

PragmaBanco
Version 1.0.0
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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.

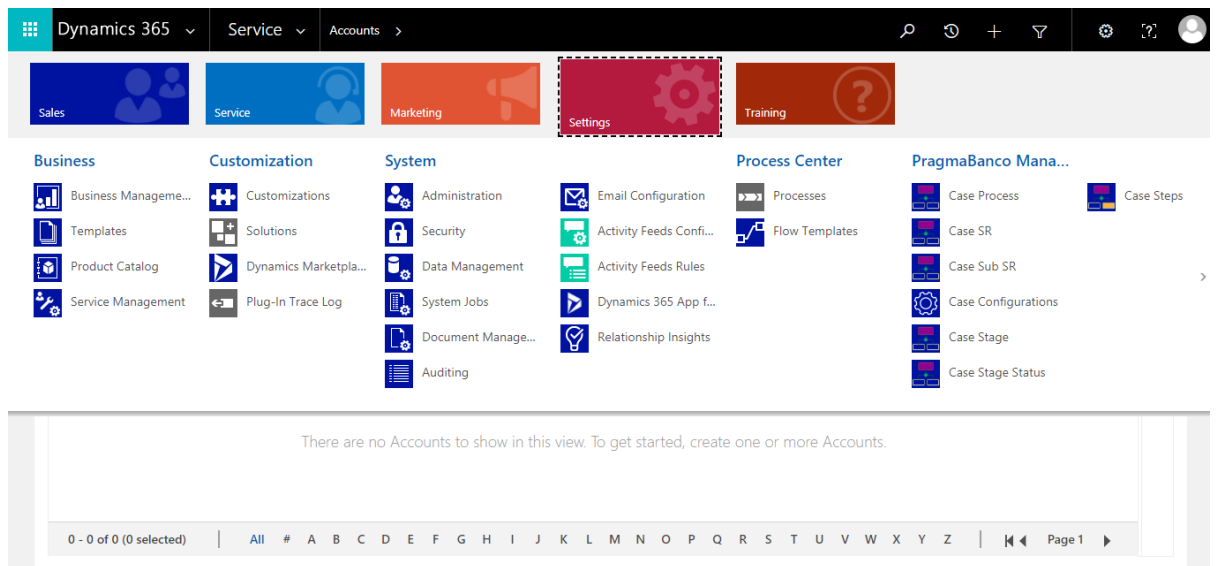
2. Configure Master Data


Configure master data consist of following steps:

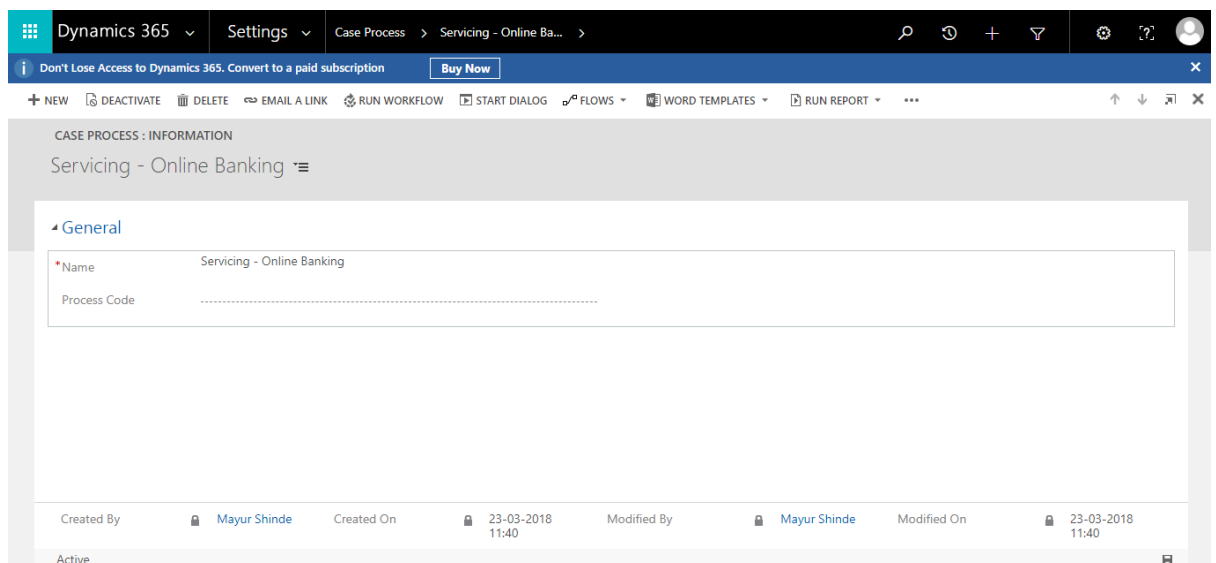
2. 1 New Service Type (Case Process, Case SR, Case Sub SR)


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.

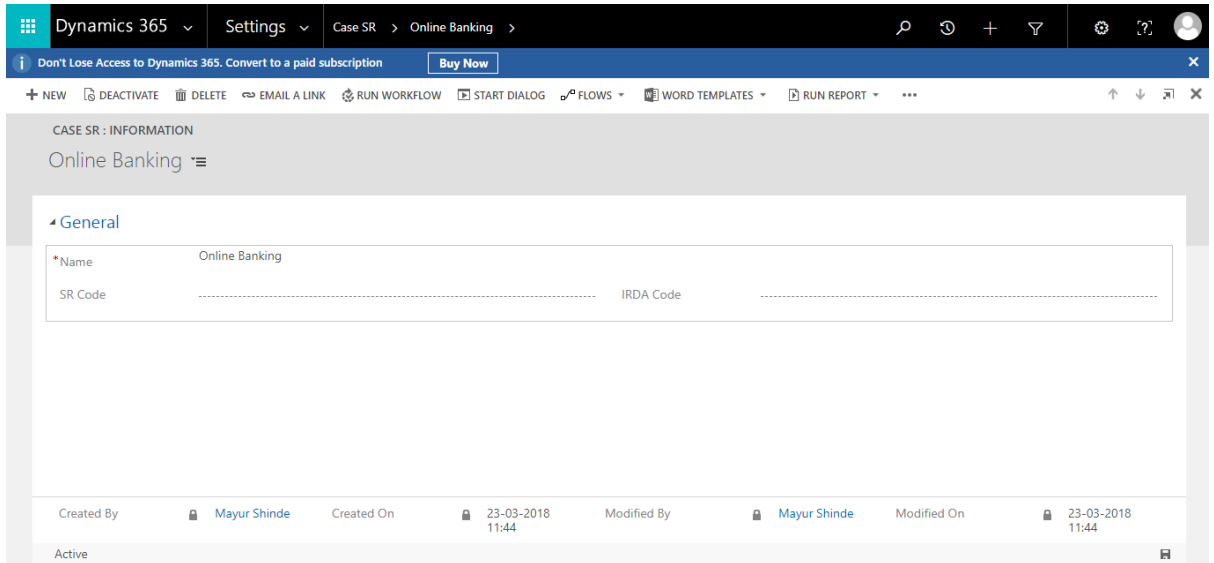
1. To view Case Process, Case SR and Case Sub SR entities, go **PragmaBanco Management Group** inside **Setting Area**.



