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AI-Procurement Enablement Service - Service Definition Document

Version: 1.4

Lot: Cloud Support (Lot 3)

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1. Service Summary

Commercial Nexus (“CNX”) delivers an AI-procurement enablement framework that integrates Microsoft Copilot and Power Platform tools to automate sourcing, reporting, and contract management.

The service enhances decision-making, reduces manual workload, and improves supplier visibility thus enabling NHS organisations to achieve measurable efficiency, cost avoidance, and data-driven commercial control.

Service is designed to support DSPT-aligned deployment patterns. Data location is determined by the customer’s tenant configuration and Microsoft’s service terms; for NHS M365 this is typically UK-based.

2. Service Features

- Integrates Microsoft Copilot with procurement workflows for intelligent automation.

- Configures Power Platform tools to streamline procurement and contract management.
- Delivers AI-driven insights on suppliers, contracts, and sourcing performance.
- Automates contract renewal alerts, sourcing events, and approval workflows.
- Consolidates data from contract and finance systems seamlessly.
- Performs data analysis and cleansing to improve readiness for AI automation.
- Provides IG-compliant deployment architecture within the NHS Trust's Microsoft M365 environments.

3. Service Benefits

- Saves significant time by automating sourcing, drafting, and review processes.
- Simplifies daily operations and ensures faster, more consistent outcomes.
- Improves negotiation outcomes through better supplier intelligence and visibility.
- Enables data-led decision-making with instant, accurate procurement insights.
- Reduces missed renewals and enhances operational efficiency.
- Offers unified visibility across multiple systems for greater transparency.
- Supports financial planning and identifies savings opportunities early.
- Boosts productivity by simplifying complex data analysis and reporting.
- Automates document creation and queries from suppliers.

4. Scope of Service

This service supports NHS procurement, finance, and commercial teams seeking to:

- Implement AI and automation across sourcing and contract management processes.
- Integrate Microsoft Copilot and Power Platform within existing procurement tools.
- Enhance visibility across supplier networks and contract lifecycles.
- Build the foundations for AI-driven decision-making using real-time analytics.

5. Service Phases

Phase	Activities	Deliverables
Phase 1 – Discovery & Data Assessment (2-12 weeks)*	Review current procurement systems, data quality, and process mapping.	Data readiness report and AI implementation roadmap.
Phase 2 – Data Cleansing & Integration (2-12 weeks)*	Configuration support for data preparation, normalisation and formatting to enable automation within the Client's Microsoft environment.	A structured data model configured within the Client's M365 tenant to support automation and analytics.
Phase 3 – Automation & AI Enablement (2-12 weeks)*	Deploy Microsoft Copilot and Power Platform workflows for targeted use cases.	Live solution demonstrating measurable time and cost efficiencies.

*Duration is dependent on data completeness, cleansing volume, and underlying data quality.

All work is limited to configuration of Power Platform components.

Delivery duration varies by package tier selected (Lite/Standard/Full) as defined in the Pricing Schedule.

6. Information Governance and Security

- All data remains within the NHS Trust's Microsoft M365 tenant.
- No data is exported or processed outside UK sovereign boundaries.

- Compliant with GDPR & NHS DSPT.
- Access restricted to approved users with NHS-signed NDAs and confidentiality agreements.
- CNX does not extract, store, or process NHS data outside the Client's Microsoft M365 tenant. All processing occurs within the Client environment.
- The service does not create technology lock-in. All configurations remain in the Client's Microsoft M365 tenant and can be modified or maintained independently of CNX.

7. Backup, Restore & Disaster Recovery

i. Backup & Restore

CNX does not host any Client data. All data used by the AI-Procurement Enablement service remains within the Client's Microsoft M365 environment. Backup, restore, and business continuity capabilities are provided by Microsoft in accordance with their platform SLA.

