



Accelerate Business

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.



150+

Global Projects

100+

Happy Clients

450+

Expert Minds

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

Membership and Association Management



Association Governance & Leadership





Transform Association Governance & Community Oversight

DynaTech's Association Management capabilities empower associations, societies, and membership-driven organizations to streamline operations, support governance, and foster stronger community engagement.

01

Chapters, Groups & Committees

Manage chapters, regions, and special interest groups with leadership tracking, community engagement, and reporting.



02

Clubs & Community Structures

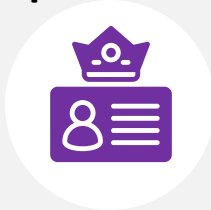
Allow members to form clubs or request new communities aligned with shared goals.



03

Corporate & Institutional Memberships

Register organizations, manage employee accounts, assign membership plans, and track renewals.



04

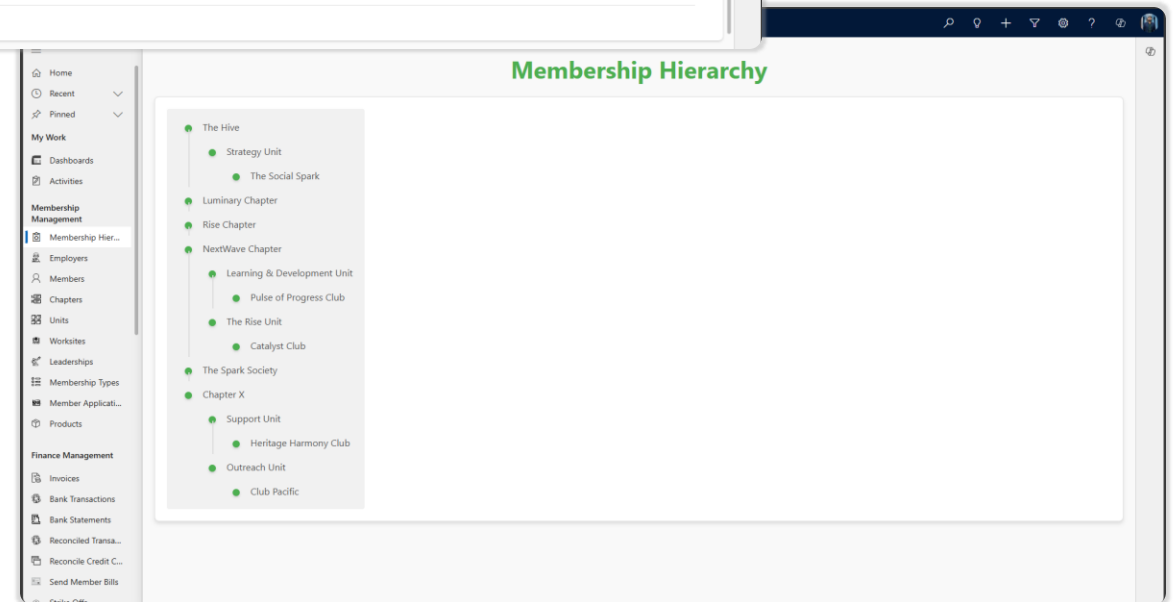
Performance Dashboards

Monitor growth, engagement, and financial health of chapters and groups with Power BI.



- › Create and manage chapters by geography, interest, or institution
- › Assign members manually or auto-assign via rules (postal code, interest)
- › Allow members to browse & join chapters via portal
- › Assign/update chapter leaders with portal access
- › Monitor chapter growth, engagement, and financials with dashboards
- › Deactivate/archive inactive chapters for clean governance

The screenshot shows the Dynamics 365 Membership Management interface. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Dashboards, Activities, Membership Management, Membership Hierarchy, Employers, Members, Chapters, Units, Workspaces, Leaderships, Membership Types, Member Applications, and Products. The main content area is titled 'RN-1000 - Saved Chapter' and has tabs for General, Member Details, and Related. The General tab is active, showing fields for Chapter Number (RN-1000) and Chapter (Chapter X). Below these are two tables. The first table, titled 'District', has columns for Unit Number, Unit, Chapter Name, and District Status. It contains two rows: DT-1007 (Support Unit, RN-1000, Active) and DT-1008 (Outreach Unit, RN-1000, Active). The second table, titled 'Leadership', has columns for Leadership ID, Leader, Start Date, End Date, and Leadership Type. It contains one row: RL-1000 (James Butler, 7/1/2025, 7/31/2025, Leadership Type).



1

› Create and configure groups (committees, task forces, SIGs)

2

› Assign or invite members through CRM or portal

3

› Members can discover & request to join groups via portal

4

› Enable collaboration with group pages, events, and shared documents

5

› Track group performance & activity with dashboards

1

› Register and manage corporate, academic, or non-profit organizations

2

› Add and manage employees under parent organization

3

› Assign membership plans with entitlements and seat limits

4

› Simplify renewals with reminders, invoices, and online payments

5

› Provide engagement & usage reporting at organizational level

- › Create and manage member-run clubs (hobby, professional, social)
- › Members can propose new clubs for admin approval
- › Browse and join clubs via portal directory
- › Club leaders manage announcements, events, and documents
- › Monitor club activity and flag dormant clubs for review

The screenshot displays the Dynamics 365 Membership Management interface. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Dashboards, Activities, Membership Management, Membership Hier..., Employers, Members, Chapters, Units, Worksites, Leaderships, Membership Types, Member Applicati..., Products, Finance Management, Invoices, Bank Transactions, Bank Statements, Reconciled Transa..., Reconcile Credit C..., Send Member Bills, Strike Offs, Write-Offs, write-off selections, Payment Arrange..., Export FNBs, and Receipt of Payme... The main content area is titled 'WI-0001 - Saved Worksite' and shows the 'General' tab. The 'Basic Information' section includes fields for Worksite ID (WI-0001), Club Number (CLB-001), Club Name (Club Pacific), Worksite Unit Name (DT-1000), Worksite Division, Worksite Area, Worksite Status (Active), Worksite Renewal Status, Worksite Charter Date, Worksite Suspended Date, and Worksite Closed Date. The 'Contact Information' section includes fields for Primary Contact (Anita Clouds), Primary Email (Maxjohn2@yahoo.com), Business Phone (09890987897), Facebook, and Website.

Membership Experience & Lifecycle





Deliver a Seamless Member Journey

Modernize the member lifecycle from onboarding to renewal with automation, personalization, and robust self-service.

Digital membership forms, automated workflows, and configurable membership types



Application & Approval

Flexible dues structures with monthly, annual, and lifetime options



Membership Plans

Automated reminders, recurring billing, and discount options



Renewals & Auto-Billing

Secure membership IDs and recognition badges



Digital ID Cards & Badging

Self-service communication and interest preferences



Member Preferences

Centralized portal for renewals, benefits, events, and certificates



Member Portal

Billing, refunds, discounts, and F&O integration



Financial Management

Retention, churn, and renewal KPIs with predictive insights



Analytics

- › Online application forms with secure payment integration
- › Auto-routing to CRM for review & approval workflows
- › Notifications to applicants and admins at each step
- › Reduced manual effort with transparent audit trail
- › Smooth onboarding with minimal delays

Dynamics 365 | Association & Membership Management

SANDBOX

MEM-APP-0057 - Saved
Membership Application

General Membership Payments Related

Form assist

Personal Details

Application ID MEM-APP-0057 Date of Birth 10/12/1981

Full Name Albert James Applicant Albert James

Contact Information

Email Address jfalev94@binafex.com State Free State

Phone Number 3453455344 ZIP/Postal Code 0047

Street Eldorado Street Country India

City ELARDUSPARK EXT 18

Supporting Document

Timeline

Enter a note...

Recent

Modified on: 10:17 AM

Note modified by R # Portals-Demo01

Uploaded Supporting Document

Uploaded via Power Pages form.

Dynamics 365 | Association & Membership Management

SANDBOX

MEM-APP-0057 - Saved
Membership Application

General Membership Payments Related

Form assist

Modified on: 10:17 AM

Note modified by R # Portals-Demo01

Uploaded Supporting Document

Uploaded via Power Pages form.

Supporting file delete.pdf

View more

Membership Details

Membership Type CORPORATE Membership Period Monthly Membership

Membership Plan CORP-PLAN-007

Consent and Agreements

Terms and Conditions ☒

Privacy policy ☒

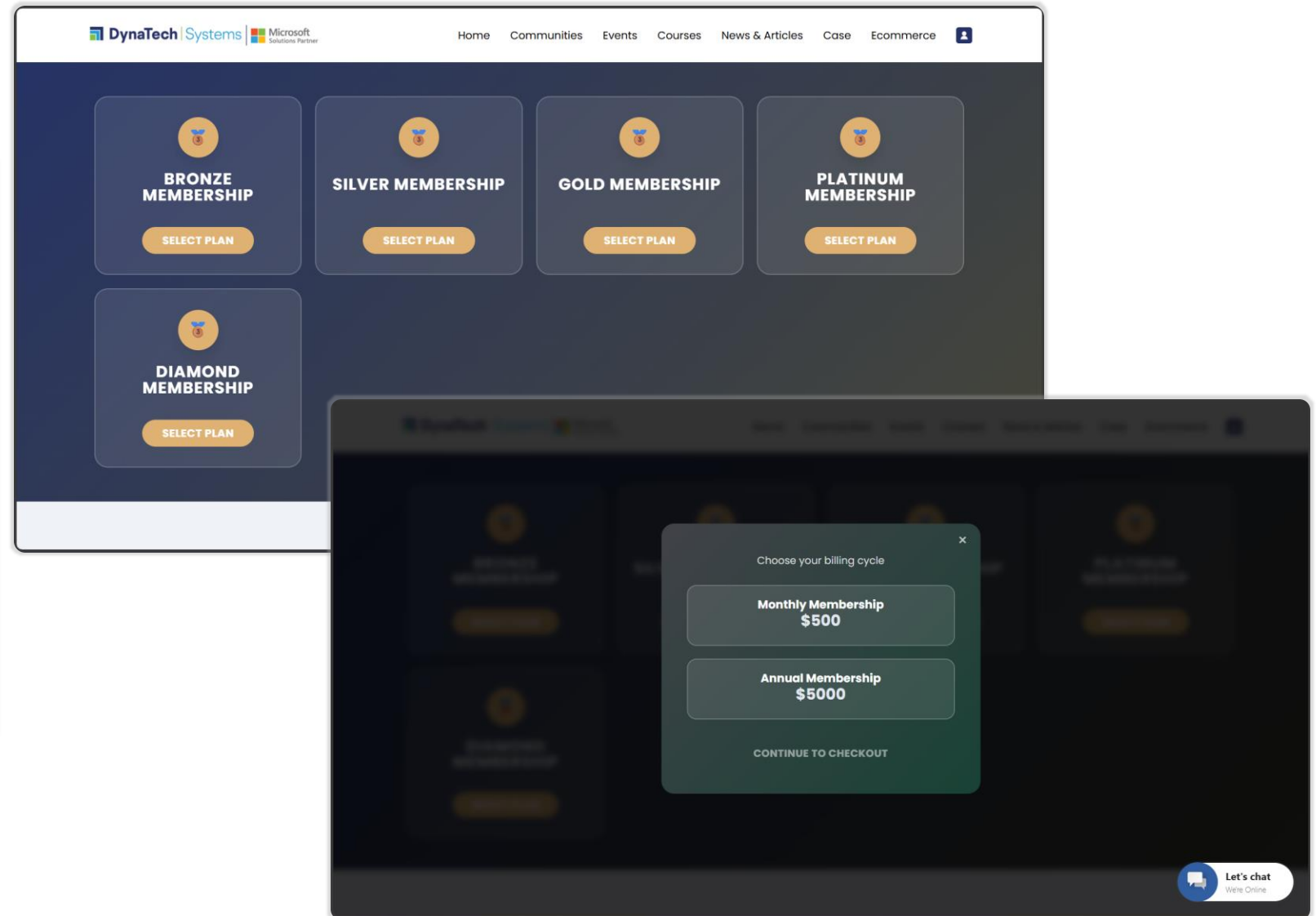
Administration

Application Status Submitted Submission Date 9/3/2025 10:17 AM

Reviewed By --- Review Date ---

Rejection Reason --- Owner # Portals-Demo01

- › Multiple types: Individual, Corporate, Student, Lifetime
- › Plan options: Monthly, Annual, Lifetime, Custom
- › Auto-assignment of entitlements and benefits
- › Approval workflows tailored by membership type
- › Members can request type/plan changes via portal