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.



- 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.




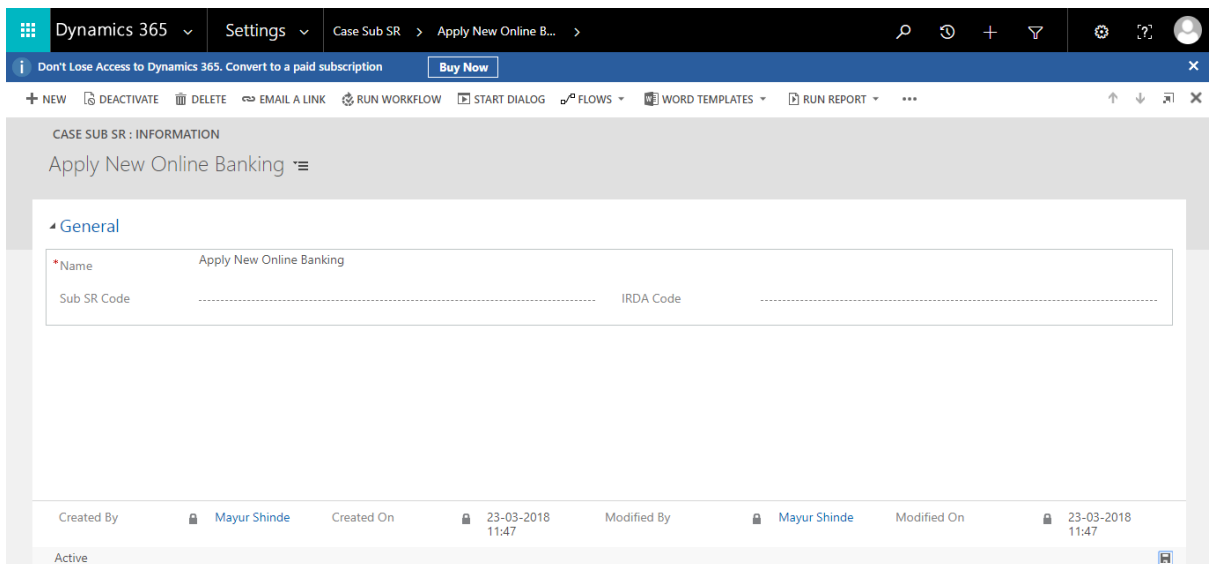
The screenshot shows the Dynamics 365 interface for a Case SR. The breadcrumb trail is: Dynamics 365 > Settings > Case SR > Online Banking. A notification bar at the top says "Don't Lose Access to Dynamics 365. Convert to a paid subscription" with a "Buy Now" button. Below the notification is a toolbar with icons for + NEW, DEACTIVATE, DELETE, EMAIL A LINK, RUN WORKFLOW, START DIALOG, FLOWS, WORD TEMPLATES, RUN REPORT, and a menu icon. The main content area is titled "CASE SR : INFORMATION" and "Online Banking". Under the "General" tab, there is a form with the following fields:

- *Name: Online Banking
- SR Code: (empty)
- IRDA Code: (empty)

 At the bottom, there is a metadata section showing:

- Created By: Mayur Shinde
- Created On: 23-03-2018 11:44
- Modified By: Mayur Shinde
- Modified On: 23-03-2018 11:44
- Active: (checkbox)

- 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.



The screenshot shows the Dynamics 365 interface for a Case Sub SR. The breadcrumb trail is: Dynamics 365 > Settings > Case Sub SR > Apply New Online B... >. A notification bar at the top says "Don't Lose Access to Dynamics 365. Convert to a paid subscription" with a "Buy Now" button. Below the notification is a toolbar with icons for + NEW, DEACTIVATE, DELETE, EMAIL A LINK, RUN WORKFLOW, START DIALOG, FLOWS, WORD TEMPLATES, RUN REPORT, and a menu icon. The main content area is titled "CASE SUB SR : INFORMATION" and "Apply New Online Banking". Under the "General" tab, there is a form with the following fields:


- *Name: Apply New Online Banking
- Sub SR Code: (empty)
- IRDA Code: (empty)

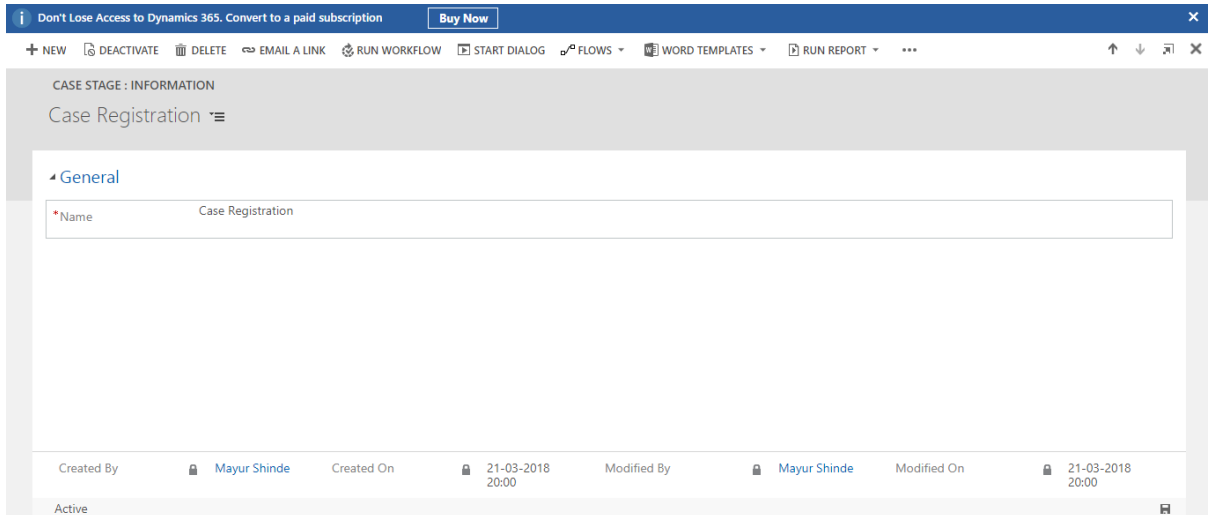
 At the bottom, there is a metadata section showing:

- Created By: Mayur Shinde
- Created On: 23-03-2018 11:47
- Modified By: Mayur Shinde
- Modified On: 23-03-2018 11:47
- Active: (checkbox)

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.



