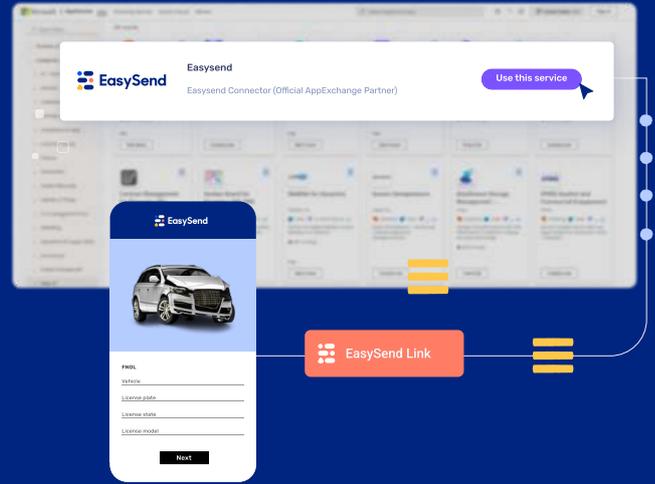EasySend   Microsoft Dynamics 365

Streamline customer data intake and automate your workflow, all from one trustworthy platform

Transform complex forms into easy digital experiences with EasySend and connect your Dynamics 365 account to pre-populate fields, collect eSignatures, launch journeys, and optimize results securely all from your Microsoft Ecosystem.

Trusted by: SOMPO HOLDINGS   CINCINNATI INSURANCE COMPANIES   RLI DIFFERENT WORKS   R+V   Real Garant by ZURICH   PSCU   Petplan

The power of Dynamics 365 with Easysend

Maintain one source of truth

Omnichannel solution for better UX

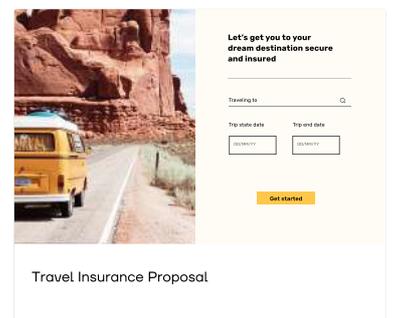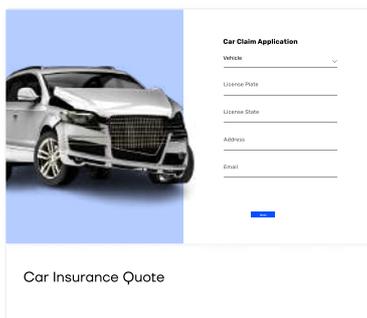**Launch journeys from Dynamics 365**
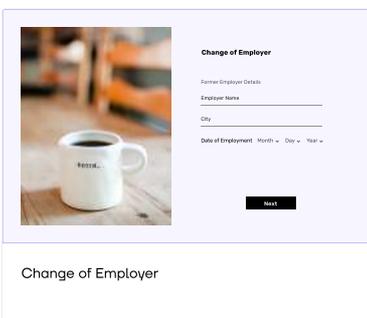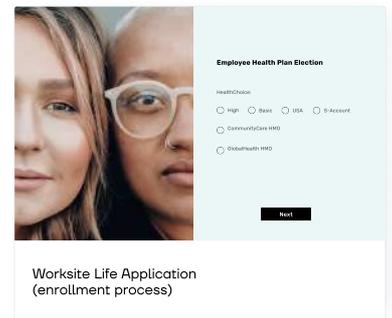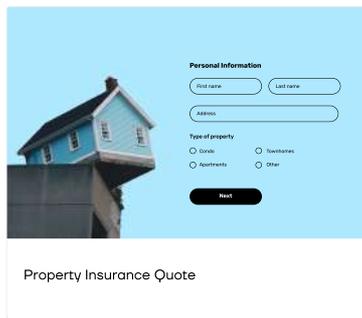
Keep all your data in the Dataverse

Better experiences for everyone

Build and manage any digital process in days with no code.
Start from scratch or with a PDF and digitize any use case such as insurance quotes, applications, onboarding, or claims.
Customize every process to look great on any device.
Connect your digital data intake process to your Microsoft Ecosystem for a secure and seamless experience.

Pet Insurance Claim

Property Insurance Quote

Worksite Life Application (enrollment process)

Change of Employer

Car Insurance Quote

Travel Insurance Proposal
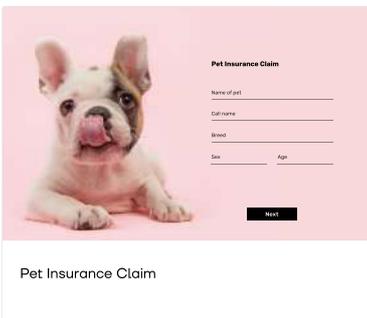
EasySend & Microsoft Dynamics 365: a powerhouse solution for all your digital needs

Build | Manage | Optimize

Easy-to-use interfaces

Activate easy-to-use interfaces and initiate link sending directly from your Microsoft environment.

Assist with co-browsing

Assist customers remotely to help them finish their digital journeys in real-time with EasySend's co-browsing software.

Create and manage records

Create new records or update existing ones in Dynamics 365 with information collected in the EasySend digital journey.

Compatible with any object

Full out-of-the-box support with any standard or custom objects within Dynamics 365.

Two-way integration

Securely push and pull data from the Dataverse to create uber-personalized experiences.

Prefill EasySend digital journeys

Prefill EasySend digital journeys with existing information from any Dynamics 365 record.

Increase customer usage

Make it easy for customers to start, sign and complete digital processes from any device.

View ongoing session status

View the ongoing status of your journey directly on the Dynamics 365 record and see metrics such as last opened and time of submission.

Utilize data to the fullest extent

Create customized reports, charts, and dashboards using data points collected on the EasySend session.

Transform any customer data and signature intake process into an interactive, digital experience

For your IT team
Build digital customer journeys in the cloud right from Dynamics 365 using native fields and objects.

For your agents
Manage all your journeys in one place. When it comes time to launch, click send from the Dynamics CRM.

For your management
Track customer progress, see how journeys are performing, and optimize every step based on real data.

For your customers
Make it easy for customers to fill out the right answers with pre-populated fields and a two-way database that auto-syncs.

Security is our top priority

You can trust your data is in good hands. EasySend is compliant with the highest international security and privacy standard including:

Your digital partner

Bring your enterprise up to speed and deliver a full omnichannel solution that will boost your customer engagement and retention.