- › Automated renewal reminders at configurable intervals
- › Auto-billing with stored payment methods
- › Automated invoice creation and reconciliation
- › Grace period handling with auto-notifications
- › Compliance-ready reporting with audit logs

The screenshot displays the Dynamics 365 SAKA App interface for a 'CA SMB - 00001' Billing Run. The interface is divided into three main sections:

- Left Sidebar:** Contains navigation options under 'Applications' (CA Membership, AGA Membership, GAA Membership, ATISA Membership, Register Practices, Concession Appl., Practice Renewals, Register Tax Pract., Portal TP Deregist.) and 'Finance' (Send Member Bills, Penalty Runs, Invoices, Receipt EFT Paym., TCMS Invoices, Bank Transactions, Reconcile Credit C., Reconciled Trans., Write-Off Selection, Write-Off).
- Main Content Area:**
 - Header:** 'CA SMB - 00001 - Saved' with a 'Dispatch to FO Completed' status and 'John Sibanyoni' as the owner.
 - Tabs:** General, Selected Members, Unselected Members, Invoices, Move To Fo Fail Invoices, Errors, Related.
 - Summary:** Total Members Count: 50, Total Number of Eligible Members: 47, Last updated: 2025/09/03 19:13.
 - Table:** A table listing members with columns: SAICA ID (Contact), Full Name (Cont...), Nickname (Cont...), Last Name (Cont...), Non Residency Status (Con...), Local/International ? (Con...), Role (Conta...), Registered Tax Practitioner (Co...), and Joining D.
- Right Panel:** Configuration options for the billing run.
 - Name:** CA SMB - 00001
 - Member Type:** CA
 - No. of Members:** 50
 - Price List:** CA Billing Run Pricelist-John
 - Bill Type:** Annual Billing
 - Run Type:** Partial Run
 - Invoice Year:** 2041
 - Billing Start Date:** 2024/01/01
 - Billing End Date:** 2024/12/31
 - Effective Date:** 2024/01/01
 - Invoice Due Date:** 2024/01/02
 - Invoice Payable By:** 2024/01/03
 - Created On:** 2024/01/18 11:57
 - Schedule Run:** When do you want to run? Run Immediately
 - Schedule Notifications:** When do you want to send notifications? Immediately after completion
 - Description:** Testing Reverse Penalties 00001

- › Auto-generated digital ID cards upon approval
- › QR code-enabled for instant verification
- › Badges for milestones, achievements, and contributions
- › Auto-regeneration upon renewal or profile updates
- › Secure storage in CRM and member portal

Certificate Orders

Certificate Types

Type of Certificate *
E-Certificate

Category of Certificate *
Membership

Contact Details

Name
Gaurav Officer

Email
gd1234890test@yopmail.com

Phone Number
4756360003211

☐ I confirm that the above profile details are



Dynamics 365 | SAICA App

Home Recent Pinned My Work Dashboards Activities Customers Contacts Accounts CPD Member Declarati... Monitoring Sched... BRP Eligibilities BRP Eligibility Exe... Service Cases Queue Items Applications CA Membership... AGA Membership... GAA Membership... AT(SA) Membersh... Service

Gaurav Officer - Saved
Contact - Main Form

49996974 SAICA ID Active Status Reason # Portals-SAICA Portal Owner

SUMMARY DETAILS BILLING Payments Deregister TP Integration Files **Replacement Certificates** InvoiceHeader Good Standing Review Survey Response ...

E-certificates

Case Number	Case Name	Customer	Certificate Type	Certificate Number	Origin	Status	Status Reason	Created On	Modified On
CAS-900384-W384Q0	Electronic Replacement C...	Gaurav Officer	Membership	CA-250325-25	Web	Resolv...	Case Closed	2025/03/25 18:18	2025/03/26 16:18
CAS-900169-B6V1G2	Electronic Replacement C...	Gaurav Officer	Membership	CA-250314-24	Web	Resolv...	Case Closed	2025/03/14 19:57	2025/03/25 18:14

Rows: 2

Print-certificates

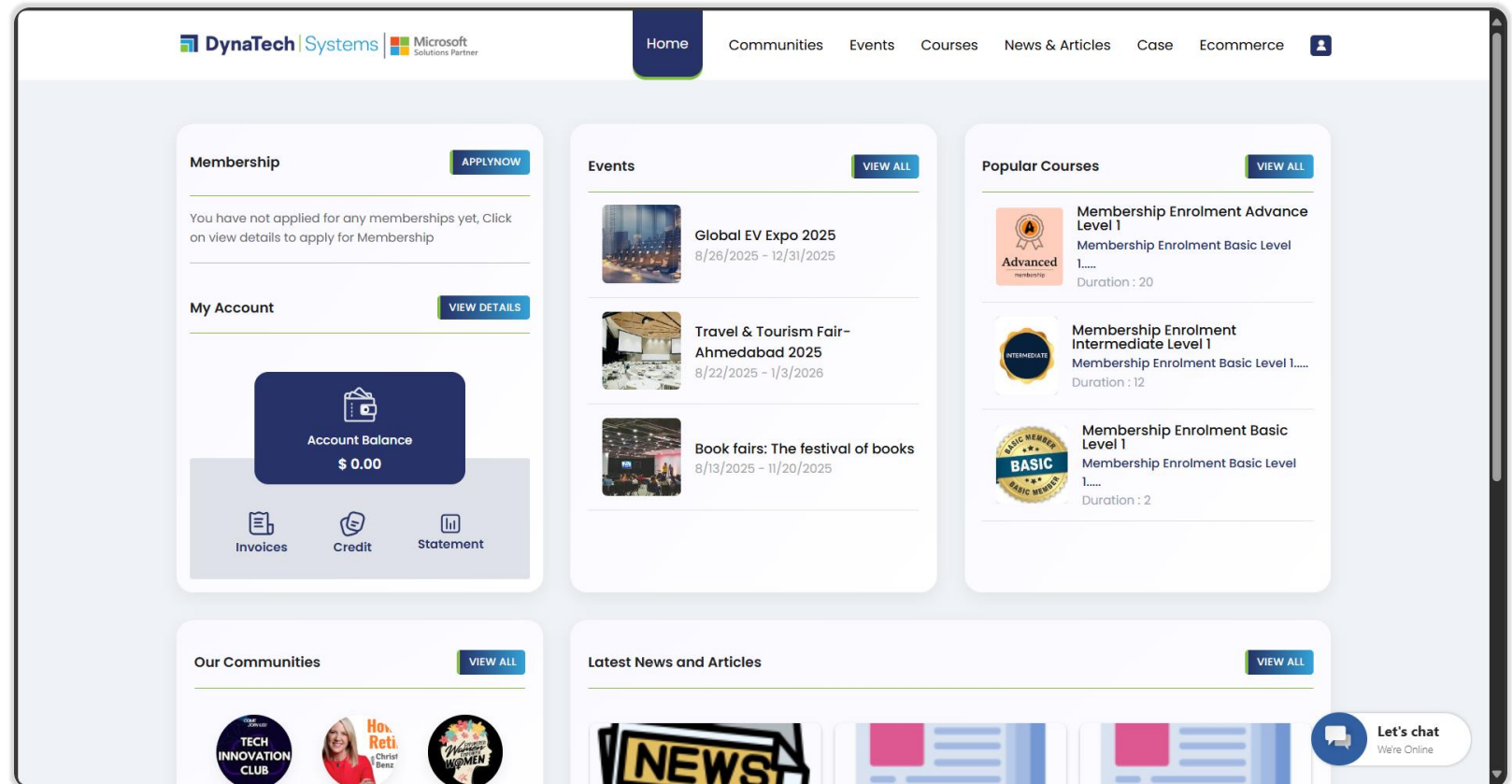
Case Number	Customer	Case Name	Certificate Type	Certificate Number	Tracking Number	Origin	Status Reason	Created On	Modified On
CAS-894595-S1Q8N7	Gaurav Officer	Print Replacement Certif...	Membership	133		Web	Invoice Gene...	2024/10/15 ...	2025/07/25 09...
CAS-909504-N1G1Q0	Gaurav Officer	Print Replacement Certif...	Membership			Web	In Progress	2025/05/27 ...	2025/05/30 16...
CAS-909435-P6Z8N7	Gaurav Officer	Print Replacement Certif...	Membership			Web	In Progress	2025/05/23 ...	2025/05/28 15...
CAS-900752-I9T9Z2	Gaurav Officer	Print Replacement Certif...	Membership			Web	In Progress	2025/04/02 ...	2025/04/07 14...

Rows: 4

- › Members can update profile details anytime
- › Configure communication preferences (email, SMS, portal)
- › Select interest areas for personalization
- › Data syncs real-time with CRM
- › Ensures compliance with privacy & consent requirements

The screenshot displays the 'My Account' page on the DynaTech Systems website. The left sidebar contains a 'My Account' menu with options: 'Personal Details' (selected), 'Supporting Documents', 'Payment And Fees', and 'Submit Application'. The main content area is divided into two sections: 'Personal Details Section' and 'Contact Information Section'. The 'Personal Details Section' includes a note 'Note: "Personal Details"' and fields for 'Full Name' (Albert James) and 'Date of Birth' (dd-mm-yyyy). The 'Contact Information Section' includes a note 'Note: "Contact Details"' and fields for 'Email Address' (jifalev494@binafex.com), 'Phone Number' (34534555344), 'Street', 'City', 'State', 'ZIP/Postal Code', and 'Country'. A 'NEXT' button is located at the bottom right of the 'Contact Information Section'. A chat bubble in the bottom right corner says 'Let's chat We're Online'.

