



Pragma Health Care

Version 1.0.0

Date:

Email id: support@pragmasys.in

Pragmasys Consulting LLP, Pune

F, Pinnac Memories Phase III
S No 7 & 8, Near CityPride Multiplex,
Kothrud, Pune – 411038

Pragmasys Consulting LLP, Delhi

508-509, Modi Towers,
Nehru Palace,
New Delhi - 110019

Pragmasys Consulting LLP, Mumbai

Unit 326, Lodha Supremus Phase 2
Road No 22, Wagle Estate

Pragmasys Consulting LLP, Bengaluru

#54, 2nd Floor, 5th Main,
Kodihalli, HAL 2nd Stage, Behind Leela

Thane(W), 400604

Palace Hotel.

Bangalore, Karnataka – 560008

Contents

1. Introduction	3
2. Supported MS Dynamic CRM Version.....	4
3. Pragma Health Care Configuration	5
3.1. Hospital	5
3.2. Holidays.....	6
3.3. Department and Sub-Specialty	9
3.3.1. Import Excel	10
3.3.2. Create Department and Sub-Specialty.....	13
4. Pragma Health Care Flow	17
5. Conclusion.....	29

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

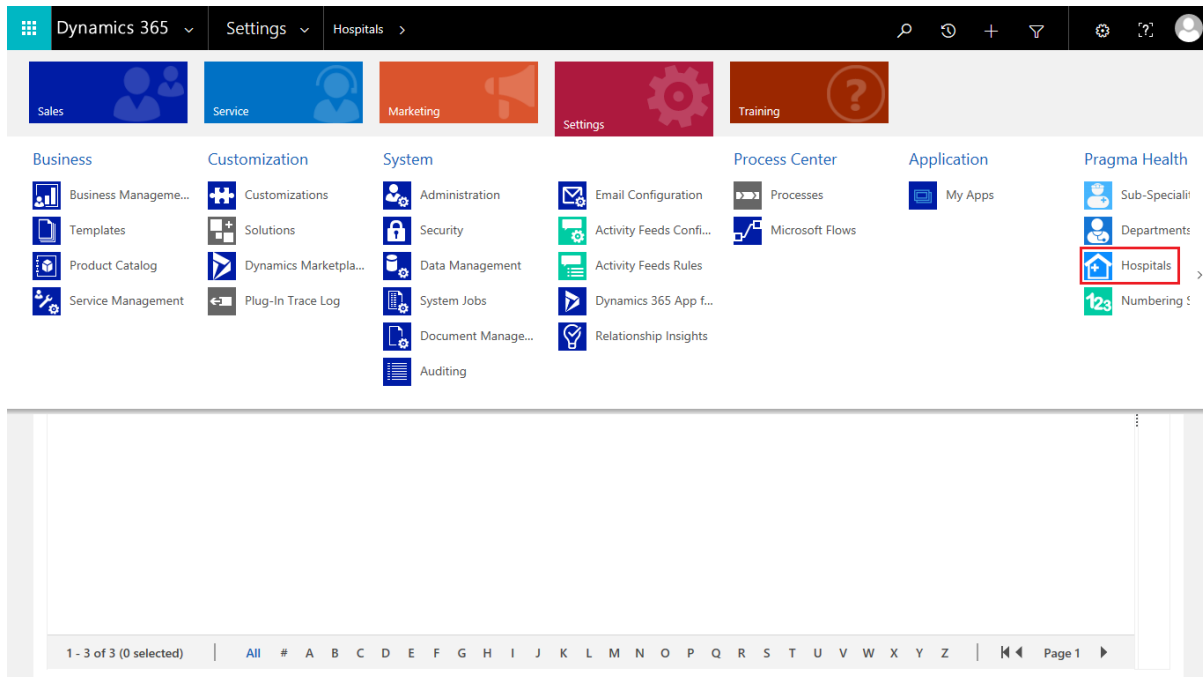
Microsoft Dynamics 365 online.

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.

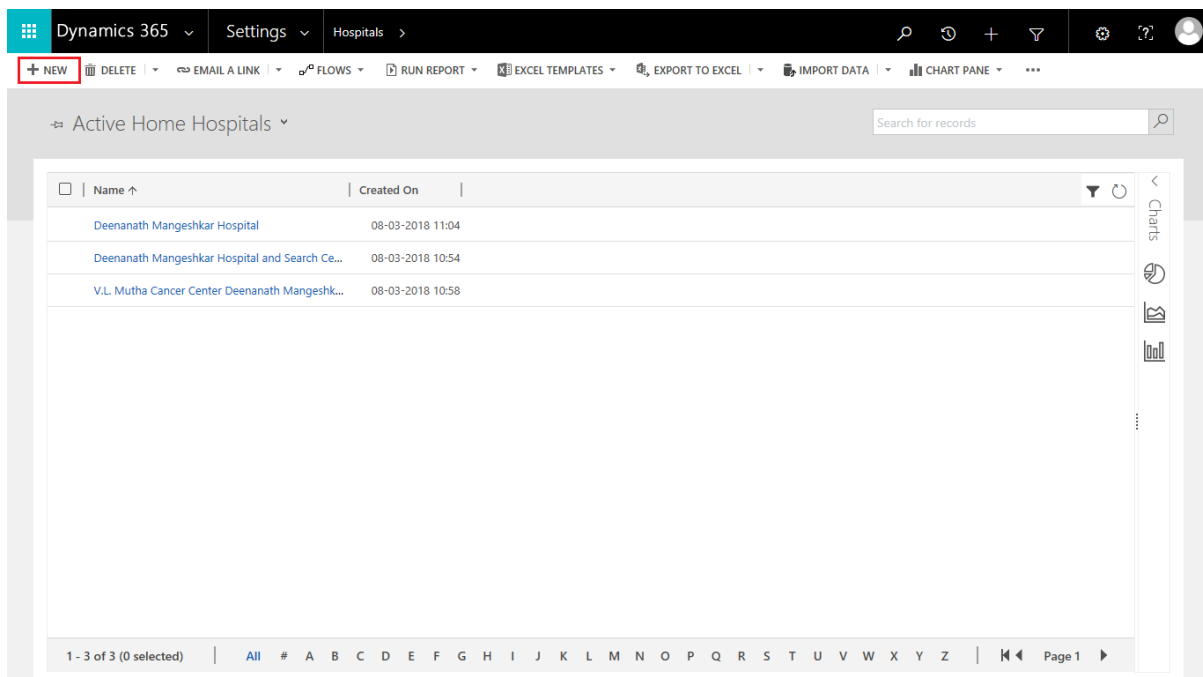
1. Navigate Settings -> Pragma Health Care -> Hospitals



