PragmaAssurance

Version 1.0.0

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1. INTRODUCTION

1.1 PURPOSE

This user manual is designed to demonstrate how business users can configure the masters for various stages and how service processes flows.

- This solution provides a consistent and differentiated experience to customers there by improves customer satisfaction.
- Real time changes to the process flows which enables organizations to focus on continuously optimizing the business process without worrying about the development time required for IT teams and reduces dependency on IT teams.

1.2 PRAGMASSURANCE

What is Pragmassurance?

Pragmassurance is a MS Dynamics CRM online based product offered by Pragmasys which is the ideal CRM solution for the various companies. It's a Microsoft Dynamics CRM solutions for insurance industry designed in a powerful way. Pragmassurance offers its users with a broad spectrum of benefits including the financial services, health services, individual life services and group benefits.

Pragmassurance offers a configurable Customer Service Workflow Automation Solution which transfers the control of setting up the support process flows from developers to users. It provides comprehensive insurance case management capabilities including ability to define multiple flows based on different criteria, multi-step sequential processes with defined SLAs.

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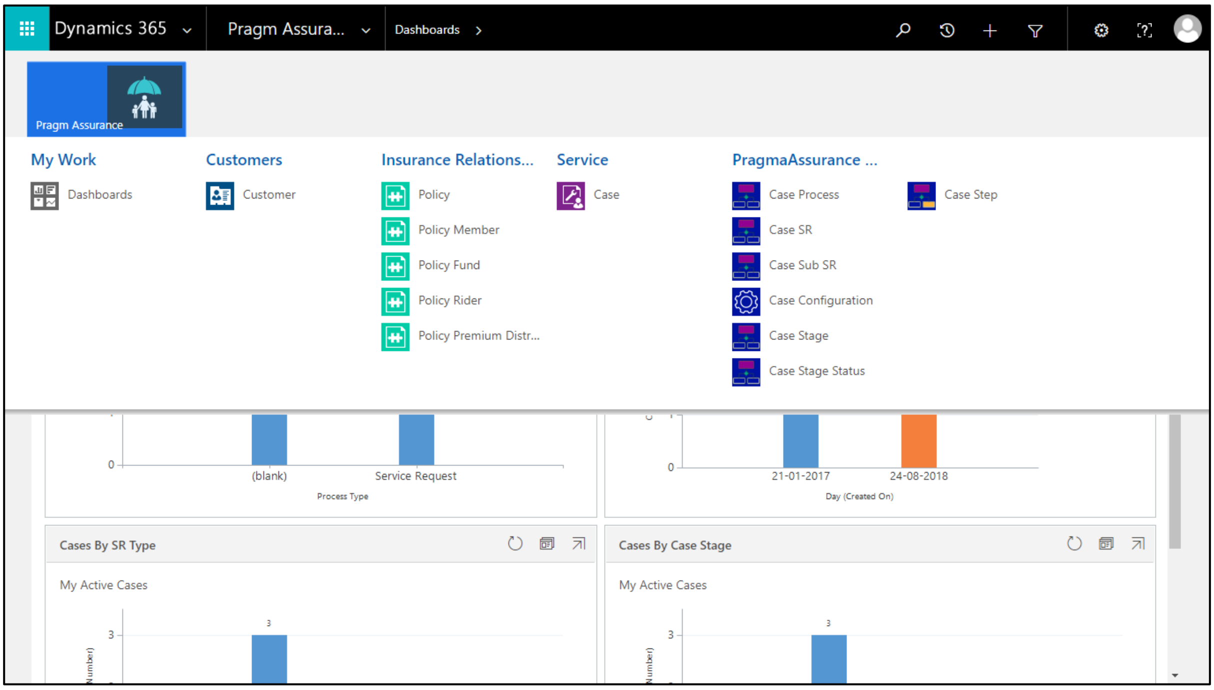
2. Configure Master Data

Configure master data consist of following steps:

2. 1 New Service Type (Case Process, Case SR, Case Sub SR)

For configuration of new service request, add master data for **Case Process, Case SR and Case Sub SR**. To add master data in these 3 entities, follow below step.

1. To view Case Process, Case SR and Case Sub SR entities, go **Pragma Assurance** inside **App Area** and then go **PragmaAssurance Management** inside **Setting** Area.



2. Click on Case Process, then Click on New (+) on top left corner, below screen will open. Enter Process name. e.g. Servicing - Alteration. In the bottom-right corner of the page, click  to Save Process Name.

