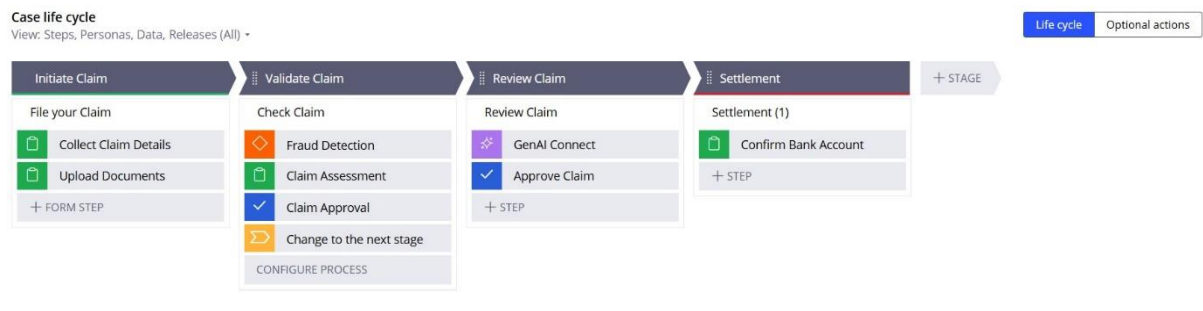


Implementation of Pega GenAI Connect in a real time use case scenario



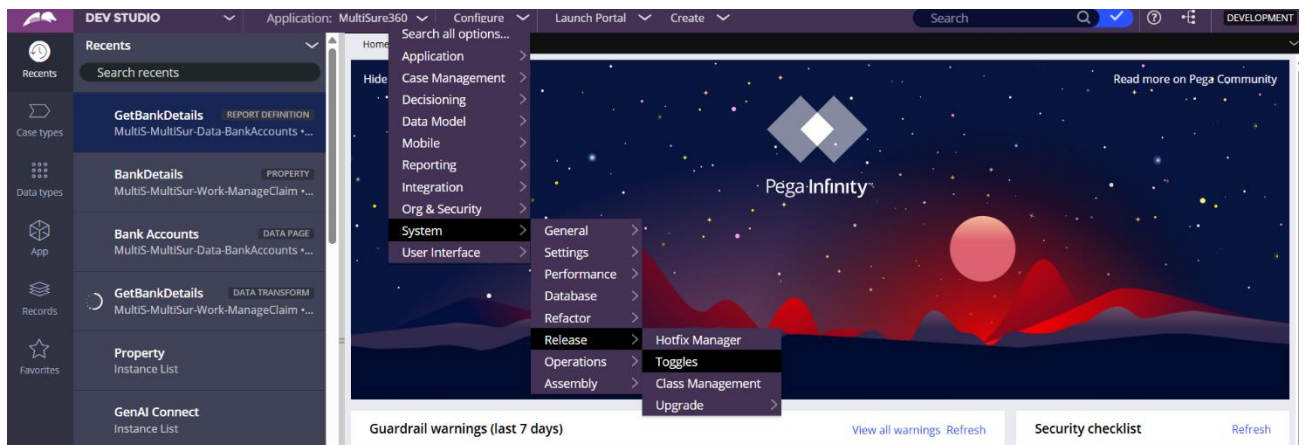
We have the “Manage Claim” application where the customer submits the detailed report of their claim and it will be either assessed by the Customer Service Representative or directly to the Manager approval based on the criteria.

The usage of Pega GenAI Connect comes in the Review Claim stage where the manager reviews the case and here, we will be generating an AI context based on the customer input to analyse the claim even better.

Let’s get into the configuration of GenAI Connect in the case management in a step-by-step procedure.

