DynaTech | Systems | Microsoft Solutions Partner

A Promotional Management & Branding Company

Modernizing **Sales, Finance, and Customer Engagement** with Dynamics 365 & Power Pages

About the Company

A U.S.-based promotional management and corporate branding company delivers custom merchandise, vendor collaboration, and promotional programs for sports teams and enterprises.

Industry

Promotional Products & Corporate Branding

Workforce 300+ Users

Service

- D365 Finance
- D365 Sales
- Power Pages Portal
- **Avalara / VERTEX** — Avalara/Vertex Tax Integration
- Dual Write Integration
- Red Maple Payments
- PromoStandards API
- **docusign** — DocuSign/Adobe Sign
- Copilot AI

Solution

01 Unified Sales & Finance Platform
Implemented D365 Sales and Finance with Dual Write integration to synchronize opportunities, quotes, orders, invoices, and payments

02 PromoStandards API Integration
Enabled real-time product and pricing data retrieval for accurate quoting and vendor collaboration

03 Automated Quotation & Margin Validation
Configured approval workflows where quotes under 20% margin required managerial sign-off, ensuring compliance and profitability.

04 Digital Approvals
Integrated DocuSign/Adobe Sign for e-signature workflows to accelerate quote-to-order conversions.

05 Customer Self-Service Portal
Built on Power Pages, allowing customers to view, approve, and track quotes, orders, and invoices, as well as make secure online payments via Red Maple.

06 Shipping & Tax Automation
Integrated EasyPost for carrier rate comparison and Avalara/Vertex for automated tax calculation and compliance.

07 AI & Reporting
Leveraged Copilot for predictive sales insights and Power BI dashboards for real-time tracking of leads, opportunities, and order performance..

Results and Outcomes

- 30% faster quote-to-order cycle through automated approvals and e-signatures.
- 50% reduction in manual PO creation time.
- 300+ users onboarded to the self-service customer portal.
- Real-time visibility into orders, invoices, and payments for customers and internal teams.
- Enhanced sales productivity with Copilot-driven insights and automated workflows.
- Improved collaboration between sales, finance, and customers through a unified digital ecosystem.