

Pragma Investment

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1. Introduction

Ready to Deploy Master Data Driven Customer Service Workflow Automation Solution

- In this era of financial investment world, it's not just get more and more the investors in operational business but the financial organization are deciding for 'Identify pattern of bad investors' and 'Better Customer Handling and Customer satisfaction'. Continuous innovation in investment products, services and processes raise demand for rapid changes in customer investment service flows further increasing the challenges faced by investment organizations. **Pragmasys** offers a configurable Customer Service Workflow Automation Solution which transfers the control of setting up the support process flows from developers to business users. It provides comprehensive Investment case management capabilities including ability to define multiple flows based on different criteria, multistep 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 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 Case Management Dashboards.

How does it Benefit an Organization?

- Pragmasys Customer Service Workflow Automation solution routes the 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 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.
- This also helps in providing consistent user experience across business lines thus improving the user adoption.

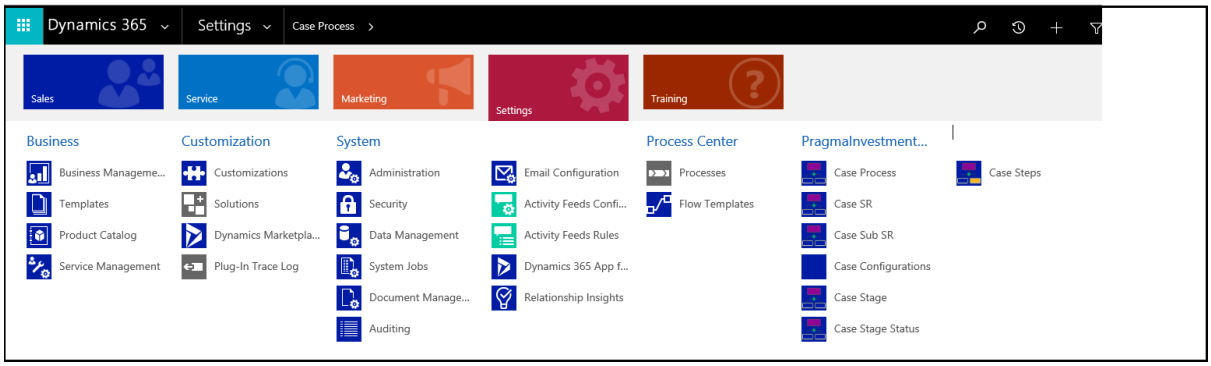
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2.Master Data set up of new service type

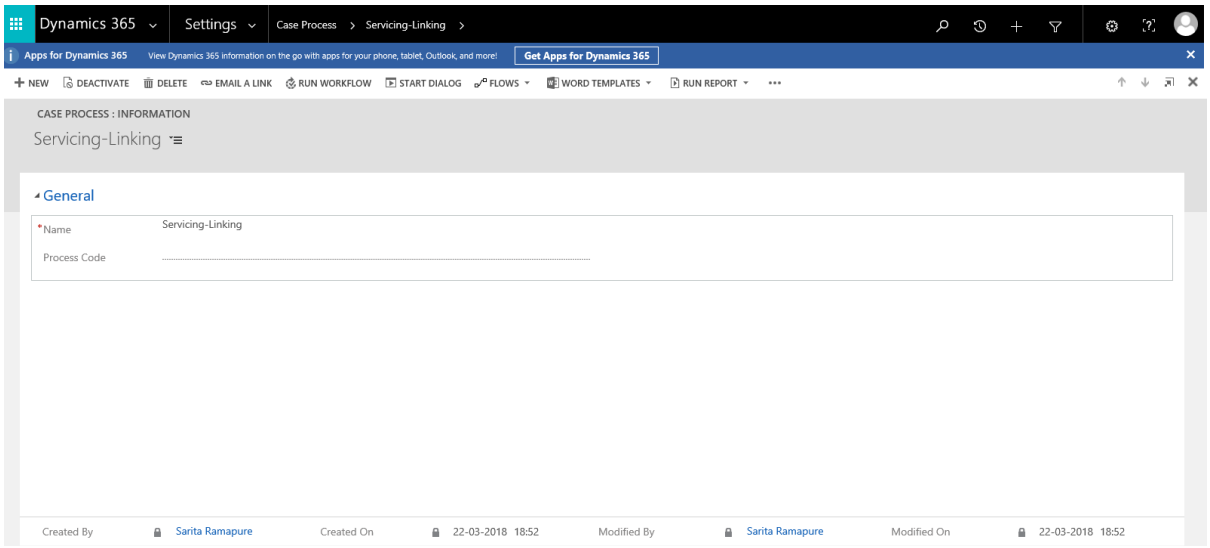
2.1 New Service Type Set up

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 Investment Group** inside **Setting Area.**