STEPS TO IMPLEMENT PEGA GENAI CONNECT

1. Open Dev Studio, Click Configure -> System -> Release -> Toggles. This opens "Toggles Management".



2. Check for "EnableGenerativeAI" identifier and click the pencil icon to open that identifier.

Create new toggle

Search Toggles... Search Clear search

App context	Identifier	Additional details	Created by	Status	
PegaRULES	AddFieldReact		andec3	OFF	Open When
PegaRULES	Categories		pinnp	OFF	Open When
PegaRULES	DataExplorerNonQueryableFeatures		admin@reportingauto1	OFF	Open When
PegaRULES	DisableSettingsLandingPage		adusa	ON	Open When
PegaRULES	EnableBiasDetection		Thalluru.TejaLakshmi@pega.com	OFF	Open When
PegaRULES	EnableBigQuery		baczp	OFF	Open When
PegaRULES	EnableBQ_BBKoperation	Enabling Browse by Key operation for Big Query dataset	baczp	OFF	Open When
PegaRULES	EnableBuiltOnAppSelectionForQuality		guntv	ON	Open When
PegaRULES	EnableCustomComponentV2	Custom Components v2, Library Version selection Infra.	parmn	OFF	Open When
PegaRULES	EnableCustomDataAccessForMSGraph		gants1	OFF	Open When
PegaRULES	EnableDataDictionary		sajohn	OFF	Open When
PegaRULES	EnableDataExtraction	Toggle to enable or disable real time extractions for case types and data objects	somuh	OFF	Open When
PegaRULES	EnableExperimentalInsightFeatures		carle	OFF	Open When
PegaRULES	EnableGenAIChatWidgetInExploreData	Enables a conversational "Chat with your Data" experience in the Explore Data landing page. Allows users to have a continuous conversation with the AI.	ramk	OFF	Open When
PegaRULES	EnableGenerativeAI		seguv	ON	Open When
PegaRULES	EnableIdentityFederation	Control to enable Identity Federation feature set.	beers1	OFF	Open When
PegaRULES	EnableInboundSampleFileDataSet	Enables the inbound sample file dataset for machine simulations	sajohn	ON	Open When

3. Enable the toggle in Associated ruleset based on your preference for accessing the Pega GenAI.

Edit toggle



Warning : This is a beta feature that may be changed or completely reversed in future. Please refer to feature documentation for more details.

Application context★

PegaRULES

Toggle identifier

EnableGenerativeAI

Short description

Toggle for enabling Connect-GenerativeAI feature

Additional details

External ID ?

EPIC-83426

Associated ruleset

Pega-ProcessCommander



Enable toggle for all



Only my access group: MultiSure360:Authors



Only myself: e7cs043@sairamtap.edu.in

☒ This toggle has an associated when rule created in:

Development branch

[No branch]

Ruleset

Pega-IntegrationArchitect

Version

08-23-01

Cancel

Submit

4. In the Collect Claim Details steps, I have configured the necessary details along with the Description property as text paragraph. This will be the input property to our Pega GenAI Connect.

Display Conditions Pre/Post Processing

Preview as
Constellation

Claim Details

Policy Number Type of Claim

Date of Incident Claim Amount

Description

Edit View: Create

Template Default form

Layout
1 column

Instructions
Case step instructions

Fields

Collect Claim Details View

+ Add

> Advanced

5. In the Case life cycle, add “GenAI Connect” step inside the automations category.

Search

< **Automations**

Assign to robot queue

Attach content

Change to a stage

Change to next stage

Change to previous stage

Create case

Create PDF

GenAI Connect

Generate document

GenAI Connect

Send your requests to Generative AI tool which will provide a response specific to your prompt.

Last updated on
04/03/2025 04:21 by Pega

Select

6. You can either call your existing GenAI rule created in Dev studio or else choose custom this will create a new GenAI rule.

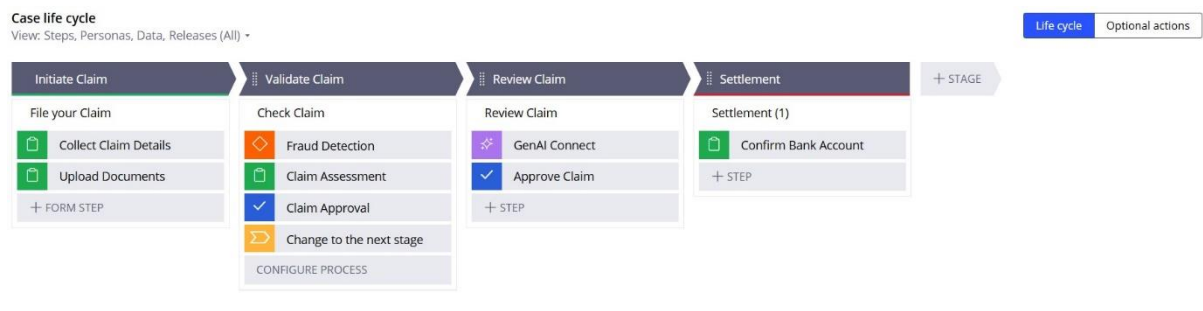
In Request tab, give your necessary prompt based on your need. Here I want to explain the customer's description about the issue to be explained in one or two words for fast processing.

