



 **DynaTech** | Systems

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Accelerate Business

About DynaTech

# Unified Purpose, Shared Journey

DynaTech Systems stands out as a comprehensive and flexible solution for businesses looking to leverage technology to drive growth and innovation.

As thought leaders in digital transformation, we deliver cutting-edge solutions and industry best practices. From consulting and proof of concept to end-to-end implementation and custom solutions, our expertise ensures your success.



**150+**

Projects

**100+**

Happy Clients

**350+**

Expert Minds

What Sets Us Apart

# DynaTech's Competitive Advantage



Global Work Experience  
(USA, Europe, Asia) for  
seamless rollouts



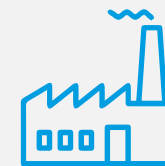
Successful Deployment  
of 150+ Microsoft  
Dynamics Projects



A single-stop shop for  
all of Microsoft's  
Business Applications



In-house QA Teams to  
ensure Information and  
Data Security



Empowering businesses in  
Manufacturing, Retail,  
Education, and more



Strategic Approach  
Resulting in Quick  
Turnaround & Solutioning

# Microsoft Cloud Capabilities



## Microsoft Azure



Azure Infra



Azure Services



Azure Fabric for BI



Logic Apps



Service Bus



Functions



Event Grid



API Management



Synapse Analytics



Data Lake



Data Factory



Load Testing



## Microsoft Dynamics 365



Marketing



Sales



Finance



Supply Chain Management



Commerce



Customer Service



Field Service



Project Operations



Human Resources



Customer Insights



Finance & SCM



Copilot



## Power Platform



Power Pages



Power BI



Power Apps



Power Automate



Copilot Studio



Dataverse



AI Builder

# Dynamics 365 Success Stories

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## An Accountancy Association

A Leading accounting institute, taking a lead role in shaping, influencing, and advancing the highest standards of ethics, education, and professional excellence in delivering top-tier accountancy skills.

Industry

Education, Association

Workforce

200+



## Solutions

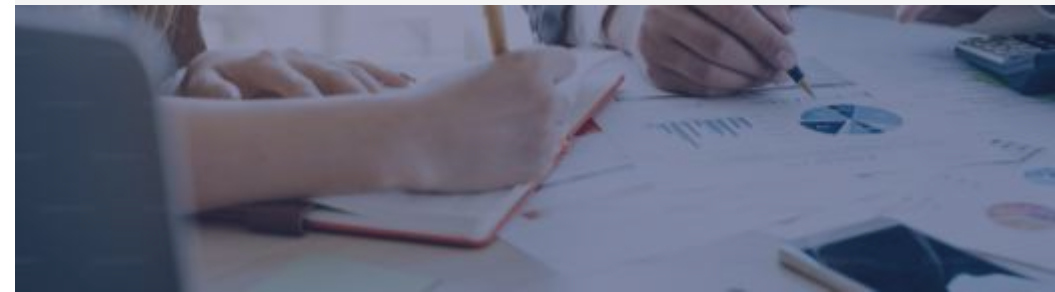
- **D365 CE & Power Pages Integration:** Unified member management and customer-facing portals, reducing the need for custom APIs.
- **Migration to Dynamics 365 F&SCM:** Successfully migrated GP data for six legal entities into D365 F&SCM within a year, ensuring no data loss.
- **Invoicing Automation:** Reduced the invoicing process for 60,000 members from 2 weeks to just 8 hours.
- **Improved Data Synchronization with Azure Synapse:** Enabled seamless data flow between various systems, improving overall efficiency and accuracy in data reporting and management.

## Benefits

- Significant reduction in invoicing time improved operational efficiency and freed up IT resources.
- Reduced costs through the consolidation of customer-facing portals and systems.
- Enhanced reporting and real-time insights through Power BI integration.
- Leveraged Copilot Studio to automate routine tasks.

## Products/Services

- D365 Sales
- D365 Customer Service
- D365 Customer Insights (Marketing)
- Power Pages
- D365 F&SCM
- Azure DevOps
- Azure Synapses
- Power BI
- Copilot Studio
- Fabric
- Upgrade from GP
- Membership Information Management
- Managed Services
- E-commerce connector
- Payment Gateway Connector
- Not for Profit tool
- BI for D365
- D365 CE
- Testing Automation





Benefits Outcomes

### Unified Power Pages Portal

- Converted their 10 different customer facing portal to single Power Pages Portal
- Built on Power Pages for streamlined experiences
- Consistent login, sign-ups, and processes for all users
- Enhanced operational efficiency and Handling more than 200K Customer Traffic Monthly.
- Unified platform for stakeholders
- Use of standard out of the box no cost integration web APIs to bring down integration cost.

### Enhanced Financial Experience with real time integration between D365 CE and D365 F&O

- Removed dependency on on-premises software (GP) and migrated to cloud platform (D365 F&O) for better system performance, accessibility, and Features.
- Automated Electronic Fund Transfer Payment and Credit Card Payment allocation to Invoices with real time integration and posting in Finance and Operation.
- Automated Monthly statements to customers for their transactions.

### The single view of a member

This will allow organization to easily track members compliance to applicable policies and regulation thereby reducing non-compliance

### Increased member satisfaction due to personalized communication

- More organized work processes for employees because of a centralized content repository from all departments,
- More control over content published will result in efficient way of promoting and selling intellectual capital (P) which will increase revenue

### Improved decision making

This will be due to logically organized data and information. More efficient processes enabled through the new system will reduce wastages in processing time, and allow for better quality reports and dashboards for more frequent monitoring

### Streamlined business process

- This will allow for a quicker approval process and less time spent on executing tasks. Transaction details will be populated at the time of request therefore saving processing time
- Request will not be submitted without the correct documents therefore saving correspondence time and allowing for better audit trail for request
- Process will be automated instead of manual and will therefore save time in pulling various reports and filtering for required data

### Increased stakeholder satisfaction

- This will be through the elimination of hard copy forms and the introduction of an online application process.
- System generated reports will ensure the accuracy of data extracts and will reduce the time it takes to make submissions and SAQA and other Statutory bodies.



Tools

#### D365 Sales

D365 Customer Service

D365 Customer Insights (Marketing)

#### D365 Finance & Operations

Covered Modules - Accounts Payable, Account Receivable, Cash & Bank Management, Fixed Assets, Budget, General ledger, Assets Management, Expense Management, Taxation, Human Resource

#### Power Pages

Migration of multiple business website to single power pages portal for Students, Members, Vendors, etc.

Bi-directional Integration with on-premise Software's (IMIS)

Integration of F&O with Bank for payment automation of vendors

Azure DevOps

Azure Synapses

Canvas App for end user for Asset Management

Power Pages Mobile App in Android and Apple Play Store

Chat Bot on Portal and Omnichannel for Customer Service Agent



Business Drivers

#### Membership

The entire gamut of features within the project enables members and staff to manage whole membership lifecycle from registration, evaluation, membership allocation, termination, renewal, support, annual invoices, penalties, disciplinary actions, compliance, etc

#### Finance CE

Finance CE: Store all the payments into CE processed via bank Or Credit cards through power pages portal & autoallocate against the posted invoices.

#### Finance F&O

Accounts Payable & Accounts Receivables modules for all Purchase / Sales order, Invoices, payments and reports for vendors and customers.

#### Exam

In the CE system, the process involves scheduling and enrolling students through the portal, checking them in using QR codes at the venue, marking their exams within the system, and subsequently sending dynamic result letters to the students.

#### TCMS

TCMS (Training Contract Management System) supports the enablement of Trainees on their Training programme which is a key component in the full qualification model towards the CA(SA) or AGA(SA) designation.

TCMS (Training Contract Management System) assists Training Officers, Administrators and Trainees in managing training contracts in the Training Office

It also supports the function of accreditation of training providers by this company.

#### EAT

EAT (Electronic Assessment Tool) is a system to manage the performance of trainees on a contract. It enables the trainees to create assessments and the training officers to review, evaluate the assessments and finalize them for grading.

#### Marketing

The Integrated Marketing Communication (IMC) ticketing system facilitates request submissions, enabling requestors to outline their requirements. It features a Reporting Dashboard for managers to track progress and a Brand Digital Bank Repository for centralized access to digital assets.

#### Events & Seminars

The project is enable users to book an event via portal, with gamute of features like group booking, bulk booking, self booking, waiting list, attendee report, attendee certificate, cancellation of booking, auto-blocking calendar, QR Code Check-in, etc

#### Legal-Disciplinary Management

This project enables users to log a complaint against any user who misuses their designated post & referred to the courts for the further judicial procedure.

#### Education

Education module supports the function of accreditation of academic & professional programmes provided by educational institutes across South Africa.

Completion of accredited programmes by trainees is a key enabler for the full qualification model towards the CA(SA) or AGA(SA) designation.

#### Customer service (Omni-Channel-Chatbot)

Chatbot is an AI program designed for conversation with members to help with their queries.

#### Customer Voice

Customer Voice module helps different functions within organization to create & conduct personalized surveys in order to gain information and critical insights from their members

#### Thuthuka Bursury Fund (Non-Profit)

This module supports the commercial function to manage Sponsors & Advertisers.

#### Asset Management

Basic Features such as :Maintenance of assets, Tracking assets conditions, keeping track of responsible person and location of such assets.

#### Sponsorship & Advertisement Procurement

This module supports the commercial function of organization to manage Sponsors & Advertisers.

#### Member Declaration (CPD, TP, BRP)

Member Declaration is the process where it allows there members to submit the declaration, upload evidences and based on response they can be selected for monitoring process.

There are three types in member declaration:-

- CPD :- Continuous professional development.
- TP :- Tax Practitioner.
- BRP :- Business rescue practitioner.

#### Contract Management

Contract management system streamlines the Contract Process reducing the time and effort required for manual Approvals and Signatures. This can accelerate the contract lifecycle, improving efficiency in contract management.

