



Pragma Health Care
Version 1.0.0
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1. Introduction

Pragma Health Care solution helps to manage the in-patient leads for a hospital. Hospitals get leads in the following different ways:

- ACD Information (After Consult Desk)
- Direct Enquiry Quotation
- Enquiry TPA Desk

Pragma Health Care solution would be used in hospital to record the in-patient leads and follow up with patient using phone call activity. When the lead agrees to get treated in the hospital the lead is won and contact is created for the patient.

Pragma Health Care is packaged with Pragma Auto Numbering solution. Pragma Auto Numbering is used to generate incremental ID for the leads created in the system.

Underlying Features of Pragma Health Care:

1. Aggregate Leads from different Sources: Hospital Lead, Web, Chat, Email, SMS, Mobile Apps.
2. Automatic Phone Call creation on Lead creation for follow up.
3. Track an enquiry made in hospital until its closure.
4. User level dashboards to track closure.
5. Rule engine to support lead qualification.
6. Attractive view for contact (Patient/Doctor).
7. Option to allow/skip Phone Call activity creation on holidays.
8. Maintain competitor hospital information for further analysis.
9. Maintain contact attempt count for each patient.
10. Unique number or string for each record using auto numbering solution.

2. Supported MS Dynamic CRM Version

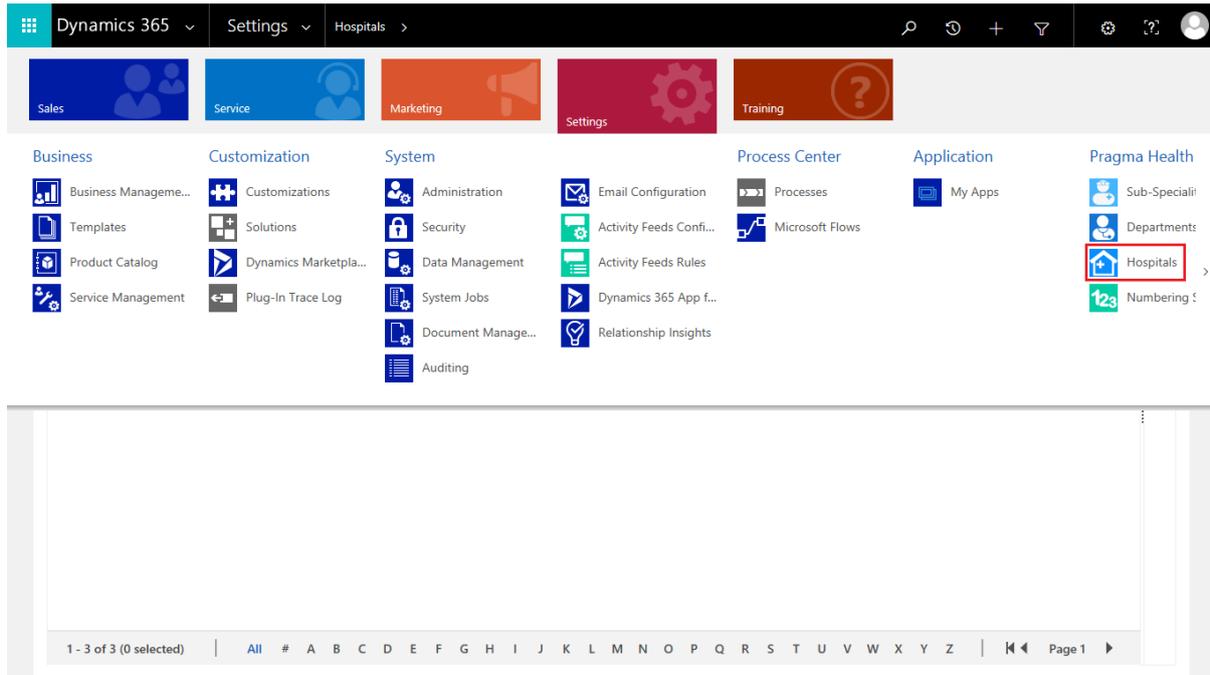
Microsoft Dynamics 365 online.

3. Pragma Health Care Configuration

3.1. Hospital

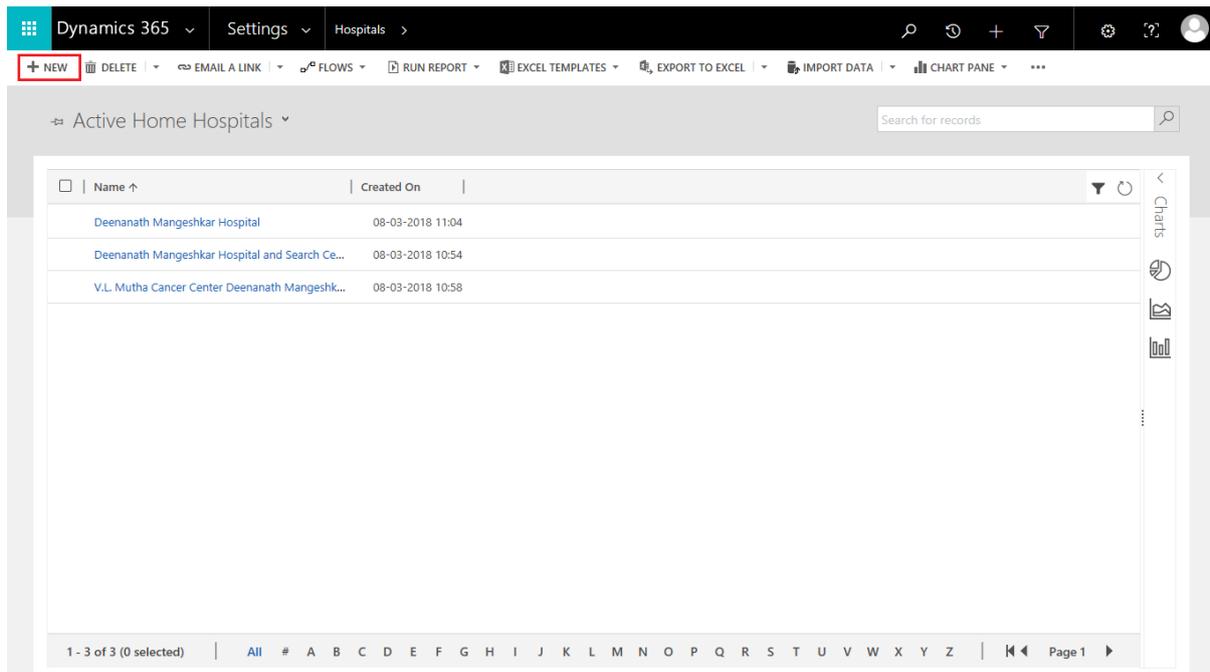
System maintains both, own as well as competitor hospital information. Hospital type is to differentiate own hospital from the competitor hospitals.

1. Navigate Settings -> Pragma Health Care -> Hospitals



The screenshot shows the Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Hospitals'. Below this, there are tabs for Sales, Service, Marketing, Settings, and Training. The main area displays a grid of settings categories: Business, Customization, System, Process Center, Application, and Pragma Health. The 'Hospitals' link under the 'Pragma Health' category is highlighted with a red box.