The screenshot shows the Dynamics 365 Settings page. The breadcrumb trail at the top indicates the path: Dynamics 365 > Settings > Hospitals. The left-hand navigation pane is expanded, showing various categories. Under the 'Pragma Health' category, the 'Hospitals' option is highlighted with a red box. Below the navigation pane, a table of records is visible, showing 1 - 3 of 3 records. The table has columns for Name and Created On. The records listed are:

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

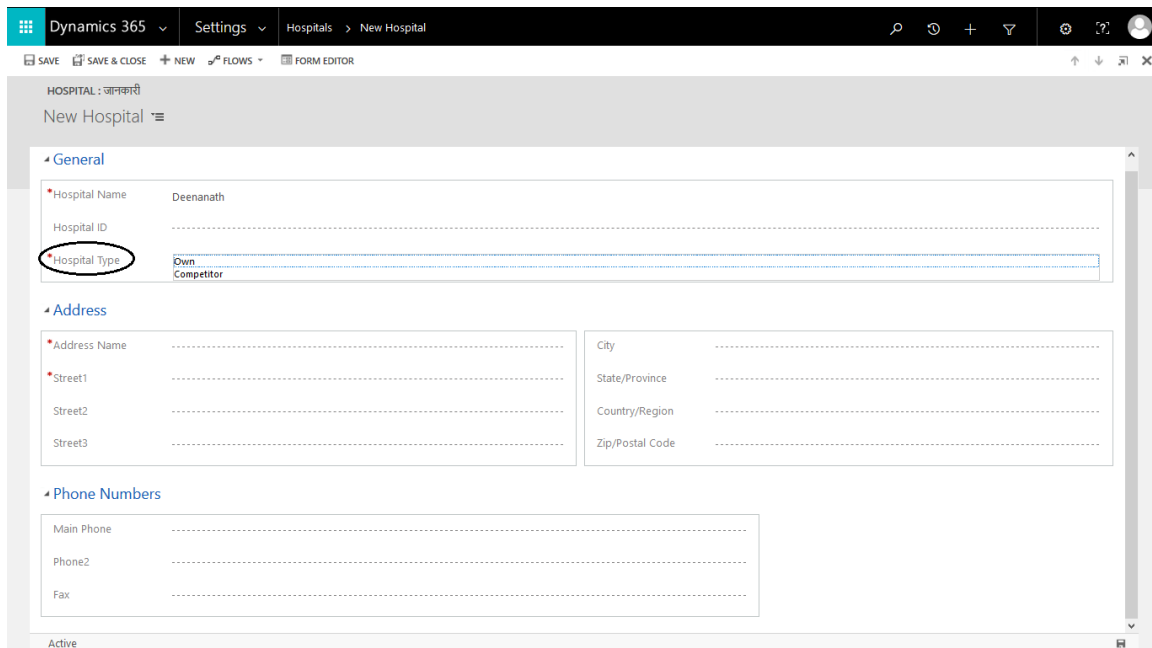
2. Click on "New" on top left corner



The screenshot shows the Dynamics 365 Hospitals page. The breadcrumb trail at the top indicates the path: Dynamics 365 > Settings > Hospitals. The top-left corner of the page features a '+ NEW' button, which is highlighted with a red box. Below the button, a table of records is visible, showing 1 - 3 of 3 records. The table has columns for Name and Created On. The records listed are:

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.



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

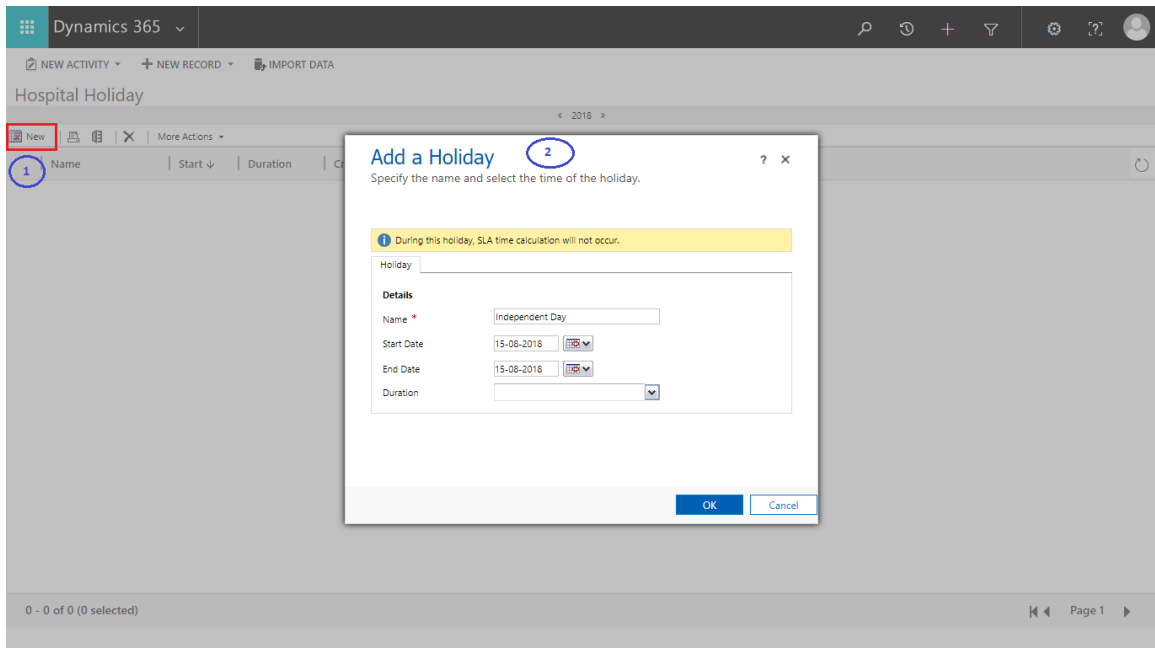
Name *

Description

Create

Cancel

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 with a table titled 'Hospital Holiday'. A 'New' button is circled with a red box and labeled '1'. An 'Add a Holiday' dialog box is open, with its title bar circled with a blue box and labeled '2'. The dialog box contains a message: 'During this holiday, SLA time calculation will not occur.' Below this, there is a 'Details' section with fields for 'Name' (set to 'Independent Day'), 'Start Date' (15-08-2018), 'End Date' (15-08-2018), and 'Duration'. The dialog box has 'OK' and 'Cancel' buttons at the bottom.

