# 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 SOC 2 – AICPA Service Organization Control Reports – 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

DynaTech

# Microsoft Cloud Capabilities

## Cloud

Azure Infra
Azure Services
Logic Apps
Service Bus
Functions
Event Grid
API Management
Synapse Analytics
Load Testing
Data Factory

## Business Applications

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

## Low Code)

Power Pages
AI Builder
Power Apps
Power Automate
Copilot Studio

## Data & BI

Fabric
Dataverse
Power BI
Customer Insights
OneLake
Data Engineering
Copilot
Data Lake
Data Factory
Data Science
Data Warehouse
Lakehouse
Microsoft Purview
Real-Time Intelligence

DynaTech | Systems

# DynaTech
## Support Services

**Pratik Chitroda**

Delivery Head

**Mrunal Sharma**

Delivery Head

**Maulik Lakhani**

Delivery Head

## CE Team
## 100 Skilled Talent

- 34 — Dynamics 365 Sales
- 19 — Dynamics 365 Customer Service
- 7 — Dynamics 365 Field Service
- 4 — Dynamics 365 Project Operations
- 34 — BA
- 18 — Dynamics 365 Marketing

- 47 — Technical Consultants
- 37 — CE
- 12 — .net/ Integration
- 17 — Power Platform
- 3 — UI/UX

## Supported by

- Subject Matter Experts
- QA
- Testing Automation
- DevOps

## Products Covered

Microsoft Dynamics 365

Microsoft Power Platform

Microsoft Azure

APIs

## Customer Working Hours

- 24*7 Support plan
- One person dedicated available in case of outage

## Support and Incident Management

- Bugs
- Error
- Performance issues
- User support
- System Down
- Monitoring System Operation and Performance
- Incident management System
- L1, L2, and L3 support plan

## Proactive Monitoring and DevOps

We go the extra mile with proactive monitoring of:

- Business Processes/Operations
- System/Application Health, and
- Timely Deployment of updates through a robust DevOps process, ensuring your systems remain agile and up-to-date.

## Change Requests and New Developments

With DynaTech, you can rely on our expertise for managing:

- Change Requests
- New Reports
- User Onboarding
- Security Coaching
- Other development needs.

*Deployments using CI/CD Pipeline, New CR, Development will not be covered.*

### Managed Microsoft Services

Leverage our expertise in Dynamics 365, Power Platform, and Azure to drive your business to new heights.

### Support & Optimization

Stay bug-free and upgrade to the latest platform versions seamlessly with our expert assistance.

### 24x7 Support

Benefit from our L1, L2, and L3 support, ensuring prompt incident resolution and on-demand resources.

### Proactive Monitoring

We offer proactive and predictive monitoring of business processes, server infrastructure, and system health to keep you ahead.

### Trusted Growth Partner

DynaTech is your sole source for Dynamics 365, Microsoft 365, and Azure requirements, providing tailored solutions for your business needs.

## Version Upgrade Services

- Meticulous database export/import process
- Developer Instances for testing
- Comprehensive upgrades across system environments
- Seamless upgrades for SAT and production Instances
- Configuration of Environment and management
- Code Review and check-in process

## Developer Server Maintenance Tasks

We offer ongoing support for your developer servers, covering:

- VSTS Branch Creation
- Issue Troubleshooting
- IIS Restarts
- Database Log File Size Reduction

## Database Restore and Power BI Integration

Rely on our experts for:

- Seamless Database Refresh
- Import
- Visual Studio Get-Latest and Full build activities, keeping your data and system components up-to-date and efficient

## Release Management

Our experienced team ensures successful Releases:

- Planning
- Check list
- Environment readiness
- Meticulous implementation of methodology
- (Analysis, Design and Development, Test,
- Deploy, and Operate), and
- Timely deployment
- Back-up plan

## Power BI & BYOD Integration

Our team manages Azure rights, deploys reports, and integrates Synapse with D365. We also handle BYOD and Power BI integration.

## Initial Customer Onboarding

At DynaTech, we prioritize a seamless onboarding process, starting with clear and open communication.

Followed by the setup of generic system accounts at your domain and meticulous configuration of LCS and Azure DevOps projects.

- Kick-off and introduction
- High-level Business process workshop
- **Self studies**
    - Document, Server and DevOps review
    - Application Architect Overview
- Support Process and workflow establish
- Server, Security and Development Instances
- **Change Management**
    - Documentations and test process establish
- Review Open Items and priorities
- Task allocation and execution

## Prepare Dev Server

Trust us to handle the review and setup of your:

- Initial infrastructure
- Co-ordinate with Microsoft Azure for the procurement of required SKUs
- Deploy cloud-hosted environments (D13v2) for maximum efficiency

## BYOD Deployment & CI/CD

As part of our managed services, we facilitate BYOD prerequisites discussions, Fabric and server configurations, and package deployment automation through Azure DevOps pipelines and Fabric APIs, streamlining your development processes.

