

Empowering Customer and Member Engagement with Microsoft Dynamics CRM

Solutions for Success Education Series

Solutions for **Success**



POINT ALLIANCE

Agenda

- About Point Alliance
- Benefits of using Dynamics 365
- Solution Architecture
- Contact Request/Creation/Sync
- Group Management/Sync
- Integration Considerations
- Questions



Point Alliance

Jonathan Hamilton

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- [linkedin.com/in/jonathandavidhamilton](https://www.linkedin.com/in/jonathandavidhamilton)



Eleanor Boado

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- [linkedin.com/in/eleanorboado](https://www.linkedin.com/in/eleanorboado)



Point Alliance

- Microsoft Solutions Partner
 - Modern Work
 - Security
 - Digital & App Innovation Azure
 - Data & AI Azure
- Microsoft Gold Partner with 11 Competencies (legacy)
- 100% Microsoft Certified Team
- pointalliance.com/companyprofile



Benefits of using Dynamics 365

Dynamics 365 for group and user membership management

Centralized Client/Member Data

- **360° view of clients/members:** All contact details, engagement history, preferences, and communications are stored in one place.
- **Unified profiles:** Consolidates fragmented data across systems to create complete member records.

Automation & Efficiency

- **Dynamic membership rules:** Automatically add or remove users from groups based on attributes like company, department or job title.
- **Automated workflows:** Streamline onboarding, renewals, and communications with trigger-based processes.
- **Renewal reminders:** Sends alerts when memberships are due, improving retention without manual effort.

Dynamics 365 for group and user membership management



Insights & Reporting

- **Real-time dashboards:** Track retention, acquisition, and engagement metrics to guide strategic decisions.
- **Identify churn risks:** Spot clients/members likely to cancel and intervene proactively.



Security & Compliance

- **Role-based access:** Ensure only authorized users access sensitive data through granular permissions.
- **Error reduction:** Automation minimizes manual mistakes, reducing security risks.

