

Insurance Accelerator for Microsoft Dynamics

The Unify Dots' Insurance Management accelerator built on Dynamics 365 Customer Engagement helps sales teams manage pipelines for new policies and renewals. They can track lead sources and referrals and receive auto-reminders for policy renewals. Policy holders can get support through web portals or chatbots, initiate and track claims. Potential new customers can buy policies online with appropriate workflow based on the policy type. The contact centre team benefits from a 360-degree view of the policy holder in one system, including personal and contact details, inquiries, policies, claims, and cases thus improving first contact resolution time.

About Unify Dots

UNIFY Dots helps you connect the Dots by providing solutions that enable digital transformation. Unify Dots specializes in AI-powered CRM, Customer Engagement, ERP, Field Service, Project Operations, Ecommerce and Point of Sale solutions.

AI Agents and Copilot enabled work	Finance, Accounting, Treasury, Budgeting, Financial Reporting	Supply Chain, Order Management, Manufacturing and WMS	CRM: Sales, Service, Field Service
Human Resources Management and Talent	Shop floor management, Sustainability and ESG	Data Analytics, Business Intelligence	Customer Experience - Customer Data Platform and Marketing
Power Platform – Power Apps, Automate	IP: Mobile Order Management, Contract Management	E-Commerce & POS	Industry Accelerators –Manufacturing, Agri, Insurance, Maritime, Real Estate

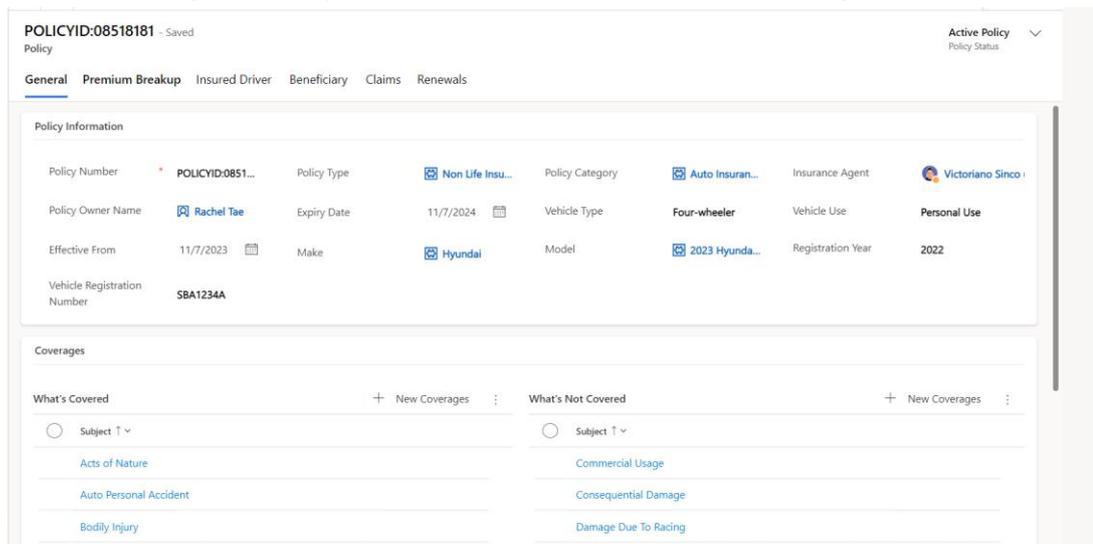
Unify Dots has local presence in Asia Pacific, Australia, New Zealand, Europe, North America and operate on a global scale with a local touch. Unify Dots is also committed to improving the world and has pledged to donate at least 25% of its profit towards the case of helping educate children from low-income families in developing countries.

More Information is provided below. To request a demonstration, email us at info@unifydots.com

Product Features

The Unified Insurance accelerator provides:

1. Tailored flows for the following processes:
 - a. Lead to policy process
 - b. Policy renewals process
 - c. Claim to settlement process
2. Ability to track policies by policy type, category, and validity.
3. Policy details like coverages, riders, premium, insured and beneficiaries in a single view.



