



 **DynaTech** | Systems

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



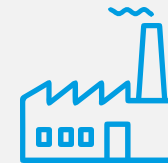
Successful Deployment
of 150+ Microsoft
Dynamics Projects



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

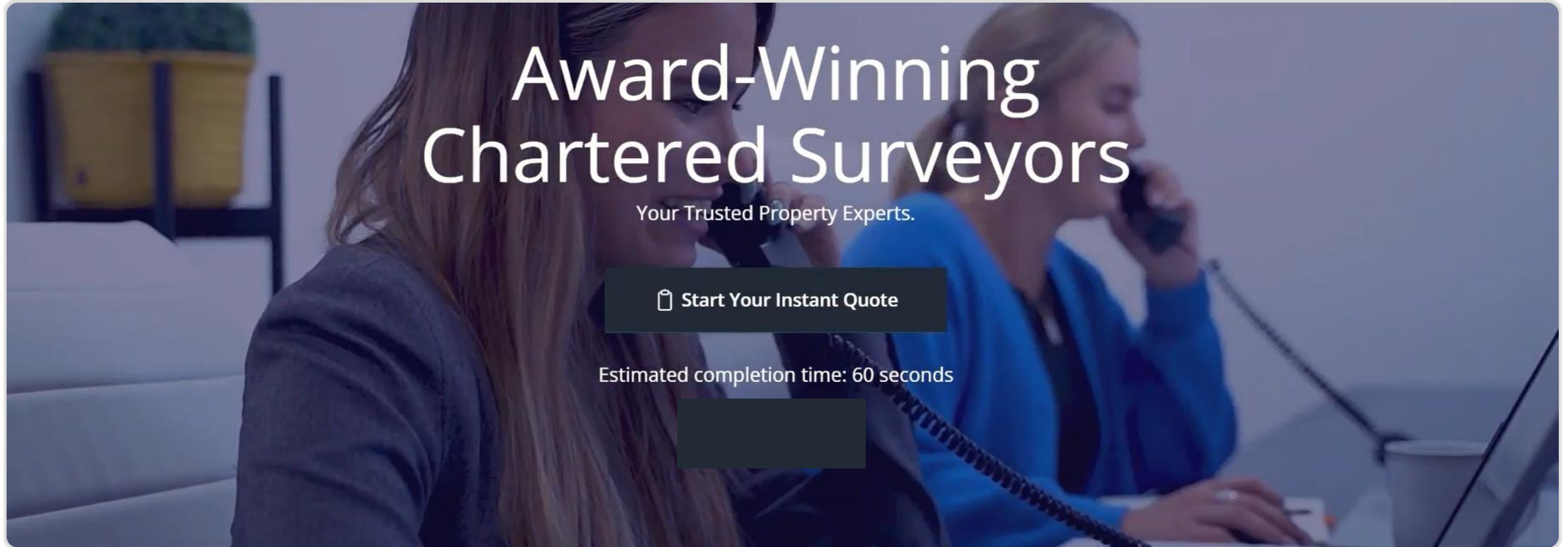


AI Builder

Power Automate Integration of DocuSign with D365 CRM




New customers can quickly create an instant quote for his required purpose.



Award-Winning Chartered Surveyors

Your Trusted Property Experts.

 Start Your Instant Quote

Estimated completion time: 60 seconds

The customers would be navigated to this page where the customers can select the form types for creating the quote.

The screenshot shows a web form with a progress bar at the top containing four steps: 1. Quote Details (active), 2. Your Details, 3. Property Details, and 4. Add On's. The main content area is titled "Which service do you need?". Below this title is a "Survey Types" dropdown menu. The dropdown is open, showing a list of options: Residential Survey (highlighted in blue), Commercial Survey, Party Wall, Project Management, and Block Management. Below the dropdown are three text input fields labeled "Line 2", "City", and "Country".

The customer needs to add all the required details like their contact details, and personal details.