The Client is responsible for:

- Microsoft M365 tenant-level backup policies.
- Retention rules for SharePoint, Dataverse, and Exchange.
- Data recovery processes applied within their environment.

ii. Disaster Recovery

As all data and workflows reside in the Client's Microsoft M365 tenant, DR planning falls under the Client's Microsoft M365 configuration and local business continuity arrangements. CNX will support restoration of configuration components (e.g. flows, apps) where required.

8. Hosting & Data Location

CNX does not provide hosting services.

All data, automations, Power Apps, and AI components created under this service are deployed within the Client's Microsoft M365 tenant.

Microsoft hosts all the NHS Trust's Microsoft M365 data exclusively within UK sovereign datacentres.

No data is transferred outside the UK. CNX does not extract, store, or host any data externally.

9. Availability & Outage / Maintenance Management

i. Availability

Power Platform, Microsoft Copilot, Dataverse and related services are subject to Microsoft's published service-level availability targets (typically 99.9%). CNX is not responsible for Microsoft platform uptime.

CNX does not provide platform-level availability guarantees or service credits, as hosting and platform resilience are fully managed by Microsoft.

ii. Outage & Incident Management

CNX will notify the Client of any configuration work that may impact app availability. Microsoft publishes all service health updates via the Microsoft M365 Admin Centre, which remains the authoritative source of system status.

Platform uptime is solely governed by Microsoft's SLA.

iii. Maintenance

Routine optimisation or update work by CNX will be scheduled during standard business hours unless agreed otherwise.

CNX does not perform any maintenance that causes downtime without Client approval.

10. Technical Requirements

- Access to the organisation's Microsoft M365 environment.
- Existing or planned Microsoft Copilot and Power Platform licenses.
- Availability of data sources (e.g. Atamis, AdviselInc, Oracle, SharePoint etc.).
- Basic system integration capability (data export).
- CNX designs Power Platform interfaces using Microsoft tools and components. Accessibility features are provided through Microsoft Power Apps' native capabilities.

11. Constraints

- Requires local stakeholder engagement before data access.
- Dependent on available and accurate procurement/contract/finance data.
- Excludes hosting or license resale - Client must hold Microsoft licenses.
- Limited to integration with systems that support API or data export.
- Data cleansing may be required before automation configuration.
- Microsoft Copilot configuration is provided only where the Client holds appropriate Microsoft licenses.
- Buyers must ensure appropriate licensing, access permissions, SME availability and data provision required to configure the service.
- Any new features, additional automation, or system integrations beyond the agreed scope will require separate commercial approval.

12. Exclusions

- CNX does not provide managed hosting.
- CNX does not guarantee integrations where APIs are restricted by the vendor.
- CNX does not modify third-party systems.
- No bespoke application development beyond scope.
- CNX does not provide or resell licenses.

13. On-boarding and Off-boarding

i. On-boarding:

- Initial kick-off meeting and technical review.
- Secure access setup under NHS controls.
- Joint configuration planning and knowledge transfer workshops.
- All access provisioning is controlled by the Client at all times.

ii. Off-boarding:

- Knowledge handover and documentation.
- Removal of system access credentials.
- Optional post-project support agreement.

Off-boarding activities are provided at the fixed-priced rates listed in the pricing schedule, with no additional exit fees.

Upon exit, the Client retains full ownership of all data, workflows, apps, dashboards, and AI configuration deployed in their Microsoft M365 tenant.

CNX will:

- Remove all user access.
- Provide a handover pack describing configurations.
- Confirm that no data has been exported or retained.

All Power Apps, Microsoft Copilot workflows, Dataverse tables, audit logs, and automation logic remain inside the Client tenant and under their control.

14. Service Management (Optional)

- Managed by the CNX delivery team.
- Regular project progress reporting and milestone reviews.
- Managed service available post-deployment for monitoring and updates.

15. Termination Terms

- Termination is governed by the G-Cloud 15 Call-Off Contract ("Call-Off Contract") terms. Any additional supplier terms apply only where not in conflict with the Framework.
- All deliverables to date provided upon termination.
- CNX will support a smooth and documented transition in accordance with the Call-Off Contract.

16. Contact

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