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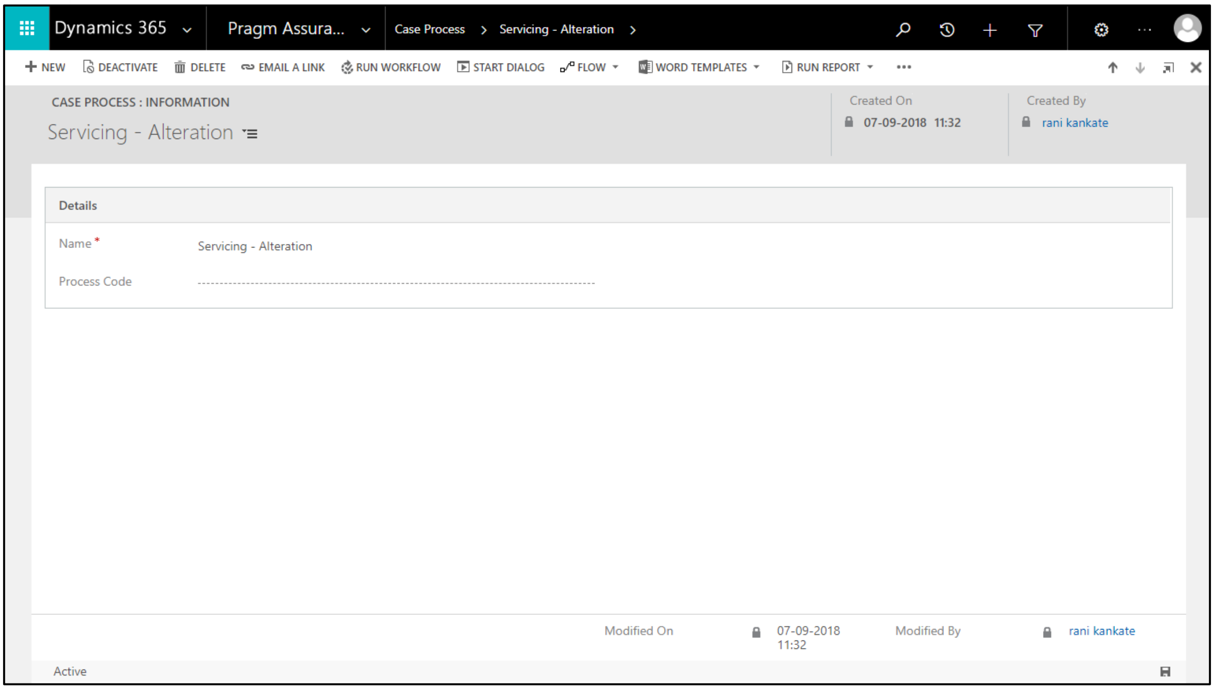
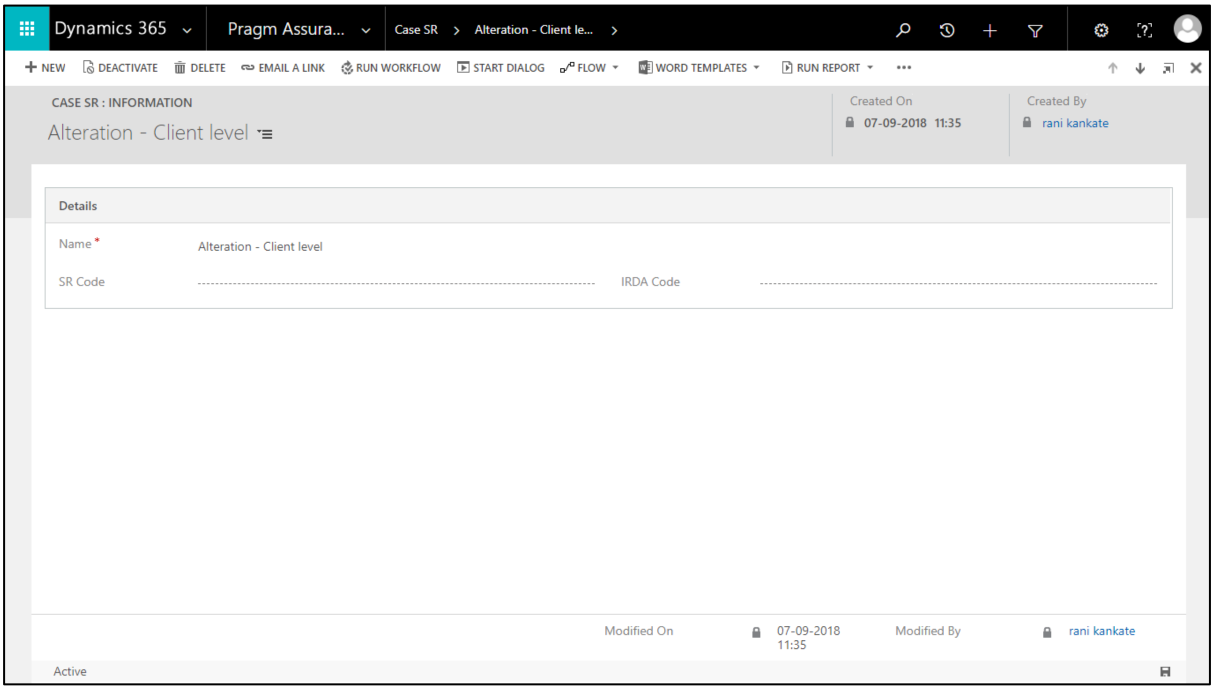


3. Click on Case SR, then Click on New (+) on top left corner, below screen will open. Enter SR (Service Request) name. e.g. Alteration - Client level. In the bottom-right corner of the page, click to save SR Name.



4. Click on Case Sub SR, then Click on New (+) on top left corner, below screen will open. Enter Sub SR (Service Request) name. e.g. Change of Contact Details. In the bottom-right corner of the page, click to save Sub SR name.

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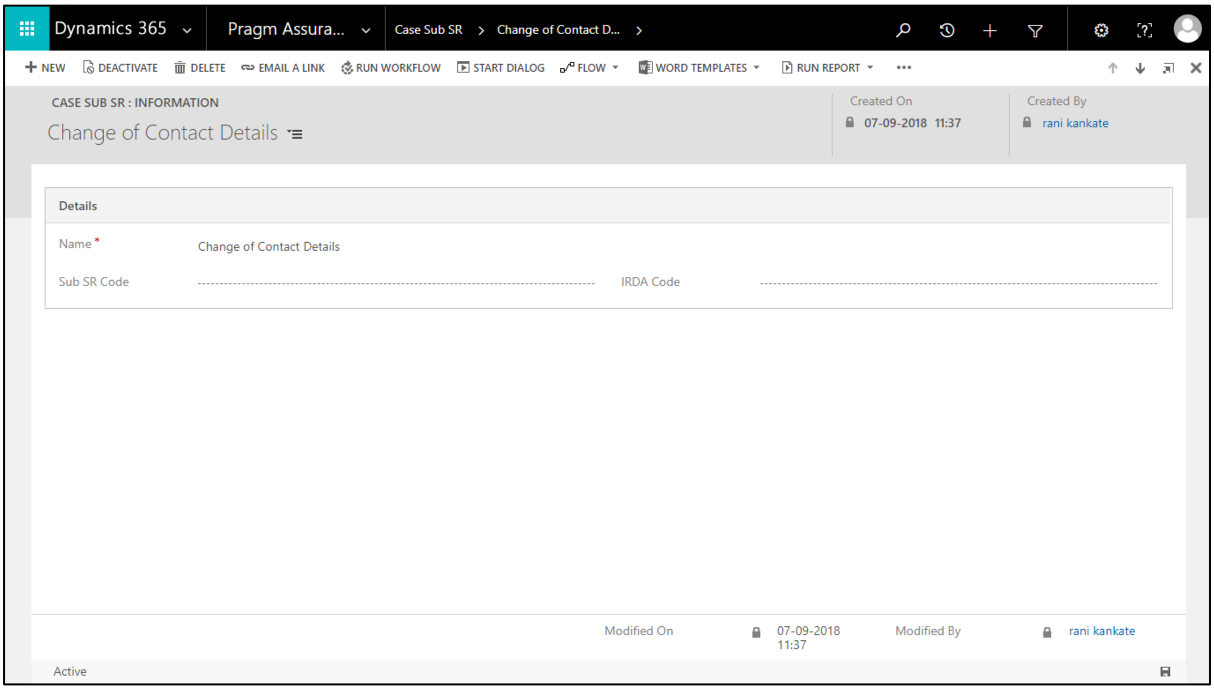
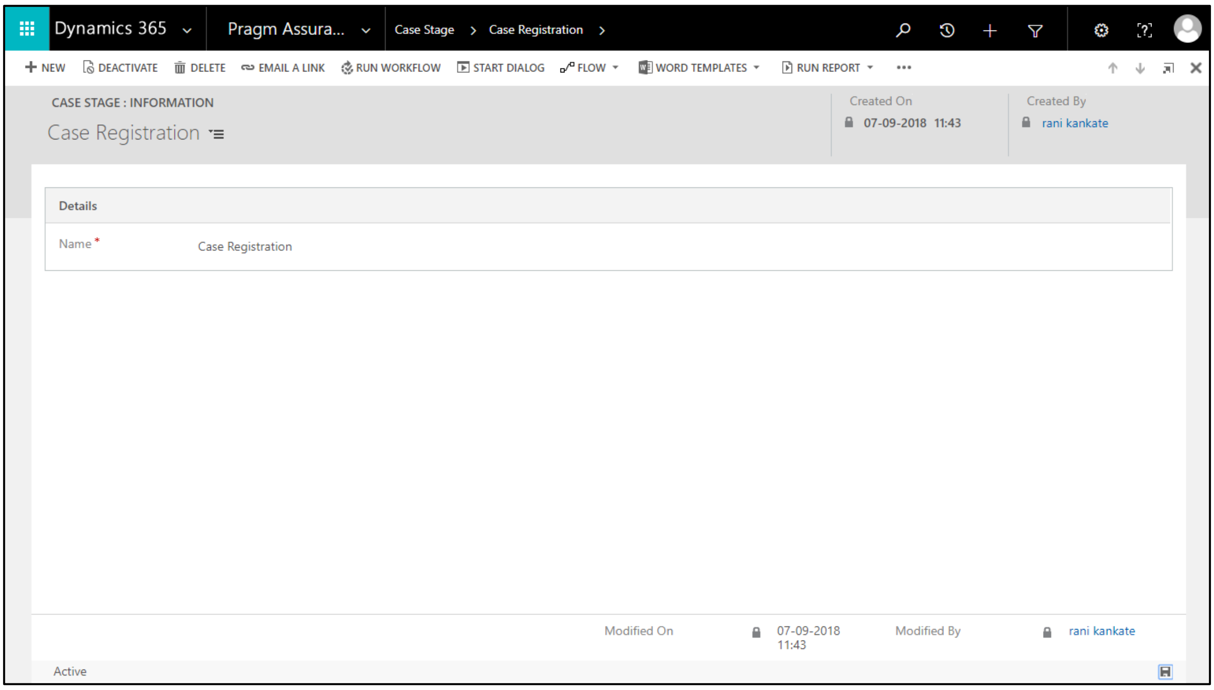