Commercial Survey

- RICS Private Valuation
- RICS Building Survey
- RICS Building Survey & Valuation
- Commercial Building Survey
- Schedules of Dilapidations
- Other Services

Enter the address of the property to be inspected

Line 1

Line 2

City

Country

1 2 3 4

Quote Details ✓ Your Details Property Details Add On's

Your Details

Salutation

First Name

Last Name

Your Number

Your Email

It is important that your details are accurate to ensure your quote is

The customer needs to add all the required details like their property details, and, they can add the add-ons as per their requirements

The screenshot shows a multi-step form with four tabs: 'Quote Details' (checked), 'Your Details' (checked), 'Property Details', and 'Add On's'. The 'Property Details' section is active and contains the following fields:

- Estimated Property Value ***: Text input with value '36,655'.
- Number Of Bedrooms ***: Text input with value '3'.
- What is the property type? ***: Dropdown menu with 'Converted' selected.
- What is the tenure? ***: Dropdown menu with 'Freehold' selected.
- Is it a listed building? ***: Toggle switch set to 'Yes'.
- Any additional information?**: Text area containing the text: 'Land Registry is your go-to online database for house prices in the UK. It's an alternative way to find out the price tag on your home.'

The 'Add On's' section is also visible, featuring a progress indicator with steps 1-4. Step 3, 'Property Details', is the current step. It contains two add-on options:

- Reinstatement Cost for Insurance (£150)**
In order to insure the property the insurers need the reinstatement figure eg. the cost of rebuild should be the property burn down/collapse etc.
- Printed Copy of the Report (£20)**
Our reports are sent in electronic format only for timing and convenience, but we are able to print & post these off on demand.

At the bottom of the 'Add On's' section are 'Previous' and 'Submit' buttons.

Once the quote is generated the summary page will display all the filled information with the total amount to be paid and review these details.

Your RICS Building Survey & Valuation and Valuation Quote is:


£660.00
(including VAT)

[Request Callback](#) [Booknow](#)

[Message](#)

Summary



Postcode: HW1 345
Type: RICS Building Survey & Valuation
Purchase price: £36,655.00
Bedroom: 3
Listed Building: Yes



[check out our reviews](#)


[Exit](#)

Customer would receive an email with the login credentials for setting up the account with a new password.

Booking your survey.

 Demo User
To  Rinkal Binwani

[Reply](#) [Reply All](#) [Forward](#)  

Mon 16-01-2023 5.07 PM

Hello Rinkal Binwani,

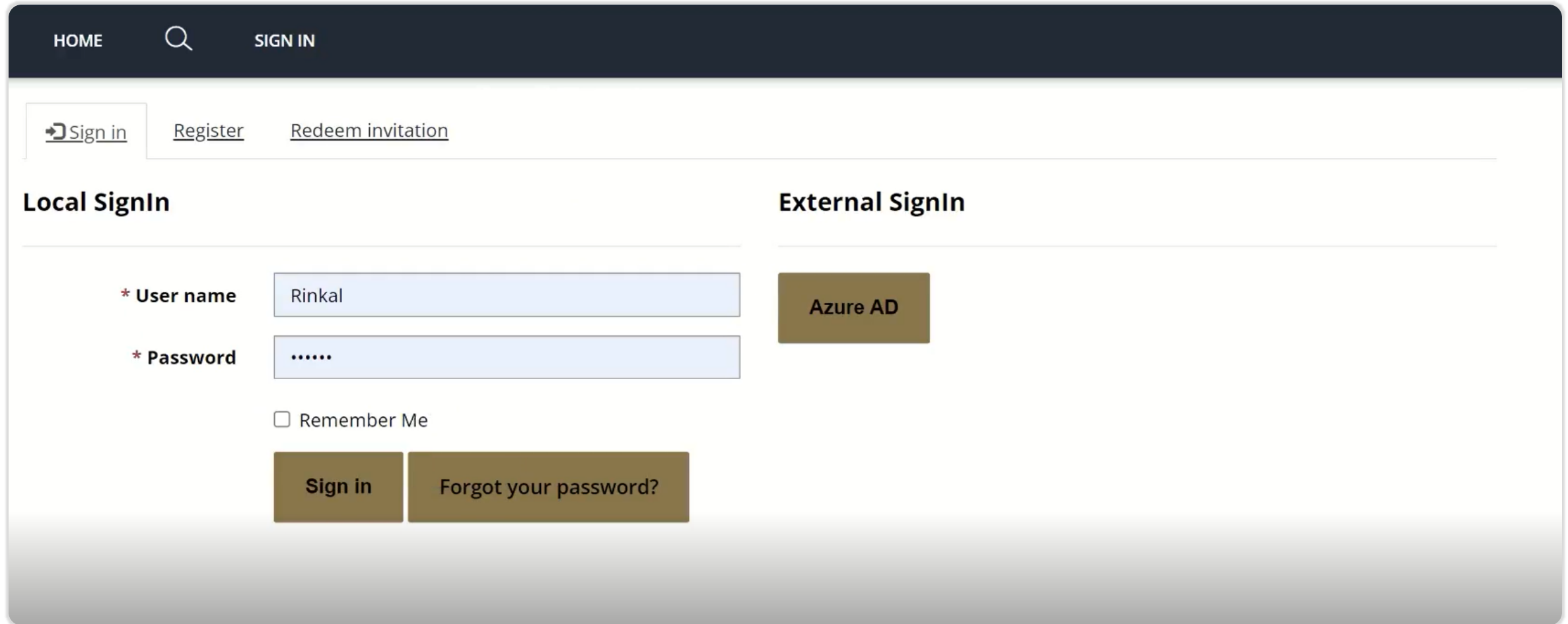
Thanks for generating instant quote.

