



PragmaAssurance
Version 1.0.0
Date: 23rd March 2018

Email id: support@pragmasys.in

Pragmasys Consulting LLP, Pune

F, Pinnac Memories Phase III
S No 7 & 8, Near CityPride Multiplex
Kothrud, Pune – 411038

Pragmasys Consulting LLP, Delhi

508-509, Modi Towers,
Nehru Palace,
New Delhi - 110019

Pragmasys Consulting LLP, Mumbai

Unit 326, Lodha Supremus Phase 2
Road No 22, Wagle Estate
Thane(W), 400604

Pragmasys Consulting LLP, Bengaluru

#54, 2nd Floor, 5th Main,
Kodihalli, HAL 2nd Stage, Behind Leela
Palace Hotel.
Bangalore, Karnataka – 560008

Table of Contents

1	Introduction	3
2	Configure Master Data	4
2.1	New Service Type (Case Process, Case SR, Case Sub SR)	4
2.2	Create Stage and Stage Status.....	Error! Bookmark not defined.
2.3	Case Configuration for New Service Type	Error! Bookmark not defined.
2.4	Case Steps for New Service Type (assignment, TAT, next step, etc.)	8
3	Create a Service Request	10
4	Conclusion.....	1Error! Bookmark not defined.

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.

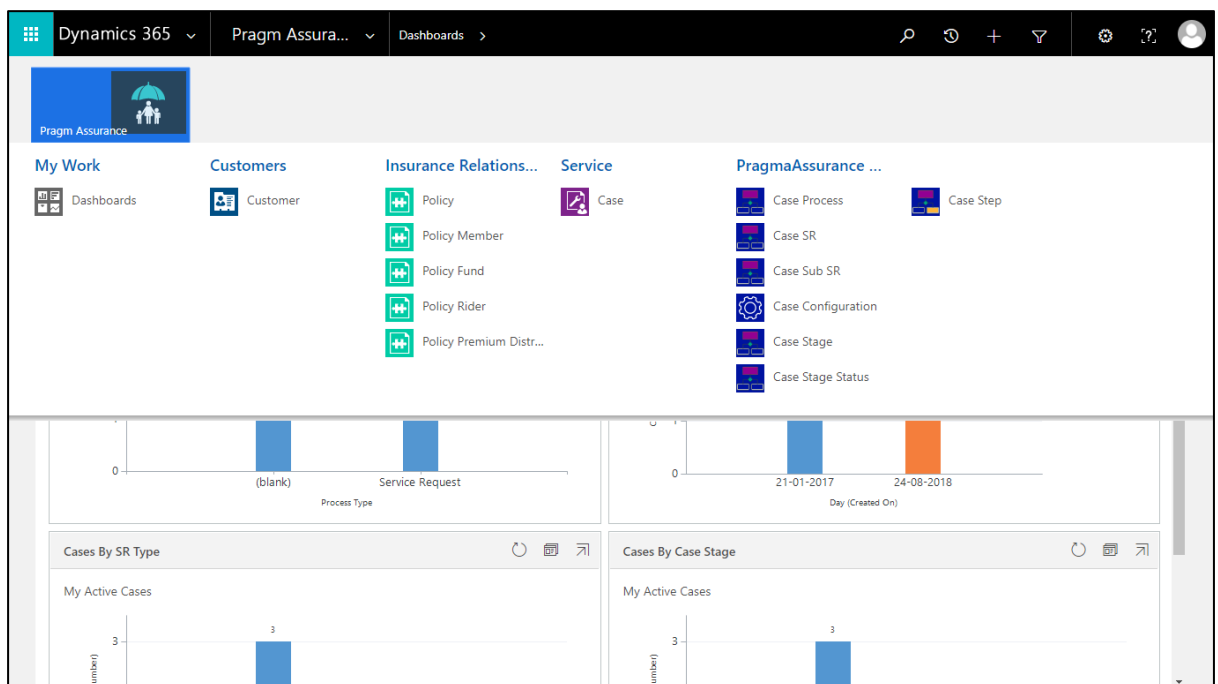
2. Configure Master Data


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.

Dynamics 365 | **Pragm Assura...** | **Case Process** > **Servicing - Alteration**


Created On: 07-09-2018 11:32 | Created By: rani kankate

CASE PROCESS : INFORMATION
Servicing - Alteration

Details	
Name *	Servicing - Alteration
Process Code	.....

Modified On: 07-09-2018 11:32 | Modified By: rani kankate

Active

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.

Dynamics 365 | **Pragm Assura...** | **Case SR** > **Alteration - Client le...**


Created On: 07-09-2018 11:35 | Created By: rani kankate

CASE SR : INFORMATION
Alteration - Client level

Details	
Name *	Alteration - Client level
SR Code	.....
IRDA Code	.....

Modified On: 07-09-2018 11:35 | Modified By: rani kankate

Active

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.