- › Central hub for renewals, benefits, events, and courses
- › Download ID cards, certificates, and achievements
- › Access group/committee participation and documents
- › Manage support tickets and chatbot interactions
- › Seamless experience synced with CRM



1

› Automated invoicing and payment reconciliation

2

› Support for discounts, refunds, and adjustments

3

› Tax compliance and reporting built-in

4

› Integration with Dynamics 365 Finance or ERP

5

› Financial dashboards for leadership visibility

1

› Engagement scoring based on activities and renewals

2

› Predictive churn analysis for proactive retention

3

› Dashboards for active vs. at-risk members

4

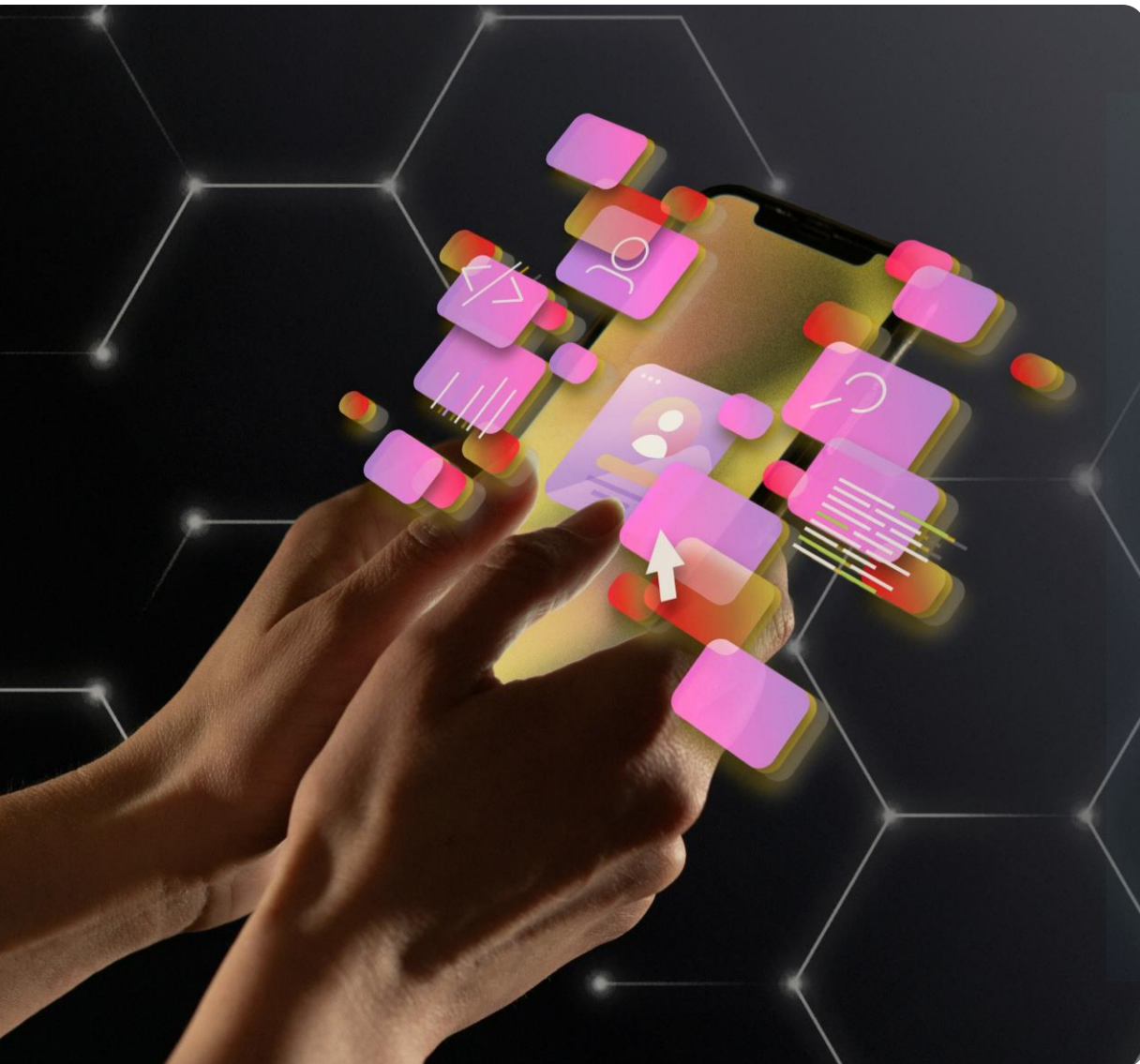
› Referral program insights and growth tracking

5

› Power BI reports for leadership and board reviews

Events and Conferences





End-to-End Event Lifecycle Management

Empower associations to seamlessly plan, deliver, and measure events—onsite, virtual, or hybrid—with integrated registration, payments, sponsorships, and analytics.

Plan, schedule, publish, and manage events.



End-to-End Lifecycle

Organize sessions, tracks, abstracts, and speaker profiles.



Multi-Session & Speakers

Streamlined booking, invoicing, and payment processing.



Registration & Payments

QR-based check-ins, session-level tracking, and CEU assignment.



Check-in & Attendance

Collect participant feedback pre- and post-event.



Surveys & Feedback

Manage sponsorship tiers, benefits, and visibility.



Sponsorship Packages

Track attendance, engagement, ROI, and revenue.



Reporting & Analytics

- › Create & schedule events in CRM with metadata and logistics
- › Setup includes type, venue/URL, capacity, tracks, speakers
- › Draft → Scheduled → Published → Completed → Archived
- › Recurrence & cloning for repeat events
- › Sync with Outlook/Calendars for reminders

Dynamics 365 Events & Seminars

Founder Institute Dhaka Graduate Showcase & Networking Event - Saved

Active Status: Khushi Shah (Owner) | Live Publish status

Event Main Business Process: Active for 42 days | Preliminaries (42 D) | Agenda | Organize | Promote | Launch | Post Event

General | Team Members | Sessions | Sponsors | Related

Key Information

- Event Title: Founder Institute Dhaka Graduate Showcase & Networking Event
- Event Type: In Person
- Event Start Time & Date: 8/12/2025 8:00 AM
- Event End Time & Date: 1/3/2026 8:00 AM
- Event Month: January, August, September, October, November, December
- Region: Northern Region
- Country: International
- Regions: Ireland
- Total CPD Hours: 1.00
- Email ID: seminars@gmail.com
- Call Center Number: 99948573654723723
- Maximum Event Capacity: 1,000
- Event URL:

Other Details

Details: Segue UI

Description: Join us for a fun filled day out on the bowling greens or on the golf course. Enter as a team or on your own and show up the competition!

Dynamics 365 Events & Seminars

Register 1057 - Saved

Register Information - Events & Seminars

General | Timeline | Related

Registration Number: Register 1057 | VAT No: 0

Event: 0 | VAT Amount: 0

Section: 0 | Coupon Code: 0

Register Type: Individual | Coupon Amount: 0

Attendee Count: 1

Registration Date: 8/12/2025 | Count of Members: 1

Invoice: 0 | Count of Non-Members: 0

Contact: 0 | Total Amount (w/ VAT) Members: 0

Account: 0 | Total Amount (w/ VAT) Non-Members: 0

Grand Total: 0 | Count of Trainers: 0

Register Form Attendee: 0 | Total Amount (w/ VAT) Trainers: 0

Series Of Event Total: 0 | Count of the Person: 0

Q & A: 0 | Total Amount (w/ VAT) Per Person: 0

Register Category: 0 | Cancellation Reason: 0

Register Line

Register Line Name	Register	Contact	Status Reason	Session	Session Start Time & Date (Session)	Session End Time & Date (Session)	Event (Session)	Email	Registration number	Registration Fee	Fee Type	Fee Amount	App / Origin (Registered)	Created On
Reg Line 1057	Register 1057	demo 11 user	Submitted	Global 01	8/12/2025 8:00 AM	8/12/2025 8:00 AM	Global 01	demo 11 user	0	0	No	0	Event and Seminar	8/12/2025 7:51

1

› Select platform (Zoom/Teams) during event setup

2

› API creates meetings/webinars automatically

3

› Join links embedded in confirmation emails & portal pages

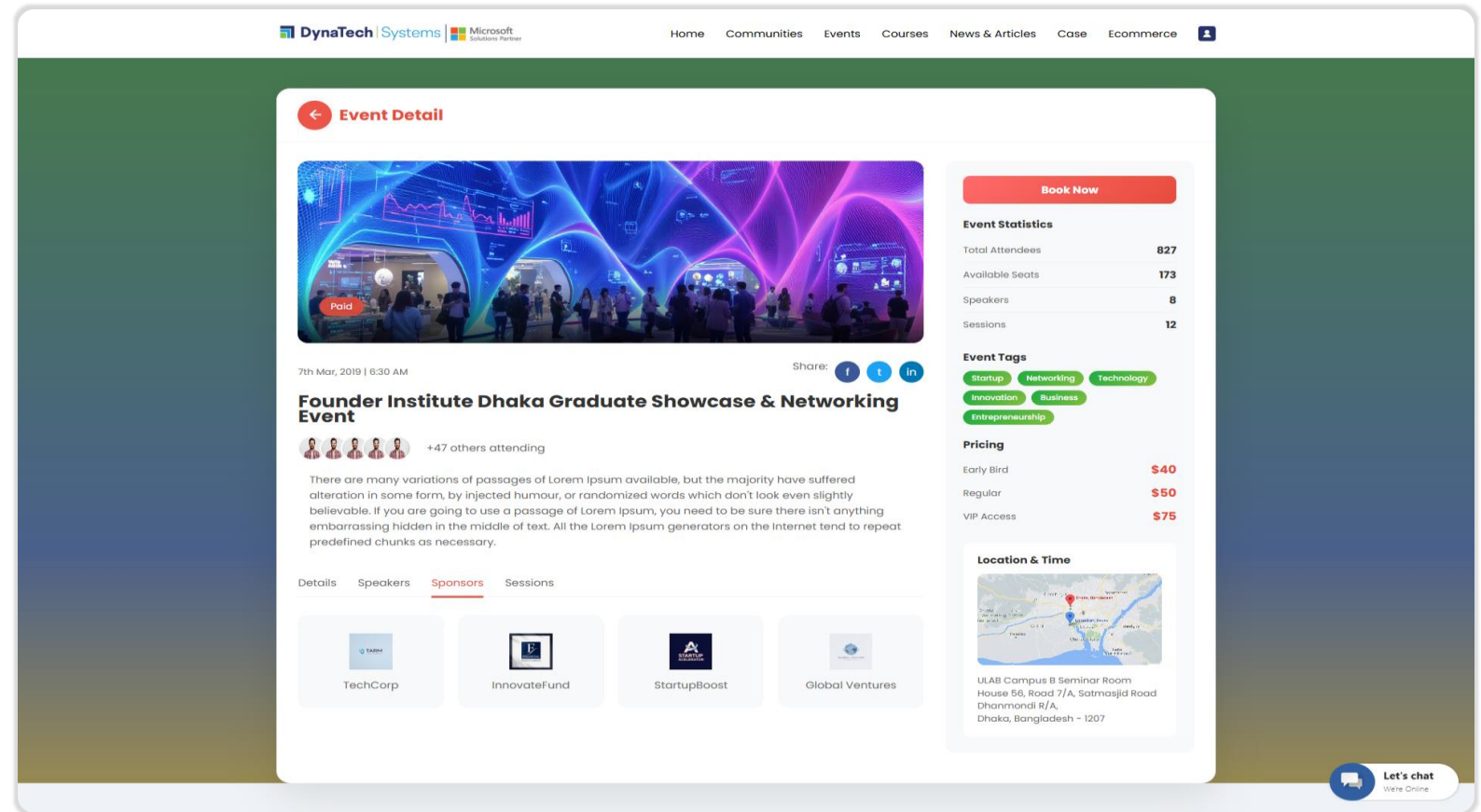
4

› Calendar integration for Outlook/iCal/Google

5

› Attendance syncs back to CRM post-event

- › Virtual: Auto-generate join links, capacity management
- › Onsite: Venue details, seating layouts, room capacities
- › Hybrid: Both modes enabled with attendee choice
- › Portal dynamically adjusts registration options based on type



- › Portal-based event registration forms
- › Capture attendee details, sessions, mode, preferences
- › Member vs. non-member pricing logic
- › Integrated secure payments & automated invoicing
- › My Events section on portal for attendees to manage bookings

The screenshot shows the 'Personal Info' step of the registration process for the 'Founder Institute Dhaka Graduate Showcase & Networking Event'. The user is logged in as 'Attendee 1'. The form includes fields for 'Hello', 'World', 'thisistest@test.com', and '8881212'. There are radio buttons for 'Member' (selected) and 'Non Member'. A 'Questions' section asks 'Do you agree to having your contact details made available to the event sponsor(s)?' with a 'yes' button. A 'Next' button is at the bottom.

The screenshot shows the 'Payment' step of the registration process. It displays the event details and a pricing table. The pricing table shows the total amount excluding VAT, VAT at 5%, and the grand total including VAT. A checkbox for accepting terms and conditions is checked. A 'Next' button is at the bottom.