Dynamics 365
Pragm Assura...
Case Sub SR
Change of Contact D...
NEW
DEACTIVATE
DELETE
EMAIL A LINK
RUN WORKFLOW
START DIALOG
FLOW
WORD TEMPLATES
RUN REPORT
CASE SUB SR : INFORMATION
Change of Contact Details
Created On
07-09-2018 11:37
Created By
rani kankate
Details
Name *
Change of Contact Details
Sub SR Code
IRDA Code
Modified On
07-09-2018 11:37
Modified By
rani kankate
Active

2. 2 Create Stage and Stage Status

To routes the insurance service request based on defined process, add process stages and stage status.

1. Click on Case Stage, then Click on New (+) on top left corner, below screen will open. Enter Stage name. e.g. Case Registration. In the bottom-right corner of the page, click to Save Stage Name.



2. Click on Case Stage Status, then Click on New (+) on top left corner, below screen will open. Enter Stage Status name. e.g. Pending. In the bottom-right corner of the page, click to Save Stage Name.

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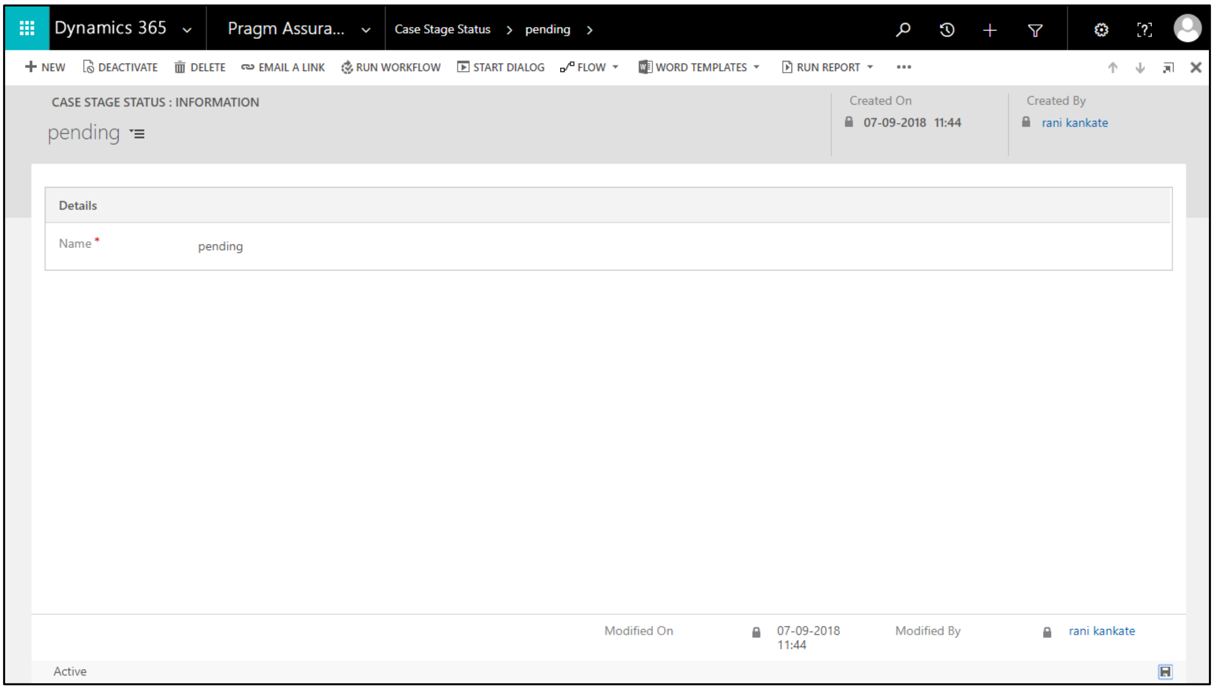

