DynaTech | Systems

Accelerate Business

DynaTech | Systems

What Sets Us Apart

DynaTech's Competitive Advantage

Backed by years of expertise and a team of skilled professionals, DynaTech Systems stands at the forefront of the IT services industry. Our extensive portfolio includes cutting-edge solutions in cloud, ERP and CRM implementation, data analytics, artificial intelligence, and more.

We prioritize long-term partnerships built on collaboration and trust, delivering innovative, scalable, and secure solutions to keep our clients ahead in a rapidly evolving landscape.

AICPA Service Organization Control Reports
AICPA SOC 2
Formerly SAS 70 Reports

Microsoft Solutions Partner

Great Place To Work. Certified FEB 2025-FEB 2026 INDIA

DUN & BRADSTREET D-U-N-S® REGISTERED™

ISO 9001:2015

CMMI level 3

150+
Global Projects

100+
Happy Clients

450+
Expert Minds

AI – Led Microsoft Cloud Capabilities

Microsoft Cloud & Low Code

- Azure Infra
- Azure Services
- Logic Apps
- Service Bus
- Event Grid
- API Management
- Synapse Analytics
- Load Testing
- Functions
- Data Factory
- Power Pages
- Power Automate
- Power Apps
- AI Builder
- Azure FHIR

Agentic AI Business Applications

- Sales
- Finance
- SCM
- Project Operations
- Customer Service
- Field Service
- Customer Insights & Marketing
- Human Resources
- Commerce

Data & AI

- Fabric
- Copilot
- Power BI
- Data Warehouse
- OneLake
- Data Lake
- Data Factory
- Data Science
- Lakehouse
- Real-Time Intelligence
- Data Engineering
- Dataverse
- Microsoft Purview
- Databases
- Azure AI Foundry
- Copilot Studio

DynaTech | Systems

Dynamics 365 CRM

Implementation Expertise & Configurable Solutions

DynaTech Systems – Microsoft Solutions Partner

- 150+ successful Dynamics 365 implementations
- Proven experience across Manufacturing, Chemicals, Agriculture, Education, Associations, Retail, Sports & Non-profits
- Comprehensive capabilities: CRM, Marketing, Customer Service, Portals, Integrations, Analytics
- Expertise in large-scale, multi-region CRM rollouts
- Focus on configurable CRM—aligned with real business processes, not template-based deployments

We design CRM systems that

1. Adapt to your specific business workflows
2. Support deep customizations (entities, plugins, approval flows, automation)
3. Integrate seamlessly with ERP, portals, WhatsApp, CTI, mobile apps
4. Centralize Sales, Marketing, Service & Operations data
5. Deliver intelligence through Power BI and Microsoft Fabric
6. Provide extensibility, scalability, and control through DevOps-driven delivery

Lead Capture Automation

1

› Collect leads from web forms, emails, WhatsApp, events, and campaigns directly into CRM with automated routing.

Lead Qualification & Scoring

2

› Assign scores and qualification rules to prioritize high-intent leads.

Opportunity Lifecycle Management

3

› Track deals through configurable stages with clear visibility into progress, blockers, and next steps.

Pipeline & Forecast Visibility

4

› Monitor revenue forecasts, deal velocity, and pipeline health in real time.

Account Hierarchy Mapping

5

› Visualize multi-level customer structures for accurate reporting and strategic planning.

Field Sales Route Optimization

6

› Plan customer visits with Google route optimization and nearby contact suggestions.

Sales Activity Timeline

7

› View all interactions—emails, calls, tasks, meetings—in a unified timeline for every customer.

Sales Copilot Assistance

8

› Use AI to summarize records, draft emails, and suggest next steps based on activity history.

Real-Time Customer Journeys

Trigger automated email, SMS, and WhatsApp flows based on customer behavior.

