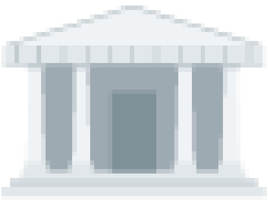

PragmaBanco

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1. Introduction

Ready to Deploy Master Data Driven Customer Service Workflow Automation Solution

- In this era of banking dominated world, it's not the transactional operational but the banks are deciding for the 'Better Customer Handling and Customer satisfaction'. Hence operational efficiencies and differentiated service has become a necessity but that is just not sufficient – consistent customer experience has also become the key. Continuous innovation in banking products, services and processes raise demand for rapid changes in customer service flows further increasing the challenges faced by banking service organizations. **Pragmasys** offers a configurable Customer Service Workflow Automation Solution which transfers the control of setting up the support process flows from developers to banking users. It provides comprehensive banking case management capabilities including ability to define multiple flows based on different criteria, multi-step sequential processes with defined SLAs.

Business users can:

- 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 banking Case either to individual or Queue or team.
- Define Service Level Agreement / Turn Around Time at banking 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.

How does it Benefit Bank Organization?

- Pragmasys Customer Service Workflow Automation solution routes the banking case / service request based on defined process, so 100% compliance is achieved without any lapses. Users are free from assigning it to others and can focus only on their task while system takes care of the routing needs.
- Due to tracking of time to accomplish a task (SLA / TAT) resolution times are improved.
- Eliminates customer call backs for status updates with up-to-date status information on resolution progress.
- Overall this solution provides a consistent and differentiated experience to customers there by improves customer satisfaction.
- Real time changes to the process flows which enables Bank to focus on continuously optimizing the business process without worrying about the development time required for IT teams and reduces dependency on IT teams.
- This also helps in providing consistent user experience across business lines thus improving the user adoption.

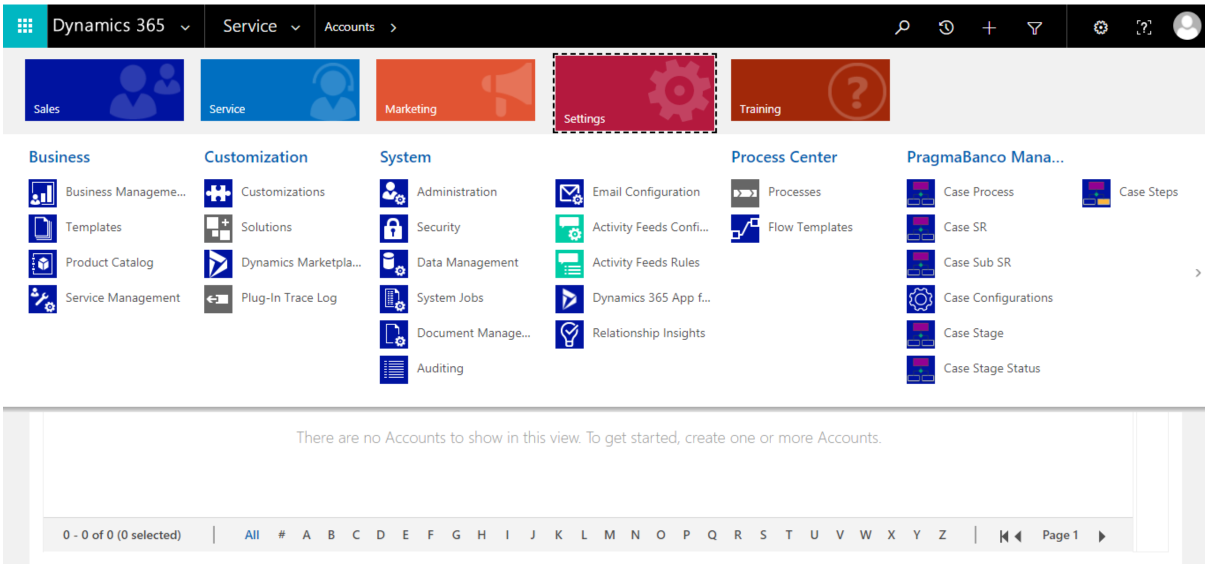
2. Configure Master Data

Configure master data consist of following steps:

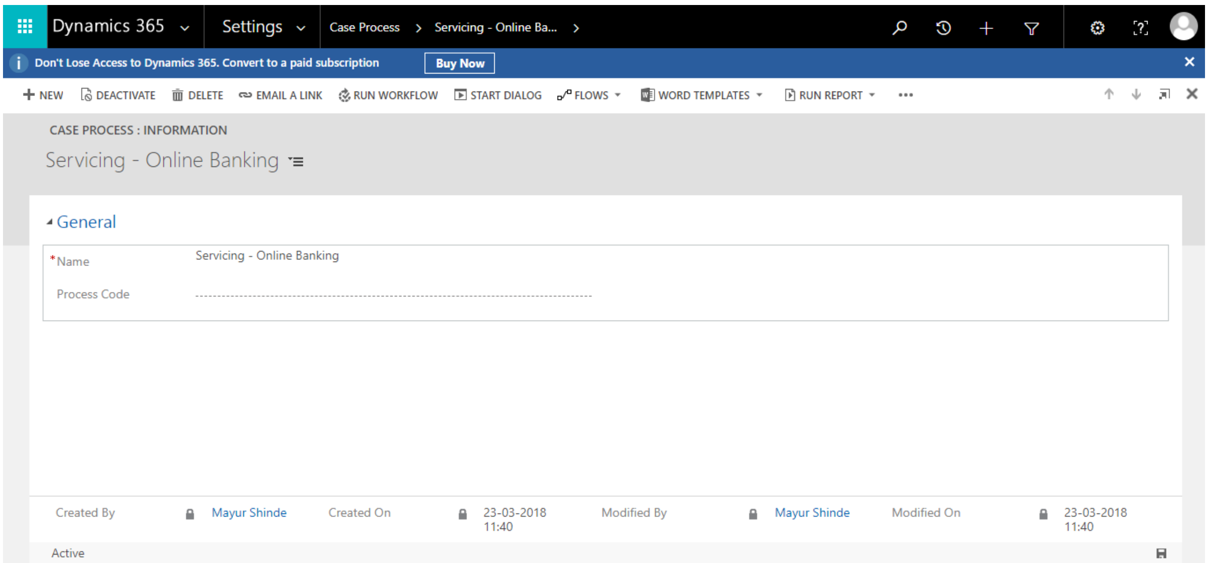
2. 1 New Service Type (Case Process, Case SR, Case Sub SR)