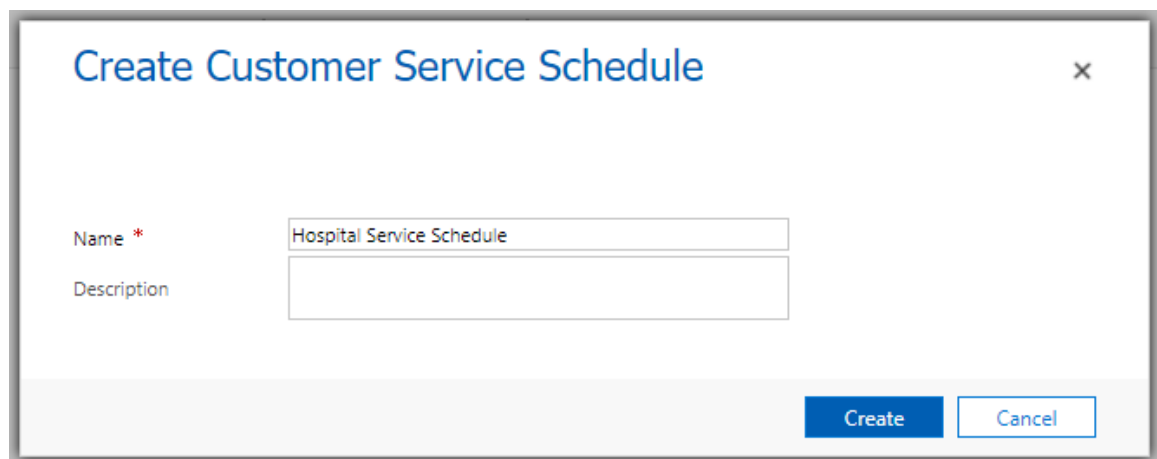
4. On holiday record, start and end time must be specified. You can also set the duration holidays from the start date and it will automatically calculate and set end date accordingly

Customer Service Schedule:

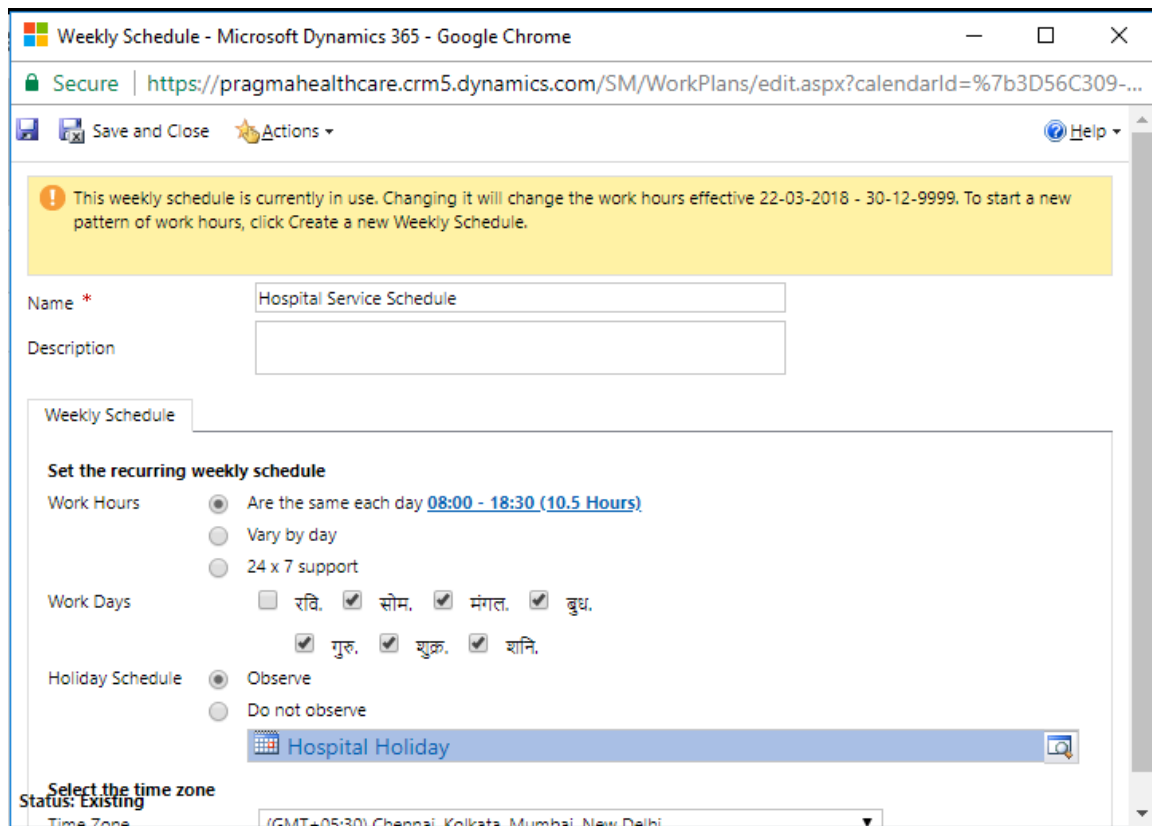
Here we can define when and which days/times our service or support team is available. And Depending on time availability Phone call activity created.

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 a 'Create Customer Service Schedule' dialog box. It has a title bar with a close button. Below the title, there are two input fields: 'Name' (with a red asterisk) and 'Description'. The 'Name' field contains the text 'Hospital Service Schedule'. At the bottom of the dialog box, there are 'Create' and 'Cancel' buttons.

- 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

Warning: 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

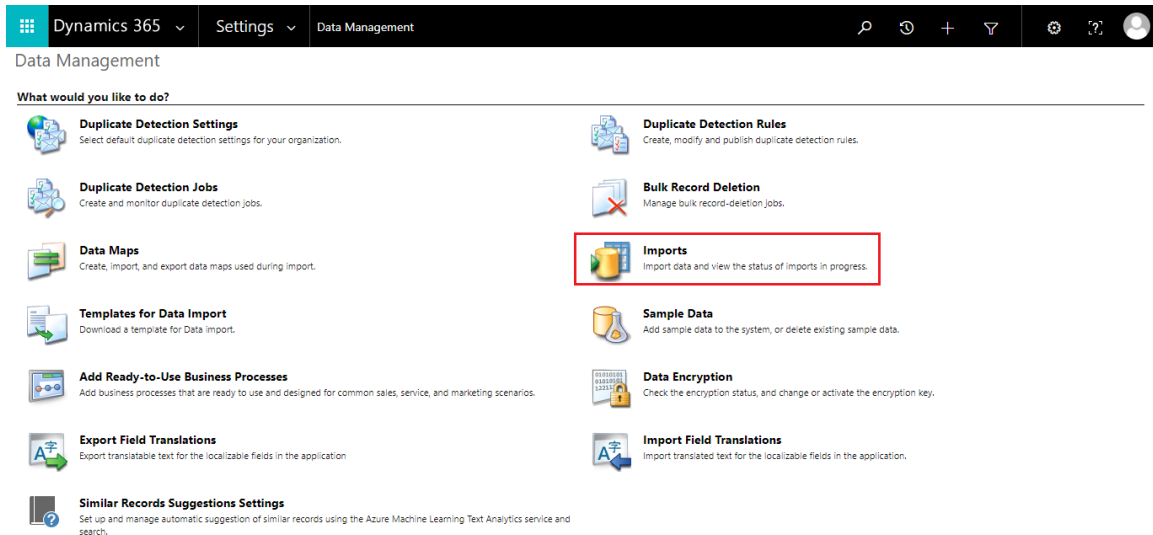
Time Zone (GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi