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+ NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG FLOWS WORD TEMPLATES RUN REPORT


CASE STAGE : INFORMATION
Case Registration

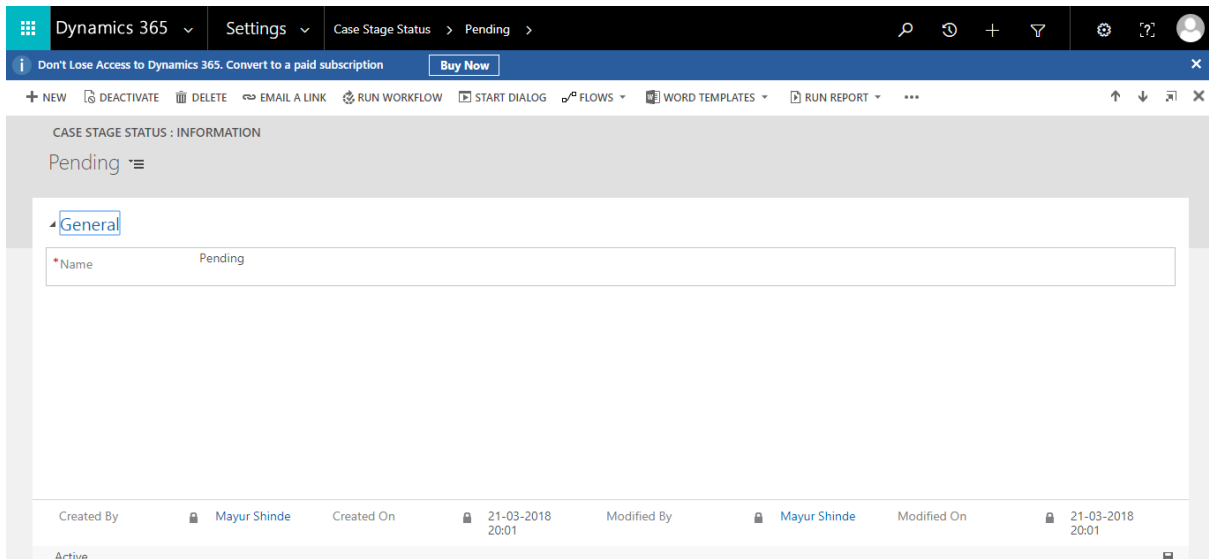
General

*Name Case Registration

Created By Mayur Shinde Created On 21-03-2018 20:00 Modified By Mayur Shinde Modified On 21-03-2018 20:00

Active

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 Settings Case Stage Status Pending

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+ NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG FLOWS WORD TEMPLATES RUN REPORT

CASE STAGE STATUS : INFORMATION
Pending

General


*Name Pending

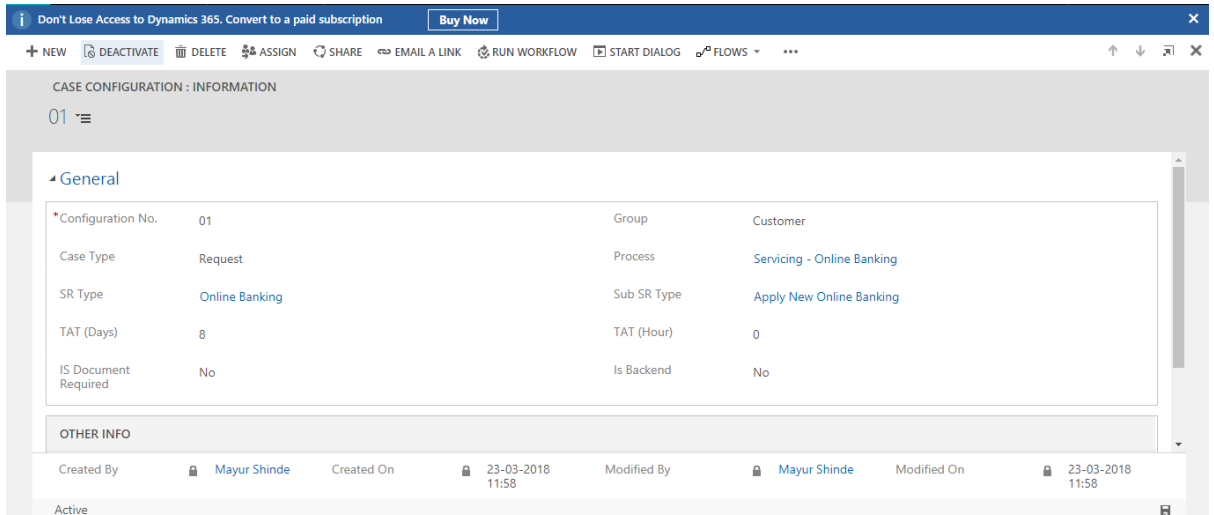
Created By Mayur Shinde Created On 21-03-2018 20:01 Modified By Mayur Shinde Modified On 21-03-2018 20:01

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.