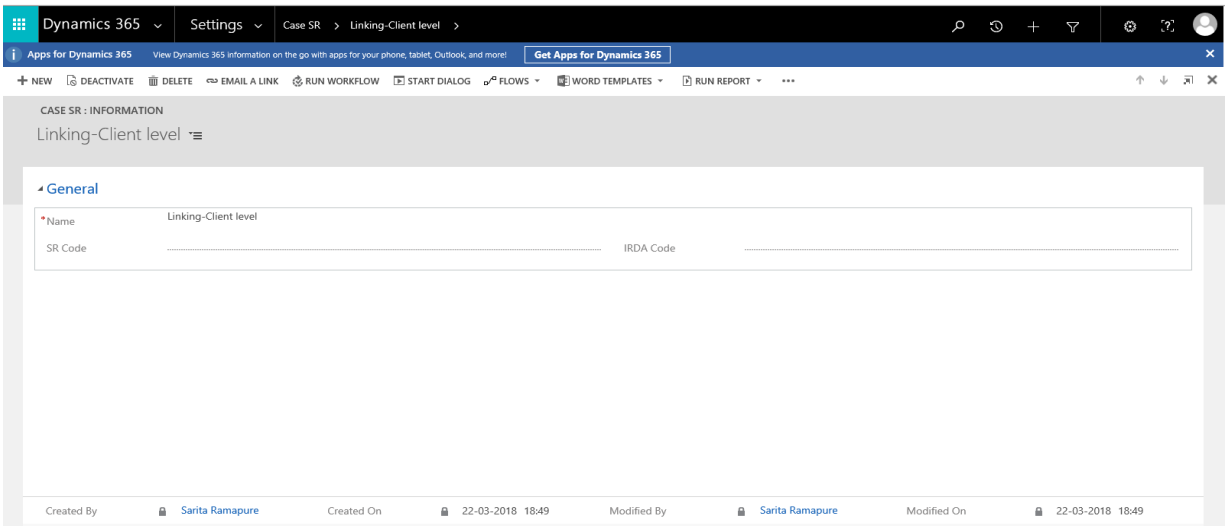


2. Click on Case Process, then Click on New (+) on top left corner, below screen will open. Enter Process name. e.g. Servicing – Linking. In the bottom-right corner of the page, click  to Save Process Name.

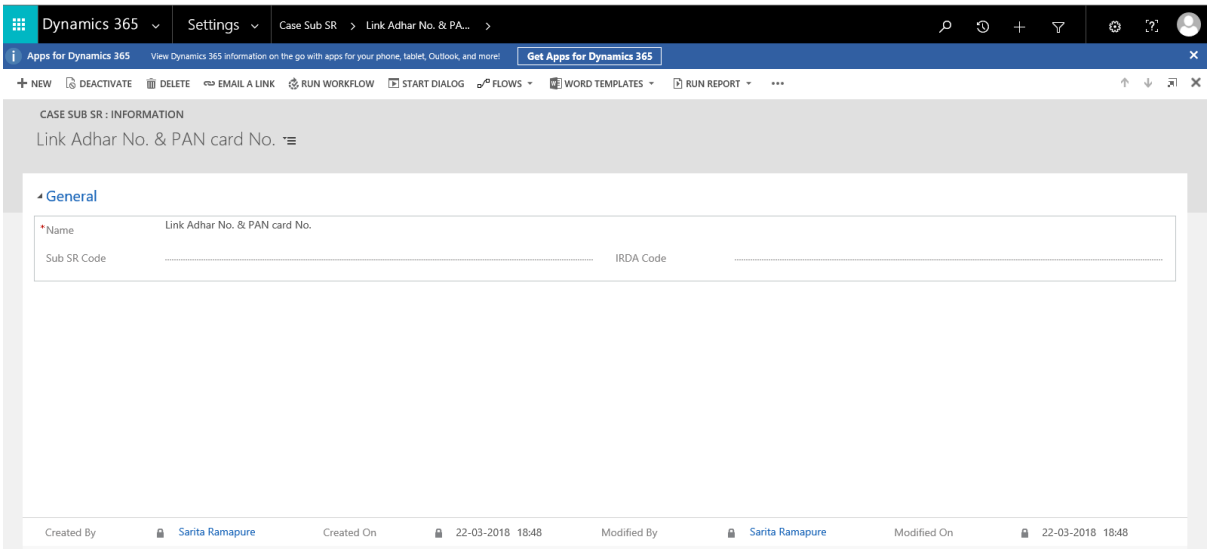


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3. Click on Case SR, then Click on New (+) on top left corner, below screen will open. Enter SR (Service Request) name. e.g. Linking- Client level. In the bottom-right corner of the page, click  to save SR Name.



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. Link Aadhar No. & PAN card No. In the bottom-right corner of the page, click  to save Sub SR name.