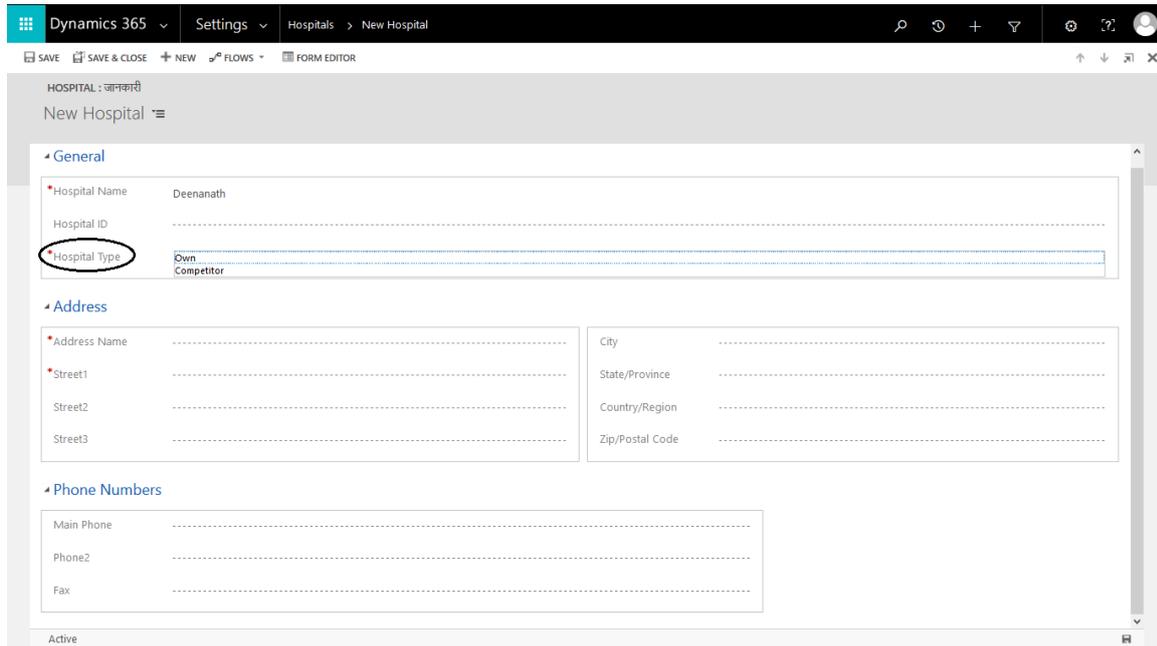
2. Click on “New” on top left corner



The screenshot shows the Dynamics 365 interface for the 'Hospitals' list view. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Hospitals'. Below this, there are tabs for Sales, Service, Marketing, Settings, and Training. The main area displays a list of hospitals. The 'NEW' button is highlighted with a red box.

Name	Created On
Deenanath Mangeshkar Hospital	08-03-2018 11:04
Deenanath Mangeshkar Hospital and Search Ce...	08-03-2018 10:54
V.L. Mutha Cancer Center Deenanath Mangeshk...	08-03-2018 10:58

3.Fill the information must select hospital type for specify own or competitive hospital.



The screenshot shows the 'New Hospital' form in Dynamics 365. The 'Hospital Name' field is filled with 'Deenanath'. The 'Hospital ID' field is empty. The 'Hospital Type' field is circled in red, and a dropdown menu is open, showing 'Own' and 'Competitor' options. The 'Address' section includes fields for Address Name, Street1, Street2, Street3, City, State/Province, Country/Region, and Zip/Postal Code. The 'Phone Numbers' section includes fields for Main Phone, Phone2, and Fax.

No.	Field Name	Description
1.	Hospital Name	Enter the name of own or competitor hospital. It's a mandatory field
2.	Hospital ID	Enter the ID for hospital.
3.	Hospital Type	Select option: 1.Own: indicate hospital is own. 2.Competitor: indicate hospital is competitor hospital. It's a mandatory field.
4.	Address Name	Mandatory field enter address of hospital.
5.	Street1	Mandatory field enter street1.
6.	Street2	Enter street2 name.
7.	Street3	Enter street3 name.
8.	City	Enter city of where hospital is located.
9.	State/Providence	Enter state/providence
10.	Country/Region	Enter country/reason
11.	Zip/Postal Code	Zip code of location
12.	Main Phone	Enter main phone available in hospital
13.	Phone2	Enter phone2 for alternate phone
14.	Fax	Enter Fax

3.2. Holidays

Create a list of holidays and off work time to exclude when creating a Phone call activity for follow up.

Find the holiday schedule and customer service schedule under Settings -> Service Management -> Service Terms section as shown below.

Dynamics 365 Settings Service Management

Service Management

Service Terms

- Service Level Agreements**
Create and manage service level agreements (SLAs), and associate them to a customer service schedule. Define failure and warning violation time, and the actions associated with SLAs.
- Entitlements**
Create and manage entitlements, and associate them with a customer. Define and manage entitlement terms of service for multiple channels.
- Holiday Schedule**
Create and manage a list of holidays for the customer service schedule. Associating the holiday schedule with a service schedule determines SLA time calculations.
- Service Configuration Settings**
Set system-level service settings for your organization.
- Customer Service Schedule**
Create and manage customer service schedules for the organization.

Knowledge Base Management

- Embedded Knowledge Search**
Configure the knowledge search control to use the Dynamics 365 knowledge base or Parature. Add the control to additional record types in Dynamics 365.
- Categories**
Create and manage information in a category tree. This helps to categorize an organization's knowledge base so contacts can find information.

Templates

- Entitlement Templates**
Create and manage templates for creating entitlements.
- Email Templates**
Create and manage templates for email messages.
- Article Templates**
Create and manage templates for articles in the knowledge base.
- Contract Templates**
Create and manage templates for contracts.

Service Scheduling

Holiday Schedule:

Define Hospital level holidays in the holidays schedules. This predefined holiday schedule can be used in the Customer Service Schedule which helps to manage Patient follow up.

How to create and setup Holiday Schedule:

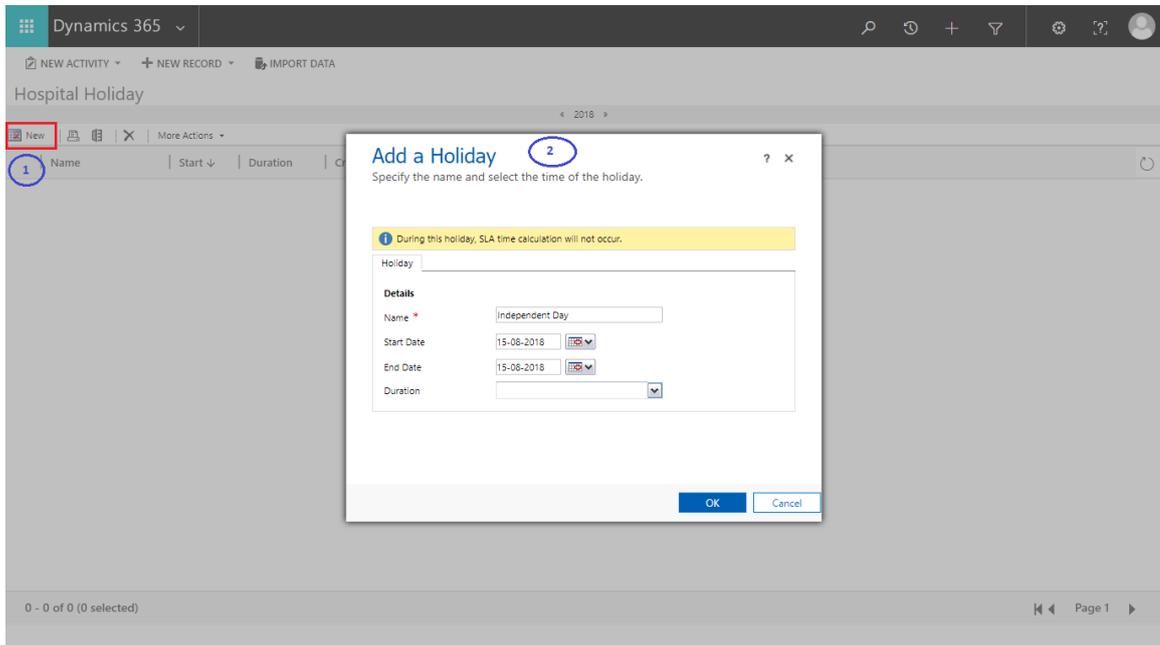
1. Navigate to -> Settings -> Service Management -> Service Teams -> Holiday Schedule.
2. Click "New" and specify the Name and description of the Holiday Schedule and click on "Create"

Create Holiday Schedule ×

Name *

Description

3. Create “Holidays for 2018” schedule. Add all business closure dates under this schedule. We can also mention the number of days in the holiday



The screenshot shows the Dynamics 365 interface for creating a holiday. A dialog box titled "Add a Holiday" is open, with a "New" button highlighted in the background. The dialog box contains the following fields:

- Holiday:** A dropdown menu.
- Details:**
 - Name *:** A text input field containing "Independent Day".
 - Start Date:** A date picker set to "15-08-2018".
 - End Date:** A date picker set to "15-08-2018".
 - Duration:** A dropdown menu.

Buttons for "OK" and "Cancel" are at the bottom right of the dialog box.