Email & SMS Campaign Designer

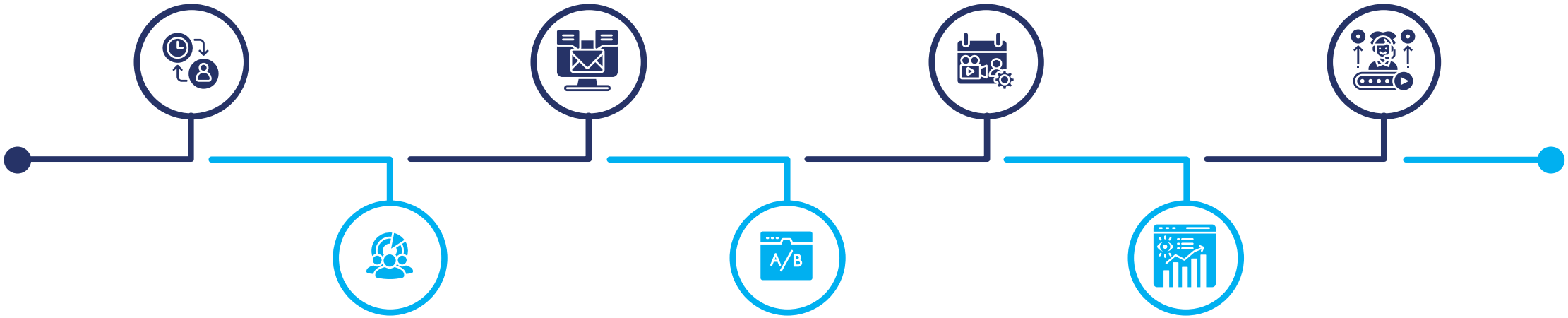
Design branded email or SMS templates using drag-and-drop tools.

Event & Webinar Management

Capture registrations, track attendance, and trigger follow-up journeys.

Lead Nurturing Automation

Create pathways for cold or warm leads to move through personalized content sequences.



Segmentation & Audience Builder

Create dynamic segments using demographic, behavioral, and transactional data.

A/B Testing

Compare variations of messaging or design to improve performance.

Marketing Insights Dashboard

Monitor opens, clicks, form submissions, conversions, and bounce trends.

Custom Estimation Models

Support estimation for projects, services, materials, and multi-line configurations.

Portal & DocuSign Integration

Enable customers to review, approve, and sign quotes directly through the customer portal with seamless DocuSign workflow integration.

Configurable Question-Based, Product & Project Configurator

Advanced configurator supporting dynamic questionnaires, rule-based product configurations, and project-specific customization.

Custom Project Estimate Requests

Allow customers or internal teams to initiate estimate requests for custom projects, capturing detailed scope, requirements, and pricing inputs for accurate quotation.

Approval Workflow Automation

Set up multi-level approval paths based on discount levels, margins, or deal size.

Contract & Customer-Specific Pricing

Apply negotiated customer pricing automatically during quote preparation.

Configurable Quoting Engine

Create quotes with cost, margin, discounts, and pricing rules built specifically for your industry.

Vendor & Program Pricing

Integrate vendor price lists and promotional incentives into your quoting flow.

ERP-Integrated Price & Tax Lookup

Pull real-time prices, taxes, and trade agreements from ERP systems.

Quote-to-Order Conversion

Convert approved quotes directly into sales orders without manual effort.

01

Centralized Case Management

Create, assign, and resolve customer issues using structured processes and SLAs.

02

Omnichannel Workspace

Manage WhatsApp, chat, email, and voice conversations from a single agent interface.

03

Automated Case Routing

Apply rules to route cases to the right team, queue, or agent based on criteria.

04

Service-Level Agreements (SLAs)

Track response and resolution time with automated escalations and timers.

05

AI Knowledge Recommendations

Suggest relevant knowledge articles to agents using AI for faster issue resolution.

06

Copilot for Customer Service

Generate summaries, respond to cases, and draft customer replies with AI assistance.

07

Email-to-Case Automation

Convert customer emails into structured cases without manual intervention.