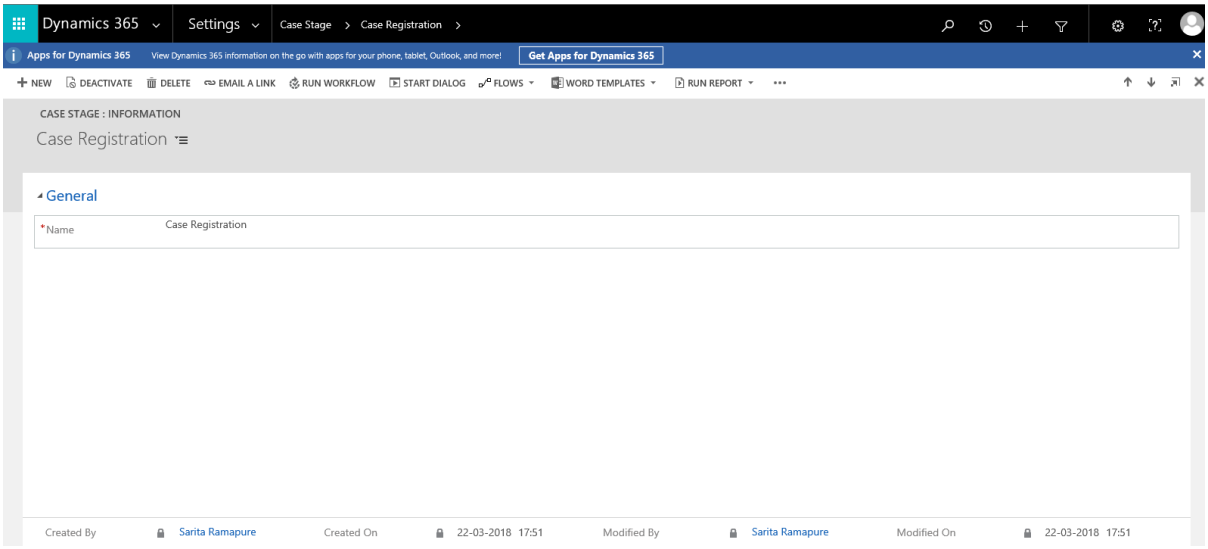


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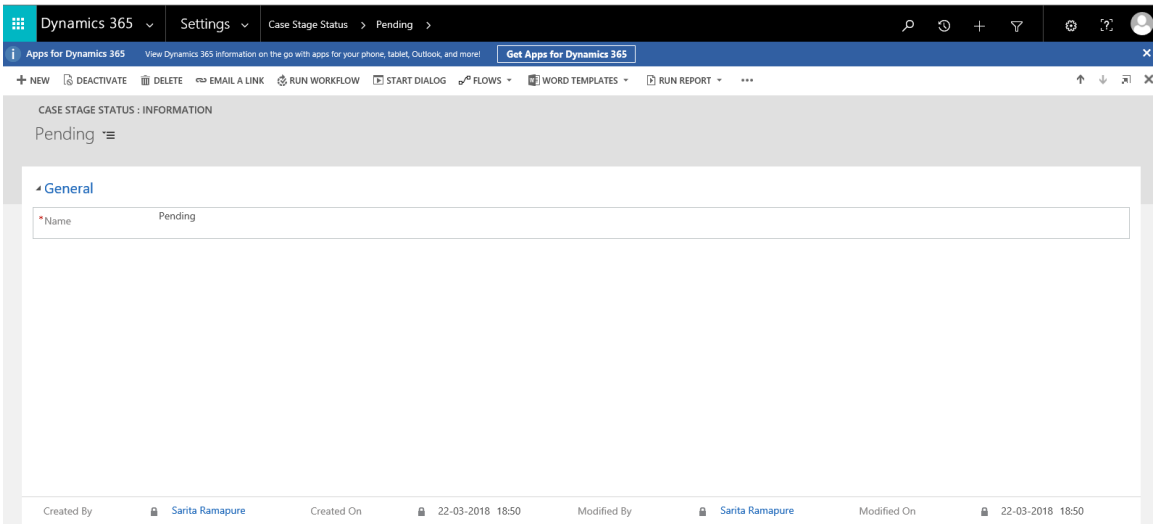
2.2 Stages and Stage Status for flow

To routes the case / 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.

