

A Professional Accounting Association

Integrated **Finance, Sales & Customer Service Solutions** to Cut Costs and Boost Efficiency

About the Company

It is a leading professional body with over 60,000 members and 200,000–300,000 active member records. It oversees education, training, certification, and compliance for the accounting profession across South Africa.



Industry

**Education, Certification,
Accounting Association**

Location

South Africa

Workforce

500+



Service



D365 F&SCM



D365 CE



Power Pages



Azure
Services



Microsoft
Fabric

Solution

Unified Platform

Consolidated iMIS CRM, GP Accounting, and 10+ portals into Dynamics 365 and Power Platform for centralized member and finance management.

01

Automated Invoicing

Reduced 60K-member invoicing cycle from two weeks to 8 hours with Azure-based automation..

02

Real-Time Data Sync

Enabled two-way data integration between iMIS, D365 CE, and F&SCM via Power Automate and Fabric.

03

Member Portals

Built Power Pages and mobile PWAs for renewals, events, exams, and payments.

04

Finance & Payments

Automated allocation for 1K+ daily transactions with integrated reporting via Power BI..

05

Additional Modules

TCMS for trainee management, Events & Exams, Legal & Disciplinary, Chatbot for support, and Contract Management.

06

Results and Outcomes

- 95% faster invoicing (from 2 weeks to 8 hours).
- ~40% cost savings by replacing custom portals with Power Pages.
- 1K+ daily payments auto-processed with real-time reconciliation.
- Real-time reporting via Power BI and Azure Synapse.
- Enhanced member experience with unified self-service access.
- Improved compliance and operational visibility across all departments.