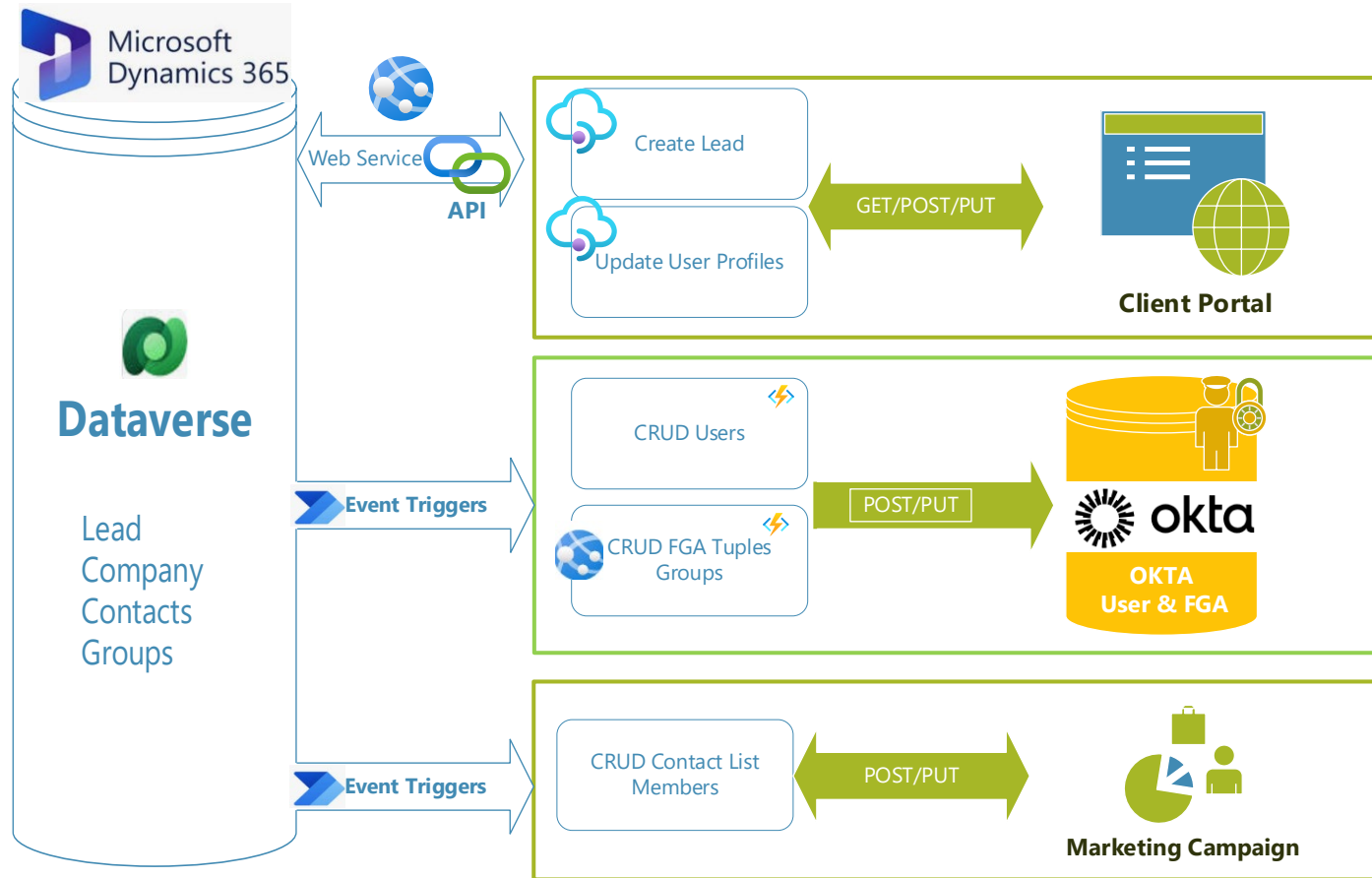


Member Engagement

- **Personalized experiences:** Tailor communications and offerings based on member data.
- **Self-service portals:** Let members update their info and manage preferences anytime.

Solution Architecture

Dynamics 365 Integration (Contact to User Account)