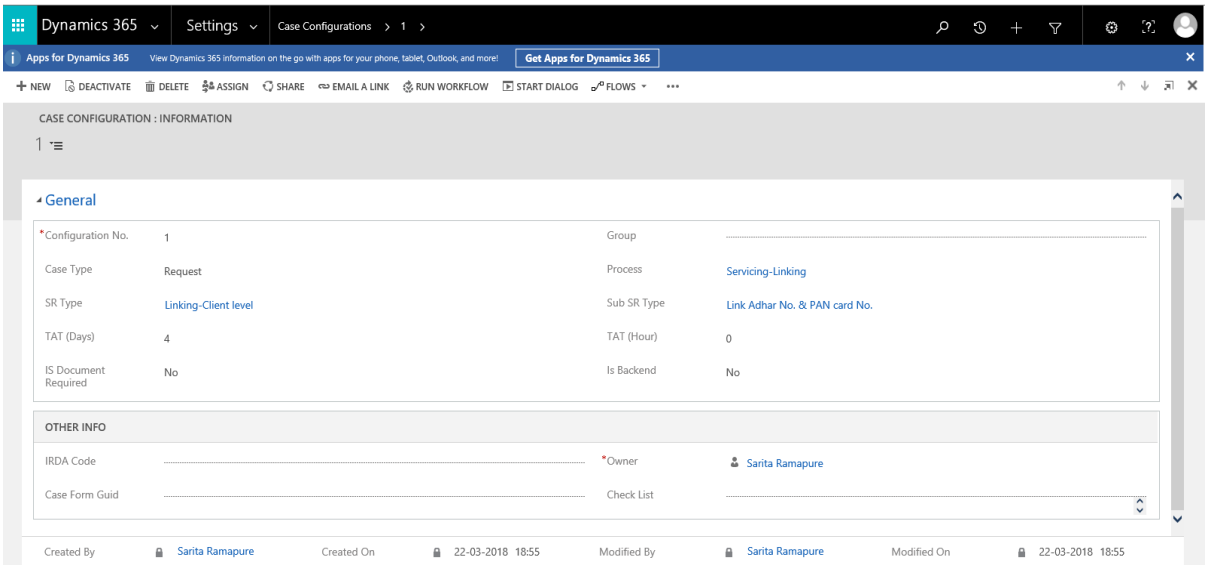


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2.3 Case configuration for new service type

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.

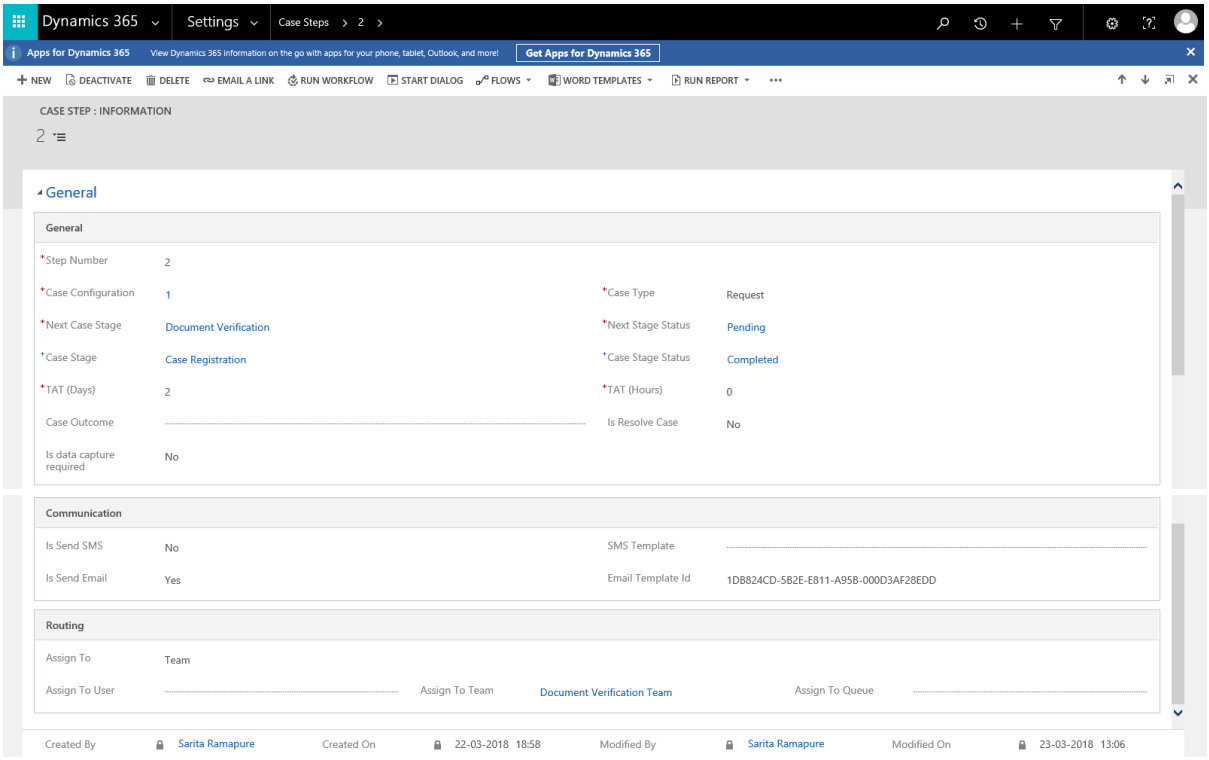
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2.4 Case Steps for new service type (i.e. configuration (assignment, TAT,next step, etc.))