**Account Manager**

DynaTech's Director

**First Point of Contact**

Sr Functional Consultant - (Finance or SCM) - Dedicated

**Respective Team Members**

Dedicated/Scope Based

**Sr Technical Consultant**

Code Repository - Code Review - Dedicated DevOps Team

**SOP**

- Weekly Status Call
- Biweekly - Monthly Progress, Planning Call
- Task Assignment, Work Priority

Azure DevOps

Epic - User Stories

EPIC - CR/Bug/New Requests

- Scope, ETA and Estimation
- Task Assignment, Work Priority
- Done and Deployed at DynaTech Server
- Testing by Functional
- Deployed to Merge Server
- Showcase/Testing by Customer
- Done and Deployed to UAT
- Test Again
- Plan Deployment

## Services Under SLA

### The Incident Support Part of Managed Services

- Work halted on core application or severe business outage
- L1 Support Team
    - Work Impacted for many users or key business system functionality affected; No reasonable alternative
    - Errors
    - Performance issues
    - User Support, training and data entry issues
    - Bugs which impacts severe business outage
    - Urgent Deployment or Roll back
- Available on customer working hours

## SLA

| Support Level | Reaction/Response time | Business Systems Scenario |
|---|---|---|
| **Priority 1 (Critical)** | 15 Minutes | Work Halted on Core Application or Severe Business Outage |
| **Priority 2 (High)** | 1 Hour | Work Impacted for Many Users or Key Business System Functionality Affected; No Reasonable Alternative |
| **Priority 3 (Medium)** | 8 Hour | Work Impacted Down for Several Users, but Reasonable Alternative/Work Around Exists |
| **Priority 4 (Low)** | 24 Hour | Work Unaffected or Very Few Users Affected |
| **NO SLA** | Not covered under SLA | Planned Tasks, Trainings, Upgrades, Tasks Related to Development, Customization, Enhancement, New Implementation etc. |

## Services Not Under SLA

### Upgrades – Upgrade to the Latest Version of the Platform and

### Stay Bug-free

### Dynamics and Azure System Health Checkups

### Deployments, DevOps Management

- Weekend support for Deployment

### The Incident Support Part of Managed Services

- Work impacted down for several users, but reasonable alternative/work around exists
- Work is assigned based on Queue
- Not specific to customer time zone

### Ticket Requests

- Tickets with research/analysis needs
- Change requests
- New Developments
- New Reports
- New User onboarding
- New User Training, Scheduled Training Sessions
- Security, Coaching, Support
- Proactive and predictive monitoring of business processes
- Constant and on-time deployment of system updates
- DevOps Code review, testing, and deployment

### Scale and Growth

- Review Process with SMEs and Users
- Suggestions for optimizations and Change requests
- POC of New Features, new relevant Products

# System Audit

### Review D365 Environments

- DevOps
- Versions
- Servers
- Status - alignments
- Add-ons
- Customizations

### Setups

- Company
- BPF
- Teams
- Modules
- Features
- Parameters

### Documentation

- Review user stories.
- Review user manuals and videos in all available formats.
- Consult with IT, PMO, and leadership to understand KPIs.
- Compare with existing mappings.
- Create a comparison/understanding document.
- Ask questions.
- Document open questions for users.

### Processes

**Masters**

- Item/Vendor/Customer/Pricing/Other Groups

**Transactions Set Ups**

**Transactions Test Data**

**Workflows**

**Custom Processes/Fields/Setups**

**Security Configuration/Licensing**

### Prepare/update System progress Report with below matrix

**Status of List of Features**

- Status of Features/customizations/Test scenario set ups

**Status on User Understanding**

- Test cases preparation
- User awareness
- Training

## System Setup Status Summary

| | |
|---|---|
| | Done |
| | incomplete |
| | Missing |

**System Setup Summary**

| Sr. Number | Modules/Feature | Applicable or in Use | Parameter + setup | Basic Master data and setup | Workflow, Alert configuration | Test Cases / Trasnactions Data |
|---|---|---|---|---|---|---|
| 1 | General Ledger | | | | | |
| 2 | Chart of account | | | | | |
| 3 | Account Strucute | | | | | |
| 4 | Procurement Policy | | | | | |
| 5 | Account Payable | | | | | |
| 6 | Purchase Order Approval | | | | | |
| 7 | Vendor Payment Proposal | | | | | |
| 8 | Account Receivable | | | | | |
| 9 | Inventory Management | | | | | |
| 10 | Inventory Journals | | | | | |
| 11 | Sales Management | | | | | |
| 12 | Cash and Bank | | | | | |
| 13 | Fixed Asset | | | | | |
| 14 | Production Management | | | | | |
| 15 | Service Management | | | | | |
| 16 | etc.. | | | | | |

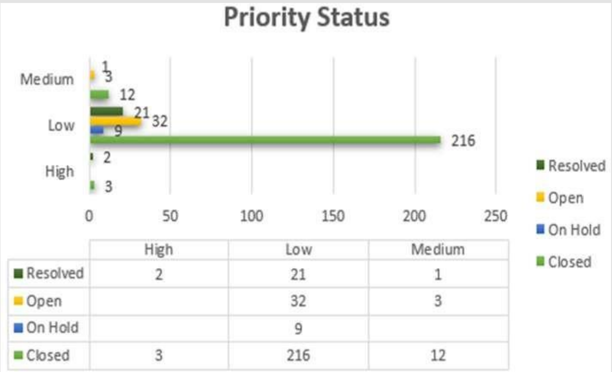
## User Audit Summary

| | |
|---|---|
| | Complete |
| | In Process |
| | Pending |

**User Audit summary**

| Department / Function | Key User Name | Do User possess D365 System Capability Knowledge? | Does User know all Scope / Current Requirement ? | Is Design and Process Mapping understood? | Does User have confirmed all Test Cases? | Is User have received Training? | Do User is aware of System Setup, Configuration and Master data | Does user have executed basic system Testing? | Does User have executed all test cases? | Does User have completed and Signonff on UAT? | Can user find relarted data or query in system? |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Accounting Team | Peter Walz | | | | | | | | | | |
| Accounting Team | Mark Keim | | | | | | | | | | |
| Cash and Bank Team | Nick Turley | | | | | | | | | | |
| Procurement Team | | | | | | | | | | | |
| Dispatch Team | | | | | | | | | | | |
| Assemb Department | | | | | | | | | | | |