This is to inform you that you are an existing member of
Please sign in with your credentials using this link : [Login](#) or reset your password using this link : [Forgot Password](#)

Thank you,
Nicholas Prinse BSc (Hons) MRICS MCIQB FCFI MCABE MCIAT MSEE MMC MFPWS
020 8001 7909
Director - Chartered Surveyor
London, Bristol, Surrey and Gloucestershire

This email may be sent on behalf of the Holding Company, Prinsegate Holdings Ltd (reg. 11922386; VAT reg. 300057466) and/or on behalf of any one of its Subsidiaries: Prinsegate Developments Ltd (reg. 8960415), Prinsegate Engineering Ltd (reg. 12325083), Prinsegate Project Management Ltd (reg. 11942326), Prinsegate Property Management Ltd (reg. 11943614), and Prinsegate Valuations Ltd (reg. 12321486). The Holding and Subsidiary Companies shall operate under the trading name Prinsegate Chartered Surveyors. Both the Holding and Subsidiary Companies are registered in England and Wales and whose registered offices are at 20 - 22 Wenlock Road, London, United Kingdom, N1 7GU; Tel: 02080017909; Email: info@prinsegate.com; Web: www.prinsegate.com Email communications may be sent on behalf of the Holding Company or any individual Subsidiary. Please seek clarification from the sender if there is any uncertainty. This message is intended solely for the addressee and may contain confidential information. If you have received this message in error, please send it back to us, and immediately and permanently delete it. Do not use, copy or disclose the information contained in this message or in any attachment.

Users can now sign in with their login details in this portal.



The screenshot shows a web portal with a dark blue header containing 'HOME', a search icon, and 'SIGN IN'. Below the header is a navigation bar with 'Sign in' (highlighted with a mouse cursor), 'Register', and 'Redeem invitation'. The main content area is split into two columns: 'Local SignIn' and 'External SignIn'. The 'Local SignIn' section has two text input fields: '* User name' with the value 'Rinkal' and '* Password' with masked characters '.....'. Below these is a 'Remember Me' checkbox. At the bottom of this section are two buttons: 'Sign in' and 'Forgot your password?'. The 'External SignIn' section contains a single button labeled 'Azure AD'.

After login, the customer can review the quote lists and its details and the payment link for doing the payment.

HOME QUOTE LIST NEW QUOTE CUSTOMER SERVICE - SUPPORT HOME RINKAL BINWANI

Quote List

HOME > QUOTE LIST

<u>Quote ID</u>	<u>Survey Types</u>	<u>Survey Service</u>	<u>Property Address</u>	<u>Total Paid (£)</u>	<u>Status Reason</u>	<u>Created On ↓</u>
QUO-01109-Z7V9N9	Commercial Survey	RICS Building Survey & Valuation	45 Bangs street Strandford HW HW1 345 UK	660.00	In Progress	1/16/2023 5:04 PM
QUO-01107-G0Q5Y0	Residential Survey	Other Services	45 berkland street HW D01 HH39 UK	900.00	In Progress	1/16/2023 3:16 PM

[View details](#)
[Payment](#)

The customer can review the quote details which are filled.