Founder Institute Dhaka Graduate Showcase & Networking Event	
Event Name	Founder Institute Dhaka Graduate Showcase & Networking Event
Session Name	Golf (4 Ball)
Total number of attendees	1
1 x Member Pricing / Per Session @ 25 / Session	\$ 25.00 (Exclusive 5% VAT)
0 x Non Membership Pricing / Per Session @ 35 / Session	\$ 0.00 (Exclusive 5% VAT)
Total amount(Excluding 5% VAT)	\$ 25.00
VAT (5%)	\$ 1.25
Grand Total	\$ 26.25 (including 5% VAT)

1

› Create multiple sessions/tracks per event

2

› Link speakers to sessions with bios, expertise, photos

3

› Public speaker directory on portal with filters

4

› Automated comms: confirmations, reminders, instructions

5

› Session-specific attendance & feedback tracking

1

› Generate badges with QR codes for each registrant

2

› Badges delivered via email & portal download

3

› Onsite check-in via QR scan (mobile app/kiosk)

4

› Virtual auto check-in via Zoom/Teams login

5

› Real-time CRM updates: Registered → Checked-in

1

› Assign CEUs to sessions/events during setup

2

› Attendance validated via check-in or login logs

3

› CEUs accumulated per member in CRM

4

› Certificates auto-generated when thresholds met

5

› CEU history & certificates visible in member portal

1

› Pre-event surveys capture expectations

2

› Post-event & session-level feedback forms

3

› Distributed via email or portal (Customer Voice)

4

› Capture NPS, speaker ratings, content quality

5

› Feedback linked to attendee/session for analytics

1

› Define tiered packages (Gold/Silver/Bronze)

2

› Assign benefits: logos, booths, speaking slots

3

› Sponsors apply via portal or added by admins

4

› Invoices generated & benefits tracked in CRM

5

› Sponsor visibility on event pages & apps

1

› Dashboards for registrations, attendance, revenue

2

› Session & speaker popularity tracking

3

› Feedback aggregation & sentiment analysis

4

› Segmentation by member type, ticket, event type

5

› Benchmarks vs. past events for improvement

Fundraising & Giving





Modern, Transparent, and Donor-Friendly Giving

Enable associations and nonprofits to maximize donor contributions with targeted campaigns, secure payments, recognition programs, and transparent reporting.

Launch targeted, branded donation campaigns.



Donation Campaigns

Enable one-time, recurring, tribute, or corporate-matching donations.



Secure Donations

Offer installment-based pledges and donation add-ons during checkout.



Pledges & Add-Ons

Assign donor tiers, certificates, and digital badges.



Recognition & Badging

Showcase campaign progress in real time.



Fundraising Thermometers

Track donor lifecycle, retention, and ROI.



Analytics

Send instant thank-you notes, receipts, and donor journeys.



Automated Stewardship

1

› Create campaigns with goals, timelines, and budgets

2

› Link to branded donation pages, emails, and social pushes

3

› Real-time thermometer tracking of campaign progress

4

› Monitor donations, average gift size, and channel performance

5

› Automated thank-you emails, receipts, and follow-ups

1

› Branded forms in Power Pages with logo & colors

2

› Options: preset/custom amounts, one-time or recurring

3

› Tribute donation checkbox for “In Honor” or “In Memory”

4

› Secure payments (Stripe, Razorpay, etc.)

5

› Real-time CRM sync with donor record creation

6

1

› Tribute donations with honoree details & notifications

2

› Tribute walls for recognition (optional, donor consent)

3

› Donors indicate employer matching program

4

› CRM tracks match requests and corporate contribution status

5

› Dashboards show top matching companies and amounts

- › Recognition tiers (Bronze, Silver, Gold) auto-assigned by contribution
- › Badges, certificates, and portal visibility for recognition
- › Showcase top donors in newsletters, events, and “Wall of Honor”
- › Encourage ongoing giving through appreciation campaigns

Dynamics 365 | Grant Management SANDBOX

Home Recent Pinned My Work Activities Dashboard Relationships Accounts Contacts Fundraising Funding Opportunities Awards Designation Plans Planned Giving Grants Objectives Delivery Frameworks Requests Awards Disbursements Posting Timesheet Tr... Manager Approvals Tasks Categories Project Resources

Hepatitis C Elimination Initiative Pilot - Saved
Funding Opportunities · Funding Opportunities

Shail Prajapati Owner Initiate Award Status

Donor Commitment Completed in 1 minute

Identify Donor Engage Donor Submit Proposal Secure Funding Initiate Award

General Designation Plans **Awards** System Programme Planning Analytics Related

Form assist

Active Transactions for Fundraising

<input type="checkbox"/>	Name	Book Date	Donor	Amount	Primary Designation	Type	Payment Type	Payment Schedule	Donor Commitment	Is Adjusted	Gift Batch
<input type="checkbox"/>	Tier 4	8/26/2025 1:30...	Hepatitis C...	₹100,000.00		Donation			Hepatitis C Elimination Initia...	No	
<input type="checkbox"/>	Tier 1	7/1/2025 1:30 ...	Hepatitis C...	\$2,500,000...	Brand Designation	Donation	In Kind	10,000 Payment Sc...	Hepatitis C Elimination Initia...	No	
<input type="checkbox"/>	Tier 2	4/1/2025 6:30 ...	Hepatitis C...	\$25,000.00	Brand Designation	Donation	Fund Transfer	10,000 Payment Sc...	Hepatitis C Elimination Initia...	No	
<input type="checkbox"/>	Tier 3	4/1/2025 1:30 ...	Hepatitis C...	\$500,000.00	Brand Designation	Donation	In Kind	10,000 Payment Sc...	Hepatitis C Elimination Initia...	No	

Rows: 4

- › Donors commit to installment-based contributions
- › CRM creates pledge record with frequency, timeline, and status
- › Auto-generate payment reminders and thank-you messages
- › Portal shows pledge progress and payment options
- › Dashboards compare pledged vs. collected amounts

Dynamics 365 Grant Management **SANDBOX**

Hepatitis C Elimination Initiative Pilot - Saved

Funding Opportunities · Funding Opportunities

Donor Commitment Completed in 1 minute

Identify Donor Engage Donor Submit Proposal Secure Funding Initiate Award

General Designation Plans **Awards** System Programme Planning Analytics Related

Form assist

Active Transactions for Fundraising

<input type="checkbox"/>	Name	Book Date	Donor	Amount	Primary Designation	Type	Payment Type	Payment Schedule	Donor Commitment	Is Adjusted	Gift Batch
<input type="checkbox"/>	Tier 4	8/26/2025 1:30...	Hepatitis C...	\$100,000.00		Donation			Hepatitis C Elimination Initia...	No	
<input type="checkbox"/>	Tier 1	7/1/2025 1:30 ...	Hepatitis C...	\$2,500,000...	Brand Designation	Donation	In Kind	10,000 Payment Sc...	Hepatitis C Elimination Initia...	No	
<input type="checkbox"/>	Tier 2	4/1/2025 6:30 ...	Hepatitis C...	\$25,000.00	Brand Designation	Donation	Fund Transfer	10,000 Payment Sc...	Hepatitis C Elimination Initia...	No	
<input type="checkbox"/>	Tier 3	4/1/2025 1:30 ...	Hepatitis C...	\$500,000.00	Brand Designation	Donation	In Kind	10,000 Payment Sc...	Hepatitis C Elimination Initia...	No	

Rows: 4

1

› Sync donation transactions with Dynamics 365 Finance & Operations

2

› FO journals, ledgers, and reconciliations auto-created

3

› Return statuses: Synced, Failed, Reconciled

4

› Audit-ready storage of receipts and classification of donations

5

› Tax-deductible and restricted funds tracked in Finance

1

› Personalized thank-you emails with donor name & campaign info

2

› Branded receipts generated automatically and attached to emails

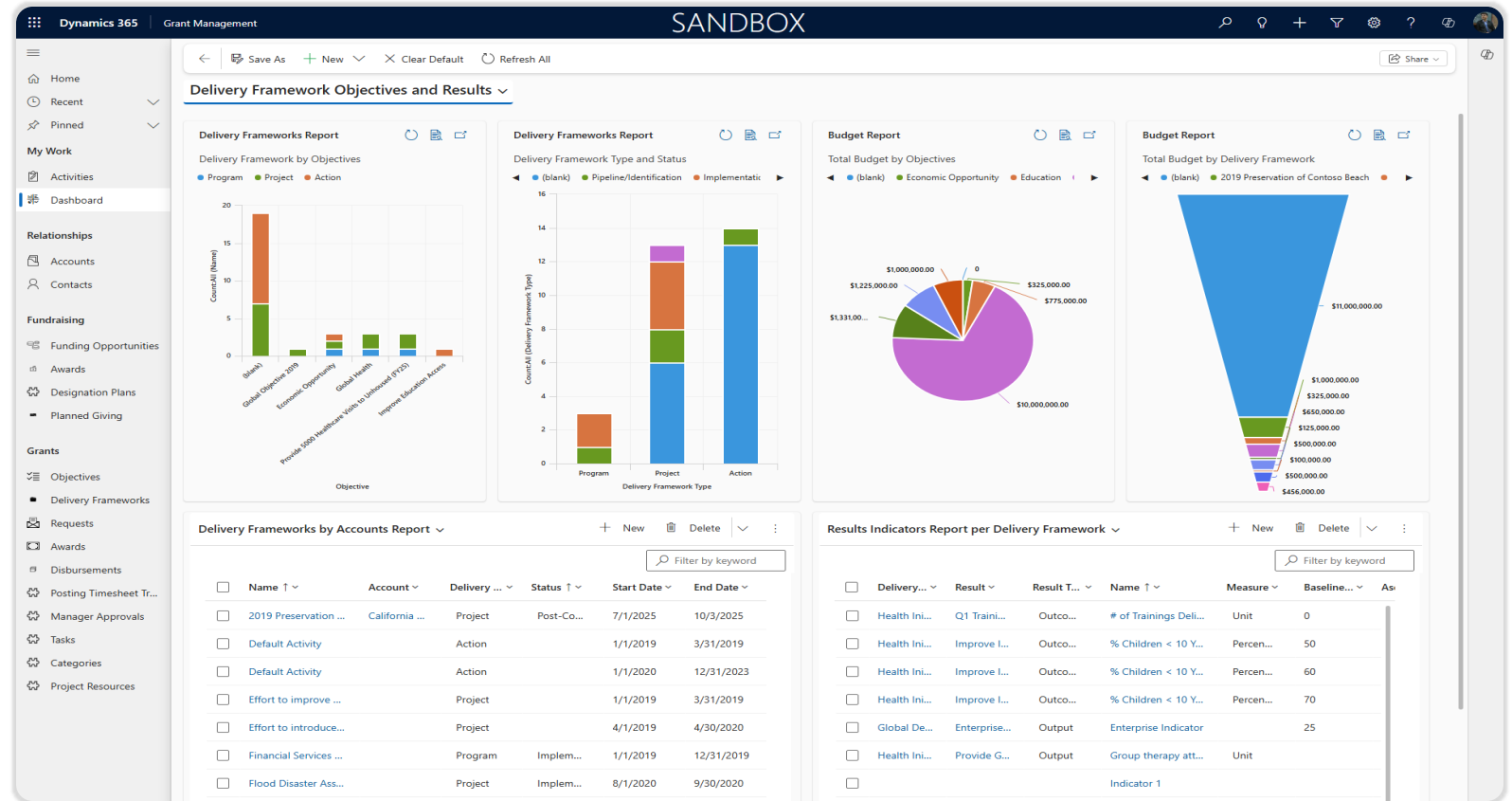
3

› Stored centrally in CRM for audit and donor requests

4

› Tier-based personalization of messages and certificates

- › Power BI dashboards: donations vs. goals, campaign ROI, donor trends
- › Drill down by donor type, campaign, or channel
- › Track donor lifecycle: retention, acquisition, lifetime value
- › Segment: recurring, lapsed, or high-value donors
- › Alerts for at-risk donors and re-engagement campaigns



- › Maintain detailed donor profiles in CRM
- › Automate communication journeys: welcome, anniversaries, milestones
- › Assign high-value donors to relationship managers
- › Track all interactions in CRM timeline
- › Monitor impact of stewardship on donor retention



Marketing & Engagement





Engage Members with Personalized, Multi-Channel Communications

Enable associations to deliver relevant content, nurture relationships, and drive engagement through automated, data-driven campaigns.

Reach members via Email, SMS, WhatsApp, and Push Notifications.



