



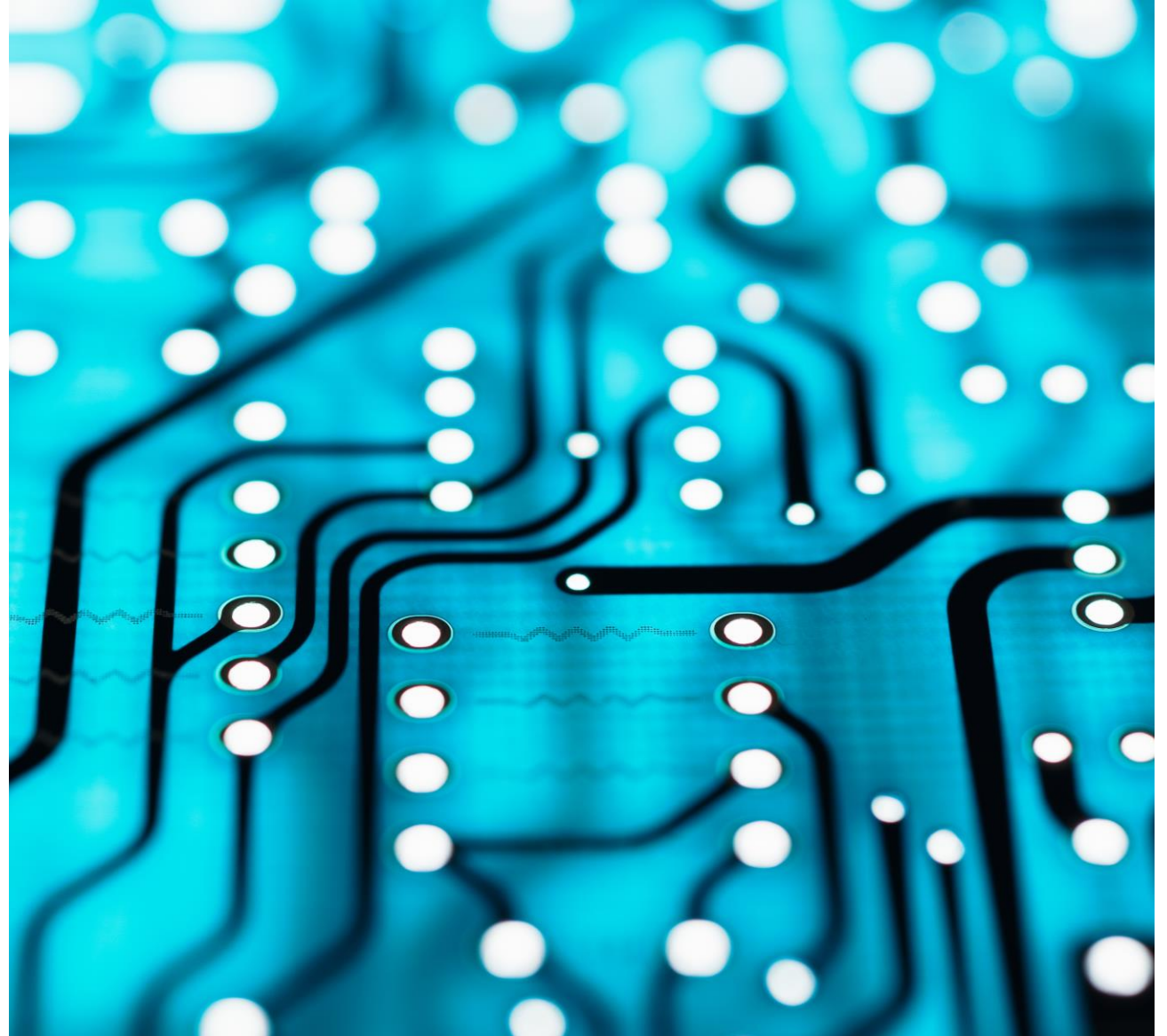
CUSTOMER TRANSACTION MANAGEMENT

AUTOMATION & ANALYTICS

PREPARED BY: SHONTINA WESLEY

AGENDA

- What is this system?
- Who will use this system?
- Live Program Demo
- The final product



WHAT? CUSTOMER TRANSACTION MANAGEMENT



- This system implementation utilizes digital process automation(DPA) to connect apps, data, and services with cloud flows.
- Power Automate captures customer data from emails and using RPA(robotics process automation) grabs customer data from carrier sites. File is created from these data sources and uploaded to the Azure data lake house Gen 2.
- Python coding is used to combine data from these disparate sources. The data is transformed from unstructured to structured data within the Azure Synapse workspace. The workspace is where the SQL database and views come to life.
- Power BI is connected to the database via a SQL serverless endpoint. Power BI is then used for data visualization and as a reporting tool.