POLICYID:08518181 - Saved Active Policy Policy Status

Policy

General Premium Breakup Insured Driver Beneficiary Claims Renewals

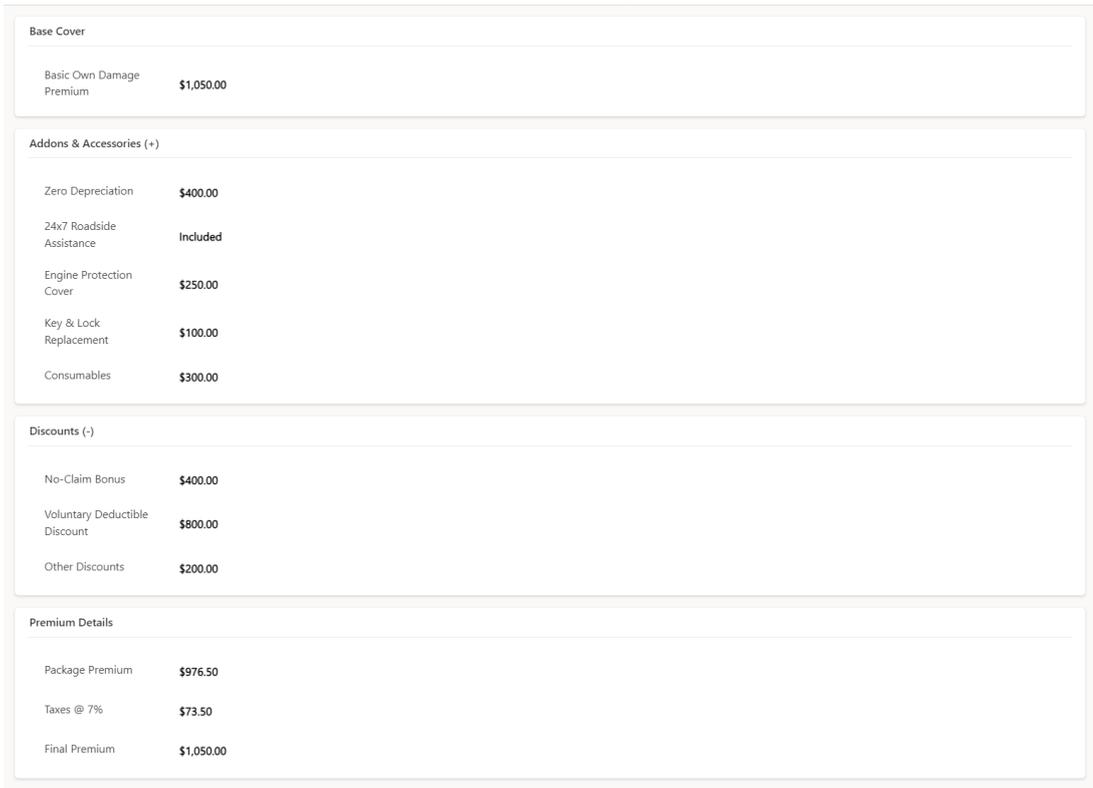
Policy Information

Policy Number	* POLICYID:0851...	Policy Type	Non Life Insu...	Policy Category	Auto Insuran...	Insurance Agent	Victoriano Sinco
Policy Owner Name	Rachel Tae	Expiry Date	11/7/2024	Vehicle Type	Four-wheeler	Vehicle Use	Personal Use
Effective From	11/7/2023	Make	Hyundai	Model	2023 Hyunda...	Registration Year	2022
Vehicle Registration Number	SBA1234A						

Coverages

What's Covered	+ New Coverages	What's Not Covered	+ New Coverages
Subject 1		Subject 1	
Acts of Nature		Commercial Usage	
Auto Personal Accident		Consequential Damage	
Bodily Injury		Damage Due To Racing	

Insurance policy details and coverage summary in D365



Base Cover

Basic Own Damage Premium	\$1,050.00
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Addons & Accessories (+)

Zero Depreciation	\$400.00
24x7 Roadside Assistance	Included
Engine Protection Cover	\$250.00
Key & Lock Replacement	\$100.00
Consumables	\$300.00

Discounts (-)