Multi-Channel Campaigns

Build smart segments based on member profile, behavior, and engagement.



Dynamic Segmentation

Automate campaigns for renewals, events, onboarding, and re-engagement.



Automation & Journeys

Publish structured content and updates through the member portal.



News & Articles

Collect actionable feedback and measure sentiment.



Surveys & Polls

Use branded templates and test variations to optimize performance.



Templates & A/B Testing

Track activity, assign scores, and identify highly engaged members.



Lead & Engagement Scoring

Monitor campaign performance, ROI, and member engagement.



Analytics

- › Launch campaigns via Email, SMS, WhatsApp, and Push Notifications from one system.
- › Use drag-and-drop editors with branded templates and personalization tokens.
- › Ensure compliance with member preferences, opt-outs, and GDPR/consent settings.
- › Monitor delivery, open, click, bounce, and unsubscribe rates in real time.
- › Trigger follow-up actions such as nurture journeys, reminders, or support tickets.

Dynamics 365 | Customer Insights - Journeys

SANDBOX

All Emails

- Membership Application Mail
Ready to send
Created On: 7/31/2025 11:46 AM
- Membership Promotion
Ready to send
Created On: 7/31/2025 12:09 PM
- Registration confirmation
Ready to send
Created On: 7/31/2025 12:58 PM
- Membership Renew Email
Ready to send
Created On: 8/1/2025 7:54 AM
- Membership Confirmation Email
Ready to send
Created On: 8/1/2025 8:20 AM
- Gold Subscription Letter
Ready to send
Created On: 8/4/2025 7:01 AM
- Platinum Membership Subscription letter
Ready to send
Created On: 8/4/2025 7:05 AM

Membership Promotion • Ready to send - Saved

Design Insights Preview and test Audit history

From: Default brand sender (admin@unqcd30a55e1ca6ef118a66000d3a106.s05.dyn365mktg...)
Subject: Your next holiday is waiting for you.

Email analytics

Show data for
All journeys (3)

Inflow	Processing	Processed
404	0	404

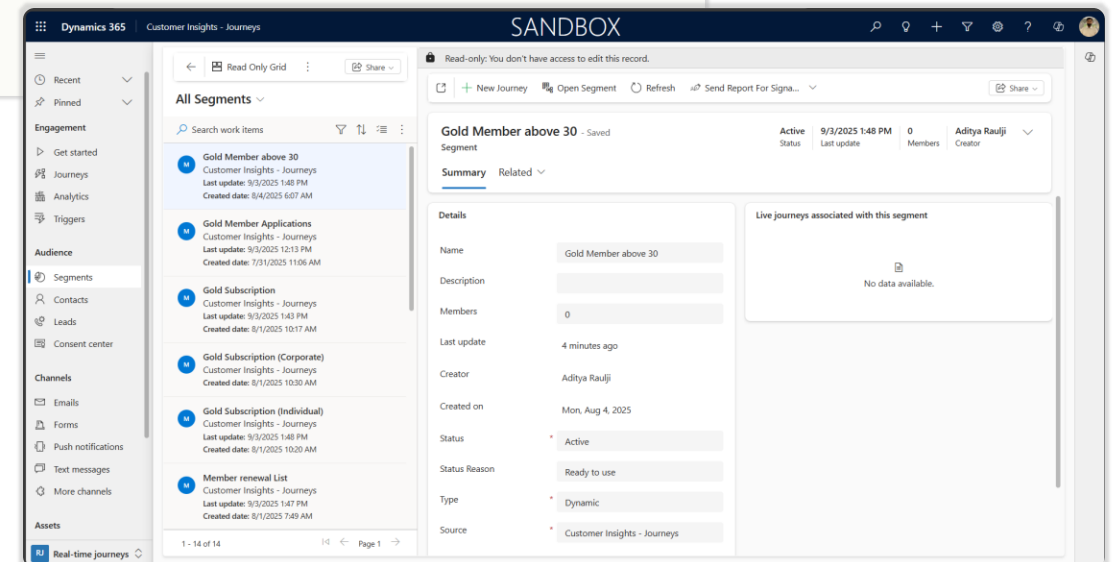
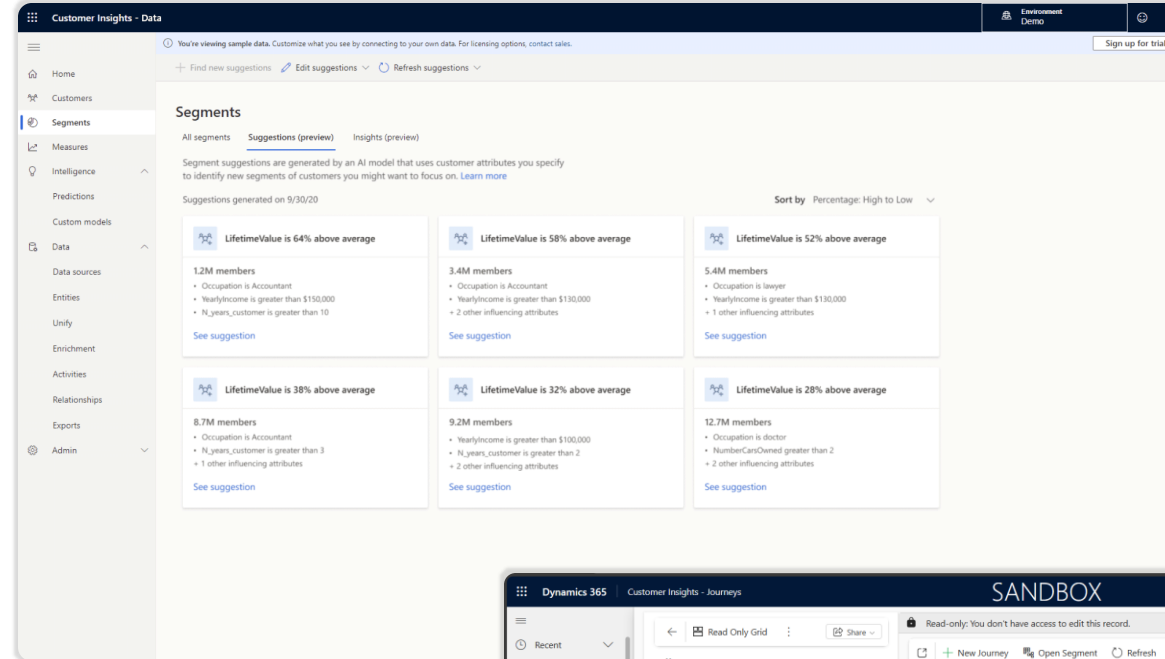
Overview

Delivery rate	Open rate	Click rate
1.2%	0%	0%

Delivery funnel

Email sent
Email delivered
Unique opens
Unique clicks

- › Create static lists or dynamic rule-based segments using CRM data.
- › Filter members by demographics, membership type, location, CEUs, event history, and engagement.
- › Use AND/OR logic to refine targeting and build micro-segments.
- › Segments refresh automatically to always include the latest qualified contacts.
- › Compare segment performance across campaigns and refine rules for better ROI.



1

› Configure drip campaigns for onboarding, renewals, event follow-ups, or re-engagement.

2

› Support multi-channel journeys: email, SMS, WhatsApp, push notifications, and tasks.

3

› Personalize each step using profile attributes like name, membership status, or preferences.

4

› Branching logic ensures different paths based on user actions (opened, clicked, ignored).

5

› Automate renewal notices, welcome series, or reactivation campaigns without manual effort.

1

› Promote upcoming events to targeted segments (by chapter, type, or past participation).

2

› Build multi-wave promotion strategies: early invites, reminders, and last-chance alerts.

3

› Personalize messages with event details like title, date/time, speaker, and session highlights.

4

› Automate registration reminders for members who haven't completed sign-up.

5

› Track campaign performance in real time across channels and optimize messaging.

1

› Create branded surveys with multiple question types to collect member feedback.

2

› Distribute via email campaigns, SMS/WhatsApp links, or embedded in portal pages.

3

› Build quick polls into newsletters or dashboards for fast interaction.

4

› Responses are automatically stored against member records in CRM.

5

› Analyze satisfaction, sentiment, and trends over time with dashboards.

1

› Centralized library of reusable branded templates for campaigns, events, and newsletters.

2

› Apply consistent organization branding: colors, fonts, logos, footers, and disclaimers.

3

› Run A/B tests for subject lines, content blocks, or delivery times.

4

› System monitors results and automatically deploys the winning version.

5

› Archive or update outdated templates to maintain compliance and relevancy.

1

› Real-time dashboards visualize performance across campaigns, segments, and channels.

2

› Drill into metrics such as open rates, registrations, conversions, and ROI.

3

› Compare campaign effectiveness across member groups or communication methods.

4

› Track donor/member lifecycle, retention rate, and lifetime value.

5

› Track trends with dashboards to identify highly engaged vs. at-risk members.

1

› Real-time dashboards visualize performance across campaigns, segments, and channels.

2

› Drill into metrics such as open rates, registrations, conversions, and ROI.

3

› Compare campaign effectiveness across member groups or communication methods.

4

› Track donor/member lifecycle, retention rate, and lifetime value.

5

› Export insights for leadership presentations, board meetings, and annual reports.

Digital Commerce & Revenue





Enable Seamless Digital Commerce for Members

Provide associations with a modern eCommerce storefront to sell memberships, courses, merchandise, and more, integrated directly with Dynamics 365.

01

Storefront Integration

Branded Power Pages store to sell products, memberships, and events.



02

Cart & Checkout

Streamlined checkout with discounts, promotions, and coupons.



03

Inventory & Fulfillment

Real-time stock visibility and shipping management.



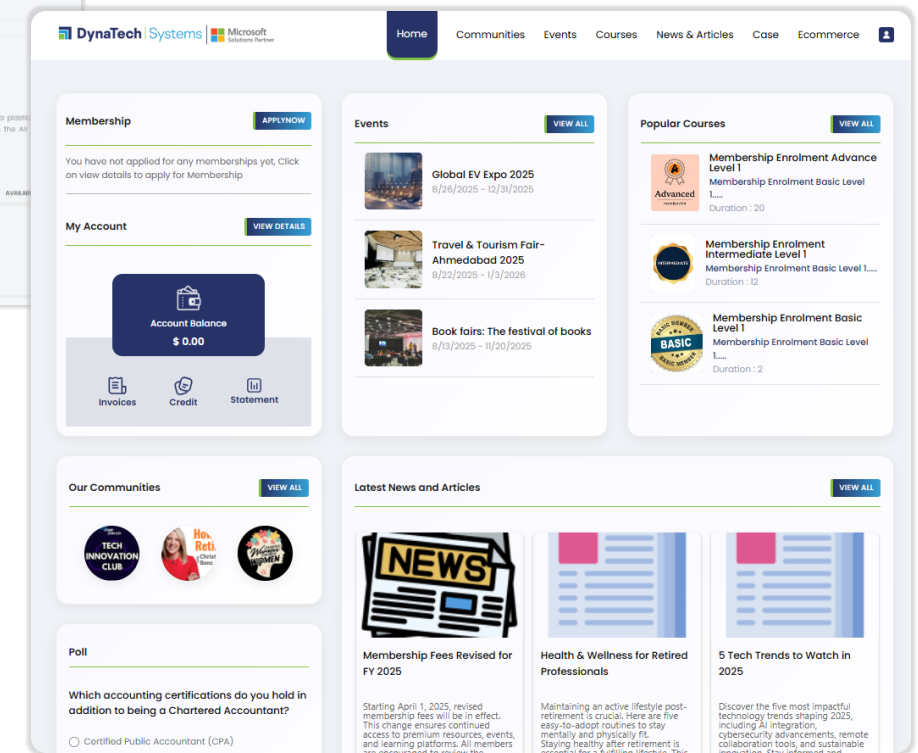
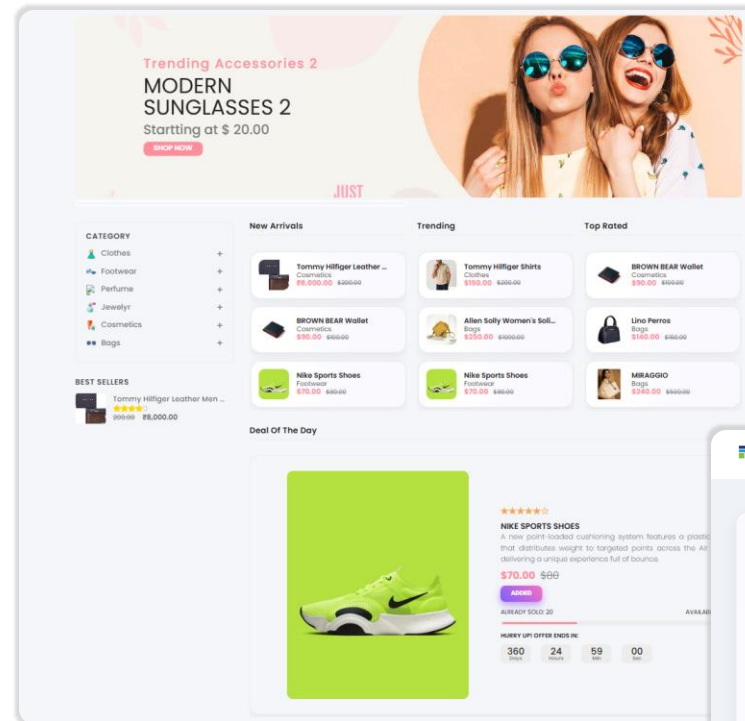
04

Reviews & Recommendations

Member-driven ratings with AI-powered product suggestions.