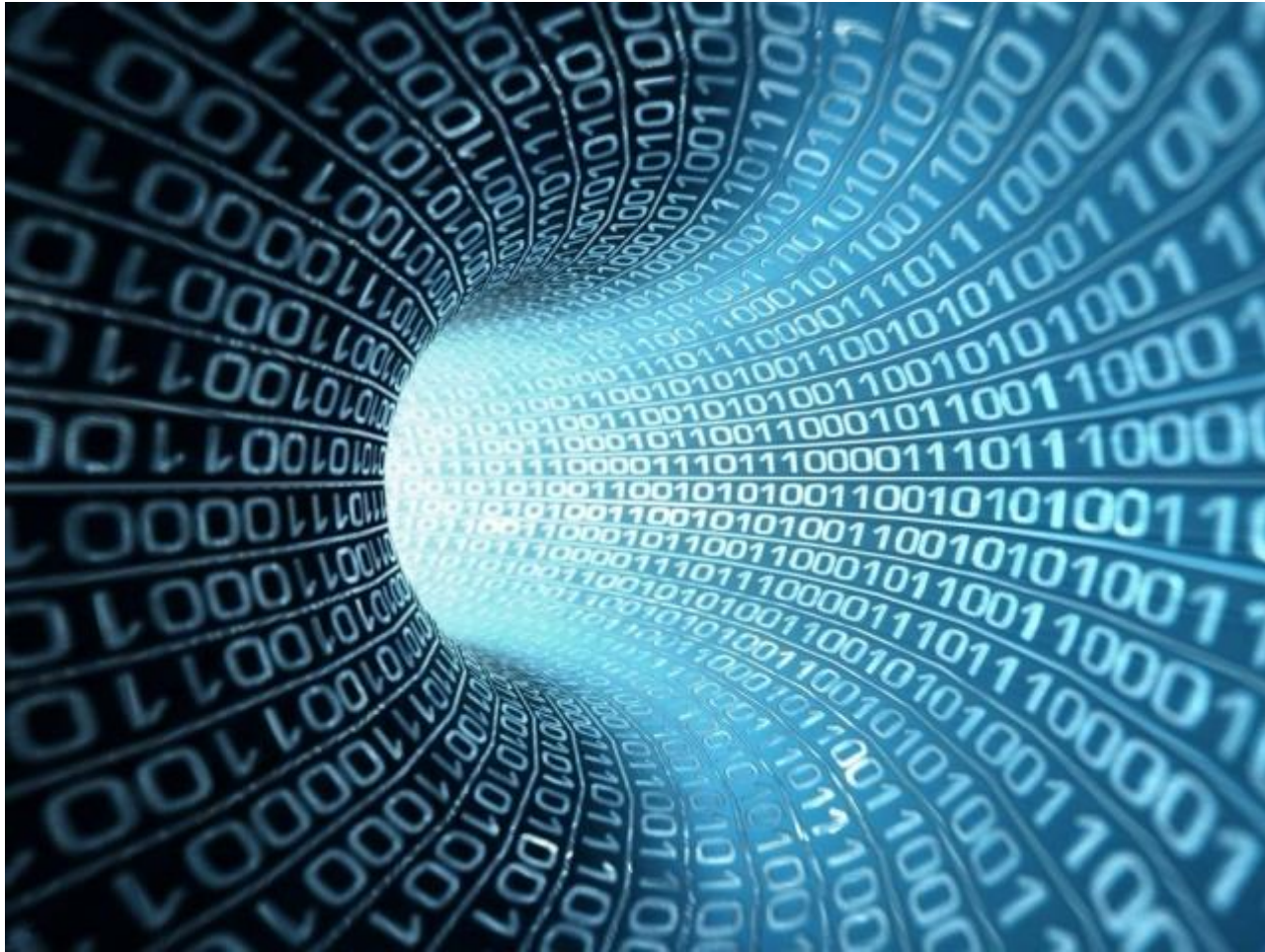
WHO? CLIENT: SKYINDEMNITY INSURANCE BROKERAGE

- This system is for Sky Indemnity insurance brokerage. Sky Indemnity has multiple carriers that send information on customer updates for insurance policies.
- Sky Indemnity only has 3 employees and needs to reduce manual effort in retrieving data from disparate resources and creating spreadsheets to capture and query data sets.
- Sky Indemnity wants to retain customers and grow the business. To do this the company needs an up-to-date single data repository along with a robust reporting and analytical tool.



PROGRAM DEMO

- Kaltura Capture recording - October 31st 2022, 11:01:03 pm - Indiana University



THE FINAL PRODUCT

(WAIT THERE'S MORE!!)

The final demo will include:

- ☐ Build Gold zone
- ☐ Build pipeline to orchestra data flow
- ☐ Demonstration of additional use cases-
 - ☐ RPA desktop flow
 - ☐ Using Power BI Interface for data exploration.
 - ☐ Ad hoc reporting
 - ☐ Data visualizations