#### Mobile App

Power Pages Portal Android and iOS app, built using PWAs (Progressive web app), brings together the flexibility of web and the performance of native apps. Enjoy seamless compatibility across platforms, native app-like experience, and convenient installation options from Play Store or the App Store, all while accessing the portal as if it were an app itself.



### Membership

Accounts, Contacts (Members), Invoices, Products, Membership Applications, On-Premise Software (IMIS)

### Finance

Payments, Bank Statements  
Purchase Orders

### Exam

Students Details, Results

### TCMS

Trainees, Training  
Offices and Traininf Officer

### Legal-Disciplinary Management

Cases

### Education

Universities

### Contract Management

Contracts

### Membership

- Issue of Replacement Certificate
- Monthly Financial Statements
- Power BI Reports based on three on-premise/cloud datasource
- Termination of Membership
- Concession (Discount) Application
- New Member/Reinstatement Application
- Auto Invoicing for New/Reinstatement Application
- Annual Subscripition Invoice Generation
- Companies Application Registration
- Query Submission through Portal and Resolution via Case Management
- Annual Auto Penalty Invoice Generation
- Register a Practice with the oraganisation.
- Register Tax Practitioner/Deregister Tax Practitioner with the Organisation
- Auto Issue of Letters via Portal
- Call Campaign Management
- Manage membership including generating letters of good standing, affidavits, and membership letters.
- Member Compliance

### Finance Functionality CE

- Receipt of EFT (Electronic Fund Transfer) Payments via bank.
- Real Time Integration of D365 with PayU (Credit Card Payment Gateway)
- Advance payment settlement for the prepayments.
- Receipts generation of the each payments made.
- Write off remaining amount on the invoice & payments.
- Raise Invoice & autopost into FO.
- Create payment arrangements for the invoices if member can't pay in one go.
- Adjust accounts if the member charged inccorectly for an invoice.
- Process refunds if member ask for the refund for the payment made.
- OCR (optical character reader) for the receipts of EFT (Electronic fund transfer) payments.
- Power BI reports for the payments to get overall view.
- Real Time Bi-Directional Intgeration with F&O through Dual Write

### Finance Functionality F&O

- Budget Control and Budget planning as per organization requirement
- Cash & Bank for maintaining cash and bank balances supported by reconciliation.
- Expense management for recording expenses and tracking all expenses at one glance.
- Fixed asset module for maintaining asset records and apportionment of proper depreciation at specific intervals
- General ledger entries and Financial reports like Trail balance, Profit and loss statement, Balance sheet, cash flow statement and other financial reports
- Human resource and payroll module for all payroll related task.
- Cost accounting and warehouse modules for effective management of Inventories

### Exam

By using the power pages functionality , appointing the invigilators and markers for exam  
Automate the functionality of creating invoices once student registered



### TCMS

- Send invitation to potential trainees to register new training contracts on the system
- Register new contracts & manage existing contracts
- Bulk invoicing to generate invoices for new registrations and payments
- Reports & Dashboards

### EAT

- User management from Power Apps Portal.
- Create & manage assessments
- Review, evaluate the assessments

### Marketing

- Ticketing System for Internal brief
- Dashboard/Reports
- Brand digital bank / Repository
- Customer Segmentation
- Email Marketing
- Customer Journey
- Social Media Marketing
- Integration with Dynamics 365 CRM

### Events & Seminars

- Event Custom Registration Field
- Booking Cancellation
- Pass Configuration
- ICalendar – Blocking a slot in member's calendar
- Attendance Report and Certificate
- Coupon Code
- Transferring Booking to another Member
- Series of Events
- Bulk Booking of an event
- Event Check-ins through QR Code
- Custome Registration Questions & Responses
- Event Bookmarking and multi filtering, sorting & searching
- Intergration with LMS(Learning Management System)

- Intergration with Zoom(Online Session Broadcaster)
- Intergration with Vimeo(Online session Broadcaster)
- Bill to Company for employees
- Waiting List for put members on queue for event
- Sponsors and Speakers
- Tracking Hours of attended events
- Group Booking and Self Booking Functionality
- Flexibility in increasing/Decreasing capacity of an Event
- Integration with third party event hosting government entity
- Auto Invoice generationon booking an event
- Employer Booking an Event for its employees

### Legal-Disciplinary Management

- Complaint & case creation through website & memberportal.
- Case referred to Professional conduct Committee (PCC) to perform the court process.
- Case referred to Disciplinary Committee (DC) to perform the court process.

### Education

- Create new accreditation requests
- Manage & monitor existing providers
- Review & grading of existing providers

### Customer Voice

- Create and manage personalized surveys
- Manage multiple triggers to send survey to customers
- Reports and Visual Insights

### Customer service

#### (Omni-Channel-Chatbot)

- Generate Letter of Membership
- Generate Letter of Good Standing
- Generate existing Invoices
- Generate Monthly statement
- Help with any other queries related to this org
- Route request to case if unable to generate letters, invoices or statements.
- Realtime conversation with customer service representative through chatbot.
- Route users to power pages for more information.

### Thuthuka Bursury Fund (Non- Profit)

- Submit new application to apply for fund by students
- Review & Manage student applications
- Approve and e-sign the contract
- Donor Management
- Monitor Student Progress
- Student Placement

### Sponsorship & Advertisement Procurement

- Create and manage leads. Client calling list as leads. Manage & track activity.
- Create & manage opportunities. Convert leads to opportunities. Manage & track activity.
- Propose solution to prospective clients. Identify seminar/events/advertising options for clients as per budget.
- Finalize proposal & E-sign customer contracts
- Reports & Dashboard

### Asset Management

- Physical Asset verification by using QR code at specific intervals using mobile app and web page
- Tracking logs for particular assets information and condition at one glance





#### Processes

#### Member Declaration (CPD, TP, BRP)

- Declaration Submission Process.
- Unlock Declaration.
- Evidence Upload.
- Schedule monitoring process.
- Automatic Email Configurations.