| Milestones | Legal Entity | Business Units | Start Date / Tentative Start Date | Go Live Date / Tentative Go Live Date | Status |
|---|---|---|---|---|---|
| Wave 1 | SHS | IT (Non-PO), Finance & Shared Services | 30 Oct’22 | 10th July’23 | |
| Wave 2 | SHS | Other Corp Functions & IT POs | 10th July’23 | 13th Sept’23 | |
| Wave 3 | FLD & IDS | All FLD & IDS | 14th Sept’23 | 20th Oct’23 | |




Roll-Up Board

| New | Approved 1/10 | Development 6/12 | | Code Review 1/5 | | QA (UAT/PreProd/PreProd2) 0/10 | | In Production (Resolved) 0/10 | Closed (LIVE) |
|---|---|---|---|---|---|---|---|---|---|
| | | Doing | Done | Doing | Done | Doing | Done | | |
| 26 | 1 | 3 | 3 | 1 | 0 | 0 | 0 | 0 | 451 |

## DevOps User Story Audit

| ## | Modules/Feature | In Use | Parameters & Setup | Basic master data and setup | Workflow & Alert Rule | Transactional Data | Feature Rating (1 low, 5 High) | Module Rating (1 low, 5 High) |
|---|---|---|---|---|---|---|---|---|
| 1 | **General Ledger** | | | | | | | 4 |
| 1.1 | Chart of Accounts | Yes | Completed | Completed | NA | NA | 4 | |
| 1.2 | Main Account Categories | Yes | Completed | Completed | NA | NA | 4 | |
| 1.3 | Financial Dimension | Yes | Completed | Completed | NA | NA | 4 | |
| 1.4 | Accounting Structure | Yes | Completed | Completed | NA | NA | 4 | |
| 1.5 | Advance Rule | No | NA | NA | NA | NA | 0 | |
| 1.6 | General Journal | yes | Completed | Completed | Completed | Completed | 4 | |
| 1.7 | Periodic Journal | Yes | Completed | Completed | NA | Completed | 1 | |
| 1.8 | Allocation Journal | Yes | Completed | Completed | NA | Completed | 1 | |
| 1.9 | Management Reporter | No | Pending | Pending | NA | Pending | 1 | |

## General Ledger - System Findings

## General Ledger - User Findings

| **User Audit Summary** | **GL Accounting – Finance** |
|---|---|
| Are users aware of all current scope and requirements? | 100% |
| Do users possess knowledge of D365 standard system capabilities? | 85% |
| Is the design and process mapping understood by users? | 85% |
| Are current requirements being same after the original scope was defined? | 85% |
| Are users familiar with system setup, integration, configuration, and master data? | 70% |
| Have users received and confirmed all listed test cases? | 0% |
| Have users received training documents or step-by-step instructions? | 0% |
| Have users received training on the system? | 75% |
| Have users executed basic system testing? | 70% |
| Have users executed all of the test cases? | 0% |
| Have users completed User Acceptance Testing (UAT) or CRP (Conference Room Pilot) and signed off on CRP? | 0% |
| Can users easily locate related data in the system? | 20% |
| Do users have a clear understanding of the process flow between departments? | 60% |

| ## | Modules/Feature | In Use | Parameters & Setup | Basic master data and setup | Workflow & Alert Rule | Transactional Data | Feature Rating (1 low, 5 High) | Module Rating (1 low, 5 High) |
|---|---|---|---|---|---|---|---|---|
| **4** | **Credit & collections** | | | | | | | 2 |
| 4.1 | Credit Limit configured | Yes | Completed | Partial | NA | NA | 3 | |
| 4.2 | Interest Configuration | Yes | Completed | Completed | NA | NA | 3 | |
| 4.3 | Interest Journal | Yes | Yes | Yes | NA | No | 1 | |
| 4.4 | Credit Management Workflow | No | Not set | Not set | Not Set | No | 1 | |

## Credit & Collections - System Findings

## Credit & Collections - User Findings

| **User Audit Summary** | **Credit and Collections** |
|---|---|
| Are users aware of all current scope and requirements? | 70% |
| Do users possess knowledge of D365 standard system capabilities? | 40% |
| Is the design and process mapping understood by users? | 50% |
| Are current requirements being same after the original scope was defined? | 50% |
| Are users familiar with system setup, integration, configuration, and master data? | 30% |
| Have users received and confirmed all listed test cases? | 0% |
| Have users received training documents or step-by-step instructions? | 0% |
| Have users received training on the system? | 45% |
| Have users executed basic system testing? | 45% |
| Have users executed all of the test cases? | 0% |
| Have users completed User Acceptance Testing (UAT) or CRP (Conference Room Pilot) and signed off on CRP? | 0% |
| Can users easily locate related data in the system? | 20% |
| Do users have a clear understanding of the process flow between departments? | 35% |