- › Branded Power Pages storefront for a consistent member shopping experience.
- › Browse products, courses, memberships, and donation options in one place.
- › CRM Product Catalog syncs details (name, price, inventory, visibility).
- › Dynamic portal display with search, filter, and category navigation.
- › Product detail pages with images, videos, related items, and “Add to Cart.”



1

› Admin manages listings in CRM with stock, pricing, and visibility rules.

2

› Draft vs. Published states for controlled rollouts.

3

› Member-only pricing and exclusive product visibility supported.

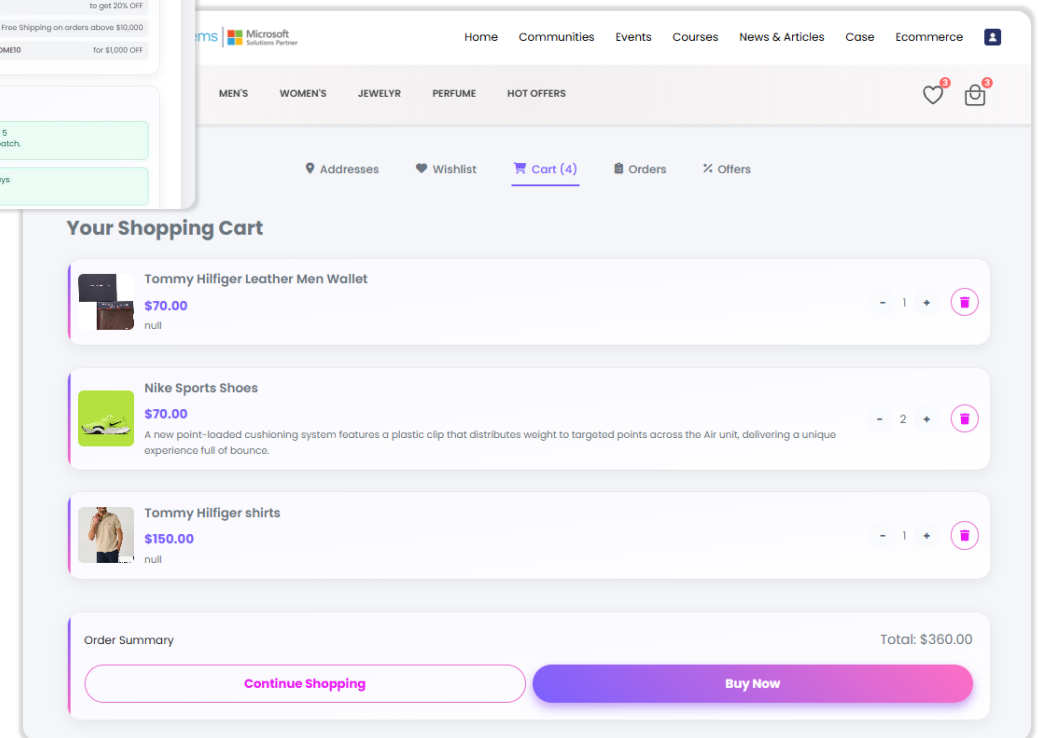
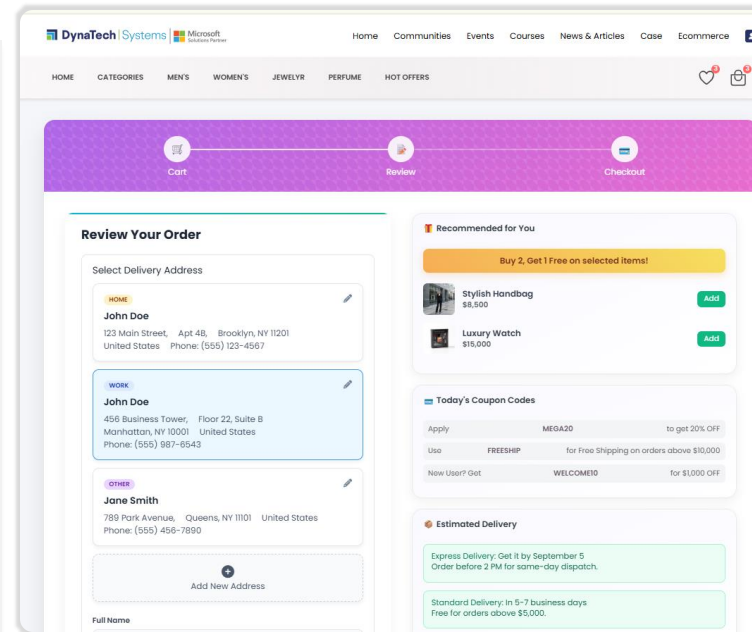
4

› Categories, tags, and images ensure easy discovery in portal.


5

› Automatic sync to storefront ensures real-time updates.


- › Add multiple items (products, memberships, courses) to cart in one click.
- › Cart shows live item count, subtotal, and applied discounts.
- › Update quantity, remove items, or apply coupons directly.
- › Secure checkout with auto-filled data for logged-in members.
- › Support for guest checkout, donation add-ons, and multiple payment gateways.
- › Post-purchase confirmation with receipt, invoice, and download/shipping info.





- › Create percentage, flat-rate, or “Buy X Get Y” campaigns in CRM.
- › Set rules by validity dates, usage limits, products, or member eligibility.
- › Customers apply codes during checkout, system validates instantly.
- › Real-time recalculation of totals with discounts applied.
- › Track redemption rates, top-performing codes, and promotion ROI in CRM/Power BI.

 Recommended for You

Buy 2, Get 1 Free on selected items!

 Stylish Handbag
\$8,500 [Add](#)

 Luxury Watch
\$15,000 [Add](#)

 Today's Coupon Codes

Apply	MEGA20	to get 20% OFF
Use	FREESHIP	for Free Shipping on orders above \$10,000
New User? Get	WELCOME10	for \$1,000 OFF

- › Customers leave ratings and reviews post-purchase via portal.
- › Reviews include star rating, text feedback, and optional images.
- › Moderation workflow ensures quality and blocks spam.
- › Product pages display average ratings and allow filtering.
- › CRM dashboards track sentiment, satisfaction trends, and flagged issues.
- › Feedback used to improve offerings and promote top-rated products.



1

› AI/Rule-based logic suggests items based on browsing, purchases, and membership.

2

› Displayed in “You May Also Like” sections on product, cart, or portal dashboard.

3

› Related products shown during checkout and post-purchase.

4

› Always filters out unavailable or restricted items.

5

› CRM tracks CTR, conversion rate, and upsell success to refine logic.

1

› Real-time inventory synced with CRM or ERP (e.g., D365 FO).

2

› Stock labels show In Stock, Low Stock, or Out of Stock dynamically.

3

› Quantity selector restricted to available units to prevent overselling.

4

› On checkout, stock deducted automatically and synced back to CRM/ERP.

5

› Dashboards track fast-moving products and low-stock alerts.

6

› Auto-generate restock POs or internal requests; sync with warehouse logistics.

1

› Order lifecycle tracked: Processing → Packed → Shipped → Delivered.

2

› Courier/3PL integration (e.g., FedEx, DHL) for tracking number sync.

3

› Email + portal updates keep customers informed in real time.

4

› “My Orders” section in portal shows current status and history.

5

› CRM workflows trigger alerts for delays and auto-close delivered orders.

1

› Tax rules configured in CRM or via tax engine (Avalara, TaxJar).

2

› Auto-calculation during checkout based on address, product type, and jurisdiction.

3

› Cart summary shows clear line-item and total tax breakdown.

4

› Tax data stored with each order and synced with D365 FO.

5

› Reports support multi-region compliance, exemptions, and filing exports.

6

› Ensures financial transparency and audit readiness.

Learning & Credentialing





Empower Lifelong Learning and Credentialing

Provide associations with end-to-end certification and education capabilities—from exam delivery to CEU/CPD tracking—while offering members personalized learning pathways.

End-to-end credentialing management with eligibility, renewals, and tracking.



Certification Programs

Manage professional exams including scheduling, eligibility, results, and publishing.



Exam & Assessment Automation

Provide guided career or competency-based learning journeys.



Courses & Learning Pathways

Secure and automated assessments with real-time validation.



Online Testing

Issue verifiable digital credentials and certificates.



Badges & Certificates

Integrate seamlessly with LMS platforms for learning delivery.



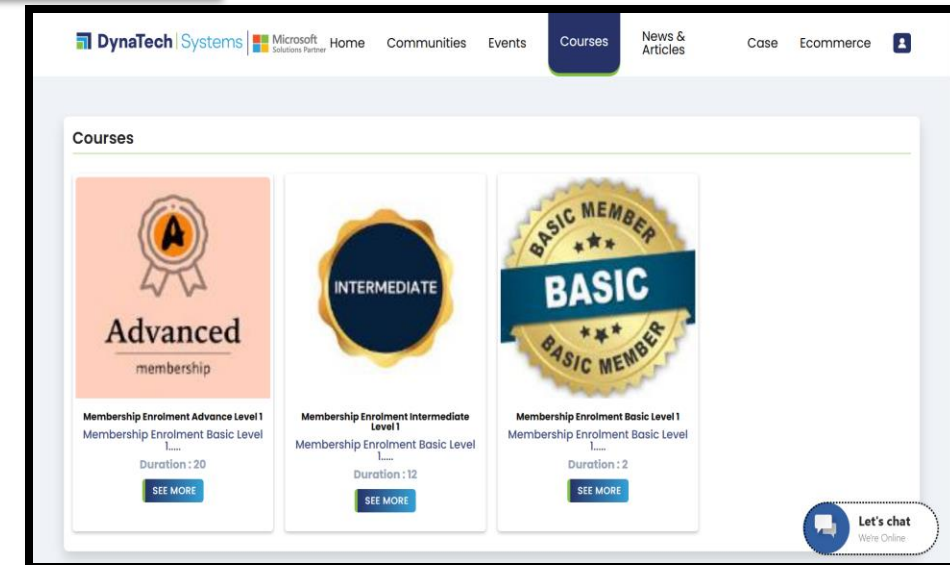
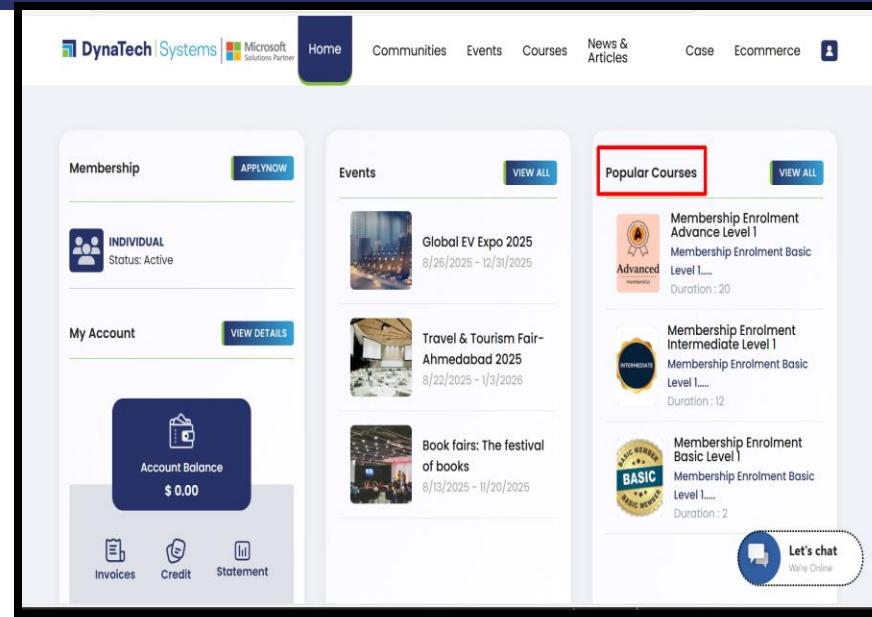
LMS Integration

Monitor completion rates, trends, learner progress, and renewal cycles.



