



INSURANCE MANAGEMENT SYSTEM

KEY SOLUTION FEATURES

- **ACCESS**

- OUTLOOK
- TEAMS
- WEB
- MOBILE

- **LEAD MANAGEMENT**

- CREATE A NEW LEAD
- ADD LEAD DETAILS
- QUALIFY LEAD

- **CONVERSION OF LEAD INTO POLICY**

- CREATE AND QUALIFY LEAD
- CONVERSION OF LEAD INTO OPPORTUNITY
- CREATION OF QUOTE
- CONVERSION OF QUOTE TO POLICY
- CREATE PAYMENTS FOR POLICY

- **PARTY MANAGEMENT**

- PARTY - 360 DEGREE VIEW
- PARTY ADDITIONAL DETAILS

- **TEAMS AND SHAREPOINT INTEGRATION**

- **INTERMEDIARY MANAGEMENT**

- INTERMEDIARY - 360 DEGREE VIEW
- EMPLOYEE DETAILS
- ADDITIONAL DETAILS
- VISIT REPORTS
- SALES PLANNING

- **CUSTOMER SERVICE**

- CASE MANAGEMENT**

- AUTO CASE CREATION FROM EMAIL
- AUTO RESPONSE
- CASE CREATION FROM EMAIL ACTIVITY
- SLA
- KNOWLEDGE ARTICLE(KB ARTICLE)

- CLAIM MANAGEMENT**

- CLAIM IDENTIFICATION
- VALIDATION CHECK
- COVERAGES AND RISK OBJECTS
- PROVIDER QUALIFICATION

LEAD MANAGEMENT

CREATE A NEW LEAD, ADD BASIC INFORMATION AND QUALIFY LEAD

Dynamics 365 Insurance Sales & Service > Leads > Ryan Thomas

SANDBOX

+ New Delete Refresh Qualify Process Disqualify Assign Share Add to Marketing List Email a Link

RT Ryan Thomas
Lead · Lead

Lead Source: --- Warm Rating: New Status: Amit Gunjan Owner

Lead to Opportunity Sale... Active for less than one mi... | Qualify (< 1 Min) | KYC | Propose | Close

Summary Details Files Related

Contact

Topic	* Looking for Car Insurance
First Name	+ Ryan
Last Name	* Thomas
Job Title	Manager
Business Phone	6578987634
Mobile Phone	6787645678
Email	ryan.thomas@gmail.com

Timeline

Enter a note...
No records to show.

AFTER QUALIFYING LEAD AN OPPORTUNITY IS CREATED

Dynamics 365 Insurance Sales & Service > Opportunity > Looking for Car Insurance

SANDBOX

+ New Refresh Close as Won Close as Lost Recalculate Opportunity Convert to Work Order Assign Email a Link

Looking for Car Insurance
Opportunity · Opportunity

Est. Close Date: --- Est. Revenue: --- In Progress Status: Amit Gunjan Owner

Lead to Opportunity Sale... Active for 2 minutes | Qualify | KYC (< 1 Min) | Propose | Close

Summary Product Line Items Quotes Related

Topic	* Looking for Car Insurance
Policy Holder	🔗 Ryan Thomas
Account	🔗 Sky Web Solutions
Purchase Timeframe	---
Budget Amount	---
Purchase Process	---
Description	---

Timeline

Enter a note...
No records to show.

LEAD MANAGEMENT

ADD PRODUCT TO AN OPPORTUNITY

Dynamics 365 Insurance Sales & Service > Opportunity > Looking for Car Insurance **SANDBOX**

+ New Refresh Close as Won Close as Lost Recalculate Opportunity Convert to Work Order Assign Email a Link

Looking for Car Insurance
Opportunity · Opportunity

--- Est. Close Date \$0.00 Est. Revenue In Progress Status Amit Gunjan Owner

Lead to Opportunity Sale... Active for 5 minutes

Qualify KYC (2 Min) Propose Close

Summary **Product Line Items** Quotes Related

Price List [Default Price List](#)

Revenue System Calculated

+ Add Product Refresh

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended
No data available.						

Open

Dynamics 365 Insurance Opportunity > Looking for Car Insurance >> Comprehensive Car insurance **SANDBOX**

Delete Refresh Edit Properties Email a Link Flow Word Templates Run Report

Comprehensive Car insurance
Opportunity Line · OpportunityProduct

General Related

Select Product Existing Unit * [Primary Unit](#)

Branch [Car Insurance](#)

Existing Product * [Comprehensive Car insurance](#)

Pricing

Pricing Use Default

Price Per Unit \$47.50

Volume Discount \$0.00

Quantity * 1.00000

Active Save

LEAD MANAGEMENT

CREATE QUOTE FROM QUOTES TAB ON OPPORTUNITY FORM

Dynamics 365 Insurance Sales & Service > Opportunity > Looking for Car Insurance **SANDBOX**

+ New Refresh Close as Won Close as Lost Recalculate Opportunity Convert to Work Order Assign Email a Link

Looking for Car Insurance
Opportunity · Opportunity

--- Est. Close Date \$47.50 Est. Revenue In Progress Status Amit Gunjan Owner

Lead to Opportunity Sale... Completed in 10 minutes

Qualify KYC Propose Close

Summary Product Line Items **Quotes** Related

Quote ID	Name	Status	Total Amount	Effective From	Effective To	Created On
No data available.						

+ New Quote Refresh

My Work Dashboards Email Messages Phone Calls Activities Customer Party Intermediaries Sales Leads Opportunity Quotes Policy Service

Dynamics 365 Insurance Sales & Service > Quotes > Looking for Car Insurance **SANDBOX**

+ New Delete Refresh Look Up Address Activate Quote Create PDF Email as PDF Get Products Process

Looking for Car Insurance
Quote · Quote

\$47.50 Total Amount --- Effective From --- Effective To Draft Status

Summary Related

Quote ID: QUO-01023-R4G3T3
Revision ID: 0
Name: Looking for Car Insurance

PRODUCTS

Group By: (no grouping)

Pro...	Pro...	Unit	Price ...
> Compre...	N...	Primary...	\$47.50

Page 1

ADDRESSES

Bill To Street 1

Bill To Street 2

SALES INFORMATION

Opportunity
Looking for Car Insurance
Potential Customer
Sky Web Solutions

DESCRIPTION

Detail Amount: \$47.50
(-) Discount (%): ---
(-) Discount: ---

My Work Dashboards Email Messages Phone Calls Activities Customer Party Intermediaries Sales Leads Opportunity Quotes Policy Service

LEAD MANAGEMENT

ADD ADDITIONAL PRODUCT TO QUOTE FROM PRODUCTS GRID

Dynamics 365 Insurance Sales & Service > Quotes > Looking for Car Insurance >> Key Replacement Cover **SANDBOX**