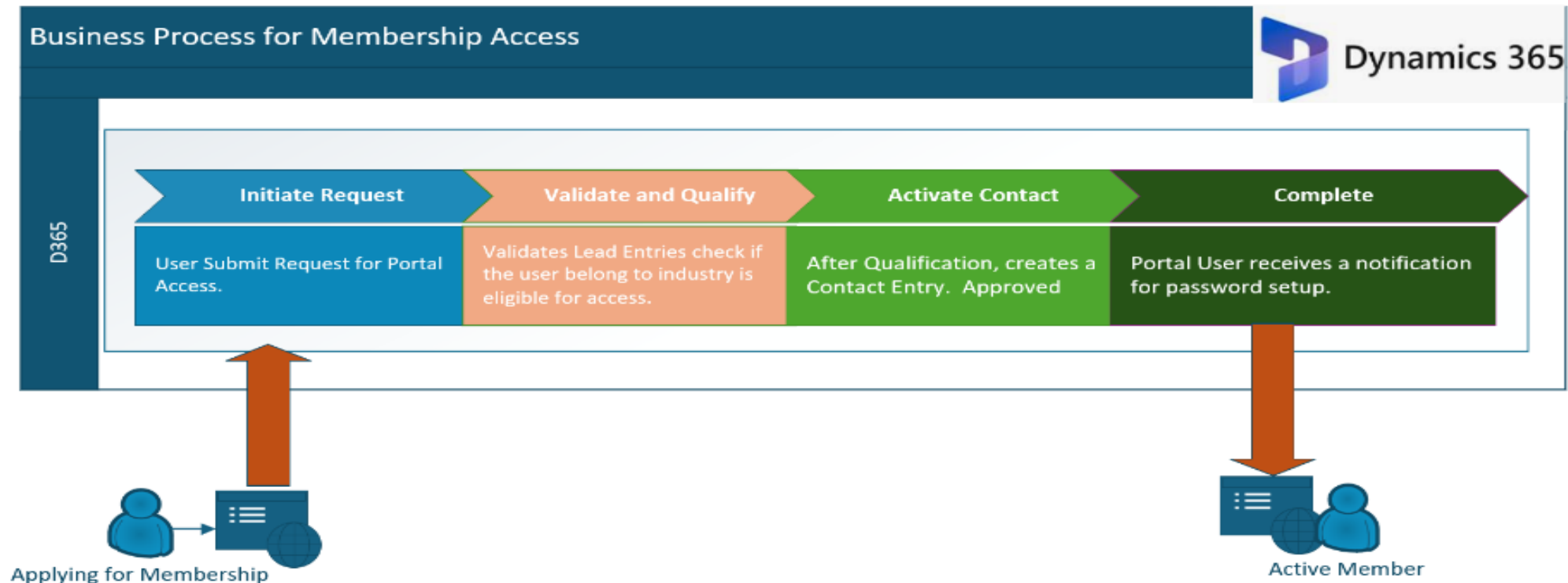


Contact

Request /

Creation / Sync

Business Process for User Access



Personal Details

Language*	Salutation	
English	Please select an option	
First Name*	Middle Name / Initials	Last Name*
Team		Training
Company*	Brand*	Job Title*
Point Alliance	Point Alliance Brand	Test Specialist

Address Details

Country* Province*

Contact Details

Email*

team.training@pointalliance.com

Phone Number (416) 777-2342

Interests

Events*

Claims and Anti-Fraud Conference

☒ Actuary

TT

Team Training - Saved Lead

Point Alliance Brand Customer

New Status

A

#ALMAcceleratorServicePrincipal

Owner

Lead to Opportunity Sal...
Active for 13 minutes

Qualify (13 Min)

Develop

Propose

Close

Summary

Details

Files

Form fill

CONTACT

Salutation
Mr.

First Name *
Team

Middle Name

Last Name *
Training

Email *
team.training@pointalliance.com

Job Title
Test Specialist

Mobile Phone

Business Phone
4167772342

Province *
Ontario

COMPANY NAME

Website

Company Name *
Point Alliance Brand

COMPANY DETAILS

Account Name *
Point Alliance Brand

Parent Company
Point Alliance

Phone *
3344445555

Street 1 *
4789 Yonge St Suite 1115

Street 2

Street 3

City *
Toronto

County

ZIP/Postal Code *
M2N 0G3

TIMELINE

Search timeline

Enter a note...

Highlights

There's not enough information to generate highlights.

Recent

Auto-post on Lead Team Training: 10:23 AM
#ALMAccelerato... created Team Training

Dynamics 365

Membership Management

Search

SANDBOX

+

?

EB

Home

Recent

Pinned

Customers

Contacts

Companies

Groups

Group Roles

Events

Event Registrations

Leads

Others

Activities

All Reports

Dashboard

Team Training - Saved

Lead

Lead to Opportunity Sal...
Active for 25 minutes

Qualify (25 Min)

Develop

Propose

Close

Summary

Details

Files

Form fill

CONTACT

Salutation

Mr.

First Name

* Team

Middle Name

Last Name

* Training

Email

* team.training@pointalliance.com

Job Title

Test Specialist

Mobile Phone

Business Phone

4167772342

Province

* Ontario

Country

* Canada

Language

* English(en-US)

COMPANY NAME

Website

Phone

* 3344445555

Street 1

* 4789 Yonge St Suite 1115

Street 2

Street 3

City

* Toronto

County

ZIP/Postal Code

* M2N 0G3

TIMELINE

Search timeline

Enter a note...

Highlights

There's not enough information to generate highlights.

Recent

Auto-post on Lead Team Training: 10:23 AM
#ALMAccelerate... created Team Training

Lead qualified successfully. A new Contact has been created.

OK



Home

Recent

Pinned

Customers

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Event Registrations

Leads

Others

Activities

All Reports

Dashboard



Show As



Show Chart



New



Delete



Refresh



Email a Link



Run Report



Export to Excel



Import from Excel



Share

All Contacts*

Edit columns

Edit filters

training



Group By: (no grouping)



Last Name



First Name

Company Name

Email

Business Phone

Status

Created By

Created On



Training

Team

Point Alliance Brand

team.training@pointalliance.com

4167772342

In-Progress

Eleanor Boado

7/12/2025 10:...

