

Microsoft Dynamics CRM Renovation Project



The Engineering Council of South Africa (ECSA) is pleased to announce that Phase 1 of the CRM Renovation Project was successfully deployed on 31 March 2025.

The finalisation of this phase delivered a re-engineered set of business processes and digital interfaces through the Microsoft Dynamics 365 Customer Engagement (CRM) platform and a redesigned self-service portal.

The implementation focused on three core functional areas: Registration, Continuing Professional Development (CPD), and Finance, with system integration, automation, and process governance embedded across the board.

Overview of the functionalities deployed*

Module		Functionality Included
	Registration	Candidate and Professional registration applications, Virtual Panel Members(VPM) workflows.
	CPD	Cycle creation, CPD logging, exemptions, validations, and credit summaries.
	Finance	Individual invoice generation, Secure-automated payment links.
	Portal	Full external user access: application tracking, CPD submissions, reconciliation and financial account status tracking, and access to invoices.



Registration Module

Subdomain	Description
Candidate Registration	Submission of applications by Candidates across four categories, with pre-checks for POPIA consent, supporting documents, and educational qualifications. Includes document upload via the portal and payment integration.
Professional Registration	Online applications for Professionals, including checks for referees, qualifications, and training and experience evidence. Includes workflow for registration, refusal, re-instatement, alerts for incomplete submissions and status tracking.
VPM Workflow	Enables Virtual Panel Members (VPMs) to access assigned applications and perform assessments and reviews.
Admin Queues	Registration Manager and Officer queues for vetting, approval, and finalisation of applications with status change handling in CRM.

*Kindly note the system is currently in the testing phase by internal stakeholders. External stakeholders will be invited for the end-user testing of different modules in due course. Due to the deployment of Phase one of the Microsoft Dynamics CRM Renovation Project, the self-service portal is currently under maintenance until further notice. During this time users cannot access any functionality in the portal including candidate applications, uploading profile information, accessing invoices and statements, as well as uploading of CPD credits.



CPD (Continuing Professional Development) Module

Subdomain	Description
CPD Activity Recording	Portal interface for Registered Persons to record CPD activities across Categories 1, 2, and 3.
Credit Calculation Engine	Automated credit assignment and validation based on activity category and documentation provided.
Cycle Management	Generation and tracking of CPD cycles per individual, with real-time credit summaries.
Exemption Requests	Online submission and status tracking for exemption applications.
CPD Vetting	Workflow for CPD reviewers to verify submitted activities.
Audit Workflow	Backend process for selecting individuals for CPD audit and managing the related documentation.



Finance Module

Subdomain	Description
Payment Triggers	Automated creation of financial obligations based on registration or CPD submissions.
Invoice Generation	Generation and tracking of invoices tied to application type.
Portal Integration	Presentation of payment amounts to users via the portal, with the option to redirect to third-party payment processor.
Reconciliation Support	Capturing payment confirmations in CRM, reconciling against submission statuses.



Portal Interface (External Users)

Component	Description
Self-Service Dashboard	For applicants, Registered Persons, and CPD contributors to view status, submit applications and CPD compliance, and download documentation.
Document Upload	Integration with document management systems for secure file submission.
Status Tracking	Real-time feedback on application progress, CPD compliance, and payments.



Integration and Governance

- Full alignment with POPIA for user consent validation.
- Queue management and SLA tracking embedded into CRM processes.
- Process-specific validation and alerts to ensure data completeness and compliance.
- Role-based access and audit trails for all user interactions.