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

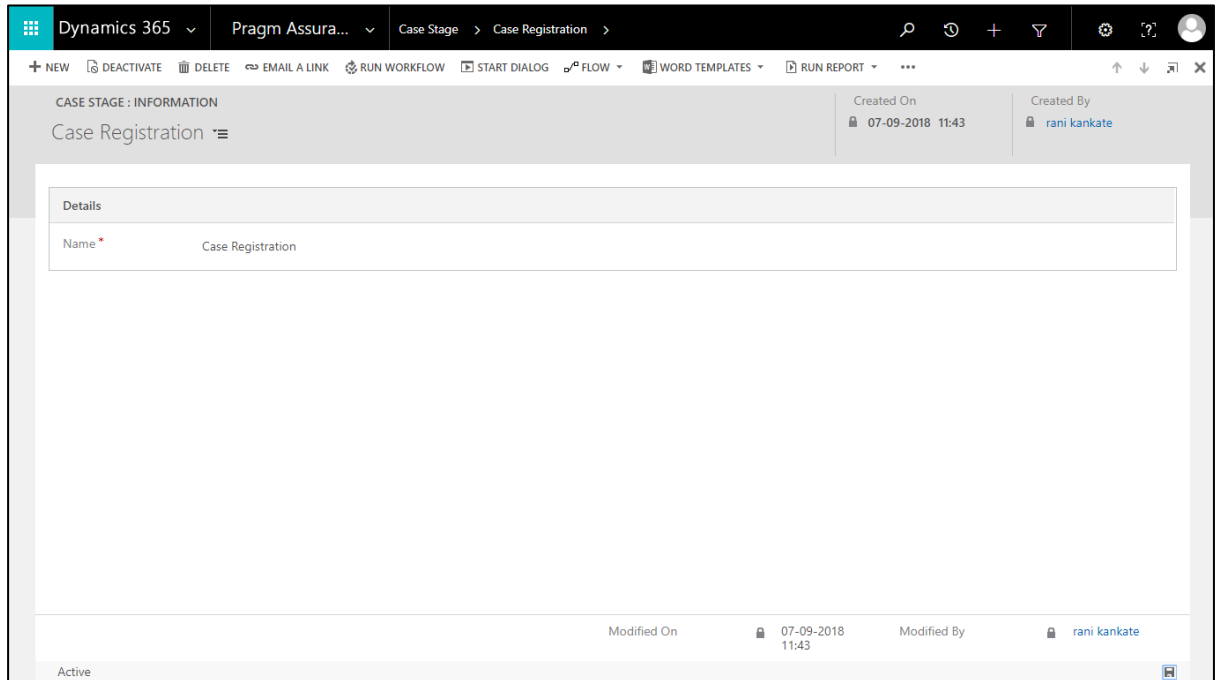
Modified On: 07-09-2018 11:37 | Modified By: rani kankate

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.



The screenshot shows the Dynamics 365 interface for creating a new Case Stage. The top navigation bar includes 'Dynamics 365', 'Pragm Assura...', and 'Case Stage > Case Registration'. Below the navigation bar, there is a toolbar with options like '+ NEW', 'DEACTIVATE', 'DELETE', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', 'FLOW', 'WORD TEMPLATES', and 'RUN REPORT'. The main content area is titled 'CASE STAGE : INFORMATION' and 'Case Registration'. It features a 'Details' section with a 'Name' field containing 'Case Registration'. On the right side, there is a 'Created On' field showing '07-09-2018 11:43' and a 'Created By' field showing 'rani kankate'. At the bottom, there is a 'Modified On' field showing '07-09-2018 11:43' and a 'Modified By' field showing 'rani kankate'. The status 'Active' is displayed at the bottom left.

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.

Dynamics 365 | **Pragm Assura...** | **Case Stage Status** > **pending**

Case Stage Status : INFORMATION

pending

Created On: 07-09-2018 11:44 | Created By: rani kankate


Details	
Name *	pending

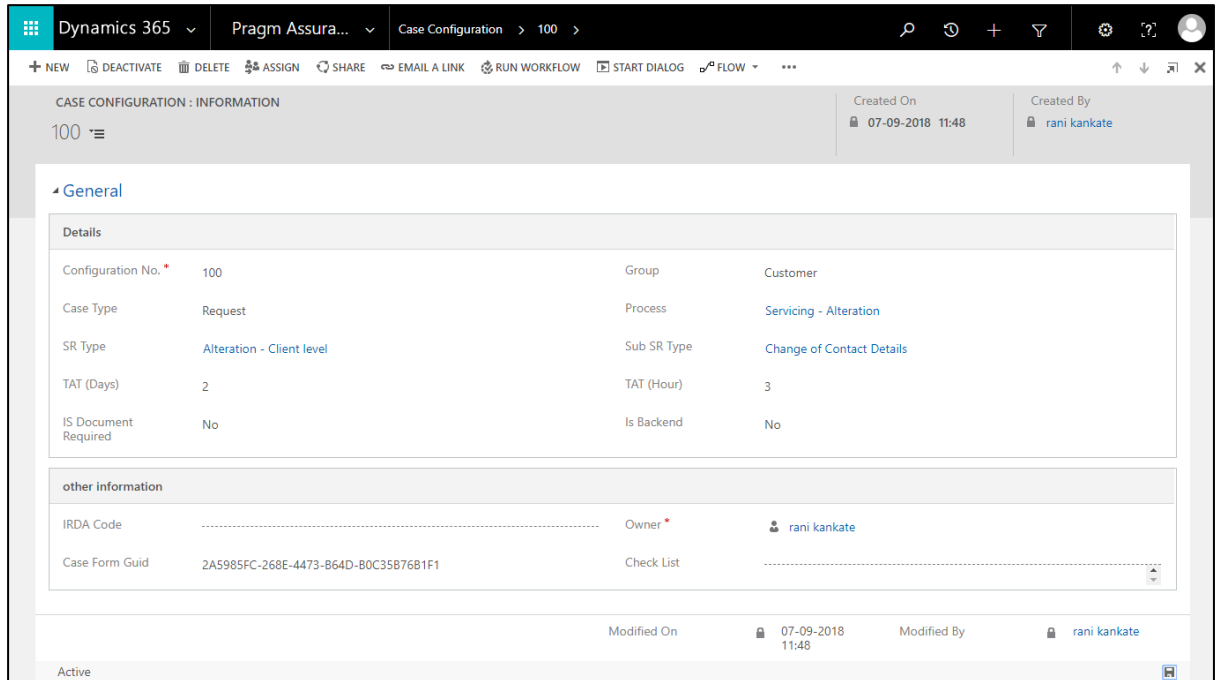
Modified On: 07-09-2018 11:44 | Modified By: rani kankate

Active

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.