Note: If your prompt involves any property value, then address is as {PropertyName}

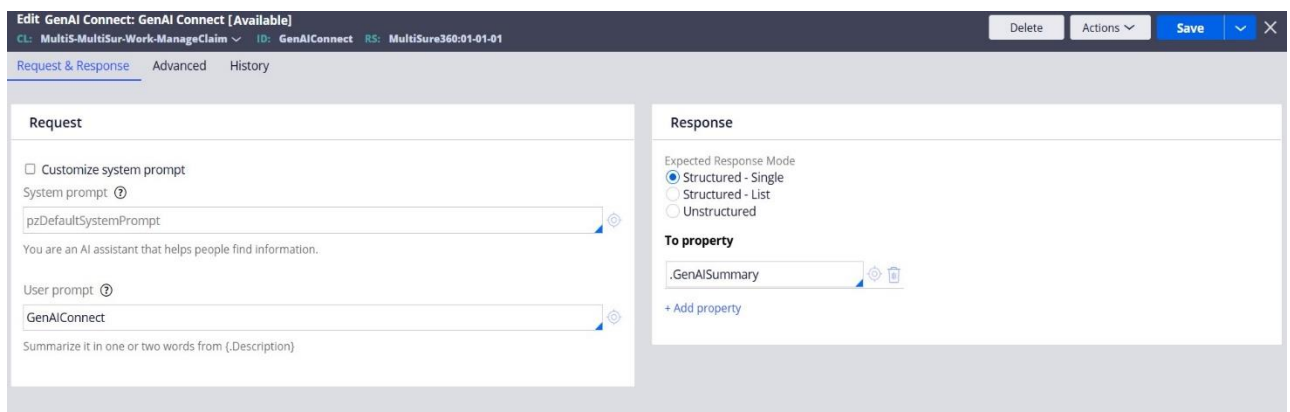
The screenshot shows a 'Step' configuration window with a title bar containing a question mark icon and a close button. Inside the window, there are two radio buttons: 'Custom' (which is selected) and 'Use existing'. Below this, there is a section titled 'Request' with a dropdown arrow. Under 'Request', there is a 'Prompt*' label followed by a text area containing the text 'Summarize it in one or two words from {.Description}'. Below the 'Request' section is a 'Response' section with a right-pointing arrow. At the bottom of the window, there is a link that says 'Open GenAI Connect in Dev Studio' with an external link icon. Below the link is an 'Audit note' label followed by a large empty text area.

7. In the response tab, select your preferred response format in list or single value or unstructured type and you can map the response to a property.

Here I mapped it to a property used in the "Review Claim" stage. Now, we are done.



You can view your GenAI connect rule created in Dev studio and make changes to your future needs.



8. Now, we run the case to see the results. I have provided a detailed description consisting of more than 200 words which might be difficult for the claim reviewer to go through each large paragraphs.

Create Manage Claim (M-2005)

Collect Claim Details

Claim Details

Policy Number

P100147

Type of Claim

Motor Claim

Date of Incident

10/08/2025

Claim Amount

₹50,000.00

Description

On August 10, 2025, the insured vehicle, a 2021 Honda Civic (registration no. AB12 XYZ), was involved in a rear-end collision on Oakwood Avenue, Springfield. The policyholder, Mr. John Smith, reported that while slowing down at a traffic signal, another vehicle failed to brake in time and collided with the rear of his car. The impact caused significant damage to the rear bumper, trunk lid, and tail lights.

The insured vehicle was towed from the scene as it was not drivable due to the trunk being jammed and the rear lights rendered inoperative. No bodily injuries were reported at the time, though the policyholder later visited a medical clinic for precautionary evaluation due to mild neck discomfort.

Police were called to the scene, and a formal accident report was filed under case number SP-2025-0910. The third-party driver admitted fault at the site of the incident. Repair estimates obtained from an authorized Honda service centre indicate costs for replacement of the rear bumper, trunk lid, tail lamp assembly, and repainting, totalling approximately Rs.50,000/-

Cancel

Fill form with AI

Next

9. Using GenAI connect, we have fastened the case processing by giving the short descriptive about the issue which helps the claim reviewer to approve or reject the case easily.

V

Get Approval
Assigned to Vijay • In M-2005 • Urgency 10

Please approve or reject this Manage Claim

Claim Application Form

Policy Number	Type of Claim
P100147	Motor Claim
Date of Incident	Claim Amount
10/08/2025	₹50,000.00

AI-Generated Summary

Rear-end collision involving a 2021 Honda Civic on August 10, 2025, caused by another vehicle. Signific

This field is generated by AI to give short description of the claim

Cancel

Reject

✦ Fill form with AI

Approve