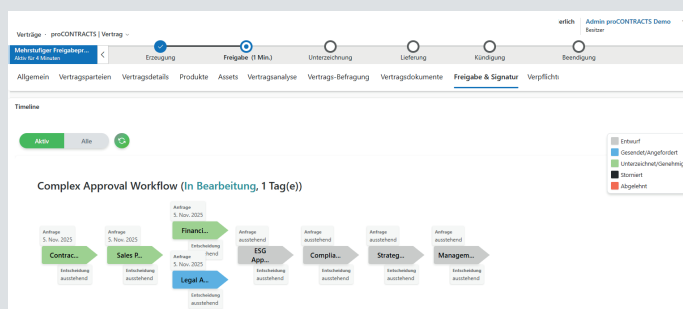
Fewer isolated solutions



proCONTRACTS connects Management, Legal, Procurement, Sales, IT and Controlling directly within Microsoft Dynamics 365. This creates seamless contract processes without system disruptions, data silos or duplicate data maintenance.

Why proCONTRACTS

- Native Microsoft architecture instead of a connected third-party platform
- More than conventional contract management
- Extensive configurability instead of costly custom development
- Full data sovereignty within your own Microsoft tenant
- Developed for medium-sized businesses and enterprise organisations
- AI assistance that delivers direct business value



Added value for every department, efficiency for the entire company

proCONTRACTS supports a wide range of specialist departments with powerful functions and seamless processes throughout the entire contract lifecycle. Whether in Service, Sales, Procurement, Administration or Management, every department benefits from individually tailored functions that increase transparency, accelerate processes and reduce administrative effort.

1.

Shared data foundation

Contract information can be linked to customers, suppliers, contacts, activities and other records in Dynamics 365.

2.

Familiar working environment

Teams work within a familiar Microsoft interface. This reduces the need to switch between systems and encourages user adoption.

3.

End-to-end automation

Roles, hierarchies and process logic from the Dynamics environment can be used for reviews, approvals and follow-up activities.

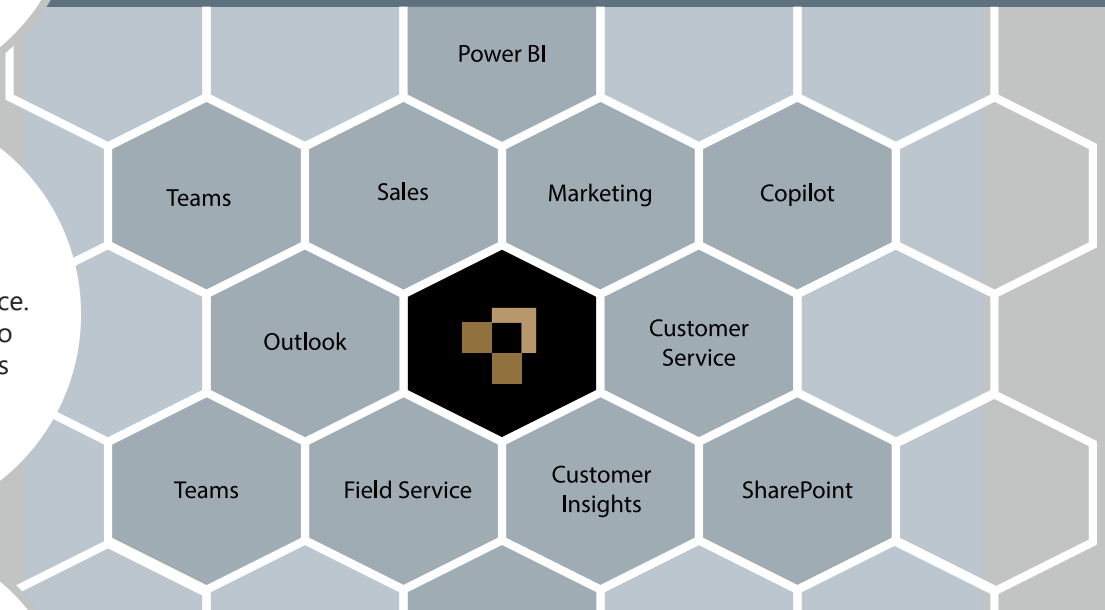
4.