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.

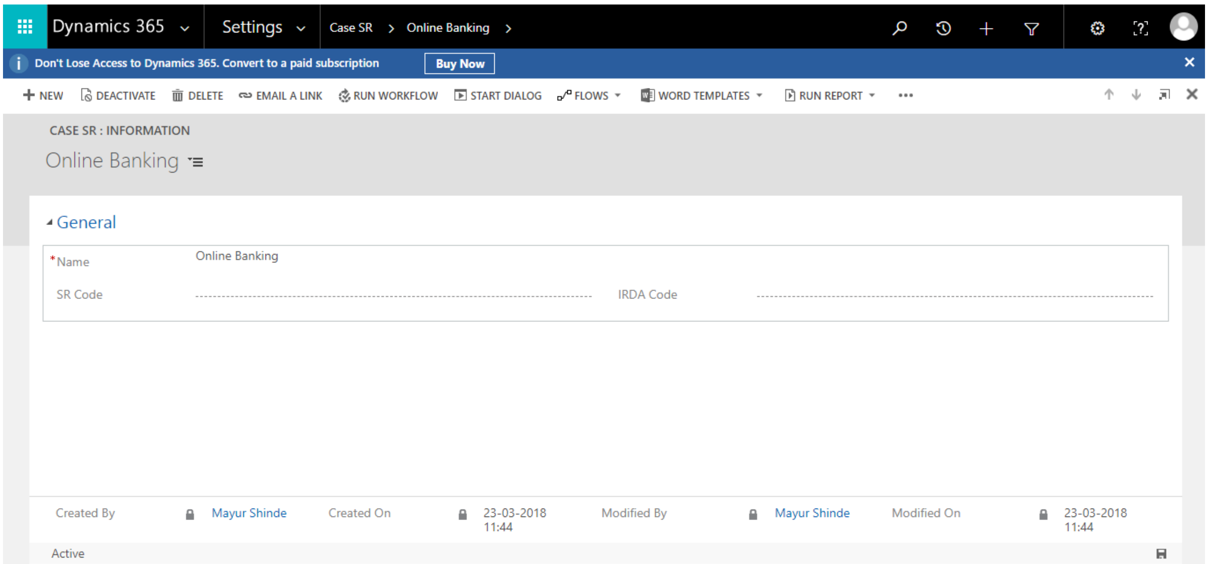
1. To view Case Process, Case SR and Case Sub SR entities, go **PragmaBanco Management Group** inside **Setting** Area.



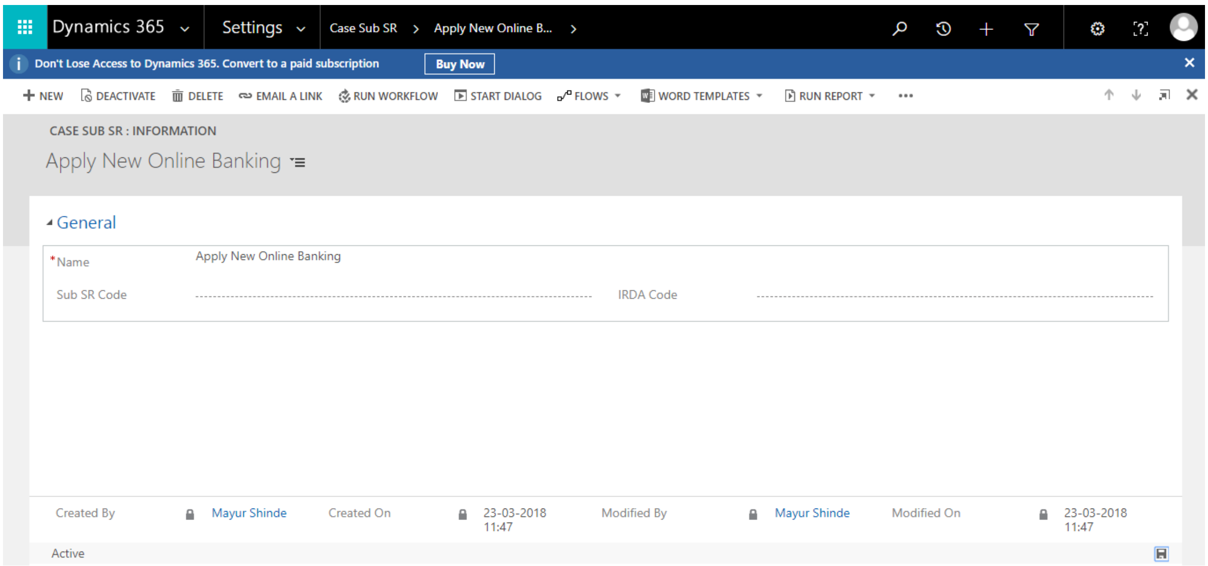
2. Click on Case Process, then Click on New (+) on top left corner, below screen will open. Enter Process name. e.g. Servicing – Online Banking. In the bottom-right corner of the page, click  to Save Process Name.