3.3. Department and Sub-Specialty

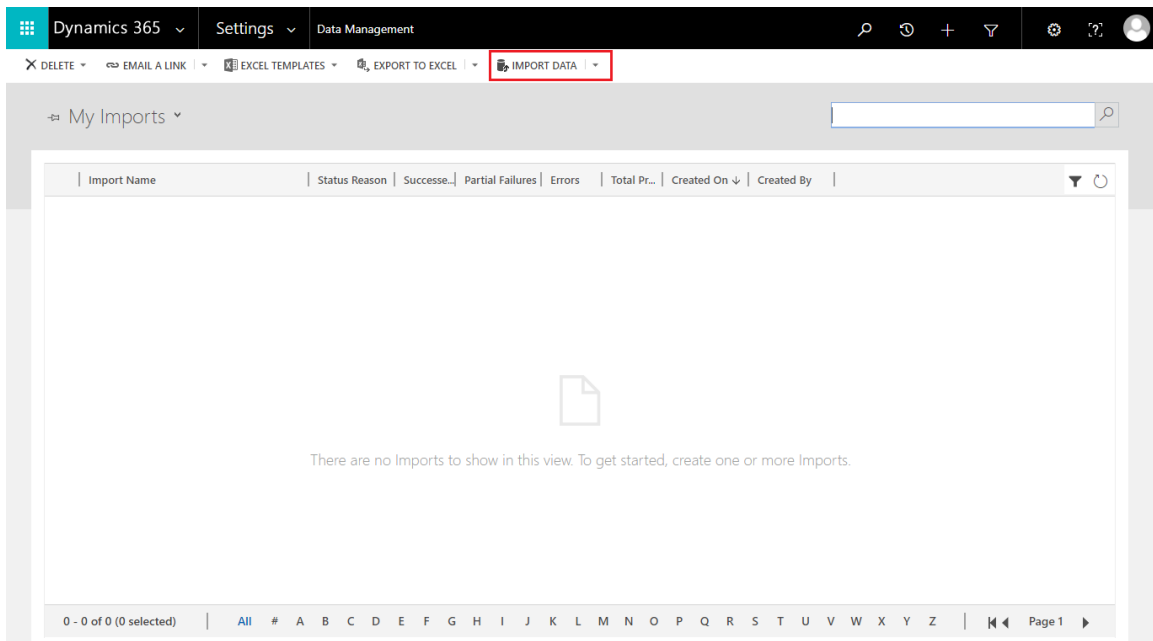
As part of the solution we are providing predefined set of Department and Sub-specialty data that are common for the current period. The user also has the option to add or update the data through user interface. Both has been explained below

3.3.1. Import Excel

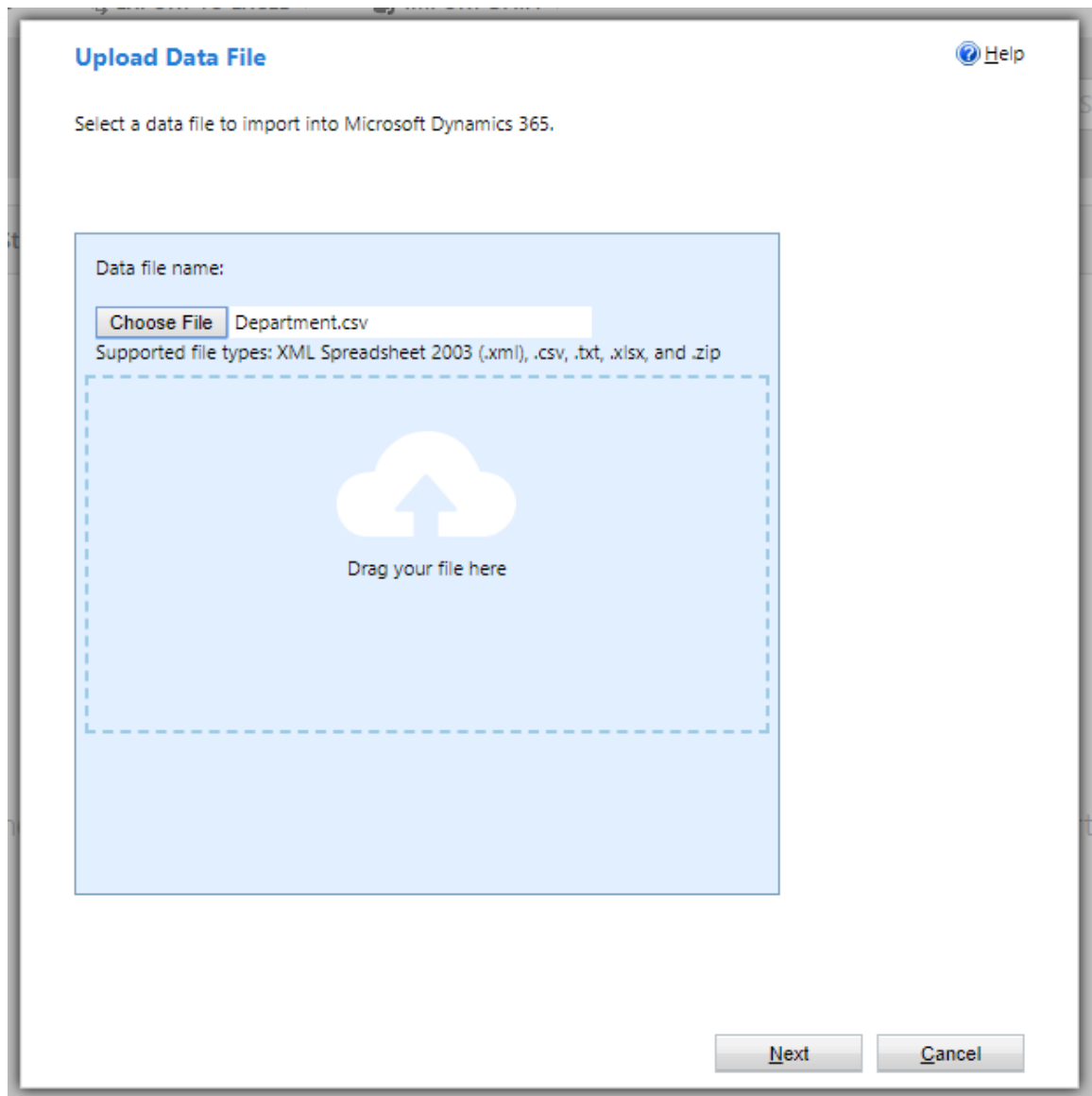
1. In your CRM environment, navigate to Settings > Data Management > Imports,