**Account Manager**

DynaTech's Director

**First Point of Contact**

Sr Functional Consultant - (Finance or SCM) - Dedicated

**Respective Team Members**

Dedicated/Scope Based

**Sr Technical Consultant**

Technical Architect

Code Review

**SOP**

- Weekly Status Call
- Biweekly - Monthly Progress, Planning Call
- Task Assignment, Work Priority

**Team**

- D365 Marketing + Sales - 2
- D365 Sales + Customer Service - 1
- QA - 1

Azure DevOps

Epic - User Stories

EPIC - CR/Bug/New Requests

- Scope, ETA and Estimation
- Task Assignment, Work Priority
- Design and Test Cases
- Testing by Functional
- Training
- Showcase/Testing by Customer
- Done and Deployed to UAT
- Test Again
- Plan Deployment

## Scoping

- Set **goals, deliverables, schedule, and budget.**
- Gather initial requirements and stakeholder expectations.
- Note **constraints and risks.**
- Formulate governance and communication plans.
- **Spring Plan**

## User Story Grooming

- Enhance user stories.
- Decompose epics into **manageable tasks.**
- Sort stories by value or dependencies.
- Establish clear acceptance criteria.

## Development

- 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.**

## Test Cases

- Create test cases from user stories.
- Outline scenarios for requirement validation.
- Group test cases for execution efficiency.
- Connect test cases to user stories.
- Apply **test automation** when possible.

## Testing

- Run test cases to check functionality.
- Conduct unit, integration, system, and acceptance tests.
- Track and report bugs.
- Perform **regression tests.**
- Explore to find issues and assess user experience.

## Training

- Produce and update **user guides.**
- Train end-users.
- Offer **support and resources.**
- Collect user feedback for enhancements.

GMT +7

GMT +3

GMT +5:30

GMT +0 TO +4

GMT -5 TO 10

### 1. Does DynaTech Focus only on Microsoft Technologies?

Yes, but we have partnered with local companies to work with support on domain like, AWS, SAP, E-commerce platforms, .net, java, react etc.

### 2. Does DynaTech have experience in Migration to Azure?

Yes.

### 3. What are the different types of Managed Services DynaTech provides?

As per the presentation, customer can select;

1. Products
2. Services
3. Managed service program to configure right Managed Service for them self.

### 4. How do you charge for the Managed Services Pay-As-Go/Total package deal?

It is based on 3, how and what you choose.

### 5. Are the SLAs changeable or built-in?

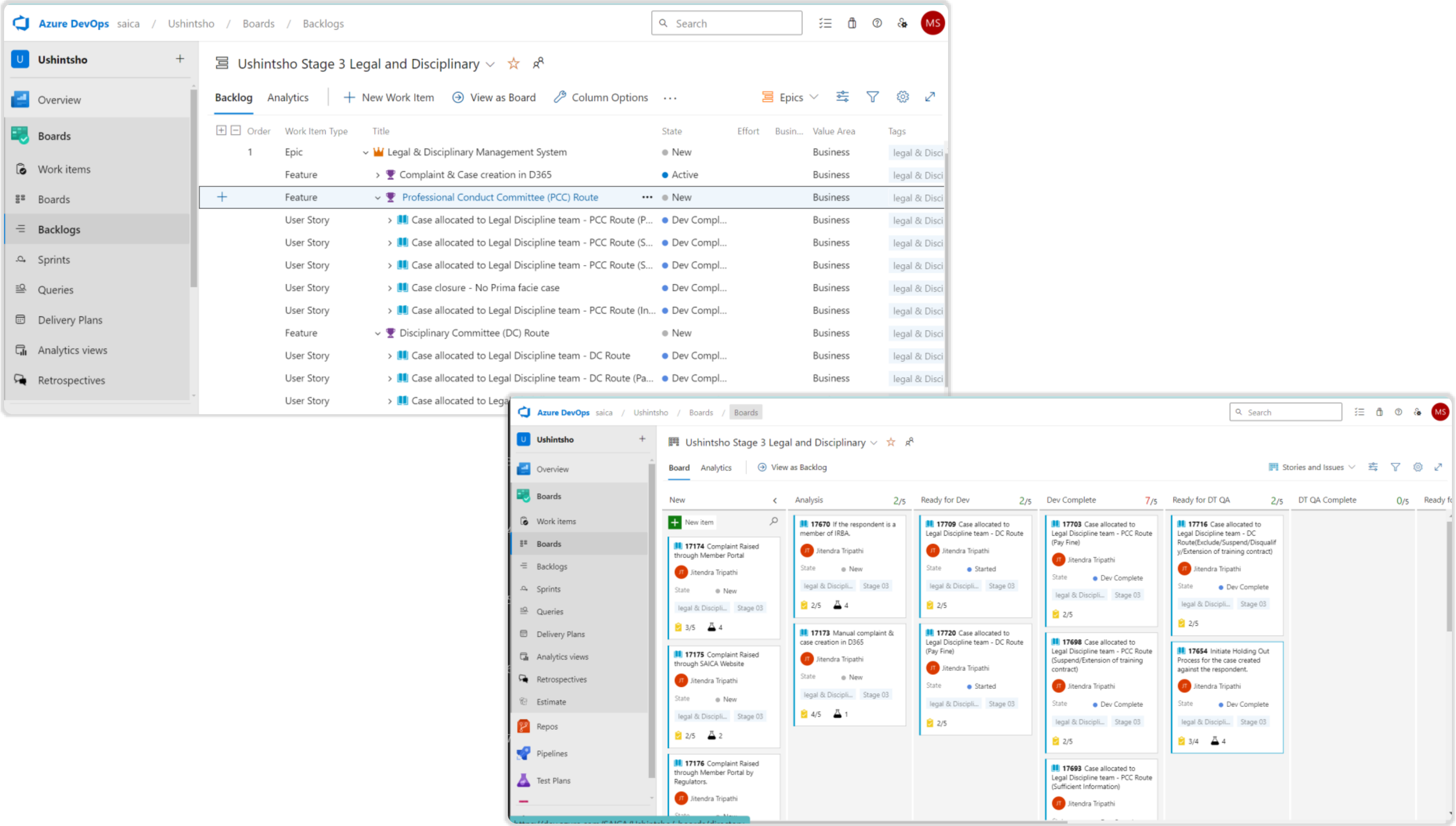
Yes, it is configurable based on customer needs.