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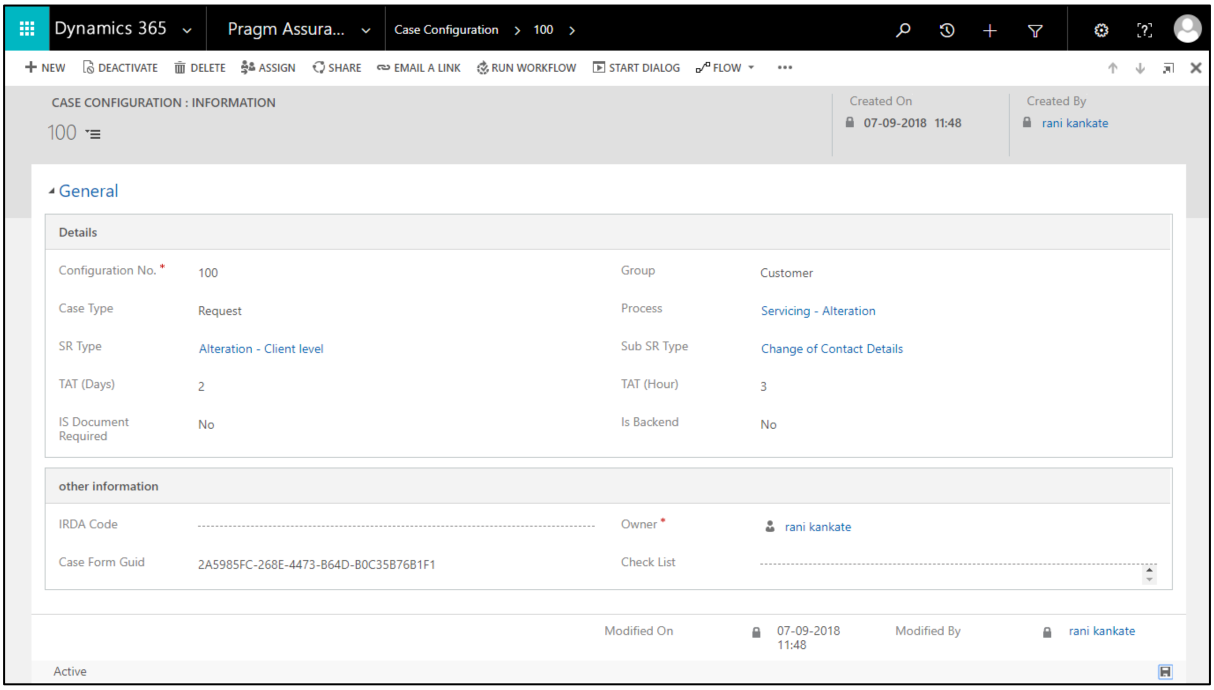
2. 3 Case Configuration for New Service Type

Case Configuration is a combination of Case Process, Case SR and Sub SR.

1. To add Case configuration, Click on Case configuration, then Click on New (+) on top left corner, below screen will open. Enter the detail explained below. In the bottom-right corner of the page, click  to Save Case configuration.



2. Enter case configuration no. which is running sequence no.
3. Select Service Requests Group. i.e. Customer or Advisor
4. Select Service Request type i.e. Request, Complaint etc.
5. Select Process, SR Type, Sub SR Type.
6. Enter the Turnaround time /SLA required to resolve this service request in days and hour.

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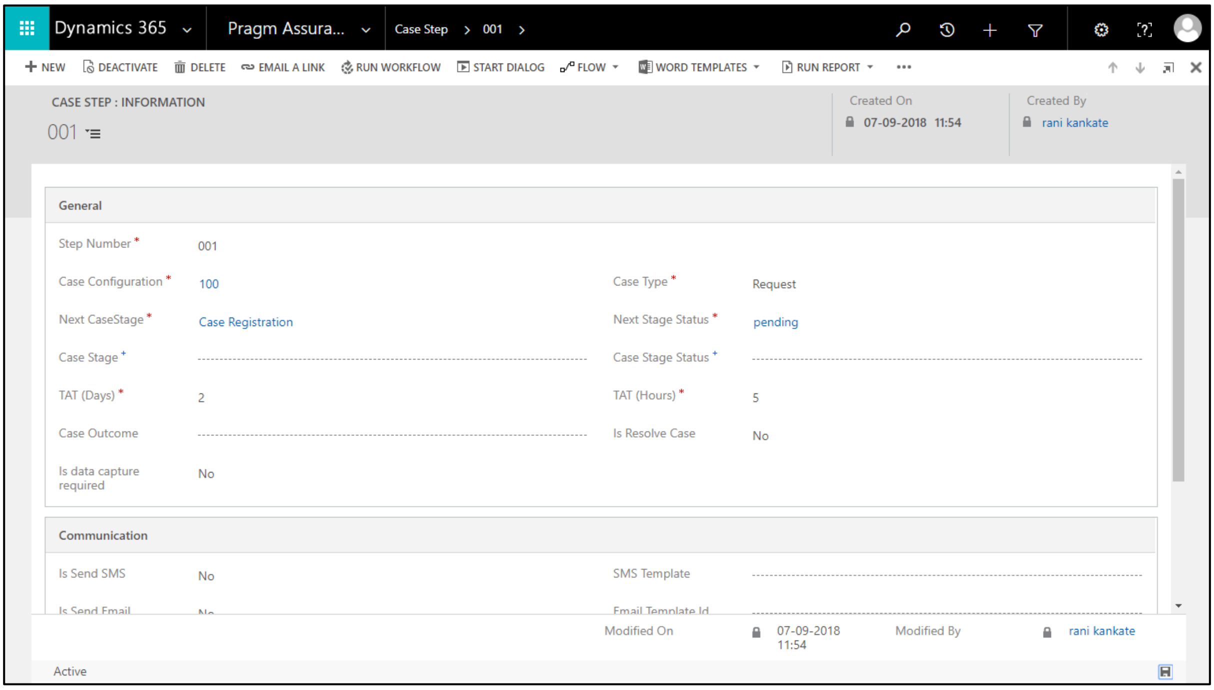
2. 4 Case Steps for New Service Type (assignment, TAT, next step, etc.)

Case step is nothing, but steps required to resolve insurance case. Steps can be differing case to case, business to business.

As per **service request** flow configure all required case step as below.

1. To add Case Step, Click on Case Step, then Click on New (+) on top left corner, below screen will open. Enter the detail explained below. In the bottom-right corner of the page, click to Save Case Step.
2. Case Stage & Case Stage Status field should be blank in the first very step of every new service type.



3. In second step select Case Stage & Case Stage Status of new service type.

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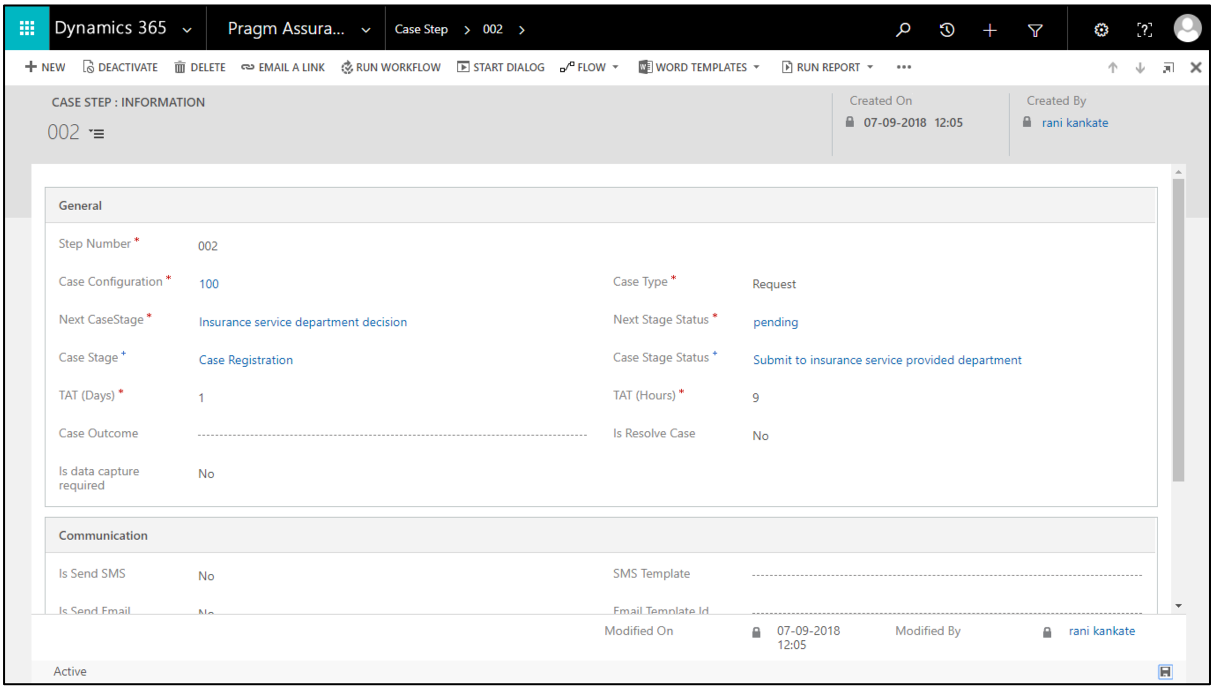