Customer Self-Service Portal

› Let customers view orders, invoices, cases, knowledge articles, and profile details.

Dealer/Distributor Portal

› Offer product catalogs, price lists, inventory, loyalty points, and order placements.

Vendor Collaboration Portal

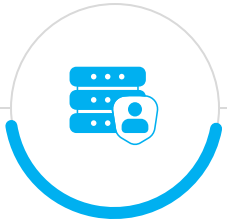
› Enable vendors to upload documents, submit prices, track requests, and update information.

Member & Subscription Portal

› Manage renewals, certifications, payments, and benefits for association members.

Case & Request Submission

› Allow users to log service requests directly from the portal.



Secure Role-Based Access

› Show different information based on customer, dealer, vendor, or member roles.

Portal Chatbot

› Provide instant Q&A, product help, and guided navigation through an AI bot.

Order Creation from CRM

› Generate orders directly in CRM with linked quotes, products, and pricing.

Order Creation from WhatsApp/Portal

› Allow customers to place orders through multilingual WhatsApp templates or portals.

Inventory Availability Check

› Pull real-time stock levels from ERP before order confirmation.

Automated Tax Calculation

› Apply correct VAT/GST/tax rules through ERP or tax engine integration.

Shipment Tracking

› Show live shipment status and logistics updates to customers or agents.

Invoice Retrieval

› Let customers view or download invoices via CRM or portal.

Price List & Trade Agreement Sync

› Ensure CRM pricing always matches ERP pricing data.

Copilot Across Sales, Service & Marketing

› Microsoft's new Copilot experience provides natural-language assistance inside D365.

Copilot for Sales

› Generate emails (follow-ups, introductions, proposals)

› Summarize opportunities, leads, accounts

› Draft meeting prep and summaries from Outlook + CRM data

› Suggest next best actions and talking points

› Real-time call insights during Teams calls

Copilot for Customer Service

› Generate response drafts for agents

› Summarize cases & conversation history

› Recommend knowledge articles and steps to resolution

› Auto-classification and routing of cases

› Real-time suggested responses in omnichannel chat

AI Insights in Sales

Sales Insights (standard + premium)

› **Predictive lead scoring** AI ranks leads based on conversion likelihood.

› **Predictive opportunity scoring** Highlights deals likely to close or require action.

› **Relationship analytics** Conversation sentiment, activity levels, health score.

› **Assistant (formerly Sales Assistant)** Alerts for inactivity, email opens, upcoming renewals.

› **Conversation Intelligence** AI-powered analysis of call recordings (topics, sentiment, competitors mentioned).

AI Features in Customer Service

Customer Service Insights

- Case resolution & topic clustering
  (AI groups recurring issues automatically)
- Agent performance insights
- Case backlog prediction
- Sentiment analytics
- Automated routing based on historical patterns

Omnichannel AI Enhancements

- Real-time sentiment tracking in chat
- Smart suggestions for macros and responses
- AI-based conversation routing & prioritization

Copilot + AI for Field Service

Copilot + AI for Field Service

- Work order summarization
- Predictive scheduling suggestions
- Technician recommendations
- AI-powered sensor alerts (IoT)

Marketing AI (Dynamics 365 Marketing / Customer Insights – Journeys)