My Work Dashboards Email Messages Phone Calls Activities Customer Party Intermediaries Sales Leads Opportunity Quotes Policy Service

Key Replacement Cover
Quote Line · Information

General Delivery Address Related

Select Product Existing Unit Primary Unit

Existing Product Key Replacement Cover

Pricing
Pricing Override Price

Price Per Unit	\$38.00
Volume Discount	\$0.00
Quantity	1.00000
Amount	\$38.00

Quote Looking for Car Insurance

ACTIVATE QUOTE

Dynamics 365 Insurance Sales & Service > Quotes > Looking for Car Insurance **SANDBOX**

My Work Dashboards Email Messages Phone Calls Activities Customer Party Intermediaries Sales Leads Opportunity Quotes Policy Service

Looking for Car Insurance
Quote · Quote

\$85.50 Total Amount --- Effective From --- Effective To Draft Status

Summary Related

Quote ID QUO-01023-R4G3T3
Revision ID 0
Name Looking for Car Insurance

PRODUCTS
Group By: (no grouping)
Key Repl... N... Primary... \$38.00
Compre... N... Primary... \$47.50

ADDRESSES
Bill To Street 1
Bill To Street 2

SALES INFORMATION
Opportunity Looking for Car Insurance
Potential Customer Sky Web Solutions

DESCRIPTION

Detail Amount \$85.50
(-) Discount (%) ---

Draft Save

LEAD MANAGEMENT



TOTAL AMOUNT OF QUOTE IS DISPLAYED

Dynamics 365 Insurance Sales & Service > Quotes > Looking for Car Insurance

SANDBOX

Read-only This record's status: Active

Looking for Car Insurance
Quote · Quote

\$85.50
Total Amount

Effective From: --- Effective To: --- Status: Active

Summary Related

Quote ID: QUO-01023-R4G3T3

Revision ID: 0

Name: Looking for Car Insurance

PRODUCTS

Group By: (no grouping)

Produ...	Pro...	Unit	Price ...
> Key Repl...	N...	Primary...	\$38.0l
> Compre...	N...	Primary...	\$47.5l

Detail Amount: **\$85.50**

(-) Discount (%): ---

ADDRESSES

Bill To Street 1: ---

Bill To Street 2: ---

SALES INFORMATION

Opportunity: Looking for Car Insurance

Potential Customer: Sky Web Solutions

DESCRIPTION

CREATE A POLICY

Dynamics 365 Insurance Sales & Service > Quotes > Looking for Car Insurance

SANDBOX

Read-only This record's status: Active

Looking for Car Insurance
Quote · Quote

\$85.50
Total Amount

Effective From: --- Effective To: --- Status: Active

Summary Related

Quote ID: QUO-01023-R4G3T3

Revision ID: 0

Name: Looking for Car Insurance

CREATE ORDER

Use this quote to create an order.

Status Reason: **Won**

Date Won: 20/4/2020

Description: **Comprehensive Car Insurance Policy**

Close Opportunity: **Yes**

Calculate actual revenue from quotes: **Yes**

OK **Cancel**

LEAD MANAGEMENT



CREATE A RISK OBJECT FOR A POLICY

Dynamics 365 Insurance Sales & Service > Policy > Looking for Car Insurance

SANDBOX

Looking for Car Insurance
Policy · Policy

\$85.50 Total Amount Active Status New Status Reason Amit Gunjan Owner

Summary Financials Timeline Related

Customer

Party

Intermediaries

Sales

Leads

Opportunity

Quotes

Policy

Service

Cases

Claims

Products

Bill To Street 3

Bill To City

Bill To State/Province

Bill To ZIP/Postal Code

Bill To Country/Region

Ship To

Total Amount \$85.50

Risk Objects

ENTER ALL THE DETAILS OF A RISK OBJECT

Dynamics 365 Insurance

SANDBOX

Save Save & Close New Flow

New Risk Objects

General

Name * Honda City

Owning Party Ryan Thomas

Risk Object Type Vehicle

Risk Object Value \$10,000

Purchase Date 20/4/2019

Date First Use 20/4/2019

Built Year 2019

Owner * Amit Gunjan

Vehicle

Vehicle Type Car

Vehicle Brand Honda City

Vehicle Model 2019

Engine Capacity 2000

Fuel Type ---

Plate Number ---

unsaved changes Save

LEAD MANAGEMENT



ADD A PAYMENT FOR POLICY IN FINANCIALS TAB

Dynamics 365 Insurance Sales & Service > Policy > Looking for Car Insurance **SANDBOX**

Looking for Car Insurance
Policy · Policy

\$85.50 Total Amount Active Status New Status Reason Amit Gunjan Owner

Summary **Financials** Timeline Related

✓	Name	↑	Payment Mode	Amount	Bank Name	Created On
No data available.						

+ New Policy Payments ...

ADD A NEW POLICY PAYMENT

Dynamics 365 Insurance Sales & Service > Policy > Looking for Car Insurance >> Payment for Policy **SANDBOX**

Payment for Policy
Policy Payments

General Related

Policy	Looking for Car Insurance
Name	* Payment for Policy
Payment Mode	Cash
Amount	\$48
Bank Name	ICICI Bank
Owner	* Amit Gunjan

CLAIM MANAGEMENT

CREATE A NEW CLAIM, ENTER ALL THE DETAILS

Dynamics 365 Insurance Sales & Service Claims > C_001 **SANDBOX**

+ New Deactivate Delete Refresh Process Assign Share Email a Link Flow Word Templates

C_001
Claims

Claims Management Active for 1 minute Identify (1 Min) Validation Rejected

Identify & Validation Object Provider Activity Related

Resolve Before	23/4/2020	Location
Claim Title	Car Accident	Street Blk 35 Mandalay Road
Claim ID	* C_001	City Singapore
Customer	Ryan Thomas	Postal Code 308215
Policy	Looking for Car Insurance	Country Singapore
Incident Type	Non Life	Validation
Owner	Amit Gunjan	Incident Status Rejected

Active

Dynamics 365 Insurance Sales & Service Claims > C_001 **SANDBOX**

+ New Deactivate Delete Refresh Process Assign Share Email a Link Flow Word Templates

C_001
Claims

Claims Management Active for 3 minutes Identify Validation (< 1 Min) Rejected

Identify & Validation Object Provider Activity Related

Resolve before	23/4/2020	LOCATION
Claim Title	Car Accident	Street Blk 35 Mandalay Road
Claim ID	* C_001	City Singapore
Customer	Ryan Thomas	Postal Code 308215
Policy	Looking for Car Insurance	Country Singapore
Incident Type	Non Life	Validation
Owner	Amit Gunjan	Incident Status Rejected