Case step is nothing but steps required to resolve 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.

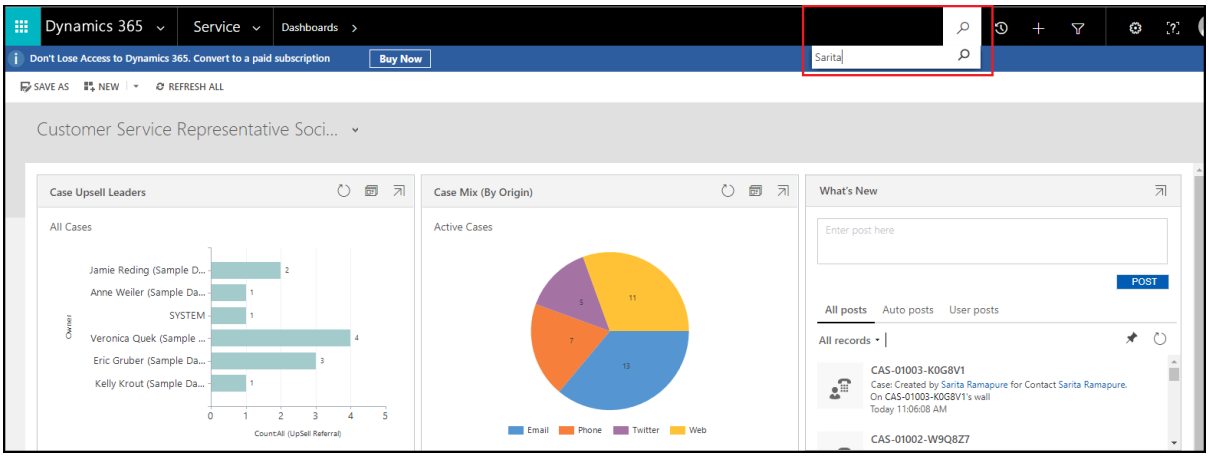


2. In **New Case Step**, enter the applicable details for the step. * denotes mandatory.
3. Step Number is running sequence number.
4. Select Case stage and Case Stage Status.
5. Based selected case stage enter next stage to be moved in current case stage field.
6. Enter standard TAT/SLA required to complete stage.
7. Enter sms/email template which will be triggered on stage change.For eg. We have to send email, then Is Send Email is must be ‘Yes’ & enter guid of email template.
8. Enter User or team to which case will be assigned for further evaluation.For eg. In Routing section Assign To is ‘Team’ & Assign To Team is ‘Document Verification Team’.

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3. Create a Service Request (Case)

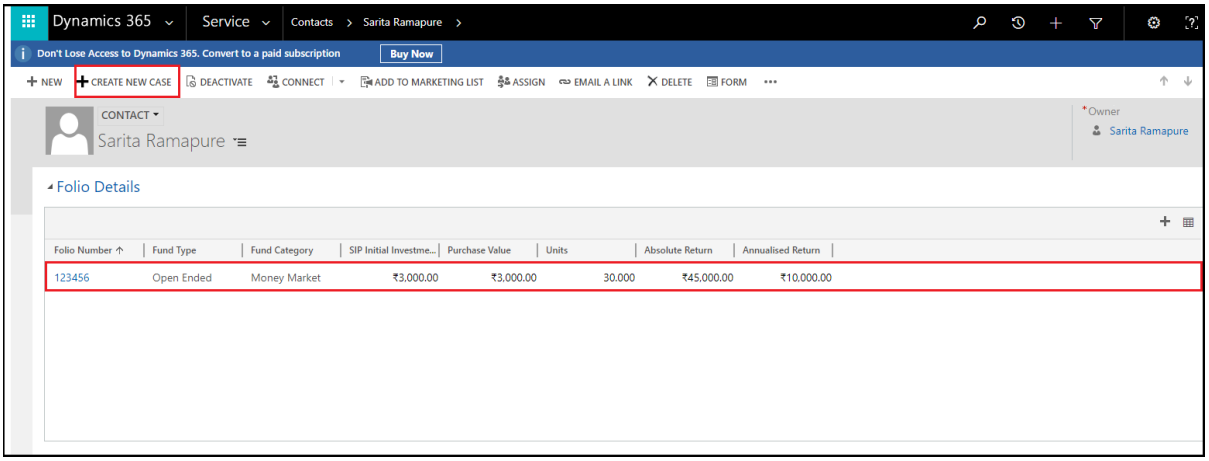
1. Create New Case against particular customer's fund,Enter Customer Name in Search box and click on Search icon.