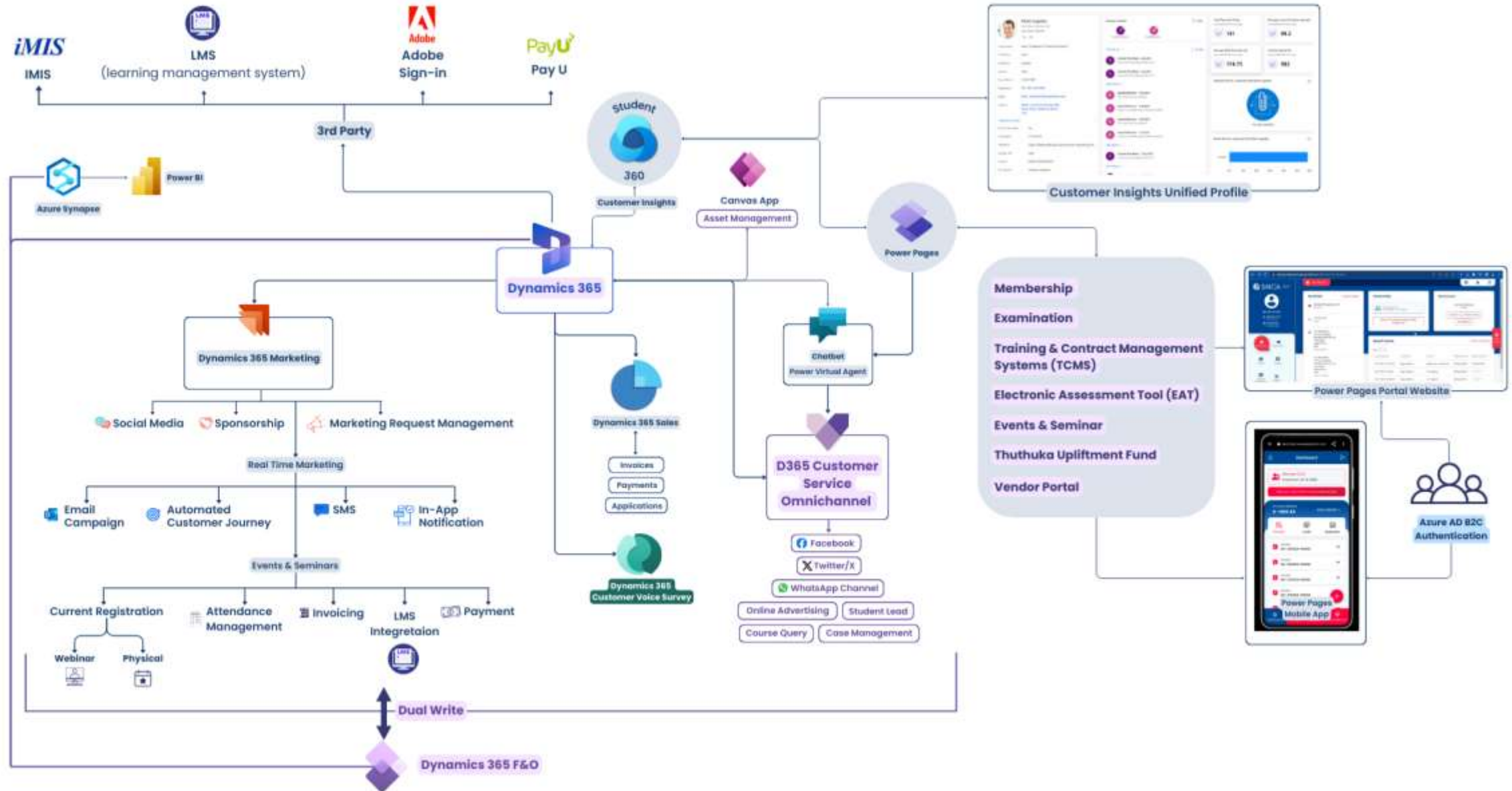
#### Contract Management

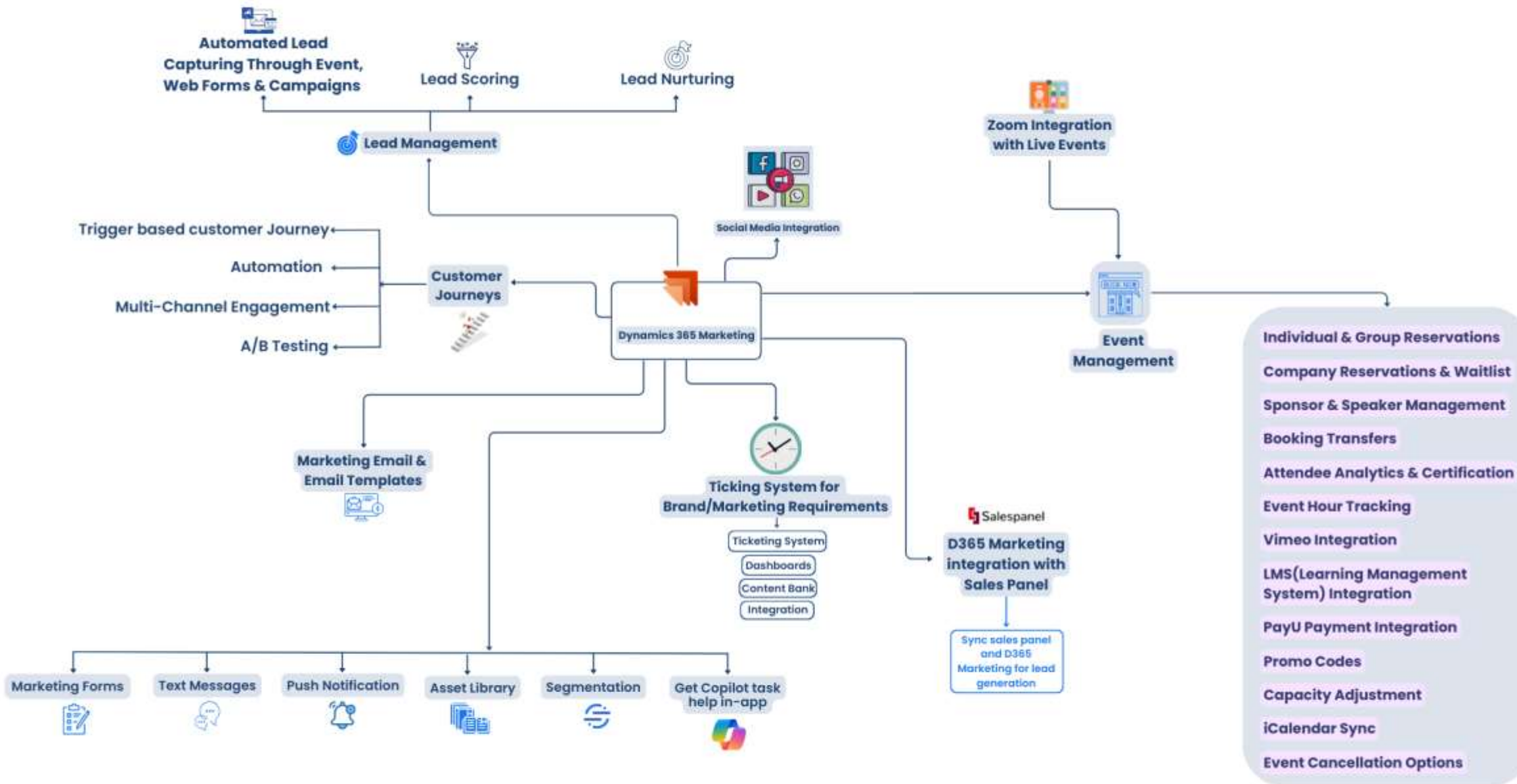
- Contract Request Initiation Process
- Contract Request Approval Process
- Contract Drafting Process
- Contract Review & Approval Process
- Contract Risk Management & Risk Registration
- Multi Level Approval / Escalation & Delegation of Authority on Contract Signing
- Contract E-Signing Process
- Contract Performance Monitoring
- Contract Renewal and Amendment
- Contract Termination
- Reporting Contract Breach- Case Management

#### Mobile App

- It includes all features of Power pages Portal
- Our Communities Channel - Discussion Forums
- Sponsor Exposure- Sponsor Listings
- Event Management - Event Calendar, Registration and Ticketing, Event Updates
- Content Sharing - Library and Resources, Content Creation, Knowledge Base
- News & Articles
- Data and Analytics - Poll



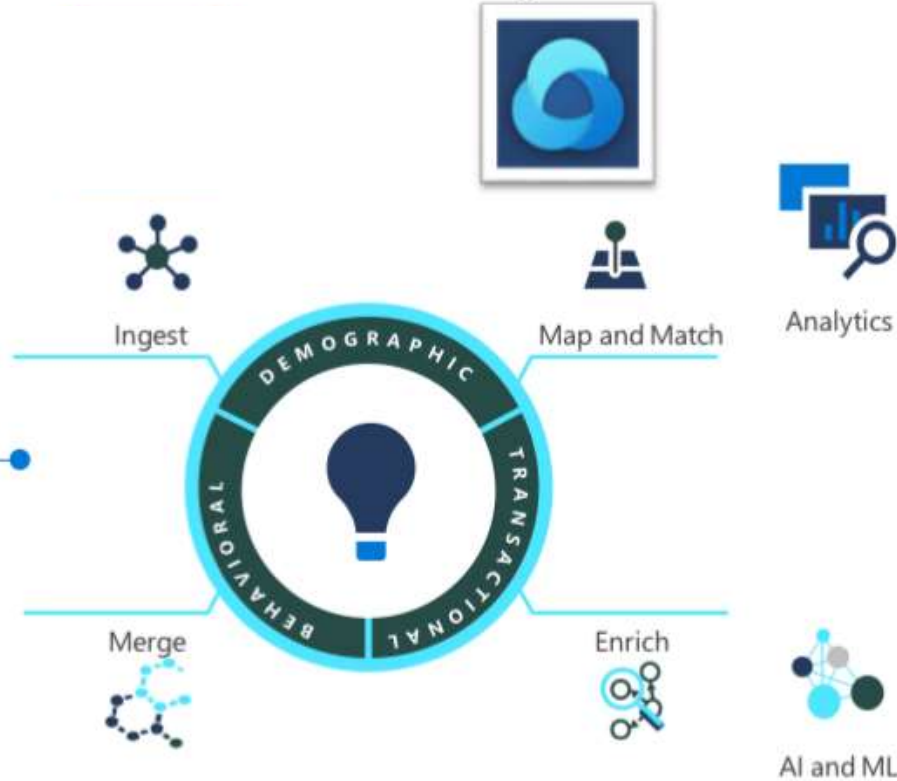




### D365 Customer Insights

Internal	External
Contacts	Course data
POS	Events
Cases	Loyalty
Campaigns	Geo
Web	WIFI
Email	Social
Mobile	
Surveys	
Usage	

CONNECTORS



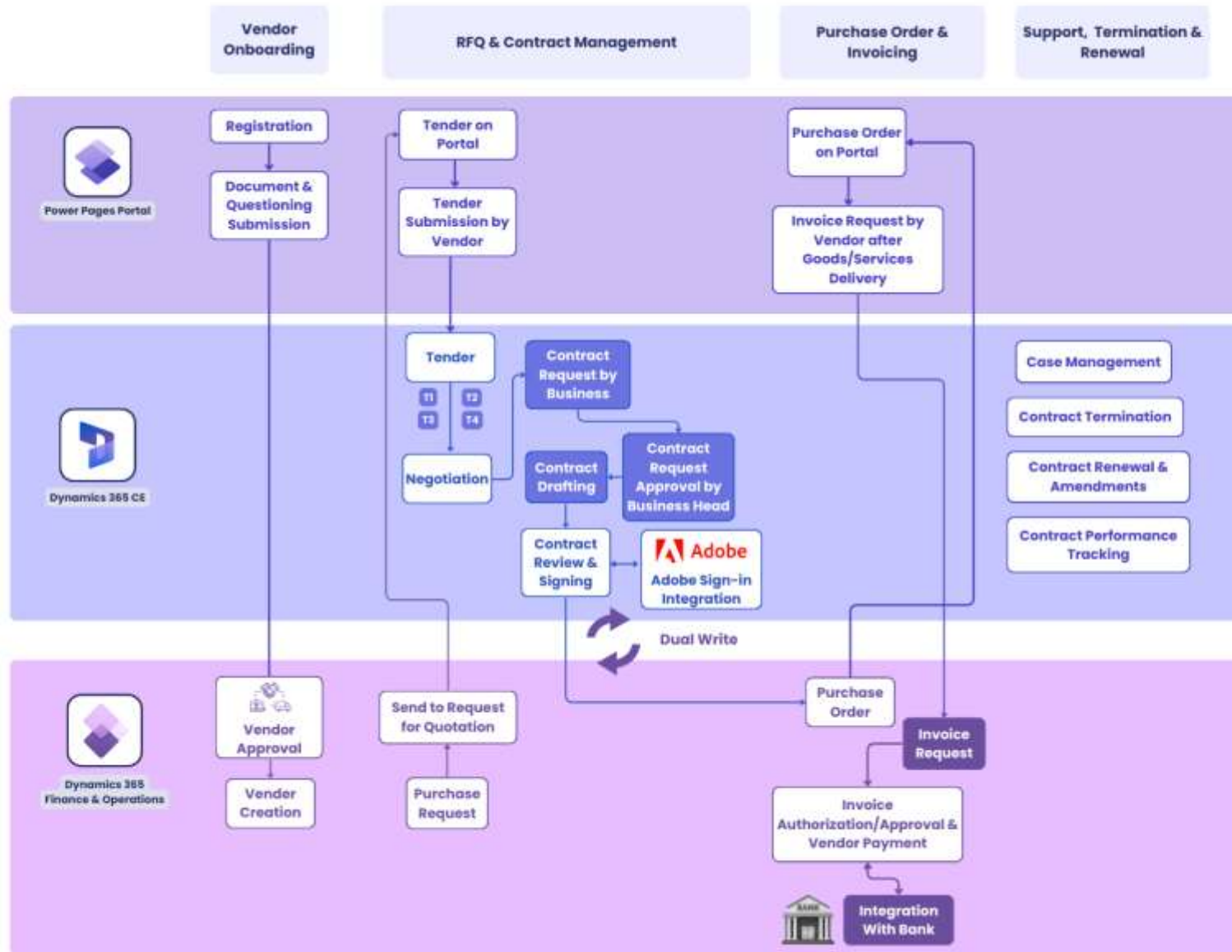
**Systems of engagement**

- Power BI
- Power Automate
- PowerApps
- Microsoft Dynamics 365
- 3rd Party integration

**Channels of engagement**

- Mobile
- Web
- Social
- Bots
- In-person

DATA    UNIFICATION    INSIGHTS    ACTION



## An Interior Design and Curation Company

It specializes in the design and curation of interiors for various industries, including hospitality, education, healthcare, retail, etc.