The screenshot shows the Dynamics 365 interface for Case Configuration. The top navigation bar includes 'Dynamics 365', 'Pragm Assura...', and 'Case Configuration > 100'. The main header area displays 'CASE CONFIGURATION : INFORMATION' with a sub-header '100'. On the right, it shows 'Created On: 07-09-2018 11:48' and 'Created By: rani kankate'. The 'General' tab is active, showing a 'Details' section with the following fields:

Configuration No. *	100	Group	Customer
Case Type	Request	Process	Servicing - Alteration
SR Type	Alteration - Client level	Sub SR Type	Change of Contact Details
TAT (Days)	2	TAT (Hour)	3
IS Document Required	No	Is Backend	No

Below the details is the 'other information' section:

IRDA Code	.....	Owner *	rani kankate
Case Form Guid	2A5985FC-268E-4473-B64D-B0C35B7681F1	Check List	.....


At the bottom, it shows 'Modified On: 07-09-2018 11:48' and 'Modified By: rani kankate'. The status 'Active' is indicated at the bottom left.

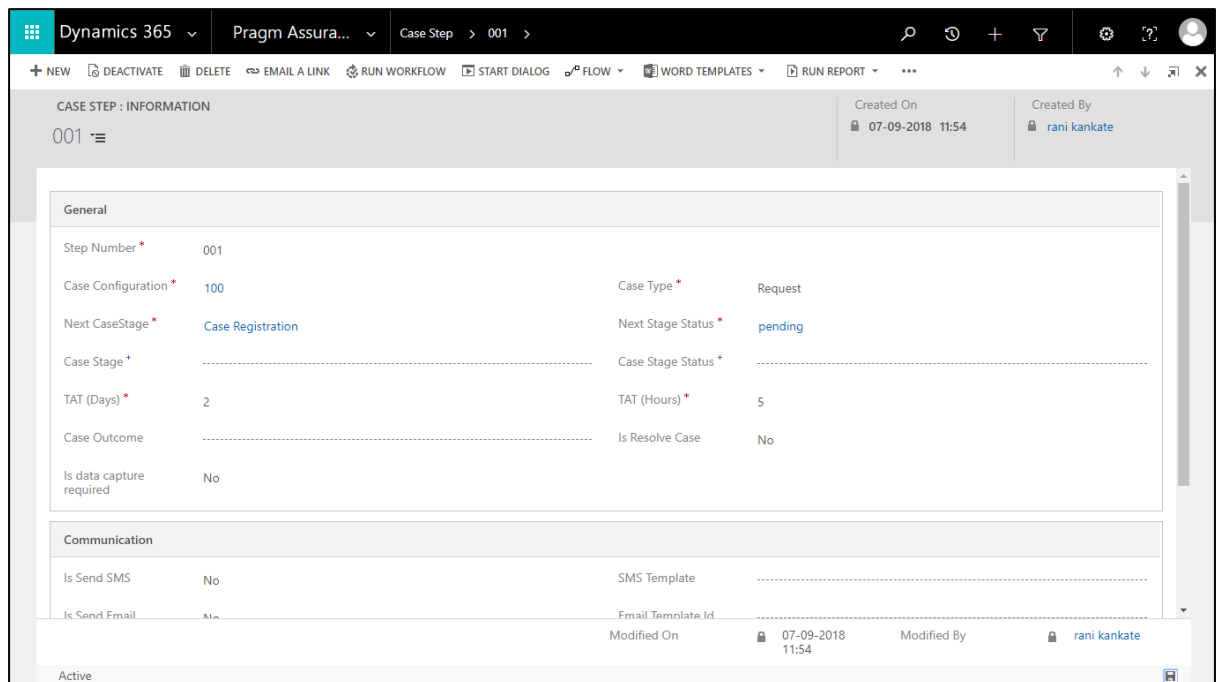
2. Enter case configuration no. which is running sequence no.
3. Select Service Requests Group. i.e. Customer or Advisor
4. Select Service Request type i.e. Request, Complaint etc.
5. Select Process, SR Type, Sub SR Type.
6. Enter the Turnaround time /SLA required to resolve this service request in days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

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.



CASE STEP : INFORMATION				Created On	Created By
001				07-09-2018 11:54	rani kankate
General					
Step Number *	001	Case Type *	Request		
Case Configuration *	100	Next Stage Status *	pending		
Next CaseStage *	Case Registration	Case Stage Status *			
Case Stage *		TAT (Days) *	2		
TAT (Hours) *	5	Case Outcome			
Is data capture required	No	Is Resolve Case	No		
Communication					
Is Send SMS	No	SMS Template			
Is Send Email	No	Email Template Id			
Modified On		07-09-2018 11:54	Modified By		rani kankate
Active					

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

Dynamics 365 | **Pragm Assura...** | **Case Step** > 002 >

+ NEW | DEACTIVATE | DELETE | EMAIL A LINK | RUN WORKFLOW | START DIALOG | FLOW | WORD TEMPLATES | RUN REPORT | ...

CASE STEP : INFORMATION

002

Created On: 07-09-2018 12:05 | Created By: rani kankate

General

Step Number *	002	Case Type *	Request
Case Configuration *	100	Next Stage Status *	pending
Next CaseStage *	Insurance service department decision	Case Stage Status *	Submit to insurance service provided department
Case Stage *	Case Registration	TAT (Hours) *	9
TAT (Days) *	1	Is Resolve Case	No
Case Outcome			
Is data capture required	No		