Payment Details

QUOTE INFORMATION		PROPERTY DETAILS	
Quote ID *	Survey Service	Number Of Bedrooms *	Property Types *
QUO-01109-Z7V9N9	RICS Building Survey & Valuation	3	Converted
Survey Types		Estimated Property Value *	<input checked="" type="checkbox"/> Listed Building *
Commercial Survey		£36,655.00	
		Tenure *	
		Freehold	

CALCULATIONS		PAYMENT DETAILS	
Survey Quote (£)	Total Quote (£)	Payment Source	Payment ID
400.00	550.00	—	—
Introducer Fees (£)	VAT (%)	Payment Status	Payment date
—	20	<input type="radio"/> No <input type="radio"/> Yes	—
Your Fees (£)	Total Paid (£)		
400.00	660.00		

A new quote would be created in D365, and we can review the details of the quote, like the survey details, customer details, and pricing calculation. Agent details can also be added if required.

Customer Details:

- Customer:** Rinkal Binwani (RB)
- Email:** rinkal.binwani@dynatechconsult...
- Business Phone:** 893820893
- Address 1:** 45 Bangs street strandford HW London HW1 345 UK

Agent Details:

- Agent:** David Paul (DP)
- Email:** test123@gmail.com
- Number:** * 6784932
- Address:** 29 Thornton St Hurst Green UK TN19...

Quote Information:

- Quote ID:** * QUO-01109-Z7V9N9
- Revision ID:** * 0
- Potential Customer:** * Rinkal Binwani
- Survey Types:** Commercial Survey
- Survey Service:** RICS Building Survey & Valuation
- Payment Terms:** ---

Property Details:

- Estimated Property Value:** * £36,655.00
- # Bedrooms:** * 3
- Property Types:** * Converted
- Tenure:** * Leasehold / Freehold (Freehold is selected)
- Listed Building:** * Yes

Calculations:

Survey Quote (£)	400.00	Total Quote (£)	550.00
Introducer Fees (£)	---	VAT (%)	20
Your Fees (£)	400.00	Total Paid (£)	660.00
Optional Extras (£)	£150.00		

Additional Information:

Land Registry is your go-to online database for house prices in the UK. It's an alternative way to find out the price tag on your home. Whether you want to have a house valuation for a mortgage, insurance, or you are just interested in how long you need to save to afford a particular home, Land Registry can be of help.



Additional add-ons, fees can also be added to the quotation, and this will be added to the final pricing calculation.






The screenshot displays the Dynamics 365 interface for a quote. The quote ID is QUO-01109-Z7V9N9, saved as 'Prinsegate Instant Quote'. The current status is 'Quote (5 Min)', indicated by a red circle and a 'Quote to Work Order Flow' banner. The total amount is 720.00. The 'Add On's' tab is selected, showing a grid of options with toggle switches.

Add-on Name	Price	Status
Early Appointment	(£50)	No
24-hour Turnaround	(£100)	No
Extra Photos	(£20)	No
360 Damp Testing	(£250)	No
Vendor Checklist	(£10)	No
Thermal Imaging	(£200)	No
Pre-Survey Call	(10mins) (£50)	Yes
Outbuildings & Garages	(£100)	No
Snagging	(£300)	No
Defect Cost Analysis	(£500)	No
Defect Cost Analysis	(£600)	No
Printed Copy of the Report	(£20)	No
Snagging	(£500)	No
Reinstatement Cost for Insurance	(£150)	Yes


Since the quote is created, the customer would receive an email regarding the terms and conditions to be signed by DocuSign.


Quote - QUO-01109-Z7V9N9 is Created

 DocuSign Demo System <dse_demo@docusign.net>
To  Rinkal Binwani

 Reply  Reply All  Forward  

Mon 16-01-2023 5.07 PM

 If there are problems with how this message is displayed, click here to view it in a web browser.