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



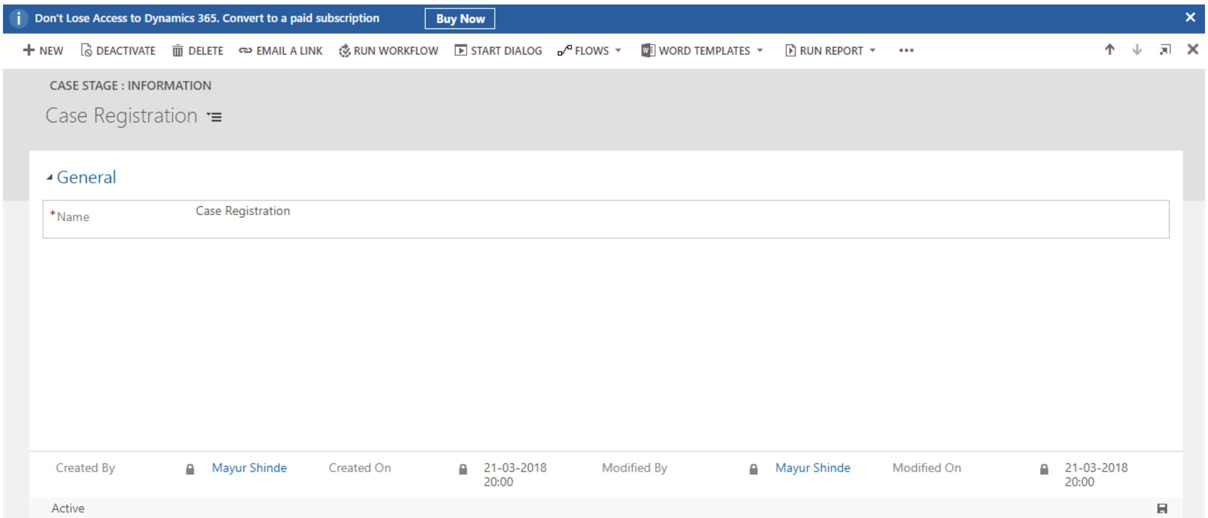
4. Click on Case Sub SR, then Click on New (+) on top left corner, below screen will open. Enter Sub SR (Service Request) name. e.g. Apply New Online Banking. In the bottom-right corner of the page, click to save Sub SR name.



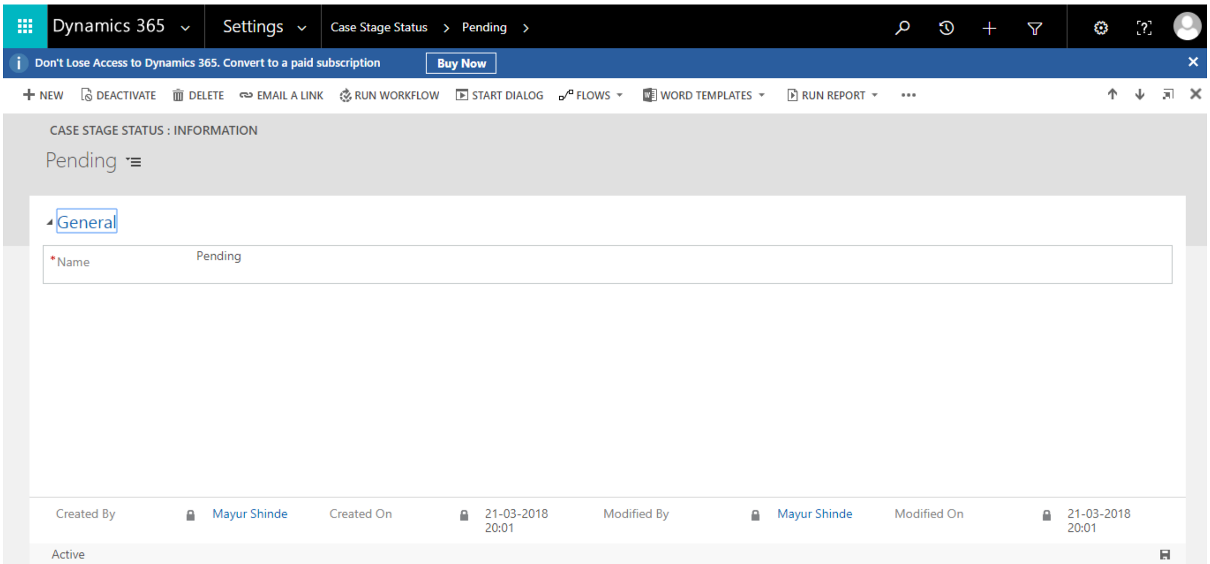
2. 2 Create Stage and Stage Status

To routes the banking 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.