Dynamics 365

Membership Management

Search

SANDBOX

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Companies

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Group Roles

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Event Registrations

Leads

Others

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Dashboard

MMembership

Team Training - Unsaved

Contact

Point Alliance Brand

In-Progress

Eleanor Boado

Company Name

Status

Created By

Form fill

Summary

Event

Files

CONTACT INFORMATION

Salutation

Mr.

First Name

Team

Last Name

Training

Job Title

Test Specialist

Email

team.training@pointalliance.com

Business Phone

4167772342

Ext.

Mobile Phone

Direct Dial

Province

Ontario

Country

Canada

Contact Type

Full member

LinkedIn URL

Email Confirmed

No

Preferred Method of Contact

Any

Modified By

Eleanor Boado (Available)

Language

English(en-US)

COMPANY

Company Name

Point Alliance Brand

Company Type

Full member

Parent Company

Point Alliance

PUBLICATIONS

INTERESTS

Area of Interest

Actuary

Event Interests

Claims and Anti-Fraud Conference

NOTES

PORTAL UPDATE

Portal Update

No

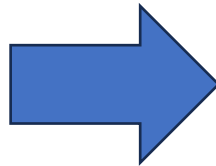
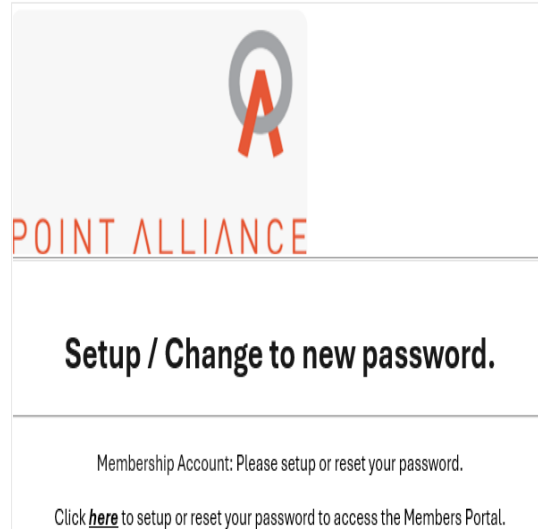
Last Login Date

Web Access

Yes

Identity Provider Example -OKTA

From: OKTA Information <adminokta@pointalliance.com>
Sent: Saturday, July 12, 2025 11:09 AM
To: Point Alliance Team Training <team.training@pointalliance.com>
Subject: Membership Activation



The password change form is titled 'Change Your Password'. It includes a prompt: 'Enter a new password below to change your password.' Below this are two input fields: 'New password*' and 'Re-enter new password*'. A 'Show password' button is located next to the first field. Below the input fields, a list of password requirements is shown with green checkmarks: 'At least 8 characters', 'At least 3 of the following: Lower case letters (a-z), Upper case letters (A-Z), Numbers (0-9), and Special characters (e.g. !@#%*&*)'. At the bottom is a blue 'Reset password' button.

Identity Provider Example -OKTA



Secure Your Account

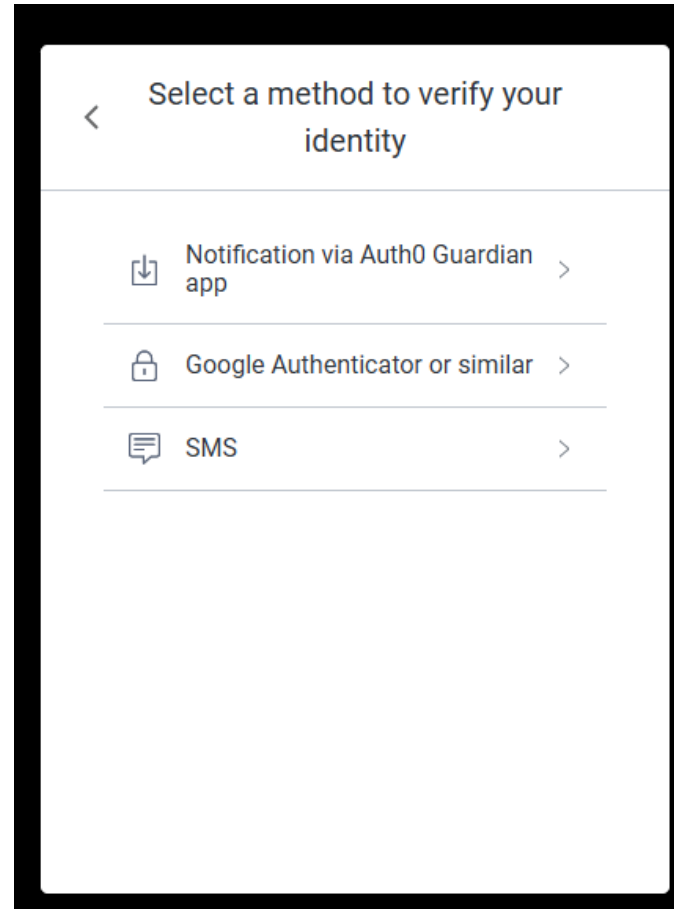
Enter your phone number below. An SMS will be sent to that number with a code to enter on the next screen.