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:

[Choose File](#) Department.csv

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


Drag your file here


[Next](#) [Cancel](#)

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

Map Record Types [Help](#)

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 ▼

[Back](#) [Next](#) [Cancel](#)

5. 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

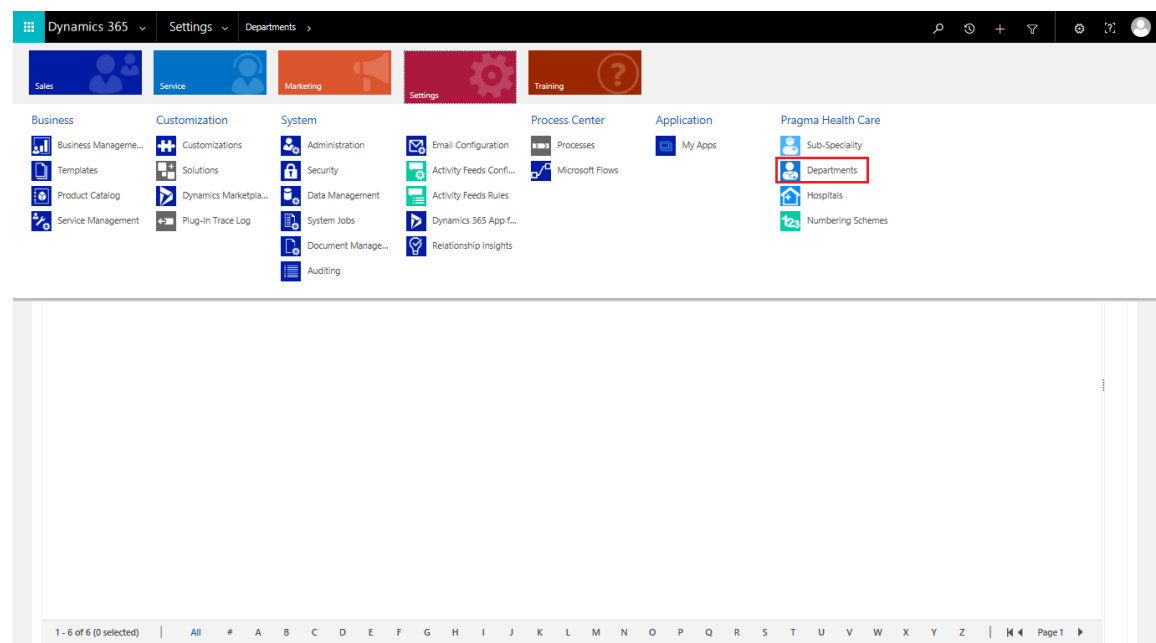
Import Name	Status Reason	Successes	Partial Failures	Errors	Total Processed	Created On	Created By
Sub-Specialty.csv	Completed	237	0	0	237	27-03-2018 1...	harshal shinde
Department.csv	Completed	193	0	0	193	27-03-2018 1...	harshal shinde

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

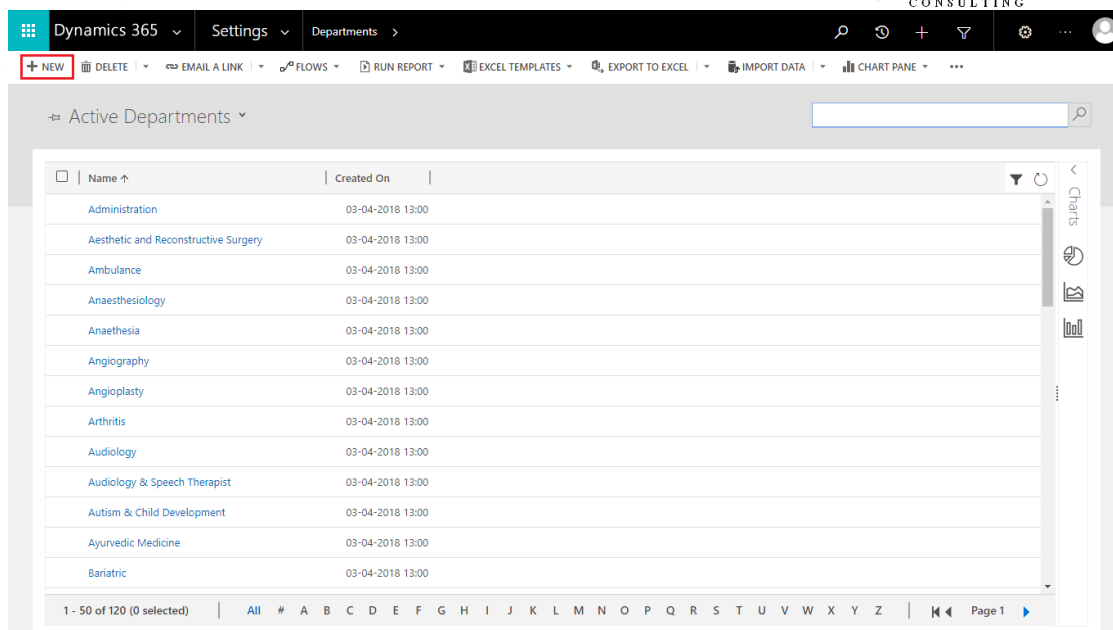
- Follow the same procedure for importing Sub-Speciality Data.

3.3.2. Create Department and Sub-Specialty

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



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



Dynamic 365 Settings Departments

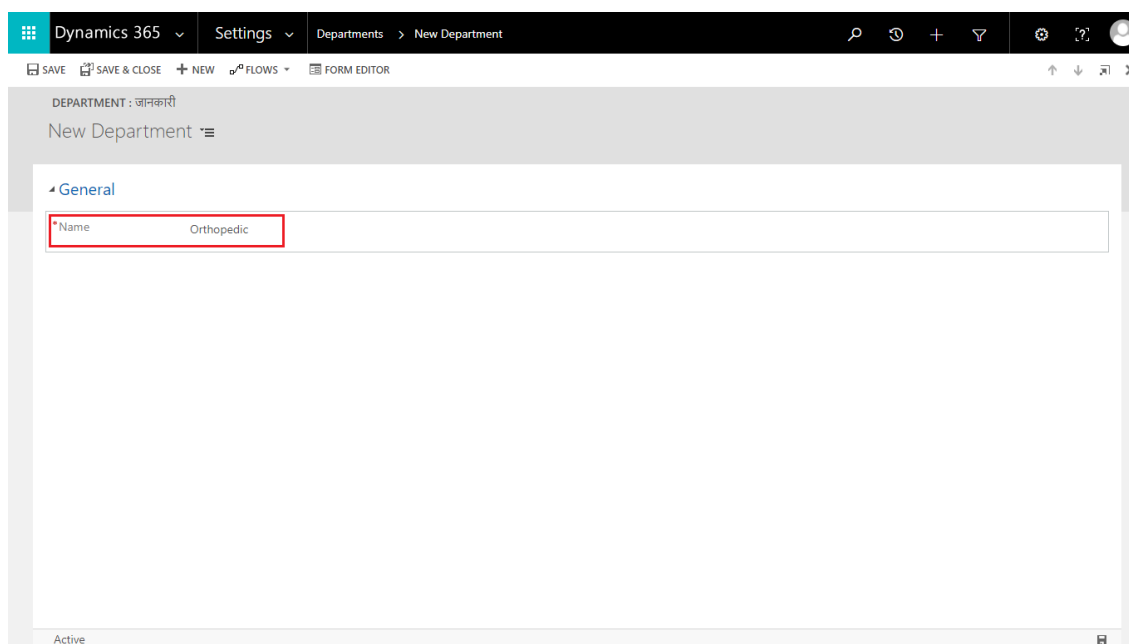
NEW DELETE EMAIL A LINK FLOWS RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA CHART PANE