Extensible

Microsoft ecosystem

proCONTRACTS can be connected to Microsoft applications and complementary services. Depending on the scenario, this can also include digital signature solutions.

Contract management directly within the dynamics ecosystem



proCONTRACTS was developed for use with Microsoft Dynamics 365 (Customer Engagement) and requires a corresponding Dynamics 365 environment. This means that the solution operates exactly where relationships, responsibilities and process data already exist. The added value comes from a shared platform logic. Contracts are connected to relevant business data and processes instead of being recreated in a separate application.

Specialist departments benefit from a seamless contract process. IT benefits because there is no need to establish another completely separate platform with its own user management, data structures and integration logic. Configuration and customisation options allow contract types, views, workflows and rules to be adapted to the company's specific requirements.

CASE STUDY: EMS Electro Medical Systems

1. Challenge

Digitalising case management in the Service and Maintenance departments and integrating it into the existing CRM system.

Traditional service case process (before the introduction of proCONTRACTS):

- Customer contacts Customer Service
- Information is recorded by Customer Service
- Information is forwarded to the enterprise resource planning system
- Various tasks are triggered in the enterprise resource planning system

THE RESULT

- Incorrect information
- Information was lost
- It was difficult to verify whether data was up to date

2. Solution

proCONTRACTS



»proCONTRACTS impressed us with its extensive functionality, its straightforward integration into Dynamics 365 and its adaptability to our individual requirements.«

Ignacio Fornies
CRM Manager, EMS

3. Result

The CRM system introduced at EMS by CRMFIRST is primarily used for case management. Added value for the customer:

- Very short ROI cycles
- Transparency across all contracts
- Secure contract creation using templates
- Rapid implementation
- Multilingual functionality

Individual contracts at the touch of a button

- EMS employees register the device as a case in proCONTRACTS
- The software displays all relevant customer and device information
- Reviewed and pre-approved contract building blocks are available for the relevant service case
- Employees can select and fully configure the appropriate contracts

CASE STUDY: HEINEKEN GERMANY

1. Challenge

Brewery contracts between manufacturers and hospitality businesses are highly complex and involve a time-consuming process for field sales representatives.

HIGH LEVELS OF EFFORT FOR NEW CUSTOMER CONTRACTS

- Creating and signing the contract in an Excel file during the customer visit
- Exporting the contract as a PDF file
- Saving the PDF contract file in a SharePoint folder
- Sending an email containing information and a link to the new contract to the Regional Sales Manager (RSM)
- Reviewing and countersigning the contract
- Saving the contract locally
- Uploading the signed contract back to the SharePoint folder
- Sending an email with contract information and a link to the back-office team for the next steps

2. Solution

proCONTRACTS and proCONTRACTS | Beverage



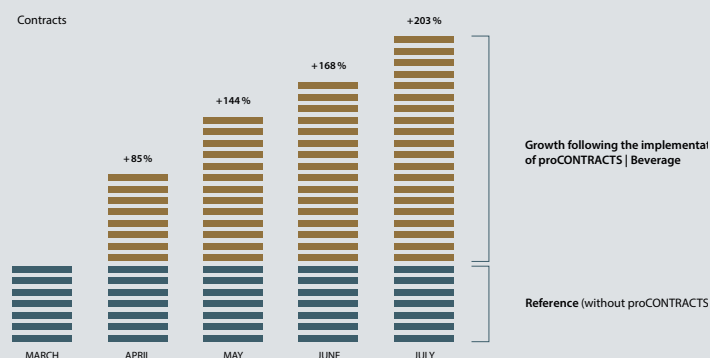
»I open proCONTRACTS, see everything I need, sign and click submit – and that's it. There are no more emails, no more artificial folder structures and no more local storage of documents. Everything is in one database. In addition, all processes – including communication – are automated.«

Philip Stern
Regional Sales Manager, Heineken®

3. Result

proCONTRACTS reduce and simplify the process to just three steps:

- Creating and signing the contract in the Beverage Canvas App directly at the customer's premises
- Sending the contract from the system to the Regional Sales Manager for review and approval
- Review, signature and approval by the RSM in the shortest possible time



In the four months following go-live, approximately 800 contracts were entered and processed using the proCONTRACTS contract management tool, with numbers continuing to rise.