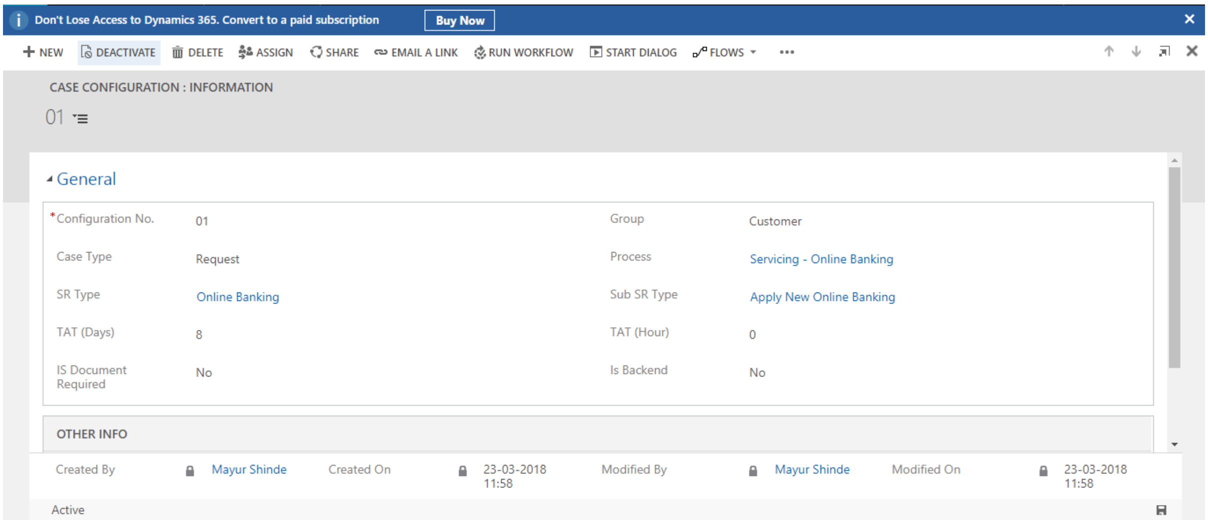
2. Click on Case Stage Status, then Click on New (+) on top left corner, below screen will open. Enter Stage Status name. e.g. Pending. In the bottom-right corner of the page, click to Save Stage Name.



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.



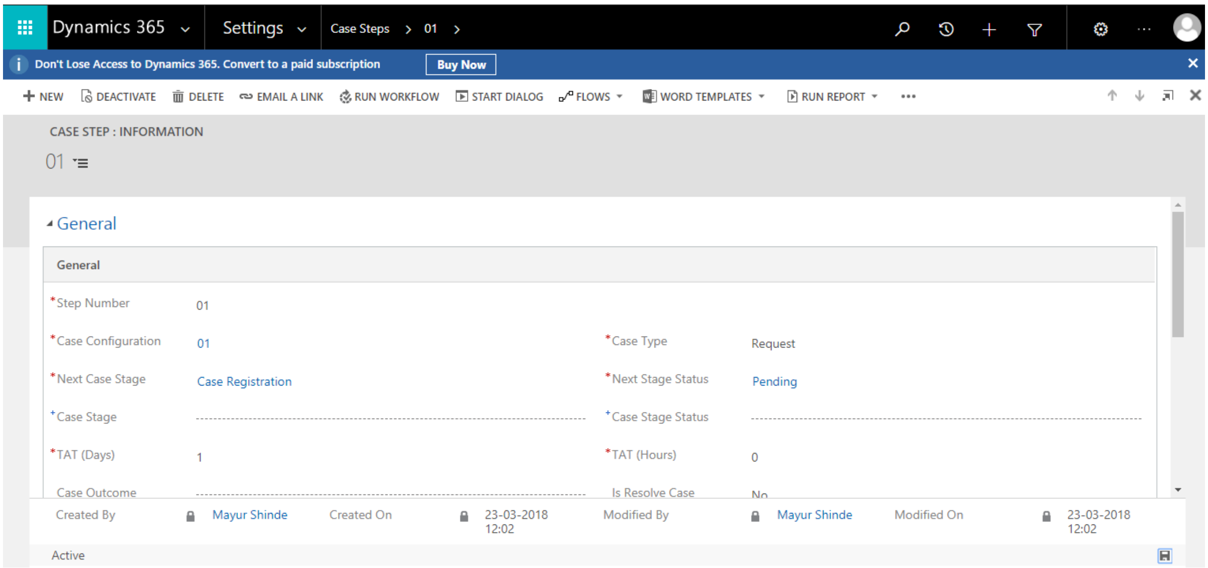
2. Enter case configuration no. which is running sequence no.
3. Select Service Requests Group. i.e. Customer or Advisor
4. Select Service Request type i.e. Request, Complaint etc.
5. Select Process, SR Type, Sub SR Type.
6. Enter the Turnaround time /SLA required to resolve this service request in days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