Active Departments

Name	Created On
Administration	03-04-2018 13:00
Aesthetic and Reconstructive Surgery	03-04-2018 13:00
Ambulance	03-04-2018 13:00
Anaesthesiology	03-04-2018 13:00
Anaesthesia	03-04-2018 13:00
Angiography	03-04-2018 13:00
Angioplasty	03-04-2018 13:00
Arthritis	03-04-2018 13:00
Audiology	03-04-2018 13:00
Audiology & Speech Therapist	03-04-2018 13:00
Autism & Child Development	03-04-2018 13:00
Ayurvedic Medicine	03-04-2018 13:00
Bariatric	03-04-2018 13:00

1 - 50 of 120 (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

3. Enter Department name and save the Department.



Dynamic 365 Settings Departments New Department

SAVE SAVE & CLOSE NEW FLOWS FORM EDITOR

DEPARTMENT : जानकारी

New Department

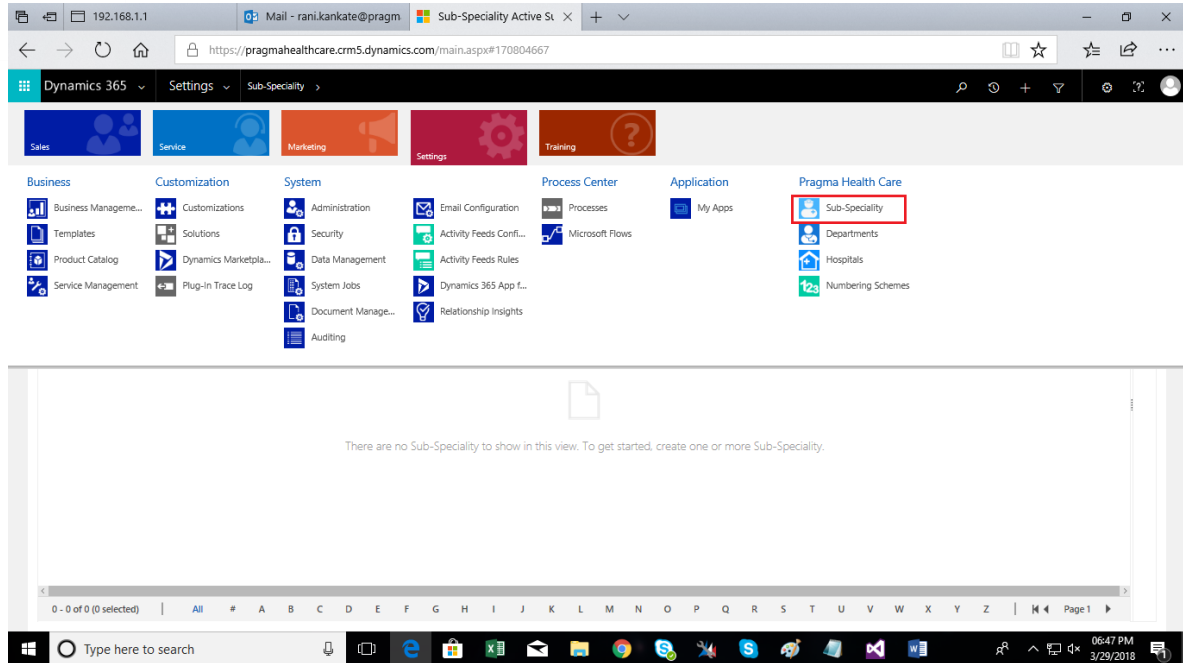
General

*Name Orthopedic

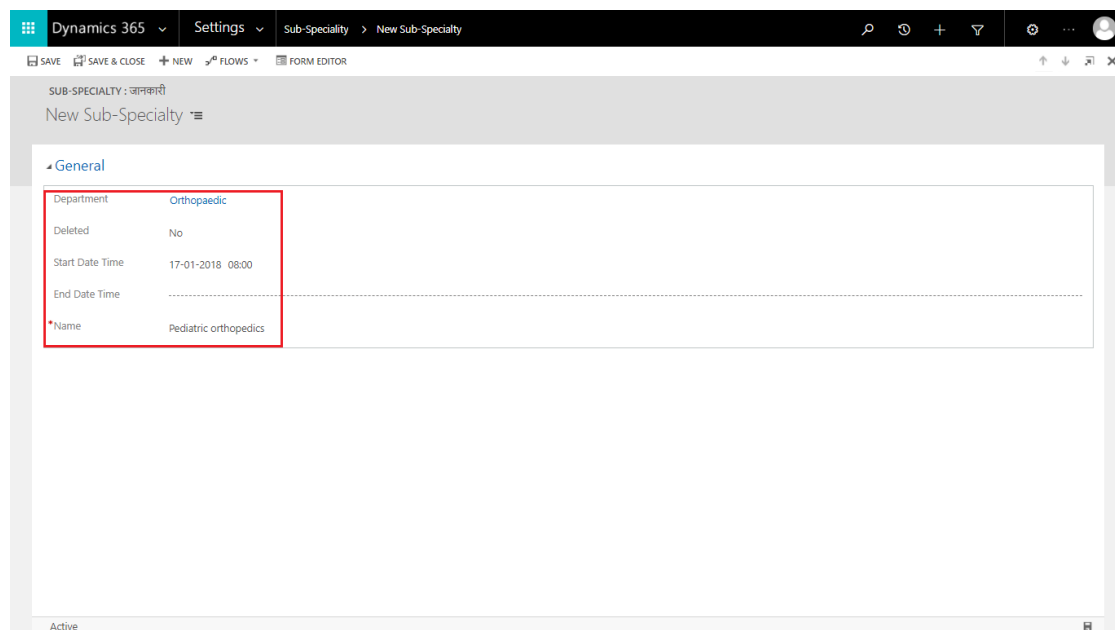
Active

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.