### 6. Does DynaTech support all services of D365?

Yes.

DynaTech | Systems

## Scoping




- Set **goals, deliverables, schedule, and budget.**
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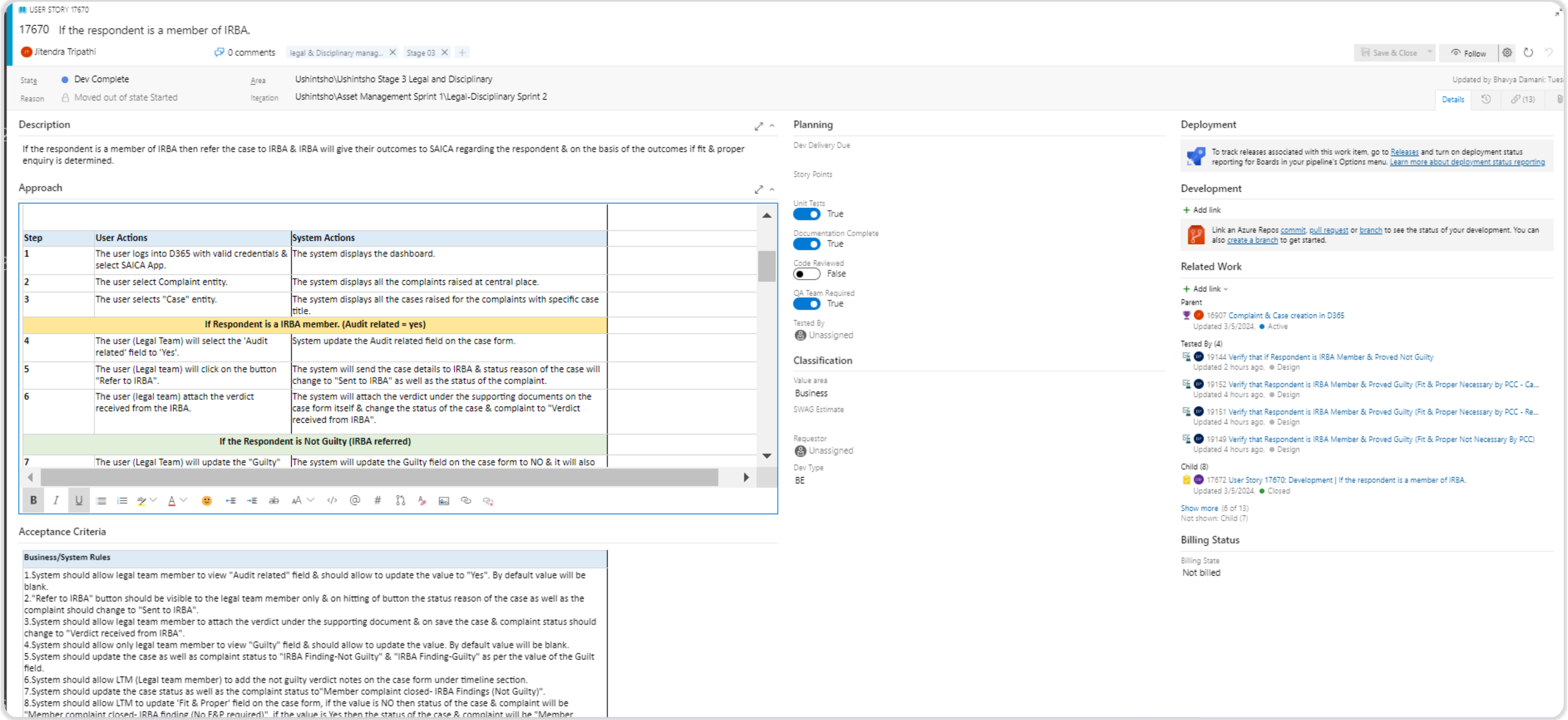
- Note **constraints and risks.**
- Formulate governance and communication plans.
- **Spring Plan**