2. Click on Customer(In Red box).It goes on Customer Details Page.

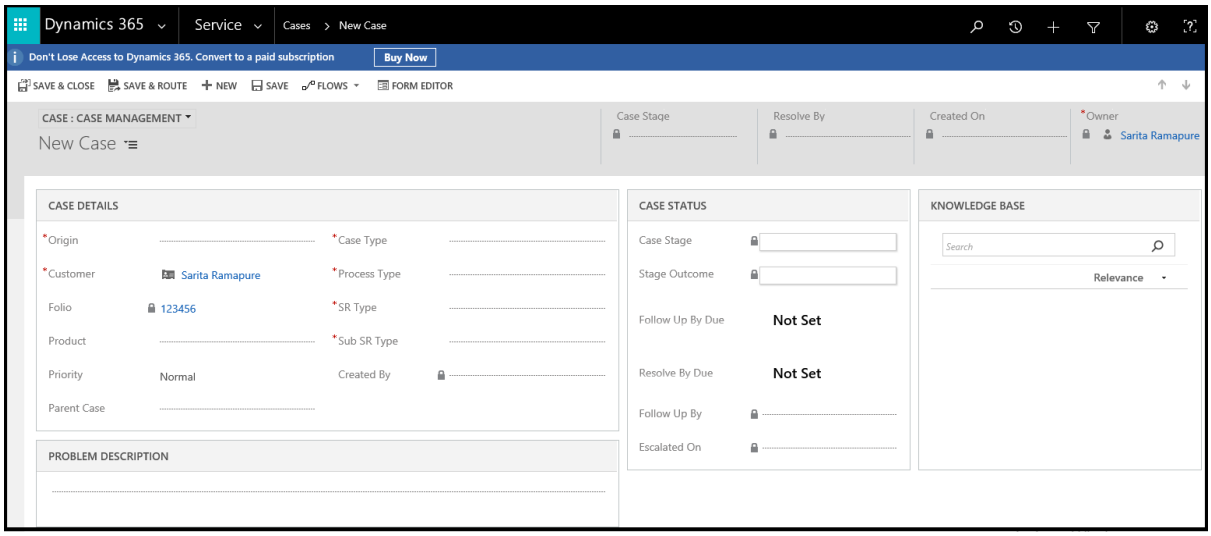


3. To Create New Case against mutual fund, select particular folio from Folio Details tab & click on CREATE NEW CASE button.

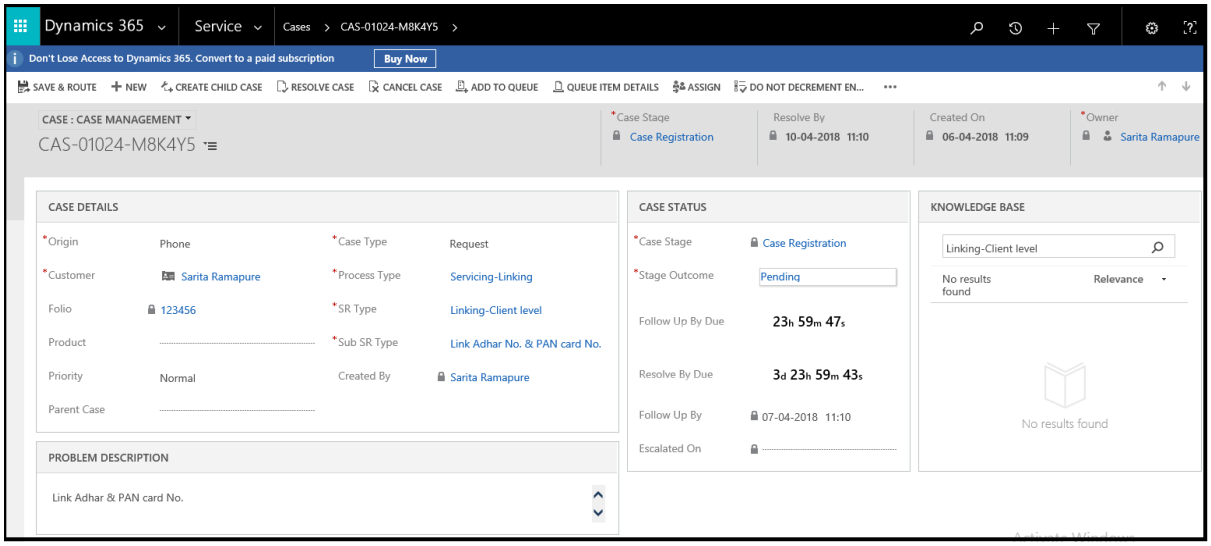


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4. In **New Case**, enter the applicable details for the **SR**.* denotes mandatory.



