

Unified Order Management for Microsoft Dynamics

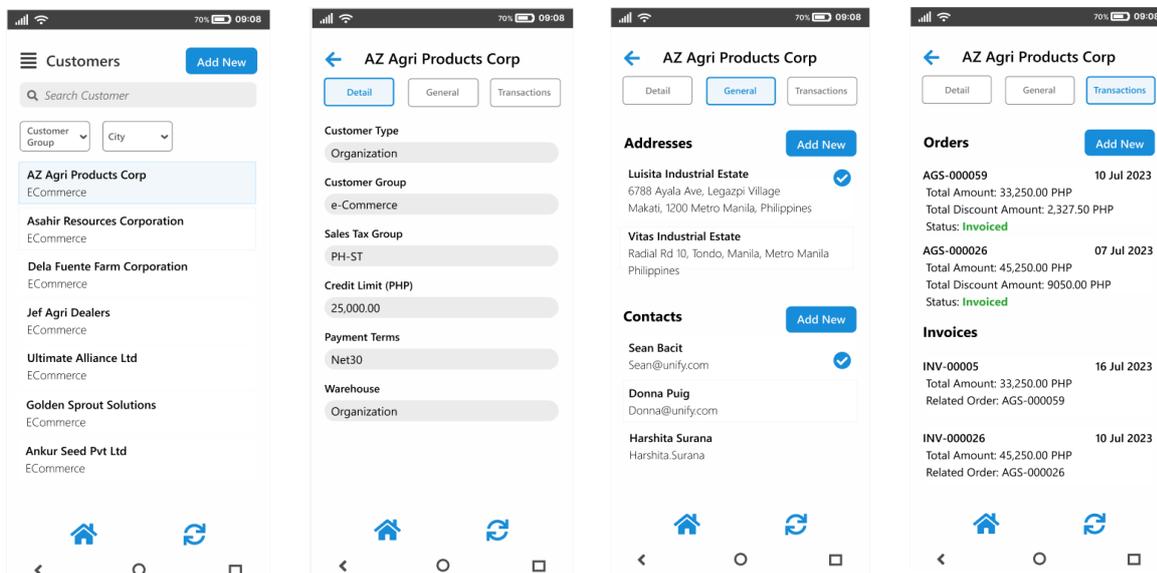
Accelerate your Revenue through Field Sales Growth

Unify Dots' Order Management mobile app empowers field salespeople to place sales orders on the go, with instant visibility into customer credit limits and receivables. Orders can be placed online or offline, with customer-specific prices and access to real-time inventory information.

Product Features

Ability for field staff to do the following on a mobile device:

1. Add new customers.
2. View Customer information including contact information, order history, invoices, and customer specific pricing.
3. View and update customer contact information
4. Capture and log visit information including photos captured from the mobile device.
5. Create sales quotes with customer-specific pricing.
6. Create sales orders with customer-specific pricing.
7. View customer credit limit, open Accounts Receivable balance, invoices payment status
8. Record special requirements for orders.