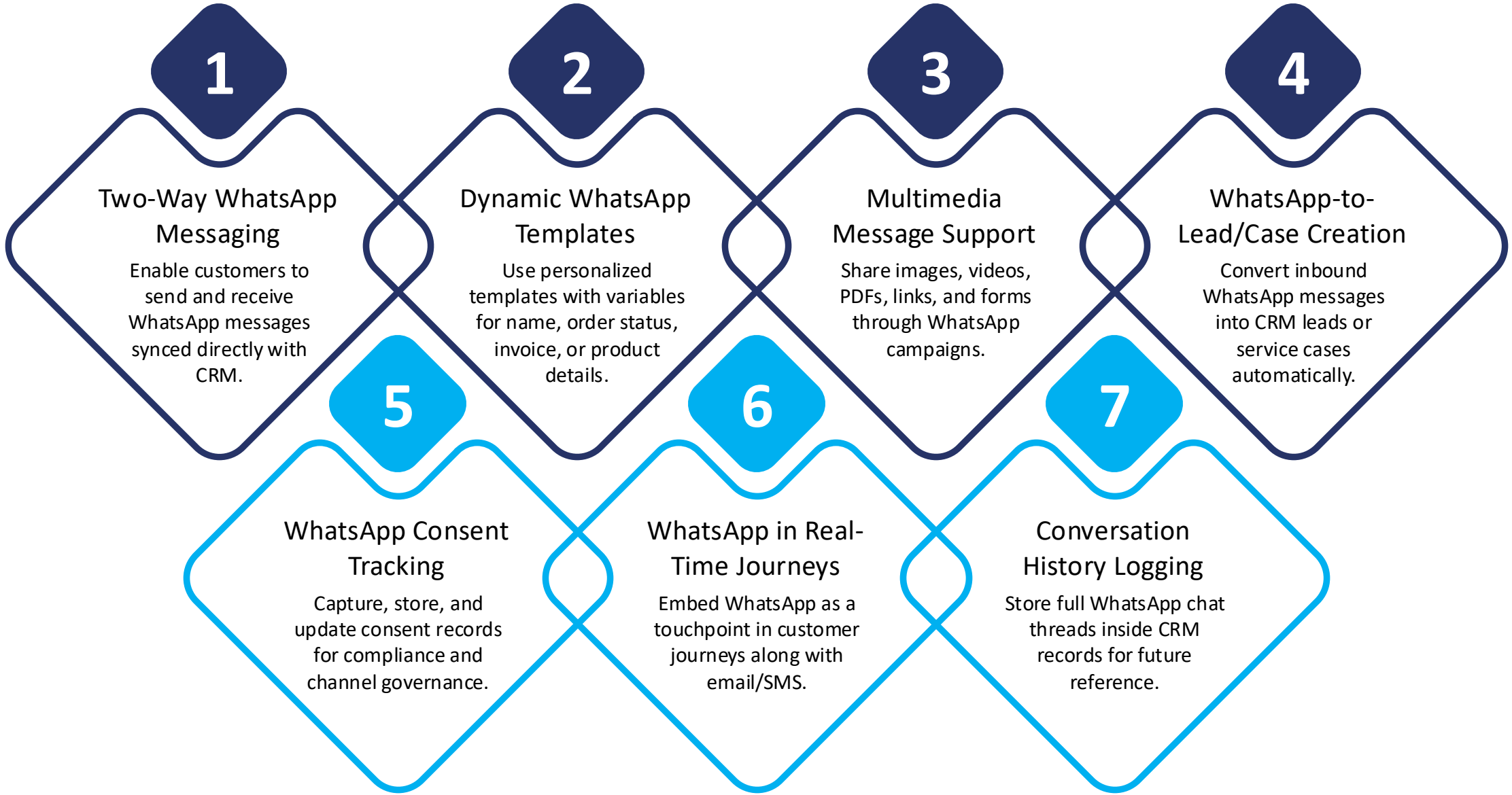
AI-Powered Features

- Predictive scoring for leads & customers
- AI-generated email content
- AI-optimized send times
- Customer churn prediction
- Behavioral segment creation with AI
- Product & content recommendations

Automation with AI + Power Automate

Automation with AI + Power Automate

- Intelligent email extraction
- Auto-population of fields
- AI-detected intent triggering workflows
- Predictive routing and process orchestration


1
Two-Way WhatsApp Messaging
Enable customers to send and receive WhatsApp messages synced directly with CRM.
2
Dynamic WhatsApp Templates
Use personalized templates with variables for name, order status, invoice, or product details.
3
Multimedia Message Support
Share images, videos, PDFs, links, and forms through WhatsApp campaigns.
4
WhatsApp-to-Lead/Case Creation
Convert inbound WhatsApp messages into CRM leads or service cases automatically.
5
WhatsApp Consent Tracking
Capture, store, and update consent records for compliance and channel governance.
6
WhatsApp in Real-Time Journeys
Embed WhatsApp as a touchpoint in customer journeys along with email/SMS.
7
Conversation History Logging
Store full WhatsApp chat threads inside CRM records for future reference.