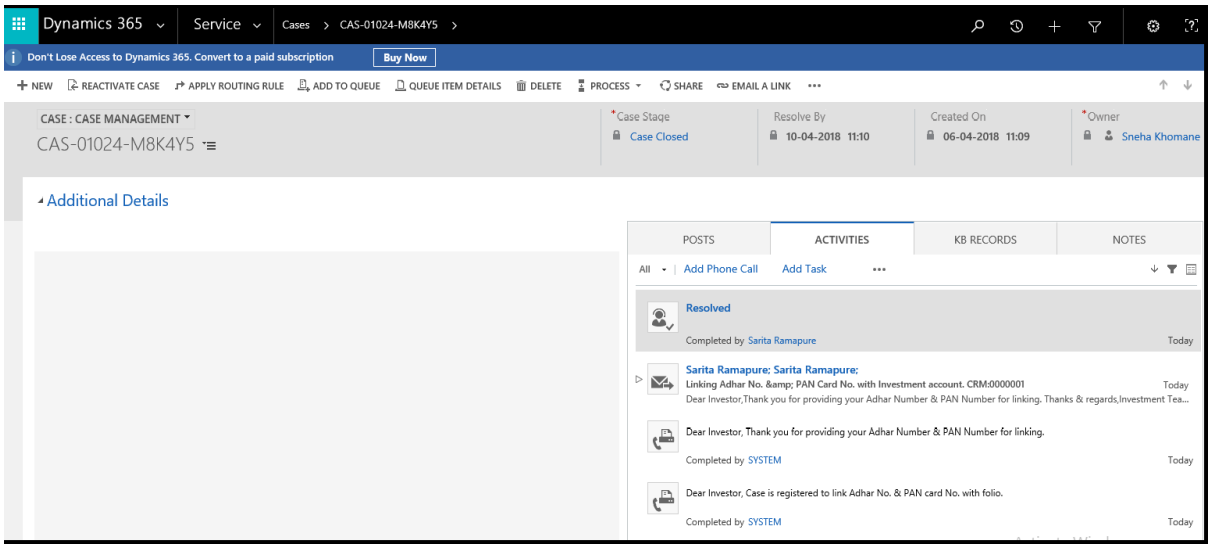
5. Enter mandatory fields like Case Type, Process Type, SR Type, Sub SR Type, Problem Description and Click on **Save**.
6. As soon as case gets save TAT/SLA for Stage and TAT/SLA for SR will be calculated automatically as per defined in configuration and in case status section you able to see count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



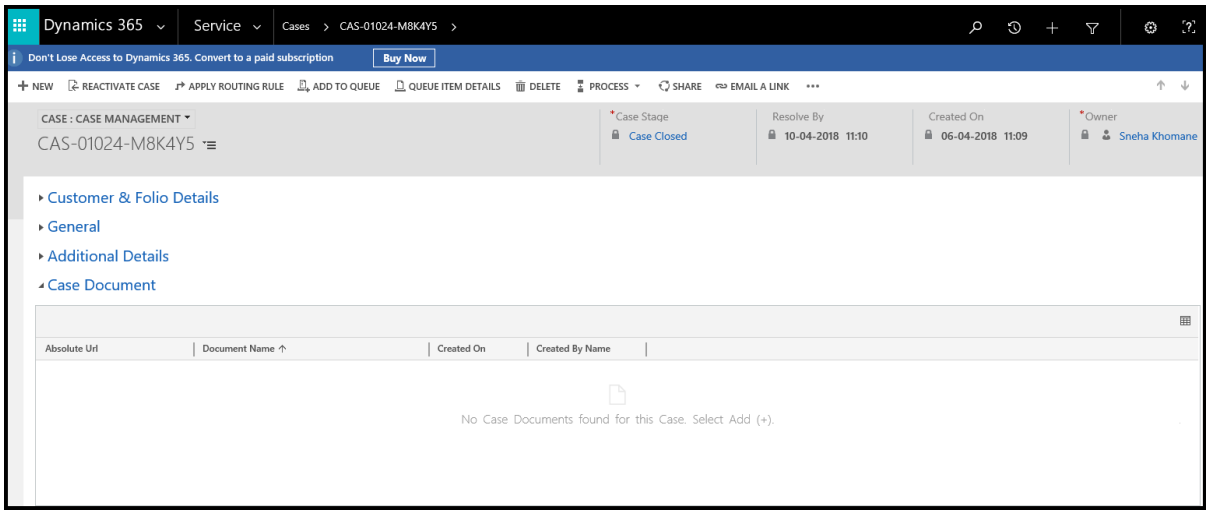
7. Also, case form will show all available (configured) knowledge base available for service request.
8. As per CRM standard a unique id (ticket number) will get generated for case. for generating unique id as per your business standard use **Pragma Auto Number** solution which is available on **Microsoft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