Active

CLAIM MANAGEMENT

CHANGE INCIDENT STATUS TO ACCEPTED, SELECT OBJECT TYPE AS VEHICLE, RISK OBJECT VEHICLE FROM OBJECT TAB

Dynamics 365 Insurance Sales & Service > Claims > C_001 **SANDBOX**


+ New Deactivate Delete Refresh Process Assign Share Email a Link Flow Word Templates



C_001
Claims

Claims Management Active for 5 minutes

Identify Validation (2 Min) Object Provider Close

Identify & Validation **Object** Provider Activity Related

Incident Status	Accepted
Object Type	Vehicle
Risk Object Vehicle	 Honda City

Name	Honda City
Plate Number	---
Risk Object Value	\$1,500
Vehicle Brand	 Honda City
Vehicle Model	2018
Vehicle Type	 Car
Engine Capacity	2400
Built Year	2018

Active

ADD PROVIDER DETAILS FROM PROVIDER TAB

Dynamics 365 Insurance Sales & Service > Claims > C_001 **SANDBOX**



+ New Deactivate Delete Refresh Process Assign Share Email a Link Flow Word Templates

C_001
Claims

Claims Management Active for 9 minutes

Identify Validation Object **Provider (1 Min)** Close

Identify & Validation Object **Provider** Activity Related

Provider Type	 Ambulance
Provider	 AMG Ambulance
2nd Provider ?	No

Active

unsaved changes Save

CLAIM MANAGEMENT



Dynamics 365 Insurance Sales & Service Claims C_001

SANDBOX

+ New Deactivate Delete Refresh Process Assign Share Email a Link Flow Word Templates

C_001
Claims

Claims Management
Completed in 14 minutes

Identify Validation Object **Provider** Close

Identify & Validation Object Provider Activity Related

Completed

✓ Provider [AMG Ambulan...](#)

Provider Type [Ambulance](#)

Provider [AMG Ambulance](#)

2nd Provider ? **No**

Service
Claims

Dynamics 365 Insurance Sales & Service Claims C_001

SANDBOX

+ New Deactivate Delete Refresh Process Assign Share Email a Link Flow Word Templates

C_001
Claims

Claims Management
Completed in 14 minutes

Identify Validation Object **Provider** Close

Identify & Validation Object Provider Activity Related

Completed

Claim Amount Approval ☐ Rejected

✓ Claim Amount **\$50**

✓ Paid Amount **\$50**

Remaining Claim Amount **\$0**

Finished ✓

Provider Type [Ambulance](#)

Provider [AMG Ambulance](#)

2nd Provider ? **No**

Service
Claims

PARTY MANAGEMENT



LIST OF ALL THE PARTIES

Dynamics 365 Insurance Sales & Service Party **SANDBOX**

Show Chart New Delete Refresh Email a Link Flow Run Report Excel Templates

Active Party

Search for records

Full Name	Email	Company Name	Business Phone
Anthony Dias	d_anthony@gmail.com	A&M Broking Services	022 65986458
Denzel Jackson	d_jack@outlook.com	ACB Broker	022 65329874
Jennifer Lee	j_lee@outlook.com	A&M Broking Services	022 88653212
John Merchant	nilam.kherade@adyatan.com	A&M Broking Services	022 65983145
Johnny Jean	john_j@outlook.com	A&M Broking Services	022 85967412
Neel Smith	knilam@gmail.com	A&M Broking Services	022 65981235
Ryan Thomas	ryan.thomas@gmail.com	Sky Web Solutions	
test1	---	---	
Tom Damon	tom_d@outlook.com	A&M Broking Services	
Will Johnson	j_will@outlook.com	ITC Broking Services	

1 - 10 of 10 (0 selected)

DETAILS OF A PARTY

Dynamics 365 Insurance Sales & Service Party Anthony Dias **SANDBOX**

New Deactivate Connect Add to Marketing List Assign Email a Link Delete Refresh Process

Anthony Dias
Party · Contact
Owner: Nilam Kherade

Summary Details Timeline Related

CONTACT INFORMATION

First Name	Anthony
Last Name	Dias
Job Title	Manager
Account Name	A&M Broking Services
Email	d_anthony@gmail.com
Business Phone	022 65986458
Mobile Phone	9869532157
Fax	---

Policies + New Policy

Policy Name	Status R...	Total Am...	Policy H...
Interested in Car Insurance Policy	New	₹2,500	Anthony Dias

Opportunities + New Opportunity

Topic	Potential...	Email Ad...	Status	Actual Cl...	Actu...
aaa	Anthony Dias...	---	Open	---	
Interested in Car Insura	Anthony Dias...	---	Won	2/4/2020	

PARTY MANAGEMENT



DETAILS OF A PARTY

Dynamics 365

Insurance

Sales & Service

Party

Anthony Dias

SANDBOX

New

Deactivate

Connect

Add to Marketing List

Assign

Email a Link

Delete

Refresh

Process

AD

Anthony Dias

Party · Contact

Nilam Kherade

Owner

Summary

Details

Timeline

Related

Fax

Company

A&M Broking Services

Preferred Method of Contact

Any

Address 1: Street 1

Address 1: Street 2

Address 1: Street 3

Address 1: City

Address 1: State/Province

Quotes

New Quote

Name	Status	Total Am...	Potential Cust
aaa	Draft	\$0.00	Anthony Dias
Interested in Car Insurance Policy	Won	₹2,500	Anthony Dias

Cases

Case Title	Case Number	Priority
Remove Additional Cov	CAS-01005-G8J8Z5	Normal
Additional Coverage	CAS-01004-C7Q8...	Normal

Dynamics 365

Insurance

Sales & Service

Party

Anthony Dias

SANDBOX

New

Deactivate

Connect

Add to Marketing List

Assign

Email a Link

Delete

Refresh

Process

AD

Anthony Dias

Party · Contact

Nilam Kherade

Owner

Summary

Details

Timeline

Related

PERSONAL

Gender

Male

Marital Status

Single

Spouse/Partner Name

Birthday

2/2/1988

Anniversary

CONTACT PREFERENCES

Contact Method

Any

Email

Allow

Follow Email

Allow

Bulk Email

Allow

Phone

Allow

Fax

MARKETING

Originating Lead

Suraj Jadhav

Last Campaign Date

Marketing Materials

Send

INTERMEDIARY MANAGEMENT

LIST OF ALL THE INTERMEDIARIES

Dynamics 365 Insurance Sales & Service Intermediaries **SANDBOX**

Show Chart New Delete Refresh Email a Link Flow Run Report Excel Templates Search for records

Active Intermediaries

Intermediary Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
A&M Broking Services	9865327412	Brussel	Tom Damon	tom_d@outlook.com
ACB Broker	8832659472	---	Denzel Jackson	d_jack@outlook.com
AMG Ambulance	---	---	---	---
ITC Broking Services	022 65983145	---	Will Johnson	j_will@outlook.com
Sky Web Solutions	6578987634	Singapore	Ryan Thomas	ryan.thomas@gmail.com

1 - 5 of 5 (0 selected)

SUMMARY OF A INTERMEDIARY

Dynamics 365 Insurance Sales & Service Intermediaries Sky Web Solutions **SANDBOX**

New Open Org Chart Deactivate Connect Add to Marketing List Assign Email a Link Delete Refresh

Sky Web Solutions Intermediaries · Intermediaries

Annual Revenue Number of Employees Owner Amit Gunjan

Summary Structure Details Visit Reports Sales Planning Related

INTERMEDIARY INFORMATION

Intermediary Name	Sky Web Solutions
Intermediary Type	Broker
Primary Contact	Ryan Thomas
Email	ryan.thomas@gmail.com
Business	6578987634
Parent Account	---
Product Price List	---

Timeline

Enter a note...