**Scoping**

## User Story Grooming




### User Story Grooming

- Enhance user stories.
- Decompose epics into **manageable tasks.**
- Sort stories by value or dependencies.
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## Development

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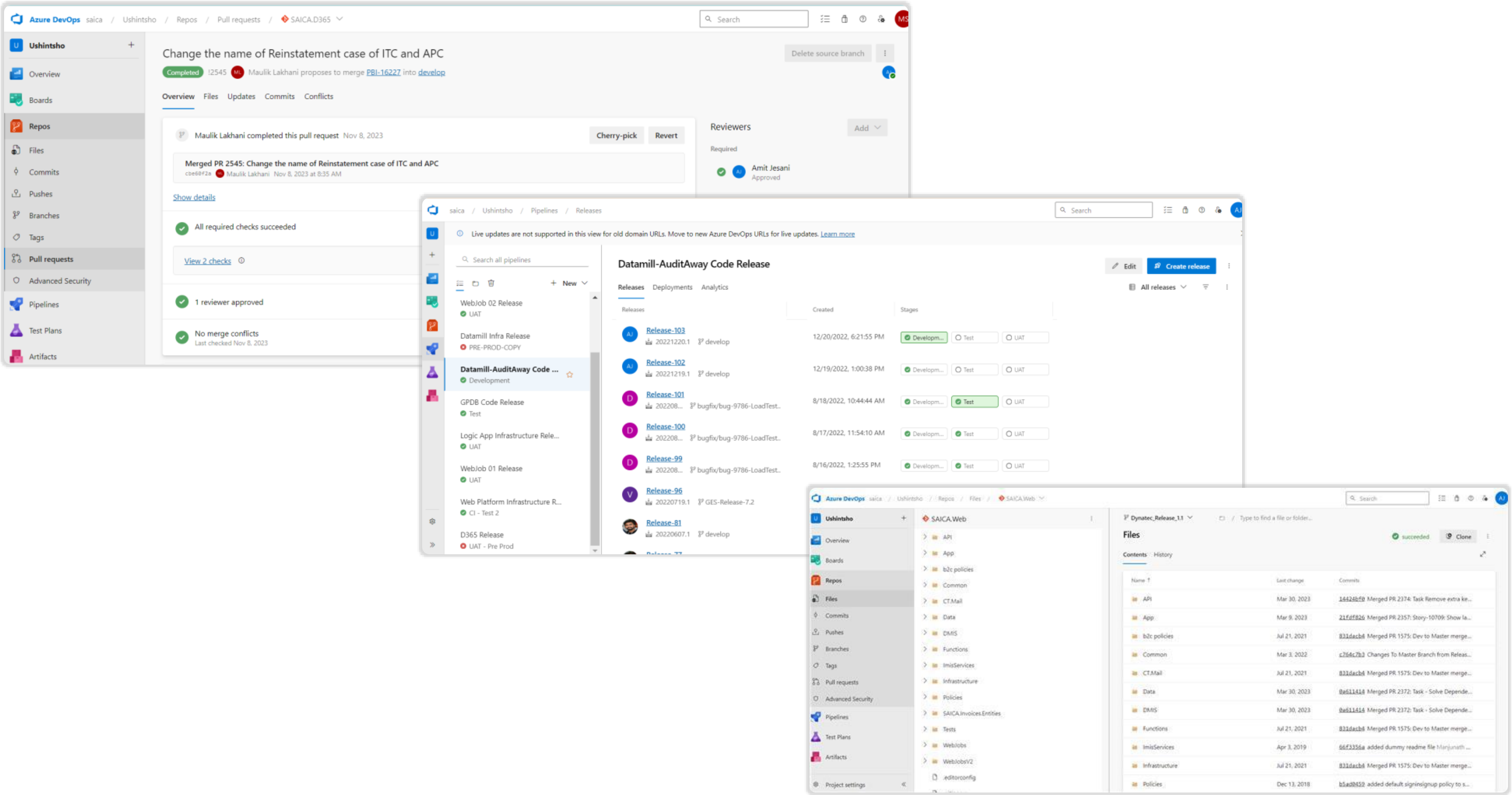
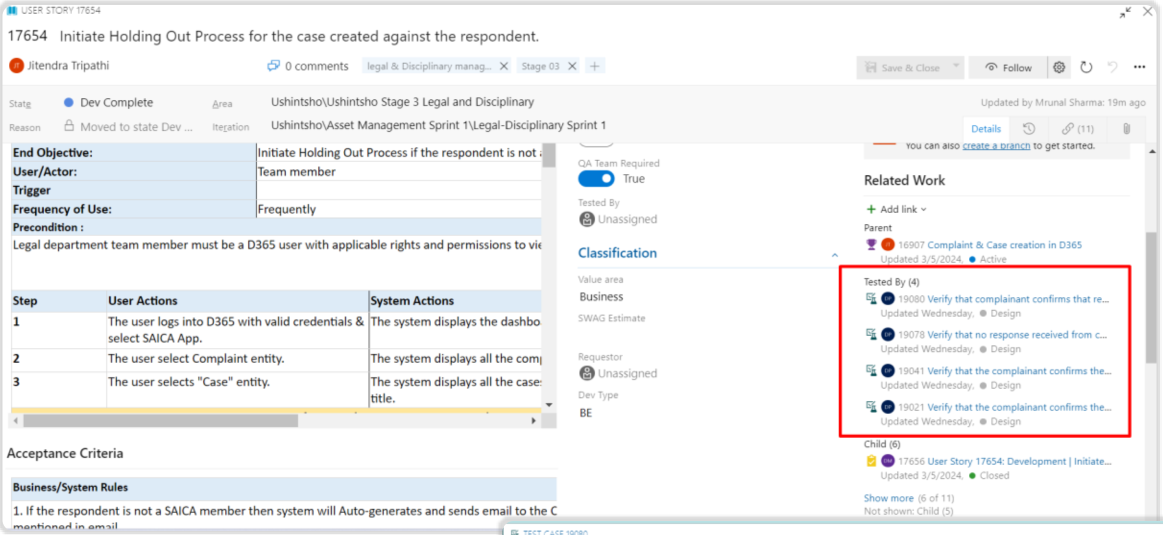
**Development**