 Canada, CA, +1 >

Enter your phone number*
XXX-XXX-XXXX|

Continue

[Try another method](#)



< Select a method to verify your identity

 Notification via Auth0 Guardian app >

 Google Authenticator or similar >

 SMS >

Last login – sync back from IDP

Dynamics 365 | Membership Management

Search

SANDBOX

Team Training - Saved
Contact

Point Alliance Brand
Company Name

Approved
Status

7/12/2025 11:08 AM
Approved Date

Eleanor Boado
Created By

Summary Groups Event Files

CONTACT INFORMATION

Salutation Mr.

First Name * Team

Last Name * Training

Job Title * Test Specialist

Email * team.training@pointalliance.com

Business Phone 4167772342

Ext. ---

Mobile Phone ---

Direct Dial ---

Province Ontario

Country * Canada

Contact Type Full member

LinkedIn URL ---

Email Confirmed No

Preferred Method of Contact Any

Modified By # ALMAcceleratorServicePrincipal

Language * English(en-US)

COMPANY

Company Name * Point Alliance Brand

Company Type * Full member

Parent Company Point Alliance

PUBLICATIONS

INTERESTS

Area of Interest * Actuary

Event Interests * Claims and Anti-Fraud Conference

NOTES

PORTAL UPDATE

Portal Update No

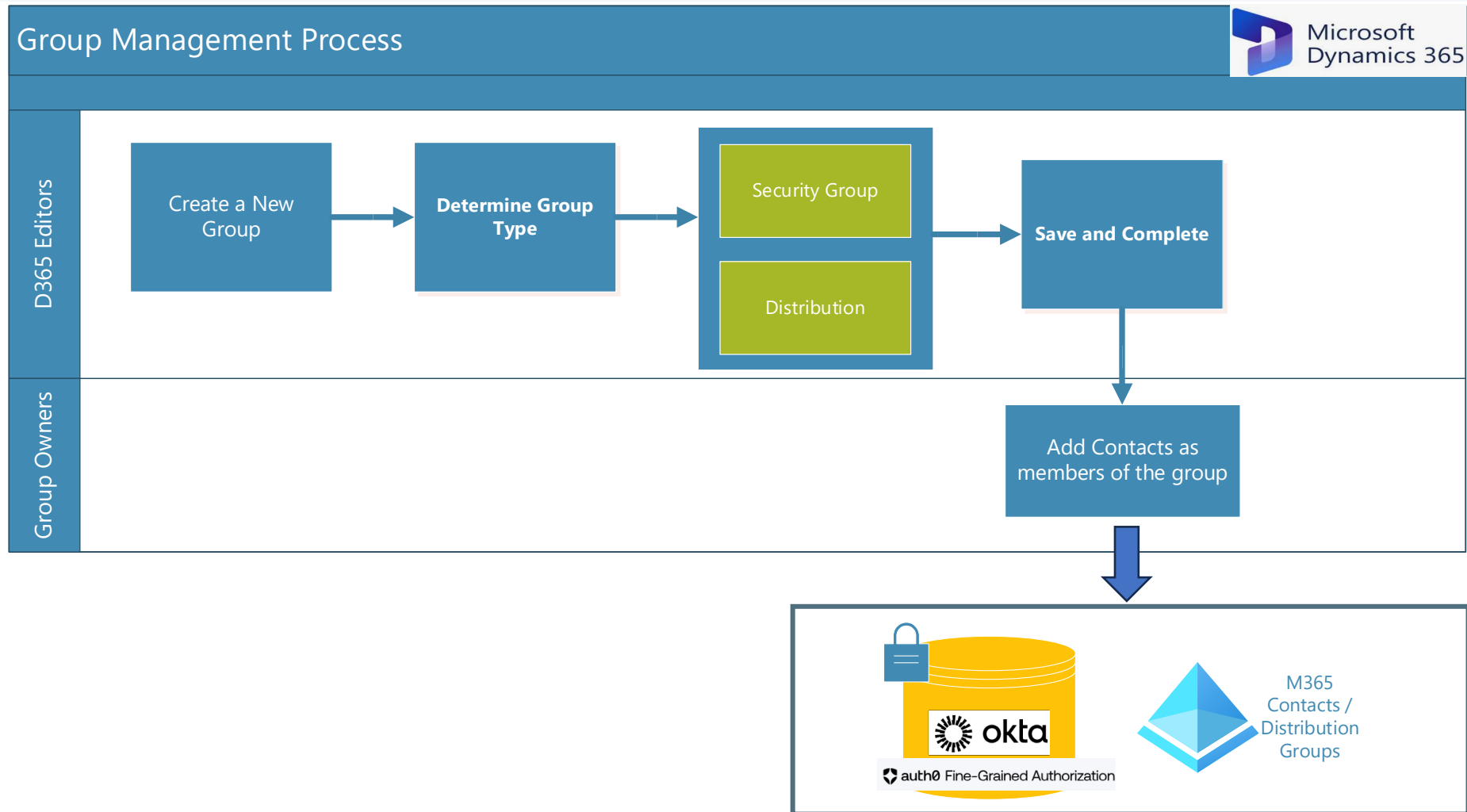