Analytics

- › Members can browse available certifications by category, level, or domain.
- › Detail pages show syllabus, eligibility, pricing, CEUs, and instructors.
- › Enroll directly or via application workflow with payment integration.
- › CRM tracks status: Applied → Approved → Enrolled → Completed → Certified.
- › Admin manages program setup, prerequisites, renewals, and performance tracking.



- › Courses listed in catalog with filters for level, category, or program.
- › Each course displays summary, instructors, CEUs, price, and schedule.
- › Learning paths define sequenced courses/modules for career goals.
- › Portal shows progress roadmap with “Continue Learning” actions.
- › Completion unlocks badges, certificates, or progression to next level.

Details
Summary
Duration

WORK MUSIC - 1 Hour of Ultimate Work Music for Deep Focus and Efficiency #3

Watch on YouTube
Register Now

Membership Enrolment Advance Level 1

This webinar seeks to encourage members to start thinking about laws and legislation that could assist in making the use of AI safer. Currently, there is no comprehensive legislation or regulations in South Africa that regulate the development of AI or specifically prohibit or restrict their use. Companies need to start thinking of policies and procedures to put in place in order to protect themselves.

South Africa is heavily dependent on the application of data protection legislation for the regulation of AI. A number of African jurisdictions have taken steps to address this unique policy challenge, with various African countries implementing AI strategies, others still in the process of consultation with stakeholders on AI policies.

Africa has again found itself on the receiving end of AI technologies, but this time, the continent can influence their regulation. This begins with informing stakeholders of what the risk are and then collectively seeking a solution that will result in policies and procedures around AI, which will drive the law making process within the African continent.

Instructor Bio

Merry Chepoc

Details	Summary	Duration
Course Status	Upcoming	
Course Type	Elective	
Language for course content	English	
Duration	12 weeks	
Category	p-0 Architecture and Planning, Construction M	
Level	Undergraduate/Postgraduate	
Start Date	20 Jan 2025	
End Date	11 Apr 2025	
Enrollment Ends	27 Jan 2025	
Exam Registration Ends	14 Feb 2025	
Exam Date	27 Apr 2025 IST	

DynaTech | Systems
Microsoft Solutions Partner

Home
Communities
Events
Courses
News & Articles
Case
Ecommerce

Details
Summary
Duration

Week 1

Introduction to Environment Management & EIA

Week 2

Legal, Policy & Regulatory Framework

Week 3

EIA Procedure - Scoping & Screening and Establishing Baseline Conditions

Week 4

EIA Methodologies

Week 5

Connectedness: connected spaces and subspaces, Connectedness of the real line, Intermediate value theorem

Week 6

EIA Methods, Tools and Techniques

Week 7

Public Involvement in EIA

Week 8

Impact Management - Mitigation & Preparation of Environment Management Plans (EMP)

Week 9

EIA Reporting & Review of EIA Quality

Week 10

Decision Making & Project Management

Week 11

Implementation & Follow up

Week 12

EIA Case Examples

1

› Certification-linked assessments configured in CRM or LMS.

2

› Supports quizzes, MCQs, timed tests, or scenario-based questions.

3

› Auto-graded for objective questions; subjective answers flagged for review.

4

› Results stored in CRM with Pass/Fail status and next-step triggers.

5

› Admin dashboards track completion rates, average scores, and item analysis.

1

› Learners access tests from portal “My Courses” after completion.

2

› One-time or multiple attempts allowed based on rules.

3

› Proctoring and timer controls ensure exam integrity.

4

› Outcomes drive certification: Passed → badge issued, Failed → retry option.

5

› Integrated workflows handle exceptions, manual overrides, and accommodations.

1

› Digital badges and PDF certificates auto-generated upon completion.

2

› Templates include program name, member details, date, CEUs, and QR validation ID.

3

› Certificates available via email and portal; optional social sharing.

4

› Integration with platforms like Credly or OpenBadges supported.

5

› Admin manages issuance logs, re-issuance, and public validation tools.

1

› CEUs pre-configured per course, event, or activity.

2

› System automatically updates member profile upon completion.

3

› Portal shows lifetime CEUs and breakdown by category or certification.

4

› Renewal reminders triggered 90/60/30 days before expiry.

5

› Admin dashboards track renewal conversion, at-risk members, and compliance.

1

› External LMS (Moodle, TalentLMS, Canvas) integrated with CRM via APIs.

2

› Supports SSO for seamless learner access.

3

› Sync enrollment, completion, and assessment data back to CRM.

4

› Option to manage learning internally via D365 + Power Pages.

5

› Decision criteria: scalability, reporting needs, and user experience.

1

› Dashboards track enrollments, completions, CEUs, and certification trends.

2

› Drill-down by program, course, role, or time period.

3

› Identify drop-off points, most popular certifications, and learner satisfaction.

4

› Benchmark completion and renewal rates against standards.

5

› Insights guide future program design, pricing, and learning paths.

Communities & Collaboration





Foster Collaboration, Networking, and Engagement

Provide associations with digital tools to build thriving communities, encourage knowledge exchange, and recognize member contributions.

Opt-in directory for networking and collaboration.



Member Directory

Structured online forums with moderation and analytics.



Forums & Discussions

Create interest-based groups and professional networks.



Community Spaces

Manage opportunities, applications, and recognition.



Volunteer & Committee Management

Publish updates, thought leadership, and policy information.



News & Articles

Celebrate member contributions with awards and badges.



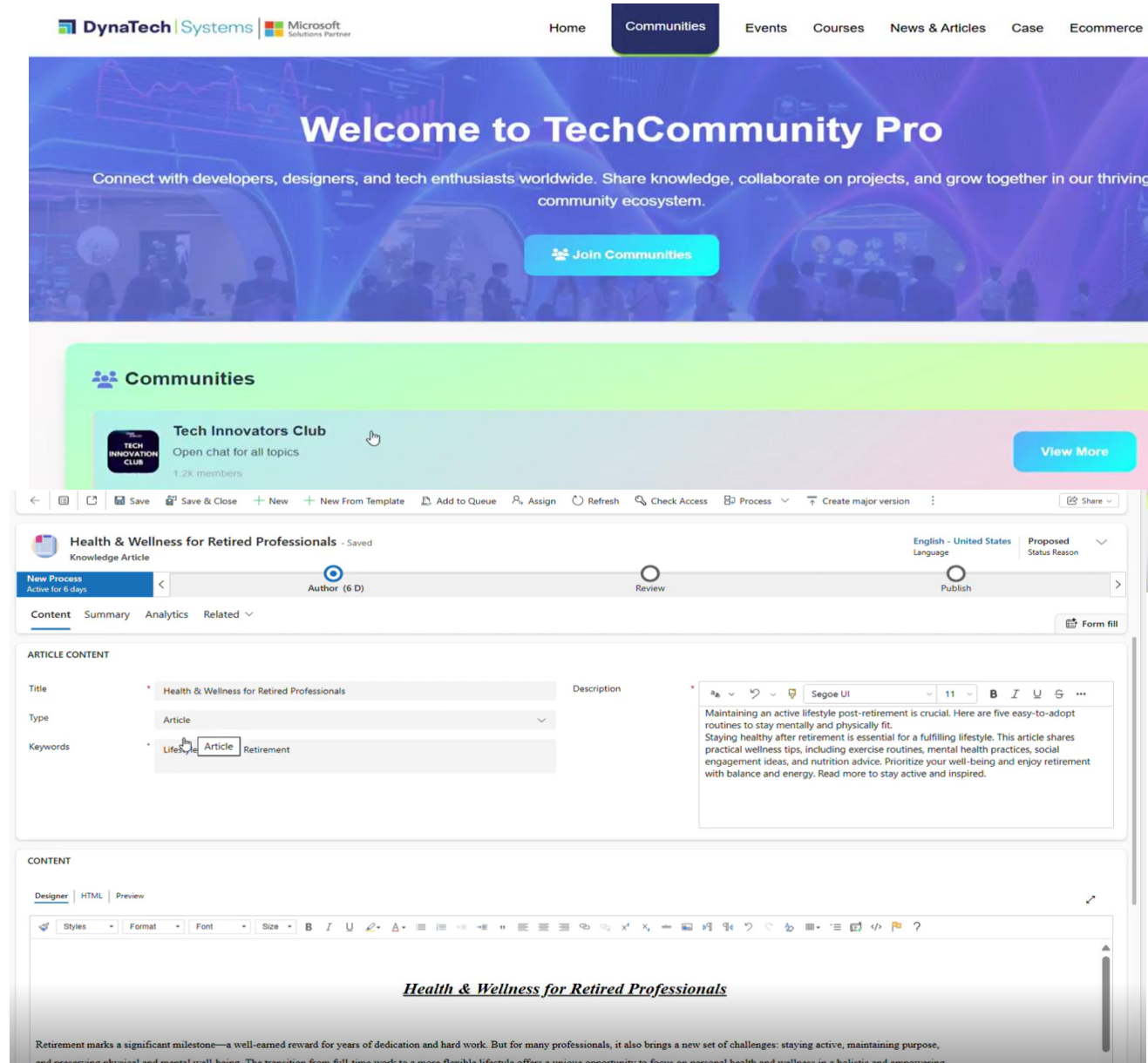
Recognition & Awards

Monitor participation, volunteer impact, and engagement trends.