Communication

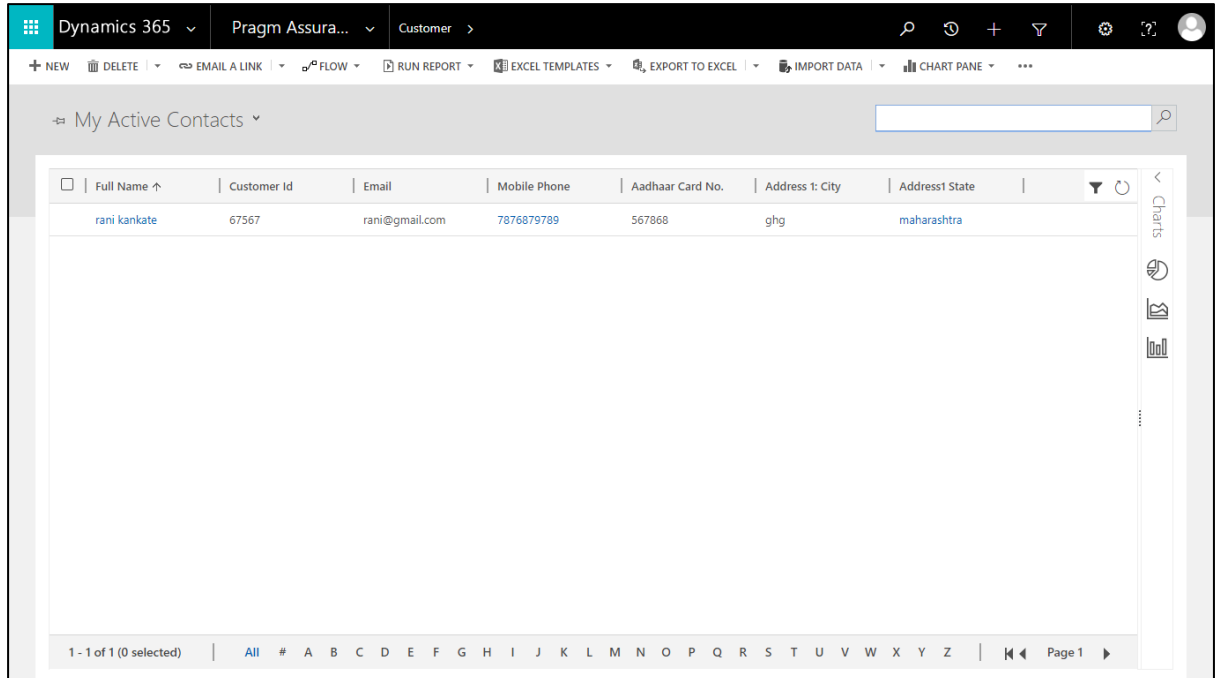
Is Send SMS	No	SMS Template	
Is Send Email	No	Email Template Id	
Modified On		07-09-2018 12:05	Modified By
			rani kankate

Active

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.

3. Create a Service Request

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

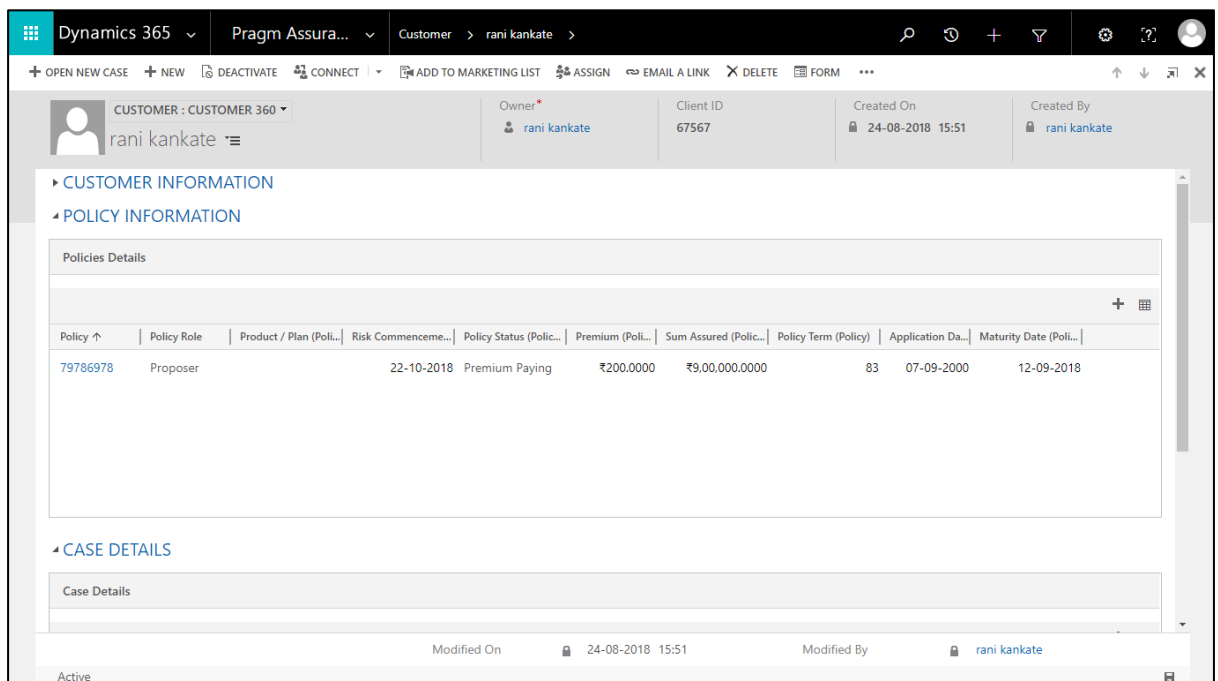


The screenshot shows the Dynamics 365 interface for a customer named 'rani kankate'. The 'My Active Contacts' section displays a table with the following data:

Full Name	Customer Id	Email	Mobile Phone	Aadhaar Card No.	Address 1: City	Address1 State
rani kankate	67567	rani@gmail.com	7876879789	567868	ghg	maharashtra

The interface also shows a search bar, a filter icon, and a 'Charts' sidebar on the right. The bottom status bar indicates '1 - 1 of 1 (0 selected)' and 'Page 1'.