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

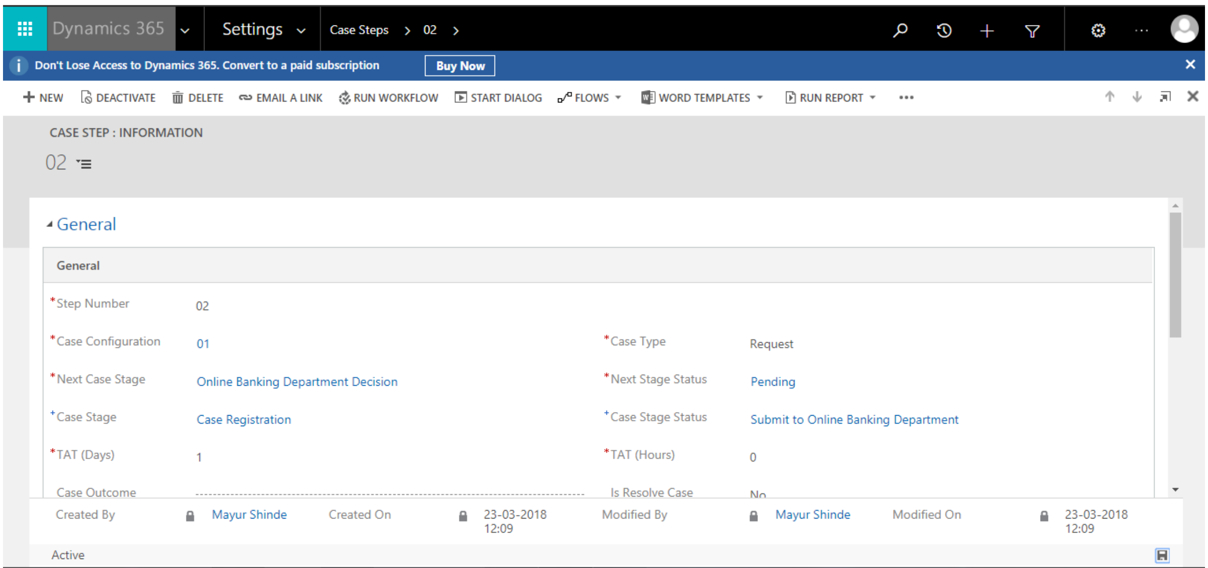
Case step is nothing but steps required to resolve banking case. Steps can be differing case to case, business to business.

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 Stage & Case Stage Status should be blank in the first very step of every new service type.



3. Case Stage & Case Stage Status should be blank in the first very step of every new service type.



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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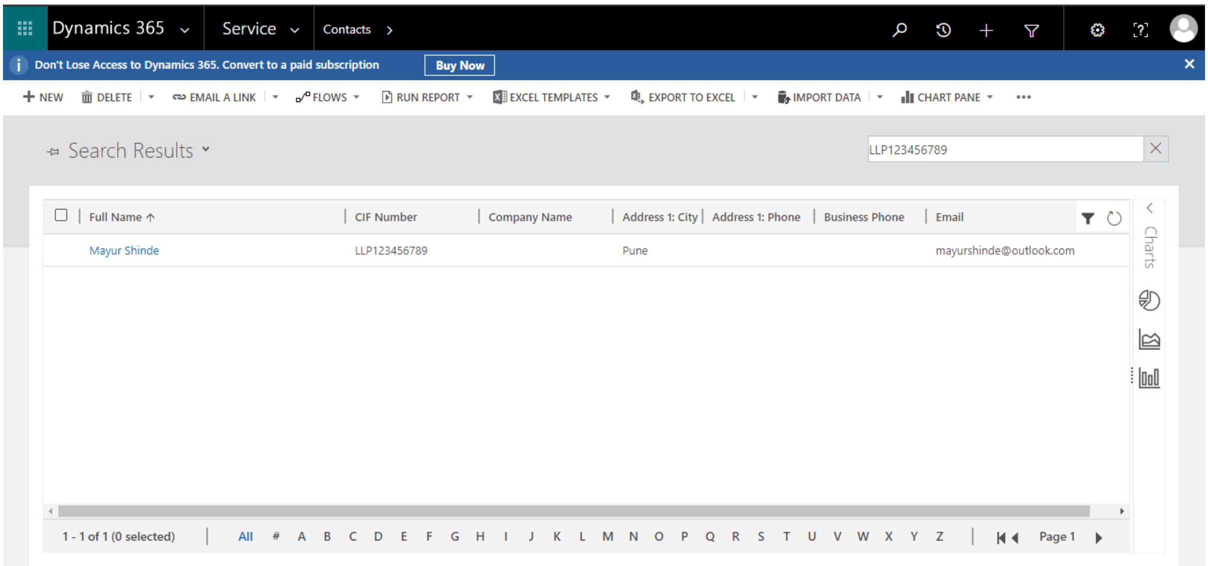
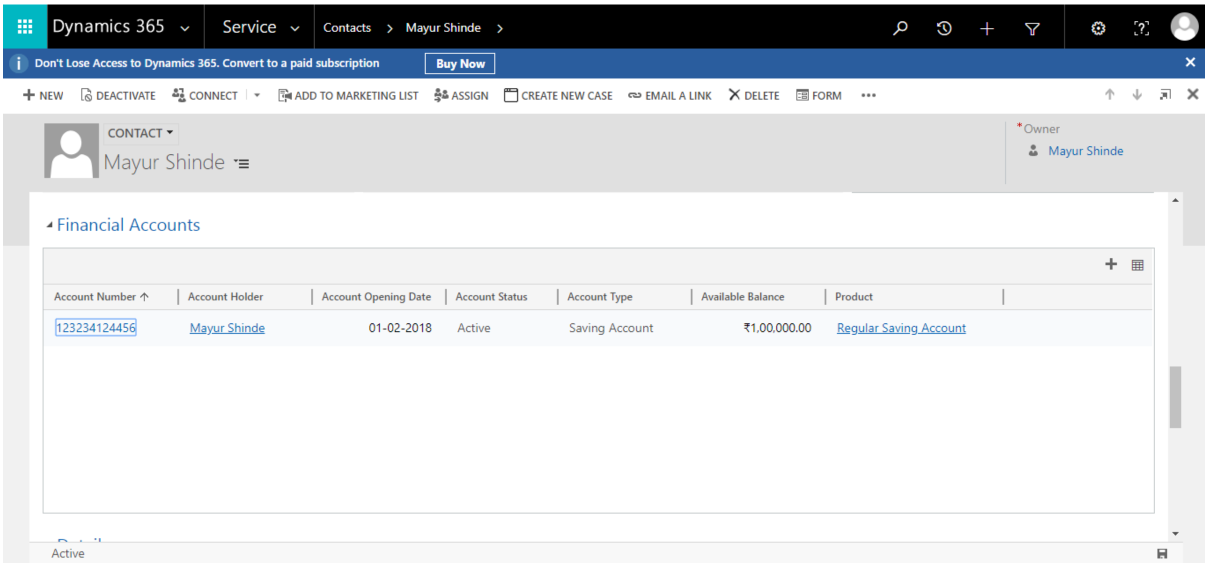
3. Create a Service Request