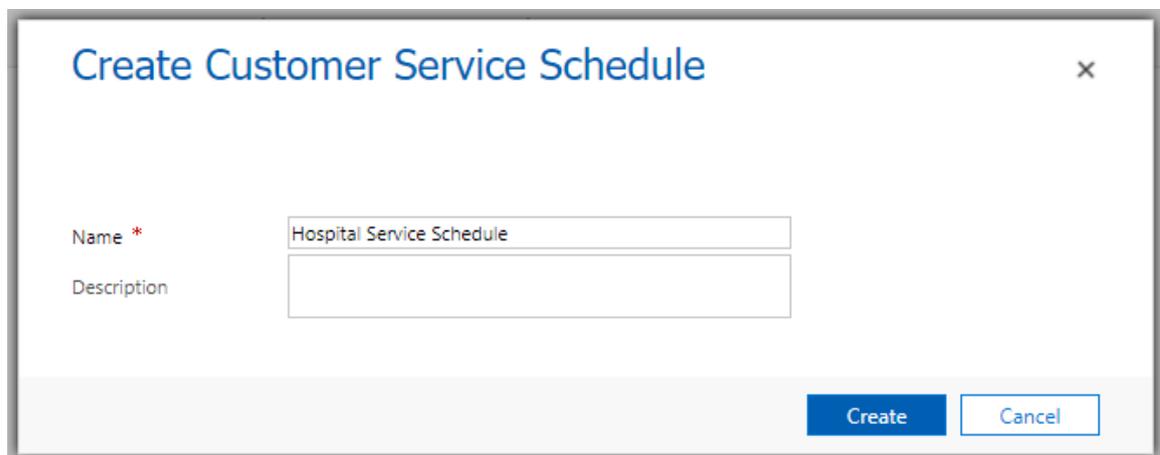
4. On holiday record, start and end time must be specified. You can also set the duration holidays from the start date and it will automatically calculate and set end date accordingly

Customer Service Schedule:

Here we can define when and which days/times our service or support team is available. And Depending on time availability Phone call activity created.

How to create and setup Customer schedule:

1. Navigate to Settings -> Service Management -> Service Terms -> Customer Service Schedule.
2. Click on “New” and specify the Name and description of the Customer Service Schedule and click on “Create”.

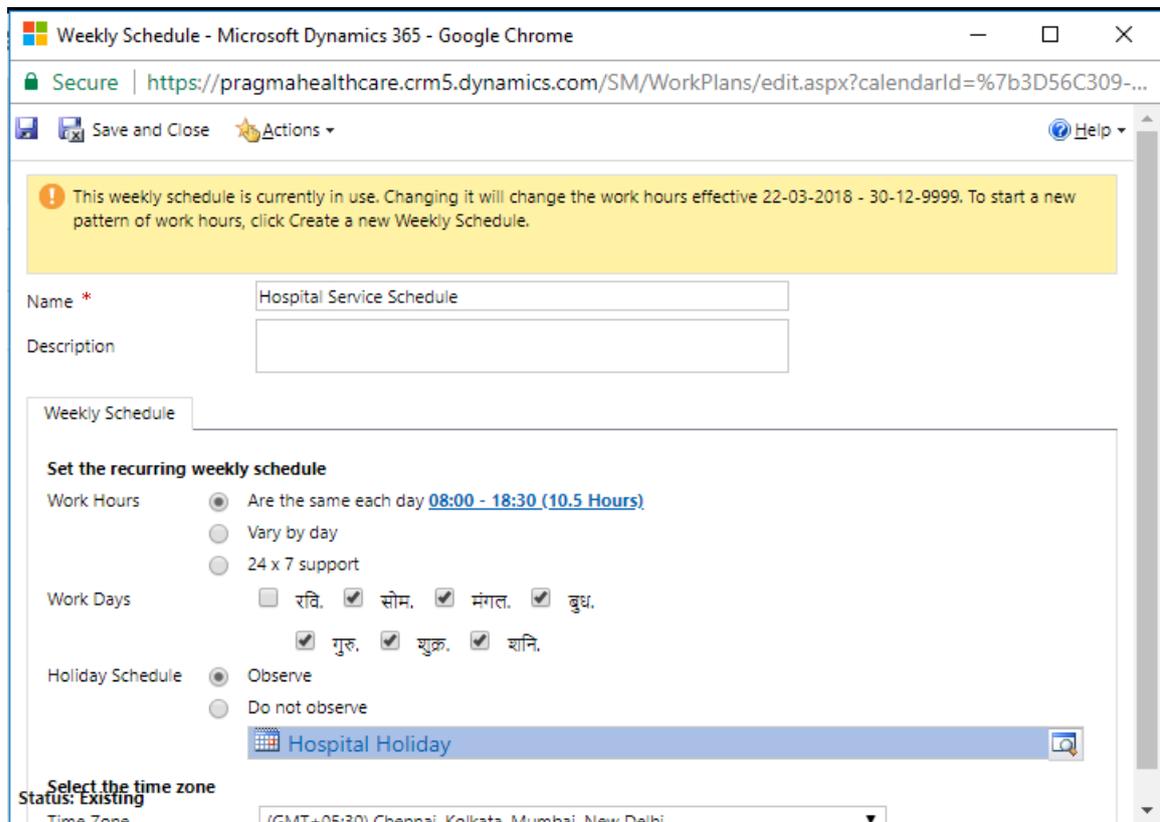


The screenshot shows the "Create Customer Service Schedule" dialog box. It contains the following fields:

- Name *:** A text input field containing "Hospital Service Schedule".
- Description:** An empty text input field.

Buttons for "Create" and "Cancel" are at the bottom right of the dialog box.

- This opens a dialog to set the availability in the below screenshot and you will notice two major sections: "Set the recurring weekly schedule" and "Select the time zone".



Weekly Schedule - Microsoft Dynamics 365 - Google Chrome

Secure | <https://pragmahhealthcare.crm5.dynamics.com/SM/WorkPlans/edit.aspx?calendarId=%7b3D56C309-...>

Save and Close Actions Help

! This weekly schedule is currently in use. Changing it will change the work hours effective 22-03-2018 - 30-12-9999. To start a new pattern of work hours, click Create a new Weekly Schedule.

Name * Hospital Service Schedule

Description

Weekly Schedule

Set the recurring weekly schedule

Work Hours Are the same each day **08:00 - 18:30 (10.5 Hours)**
 Vary by day
 24 x 7 support

Work Days रवि सोम मंगल बुध.
 गुरु शुक्र शनि.

Holiday Schedule Observe
 Do not observe

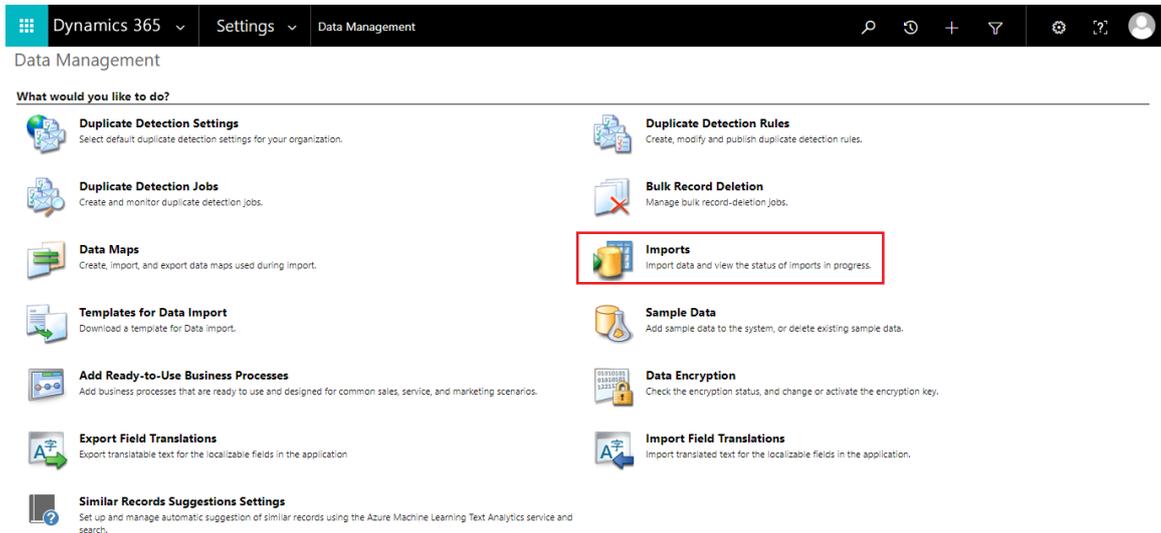
Select the time zone
Status: Existing
Time Zone (GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi

3.3. Department and Sub-Specialty

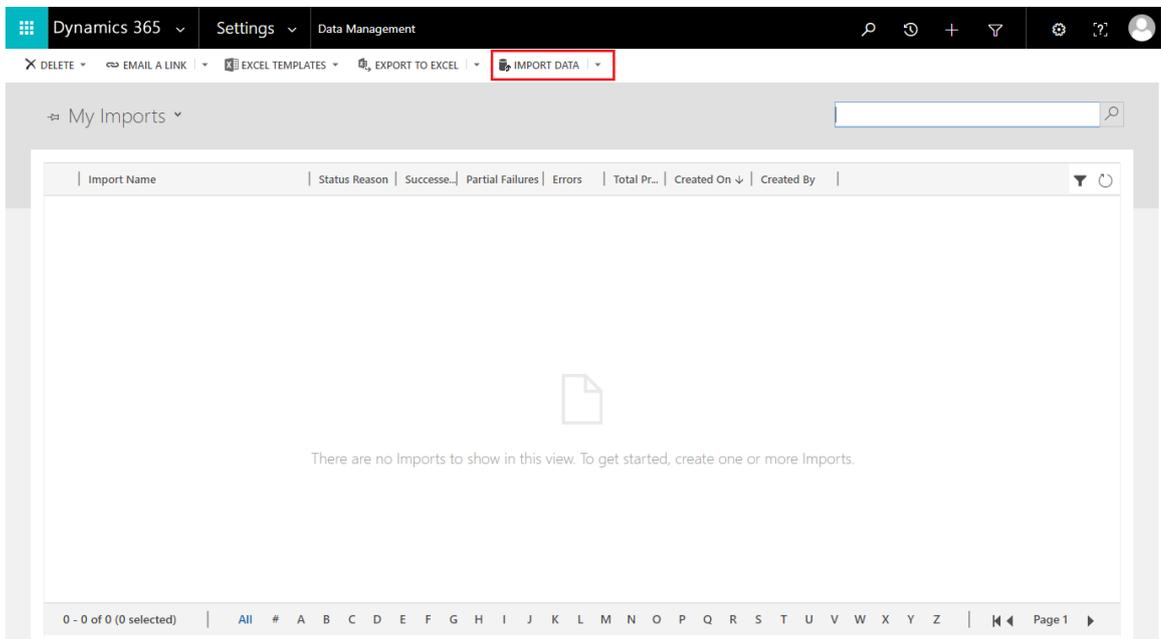
As part of the solution we are providing predefined set of Department and Sub-specialty data that are common for the current period. The user also has the option to add or update the data through user interface. Both has been explained below

3.3.1. Import Excel

1. In your CRM environment, navigate to Settings > Data Management > Imports,



2. Click import data.



3. This will open a file select window where you will select your .csv file,

Upload Data File [Help](#)

Select a data file to import into Microsoft Dynamics 365.

Data file name:

Department.csv

Supported file types: XML Spreadsheet 2003 (.xml), .csv, .txt, .xlsx, and .zip


Drag your file here

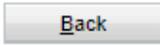
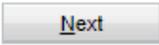
4. Which will open an import wizard that will guide you through the process of successfully importing your data as Department.

Map Record Types

Map the source data files to the target Microsoft Dynamics 365 record types. If a source file cannot be mapped to an existing record type, you can create a new record type or choose to skip importing the data.

 The data files have been successfully mapped to the target Microsoft Dynamics 365 record types.

Source Data Files	Microsoft Dynamics 365 Record Types
 Department	Department 

- This will show you a list of all the Departments created from .csv file.

Dynamics 365 Settings Data Management

DELETE EMAIL A LINK EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA

My Imports Search for records

Import Name	Status Reason	Successes	Partial Failures	Errors	Total Processed	Created On	Created By
Sub-Specialty.csv	Completed	237	0	0	237	27-03-2018 1...	harshal shinde
Department.csv	Completed	193	0	0	193	27-03-2018 1...	harshal shinde

1 - 2 of 2 (0 selected) All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Page 1

6. Follow the same procedure for importing Sub-Speciality Data.

3.3.2. Create Department and Sub-Specialty

1. In your CRM environment, navigate to Settings > Pragma Health Care > Department,

Dynamics 365 Settings Departments

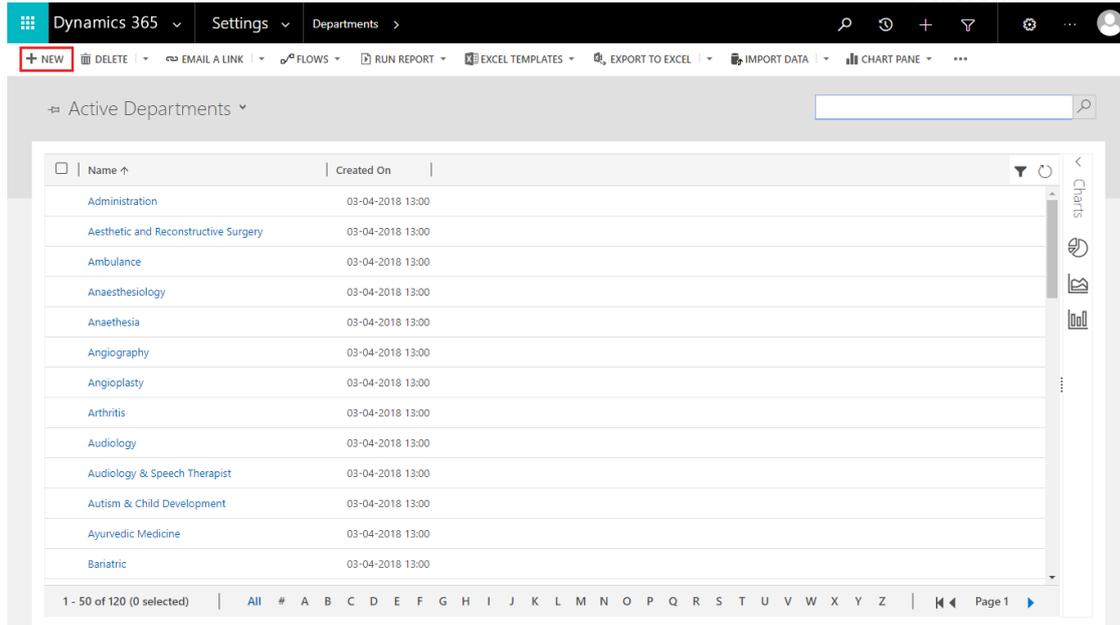
Sales Service Marketing Settings Training

Business Customization System Process Center Application Pragma Health Care

- Business Management
- Templates
- Product Catalog
- Service Management
- Customizations
- Solutions
- Dynamics Marketpla...
- Plug-In Trace Log
- Administration
- Security
- Data Management
- System Jobs
- Document Manage...
- Auditing
- Email Configuration
- Activity Feeds Conf...
- Activity Feeds Rules
- Dynamics 365 App f...
- Relationship Insights
- Processes
- Microsoft Flows
- My Apps
- Sub-Specialty
- Departments**
- Hospitals
- Numbering Schemes

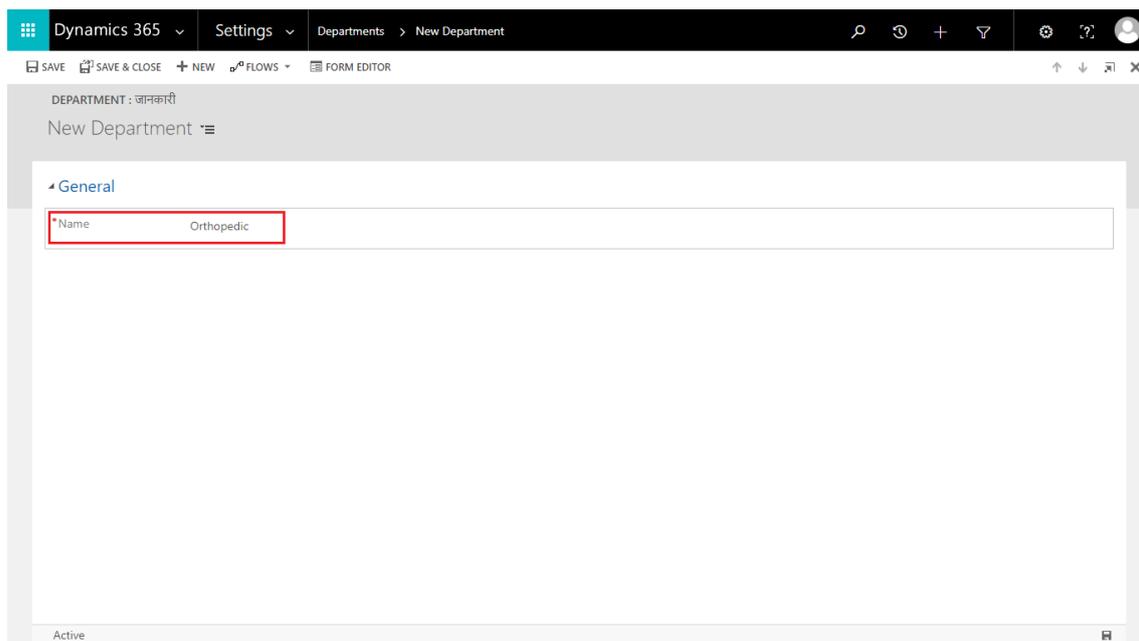
1 - 6 of 6 (0 selected) All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Page 1

2. Click on new (+) on top left corner.



The screenshot shows the Dynamics 365 interface for the 'Settings' section, specifically the 'Departments' list. The 'NEW' button is highlighted with a red box. The list displays various departments, all created on 03-04-2018 at 13:00. The departments listed are: Administration, Aesthetic and Reconstructive Surgery, Ambulance, Anaesthesiology, Anaesthesia, Angiography, Angioplasty, Arthritis, Audiology, Audiology & Speech Therapist, Autism & Child Development, Ayurvedic Medicine, and Bariatric.