Last Login Date 7/12/2025 11:21 AM

Web Access Yes



Group Management / Sync

Business Process for Group Access



 Home Recent Pinned

Customers

 Contacts Companies Groups Group Roles Events Event Registrations Leads

Others

 Activities All Reports Dashboard

Save



Save & Close



New

New Group - Unsaved

General

Members

 Drop files or smart paste

Name

*

Disciplinary Action Group

Group Type

*

Security



Group Category

*

Other



Parent Group



Area of Interest

Terms of Reference

Disciplinary Action Group

←

↶

Save

Save & Close

+ New

Deactivate

Delete

Refresh

Word Templates

Run Report

Share

Disciplinary Action Group - Saved

Group

GeneralMembers

Active Status

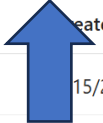
Form fill

Contact Lists

+ New Group RoleAdd Existing Group RoleRefresh

☐	Last Name (Contact Name) ▾	First Name (Contact Name) ▾	Company Name (Contact Na... ▾	Role Type ↑ ▾	Committee Name ▾	Created On ▾	Owner ▾	M365 ▾	
☐	Training	Team	Point Alliance Brand	Member	Disciplinary Action Group	7/15/2025 10:1...	 Eleanor B...	Failed - ...	
☐	(Pointalliance)	Eleanor	Point Alliance Brand	Member	Disciplinary Action Group	7/15/2025 10:1...	 Eleanor B...	In-Progr...	