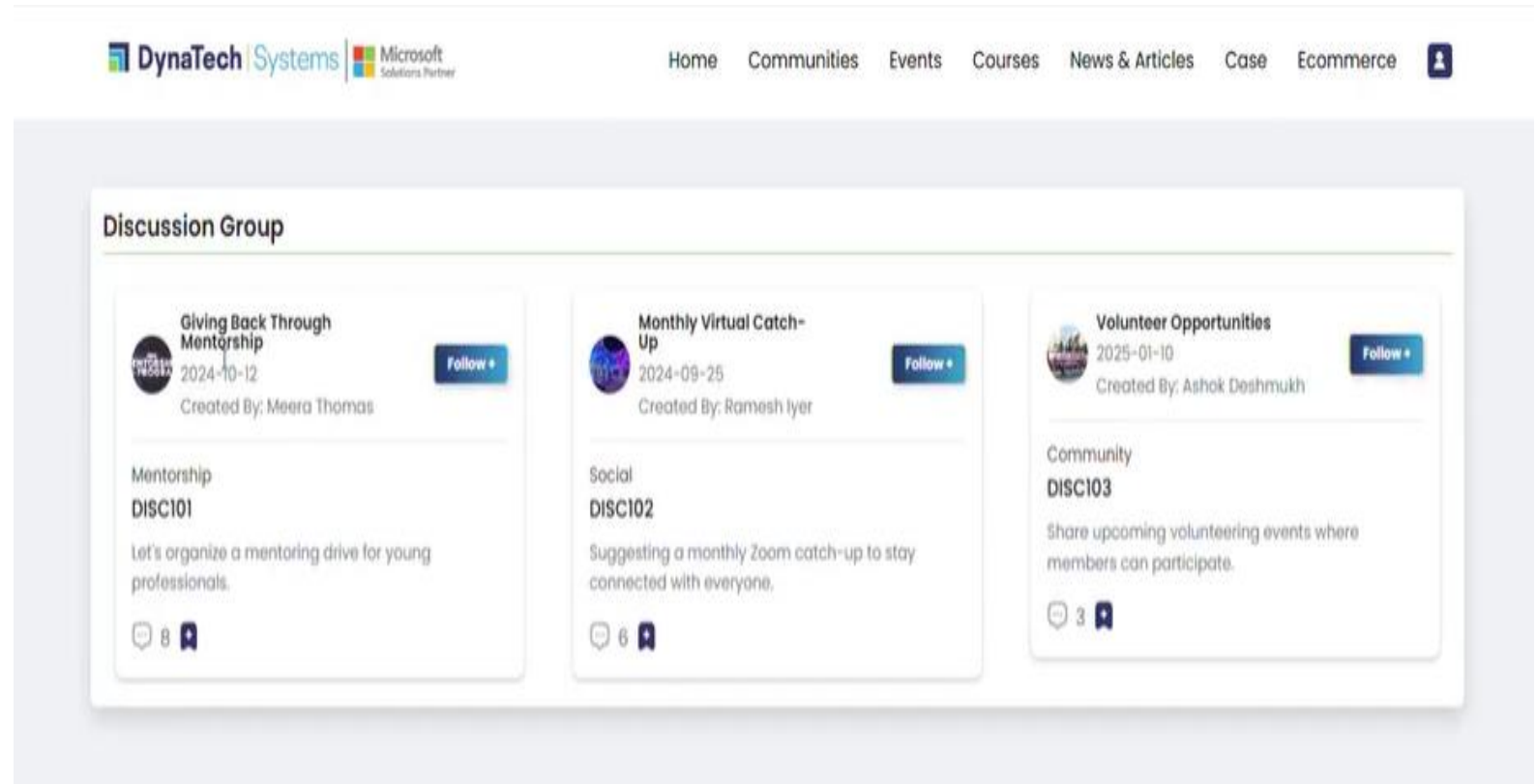


Analytics

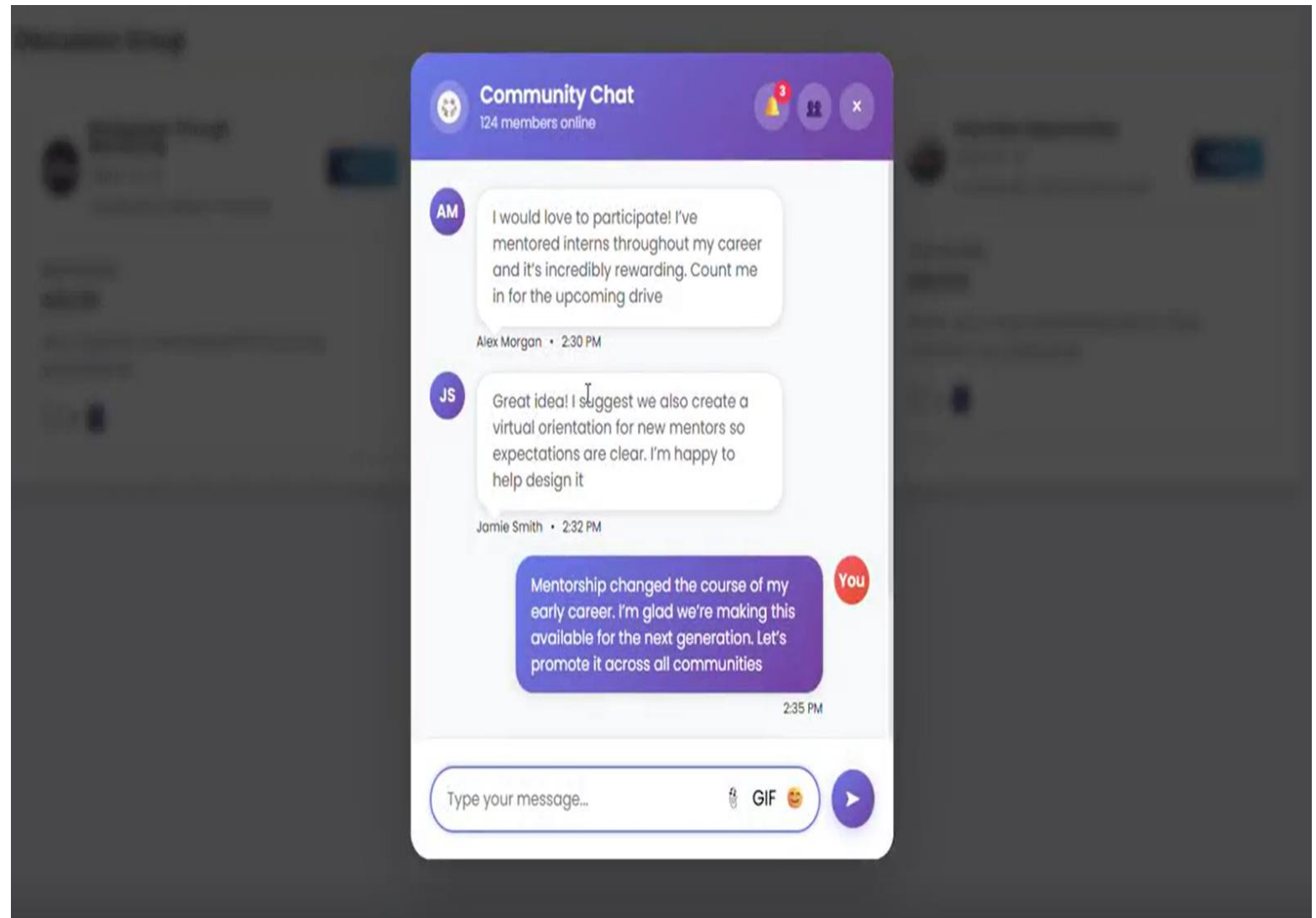
- › Build vibrant member communities with secure collaboration spaces.
- › Discover people via rich Member Directory and connect by chapter/interest.
- › Host forums & discussions, publish news & articles, and manage volunteers & committees.
- › Recognize contributions with badges & awards to fuel engagement.
- › Dashboards track participation, sentiment, and program impact.



- › Searchable directory of members and organizations with profile cards (photo, role, chapter, skills).
- › Filters: location, industry, interests, certifications, committee roles.
- › Privacy-aware: members choose visibility of phone/email, social links.
- › One-click actions: connect, message (portal inbox), follow, or invite to groups.
- › Admin controls for verification, profile completeness nudges, and abuse reporting.



- › Topic-based forums (e.g., training, legislation, chapter rooms) with threads, replies, and @mentions.
- › Moderation tools: pin/lock, flag review, move/merge topics, profanity/spam filters.
- › Rich posts: images, files, code/quote blocks, polls; subscribe to threads or tags.
- › Engagement signals: likes/reactions, accepted answers, “best reply” badges.
- › CRM sync: participation logged on the member timeline for engagement scoring.



- › Secure “My Groups” spaces for committees, volunteer teams, projects.
- › Features: announcements, threaded discussion, shared files (minutes, charters), and calendars.
- › Optional embed with Microsoft Teams/SharePoint; SSO keeps access seamless.
- › Role-based access via Web Roles & Table Permissions; private vs public views.
- › Notifications: new thread, file update, meeting reminders; audit trail retained.

Active Community Members

Member ID	Member	Email	Created On
MI-1003	Anette Henriks...	Anette@dynat...	7/15/2025 8:00...
MI-1002	Alejandro Pom...	Alejandra@dy...	7/30/2025 8:00...
MI-1001	Anika Bailey	Anika@dynate...	7/14/2025 8:00...

Active Reply / Comments

Reply ID	Member	Discussion	Reply Like	Created On
RC-1003	demo V1 user	DISC101		7/25/2025 12:27 PM
RC-1004	demo V1 user	DISC101		7/25/2025 12:27 PM
RC-1001	demo V1 user	DISC101		7/25/2025 12:27 PM
RC-1002	demo V1 user	DISC101		7/25/2025 12:27 PM
RC-1000	Ahmet Turan	DISC101	1	7/25/2025 12:26 PM

1

› Opportunities authored in CRM (title, skills, location, duration, openings, related event/committee).

2

› Portal listing with filters (skills, availability, onsite/remote, duration).

3

› Members mark Interested or Apply; interest logs contribute to engagement score.

4

› Auto-expiry/close rules keep listings fresh; dashboard shows active/history.

1

› Guided Apply Now form (prefilled profile, availability, experience, resume).

2

› CRM workflow: Submitted → Review → Shortlisted → Approved/Rejected with email updates.

3

› Skills & interests captured on profile; opportunities tagged with required/preferred skills.

4

› Matching logic shows Recommended for You with Fit Score (Excellent/Good/Low).

5

› Coordinators filter by skills/history and assign to opportunities or committees.

1

- › Create committees/subcommittees with purpose, term dates, and role roster (Chair, Co-chair, Secretary, Member).

2

- › Auto-notify assignees; portal shows My Committees (active roles, past terms, documents, meetings).

3

- › Term tracking & limits (e.g., 2-year terms, max 2 terms); 30-day pre-expiry reminders.

4

- › Reports: active rosters, upcoming expirations, tenure history for nominations and leadership pipeline.

1

› Volunteers log hours by opportunity/committee; Submitted → Approved workflow with coordinator review.

2

› Running totals by event/campaign/month & lifetime; thresholds trigger badges (10, 50, 100+ hours).

3

› Auto-award badges/certificates; display on profiles and leaderboards (optional).

4

› Dashboards: top contributors, trends, spotlight candidates; export for newsletters/events.

1

› Structured publishing in portal: categories (chapters, advocacy, training), tags, author bios.

2

› Editorial workflow: draft → review → publish; schedule posts and feature highlights.

3

› Personalization: show relevant articles by member type/interest/region.

4

› Cross-promo: embed CTAs to events, courses, or volunteer drives.

5

› Analytics: reads, time-on-page, click-throughs; A/B test headlines and hero images.

1

› Award types in CRM (Volunteer of the Month, Lifetime Service, Rising Star) with criteria.

2

› Open nominations via portal (reason, evidence attachments); review panel scoring.

3

› Status flow: Submitted → Under Review → Approved/Rejected; winners auto-notified.

4

› Issue digital certificates/badges; display on My Awards with social share (LinkedIn).

5

› Admin reporting by campaign/year/award to fuel PR and annual reports.

1

› Fine-grained access using CRM teams + portal Web Roles; private committees and member-only threads.

2

› Content governance: moderation queues, audit logs, and configurable retention.

3

› Consent & preferences honored across directory visibility and notifications.

4

› Abuse/spam reporting with escalation workflows; rate-limits to protect community health.

1

› Community dashboards: active users, posts/replies, response time, accepted answers.

2

› Volunteer KPIs: applications, approvals, hours logged, fulfillment rate by skill/location.

3

› Committee health: roster coverage, term expirations, meeting participation.

4

› Content analytics: top articles, forum topics, sentiment trends.

5

› Engagement scoring funnels (read → post → volunteer → committee) to guide growth tactics.

Want to know more?

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