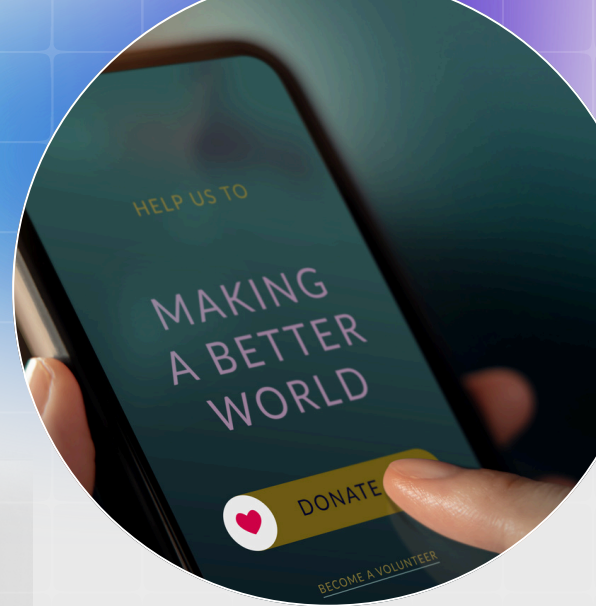![DynaTech Systems | Microsoft Solutions Partner]

# A Global Non-Profit Educational Organization

## Automating Membership, **Finance, and Tax Processes** with D365 and API Integrations

### About the Company

A U.S.-based non-profit educational organization headquartered in Englewood, Colorado, empowering individuals to improve their public speaking and leadership skills. With a presence in 148 countries, the organization supports over 270,000 members and 14,200+ clubs worldwide through structured learning and leadership programs.


HELP US TO MAKING A BETTER WORLD
DONATE
BECOME A VOLUNTEER

### Industry

Membership & Association – Education & Non-Profit

**Workforce**
**500+**

Presence
**Global (148 Countries)**

### Service

| | | | | |
|---|---|---|---|---|
| D365 Finance & Supply Chain Management | D365 Customer Engagement | Power Platform | Power Automate | Power BI |
| Dual Write | Avalara Tax Integration | 3PL Integration | Bank Reconciliation Automation | API Integration |

## Solution

**01 ERP & CRM Modernization**
Upgraded from Dynamics GP to D365 Finance & Supply Chain Management and D365 Customer Engagement, creating a unified platform for finance, membership, and operations.

**02 Membership Management Automation**
Developed a Membership Information Management application using D365 and Power Platform for real-time synchronization of members, clubs, and regions across systems.

**03 API-Driven Integration Ecosystem**
Implemented 100+ APIs to connect Sitecore Membership Portal, E-commerce platform, D365 Sales & Customer Service, 3PL logistics, and payment gateways, ensuring seamless data flow.

**04 Financial Automation & Reconciliation**
Enabled automated revenue and payment journal generation, intelligent deferred revenue management, and complete bank reconciliation through Power Automate and SFTP workflows.

**05 Tax Compliance Integration**
Integrated Avalara via custom APIs to automate tax calculation, retrieval, posting, and confirmation across memberships, awards, digital certificates, and gift orders.

**06 Real-Time Analytics**
Delivered Power BI dashboards for transaction monitoring, reconciliation accuracy, and performance tracking.

## Results and Outcomes

- Reduced membership payment processing time from several hours to real-time.
- Automated reconciliation eliminated manual effort and financial discrepancies.
- Achieved transaction-level visibility with real-time revenue journals.
- Efficiently processed millions of membership orders during global renewal cycles.
- Improved financial transparency, audit readiness, and compliance.
- Enhanced member experience through faster renewals and special pricing capabilities.
- Streamlined collaboration between finance, membership, logistics, and customer service.