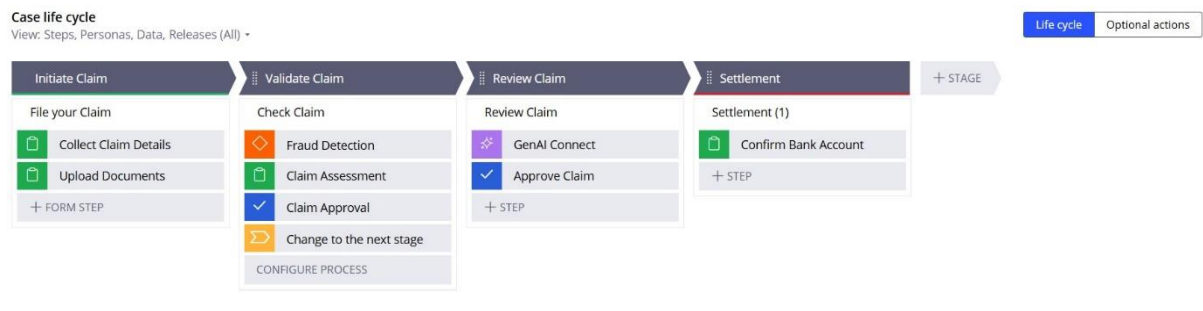# Implementation of Pega GenAI Connect in a real time use case scenario


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.

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STEPS TO IMPLEMENT PEGA GENAI CONNECT

1.Open Dev Studio, Click Configure -> System -> Release -> Toggles. This opens "Toggles Management".
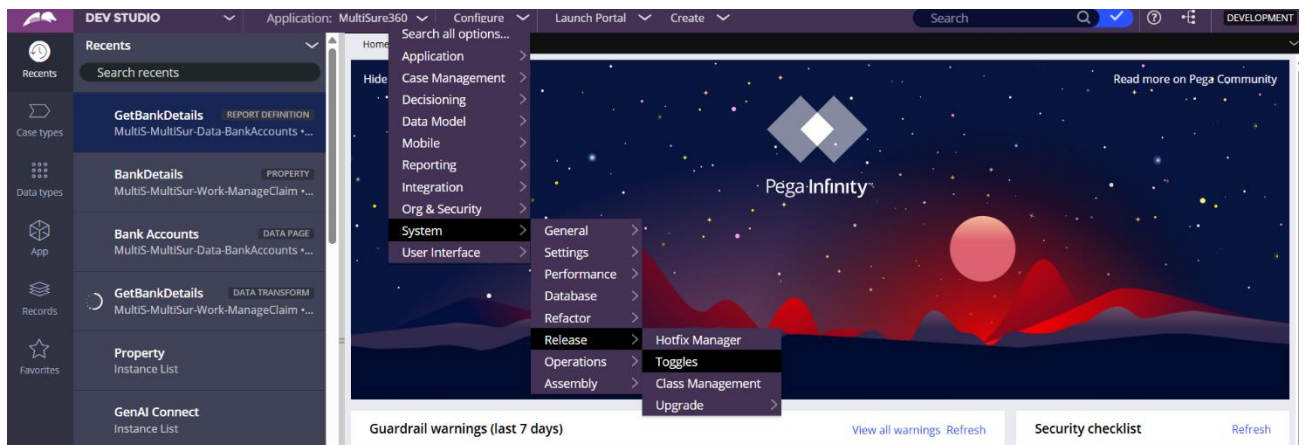
2. Check for "EnableGenerativeAI" identifier and click the pencil icon to open that identifier.

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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	✎
PegaRULES	DataExplorerNonQueryableFeatures		admin@reportingauto1	OFF	Open When ✎
PegaRULES	DisableSettingsLandingPage		adusa	ON	✎
PegaRULES	EnableBiasDetection		Thalluru.TejaLakshmi@pega.com	OFF	✎
PegaRULES	EnableBigQuery		baczp	OFF	✎
PegaRULES	EnableBQ_BBKoperation	Enabling Browse by Key operation for Big Query dataset	baczp	OFF	✎
PegaRULES	EnableBuiltOnAppSelectionForQuality		guntv	ON	✎
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	✎
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 running 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 ⑦
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	Ruleset	Version
[No branch]	Pega-IntegrationArchitect	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.

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

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}

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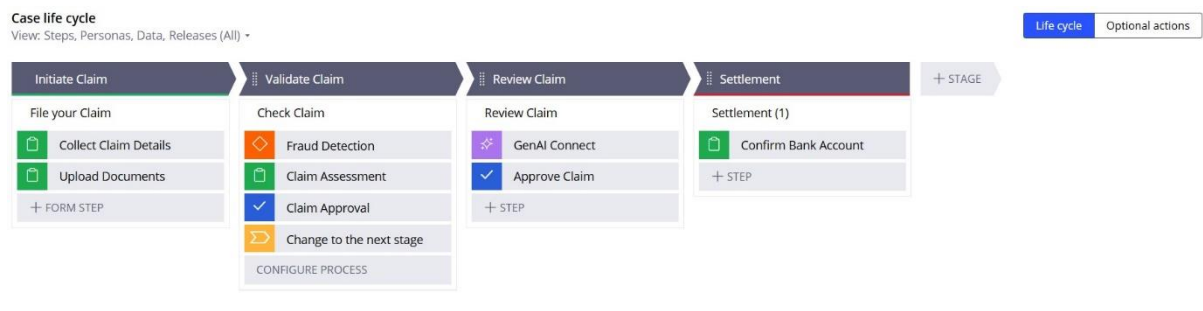
You can view your GenAI connect rule created in Dev studio and make changes to your future needs.

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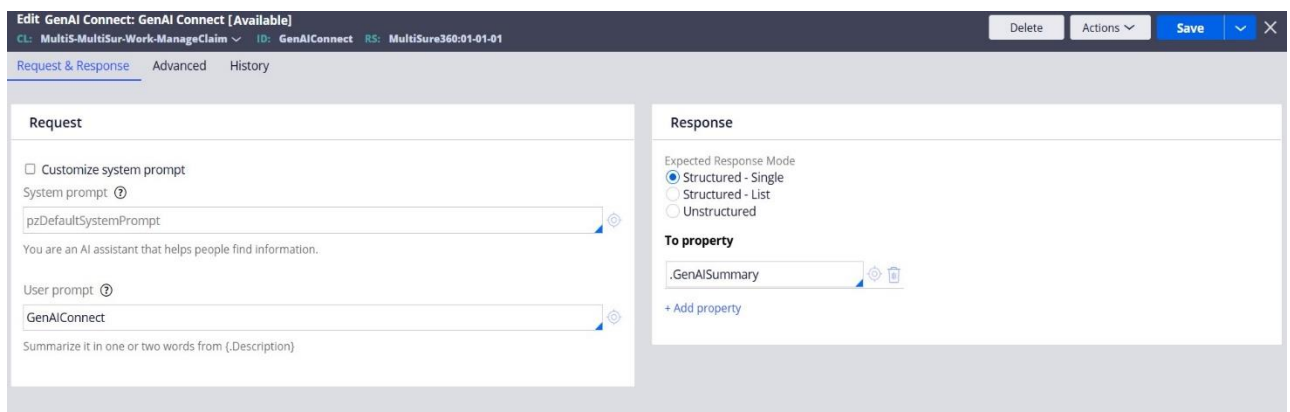
8. Now, we run the case to see the results. I have provided a detailed description consisting of more than 200 words which might be difficult for the claim reviewer to go through each large paragraphs.

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.

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