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

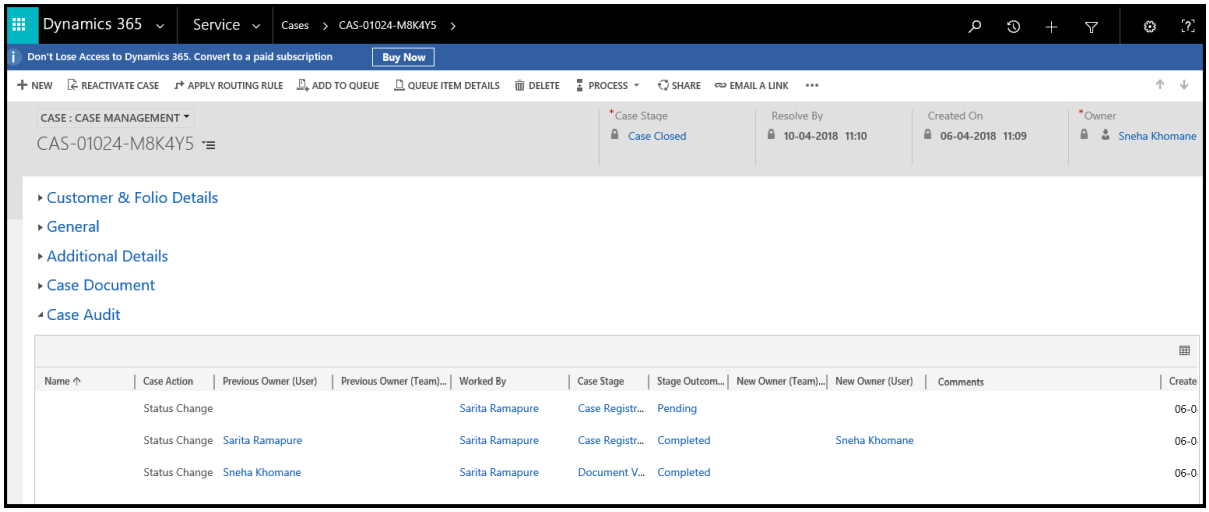


11. To view attached document, click on tab **Case Document**.

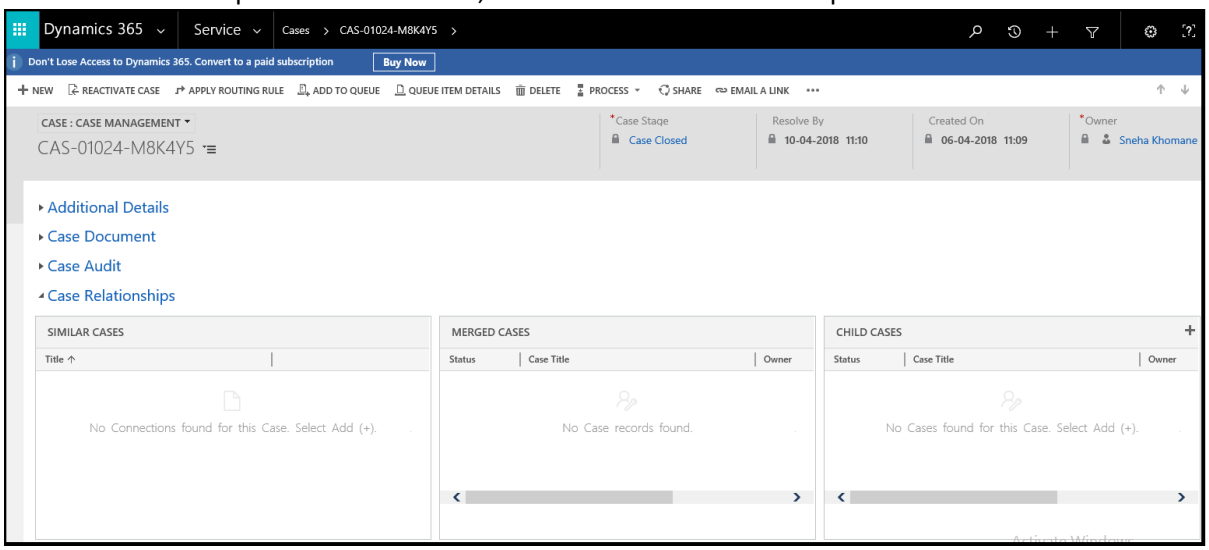


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12. To view Audit, click on tab **Case** Audit.



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



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Conclusion

- This solution enables, define the communication/notification template for internal and external email communication.
- This helps in providing timely update to customer on progress of the Service Request/Complaints .
- This helps in proper routing of Service Request/Complaints as per Team or any Business User.

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