Rows: 2





Home

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Customers

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Companies

Groups

Group Roles

Events

Event Registrations

Leads

Others

Activities

All Reports

Dashboard



Save



Save & Close

New Group Role - Unsaved

General



Drop file

Role Type



Member

Contact Name

Team Training

Web Access



Yes

Committee Name

Disciplinary Action Group

Membership Type



Security

Owner



Eleanor Boado (Available)

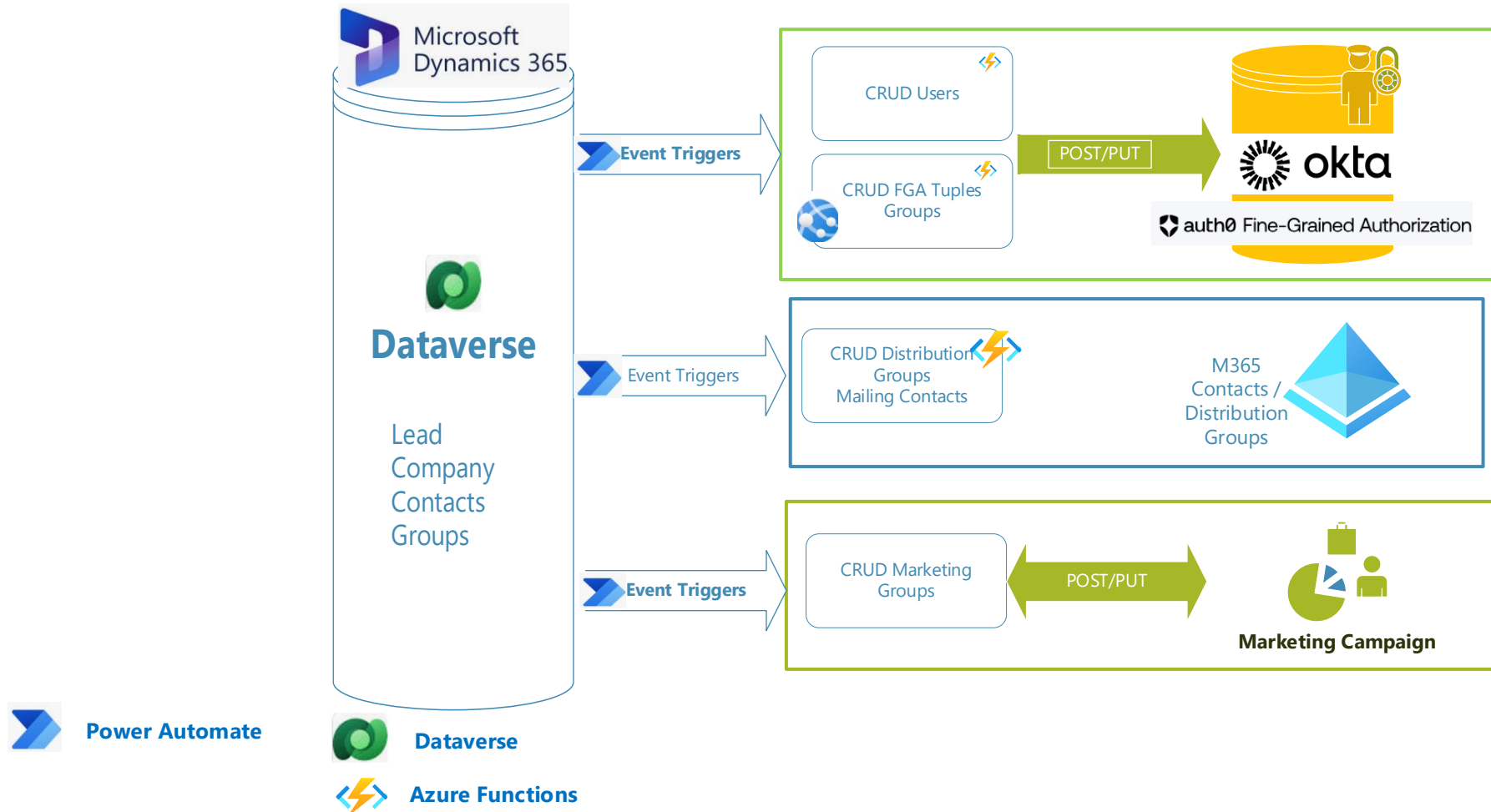
Modified On



Modified By



Dynamics 365 Integration (Groups to FGA tuples)



Autho - Fine Grain Authorization

New Group Role - Saved

Group Role

General

Role Type

*🔒 Member

Contact Name

🔒🔗 Team Training

Web Access

🔒 Yes

Committee Name

🔒🔗 Disciplinary Action Group

Membership Type

*🔒 Security

Owner

*🔒👤 Eleanor Boado (Available)

Modified On

🔒 7/15/2025

Modified By

🔒👤 # Jaspreet (D365) (Offline)



auth0 Fine-Grained Authorization

ENTERPRISE

SELECT STORE ?