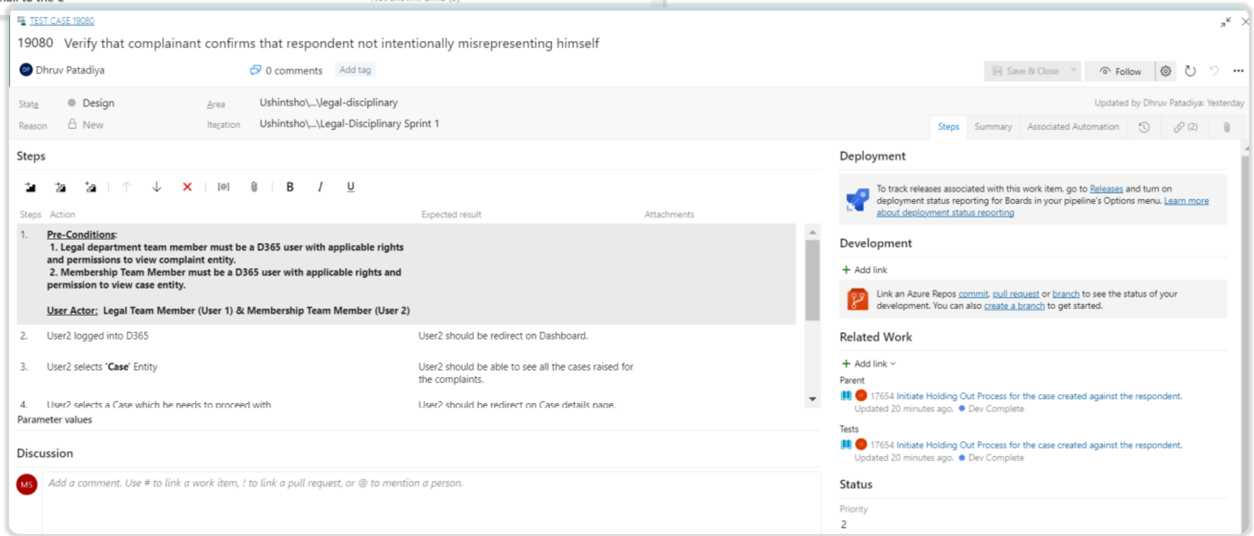


# Test Cases

## Test Cases

- Create test cases from user stories.
- Outline scenarios for requirement validation.
- Group test cases for execution efficiency.
- Connect test cases to user stories.
- Apply **test automation** when possible.



# Training Materials (User Manual)

## Training

- Produce and update **user guides.**
- Train end-users.
- Offer **support and resources.**
- Collect user feedback for enhancements.

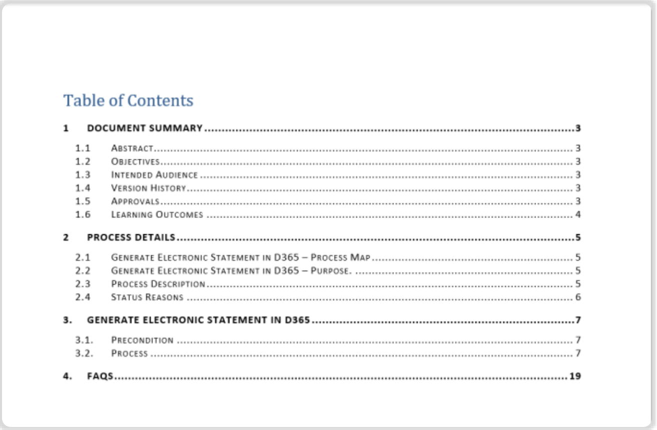
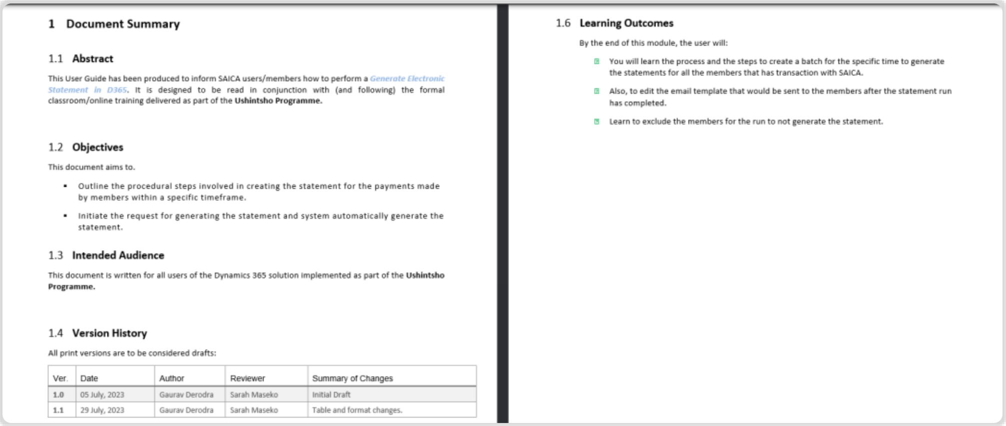


