



CEPTES

Complaints
Management
Implementation

Implementation Overview

A leading diabetic care center had been looking for an authentic complaint management system in order to improve transparency and customer communication. CEPTES, experts in Salesforce integration, customization, and workflow optimization, were called upon to perform the entire implementation.

This implementation process involved integration for case objects, custom objects, and an AppExchange complaints product and configuration. The entire project was delivered using agile methodology to deliver the project in a phased approach.

The Requirements

The goal of this project was to substitute the existing complaint management system with TrackWise Digital, a QMS solution developed by Sparta Systems that is built on the Salesforce AppCloud platform.

Some of the anticipated benefits of this new complaint system included:

- ✧ Greater customer satisfaction through improved transparency and communication.
- ✧ Improved data management / validated reporting to support quality decision making and audits.
- ✧ Better user supportability, along with complete support for both systems and integration.
- ✧ Improved system performance for future growth by leveraging the enhanced speed and reliability of a cloud-based solution.

Business Challenge

The company's old complaint management system, Innovative Quality (IQ), was no longer supported by the vendor. There was a huge need to adopt a new system in order to maintain the continuity of complaint management, medical event reporting, and the related processes. In addition, the company wanted to avoid the risks of using an unsupported system.

The new system needed to contain all legacy data as well as support key functionality including like:

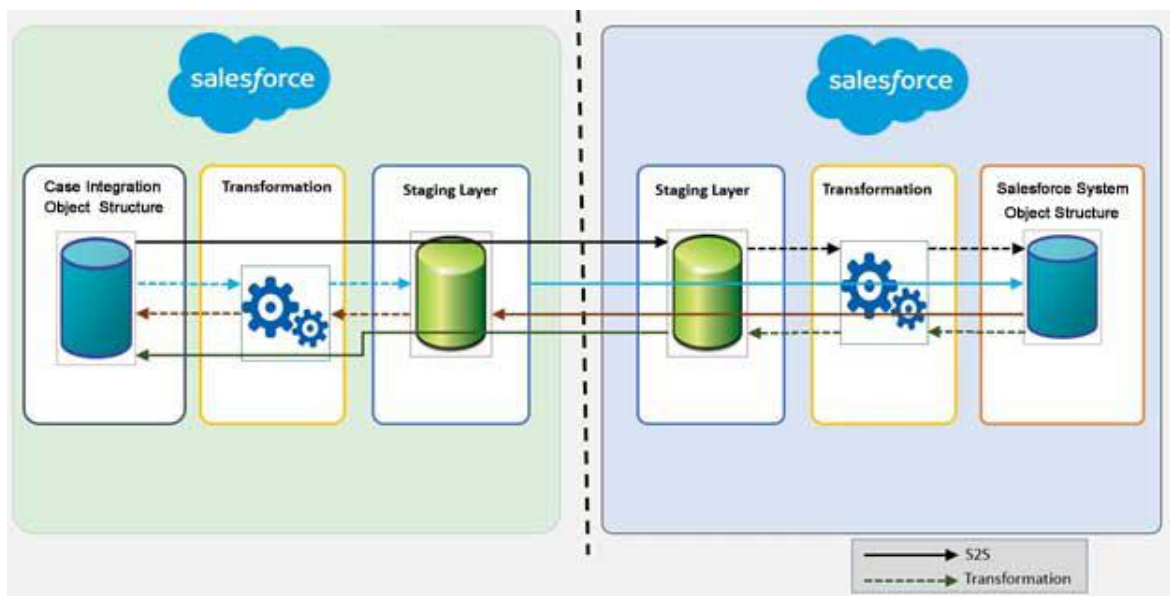
- ✧ Case integration
- ✧ Complaint handling process
- ✧ Running and re-running decision trees
- ✧ Regulatory submissions
- ✧ E-signature on field changes

The Solution

The client chose to implement TrackWise Digital, an an out-of-the-box cloud-based quality management and compliance platform that helps companies automate and streamline quality and compliance management related processes.

Legacy Case Migration

CEPTES took all of the cases that had been created in the client's old complaint handling system and successfully migrated them to TrackWise Digital. Thus, the client would have continuity between the old system and the new one that was put place.



Implementation of the Complaint Handling Process

Another critical component of the solution was the complaint handling process. Complaints are created from cases. Once a complaint is generated a user needs to be able to determine whether the complaint is reportable or non-reportable with the help of the decision trees. Once it is determined as reportable, the complaint should be submitted to the respective regulatory authority.

Running and Re-Running Decision Trees on Multiple Complaints

One of the requirements was to run a decision tree on one or more complaints at the same time. In order to achieve this, CEPTES developed a custom solution with the help of Visualforce pages, where the customer was provided with an interface where they could select multiple complaints on which the same decision tree could be run and re-run.

Automation of Regulatory Submissions

Using the data model that TrackWise Digital provides for regulatory submissions, CEPTES created an interface that automatically create records needed for regulatory reporting.

In the old complaint management system, eMDRs were submitted to the FDA using TIBCO as a middleware. The client requested similar functionality where eMDR's be sent to the FDA via TIBCO, and as a result TrackWise Digital was integrated with TIBCO.

E-Signature on Data Changes

TrackWise Digital allows users to perform e-signatures only while performing business workflow actions. CEPTES came up with a solution where all sensitive fields requiring e-signatures were added as a separate section. This was done to perform data changes, even while the customer was using e-signature.

The Advantages of TrackWise Digital Implemented by CEPTES

- ✧ An easier to use and maintain system that is easy to integrate with other systems.
- ✧ Ability to perform e-signatures on all critical data changes.
- ✧ No impact to third party integrations, and integration with TIBCO.
- ✧ Less manual effort.

Request a call with one of our expert Salesforce consultants today:

Request a Consultation



Phone: +1 (323) 602-0606

E-mail: contact@ceptes.com

United States

CEPTES Software Inc 50 Barranca Ave No
11, Santa Barbara, CA - 93109

New Zealand

CEPTES Limited 39 Redwood
Ave, Tawa, Wellington - 5028

India

CEPTES Software Pvt. Ltd. Unit 519A, 2nd Floor, Beta Block,
Sigma Tech Park, Whitefield Road, Bangalore - 560066