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

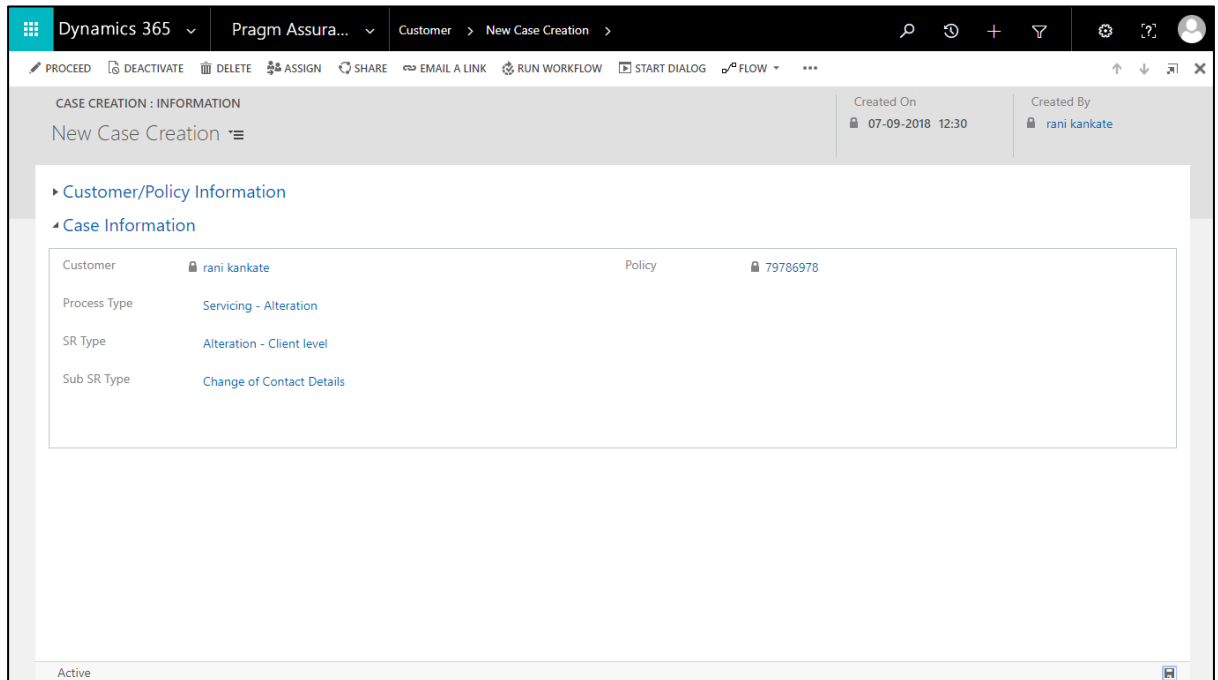


The screenshot shows the Dynamics 365 interface for a customer named 'rani kankate'. The 'Policy Information' section displays a table with the following data:

Policy	Policy Role	Product / Plan (Pol...)	Risk Commenceme...	Policy Status (Polic...	Premium (Polic...	Sum Assured (Polic...	Policy Term (Policy)	Application Da...	Maturity Date (Poli...
79786978	Proposer		22-10-2018	Premium Paying	₹200.0000	₹9,00,000.0000	83	07-09-2000	12-09-2018

The interface also shows a 'CUSTOMER INFORMATION' section with details like 'Owner: rani kankate', 'Client ID: 67567', 'Created On: 24-08-2018 15:51', and 'Created By: rani kankate'. The bottom status bar indicates 'Modified On: 24-08-2018 15:51' and 'Modified By: rani kankate'.

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



Dynamics 365 | **Pragm Assura...** | **Customer** > **New Case Creation**

PROCEED | DEACTIVATE | DELETE | ASSIGN | SHARE | EMAIL A LINK | RUN WORKFLOW | START DIALOG | FLOW | ...

CASE CREATION : INFORMATION

New Case Creation

Created On: 07-09-2018 12:30 | Created By: rani kankate

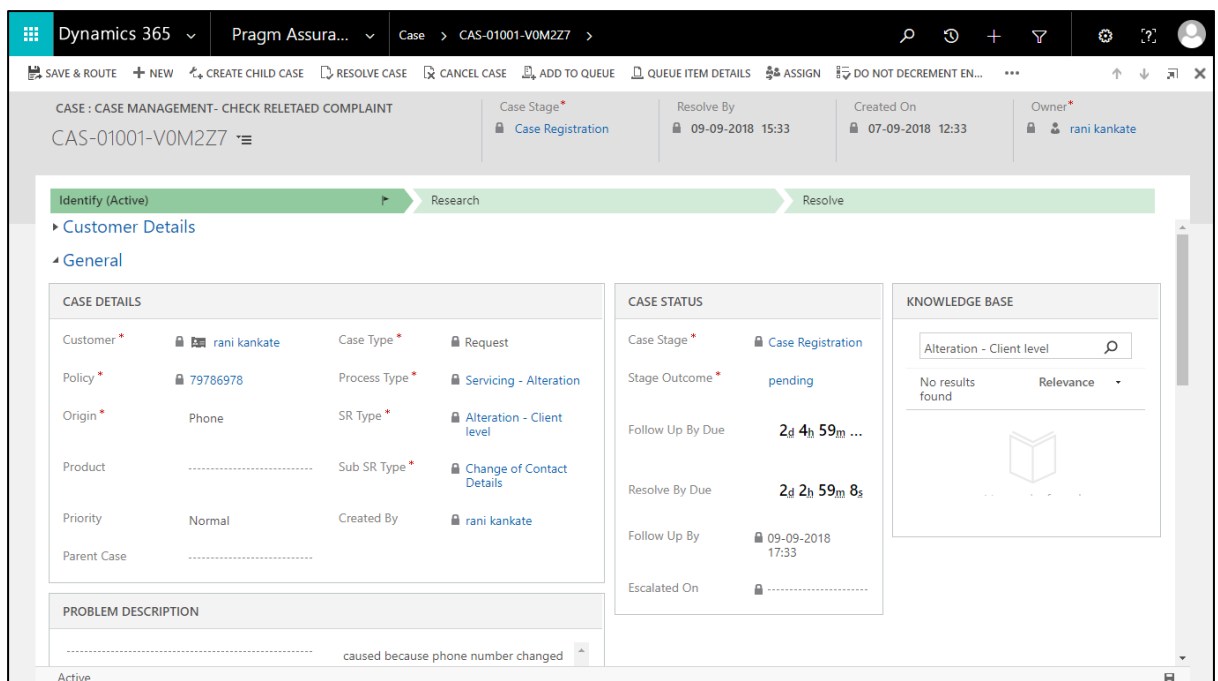
▶ **Customer/Policy Information**

▶ **Case Information**

Customer	rani kankate	Policy	79786978
Process Type	Servicing - Alteration		
SR Type	Alteration - Client level		
Sub SR Type	Change of Contact Details		

Active

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.