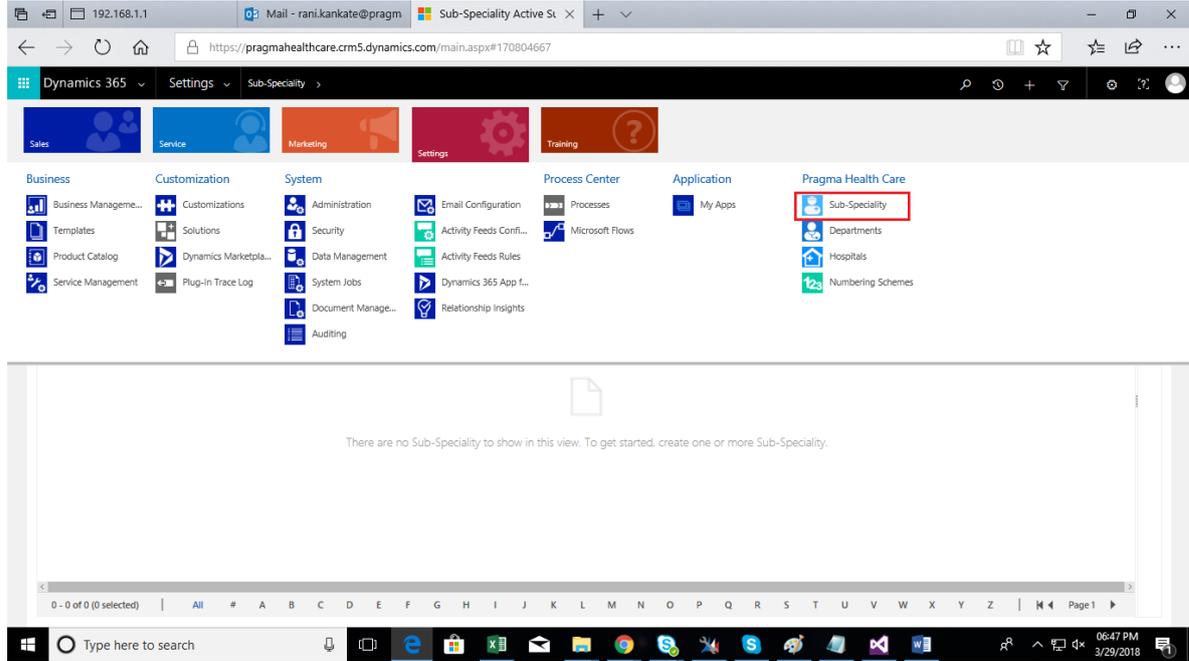
3. Enter Department name and save the Department.



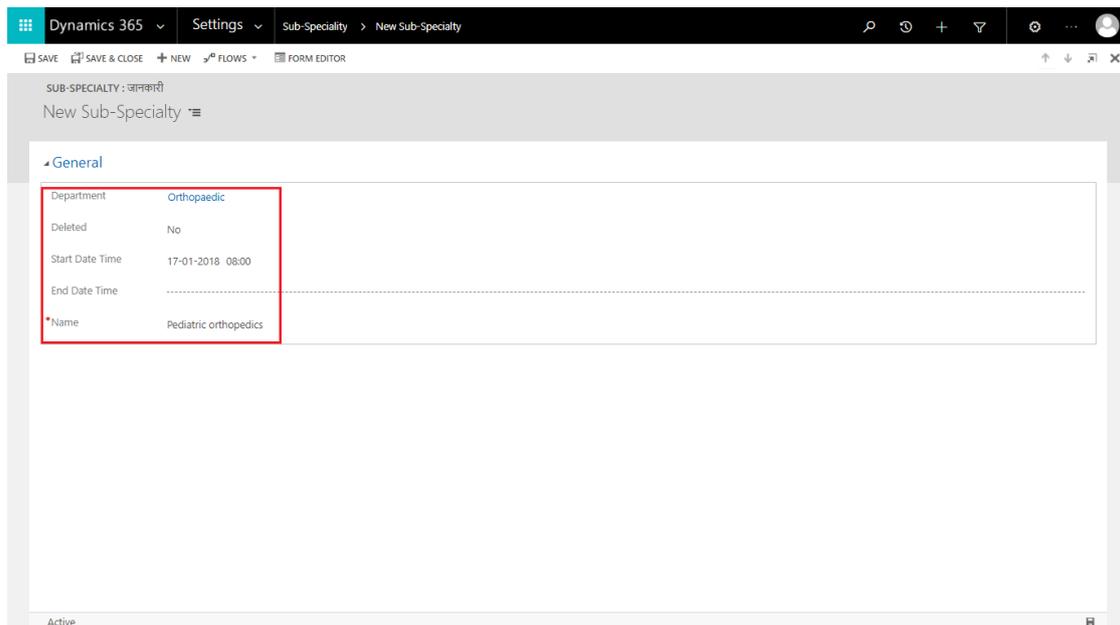
The screenshot shows the 'New Department' form in Dynamics 365. The 'Name' field is highlighted with a red box and contains the text 'Orthopedic'. The form is titled 'DEPARTMENT : जानकारी' and 'New Department'. The 'General' section is expanded, and the 'Name' field is the only one visible.

NO.	Field Name	Description
1	Name	Enter the Department name.

4. For above Department we add Sub-Specialist by navigating Settings -> Pragma Health Care -> Sub-Specialty.



5. Click on New and Fill the Information for Sub-Specialty and save the information.



NO.	Field Name	Description
1	Department	Select the Department name from list to add sub specialty under this Department.
2	Deleted	Specialty is available or not in Hospital specify selecting an option or in feature specialty not available in Hospital then update this field. 1. Yes: When this specialty not available in hospital yes is selected. 2.No: When specialty available in Hospital no is selected.

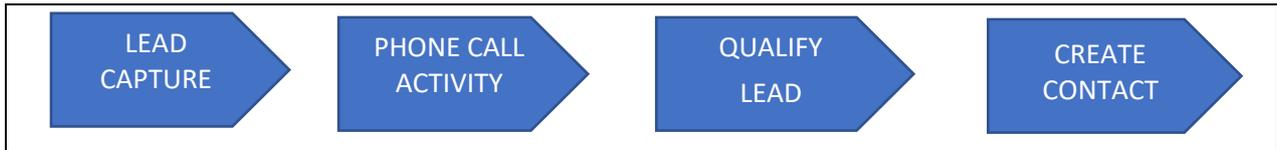
3	Start Date Time	Specify the Start Date time of this Specialty in Hospital.
4	End Date Time	Specify from when this Specialty is not available in the Hospital. When end date of Specialty is selected update deleted field to yes.
5	Name	Specify the name of Sub-Specialty