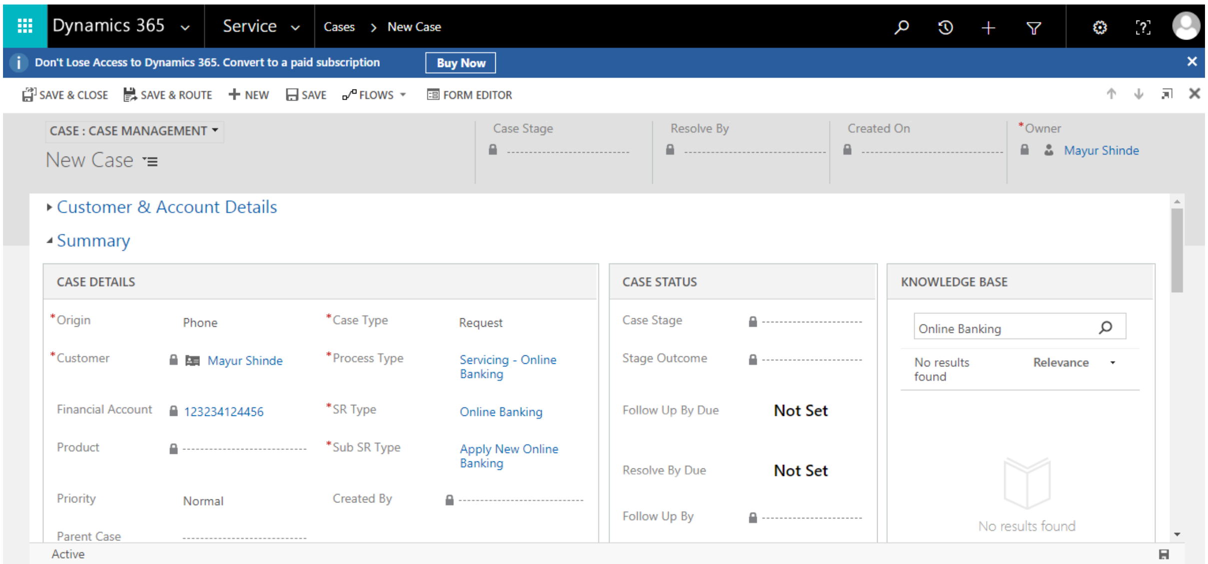
1. To Create New Case, go to **Service** -> **Contacts**-> **Search contact by CIF Number and click on customer name to Open that contact.**



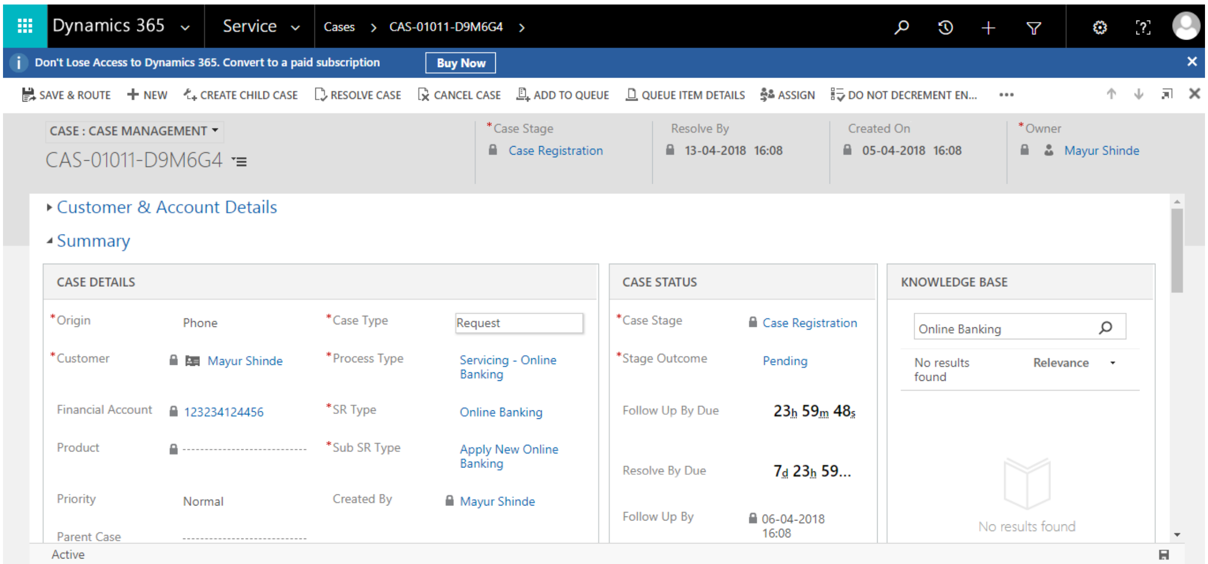
2. After open contact scroll to "Financial Account" section. Select Financial Account from grid and click on "CREATE NEW CASE" button.