Industry

Wholesale Building Materials

Workforce

1000+



### Solutions

- **Excel Template Integration & Product Management:** Integrated legacy Excel templates with D365 CE Quote lines to streamline product creation.
- **Quote Margin & Approval Engines:** Developed a Quote Margin Calculation Engine for assigning cost responsibility and a Conditional Quote Approval Engine in D365 CE and D365 F&SCM.
- **Business Process Flow & Validations:** Defined business rules for various order types, with a business process flow in D365 F&SCM to enforce compliance and trigger finance approval notifications for customer and order validation.
- **Dual-write Integration & Security:** Engineered custom Dual-write integration between D365 CE and D365 F&SCM for over 35 data entities and implemented role-based security across D365 Customer Service and D365 Field Service for tailored data access.

### Benefits

- Minimized manual work and reduction in product creation lead time from a week to minutes.
- Easy management of multi-currency vendors and customers.
- Implemented record-level security roles for over 200 business units with a hierarchical structure.

### Products/Services

- D365 F&SCM
- D365 CE
- Dual Write
- D365 Sales
- D365 Field Service
- D365 Customer Service
- Fabric
- Managed Services
- CPQ
- SecureD365
- SAP Integration





**Security Roles**  
200+ Business Unit record level security configuration based on reps. Reporting hierarchy.

**Various Sales Orders**  
System driven controls to manage process compliance during Order intake.

**Customer 360 analysis**  
Complete visibility of customer open pipeline, Orders and customer credit to help users for better deal management.

**Standardized Tax Integration**  
Implemented Avalara Tax API Engine for standardized tax calculation across all applications, maintaining consistency in value.

**Opportunity handling**  
Automated task assignment to stakeholders. Approval mechanism based on potential revenue.

**Centralise Quote process and approval**  
Inbuilt cost / margin Calculation helps system managed process and compliance. On the fly Product creation from Quote template reduced lead time from one week to few minutes.

**Project Management**  
Unified interface similar to Sales Order process to help ease of acceptance of system. Advance Payment and Control

**BI for Project analysis**

**Integration with Lead Generation tool**

**Auto Case Creation from Email of legacy ticket system.**

**Language translation from English to Arabic**



**360 view of process from one application solution.**  
Integrated entire business process into D365 cloud solution to have one place to manage.

**Control and compliance**  
Each transaction pass through approval process configured. An customer 360 view give and due diligence facility to sales team without waiting of any manual intervention.

**Real time reporting**  
real time analysis help business to take proactive decision towards to strategy and risk mitigation.

**System generated Tasks**  
Based on pre-defined configuration, system identify approval required and mandatory information required and create Tasks and get assigned to respective team member. This also integrated with outlook to ensure it notified to team.

**Digital Approval Workflow**  
Streamlined the manual product creation process, reducing lead time. Implemented Dynamic Project Quote Calculation. Enabled on-the-go product creation and cost calculation, incorporating multi-currency vendor prices.

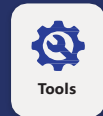
**Efficient Product Management**  
Streamlined the manual product creation process, reducing lead time. Implemented Dynamic Project Quote Calculation. Enabled on-the-go product creation and cost calculation, incorporating multi-currency vendor prices.

**Order Segregation and Validation**  
Defined validation and business rules for diverse order types, ensuring compliance and specific requirements. Configured a unified order screen for varied scenarios, including Retail Orders, Sample Orders, and Project Types.

**Streamlined Finance Operations**  
Implemented a Business Process Flow for defining and enforcing business rules and validations. Simplified the complex finance validation process, ensuring seamless order processing and customer onboarding.

**Seamless Integration and Data Mapping**  
Engineered Dual Write Integration for mapping between Customer Engagement (CE) and Finance and Operations (FO). Facilitated seamless integration of over 35 data entities, preventing duplicate data entries and ensuring data consistency.

**Data entries and ensuring data consistency**  
Role-Based Security Framework: Implemented hierarchical and role-based security roles for over 200 business units. Tailored security permissions, granting access based on the organizational hierarchy, Business Unit, and Sub Business Unit.



**D365 Sales**  
Lead Management  
Opportunity  
Quote  
Orders  
Invoices

**SSRS**  
Quotation report with Language translation

**D365 FinOps**  
An Accounting Solution with module including  
Project Management  
Sales and Marketing  
Advance Warehouse  
Inventory Management  
Procurement and Sourcing  
AR  
AP  
Fixed Assets  
Cash and Banks  
Credit Collections  
Zatka Integration for tax compliance

**Azure Function**  
To manage high volume processes and business logic built azure function. This help to calculate and import bulk quote line and margin calculation.

**Power BI**  
Project analysis reports e.g. Cost analysis, Project Financials, Budget Control

**CDS**  
An robust integration between CE and FinOps for 35 data entity integration on recurrence basis.

**Outlook App**  
Integrate tasks with D365 Sales App

**D365 Field service App**  
Work Orders  
Booking Management  
Service Agreements  
Schedule board  
Resource Skills and management



**Product Master**  
On the fly product creation from CE to FinOps.

**Customer Master**  
Customer data with Credit management synced with FinOps.

**Exchange Rate Master**  
Exchange rate integrated with FinOps master. And have facility to store history exchange rate on record.

**Opportunity**  
Group of activities required to perform get selected through specific to process type.

**Terms & Conditions**  
Set of pre-defined group of terms get selected automatic and help to mention T&C over sales quotation to customer.

**Payment Terms**  
Payment Terms synced with FinOps helps to ensure its compliance during process of sales.

**Approval Hierarchy Flow**  
A Dynamic Approval hierarchy based on transaction value and Business unit help to identify approval owner.

**Resource Calander**  
Field Service Technician schedule management.

**Quote Import Template**  
Business Unit specific Quote import templates. On the fly new product creation from the same template. Convert foreign vendor price to local price and update cost.



Processes

#### Lead Management

- Lead from Different Sources
- Variation order lead
- Conditional Lead Approval
- Lead for Tender Bidding
- Lead creation with Integration of BNC tool

#### Opportunity

- Various process flow for variety of Opportunity project scope.
- Customer Credit Check
- Customer 360 visibility for Open Transactions.
- Auto Task Allocation to required stakeholders.
- Process checklist through Business Process Flow.
- Advance Payment

#### Quote

- Import Excel template
- Auto Create Product from template
- Foreign currency cost calculation
- Cost Component and Margin Calculation engine
- Quote Approval
- Finance Due diligence and approval
- Terms and Condition Master tool
- Quote Financial Summary at glance
- Exchange rate integration and history
- Performa Invoice

#### Project

- Time and Material & Fixed price Project
- Various Project type
- Supply
- Supply and Installation
- Design, Supply and Installation
- Installation
- Variation Orders
- Milestone Setup
- Tax
- Advance Payment
- Invoices
- Auto Installation work order creation.

#### Project Management

- Milestone billing
- Material Billing
- Project Budget and Control
- Project Invoices

#### Orders

- Retails Orders
- Variation Orders
- Auto Invoices for Sample Orders
- Advance Payment Validation
- Order Discount
- English to Arabic Language Translation.

#### Field Service

- Work Order for Reactive Maintenance
- Service Agreement for Scheduled visit for preventive maintenance
- Auto Case Creation from Support ticket system
- Mobile app for Technician

#### Business Process Flow

Implemented dynamic guided business process indicators to assist representatives across 200 distinct business units in ensuring adherence to process checklists and compliance standards through the utilization of out-of-the-box Business Process Flow (BPF) functionalities, workflows, and conditions.