4. In **New Case Step**, enter the applicable details for the step. * denotes mandatory.
5. Step Number is running sequence number.
6. Select Case stage and Case Stage Status.
7. Based selected case stage enter next stage to be moved in current case stage field.
8. Enter standard TAT/SLA required to complete stage.
9. Enter SMS/ email template which will be triggered on stage change.
10. Enter User or team to which case will be assigned for further evaluation.

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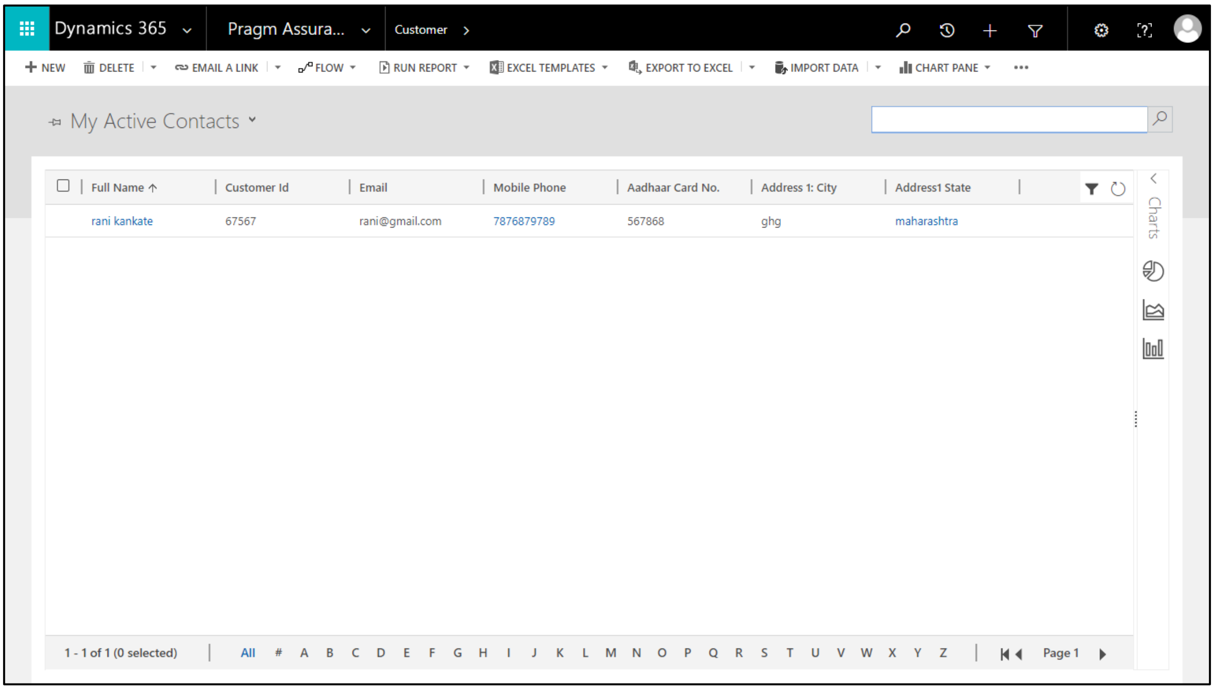
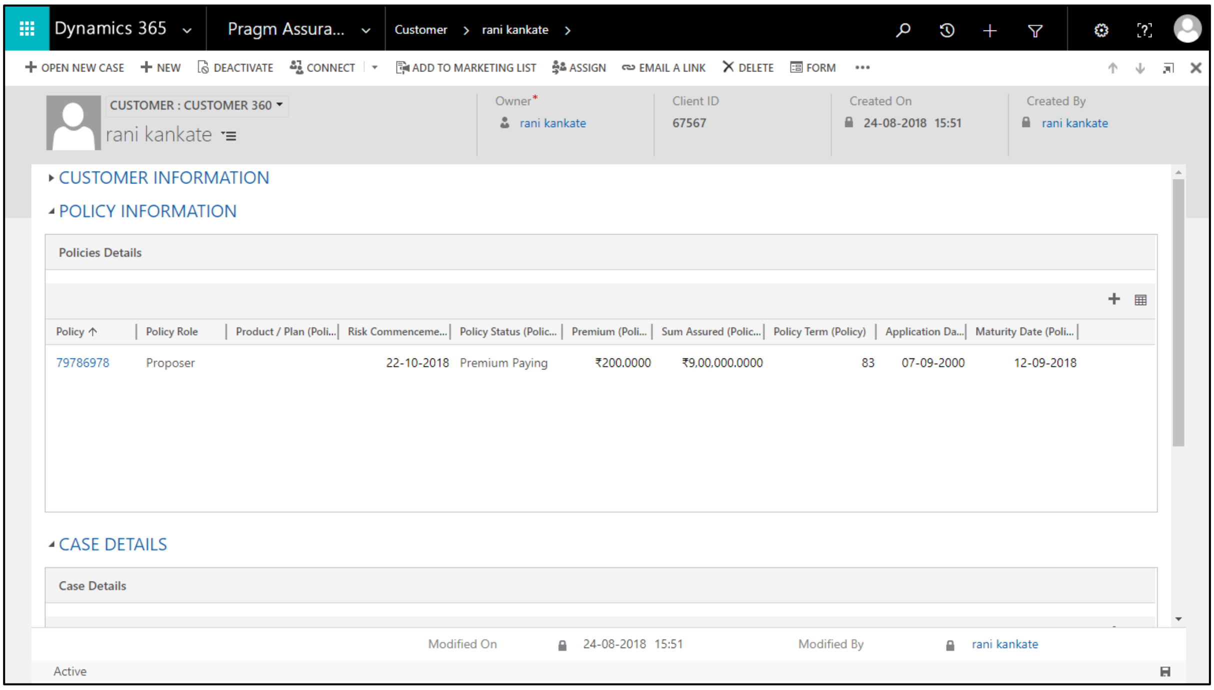
3. Create a Service Request

1. To Create New Case, go to **Service** -> **Contacts**-> **click on customer name to Open that contact.**



2. After open contact scroll to "**Policy Information**" section. Select **policy** from grid and click on "**OPEN NEW CASE**" button.