Dynamics 365 | **Pragm Assura...** | **Case** > **CAS-01001-V0M2Z7**

SAVE & ROUTE | NEW | CREATE CHILD CASE | RESOLVE CASE | CANCEL CASE | ADD TO QUEUE | QUEUE ITEM DETAILS | ASSIGN | DO NOT DECREMENT EN... | ...

CASE : CASE MANAGEMENT- CHECK RELETAED COMPLAINT

CAS-01001-V0M2Z7

Case Stage*: Case Registration | Resolve By: 09-09-2018 15:33 | Created On: 07-09-2018 12:33 | Owner*: rani kankate

Identify (Active) | Research | Resolve

▶ **Customer Details**

▶ **General**

CASE DETAILS			
Customer *	rani kankate	Case Type *	Request
Policy *	79786978	Process Type *	Servicing - Alteration
Origin *	Phone	SR Type *	Alteration - Client level
Product		Sub SR Type *	Change of Contact Details
Priority	Normal	Created By	rani kankate
Parent Case			

CASE STATUS	
Case Stage *	Case Registration
Stage Outcome *	pending
Follow Up By Due	2d 4h 59m ...
Resolve By Due	2d 2h 59m 8s
Follow Up By	09-09-2018 17:33
Escalated On	

KNOWLEDGE BASE

Alteration - Client level

No results found

Relevance

caused because phone number changed

Active

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.

Dynamics 365 | Pragm Assura... | Case > CAS-01010-R7J8S0

NEW | REACTIVATE CASE | APPLY ROUTING RULE | ADD TO QUEUE | QUEUE ITEM DETAILS | DELETE | PROCESS | SHARE | EMAIL A LINK

CASE : CASE MANAGEMENT- CHECK RELETAED COMPLAINT
CAS-01010-R7J8S0

Case Stage: **resolve** | Resolve By: 12-09-2018 17:30 | Created On: 10-09-2018 14:30 | Owner: rani kankate

Identify (Active for 1 minute) | Research | Resolve

Customer Details

General

CASE DETAILS			
Customer *	rani kankate	Case Type *	Request
Policy *	79786978	Process Type *	Servicing - Alteration
Origin *	Email	SR Type *	Alteration - Client level
Product	.....	Sub SR Type *	Change of Contact Details
Priority	Normal	Created By	rani kankate
Parent Case	.....	

CASE STATUS	
Case Stage *	resolve
Stage Outcome *	completed
Follow Up By Due	✓ Succeeded
Resolve By Due	✓ Succeeded
Follow Up By	11-09-2018 15:32
Escalated On	.....

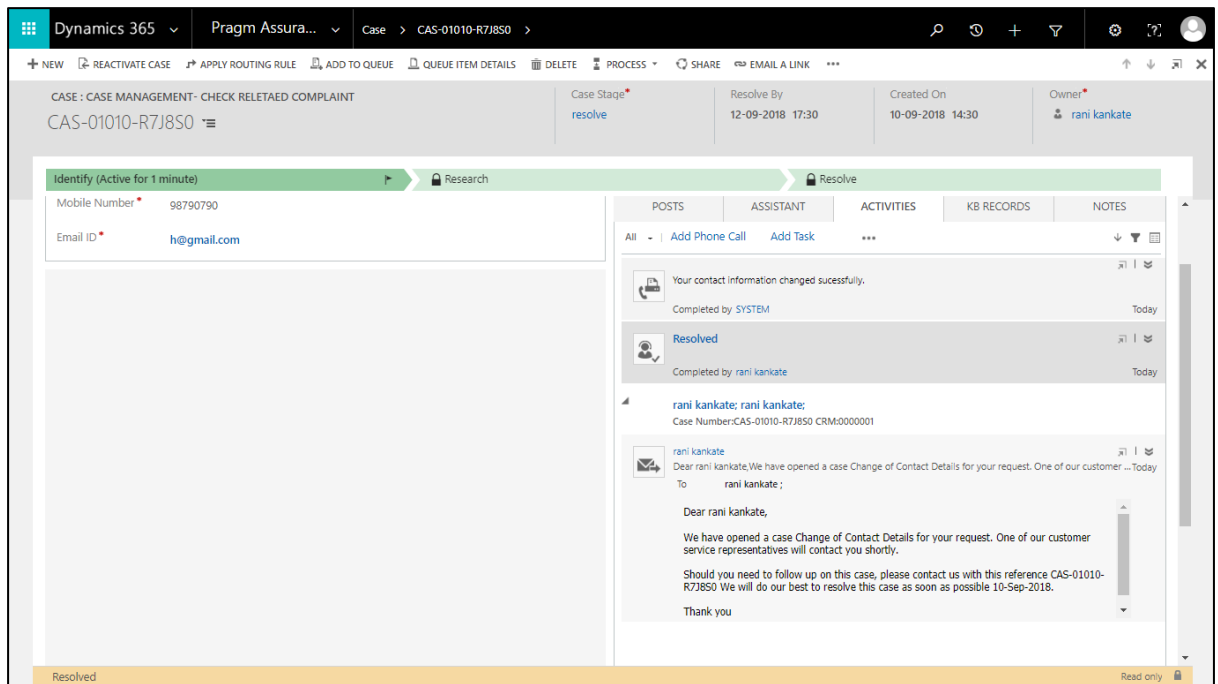
KNOWLEDGE BASE	
Alteration - Client level	Relevance
No results found	