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

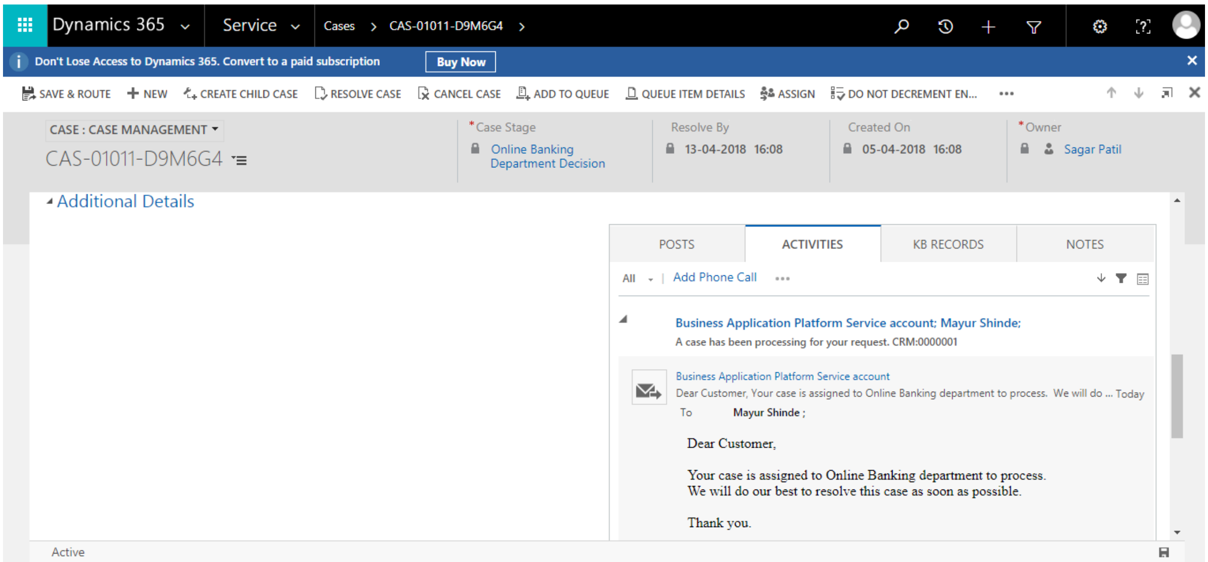


4. Enter mandatory fields like Case Type, Process Type, SR Type, Sub SR Type, Problem Description and Click on **Save**.
5. As soon as case gets save TAT/SLA for Stage and TAT/SLA for SR will be calculated automatically as per defined in configuration and in case status section you able to see count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

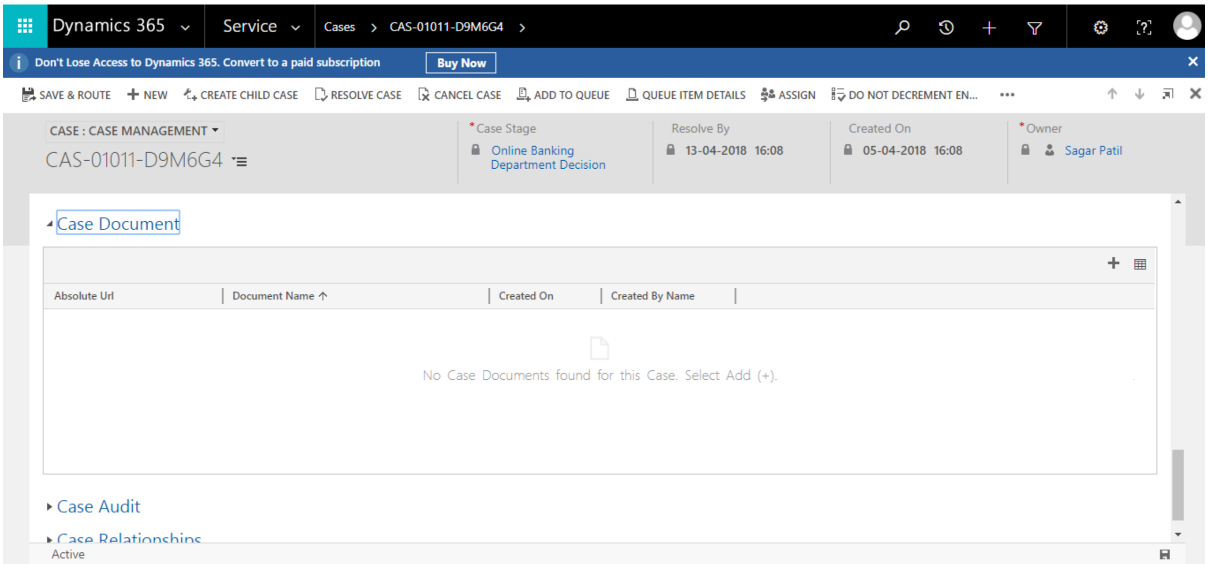


6. Also, case form will show all available (configured) knowledge base available for service request.
7. As per CRM standard a unique id (ticket number) will get generated for case. for generating unique id as per your business standard use **Pragma Auto Number** solution which is available on **Microsoft app source**.
8. After entering all required detail click on **stage outcome** and select **Submit to online banking department** and Click on **save** to move for next process flow.