Outlook Email Tracking

Track emails, attach them to CRM records, and create leads/contacts instantly.

Teams Collaboration on Deals

Collaborate on opportunities, quotes, and cases with Teams chats linked to CRM.

Teams-Based Approvals

Approve quotes or requests directly inside Microsoft Teams.

Mobile App with Offline Support

Access CRM data, create tasks, capture notes, and upload media even offline.

Meeting & Notes Sync

Automatically sync meeting notes and activities between CRM and Outlook/Teams.

Call Logging & Engagement

Log sales or service calls through the mobile app with geolocation capture.

01

Expense Capture in CRM

Submit expenses with attachments directly inside CRM.

02

Multi-Level Expense Approval

Approve or reject expenses based on pre-defined organizational workflows.

03

Project/Opportunity Expense Linking

Associate expenses with relevant opportunities, projects, or cases.

04

Reimbursement Workflow

Automate routing of approved expenses to Finance for reimbursement.

05

Expense Visibility Dashboards

Track reimbursed, pending, or rejected claims via dashboards.

Sales & Revenue Dashboards

Capture funding opportunities, create standardized grant records, and establish initial reporting dashboards.

Marketing Effectiveness Reporting

Enable staff to log hours, calculate labor costs, and track effort per grant.

Customer Service dashboards

Manage non-labor expenses, reconcile budgets, and monitor spending with alerts.

Customer 360 Profile

Generate invoices, attach supporting documents, upload vendor invoices, and ensure compliance.

Data Quality & Completeness Checks

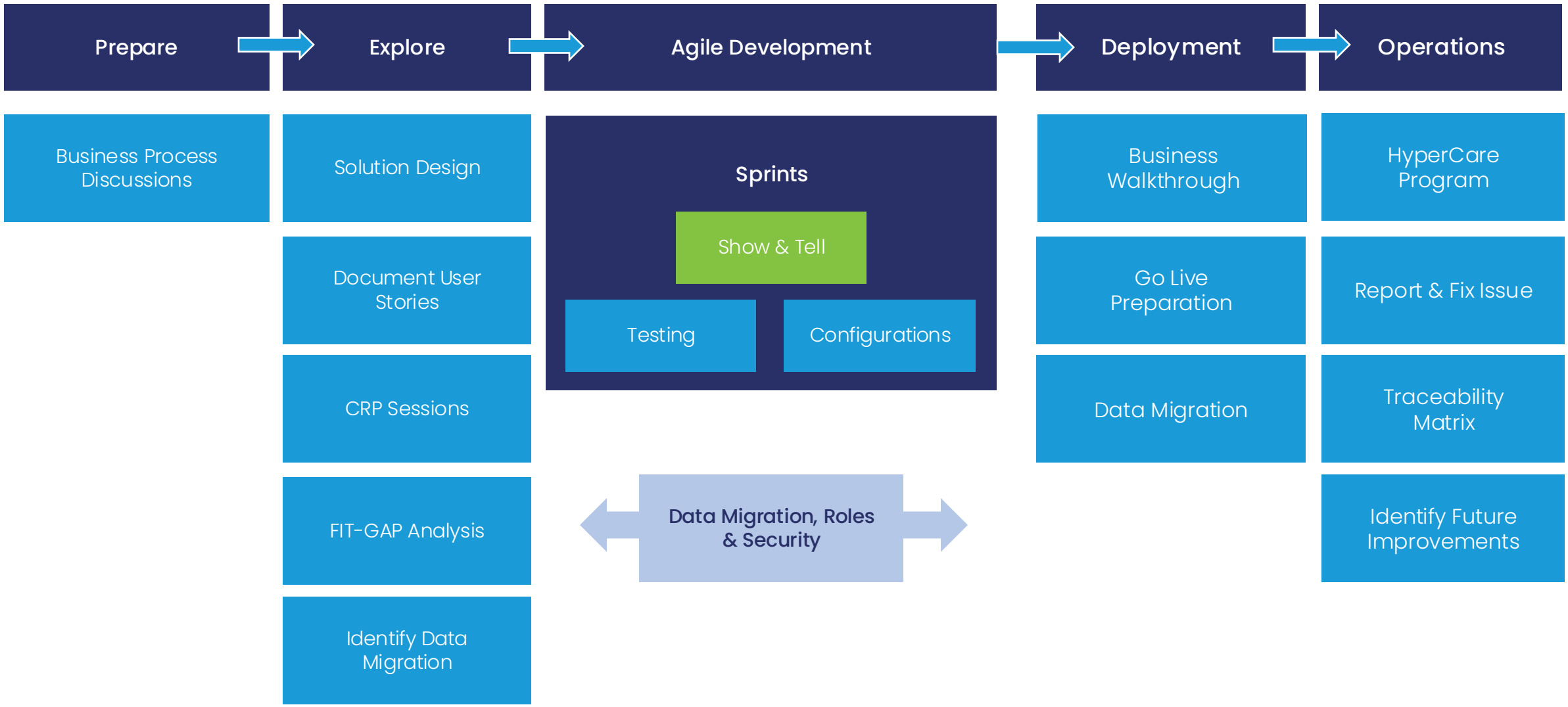
Maintain audit trails, automate federal reporting, and retain documentation for audits.