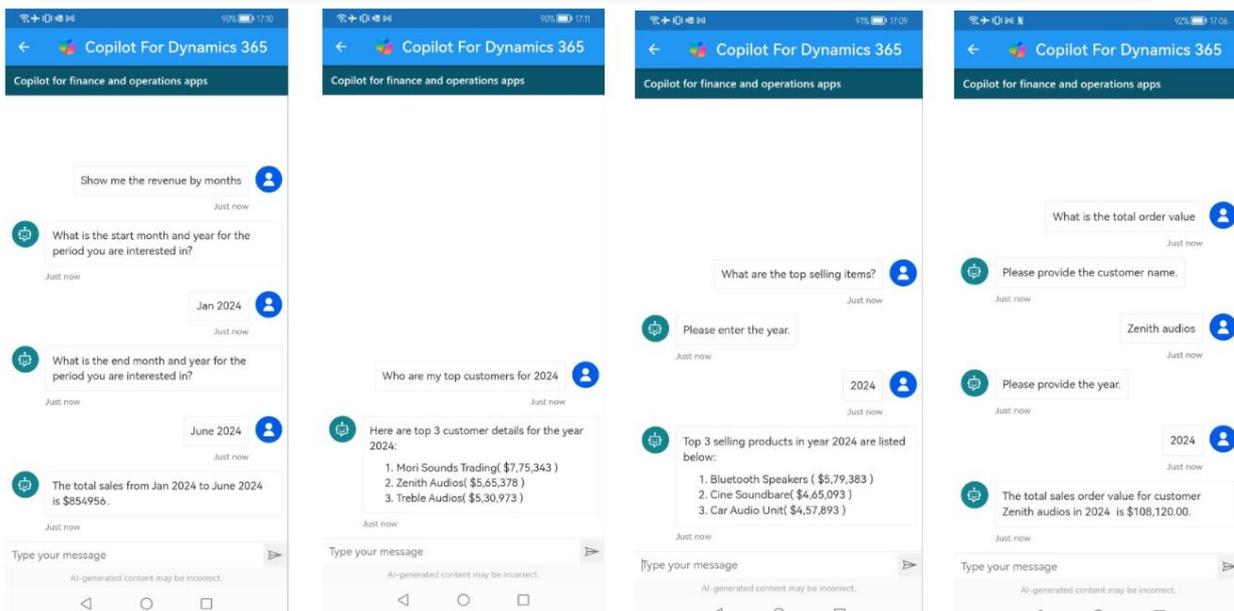


Powered by Generative AI

The Unified Mobile Order Entry for Microsoft Dynamics solution harnesses the power of Generative AI to and streamlines the ordering process. By utilizing advanced natural language processing, the solution can intelligently interpret and process voice commands and text inputs, enabling users to quickly and accurately place orders without the need for manual data entry. The AI-driven system can also provide real-time recommendations based on historical order data, customer preferences, and current inventory levels, ensuring optimal decision-making and improved customer satisfaction. Additionally, the Generative AI capabilities facilitate predictive analytics, helping businesses anticipate demand, manage stock levels efficiently, and reduce operational costs.

Examples of AI-enabled functionality include

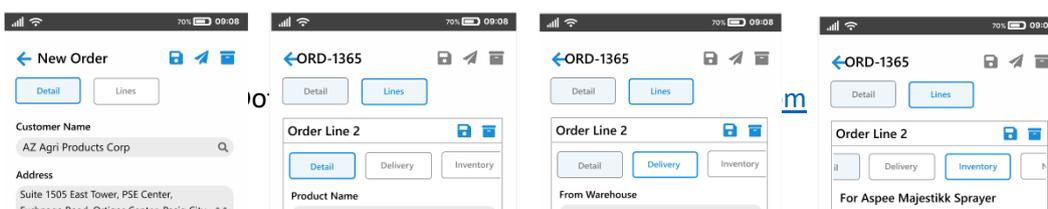
- **Voice driven ordering**
- **High value Customers** – Predict your best customers based on past history and their order history
- **Recommended Products** –AI generated personalized recommendation list of items for each customer.
- **Product literature** – Automatically generate personalized product information for customers based on the recommended products.



Key Benefits

Place Orders Anytime, Anywhere, Online or Offline

1. Place Orders when online or offline with ability to synchronize offline orders when internet connectivity is available.
2. Instant inventory visibility
3. Ability to mark inventory for an order to ensure guaranteed delivery to a customer.
4. Apply discounts within allowed discount empowerment.

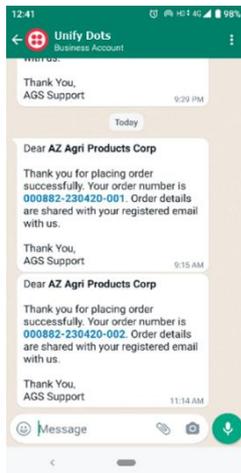


Robust Security

1. Multi-factor authentication with mobile OTP
2. Security scope is maintained allowing staff to only view data such as customers, items, orders based on their security authorization.

Ease of Use

1. Mobile-optimized user interface
2. Single click re-order function allows for quick ordering.
3. Item search can be by name, item number from a single field.
4. Receive WhatsApp notification on successful order placement.



Platform Details

Supported OS: Android and iOS.

Integrated with: Microsoft Dynamics 365 Supply Chain, Microsoft Dynamics 365 Sales

Internet Connectivity: Online & Offline

Deployment: Single click self-service deployable package for a mobile device

About Unify Dots

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

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 cause of helping educate children from low-income families in developing countries.

Contact Unify Dots

Email us at info@unifydots.com to get more information on implementing Microsoft Dynamics 365 Order Management on a mobile app or contact us by calling one of our office locations or visit us at <https://unifydots.com>

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For more information on empowering your field sales and service staff email us at info@unifydots.com