PROBLEM DESCRIPTION

..... truytuuy

Resolved | Read only

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



Dynamics 365 | **Pragm Assura...** | Case > CAS-01010-R7J8S0

CASE : CASE MANAGEMENT- CHECK RELETAED COMPLAINT
CAS-01010-R7J8S0

Case Stage: **resolve** | Resolve By: 12-09-2018 17:30 | Created On: 10-09-2018 14:30 | Owner: rani kankate

Identify (Active for 1 minute) | Research | Resolve

Mobile Number: 98790790 | Email ID: h@gmail.com

POSTS | ASSISTANT | ACTIVITIES | KB RECORDS | NOTES

All | Add Phone Call | Add Task

Your contact information changed sucessfully.
Completed by SYSTEM | Today

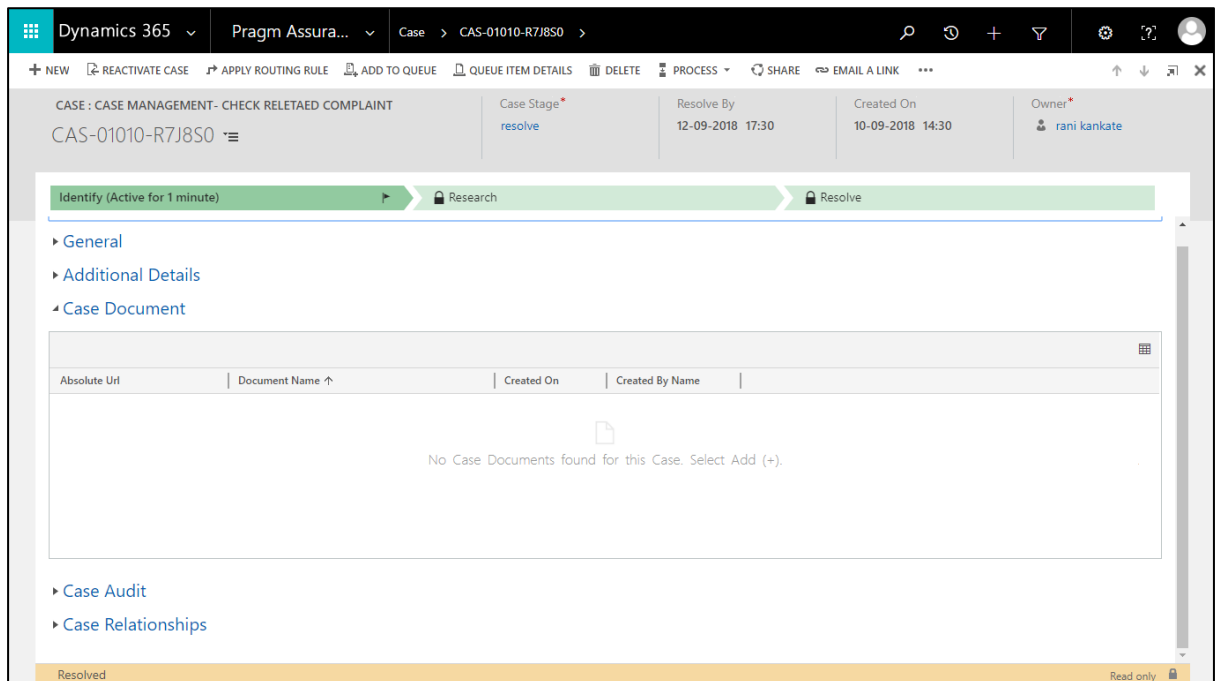
Resolved
Completed by rani kankate | Today

rani kankate; rani kankate;
Case Number: CAS-01010-R7J8S0 CRM:000001

rani kankate
Dear rani kankate, We have opened a case Change of Contact Details for your request. One of our customer service representatives will contact you shortly.
Should you need to follow up on this case, please contact us with this reference CAS-01010-R7J8S0 We will do our best to resolve this case as soon as possible 10-Sep-2018.
Thank you

Resolved | Read only

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



Dynamics 365 | **Pragm Assura...** | Case > CAS-01010-R7J8S0

CASE : CASE MANAGEMENT- CHECK RELETAED COMPLAINT
CAS-01010-R7J8S0

Case Stage: **resolve** | Resolve By: 12-09-2018 17:30 | Created On: 10-09-2018 14:30 | Owner: rani kankate