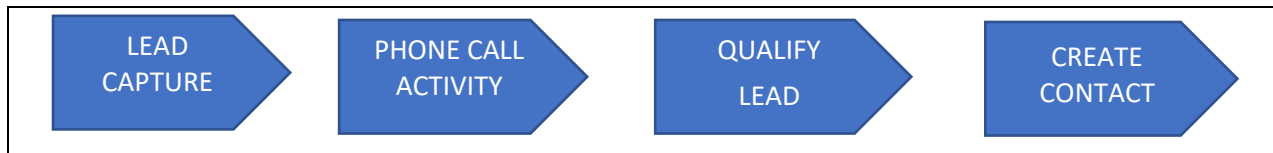
3	Start Date Time	Specify the Start Date time of this Specialty in Hospital.
4	End Date Time	Specify from when this Specialty is not available in the Hospital. When end date of Specialty is selected update deleted field to yes.
5	Name	Specify the name of Sub-Specialty

4. Pragma Heath Care Flow

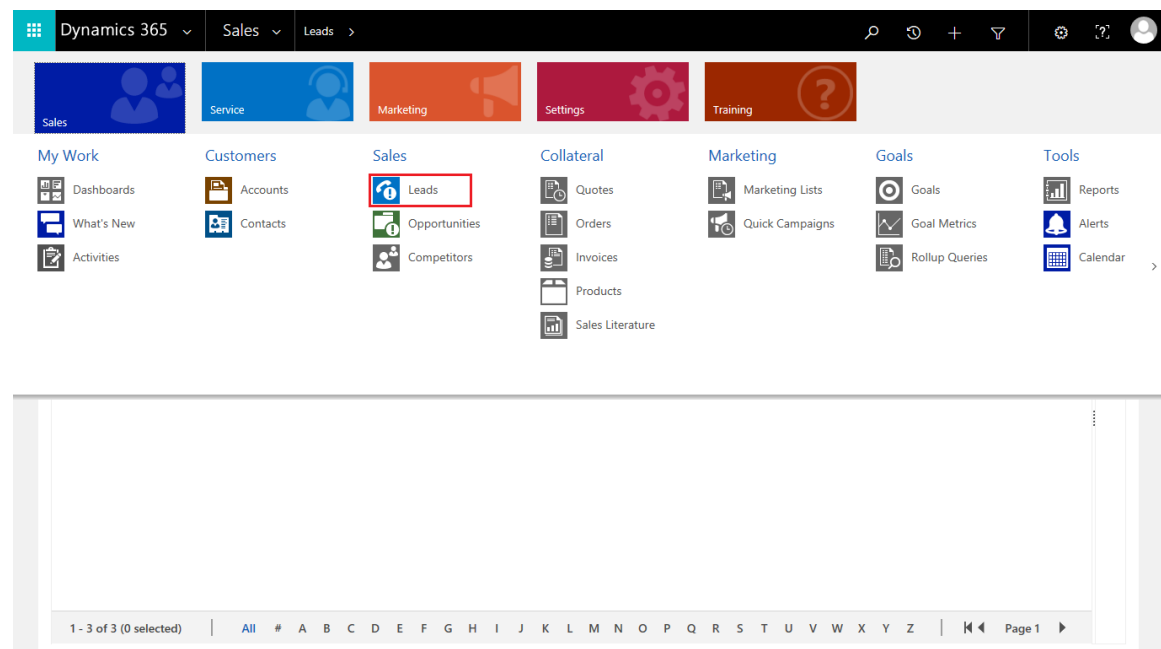
The process flow of Pragma Heath Care is as below:

- 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 Heath 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
<p>*First Name: Nitin</p> <p>*Last Name: Ramapure</p> <p>*Mobile Phone: 8901345798</p> <p>Alternate Phone Number: 907609187</p> <p>Email: nitin.ramapure@pragmasys.in</p> <p>Gender: Male</p> <p>Age: 30</p> <p>Existing Patient:</p> <p>Doctor's Name:</p> <p>Billing Types: Cash</p> <p>Remarks:</p>	<p>*Title: Teeth Pain</p> <p>Lead Description:</p> <p>Hospital Details</p> <p>Hospital: Deenanath Mangeshkar Hospital</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>
<p>Address Details</p> <p>Street 1:</p> <p>Street 2:</p> <p>Street 3:</p>		<p>Administration</p> <p>Modified On: 06-04-2018 11:47</p> <p>Modified By: Rani Kankate</p> <p>Created On: 06-04-2018 11:22</p> <p>Created By: Rani Kankate</p>

Open

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

ADD NEW ACTIVITY | ADD EXISTING ACTIVITY | BULK DELETE | CHART PANE | RUN REPORT | EXCEL TEMPLATES | EXPORT ACTIVITIES | TRACK EMAILS BY FOLDER

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

Open

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

2 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

Open

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

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 3

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

Description: Not Interested, Call Back Later, Not Picking, Not Reachable (1)

Regarding: Nitin Ramapure

Duration: Next Followup Date: 12-04-2018 10:30 (2)

Open unsaved changes

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

New Phone Call

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

6. 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

Basic Information	Description	Lead Details
<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>*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>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

7. 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
<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>Billing Types: Cash</p> <p>Remarks:</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>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>

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**

Dashboards
 What's New
 Activities

Accounts
Contacts

Leads
 Opportunities
 Competitors

Quotes
 Orders
 Invoices
 Products
 Sales Literature

Marketing Lists
 Quick Campaigns

Goals
 Goal Metrics
 Rollup Queries

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	
Business Phone	
*Mobile Phone	8901345798
Email	nitin.ramapure@pragmasys.in
Home Phone	9076409187

Address	
Address 1: Street 1	
Address 1: Street 2	
Address 1: Street 3	
Address 1: City	
Address 1: State/Province	
Address 1: County	
Address 1: ZIP/Postal	

Active

POSTS ACTIVITIES NOTES

All Add Phone Call

Nitin Sharma
Modified by Rani Kankate
19-03-2018 18:29

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

Search for records

<input type="checkbox"/>	Full Name ↑	Email	Mobile Phone	Patient ID	Gender
<input type="checkbox"/>	Ketal Singh	ketal.singh@test.com	8976543010	PA0001	Female
<input type="checkbox"/>	Mitali Shaha	mitali.shaha@test.com	8976509456	PA0003	Female
<input type="checkbox"/>	Nitin Ramapure	nitin.ramapure@prag...	8901345798	PA0002	Male
<input type="checkbox"/>	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

<input type="checkbox"/>	Full Name ↑	Email	Mobile Phone	Designation	Speciality
<input type="checkbox"/>	Dr. Aditya Tripathi	Adityatripathi@gmail.c...	8652414785	Doctor	Neurology
<input type="checkbox"/>	Dr. Neha Agrawal	neha.arawal@test.com	9883456781	Dentist	Dentistry
<input type="checkbox"/>	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

<input type="checkbox"/>	Full Name ↑	Email	Mobile Phone	Designation	Speciality
<input type="checkbox"/>	Dr. Aditya Tripathi	Adityatripathi@gmail.c...	8652414785	Doctor	
<input type="checkbox"/>	Dr. Neha Agrawal	neha.arawal@test.com	9883456781	Dentist	
<input type="checkbox"/>	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.