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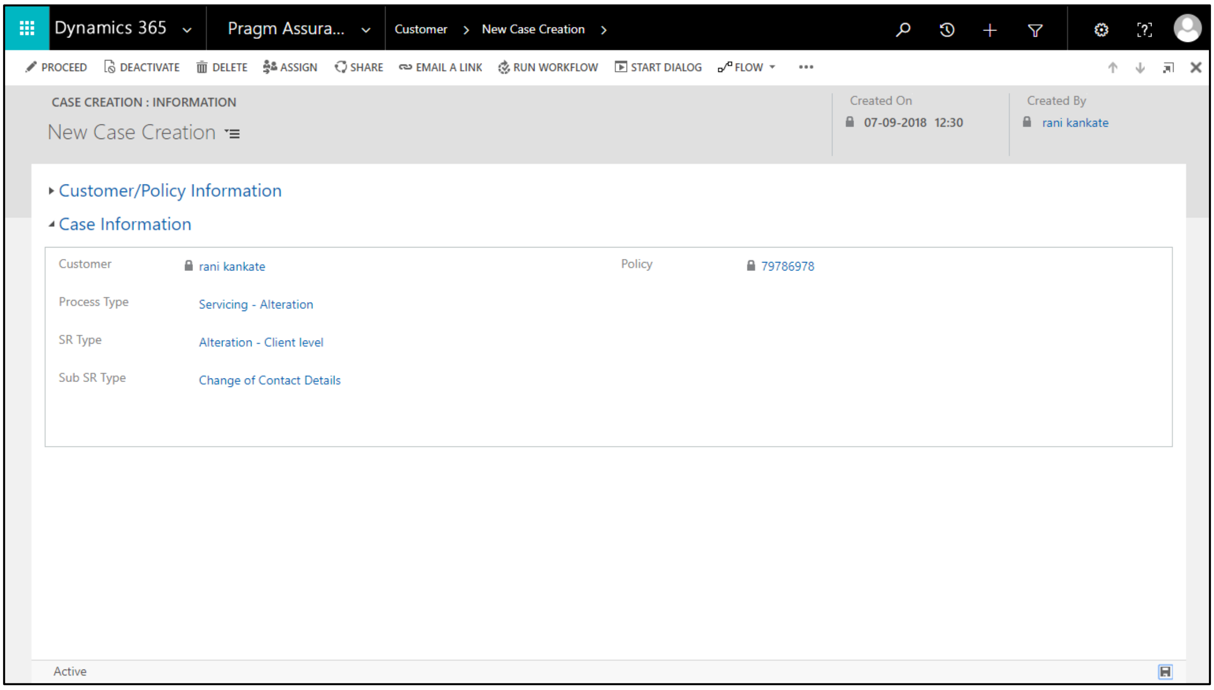
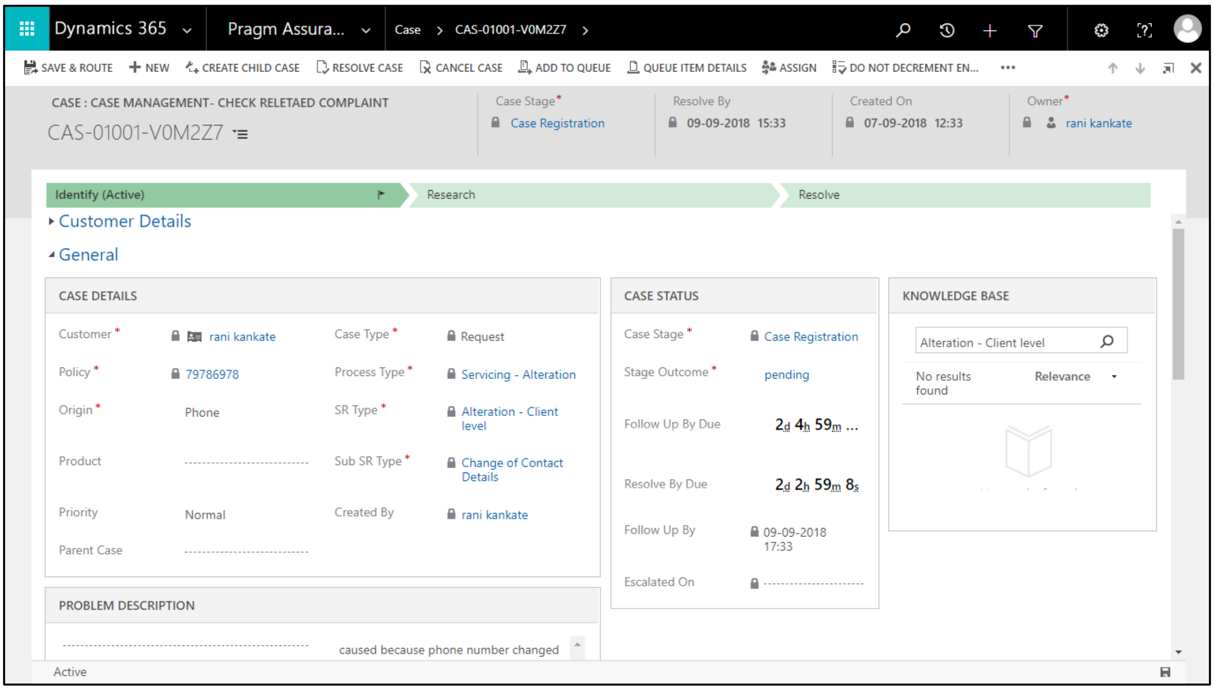
3. In **New Case**, enter the applicable details for the **SR**.* denotes mandatory.



4. Enter mandatory fields like Case Type, Process Type, SR Type, Sub SR Type, Problem Description and Click on **Save** and then click on **proceed** button.
5. As soon as case gets proceed TAT/SLA for Stage and TAT/SLA for SR will be calculated automatically as per defined in configuration and in case status section you able to see count down.