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+ NEW DEACTIVATE DELETE ASSIGN SHARE EMAIL A LINK RUN WORKFLOW START DIALOG FLOWS





CASE CONFIGURATION : INFORMATION

01

General

Configuration No.	01	Group	Customer
Case Type	Request	Process	Servicing - Online Banking
SR Type	Online Banking	Sub SR Type	Apply New Online Banking
TAT (Days)	8	TAT (Hour)	0
IS Document Required	No	Is Backend	No

OTHER INFO


Created By	 Mayur Shinde	Created On	 23-03-2018 11:58	Modified By	 Mayur Shinde	Modified On	 23-03-2018 11:58
Active							

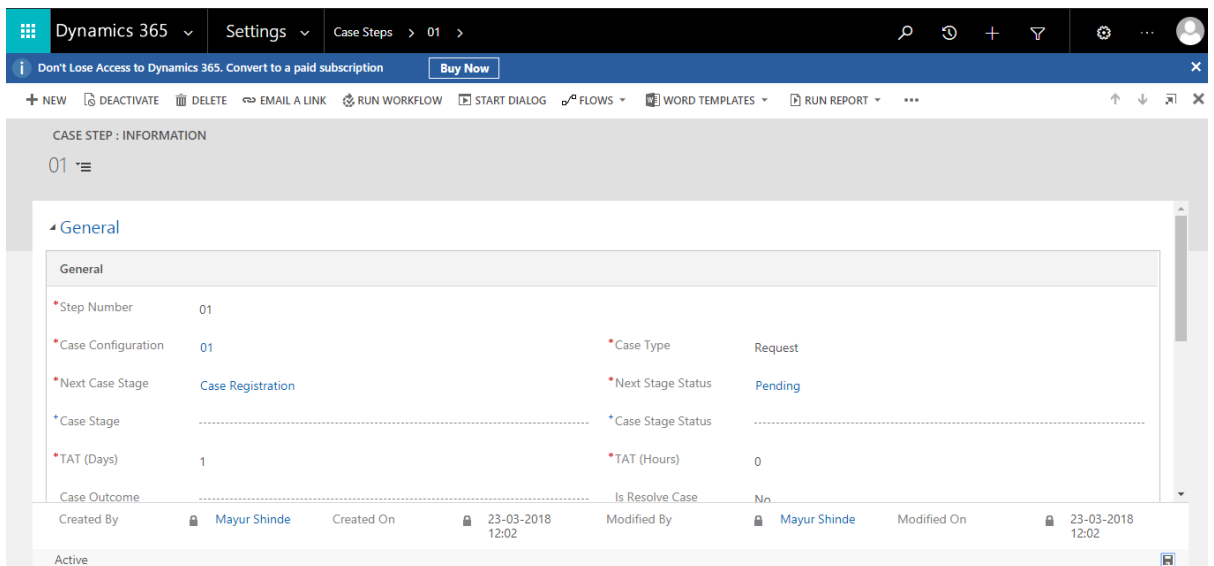
2. Enter case configuration no. which is running sequence no.
3. Select Service Requests Group. i.e. Customer or Advisor
4. Select Service Request type i.e. Request, Complaint etc.
5. Select Process, SR Type, Sub SR Type.
6. Enter the Turnaround time /SLA required to resolve this service request in days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

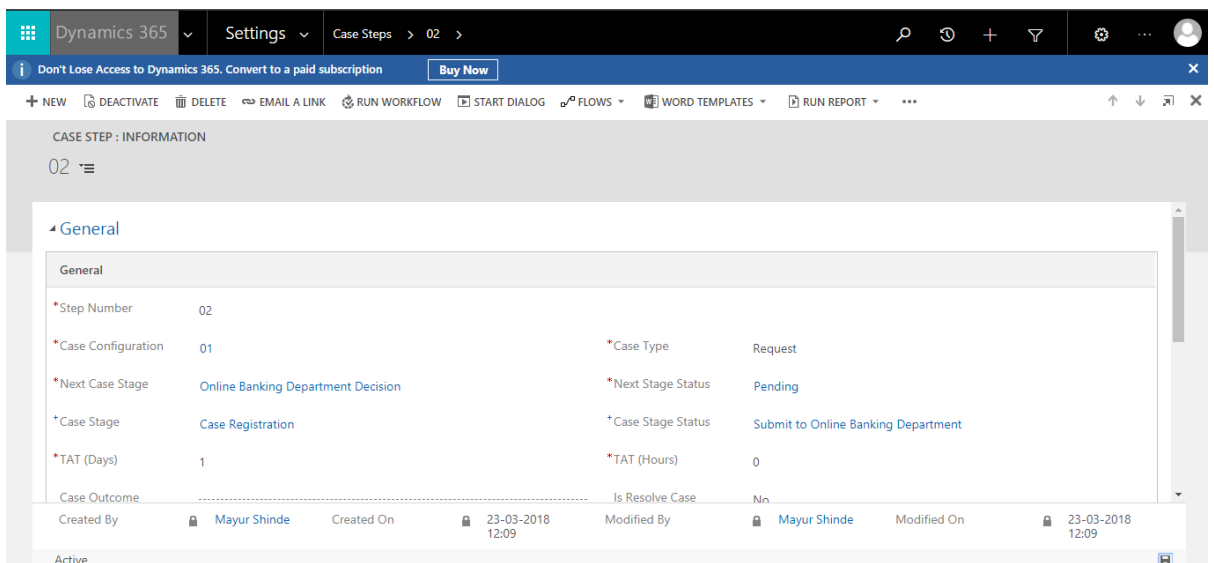


The screenshot shows the Dynamics 365 interface for configuring a Case Step. The breadcrumb trail is "Dynamics 365 > Settings > Case Steps > 01". The page title is "CASE STEP : INFORMATION" with a sub-header "01". The "General" tab is selected, showing the following fields:

*Step Number	01	*Case Type	Request
*Case Configuration	01	*Next Stage Status	Pending
*Next Case Stage	Case Registration	*Case Stage Status	
*Case Stage		*TAT (Hours)	0
*TAT (Days)	1	Is Resolve Case	No
Case Outcome		Created By	Mayur Shinde
		Created On	23-03-2018 12:02
		Modified By	Mayur Shinde
		Modified On	23-03-2018 12:02

The status at the bottom is "Active".