No records to show.

INTERMEDIARY

STRUCTURE OF A INTERMEDIARY

Dynamics 365 Insurance Sales & Service > Intermediaries > Sky Web Solutions **SANDBOX**

+ New Open Org Chart Deactivate Connect Add to Marketing List Assign Email a Link Delete Refresh

Sky Web Solutions
Intermediaries · Intermediaries

Annual Revenue Number of Employees **Amit Gunjan** Owner

Summary **Structure** Details Visit Reports Sales Planning Related

EMPLOYEES

+ New Party Add Existing Party

Full Name	Job Title	Email	Business Phone	Mobile Phone	Company Name
Ryan Thomas	Manager	ryan.thomas@gmail.com	6578987634	6787645678	Sky Web Solutions

DETAILS OF A INTERMEDIARY

Dynamics 365 Insurance Sales & Service > Intermediaries > Sky Web Solutions **SANDBOX**

+ New Open Org Chart Deactivate Connect Add to Marketing List Assign Email a Link Delete Refresh

Sky Web Solutions
Intermediaries · Intermediaries

Annual Revenue Number of Employees **Amit Gunjan** Owner

Summary Structure **Details** Visit Reports Sales Planning Related

COMPANY PROFILE

Industry	Brokers
SIC Code	AXY0077845
Ownership	Private

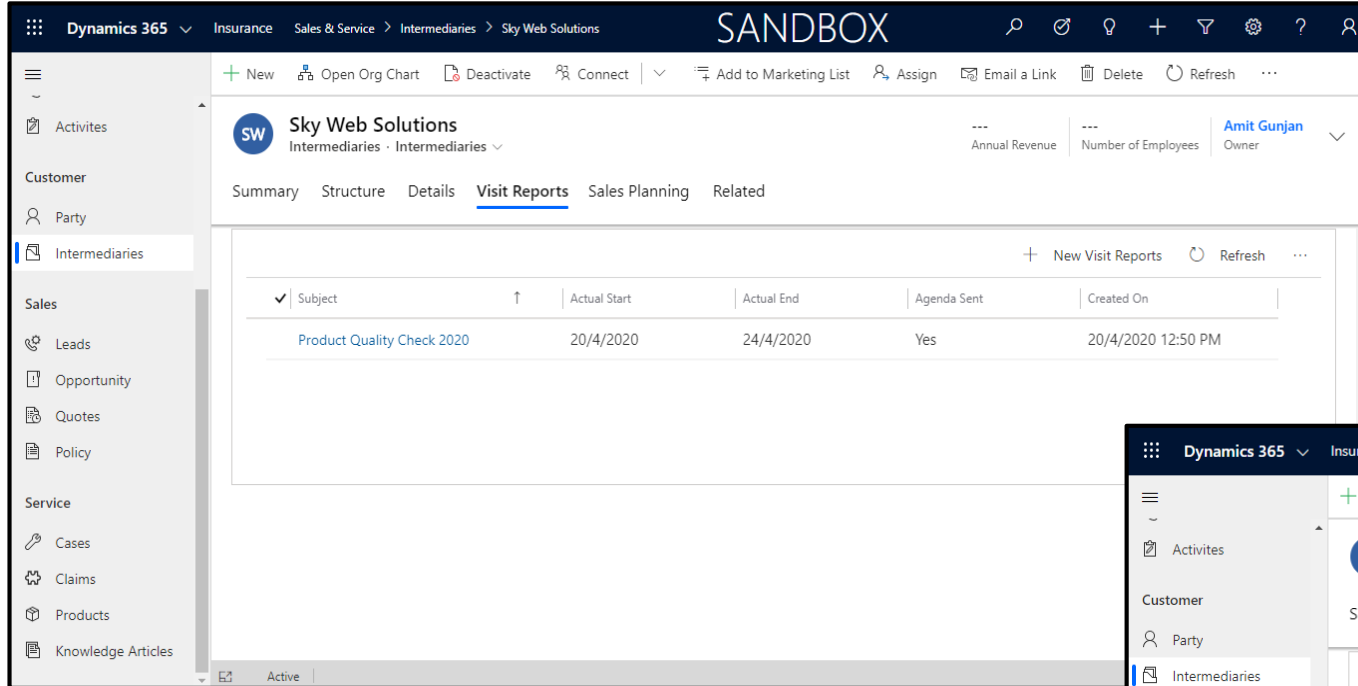
Description

CONTACT PREFERENCES

Contact Method	Any
Email	Allow
Bulk Email	Allow
Phone	Allow
Fax	Allow
Mail	Allow

INTERMEDIARY

VISIT REPORTS OF A INTERMEDIARY

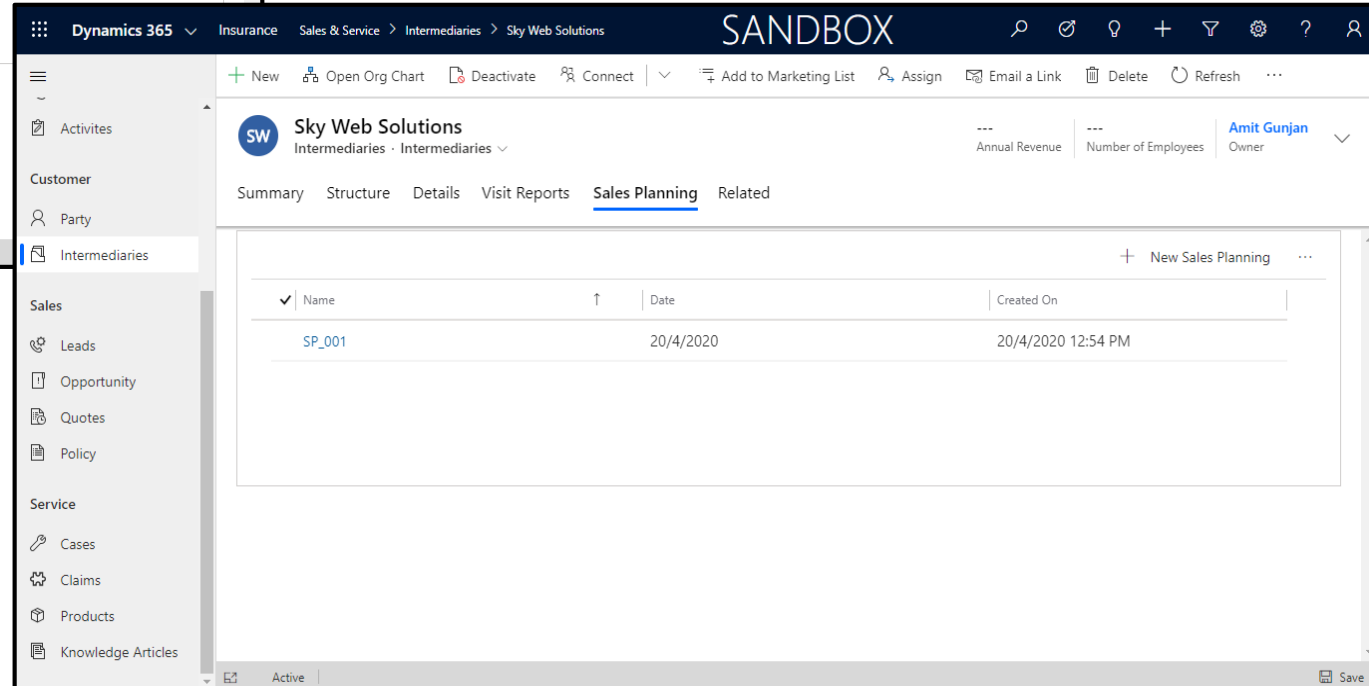


The screenshot displays the Dynamics 365 interface for the 'Sky Web Solutions' intermediary. The left-hand navigation pane includes sections for 'Customer' (Party, Intermediaries), 'Sales' (Leads, Opportunity, Quotes, Policy), and 'Service' (Cases, Claims, Products, Knowledge Articles). The main content area is titled 'Visit Reports' and features a table with the following data:

Subject	Actual Start	Actual End	Agenda Sent	Created On
Product Quality Check 2020	20/4/2020	24/4/2020	Yes	20/4/2020 12:50 PM

Additional interface elements include a top navigation bar with 'Dynamics 365' and 'Insurance Sales & Service > Intermediaries > Sky Web Solutions', a 'SANDBOX' header, and a right-hand summary card for 'Amit Gunjan' (Owner) showing 'Annual Revenue' and 'Number of Employees'.

SALES PLANNING OF A INTERMEDIARY



The screenshot displays the Dynamics 365 interface for the 'Sky Web Solutions' intermediary, specifically the 'Sales Planning' tab. The left-hand navigation pane is identical to the previous screenshot. The main content area shows a table with the following data:

Name	Date	Created On
SP_001	20/4/2020	20/4/2020 12:54 PM

The interface also includes a top navigation bar with 'Dynamics 365' and 'Insurance Sales & Service > Intermediaries > Sky Web Solutions', a 'SANDBOX' header, and a right-hand summary card for 'Amit Gunjan' (Owner) showing 'Annual Revenue' and 'Number of Employees'.

CUSTOMER SERVICE



RECEIVED MAIL IN MY WORKSPACE DASHBOARD

Dynamics 365

Insurance

Sales & Service

Dashboards

SANDBOX

Save As

New

Set As Default

Refresh All

My Workplace

Received Emails

All Activities

Active Policies

AN

Add New Coverage

Amit Gunjan

Support

pd

premium due

Nilam Kherade

Support

Rt

Request to change address in p...

Nilam Kherade

Support

Ym

Your mailbox is now connected...

Support

Ym

Your mailbox is now connected...

Support

AN

Add New Coverage

Email

pd

premium due

Email

RQ

RE: Query about Premium due

Email

Qa

Query about Premium due

Email

RA

Remove Additional Coverage

Remove Additional Coverage

Phone Call

Rt

Request to change address i...

Request to change address i...

Lf

Looking for Car Insurance

New

\$85.50

Lf

Looking for Car Insurance

New

\$85.50

Lf

Looking for Car Insurance

New

\$85.50

Lf

Looking for Car Insurance

New

\$85.50

Il

Interested

New

\$85.50

li

Interested

New

\$85.50

DETAILS OF THE EMAIL

Dynamics 365

Insurance

Sales & Service

Email Messages

Add New Coverage

SANDBOX

Reply

Reply all

Forward

Save

Refresh

Process

Convert To

Delete

Email a Link

Assign

Add to Queue

Queue Item Details

Share

Flow

Word Templates

Read only This record's status: Completed

Add New Coverage

Email - Email

Normal

Priority

Due

Received

Status Reason

Owner

Nilam Kherade

Email

Related

From

Amit Gunjan

To

Support

Regarding

Cc

Bcc

Subject

Add New Coverage

Attachment

See all records

File Name

Followed

File Size (L)

image001.jpg

No

3,043

This content was not generated by Microsoft and may not be secure. The design seen by message recipients may differ slightly from this preview, depending on which email client and screen size they use. External links in the preview aren't managed by Microsoft and may be unsafe. [Open the full email \(some images may not display\).](#)

Hi,

Please add new Key coverage to my policy.