4. Pragma Health Care Flow

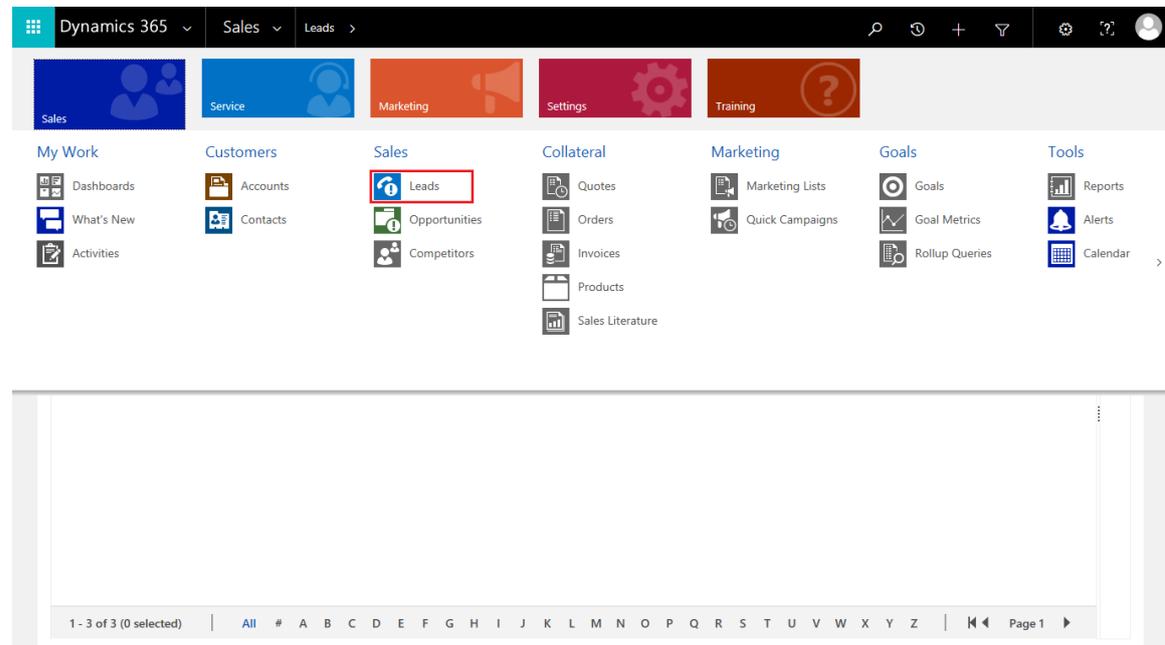
The process flow of Pragma Health Care is as below:

- 1.) Lead Capture
- 2.) Phone Call Activity creation
- 3.) Qualify the Lead
- 4.) Create Contact

Below depicts the detailed process flow step by step of Pragma Health Care.



1. To view Lead entity, go **Sales** inside **Sales Area**.



2. Click on Lead, then click on “New” on top left corner, below screen will open. Enter Patient details then click “Save” or “Save and Close” to save Patient details.

Dynamics 365 Sales Leads > Nitin Ramapure

NEW DELETE QUALIFY PROCESS DISQUALIFY ADD TO MARKETING LIST ASSIGN SHARE EMAIL A LINK

LEAD : LEAD@HOSPITAL Nitin Ramapure

Last Contact Attempt Status: New Status Reason: New Owner: Rani Kankate Status: Open

Summary

Contact Information	Description	Lead Detail
*First Name: Nitin *Last Name: Ramapure *Mobile Phone: 8901345798 Alternate Phone Number: 907609187 Email: nitin.ramapure@pragmasys.in Gender: Male Age: 30 Existing Patient: Doctor's Name: Billing Types: Cash Remarks:	*Title: Teeth Pain Lead Description: Hospital Details: Hospital: Deenanath Mangeshkar Hospital	Patient Id: PA0002 Lead Origin: Hospital lead *Department Name: Dentistry *Service Requested: Dentist Budget Amount: ₹4,000.00 Contact Attempts: 0
Address Details		Administration
Street 1: Street 2: Street 3: Open		Modified On: 06-04-2018 11:47 Modified By: Rani Kankate Created On: 06-04-2018 11:22 Created By: Rani Kankate

No.	Field Name	Description
1	First Name	Mandatory enter First Name of Patient
2	Last Name	Mandatory enter Last Name of Patient
3	Age	Enter Age of Patient.
4	Gender	Specify Gender. 1.Male 2. Female 3. Other
5	Mobile Phone	Mandatory enter Patient Contact Number for taking follow up of that patient.
6	Alternate number	Enter Alternate number of patient for contact.
7	Existing Patient	Select If Patient already done treatment from hospital. Select patient name from Existing Patient lookup.
8	Email	Enter Email id of patient.
9	Doctor's Name	Depending on department doctor with specific specialty will be display in doctor's name field or Patient can be suggesting doctor name for the treatment.
10	Summary	Mandatory enter lead summary.
11	Lead Description	Enter Detail description about the patient or the service requested by patient.
12	Patient Id	Auto generated by system for uniquely identify lead.
13	Lead Origin	Select from where patient get hospital information. 1.Hospital Lead: Patient Directly come to hospital. 2.Web: Get information from web portal. 3.Email: Get email from hospital. 4.Chat: Get Information from chatting. 5.SMS: Get SMS from hospital. 6.MobileApp: Get hospital information from mobileapps.
14	Department	Mandatory Service requested by patient belonging to department selected here.
15	Service Requested	Mandatory Specify the service requested by patient.

16	Budget Amount	Enter Patient can be specifying budget amount.
17	Contact Attempt	Display how many times follow up by phone call created for this patient. Auto generated by system.
18	Hospital	Specify in which hospital enquiry in done.
19	Competitor Hospital	When lead is lost because patient goes other hospital for the treatment then competitor hospital is selected.
20	Address Details	Street1, street2, street3, city, state/province, zip code/postal code, country/region. Provide address of patient.
21	Billing Type	Select the Billing type from drop down 1.Cash 2.EWS 3. CAGS 4. Panel 5. Corporate.
22	Remark	Remark for Lead.
23	Modified On	System generate lead modified on date.
24	Modified By	System generate lead modified user name.
25	Created On	System generate lead created on date.
26	Created By	System generate lead created user name.
27	Last Contact Attempt Status	Select regarding patient response from phone call. 1.New: by default, New is selected. 2.Interested: select when patient response is “interested”. 3.In Progress: select when patient responses are “call back later”, “not reachable” and “not picking”. 4.Not Interested: select when patient response is “not interested”. 5.Close as Wrong Number: select when patient response is “wrong number”. 6.Close as Invalid Number: select when patient response is “invalid number”.
28	Status Reason	Select regarding “last contact attempt status”. 1.New: by default, New is selected. 2.Qualify-Admitted: selected when patient admitted in hospital. 3.Proposal Shared/ Awaiting Response: select when last contact attempt status is “in progress”. 4.Patient Confirmed / Awaiting Visit: select when last contact attempt status is “in progress”. 5.Disqualify - Opted Other Hospital: select when last contact attempt status is “not interested”. 6.Disqualify – Unresponsive: select when last contact attempt status is “not interested”. 7.Disqualify(Others): select when last contact attempt status is “not interested”.

- When Patient record save Phone Call activity is created regarding this Patient with due date is after three days of Lead created date with Holiday restrict. Below screen show Phone call activity created.

Dynamics 365 Sales Leads > Nitin Ramapure

LEAD: LEAD@HOSPITAL Nitin Ramapure

Last Contact Attempt Status: New Status Reason: New Owner: Rani Kankate Status: Open

Open Activity Associated View

Subject	Activity Type	Activity Status	Priority	Due Date	Created By	Regarding
Teeth Pain	Phone Call	Open	Normal	09-04-2018 08:00	Rani Kankate	Nitin Ra...

1-1 of 1 | All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Page 1

4. Sales person takes the follow up of Phone call. Depending on patient response can be created next phone call or mark completed to this call.