#### Security

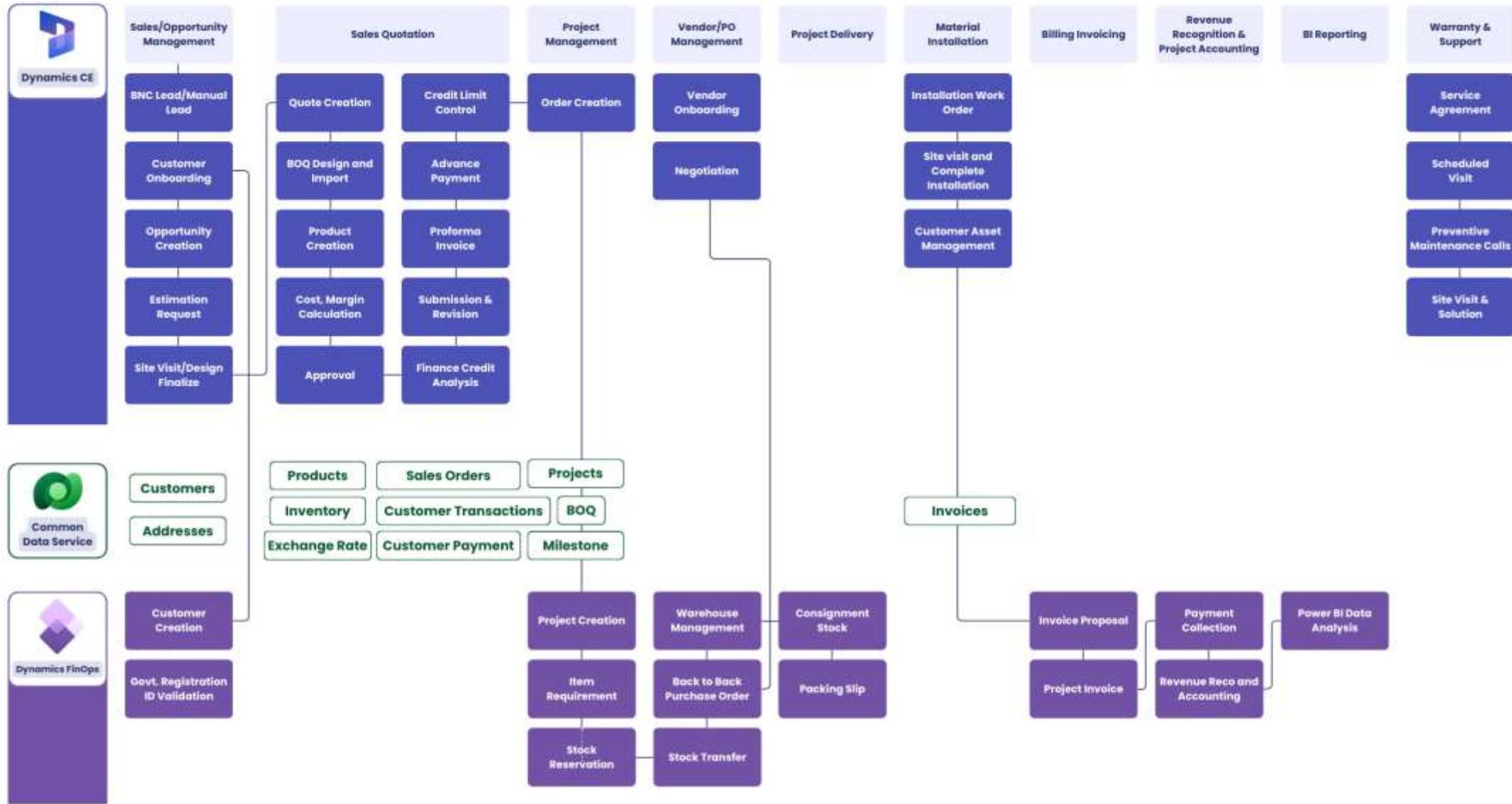
It has more then 200 Business unit across 6 Countries in Middle East. And Due to complex organizational hierarchy one person has diffent position and access in multiple Business Unit. We have made architecture of this complex security structure by using out of the box security configuration like Business Unit, Teams and Managerial Hierarchy.

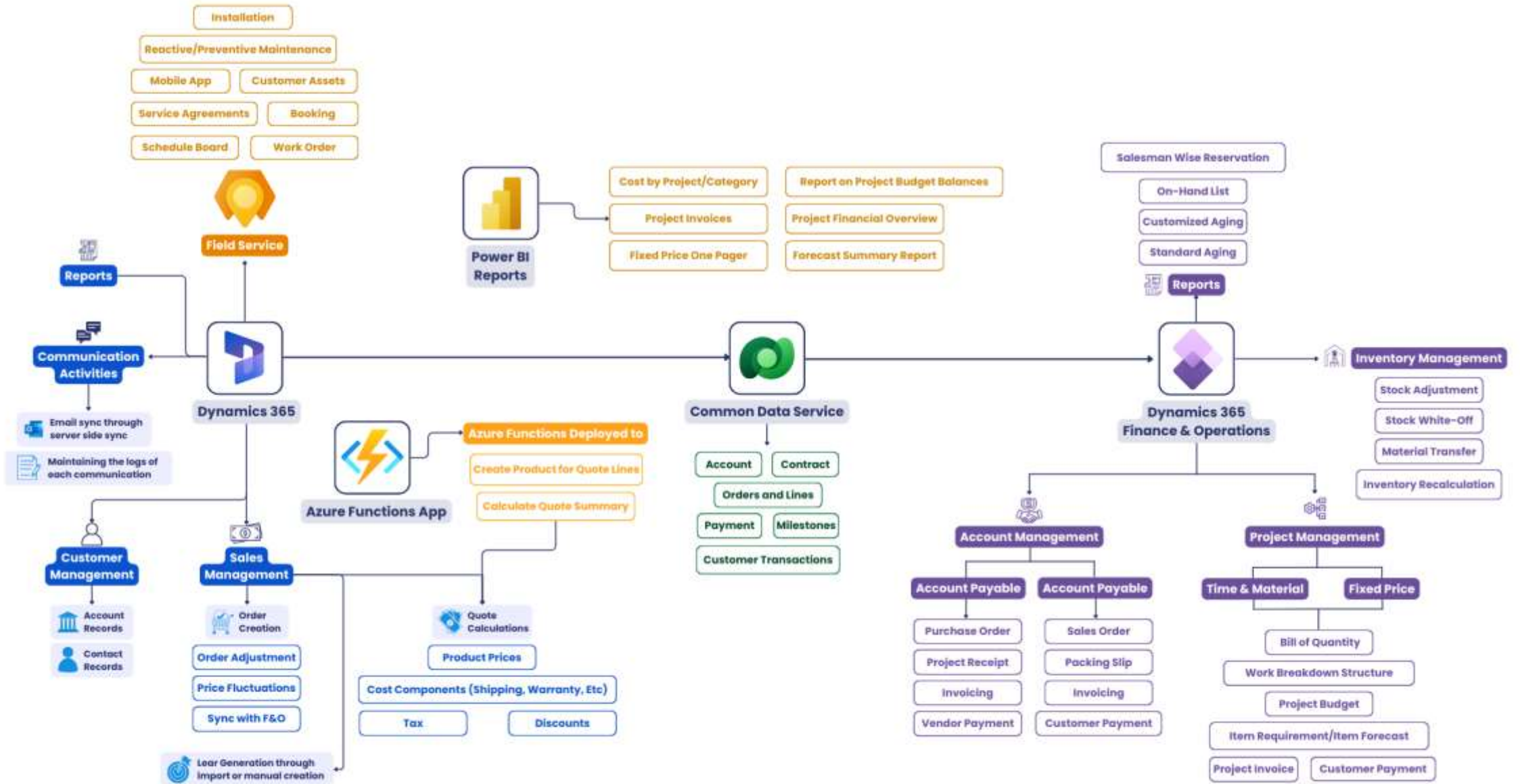
#### Modules

- D365 Sales
- Customer Credit Check
- Customer 360 visibility for Open Transactions.
- Auto Task Allocation to required stakeholders.
- Process checklist through Business Process Flow.
- Advance Payment









## Enhancing E-learning and Education with Dynamics 365

A premier educational content provider that offers a vast range of online courses with more than 11,000 hours of engaging courses.

Industry

E-learning and Education

Workforce

300+



### Solutions

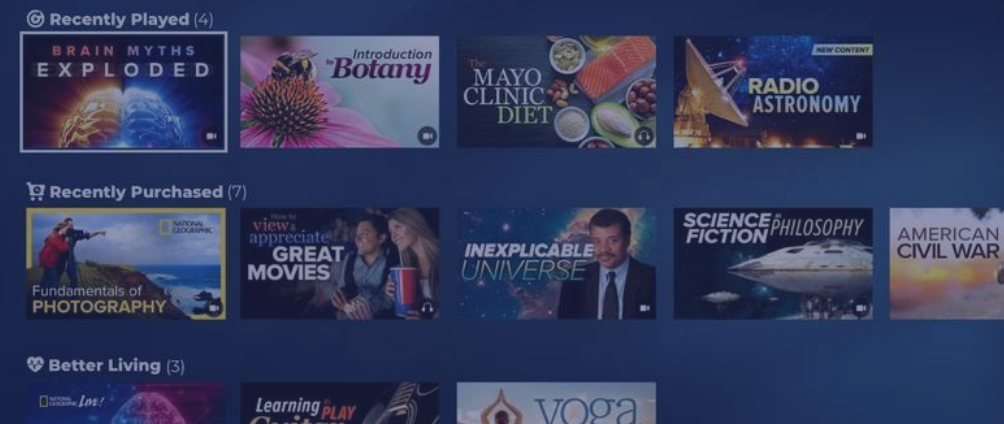
- **D365 SCM & 3PL Integration:** Streamlined production processes and outsourced warehousing, transportation, and order fulfillment services.
- **D365 Finance & D365 Sales Implementation:** Addressed financial planning, quote-to-cash, and cash management and managed the sales order lifecycle with D365 Sales.
- **Pricing & Payment Integration:** Developed a flexible pricing engine and integrated the WorldPay payment gateway across D365 CE, F&O, and E-Commerce.
- **Tax & Data Management:** Integrated Avalara Tax API across applications and handled high-volume data migration through Azure API Manager and over 50 APIs for E-Commerce.

### Benefits

- Efficient management of various pricing models with a developed pricing engine.
- Enhanced customer experience and sales promotion through discounting features.
- Minimized data migration costs and faster payment settlements.
- Accurate tax calculations and regulatory compliance.
- Timely identification and resolution of discrepancies and issues.