Regards,

Amit Gunjan

Mobile: +91 9703872345 | Amit.Gunjan@adyatantech.com

ADYATAN

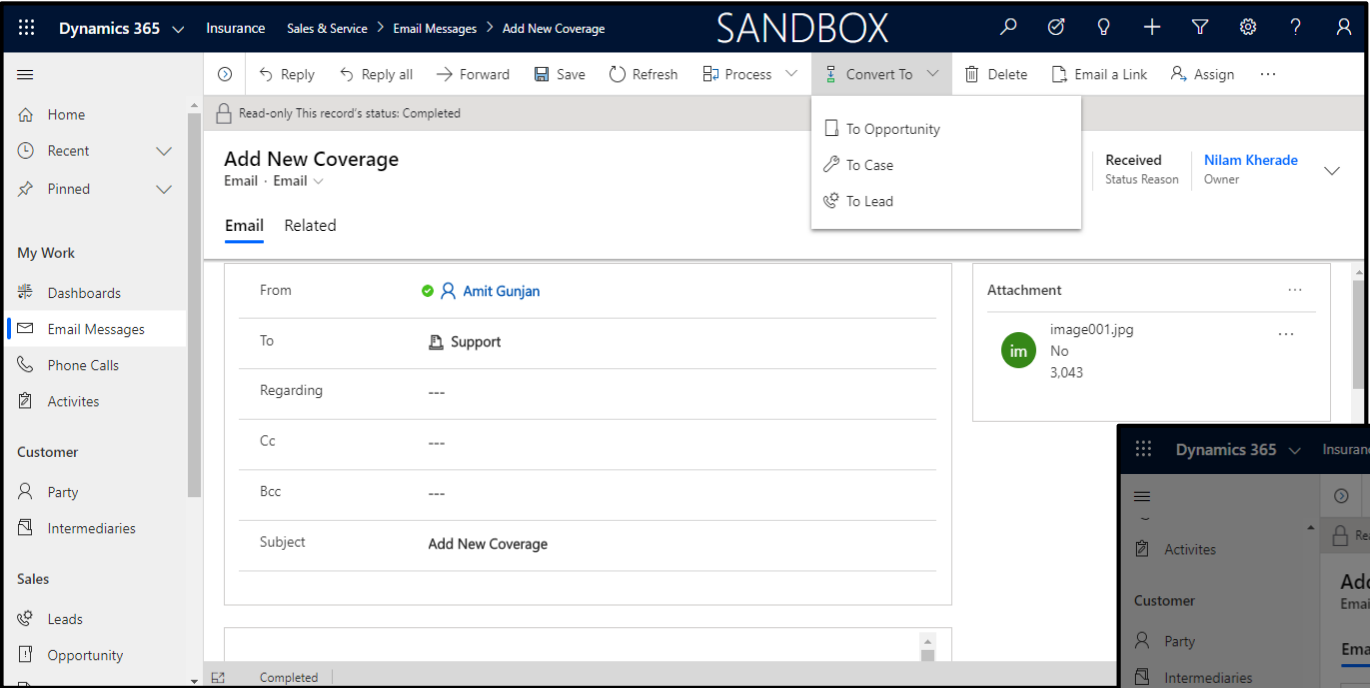
Microsoft Silver Partner

www.adyatantech.com

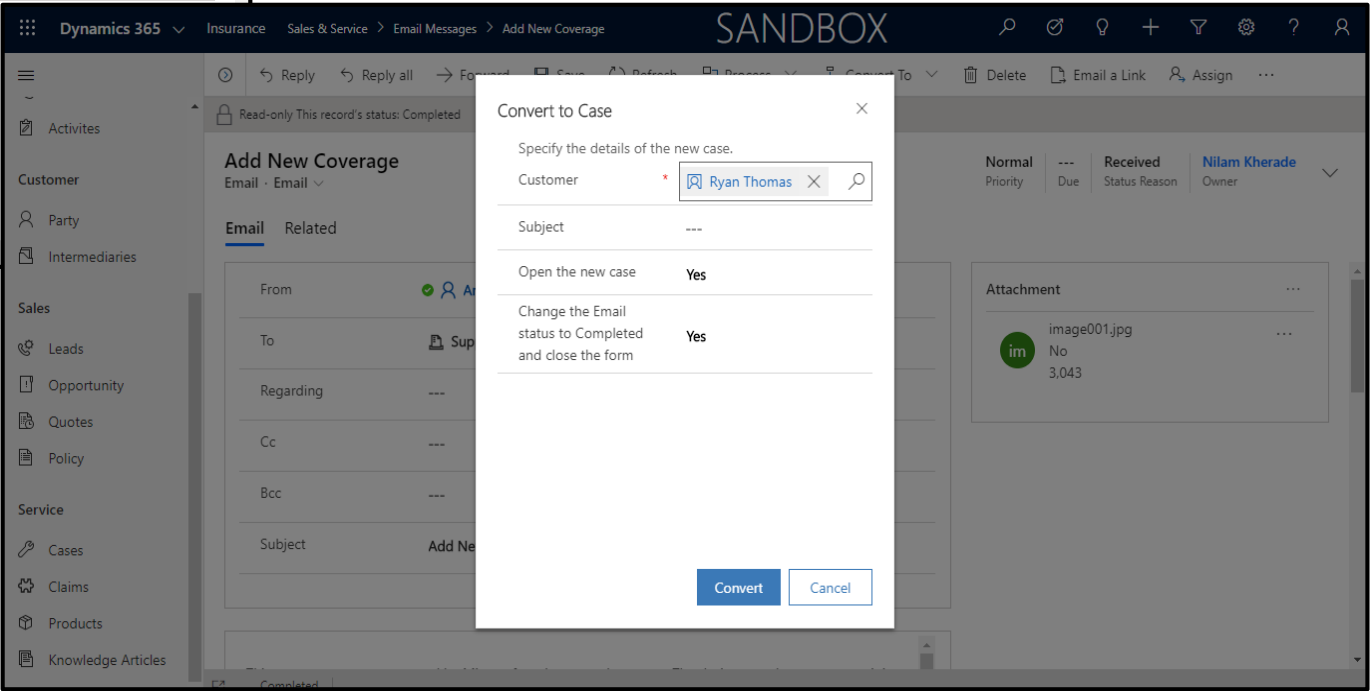
CUSTOMER SERVICE



CLICK ON THE CONVERT TO CASE TO CREATE A NEW CASE



ENTER DETAILS FOR THE CASE



CUSTOMER SERVICE



ENTER SR TYPE, SR SUBTYPE

Dynamics 365 Insurance Sales & Service > Cases > Add New Coverage

SANDBOX

Save & Route New Create Child Case Resolve Case Cancel Case Add to Queue Queue Item Details Assign

AN Add New Coverage
Case · Case

Normal Priority 20/4/2020 1:21 PM Created On In Progress Status Amit Gunjan Owner

Case Management
Active for less than one mi...

Identify (< 1 Min) Validate Resolve

Summary Timeline Case Relationships Enhanced SLA Details Additional Details Social Details

Summary

ID: CAS-01008-Q0T2W1

SR Type: **Endorsement**

SR Sub Type: **Add Coverage**

Customer: **Ryan Thomas**

Policy: **Looking for Car Insurance**

1 Results found

How To add Additional Coverage
1. Open Policy 2. Click on ReOpen Policy 3. Click on Add New Product From Product Section. 4. Select required Coverage 5. Click on Save 6. Act...

Link Email

0 Last modified 1/4/2020

Thomas

Company: **Sky Web Solutions**

Email: ryan.thomas

Mobile: 6787645678

Business: 6578987634

RECENT CASES

GO TO ADDITIONAL DETAILS AND SET FIRST RESPONSE SENT AS YES

Dynamics 365 Insurance Sales & Service > Cases > Add New Coverage

SANDBOX

Save & Route New Create Child Case Resolve Case Cancel Case Add to Queue Queue Item Details Assign

AN Add New Coverage
Case · Case

Normal Priority 20/4/2020 1:21 PM Created On In Progress Status Amit Gunjan Owner

Case Management
Active for less than one mi...