Scenario 1: Mark completed

Dynamics 365 Sales Activities > Teeth Pain

MARK COMPLETE CLOSE PHONE CALL PROCESS DELETE EMAIL A LINK FORM ASSIGN ADD TO QUEUE CONVERT TO

PHONE CALL Teeth Pain

Priority: Normal Due: 09-04-2018 08:00 Status: Open Owner: Rani Kankate

Subject: Teeth Pain

Call From: Rani Kankate

Call To: Nitin Ramapure

Phone Number: 8901345798 Direction: Outgoing

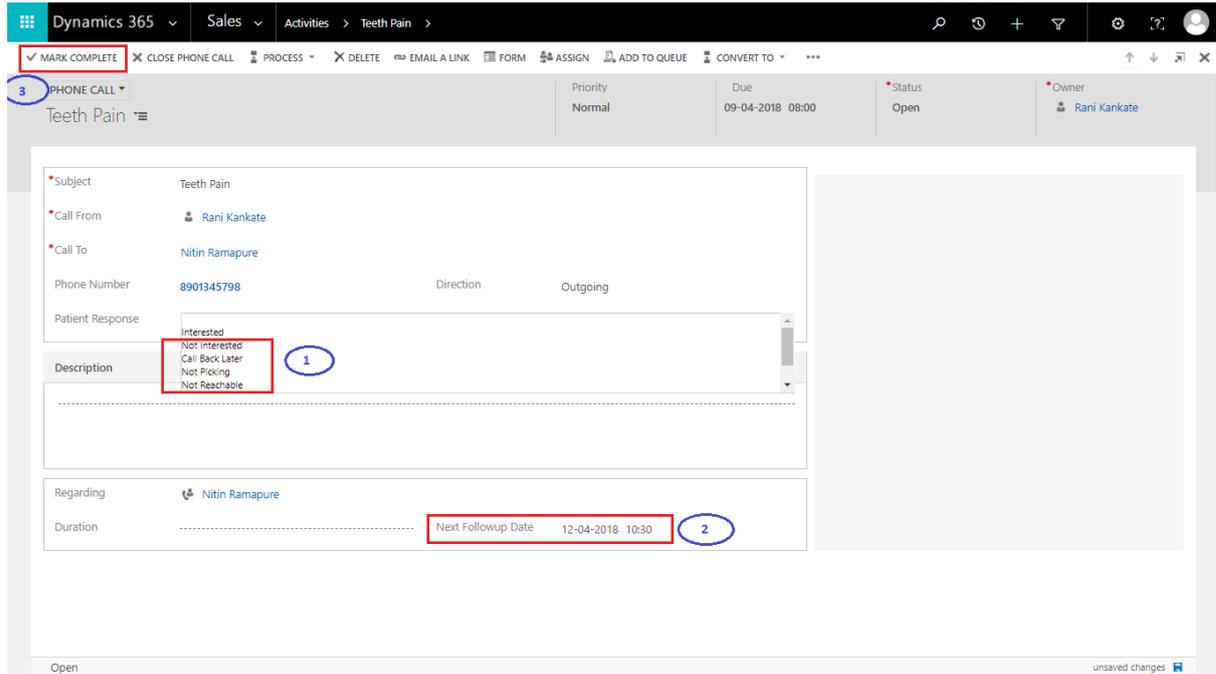
Patient Response: Interested 1

Description:

Regarding: Nitin Ramapure

Duration: Next Followup Date:

Scenario 2: Create next phone call where new Phone call activity due date is next follow up date.



No.	Field	Description
1	Subject	Lead summary as selected as phone call subject.
2	Call From	Lead created by user selected as call from or can be specify another user whom take follow up
3	Phone number	Enter patient phone number.
4	Patient Response	According to patient response last contact attempt status field on lead automatically updated. 1. Interested : Changed to interested. 2. Not Interested : Changed to not interested 3. Call Back Later : Changed to In Progress. 4. Not Picking : No Change 5. Not Reachable : No Change 6. Wrong Number : Close as Wrong Number. 7. Invalid Number : Close as Invalid Number.
5	Next Follow-up Date	Patient response is call back later/not peeking/not reachable then set the next follow-up date for next phone call activity.
6	Description	Enter detail description of follow up.
7	Duration	Enter duration for phone call.

5. When Lead is created 30 days ago then system gives warning message while creating Phone Call activity shown in below screen.

Dynamics 365 | New Phone Call

SAVE MARK COMPLETE SAVE & CLOSE FORM FLOWS

PHONE CALL | Priority: Normal | Due: | Status: Open | Owner: Rani Kankate

It is advised not to create phone call activity against current lead as lead was created 30 day ago

*Subject:

*Call From: Rani Kankate

*Call To: Priyank kulkarni

Phone Number: 9090909023 | Direction: Outgoing

Patient Response:

Description:

Regarding: Priyank kulkarni

Duration: 30 minutes | Next Followup Date:

Open

- From patient response on Phone call activity last contact attempt status automatically get updated.
E.g. if patient response is "interested" then last contact attempt status gets updated to "Interested" show in below screen.

Dynamics 365 | Sales | Leads | Nitin Ramapure

NEW DELETE QUALIFY PROCESS DISQUALIFY ADD TO MARKETING LIST ASSIGN SHARE EMAIL A LINK

LEAD | Nitin Ramapure | Last Contact Attempt Status: Interested | Status: New | Owner: Rani Kankate | Status: Open

Summary

<p>Basic Information</p> <p>*First Name: Nitin</p> <p>*Last Name: Ramapure</p> <p>*Mobile Phone: 8901345798</p> <p>Alternate Phone Number: 9076409187</p> <p>Email: nitin.ramapure@pragmasys.in</p> <p>Gender: Male</p> <p>Age: 30</p> <p>Existing Patient:</p> <p>Doctor's Name: Dr. Neha Agrawal</p> <p>BillingTypes: Cash</p> <p>Remarks:</p>	<p>Description</p> <p>*Summary: Teeth pain</p> <p>Lead Description:</p> <p>Hospital Details</p> <p>Hospital: Deenanath Mangeshkar Hospital</p> <p>Address Details</p> <p>Street 1:</p> <p>Street 2:</p> <p>Street 3:</p> <p>City:</p> <p>State/Province:</p>	<p>Lead Details</p> <p>Patient Id: PA0002</p> <p>Lead Origin: Hospital lead</p> <p>*Department Name: Dentistry</p> <p>*Service Requested: Dentist</p> <p>Budget Amount: ₹4,000.00</p> <p>Contact Attempts: 0</p>
---	---	---

Open

- When last contact attempt status is interested and after patient admitted in Hospital then change Status reason of lead to "Qualify".



Dynamics 365 Sales Leads > Nitin Ramapure

NEW DELETE PROCESS REACTIVATE LEAD ASSIGN SHARE EMAIL A LINK FOLLOW RUN WORKFLOW

LEAD Nitin Ramapure Last Contact Attempt Status Interested Status Won Owner Rani Kankate Status Qualified

Summary

Basic Information	Description	Lead Details
*First Name: Nitin *Last Name: Ramapure *Mobile Phone: 8901345798 Alternate Phone Number: 9076409187 Email: nitin.ramapure@pragmasys.in Gender: Male Age: 30 Existing Patient: Doctor's Name: Dr. Neha Agrawal BillingTypes: Cash Remarks:	*Summary: Teeth pain Lead Description: Hospital Details: Hospital: Deenanath Mangeshkar Hospital Address Details: Street 1: Street 2: Street 3: City: State/Province:	Patient Id: PA0002 Lead Origin: Hospital lead *Department Name: Dentistry *Service Requested: Dentist Budget Amount: ₹4,000.00 Contact Attempts: 0

Qualified Read only

8. Contact record created only when status reason is qualified. For Above Lead Contact created automatically.
9. To view Contact entity, go **Sales** inside **Sales Area**.

Dynamics 365 Sales > Contacts

Sales Service Marketing Settings Training

My Work Customers Sales Collateral Marketing Goals Tools

- My Work: Dashboards, What's New, Activities
- Customers: Accounts, **Contacts**
- Sales: Leads, Opportunities, Competitors
- Collateral: Quotes, Orders, Invoices, Products, Sales Literature
- Marketing: Marketing Lists, Quick Campaigns
- Goals: Goals, Goal Metrics, Rollup Queries
- Tools: Reports, Alerts, Calendar

1 - 3 of 3 (0 selected) | All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Page 1

Dynamics 365 | Sales | Contacts > Nitin Ramapure >

CONTACT: ACTIVE PATIENTS > Nitin Ramapure

Owner: Rani Kankate

Summary

General Details		Hospital Information	
*First Name	Nitin	Patient ID	PA0002
*Last Name	Ramapure	Patient Registration Date	16-04-2018 08:00
Age	30		
Gender	Male		
Contact Type	Patient		
Contact Details		Address	
Business Phone	Address 1: Street 1
*Mobile Phone	8901345798	Address 1: Street 2
Email	nitin.ramapure@pragmasys.in	Address 1: Street 3
Home Phone	9076409187	Address 1: City
		Address 1: State/Province
		Address 1: County
		Address 1: ZIP/Postal

Active

10. Contact can be of Patient or Doctor. For Doctor or Patient have separate view as show in below two screens.

Active Patients:

Dynamics 365 | Sales | Contacts >

Active Patients

Full Name	Email	Mobile Phone	Patient ID	Gender
Ketal Singh	ketal.singh@test.com	8976543010	PA0001	Female
Mitali Shaha	mitali.shaha@test.com	8976509456	PA0003	Female
Nitin Ramapure	nitin.ramapure@prag...	8901345798	PA0002	Male
Rani Kankate		9881530370	PA0004	Female

1 - 4 of 4 (0 selected) | All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Page 1

Active Doctors:

Dynamics 365 Sales Contacts

NEW DELETE EMAIL A LINK FLOWS RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA CHART PANE