🇺🇸 okta-fga-dev

⚡ Getting Started

🗃 Model Explorer

📖 Tuple Management

⚙ Developer Mode

⚙ Settings

Tuple Management

Manage relationship tuples to store your application's authorization data. A tuple represents a [relationship](#). [Learn more](#)

Tuples

di

+ Add Tuple

USER	user:team.training@pointalliance.com
OBJECT	group:disciplinary-action-group
RELATION	member

Integration Considerations

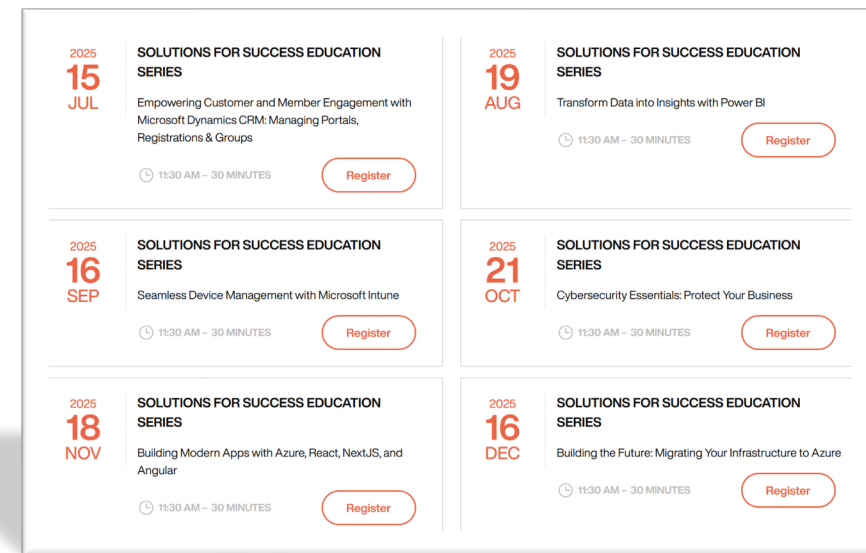
Integrations

- **Approaches**
 - Microsoft D365 APIs
 - PowerAutomate
 - Microsoft Graph API
 - PowerShell scripts
- **Logging/Monitoring/Troubleshooting**
 - Documentation
 - Notifications
 - Bulk data syncs
 - Centralized data logging

Upcoming Events

Upcoming S4S Webinars

- Third Tuesday of Each Month
- pointalliance.com/events



The image displays a grid of six upcoming webinars, each with a date, title, description, duration, and a register button. The webinars are part of the 'Solutions for Success Education Series'.

Date	Topic	Description	Duration	Register
2025 15 JUL	SOLUTIONS FOR SUCCESS EDUCATION SERIES	Empowering Customer and Member Engagement with Microsoft Dynamics CRM: Managing Portals, Registrations & Groups	11:30 AM - 30 MINUTES	Register
2025 16 SEP	SOLUTIONS FOR SUCCESS EDUCATION SERIES	Seamless Device Management with Microsoft Intune	11:30 AM - 30 MINUTES	Register
2025 18 NOV	SOLUTIONS FOR SUCCESS EDUCATION SERIES	Building Modern Apps with Azure, React, NextJS, and Angular	11:30 AM - 30 MINUTES	Register
2025 19 AUG	SOLUTIONS FOR SUCCESS EDUCATION SERIES	Transform Data into Insights with Power BI	11:30 AM - 30 MINUTES	Register
2025 21 OCT	SOLUTIONS FOR SUCCESS EDUCATION SERIES	Cybersecurity Essentials: Protect Your Business	11:30 AM - 30 MINUTES	Register
2025 16 DEC	SOLUTIONS FOR SUCCESS EDUCATION SERIES	Building the Future: Migrating Your Infrastructure to Azure	11:30 AM - 30 MINUTES	Register

Leave us a review

