

A Professional Accounting Association Integrated **Finance, Sales and Member Services with Dynamics 365 and Power Platform**



About the Company

A leading professional body for chartered accountants in South Africa, responsible for education, certification, and compliance services for over 60,000 members. The institution manages 200,000+ active member records and supports education, training, and membership programs across the accounting profession.

Industry

Education,
Certification,
Accounting
Association

Workforce
500+
Presence
South Africa

Service



D365 Finance & Supply
Chain Management



Testing
Automation



D365 Customer
Engagement (CE)



PayU
Integration



Power
Pages



Managed
Services



Azure
Services



Power BI



Microsoft
Fabric

Solution

Unified Platform

01

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

Automated Invoicing

02

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

Real-Time Data Sync

03

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

Member Portals

04

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

Finance & Payments

05

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

Additional Modules

06

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

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.