Active Doctors

Full Name ↑	Email	Mobile Phone	Designation	Speciality
Dr. Aditya Tripathi	Adityatripathi@gmail.c...	8652414785	Doctor	Neurology
Dr. Neha Agrawal	neha.arawal@test.com	9883456781	Dentist	Dentistry
Dr. Vivek Bindra		975862235	Doctor	Homeopathy

1 - 3 of 3 (0 selected) | All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Page 1

11. Add doctors navigate -> sales -> Contacts -> click on “New”.

Dynamics 365 Sales Contacts

NEW DELETE EMAIL A LINK FLOWS RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA CHART PANE

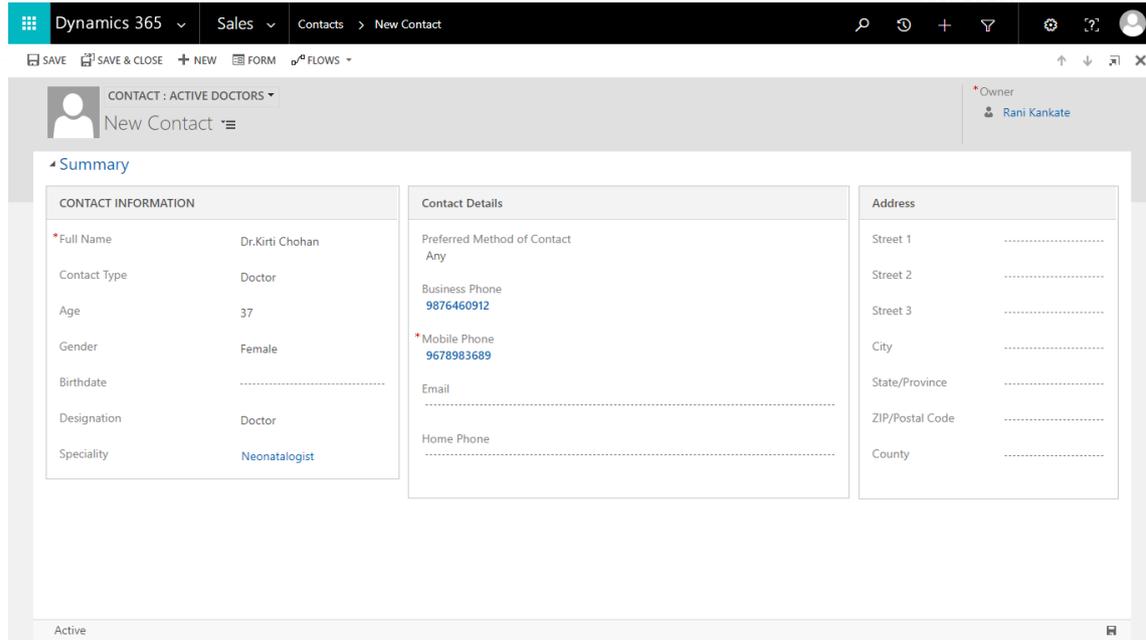
Active Doctors

Search for records

Full Name ↑	Email	Mobile Phone	Designation	Speciality
Dr. Aditya Tripathi	Adityatripathi@gmail.c...	8652414785	Doctor	
Dr. Neha Agrawal	neha.arawal@test.com	9883456781	Dentist	
Dr. Vivek Bindra		975862235	Doctor	

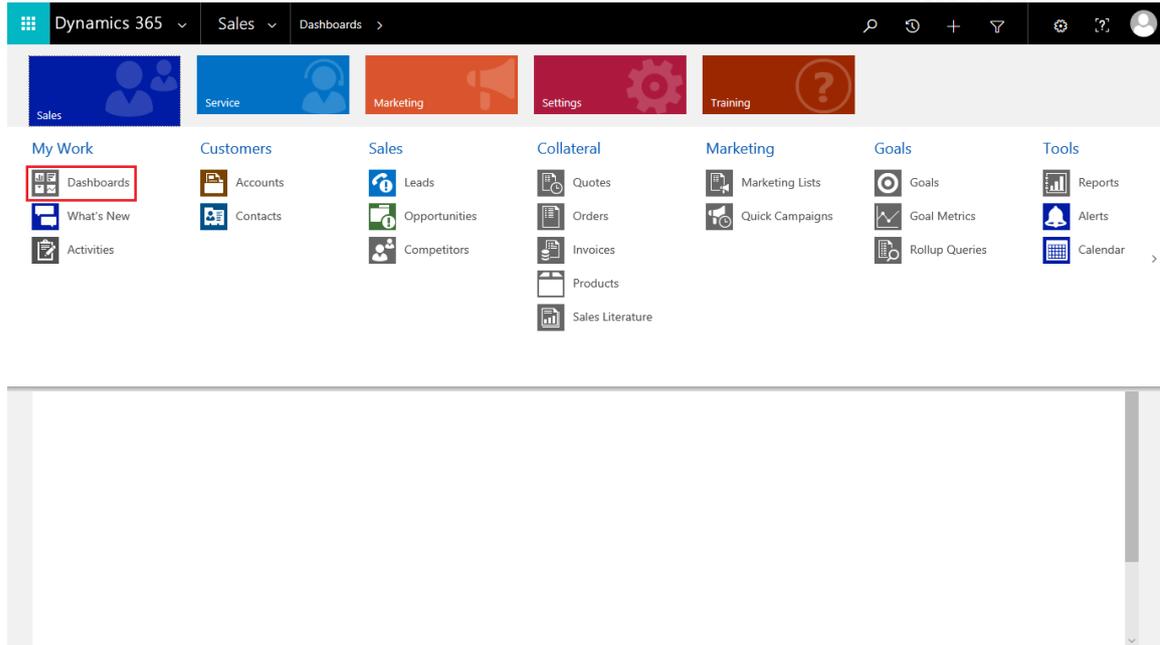
1 - 3 of 3 (0 selected) | All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Page 1

12. Enter doctor details then click “Save” or “Save and Close” to save doctor details.



No.	Field	Description
1	Full Name	Enter first name and last name of doctor. last name is Mandatory.
2	Contact Type	Select contact type. 1.Doctor: contact is doctor. 2. Patient: contact is patient.
3	Age	Enter age of doctor.
4	Gender	Specify Gender. 1.Male 2. Female 3. Other
5	Birth Date	Enter birth date of doctor.
6	Designation	Enter designation of doctor.
7	Speciality	Enter speciality of doctor.
8	Preferred Contact Type	Specify contact type: 1. Any 2. Phone 3. Mail 4. Fax 5. Email
9	Business Phone	
10	Mobile phone	Enter personal mobile phone.
11	Email	Enter email of doctor.
12	Home phone	Enter home phone number.
13	Address	Enter detail address of doctor by specifying strret1, street2, street3, city, state/province, country, zip/postal code.

13. Dashboard for Pragma Health Care is “Health Care Lead Analysis” are collections of view lists, charts to show key performance indicators and other important data. Navigate to Dashboard below screen shows.



14. Below Dashboard shows charts and view list are

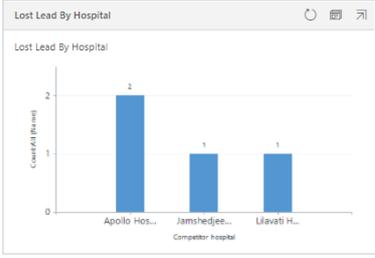
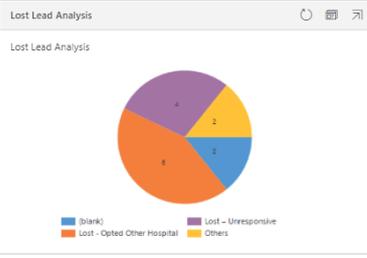
- **Lead Analysis by Week** - Week wise lead analysis by status (Open, Qualify, Disqualify).
- **Lead Analysis by Month** - Month wise lead analysis by status (Open, Qualify, Disqualify).
- **Lead Analysis by Year** - Year wise lead analysis by status (Open, Qualify, Disqualify).
- **Lost Lead Analysis** - Lost lead against different reasons (blank, Lost-Unresponsive, Other, Lost- Opted Other Hospital).
- **Lost Lead by Hospital** - Lost Lead and opted other hospital shows.
- **Lead Over Due Date** - Shows leads whose follow-up is pending and due date is passed away.

HealthCare Lead Analysis



Leads: Over Due Date

Name	Summary	Contact Attem...	Created On
mtisha magar	Enquiry	0	15-03-2018 15:2
priya nimodia	test	0	19-03-2018 17:4
Rani Kankate	test	0	26-03-2018 12:5



5. Conclusion

Pragma Health Care solution helps hospital to accurately track and keep record of their incoming in-patient leads and take timely action to convert it.