

Benefit Inquiry Agent

Quickly access member and plan details without switching screens.

Our solution connects Dynamics 365 Customer Service with policy administration platforms like Facets to deliver fast, accurate benefit information.

Current Challenges

- Customer service reps waste time navigating multiple systems.
- Large datasets slow down queries.
- Missing or incomplete data causes errors.

Key Capabilities

- **One-Click Launch** – Start directly from Dynamics 365 Customer Service.
- **Instant Data Retrieval** – Pull member and plan details from Dynamics 365 and external systems.
- **Smart Indexing** – Speeds up queries for large datasets.
- **Reliable Backup** – Ensures data availability with fallback options.

Business Impact

- Faster responses, less navigation.
- Fewer errors with automatic context.
- Scalable performance for big data.
- Always-on access to critical information.

Primary Users

- Customer Service Representatives
- Member Services Agents
- Supervisors & Team Leads
- Support Analysts
- Members