Karthik P sent you a document to review and sign.

REVIEW DOCUMENT

Karthik P
Karthik.P@dynatechconsultancy.com

Dear RemondJenifer,
1

All folders are up to date. Connected to: Microsoft Exchange   

Customer can now add their signature wherever required.

Done! Select Finish to send the completed document. Area Pointer **FINISH** **OTHER ACTIONS**

I/We hereby give notice that I/we cancel my/our contract of sale of the following goods/services supplied:

Ordered on:

Name of consumer(s): RemondJenifer

Address of consumer(s):

Signature of consumer(s): DocuSigned by: *RemondJenifer*
8749F2155D5D4A7...

Date signed: 1/16/2023

Ready to Finish? **FINISH**

You've completed the required fields. Review your work, then select **FINISH**.

Once the signatures are added to the document, the customer can click finish, and a finished signing message will pop up.

Adopt Your Signature [Close]

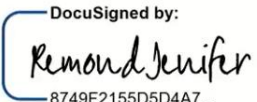

Confirm your name, initials, and signature.

* Required

Full Name* Initials*

SELECT STYLE | DRAW | UPLOAD

PREVIEW


DocuSigned by:  DS 
8749F2155D5D4A7...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes (including my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN | CANCEL

DocuSign

You've finished signing!



You'll receive an email copy once everyone has signed.

Now in the next step the payment is pending so now the customer can proceed with the payment from the portal itself.

Workflow Progress: Quote (Active for 11 minutes) → **Paid (< 1 Min)** → Accepted → Booked → Inspected → Report

Payment Information Pop-up:

- Payment Source: ---
- Payment Status: No
- Next Stage

CUSTOMER DETAILS

Rinkal Binwani

- Email: rinkal.binwani@dynatechconsult...
- Business Phone: 893820893
- Address 1: 45 Bangs street strandford HW London HW1 345 UK

PROPERTY DETAILS

- Quote ID: * QUO-01109-Z7V9N9
- Revision ID: * 0
- Potential Customer: * Rinkal Binwani
- Survey Types: Commercial Survey
- Survey Service: RICS Building Survey & Valuation
- Payment Terms: ---
- Estimated Property Value: * £36,655.00
- # Bedrooms: * 3
- Property Types: * Converted
- Tenure: * Leasehold / Freehold
- Listed Building: * Yes

CALCULATIONS

Survey Quote (£)	400.00	Total Quote (£)	630.00
Introducer Fees (£)	30.00	VAT (%)	20
Your Fees (£)	430.00	Total Paid (£)	756.00
Optional Extras (£)	£200.00		

ADDITIONAL INFORMATION

Land Registry is your go-to online database for house prices in the UK. It's an alternative way to find out the price tag on your home. Whether you want to have a house valuation for a mortgage, insurance, or you are just interested in how long you need to save to afford a particular home, Land Registry can be of help.

Here the customer can select the quote, and a payment link would appear for doing the payment.

HOME QUOTE LIST NEW QUOTE CUSTOMER SERVICE - SUPPORT HOME RINKAL BINWANI

Quote List

HOME > QUOTE LIST

☰ Prinsegate Quote In Progress View

Quote ID	Survey Types	Survey Service	Property Address	Total Paid (£)	Status Reason	Created On ↓
QUO-01109-Z7V9N9	Commercial Survey	RICS Building Survey & Valuation	45 Bangs street Strandford HW HW1 345 UK	660.00	In Progress	1/16/2023 5:04 PM
QUO-01107-G0Q5Y0	Residential Survey	Other Services	45 berkland street HW D01 HH39 UK	900.00	In Progress	1/16/2023 3:16 PM

View details
Payment

Here, the customer can choose from multiple payment options, such as Stripe, Bank Transfer, and Pay Later, by adding all the required information.

The screenshot shows a web interface for selecting a payment method. At the top, there is a navigation bar with links for HOME, QUOTE LIST, NEW QUOTE, and CUSTOMER. The user's name, RINKAL BINWANI, is displayed in the top right. The main heading is "Payment Stripe" with a breadcrumb trail "HOME > PAYMENT STRIPE".