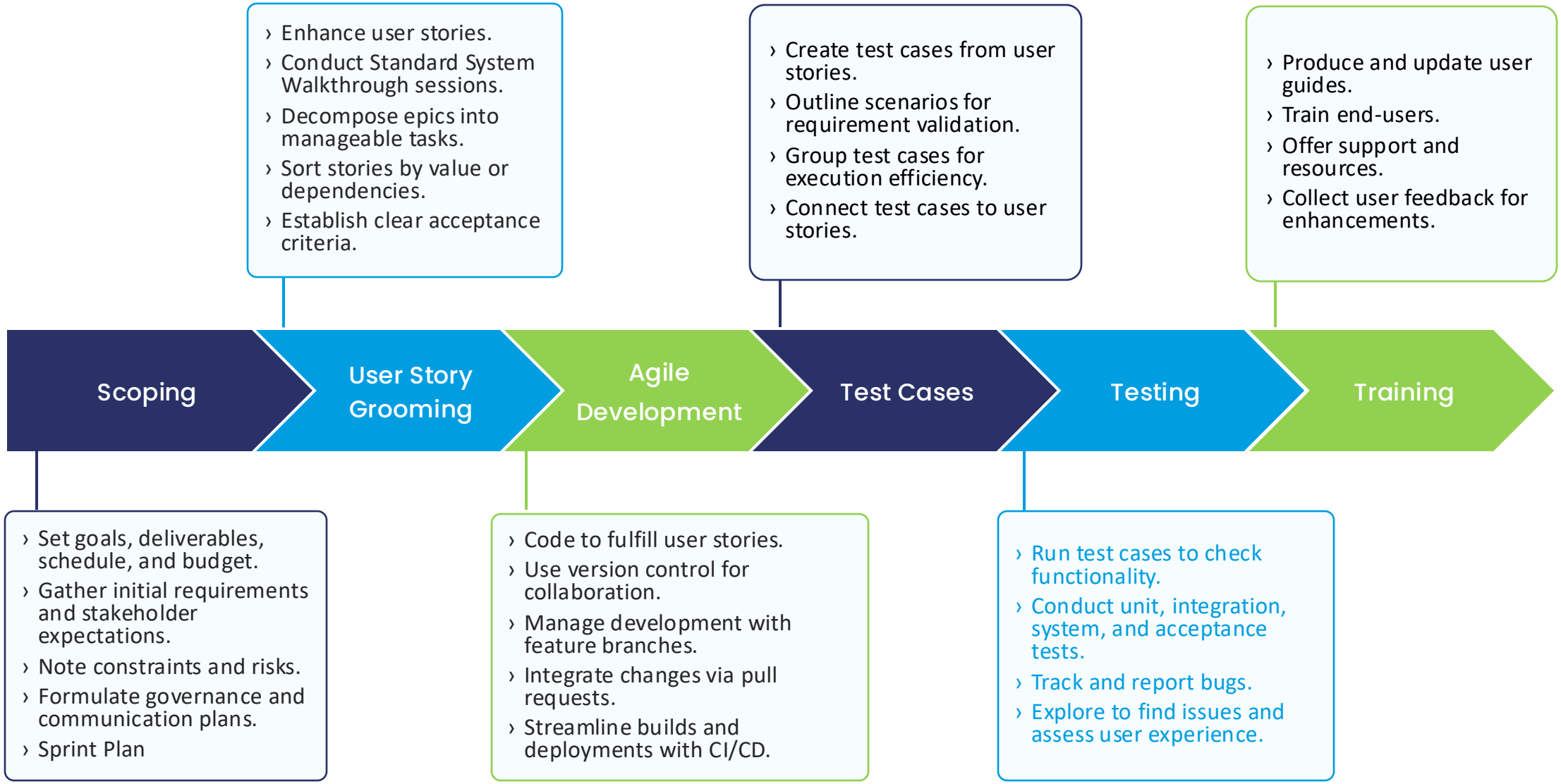
Adoption & Usage Analytics

Sync financial data with external systems for accurate reporting and reconciliation.

Predictive AI & Segmentation Insights

Provide role-based dashboards, forecasting, variance analysis, and actionable insights.


Prepare
Explore
Agile Development
Deployment
Operations
Business Process Discussions
Solution Design
Document User Stories
CRP Sessions
FIT-GAP Analysis
Identify Data Migration
Sprints
Show & Tell
Testing
Configurations
Data Migration, Roles & Security
Business Walkthrough
Go Live Preparation
Data Migration
HyperCare Program
Report & Fix Issue
Traceability Matrix
Identify Future Improvements


Scoping
User Story Grooming
Agile Development
Test Cases
Testing
Training
› Enhance user stories.
› Conduct Standard System Walkthrough sessions.
› Decompose epics into manageable tasks.
› Sort stories by value or dependencies.
› Establish clear acceptance criteria.
› Create test cases from user stories.
› Outline scenarios for requirement validation.
› Group test cases for execution efficiency.
› Connect test cases to user stories.
› Produce and update user guides.
› Train end-users.
› Offer support and resources.
› Collect user feedback for enhancements.
› Set goals, deliverables, schedule, and budget.
› Gather initial requirements and stakeholder expectations.
› Note constraints and risks.
› Formulate governance and communication plans.
› Sprint Plan
› Code to fulfill user stories.
› Use version control for collaboration.
› Manage development with feature branches.
› Integrate changes via pull requests.
› Streamline builds and deployments with CI/CD.
› Run test cases to check functionality.
› Conduct unit, integration, system, and acceptance tests.
› Track and report bugs.
› Explore to find issues and assess user experience.

Our Valued CRM Clients

1. Deep expertise across full Dynamics 365 CE stack
2. Strong track record in complex integrations
3. Specialisation in WhatsApp, CPQ, Portals & Incentive Systems
4. Advanced analytics & Customer Insights capability
5. Mature delivery method with enterprise documentation
6. High performing team: CE, Power Platform, Azure, BI, QA, DevOps
7. Scalable and customizable solutions built for long-term growth

DynaTech | Systems

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.

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