Dynamics 365 Sales Contacts > New Contact

SAVE SAVE & CLOSE NEW FORM FLOWS

CONTACT : ACTIVE DOCTORS New Contact

*Owner Rani Kankate

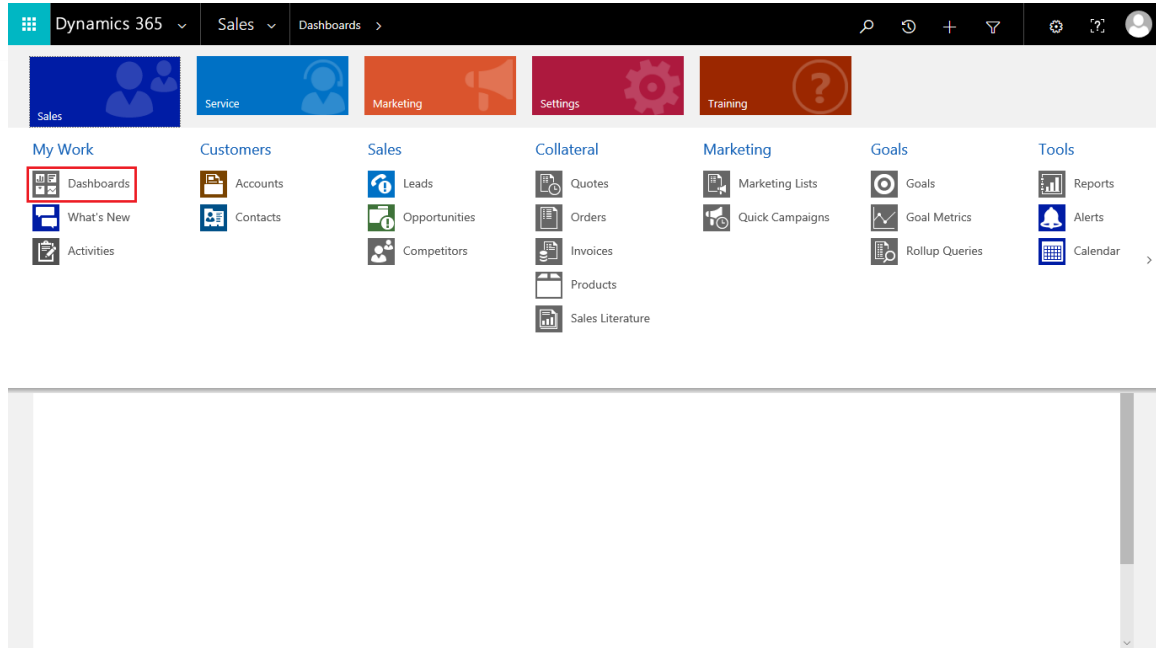
Summary

CONTACT INFORMATION	Contact Details	Address
*Full Name Dr.Kirti Chohan	Preferred Method of Contact Any	Street 1
Contact Type Doctor	Business Phone 9876460912	Street 2
Age 37	*Mobile Phone 9678983689	Street 3
Gender Female	Email	City
Birthdate	Home Phone	State/Province
Designation Doctor		ZIP/Postal Code
Speciality Neonatologist		County

Active

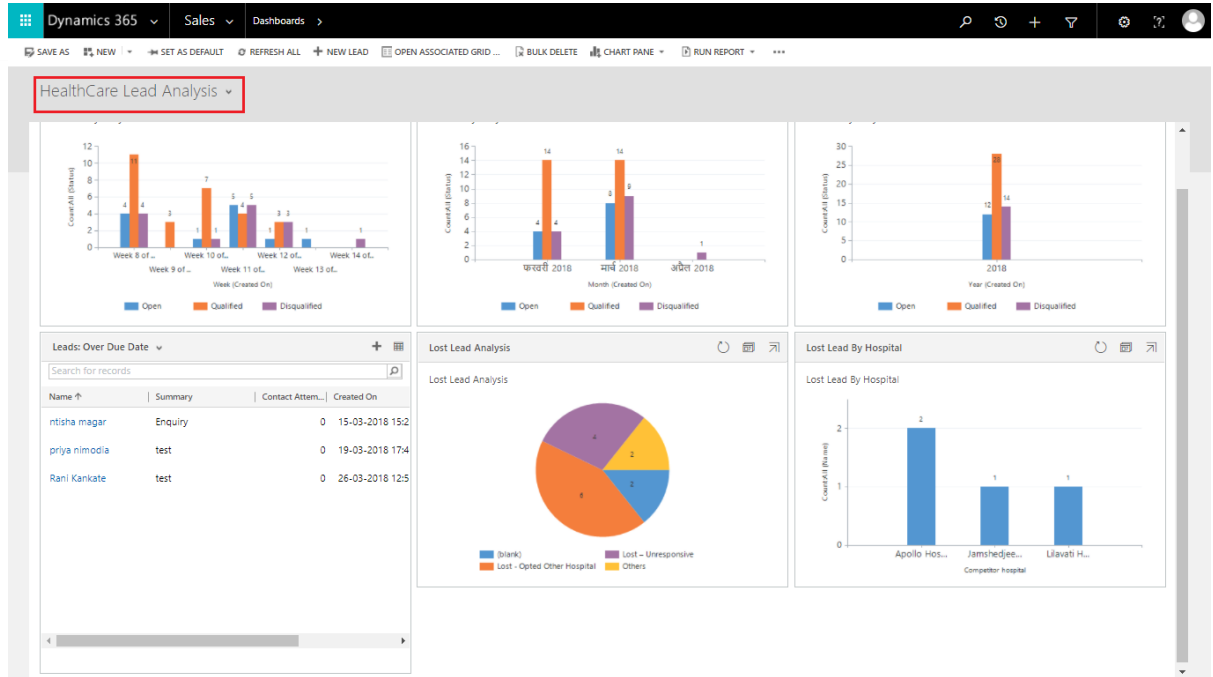
No.	Field	Description
1	Full Name	Enter first name and last name of doctor. last name is Mandatory.
2	Contact Type	Select contact type. 1.Doctor: contact is doctor. 2. Patient: contact is patient.
3	Age	Enter age of doctor.
4	Gender	Specify Gender. 1.Male 2. Female 3. Other
5	Birth Date	Enter birth date 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.



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.