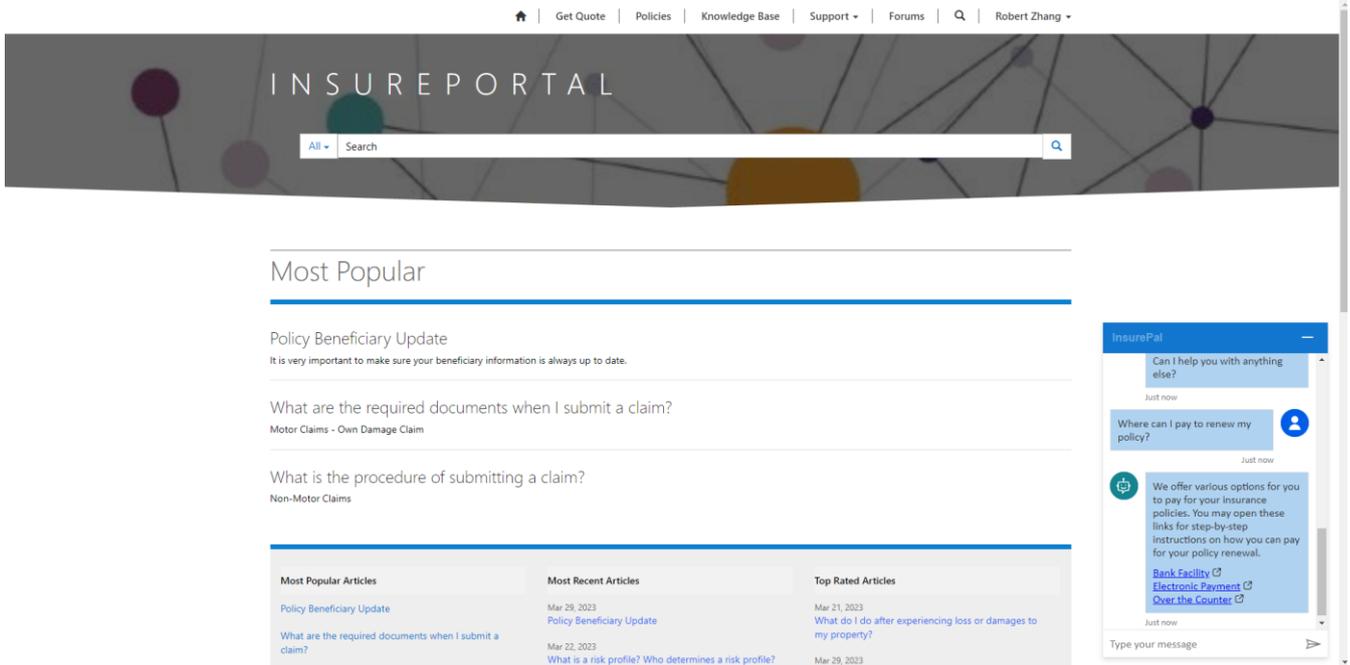
No-Claim Bonus	\$400.00
Voluntary Deductible Discount	\$800.00
Other Discounts	\$200.00