### Products/Services

- AX upgrade to Dynamics 365 CRM
- Customer service
- Dynamics 365 Finance and Supply Chain Management
- Power Platform
- Azure
- Fabric
- Managed Services
- Data Migration
- E-commerce Connector
- Payment Gateway Connector
- Shipping Connector
- Testing Automation



**Benefits**

- Optimized Pricing Structure**  
Implemented an advanced pricing engine with Mega Clone, Batch Job, Magento integration, and a Discount Module. It supports personalized and public pricing, enhancing price management efficiency.
- Efficient Large Data Migration**  
Streamlined migration of over 300GB data with a lifetime guarantee. Utilized selective migration for enhanced performance and cost efficiency.
- Handling High Volume Transactions**  
Introduced a Middleware Storage Hub to manage over 4500 daily orders during peak seasons, ensuring timely receipt and fulfillment.
- Standardized Tax Integration**  
Implemented Avalara Tax API Engine for standardized tax calculation across all applications, maintaining consistency in value.
- Seamless E-Commerce Integration**  
Efficiently integrated E-Commerce with 50+ APIs via Azure API Manager and set up a recurring batch for high-volume data integration.
- Effective Data Monitoring**  
Developed multiple reports using Business Intelligence (BI) tools for monitoring and facilitating data reconciliation between applications.
- Payment Gateway Integration**  
Implemented World Pay Payment Gateway across CE, FinOps, and E-Commerce, covering payment capture, settlement, refund, transaction voiding, and credit card management.
- Gift Certificate Feature**  
Designed a comprehensive Gift Certificate feature for both digital and physical certificates, with automatic balance creation, unique IDs, and multiple payment method integration.
- Order Type-specific Validation**  
Established validation and rules for various order types like Regular, Web, and Omni. Added features for creating referenced return orders, enabling partial/full returns, and avoiding duplicates.

**Tools**

- D365 Sales**  
Sales Order  
Return Order  
Product Pricing  
Invoices  
Payments
- Customer Service**  
Case Management  
Queues  
Routing Rule  
SLA  
Email Integration
- D365 FinOps**  
Sales and Marketing  
Procurement and Sourcing  
AR  
AP  
Cash and Bank
- Fixed Assets**  
Avalara Tax Connector  
Custom pricing module with facility to accommodate coupons and gift certificates.
- Dual Write**  
Integrated with 70+ Data entities
- Data Lake**  
Data export to data lake for business analysis.
- Azure**  
Azure API Manager to have monitoring performance of API  
Application Insight to monitor application performance health and logs
- Azure DevOps**  
Used to track project progress and timeline.
- Automation Testing**  
Utilised automation testing tool to ensure regression testing of business scenarios post deployment and on need basis.
- Avalara Integration**  
Seamless tax integration across the platform through API.
- QAS Address validation**  
Ensure Address accuracy before placing address to ensure minimal shipping error.
- WorldPay Payment Gateway**  
Credit Card Payment integration
- Hub (Middleware database)**  
A middleware database storage between CE and Website to ensure high availability of website to customer.
- Power BI**  
to provide analytical insight to customer care team.  
Monitor data integration health through BI Report.
- Data Migration**  
Use Kingswaysoft To Migrate the Historical data into the CE & FO

**Business Drivers**

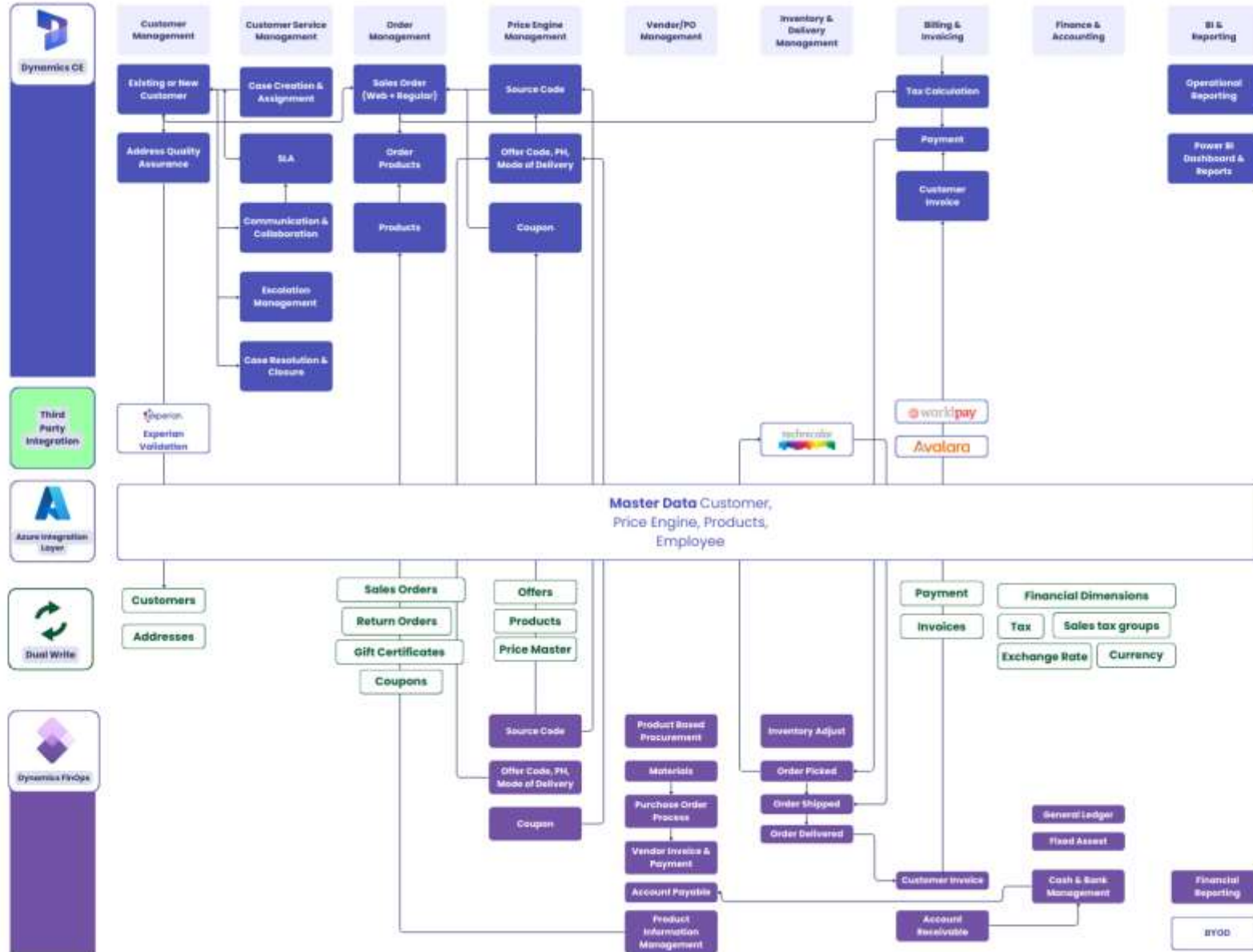
- Education - Never Stop Learning**  
Engaged customers to learn more about new course content by selling DVDs and Digital items to enrich and improve their lives. Access to content to anytime anywhere with any device.
- Life Time Warranty**  
TTC provide life time access of the digital course contents and return of products.
- Conversion rate of traffic to a website**  
To provide more offers and coupons with the efficient pricing of products to engage a customer to visit the website and learn the courses.
- Engaging Experts/Professors**  
To identify the new experts or professors to create quality of course content with background checks.  
content typically features University level experts and professors presenting in-depth learning across multiple lectures. Courses are developed by the experts and the Wondrium production team.
- The proportion of Royalty to Sales Revenue + Indirect Revenue (B2B)**  
distribution through third-party platforms like the Apple TV app, Audible, Amazon Prime, and Roku
- Gift Certificate and Gift orders**  
Automate of Gift certificate generation process and redemption by any customers  
Facilitate with the Gift Orders on any events.