Identify (< 1 Min) Validate Resolve

Summary Timeline Case Relationships Enhanced SLA Details **Additional Details** Social Details

Type: ---

Parent Case: ---

Escalated: **No**

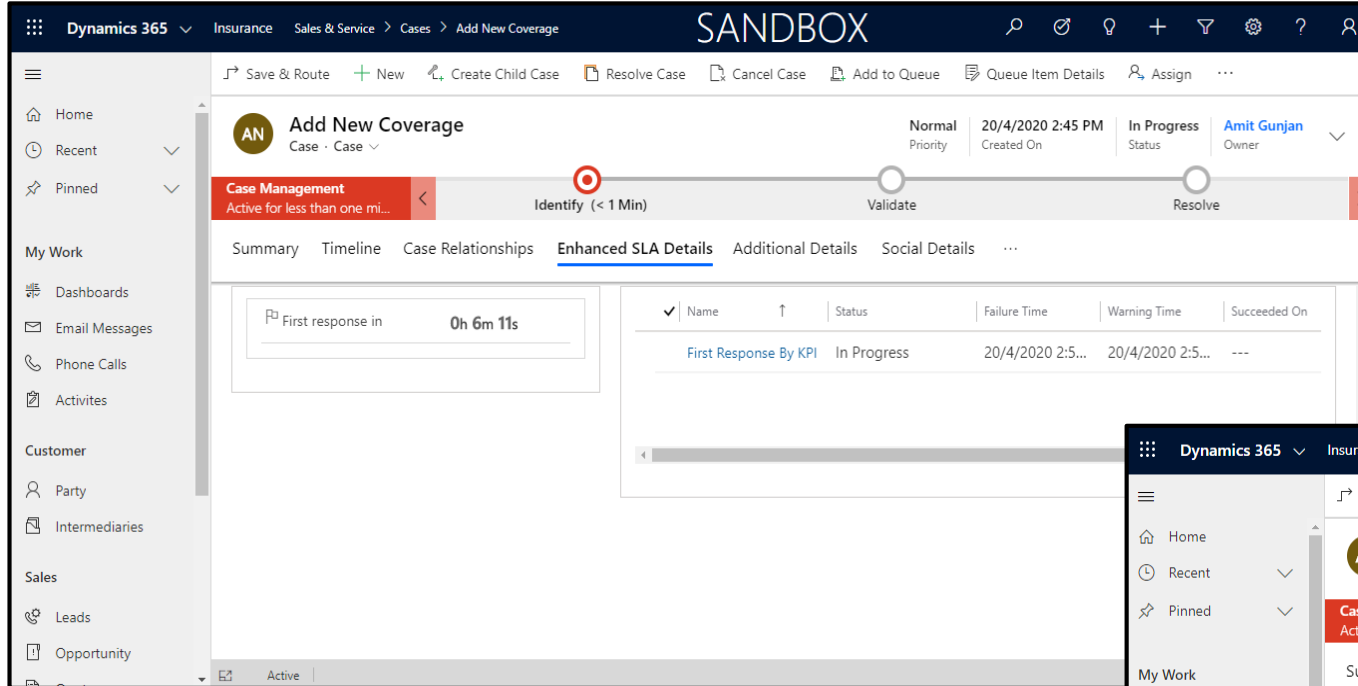
Escalated On: ---

Follow Up By: ---

First Response Sent: **Yes**

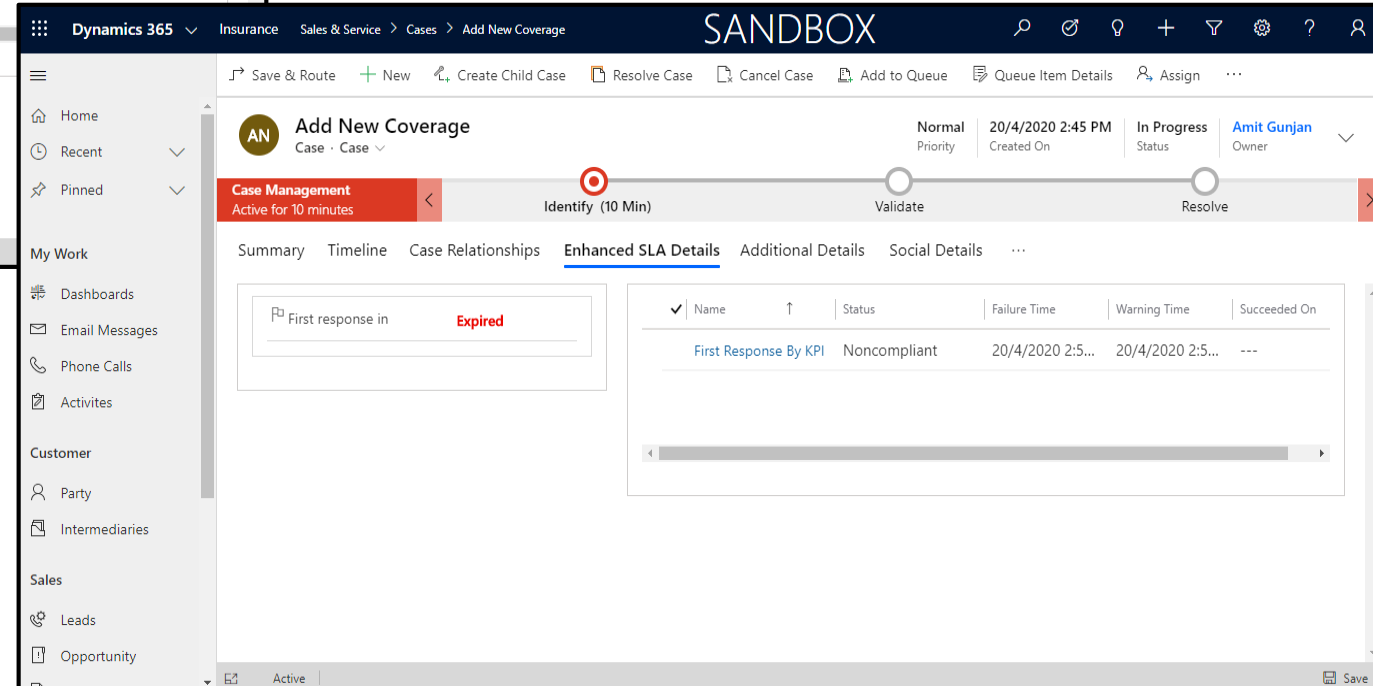
CUSTOMER SERVICE

GET ALL THE SLA DETAILS IN ENHANCED SLA DETAILS TAB



The screenshot shows the Dynamics 365 interface for a case titled "Add New Coverage". The "Enhanced SLA Details" tab is selected, showing a progress bar with stages: Identify (< 1 Min), Validate, and Resolve. The "First response in" timer is at 0h 6m 11s. The table below shows the SLA details:

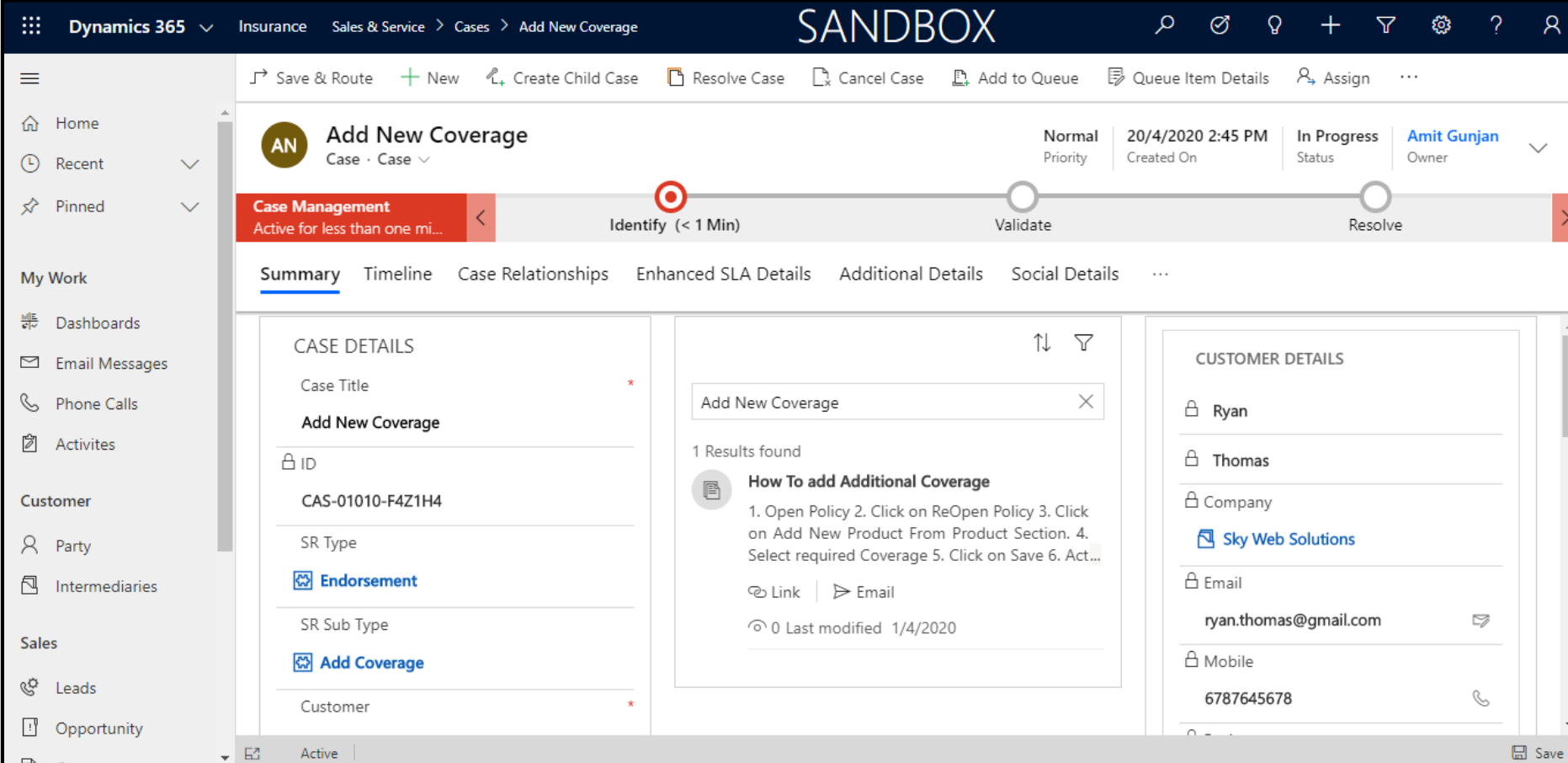
✓	Name	↑	Status	Failure Time	Warning Time	Succeeded On
	First Response By KPI		In Progress	20/4/2020 2:5...	20/4/2020 2:5...	---



The screenshot shows the Dynamics 365 interface for a case titled "Add New Coverage". The "Enhanced SLA Details" tab is selected, showing a progress bar with stages: Identify (10 Min), Validate, and Resolve. The "First response in" timer is at Expired. The table below shows the SLA details:

✓	Name	↑	Status	Failure Time	Warning Time	Succeeded On
	First Response By KPI		Noncompliant	20/4/2020 2:5...	20/4/2020 2:5...	---

KB ARTICLE IS INTEGRATED WITH CASE



The screenshot displays the Dynamics 365 Insurance 'Add New Coverage' case page. The interface includes a left-hand navigation pane with sections like 'My Work', 'Customer', and 'Sales'. The main area features a top navigation bar with the title 'Add New Coverage' and a status bar showing 'Normal Priority', '20/4/2020 2:45 PM Created On', 'In Progress Status', and 'Amit Gunjan Owner'. A timeline at the top shows stages: 'Identify (< 1 Min)', 'Validate', and 'Resolve'. Below the timeline, the 'Summary' tab is active, displaying 'CASE DETAILS' and 'CUSTOMER DETAILS'. The 'CASE DETAILS' section includes fields for Case Title, ID, SR Type, SR Sub Type, and Customer. The 'CUSTOMER DETAILS' section includes fields for Name, Company, Email, and Mobile. A knowledge base article titled 'How To add Additional Coverage' is displayed in the center, providing steps for adding coverage and a link to the article.

Dynamics 365 Insurance Sales & Service > Cases > Add New Coverage

SANDBOX

Save & Route New Create Child Case Resolve Case Cancel Case Add to Queue Queue Item Details Assign

AN Add New Coverage Case · Case

Normal Priority 20/4/2020 2:45 PM Created On In Progress Status Amit Gunjan Owner

Case Management Active for less than one mi...

Identify (< 1 Min) Validate Resolve

Summary Timeline Case Relationships Enhanced SLA Details Additional Details Social Details

CASE DETAILS

Case Title Add New Coverage

ID CAS-01010-F4Z1H4

SR Type Endorsement

SR Sub Type Add Coverage

Customer

CUSTOMER DETAILS

Ryan

Thomas

Company Sky Web Solutions

Email ryan.thomas@gmail.com

Mobile 6787645678

How To add Additional Coverage

1 Results found

1. Open Policy 2. Click on ReOpen Policy 3. Click on Add New Product From Product Section. 4. Select required Coverage 5. Click on Save 6. Act...

Link Email

0 Last modified 1/4/2020

Active Save

THANK YOU