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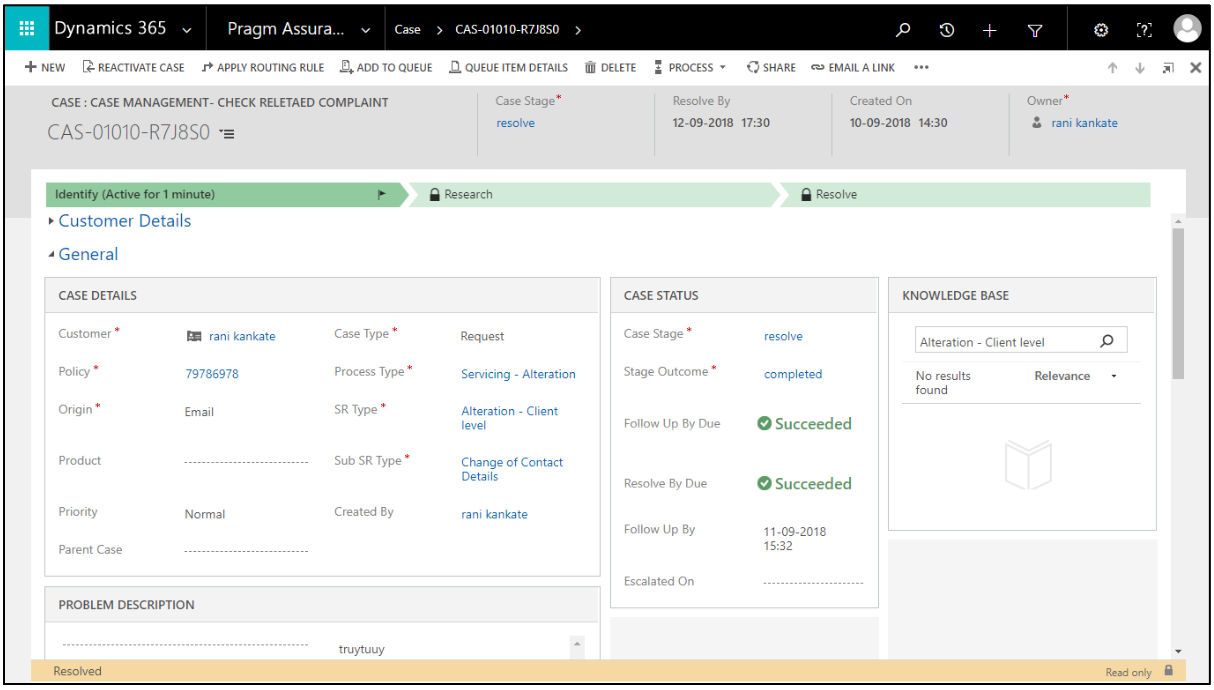
6. Also, case form will show all available (configured) knowledge base available for service request.
7. After entering all required detail click on **stage outcome** and select **Submit to insurance service provided department** and Click on **save** to move for next process flow.
8. Service request flow end when case become read only and **follow up by due** and **resolve by due** contain success or failure message.



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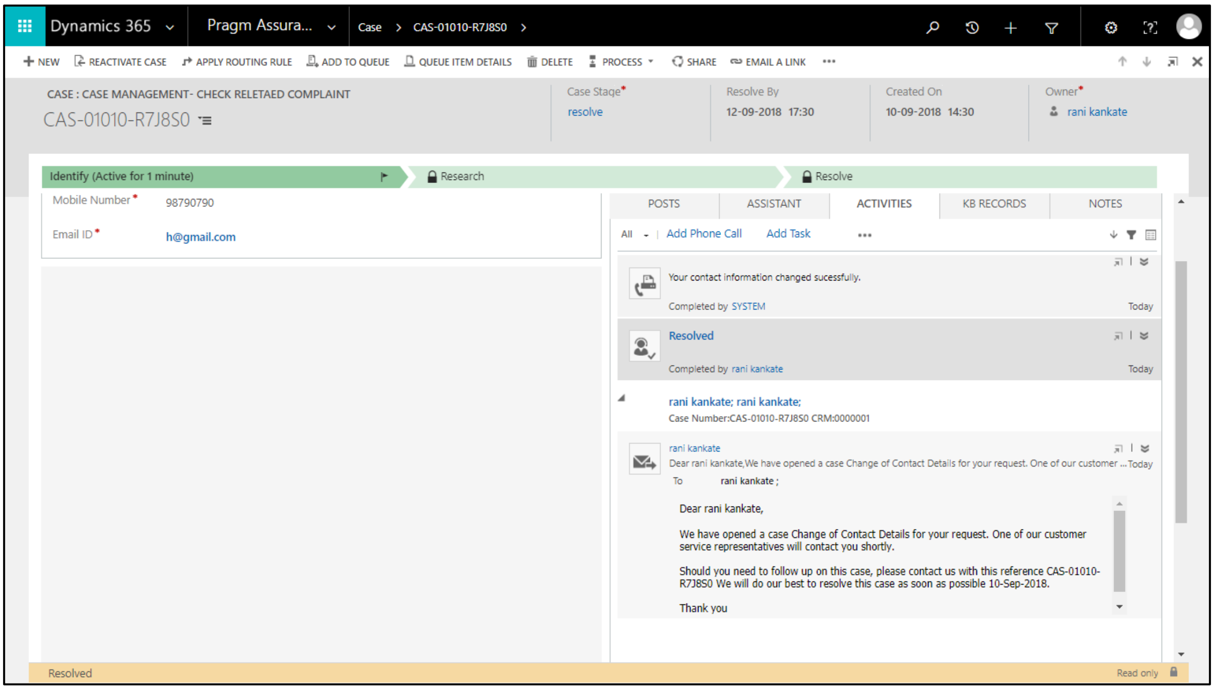
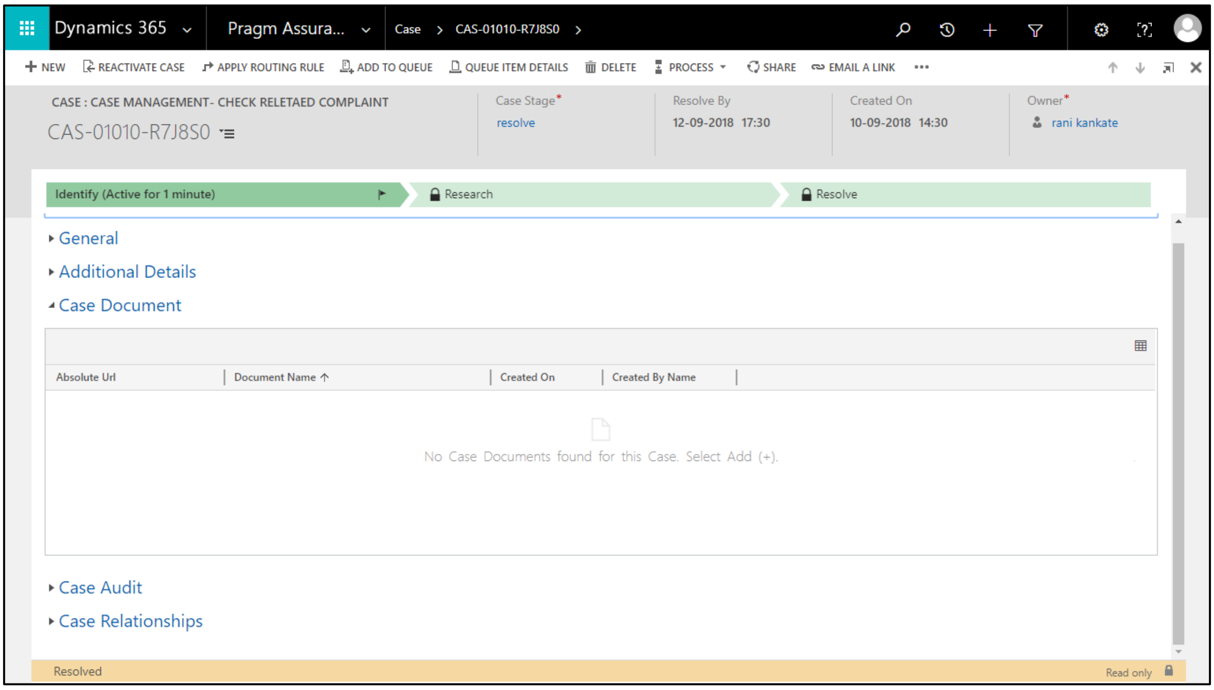
9. To view communication sent to customer click on tab **Additional detail**.