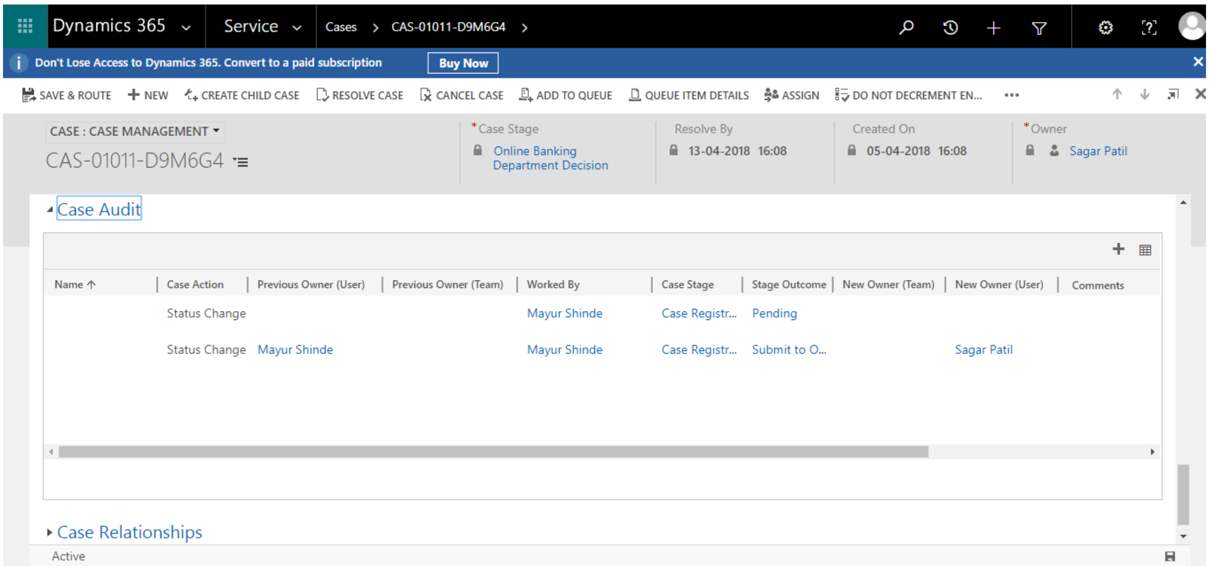
9. To view communication sent to customer click on tab **Additional detail**.



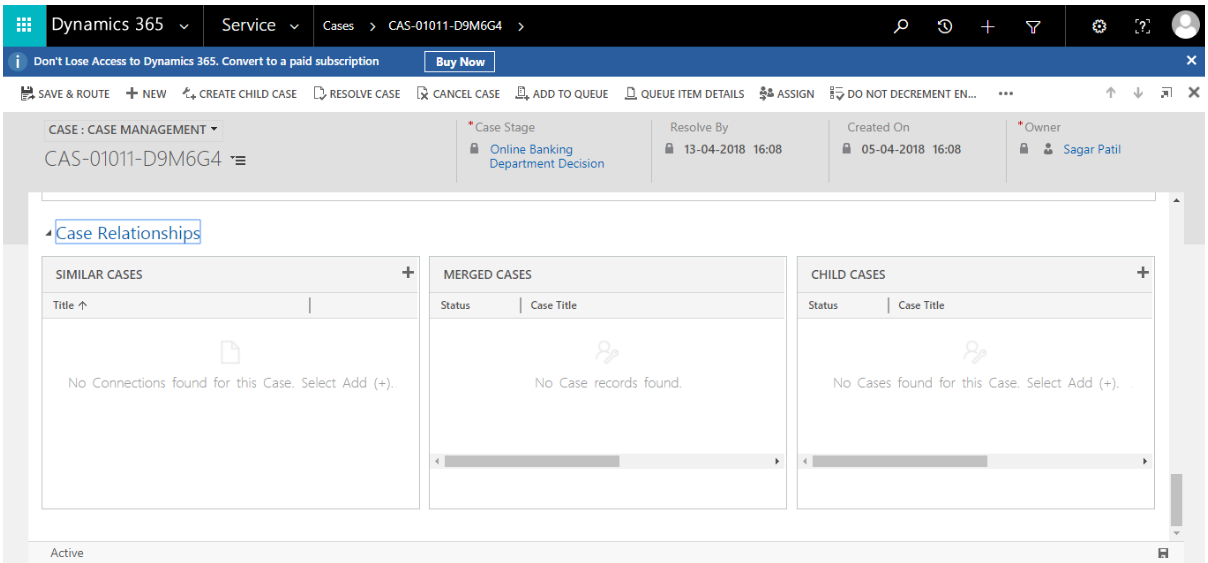
10. To view attached document, click on tab **Case Document**.



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, PragmaBanco modules enables the below key factors:

- ✓ **Centralized Banking Service Management**
- ✓ **Consistent Customer Service**