Identify (Active for 1 minute) | Research | Resolve

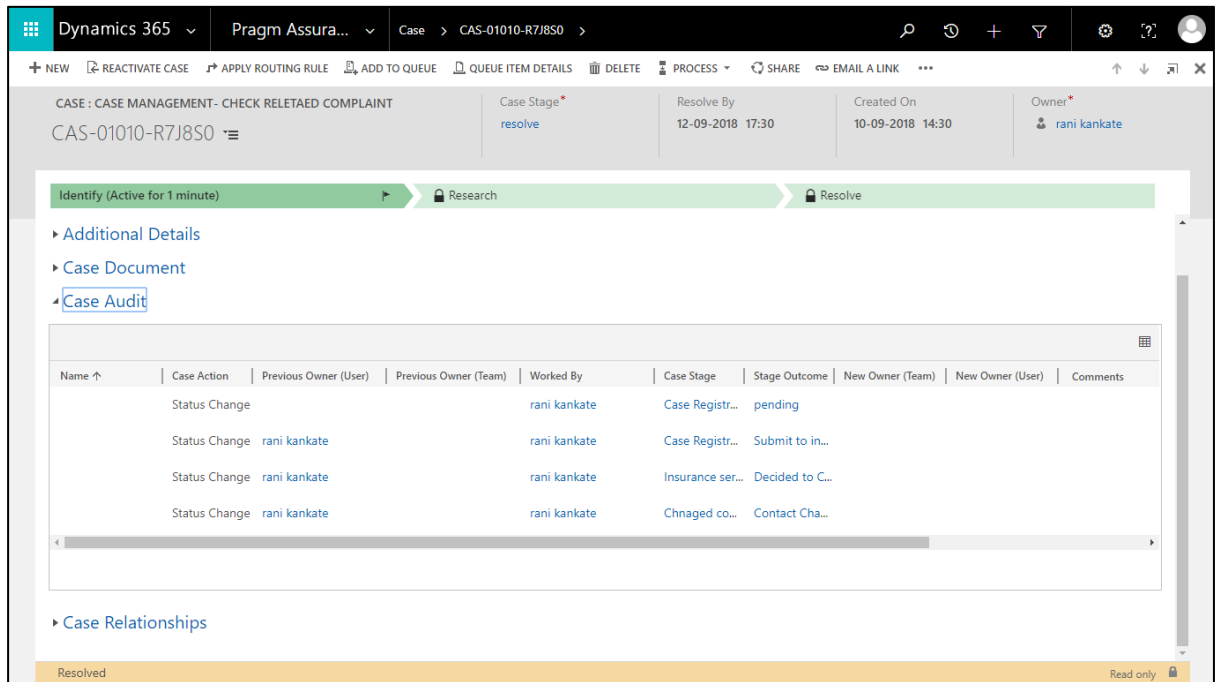
General | Additional Details | **Case Document**

Absolute Url	Document Name	Created On	Created By Name
No Case Documents found for this Case. Select Add (+).			

Case Audit | Case Relationships

Resolved | Read only

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

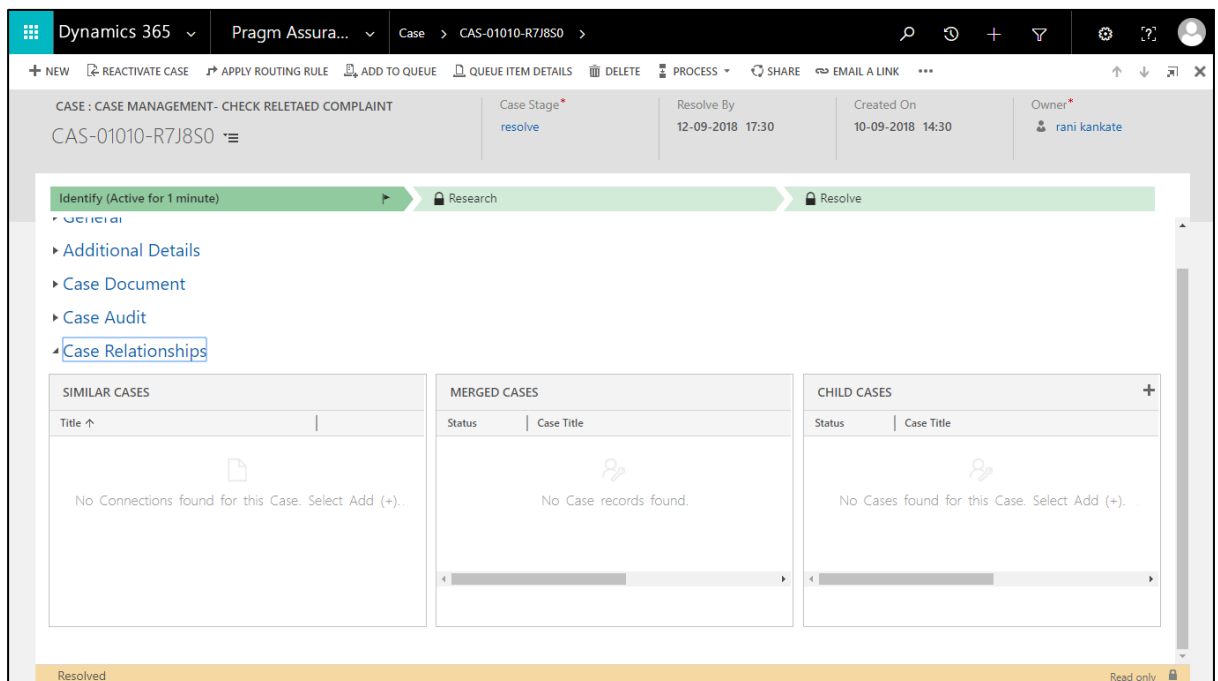


The screenshot shows the Dynamics 365 interface for a case titled "CASE : CASE MANAGEMENT- CHECK RELETAED COMPLAINT" with ID "CAS-01010-R7J8S0". The case is in the "resolve" stage, owned by "rani kankate". The process flow includes "Identify (Active for 1 minute)", "Research", and "Resolve". The "Case Audit" tab is selected, displaying a table of actions.

Name ↑	Case Action	Previous Owner (User)	Previous Owner (Team)	Worked By	Case Stage	Stage Outcome	New Owner (Team)	New Owner (User)	Comments
	Status Change			rani kankate	Case Registr...	pending			
	Status Change	rani kankate		rani kankate	Case Registr...	Submit to in...			
	Status Change	rani kankate		rani kankate	Insurance ser...	Decided to C...			
	Status Change	rani kankate		rani kankate	Chnaged co...	Contact Cha...			

The bottom status bar indicates the case is "Resolved" and is in "Read only" mode.

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



The screenshot shows the Dynamics 365 interface for the same case, with the "Case Relationships" tab selected. It displays three panels: "SIMILAR CASES", "MERGED CASES", and "CHILD CASES". All three panels show "No Connections found for this Case. Select Add (+)."

SIMILAR CASES

Title ↑
No Connections found for this Case. Select Add (+).

MERGED CASES

Status	Case Title
No Case records found.	

CHILD CASES

Status	Case Title
No Cases found for this Case. Select Add (+).	

The bottom status bar indicates the case is "Resolved" and is in "Read only" mode.

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.