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



The screenshot shows the Dynamics 365 interface for configuring a Case Step. The breadcrumb trail is "Dynamics 365 > Settings > Case Steps > 02". The page title is "CASE STEP : INFORMATION" with a sub-header "02". The "General" tab is selected, showing the following fields:

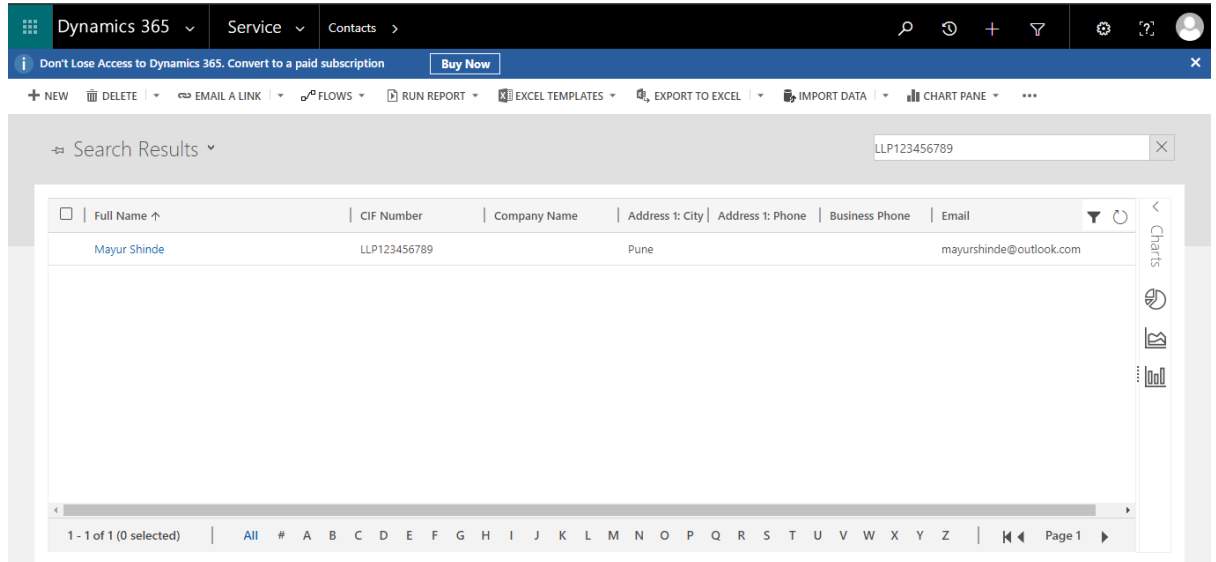
*Step Number	02	*Case Type	Request
*Case Configuration	01	*Next Stage Status	Pending
*Next Case Stage	Online Banking Department Decision	*Case Stage Status	Submit to Online Banking Department
*Case Stage	Case Registration	*TAT (Hours)	0
*TAT (Days)	1	Is Resolve Case	No
Case Outcome		Created By	Mayur Shinde
		Created On	23-03-2018 12:09
		Modified By	Mayur Shinde
		Modified On	23-03-2018 12:09

The status at the bottom is "Active".

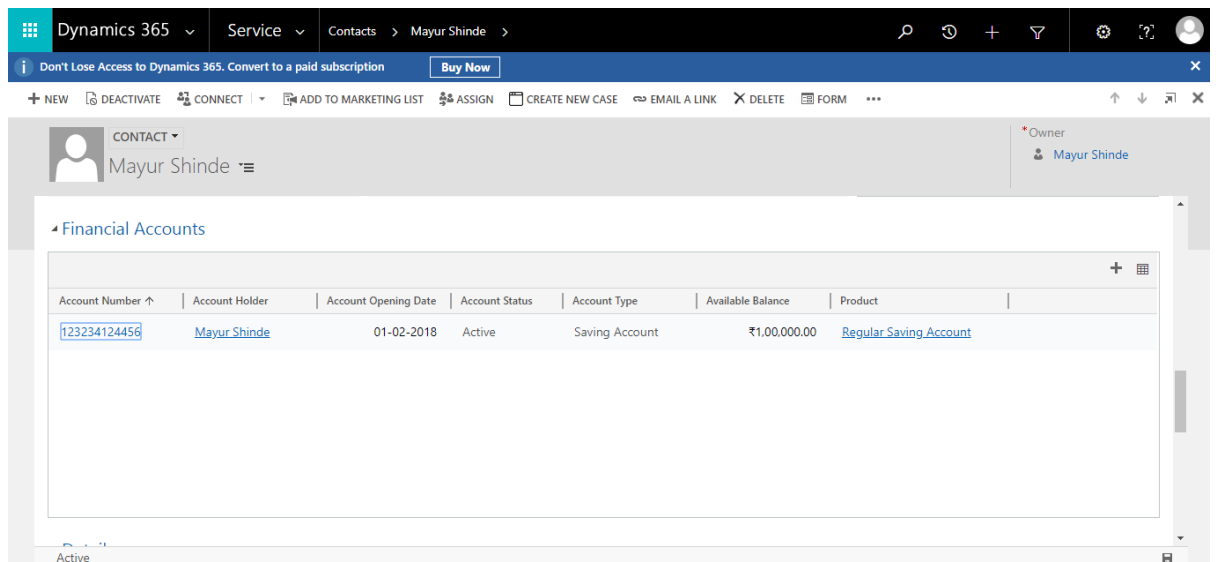
4. In **New Case Step**, enter the applicable details for the step. * denotes mandatory.
5. Step Number is running sequence number.
6. Select Case stage and Case Stage Status.
7. Based selected case stage enter next stage to be moved in current case stage field.
8. Enter standard TAT/SLA required to 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

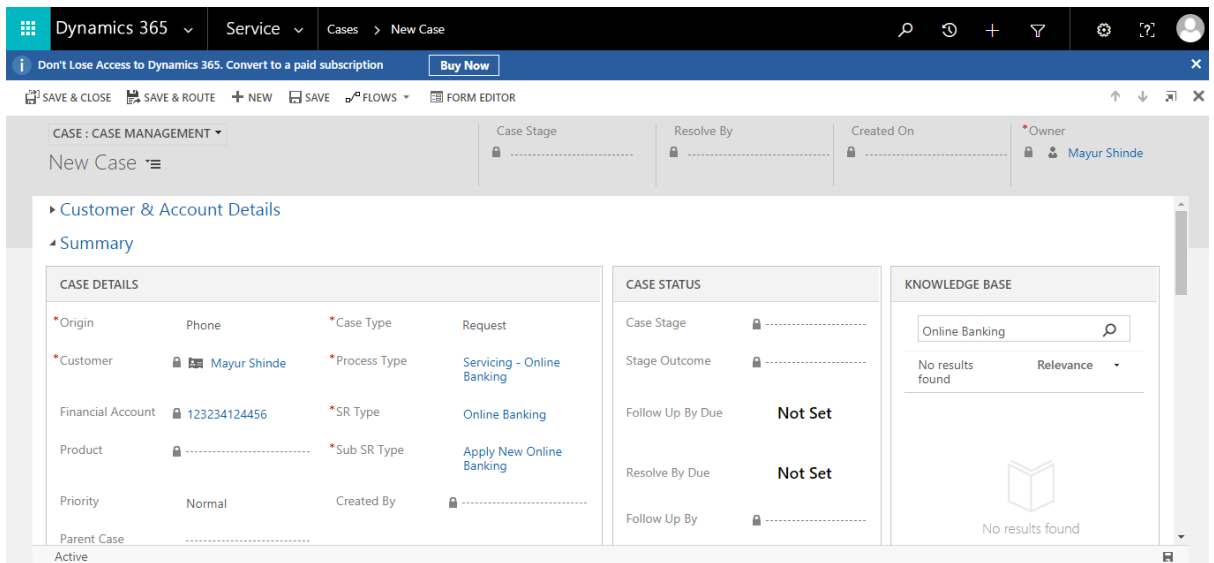
1. To Create New Case, go to **Service -> Contacts-> Search contact by CIF Number** and click on **customer name** to Open that contact.