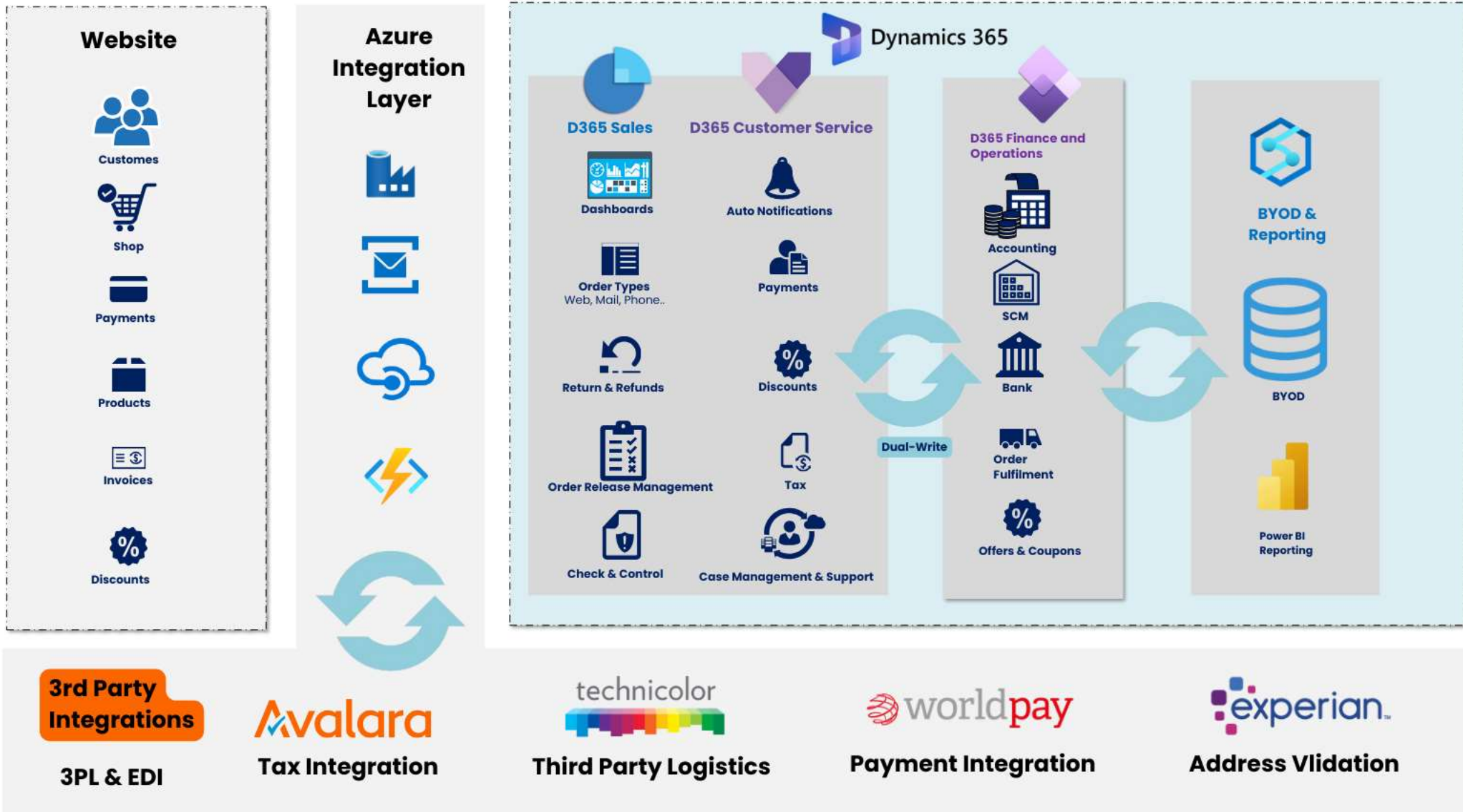
**Data**

- Products**  
To Migrate new or old different variety of course products  
OOTB entity + Migration + DW
- Price Engine Data**  
Offer + Catalog Codes  
Coupon  
Custom Entity + Migration + DW
- Gift Certificates**  
Migrate all the issued and redeemed data for the Customer's GC  
Custom Entity + Migration + DW
- Customers**  
All the Historical Data of Customers with their old Transaction  
OOTB Entity + Migration + New+ DW
- Sales Orders & Return Orders**  
All the Historical Customer Transactions related to Sales, return and replacement  
OOTB Entity + Migration + New + DW
- Address**  
Migrate all the customer addresses in the CE and flow to the FO  
OOTB Entity + Migration
- Financial Historical Transaction**  
For the collection of customer dues  
OOTB Entity + Migration + New
- Knowledge Articles**  
to provide a better solution to customer queries by the contact center team.  
OOTB Entity + Migration + New
- Product Master**  
Product Master  
Product price auto derive from configuration setup and auto update to pricing master.
- Price engine**  
Offer Master  
Price Master  
Copy price master  
Mega Clone  
Bulk Update

**Processes**

- Discount and Gift Cert**  
Threshold discount  
BOGO  
Flat Discount  
Gift Cert Sales and maintain balance accordingly.
- Sales Order**  
Types Of Sales Order  
Web Order  
Regular Order  
Mail Order  
Replacement Order  
Order Hold Status  
Return Order
- Payment**
  - Payment integration with CC gateway
  - Multiple payment to single order option
  - Partial Payment settlement
  - Payment with Gift Cert
  - Payment with Check
  - Refund Payment
  - Order Release Management
  - Order Hold Status
  - Order validation for Web Order
  - Omni upgrade Orders
- Customer Service**  
Auto Case creation from Email  
Case Routing and auto assign  
SLA
- Security**  
Security Roles configuration for Contact Center and Customer Care.
- 3PL**  
An recurrence schedule identify increment order records to share order details to 3PL partner via XML and the same received once shipping confirmed from 3PL team, and system recognize such orders to post Packing Slip and Invoice automatically through Batch.
- Tax & Address Validation**  
API for Avalara Tax and Address Validation built and utilised across the application platform i.e. Web and Dynamics to One API end point.  
This mechanism helps to ensure No data mismatch between applications.





## A Critical Care Nursing Organization

The largest specialty nursing organization in the world, representing the interests of more than 500,000 nurses who are charged with the responsibility of caring for acutely and critically ill patients.

Industry

Healthcare

Workforce

10,000+



DynaTech | Systems

### Solutions

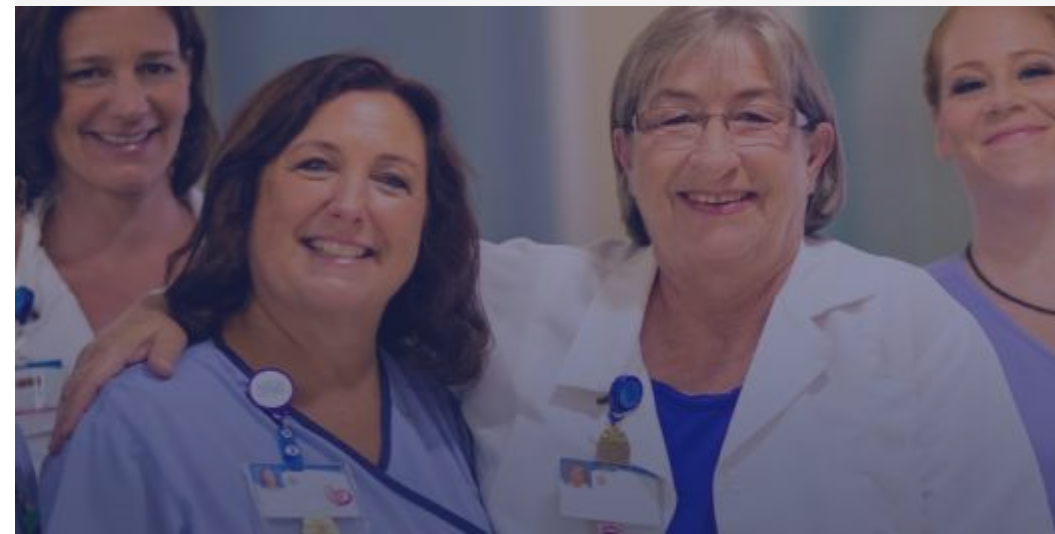
- **Implementation of Dynamics 365 Power Pages:** Created a flexible survey platform that allows customization to meet diverse business needs.
- **D365 CE Integration:** Enhanced customer engagement through streamlined communication channels, enabling effective collaboration and feedback collection.
- **Automated Processes with Power Automate:** Streamlined workflows and automated survey distribution and data collection processes.
- **Azure API and SQL for Data Management:** Utilized Azure API and SQL for seamless data integration and management, ensuring reliable data access and storage for analysis.

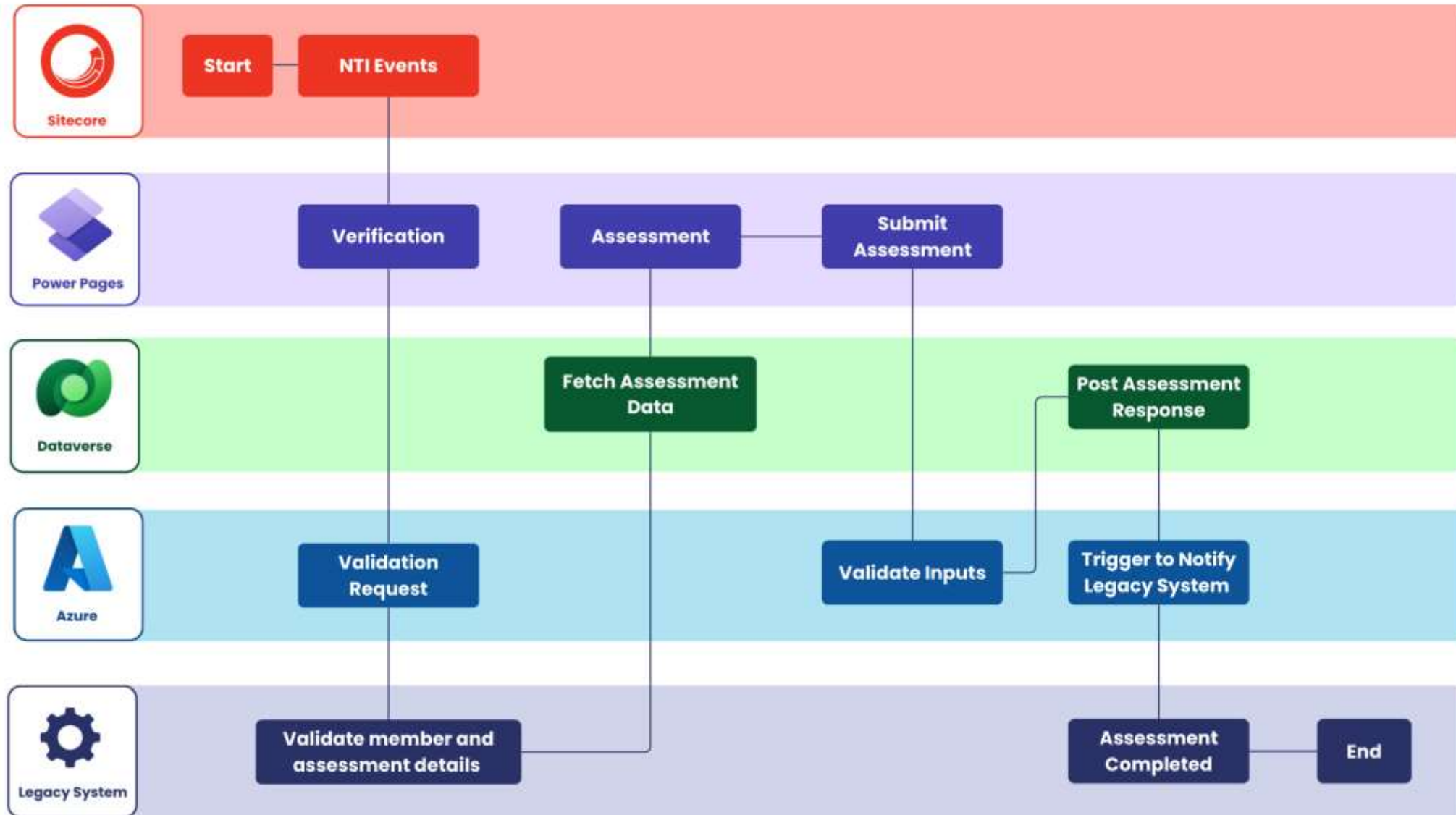
### Benefits

- Streamlined patient management processes, automated workflows, and centralized data management.
- Personalized patient portals, mobile apps, and automated communication tools improved patient engagement, satisfaction, and loyalty.
- Centralized patient data and seamless integration with EHR systems and other healthcare applications.
- Reduced operational costs through automation, improved resource allocation, and optimized scheduling and billing processes.