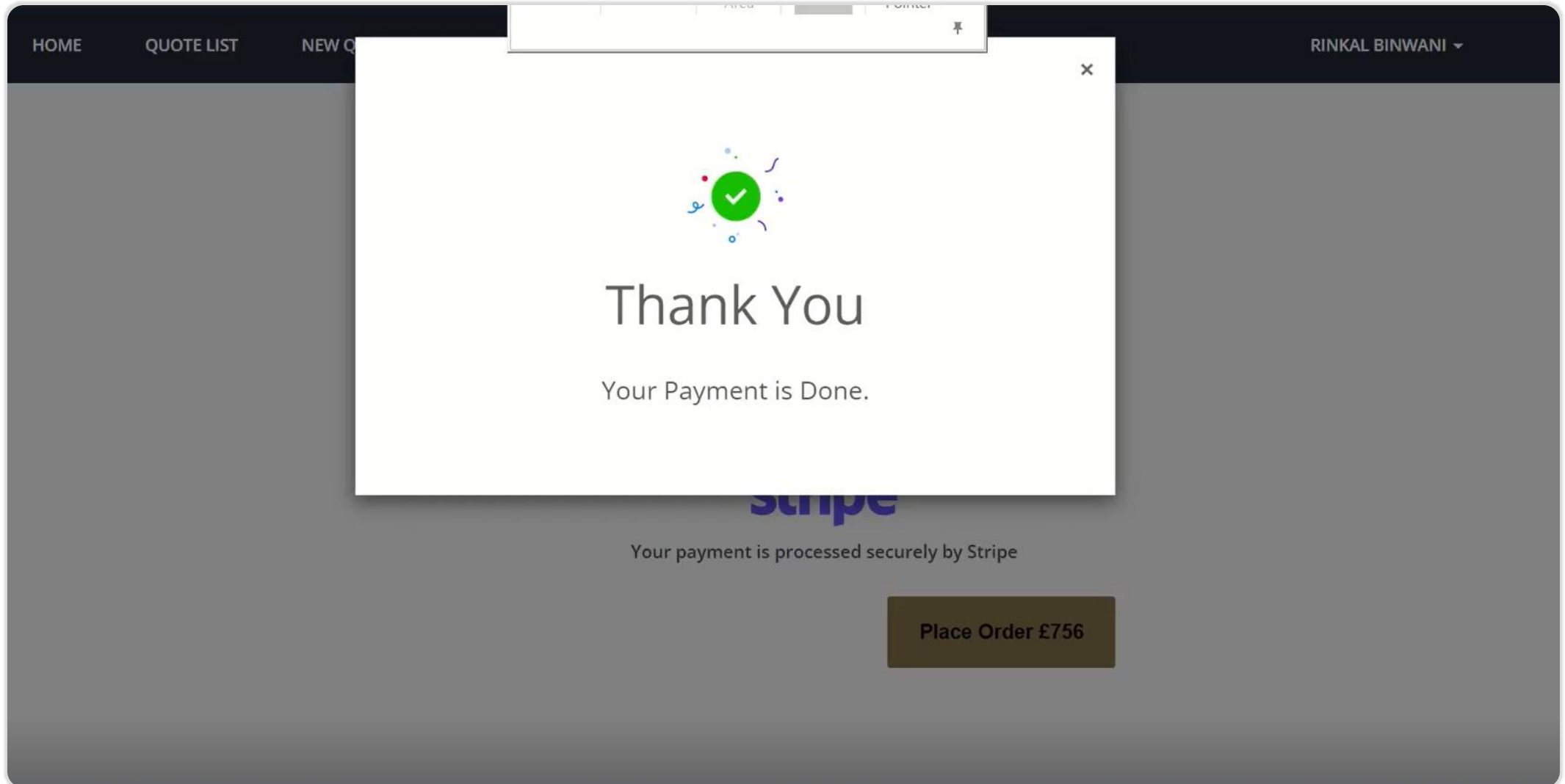
The "Select Payment Method" section contains three radio button options:

- Credit or Debit Card **stripe**
- Bank Transfer
- Pay Later

Below the radio buttons are several input fields for billing information:

Billing AddressLine 1	45 Bangs street
Billing AddressLine 2	Strandford
Billing City	HW
Billing Postcode	HW1 345
Billing CountryCode	GBP - British Pound
Name	Remond Jenifer

Thank you message once the payment is done.