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

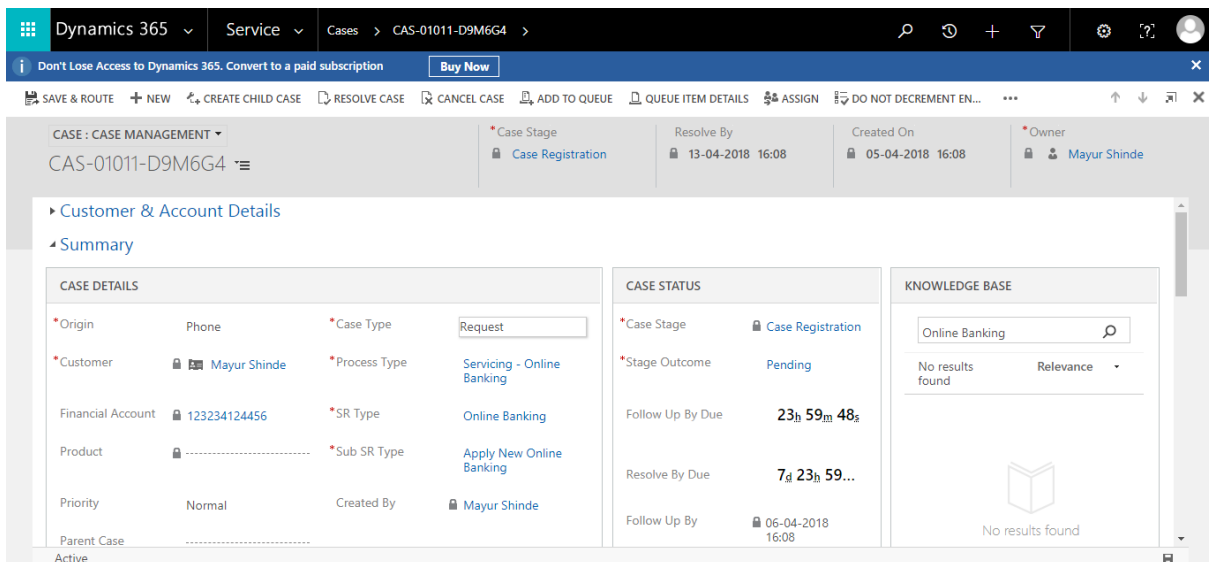


3. In **New Case**, enter the applicable details for the **SR**. * denotes mandatory.



The screenshot shows the 'New Case' form in Dynamics 365. The top navigation bar includes 'Dynamics 365', 'Service', and 'Cases > New Case'. A banner at the top says 'Don't Lose Access to Dynamics 365. Convert to a paid subscription' with a 'Buy Now' button. Below the banner are tabs for 'SAVE & CLOSE', 'SAVE & ROUTE', 'NEW', 'SAVE', 'FLOWS', and 'FORM EDITOR'. The main form area is titled 'CASE : CASE MANAGEMENT' and 'New Case'. It includes fields for 'Case Stage', 'Resolve By', 'Created On', and 'Owner' (Mayur Shinde). The 'Customer & Account Details' section is expanded, showing a 'Summary' tab. The 'CASE DETAILS' section contains fields for 'Origin' (Phone), 'Case Type' (Request), 'Customer' (Mayur Shinde), 'Process Type' (Servicing - Online Banking), 'Financial Account' (123234124456), 'SR Type' (Online Banking), 'Product' (Apply New Online Banking), 'Priority' (Normal), 'Sub SR Type', 'Created By', and 'Parent Case' (Active). The 'CASE STATUS' section shows 'Case Stage', 'Stage Outcome', 'Follow Up By Due' (Not Set), 'Resolve By Due' (Not Set), and 'Follow Up By'. The 'KNOWLEDGE BASE' section shows a search for 'Online Banking' with 'No results found'.

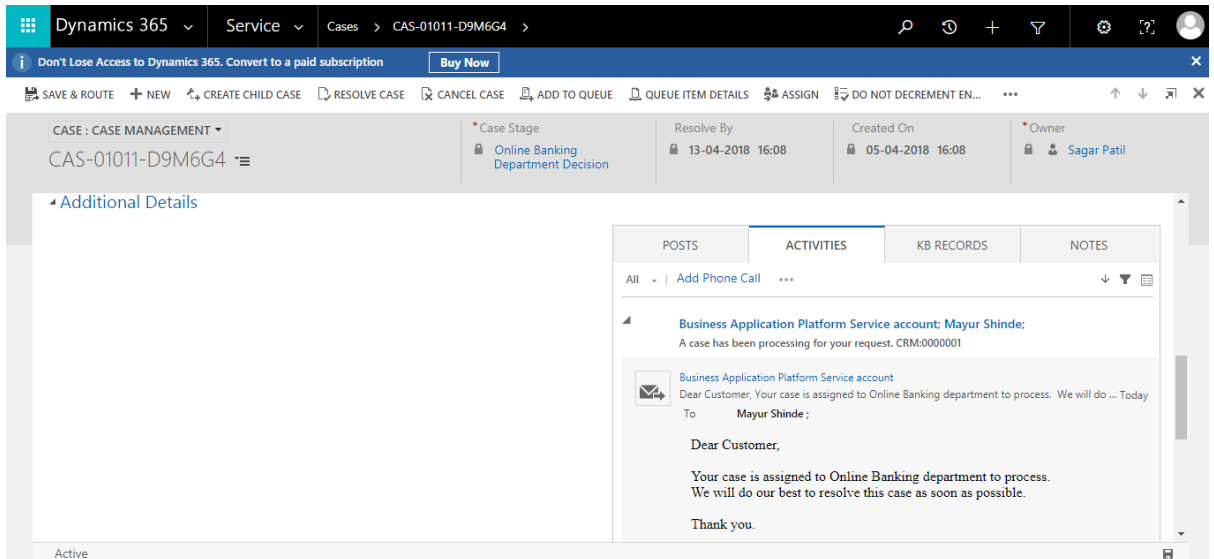
4. Enter mandatory fields like Case Type, Process Type, SR Type, Sub SR Type, Problem Description and Click on **Save**.
5. As soon as case gets save TAT/SLA for Stage and TAT/SLA for SR will be calculated automatically as per defined in configuration and in case status section you able to see count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