Premium Details

Package Premium	\$976.50
Taxes @ 7%	\$73.50
Final Premium	\$1,050.00

Image: Policy Premium

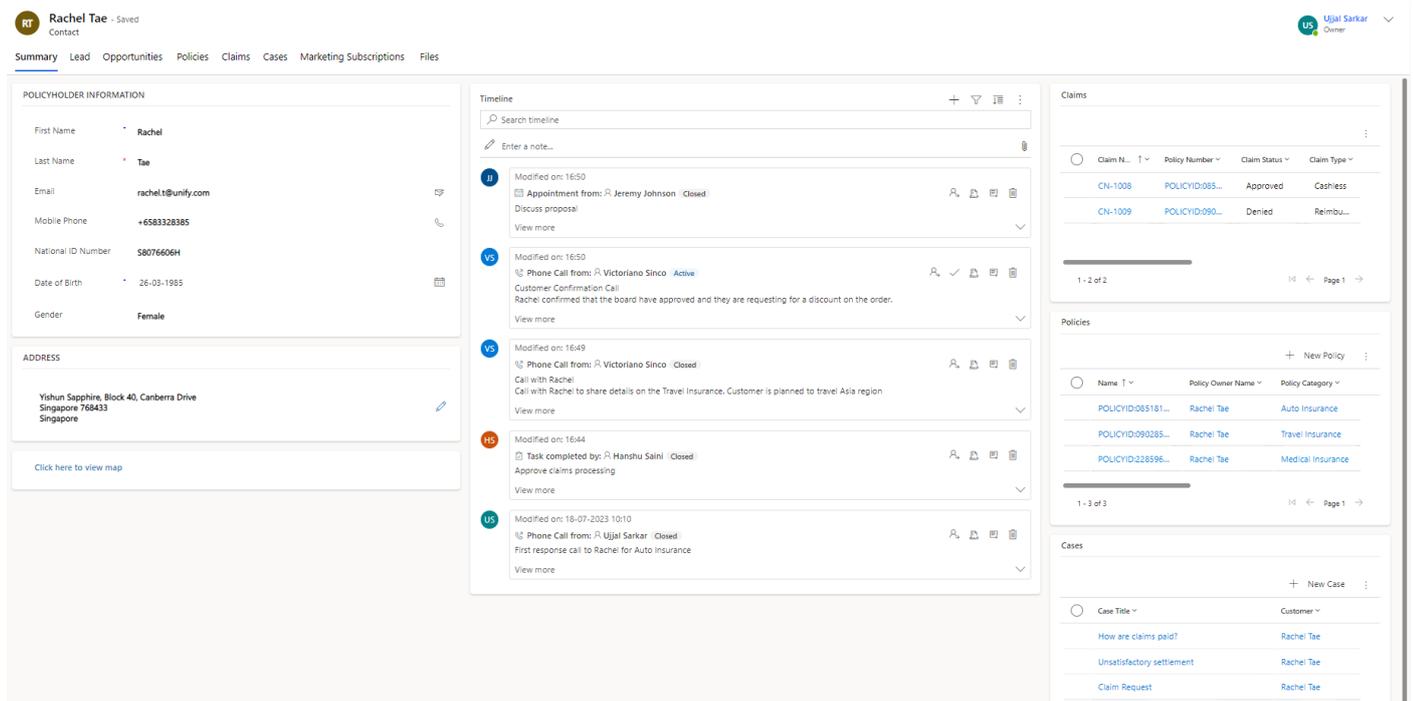
4. Ability for policy holders to inquire about a policy, or file a claim or complaint over a chatbot or portal.
5. Capability for automatic case creation from chatbot and email



The screenshot shows the 'INSUREPORTAL' website. At the top, there is a navigation bar with links for 'Get Quote', 'Policies', 'Knowledge Base', 'Support', 'Forums', and a user profile for 'Robert Zhang'. Below the navigation is a search bar. The main content area is titled 'Most Popular' and features three articles: 'Policy Beneficiary Update', 'What are the required documents when I submit a claim?', and 'What is the procedure of submitting a claim?'. To the right, there is a chatbot interface titled 'InsurePal' with a conversation about policy renewal options.