Now in the D365 CRM, the status shows payment completed and can proceed to the next steps.

The screenshot displays the Dynamics 365 CRM interface for a quote record. The top navigation bar shows 'Dynamics 365' and 'SANDBOX'. The main header area includes the quote ID 'QUO-01109-Z7V9N9 - Saved' and the status 'Payment Completed' with a total paid amount of '756.00'. Below this is a process flow bar with stages: Quote, Paid, Accepted (< 1 Min), Booked, Inspected, and Report. The 'Accepted (< 1 Min)' stage is currently active and highlighted with a red circle. A tooltip is visible over this stage, showing 'Active for less than one minute' and a 'Next Stage' button. The main content area is divided into several sections: 'CUSTOMER DETAILS' for Rinkal Binwani, 'AGENT DETAILS' for David Paul, 'PROPERTY DETAILS' showing an estimated value of £36,655.00 and 3 bedrooms, and a table of 'CALCULATIONS' with a total quote of £630.00 and total paid of £756.00. The 'CALCULATIONS' table includes items like Survey Quote (£400.00), Producer Fees (£30.00), and Optional Extras (£200.00).

Here all the email conversations are displayed with quote send to the customer and the payment confirmation details.

The image displays two screenshots of the Dynamics 365 interface, illustrating the integration of DocuSign with CRM. Both screenshots are for a quote titled 'QUO-01109-Z7V9N9' in a 'SANDBOX' environment.

The top screenshot shows the 'Quote' record with a 'Timeline & Reports' view. The timeline includes stages: Quote, Paid, Accepted (< 1 Min), Booked, Inspected, and Report. The 'Payment Completed' status is shown with a total paid amount of 756.00. The 'Timeline' pane on the left shows two notes: one from 5:14 PM stating 'Note modified by Demo User' with a DocuSign document link, and another from 5:06 PM stating 'Note modified by Demo User' with the text 'Booking your survey. Hello Rinkal Binwani.Thanks for generating instant quote.This is to inform you that you are an existing member o...'. The 'REPORT CONNECTIONS' pane is also visible.

The bottom screenshot shows the 'Payment Information' view for the same quote. It lists the following details:

- Payment Source: Instant Payment via Stripe
- Payment Status: Yes
- Payment ID: ch_3MQr9GI5rmy4IESM0l2lBgCj
- Payment date: 1/16/2023 5:17 PM
- Potential Customer: Rinkal Binwani

Since the payment is completed a work order would be created in the system.

QUO-01109-Z7V9N9 - Saved
Quote · Prinsegate Instant Quote

Payment Completed
Current Status: 756.00
Total Paid (£)

Quote to Work Order Flow
Active for 12 minutes

Quote → Paid → **Accepted (< 1 Min)** → Booked → Inspected → Report

Active for less than one minute

Payment ID: ch_3MQr9GI5mv...
Payment date: 1/16/2023 5:17 PM

Next Stage

CUSTOMER DETAILS
Rinkal Binwani
Email: rinkal.binwani@dynatechconsult...
Business Phone: 893820893
Address 1: 45 Bangs street strandford HW London HW1 345 UK

AGENT DETAILS
David Paul
Agent: David Paul

PROPERTY DETAILS
Estimated Property Value: £36,655.00
Bedrooms: 3
Property Types: Converted
Tenure: Leasehold / Freehold
Listed Building: Yes

Survey Quote (£)	400.00	Total Quote (£)	630.00
Producer Fees (£)	30.00	VAT (%)	20
Sur Fees (£)	430.00	Total Paid (£)	756.00
Optional Extras (£)	£200.00		

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Want to know more?

Contact Us!

DynaTech Systems has proudly served clients seeking advanced tech solutions across the globe with top-notch precision and excellence.



Locations

USA, Canada, UK, India



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Phone

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