The screenshot shows the 'Case' form in Dynamics 365 for case ID 'CAS-01011-D9M6G4'. The top navigation bar includes 'Dynamics 365', 'Service', and 'Cases > CAS-01011-D9M6G4'. A banner at the top says 'Don't Lose Access to Dynamics 365. Convert to a paid subscription' with a 'Buy Now' button. Below the banner are tabs for 'SAVE & ROUTE', 'NEW', 'CREATE CHILD CASE', 'RESOLVE CASE', 'CANCEL CASE', 'ADD TO QUEUE', 'QUEUE ITEM DETAILS', 'ASSIGN', 'DO NOT DECREMENT EN...', and '...'. The main form area is titled 'CASE : CASE MANAGEMENT' and 'CAS-01011-D9M6G4'. It includes fields for 'Case Stage' (Case Registration), 'Resolve By' (13-04-2018 16:08), 'Created On' (05-04-2018 16:08), and 'Owner' (Mayur Shinde). The 'Customer & Account Details' section is expanded, showing a 'Summary' tab. The 'CASE DETAILS' section contains fields for 'Origin' (Phone), 'Case Type' (Request), 'Customer' (Mayur Shinde), 'Process Type' (Servicing - Online Banking), 'Financial Account' (123234124456), 'SR Type' (Online Banking), 'Product' (Apply New Online Banking), 'Priority' (Normal), 'Sub SR Type', 'Created By' (Mayur Shinde), and 'Parent Case' (Active). The 'CASE STATUS' section shows 'Case Stage' (Case Registration), 'Stage Outcome' (Pending), 'Follow Up By Due' (23h 59m 48s), 'Resolve By Due' (7d 23h 59...), and 'Follow Up By' (06-04-2018 16:08). The 'KNOWLEDGE BASE' section shows a search for 'Online Banking' with 'No results found'.

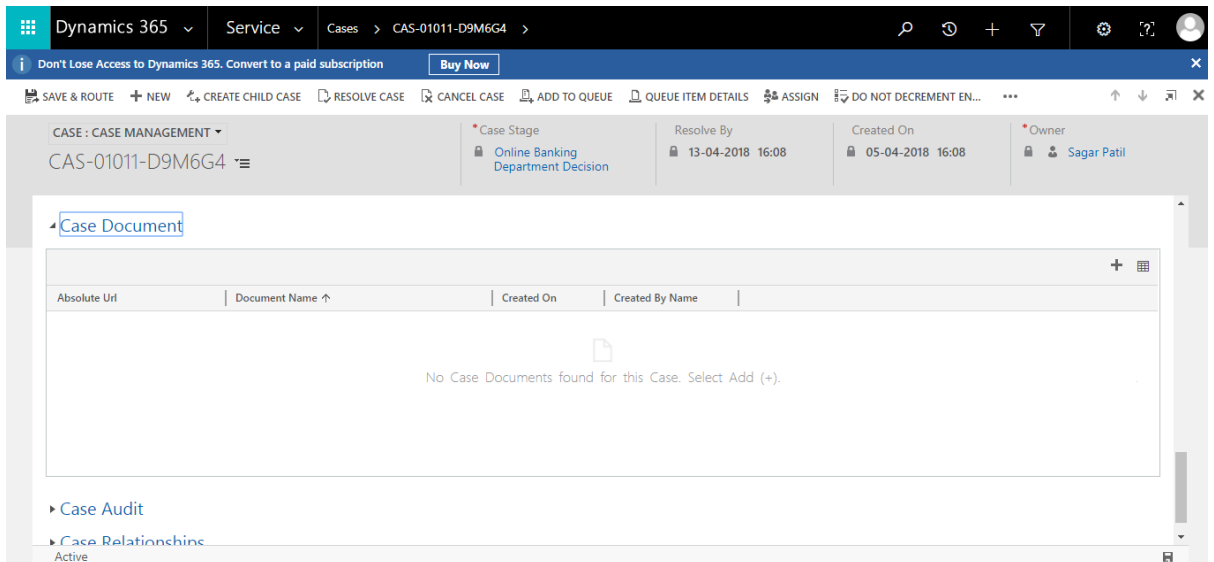
6. Also, case form will show all available (configured) knowledge base available for service request.
7. As per CRM standard a unique id (ticket number) will get generated for case. for generating unique id as per your business standard use **Pragma Auto Number** solution which is available on **Microsoft 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**.