Review contracts quickly
Identify risks early
Make informed decisions



AI Redlining

Compare contract versions faster and more accurately

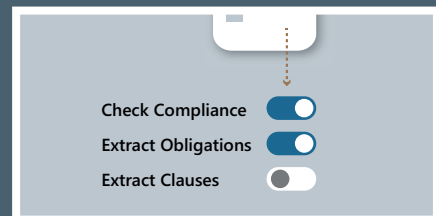
AI Augmentation

Always remain up to date and maintain a complete overview of all contract information.



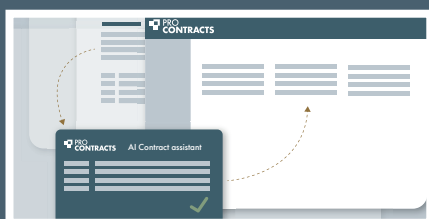
AI document comparison

Analyse and compare different document versions.



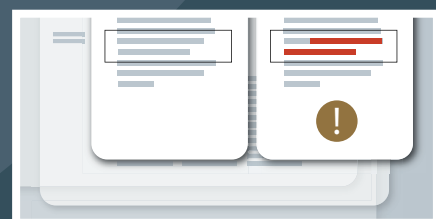
AI automated contract digitalization

A complete, end-to-end process without the need to create the contract in advance.



AI Import

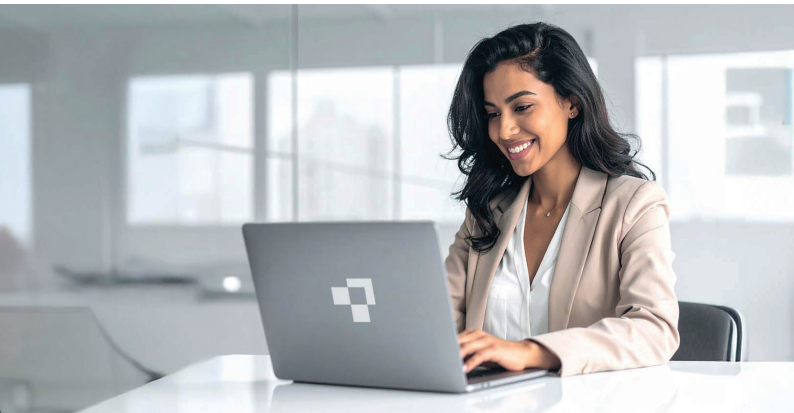
Easily import large volumes of legacy contracts into the CLM system.



AI Compliance Check

Automatically compare a contract against the company's applicable policies and guidelines.

INDUSTRY MODULES



Unique CLM functionality for specific industries

The intelligent application and contract management solution for the beverage industry

Seamlessly integrated into your CLM environment within Microsoft, this solution allows you to manage a wide range of business areas, including retail, beverage wholesalers, suppliers and end customers. AI enables you to identify risks immediately, avoid missing key dates and deadlines, and gain complete clarity across all processes and contracts.



Intelligent contract management for copyrighted content

With proCONTRACTS | Royalty, you can draft, negotiate and conclude contracts governing the use of copyrighted works or content. You also have an up-to-date overview of the royalties and other remuneration payable in return for the use of copyrighted content. These amounts may vary by work and are aggregated at contract level.



Property management made easy

proCONTRACTS | Real Estate makes managing rental properties, spaces, tenants and service providers straightforward. You always have a complete overview of all properties, vacant spaces, remaining lease terms, expiring leases and spaces that are becoming available. Contract costs can be calculated automatically based on the rental area and the assigned rental price per square metre.



Your complete solution for sustainable energy and photovoltaic projects

With proCONTRACTS | Energy, you can manage complex photovoltaic projects covering solar energy, green energy and sustainable energy, from planning and sales through to implementation. The project remains at the centre of the process, while all required documents, including quotations, contracts and product-related correspondence, are generated automatically by the system. A dedicated app supports on-site appointments and ensures that site inspections are carried out efficiently.