10. To view attached document, click on tab **Case Document**.



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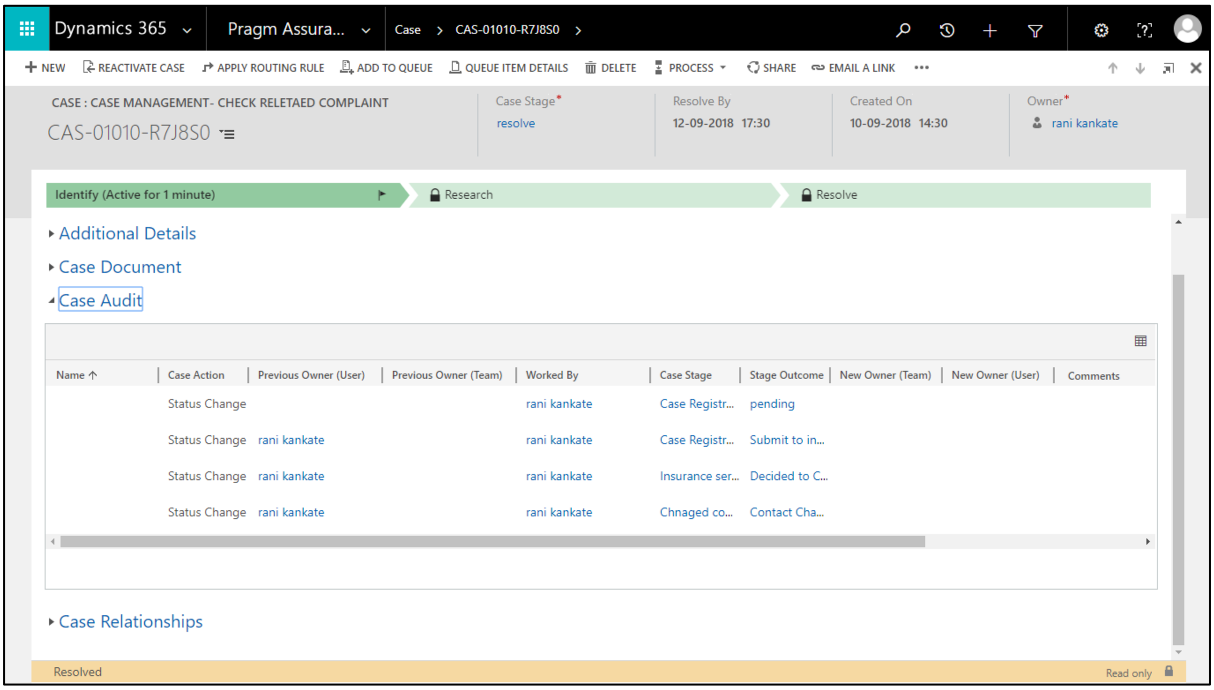
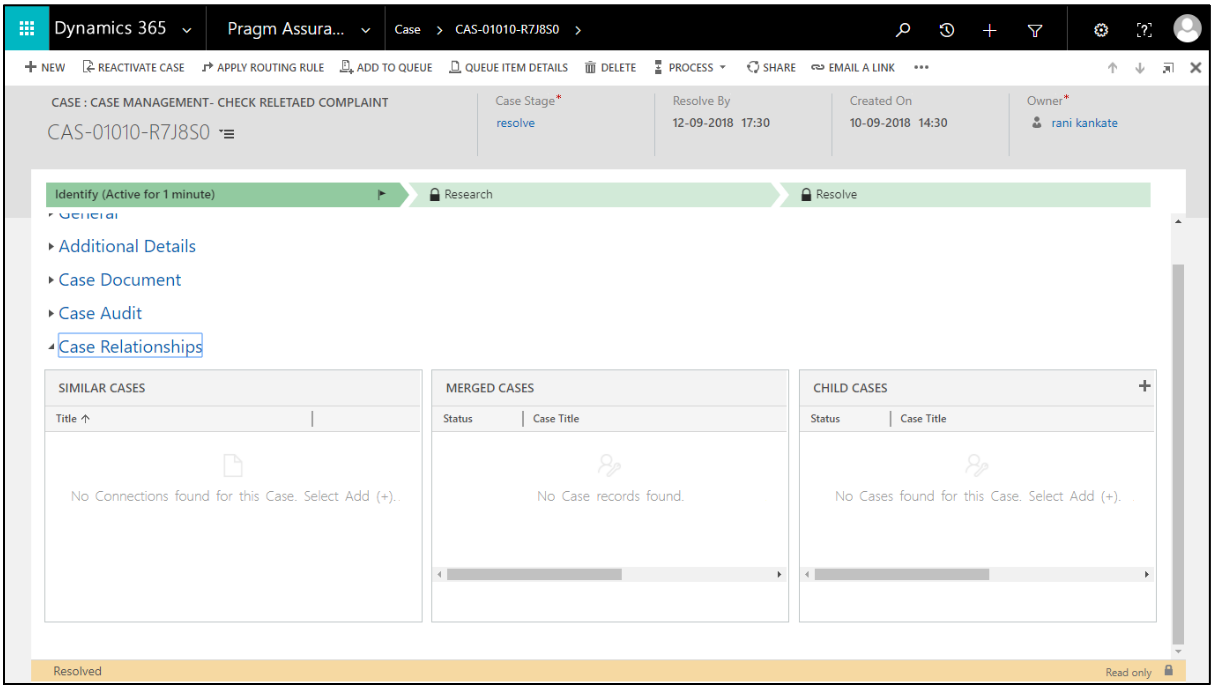
11. To view Audit, click on tab **Case** Audit.



12. To view Relationship such as child cases, click on tab **Case** Relationship.



4. Conclusion

Thus, Pragmassurance modules enables the below key factors:

- Define masters for various stages of process flow and associated statuses.
- Define different service processes flows based on products / business lines or any other criteria and set up stages and their transition based on different statuses.
- Define assignment rule for each stage with flexibility to assign the case either to individual or queue or team.
- Define Service Level Agreement / Turn Around Time at case level as well as at each stage of resolution process flow.
- Define the communication/notification template for internal and external SMS/Email communication. This helps in providing timely update to customer on progress of the service request.
- Predefined Banking Case Management Dashboards.

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