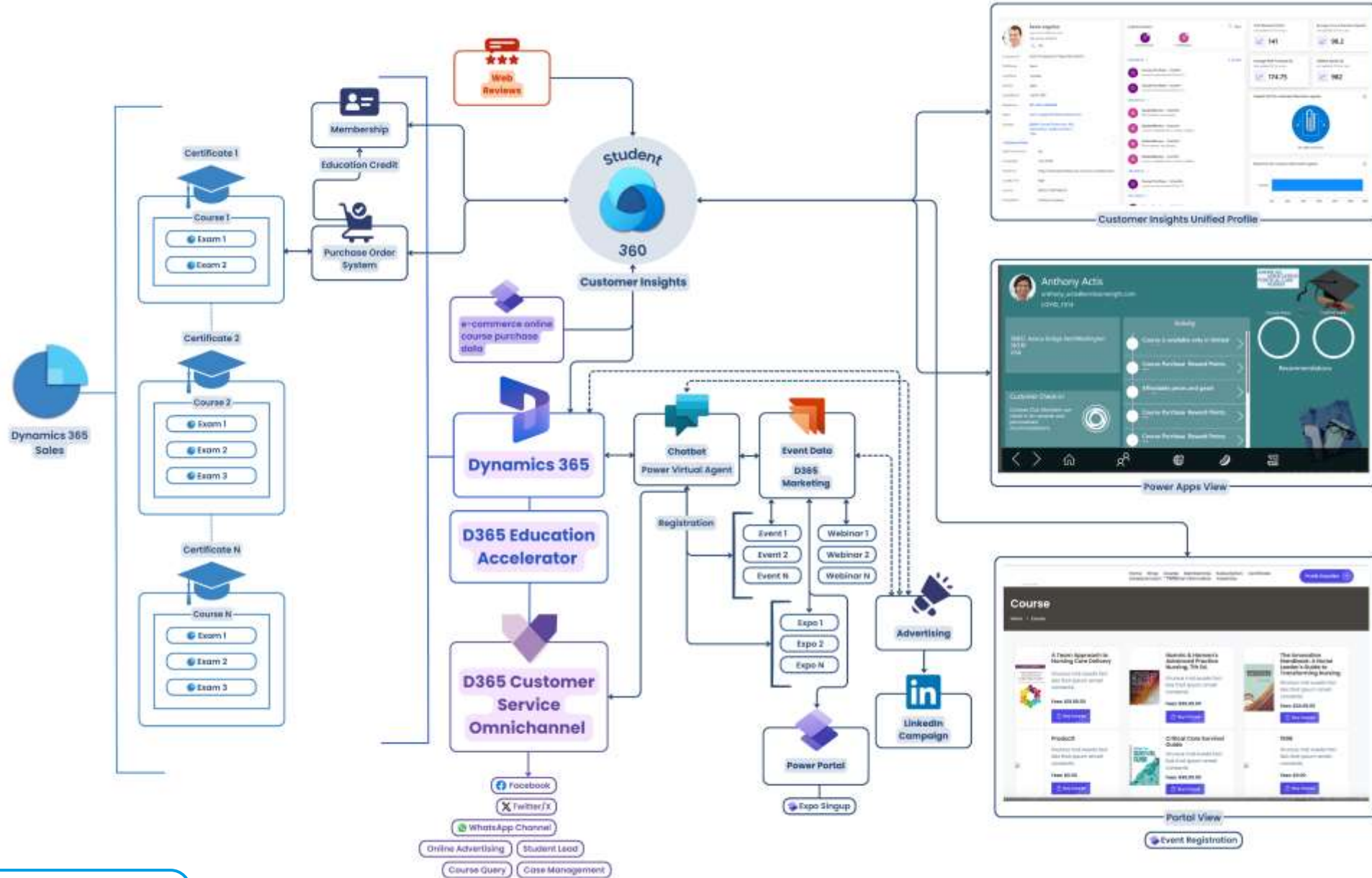
### Products/Services

- Implementation of Dynamics 365 F&SCM
- Power Pages
- D365 CE
- Power Automate
- Azure API
- SQL
- Fabric
- Managed Services
- Survey and Feedback Tool
- Membership Information Management
- Not-for-profit tool
- Testing Automation









## A Dairy Products Manufacturing Company

Produces and sells milk and dairy ingredients to domestic and international markets.

Industry

Dairy Products Manufacturing

Workforce

1000+



### Solutions

- **Supply Chain Modernization:** Implemented D365 F&SCM to create a unified system that standardized processes and improved operational efficiency.
- **Migration from Legacy Systems:** Ensured data integrity, enhanced data management, and a single source of truth for financial and operational data.
- **Sales Transformation:** Implemented D365 CE for better customer data analysis, improved service, and targeted marketing.
- **Accounts Receivable Automation:** Reduced manual effort, minimizing errors, and accelerating financial close processes.

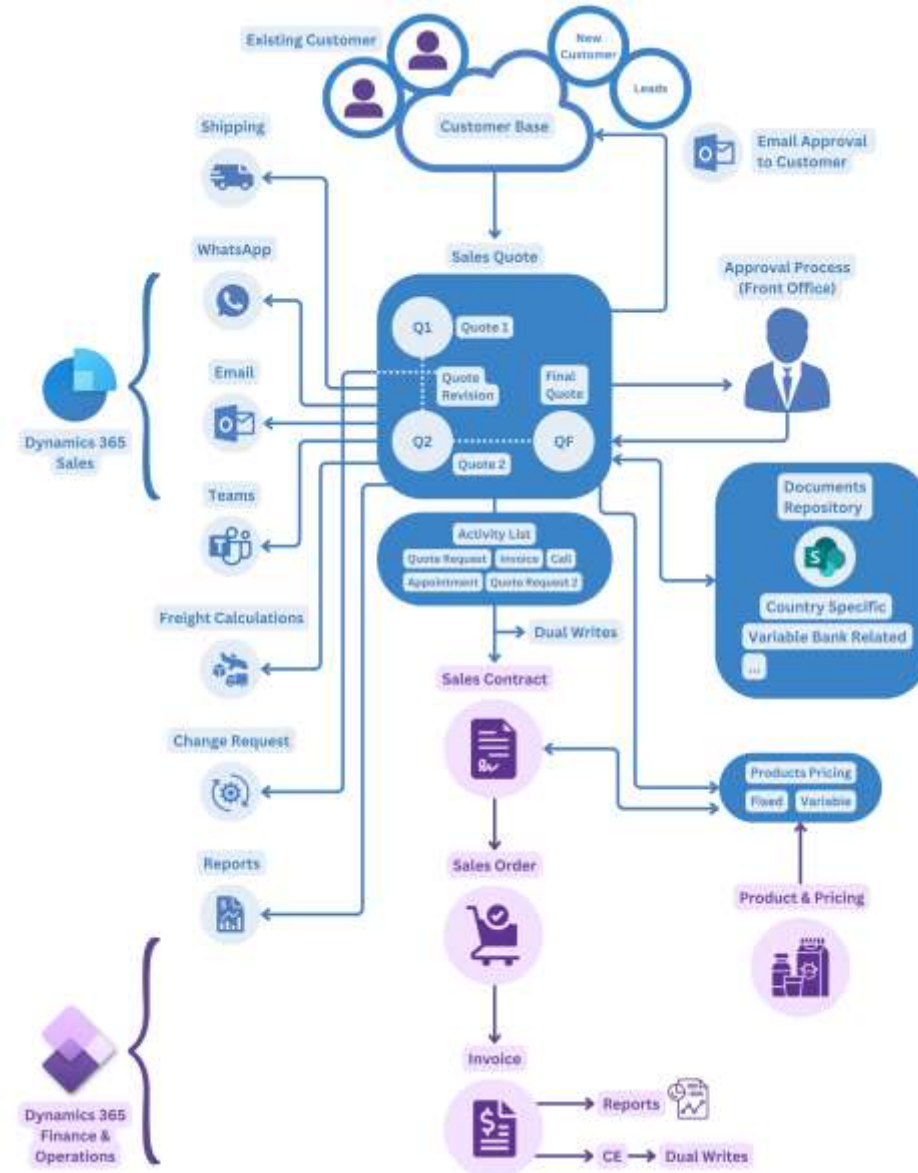
### Benefits

- A centralized system for all entities has been established, leading to a smooth M&A transition.
- Automated tasks, intelligent reporting, and seamless integration have been achieved.
- Improvements include enhanced data accuracy, security, compliance, and real-time insights.

### Products/Services

- D365 Finance and Supply Chain Management
- D365 Customer Engagement
- Power Platform
- Azure
- Managed Services
- Fabric
- Dual-write
- BI for D365
- Managed Services





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