Table of Contents





1 Document Summary

1.1 Abstract

This User Guide has been produced to inform SAICA users/members how to perform a *Generate Electronic Statement in D365*. It is designed to be read in conjunction with (and following) the formal classroom/online training delivered as part of the **Ushintsho Programme.**

1.2 Objectives

This document aims to.

- Outline the procedural steps involved in creating the statement for the payments made by members within a specific timeframe.
- Initiate the request for generating the statement and system automatically generate the statement.

1.3 Intended Audience

This document is written for all users of the Dynamics 365 solution implemented as part of the **Ushintsho Programme.**

1.4 Version History

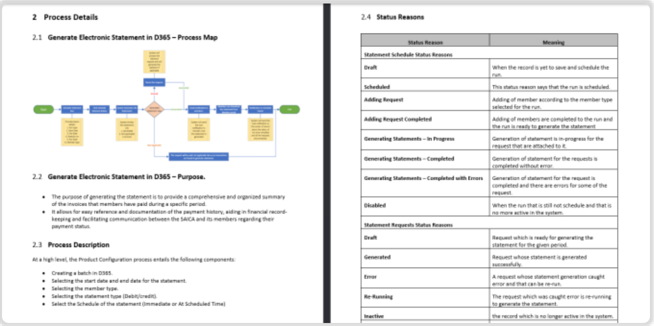
All print versions are to be considered drafts:

| Ver. | Date | Author | Reviewer | Summary of Changes |
|---|---|---|---|---|
| 1.0 | 05 July, 2023 | Gaurav Derodra | Sarah Maseko | Initial Draft |
| 1.1 | 29 July, 2023 | Gaurav Derodra | Sarah Maseko | Table and format changes. |

1.6 Learning Outcomes

By the end of this module, the user will:

- You will learn the process and the steps to create a batch for the specific time to generate the statements for all the members that has transaction with SAICA.
- Also, to edit the email template that would be sent to the members after the statement run has completed.
- Learn to exclude the members for the run to not generate the statement.



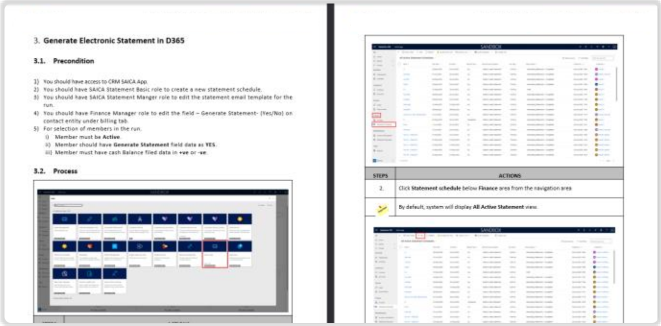
2 Process Details

2.1 Generate Electronic Statement in D365 – Process Map

2.2 Generate Electronic Statement in D365 – Purpose.

2.3 Process Description

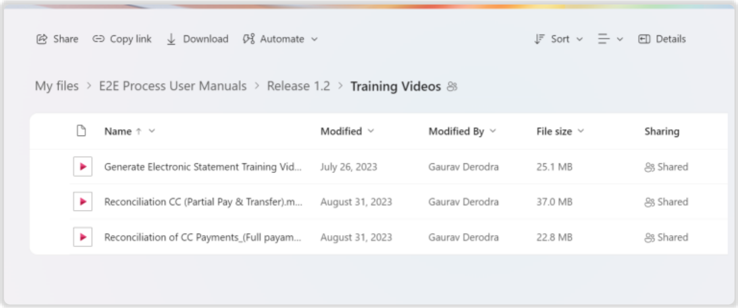
2.4 Status Reasons



3. Generate Electronic Statement in D365

3.1. Precondition

3.2. Process





| Name | Modified | Modified By | File size | Sharing |
|---|---|---|---|---|
| Generate Electronic Statement Training Vid... | July 26, 2023 | Gaurav Derodra | 25.1 MB | Shared |
| Reconciliation CC (Partial Pay & Transfer).m... | August 31, 2023 | Gaurav Derodra | 37.0 MB | Shared |
| Reconciliation of CC Payments_(Full payam... | August 31, 2023 | Gaurav Derodra | 22.8 MB | Shared |


Ushintsho
Open to Change
Generate Electronic Statement
SAMPLE


Ushintsho
Open to Change
SAMPLE
Reconciliation of CC Payments


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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