Tailored support over portal and chatbot using D365 and Power virtual agents

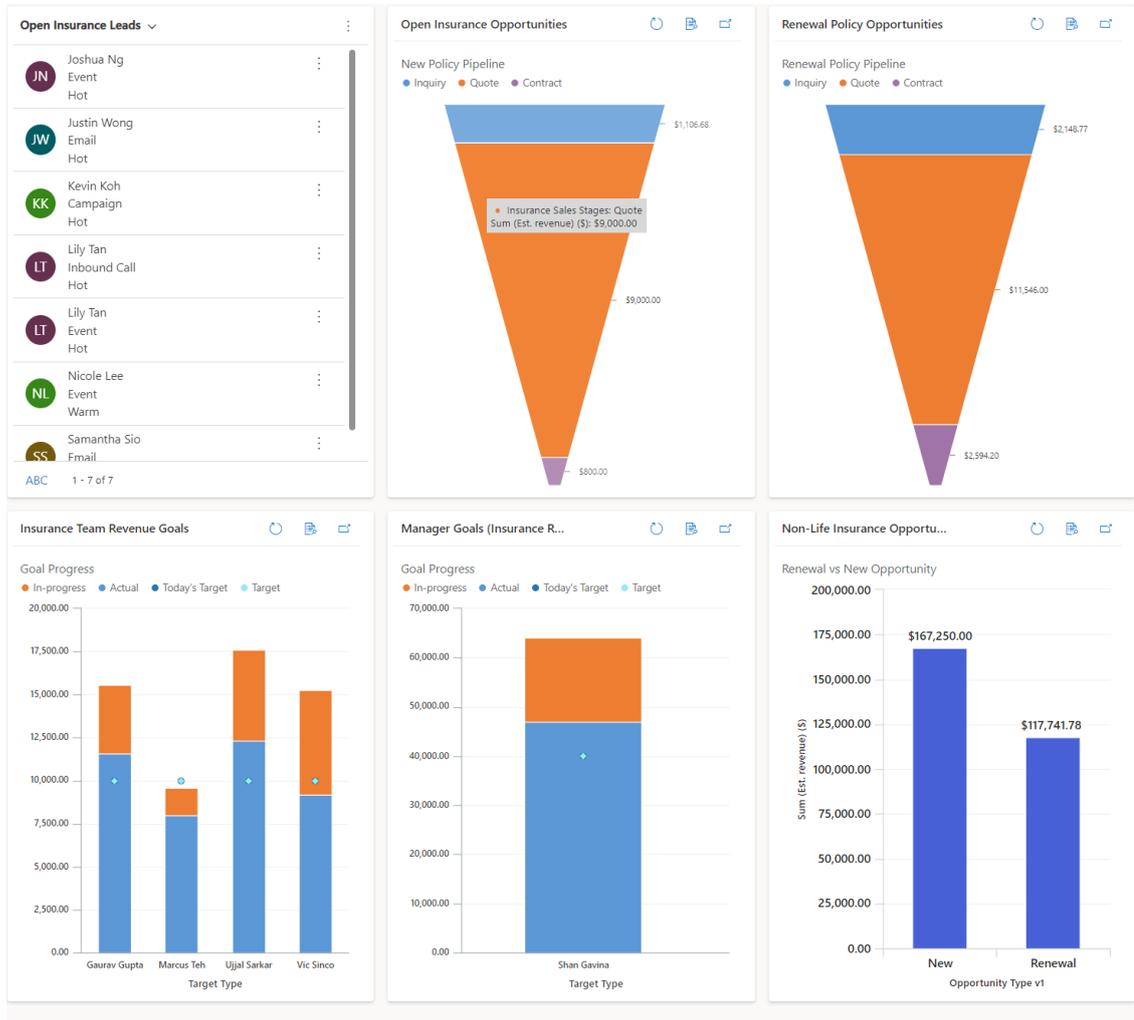
6. Claim status on the customer portal.
7. 360 degree view of policy holders with their personal and contact details, policies and claim history, renewals and claims.



The screenshot displays a 360-degree customer view for 'Rachel Tae'. The left sidebar contains 'POLICYHOLDER INFORMATION' with fields for First Name, Last Name, Email, Mobile Phone, National ID Number, Date of Birth, and Gender. Below this is the 'ADDRESS' section. The main area is divided into three panels: 'Timeline' showing a history of interactions (e.g., 'Appointment from: R. Jeremy Johnson', 'Phone Call from: R. Victoriano Sinco'), 'Claims' showing a table of claim records, and 'Policies' showing a table of active policies. A 'Cases' section is also visible at the bottom right.

Policyholder 360 degree view showing policies, claims, cases in D365

- Out of the box analytics and dashboards to track new insurance opportunities, renewals and both renewal and new policy goals to actuals.



Sales Manager Dashboard to track policy renewals and new policy opportunities

Platform: Unify Dots' Insurance Management solution is an insurance specific accelerator built on the Microsoft Dynamics 365 Sales and Customer Service applications and runs on the Microsoft cloud.

Key Benefits

The Unified Insurance solution provides the following benefits to Insurers

- Improvement in customer satisfaction by providing self-service capabilities.
- Reduction in operating costs by automating customer support through chatbots and virtual agents.
- Reduction in policy renewal costs by leveraging chatbots, a policy holder portal and a rich knowledge base that provide information to a customer. The chatbots also help with an assisted renewal by leveraging the AI built in the CoPilot solution
- Beter tracking of strong sales performers versus weak ones.
- Automated lead capture for basic information like policy type, customer profile information to reduce sales handling time and ensure sales person has a targeted conversation with the prospective customers.



Unifying the Dots in your Business



Contact Unify Dots

Email us at info@unifydots.com to get more information on implementing Unify Dots' Insurance solution or contact us by calling one of our office locations or visit us at <https://unifydots.com>.

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