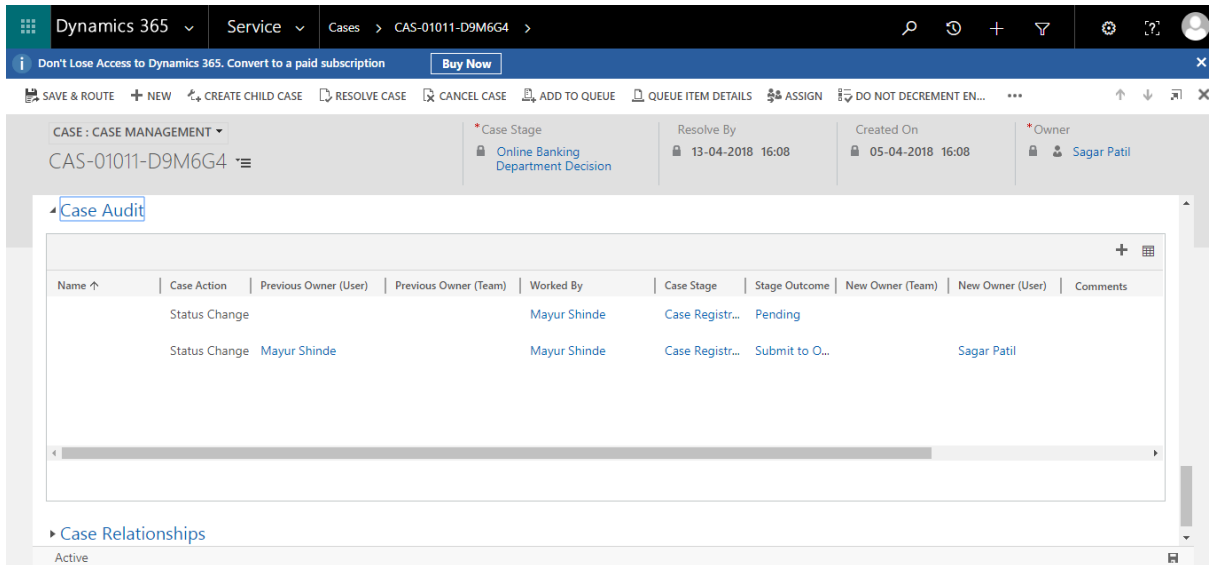
The screenshot shows the Dynamics 365 Case Management interface for case CAS-01011-D9M6G4. The 'Additional Details' tab is selected, displaying a list of activities. The first activity is a 'Business Application Platform Service account: Mayur Shinde' with a description: 'A case has been processing for your request. CRM:0000001'. Below this is a message from the 'Business Application Platform Service account' to 'Mayur Shinde', dated 'Today'. The message content is: 'Dear Customer, Your case is assigned to Online Banking department to process. We will do ... Today To Mayur Shinde; Dear Customer, Your case is assigned to Online Banking department to process. We will do our best to resolve this case as soon as possible. Thank you.'

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



The screenshot shows the Dynamics 365 Case Management interface for case CAS-01011-D9M6G4. The 'Case Document' tab is selected, displaying a table with columns: 'Absolute Url', 'Document Name', 'Created On', and 'Created By Name'. The table is empty, and a message states: 'No Case Documents found for this Case. Select Add (+)'. Below the table, there are links for 'Case Audit' and 'Case Relationship'.

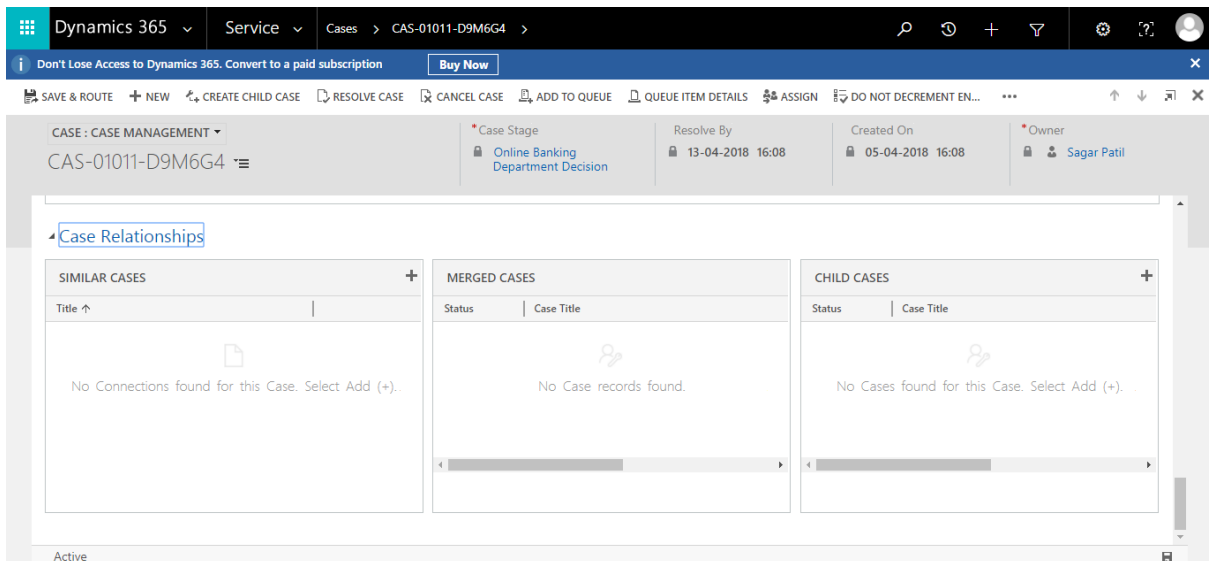
11. To view Audit, click on tab **Case Audit**.



The screenshot shows the Dynamics 365 interface for Case Management. The top navigation bar includes 'Dynamics 365', 'Service', and 'Cases > CAS-01011-D9M6G4'. A banner at the top reads 'Don't Lose Access to Dynamics 365. Convert to a paid subscription' with a 'Buy Now' button. Below the banner, a toolbar contains actions like 'SAVE & ROUTE', 'NEW', 'CREATE CHILD CASE', 'RESOLVE CASE', 'CANCEL CASE', 'ADD TO QUEUE', 'QUEUE ITEM DETAILS', 'ASSIGN', and 'DO NOT DECREMENT EN...'. The main header area displays case details: 'CASE : CASE MANAGEMENT', 'CAS-01011-D9M6G4', 'Case Stage: Online Banking Department Decision', 'Resolve By: 13-04-2018 16:08', 'Created On: 05-04-2018 16:08', and 'Owner: Sagar Patil'. The 'Case Audit' tab is selected, showing a table with columns: Name, Case Action, Previous Owner (User), Previous Owner (Team), Worked By, Case Stage, Stage Outcome, New Owner (Team), New Owner (User), and Comments. The table contains two rows of audit data. Below the table is a 'Case Relationships' section with an 'Active' status.

Name	Case Action	Previous Owner (User)	Previous Owner (Team)	Worked By	Case Stage	Stage Outcome	New Owner (Team)	New Owner (User)	Comments
	Status Change			Mayur Shinde	Case Registr...	Pending			
	Status Change	Mayur Shinde		Mayur Shinde	Case Registr...	Submit to O...		Sagar Patil	

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



The screenshot shows the Dynamics 365 interface for Case Management, similar to the previous one. The 'Case Relationships' tab is selected, displaying three panels: 'SIMILAR CASES', 'MERGED CASES', and 'CHILD CASES'. Each panel has a table with columns 'Status' and 'Case Title'. All three panels show 'No Connections found for this Case. Select Add (+).', 'No Case records found.', and 'No Cases found for this Case. Select Add (+).' respectively. The 'Active' status is shown at the bottom.

4. Conclusion

Thus, PragmaBanco modules enables the below key factors:

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