



Insulin Delivery Innovator

# A month of manual work. Now done in minutes — without leaving the CRM.

## 15 days

→ MINUTES FOR MDR SUBMISSION

## D365

CRM  
INTEGRATION VIA  
API

## Auto

COMPLAINT FROM  
CRM CASE

## 0

MANUAL  
PROMPTS  
REQUIRED

### About the customer

An international diabetes technology innovator specializing in insulin delivery systems. Their support team processed large volumes of unstructured complaint data daily through a manual CRM system with no AI integration, no smart functionality, and no automated pathway from service case to regulatory submission. What should have taken minutes consumed a month of work.

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| Industry | Diabetes Technology / Insulin Delivery |
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| Pain point | Manual CRM, no automation |
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| Previous system | Microsoft Dynamics 365 |
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## Challenge

The company's support representatives spent most of their time on documentation — not on helping patients. Their Dynamics 365 CRM captured service cases, but **every step after that was manual**. Converting a case into a complaint, populating the complaint fields, running the investigation, generating the MDR — all of it required human effort at every handoff.

The result: complaint management that took a month of work per cycle, investigation delays that compounded as volume grew,

Platform

Salesforce + D365 API

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We'll walk you through Smarteeva with your use cases, your workflows, and your data.

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and a support team that couldn't scale without adding headcount.

- **Massive volume of unstructured manual data.** Support staff generated significant quantities of complaint data daily — but it arrived as unstructured notes, free-text descriptions, and case summaries. There was no automated way to convert this into structured complaint records.
- **Manual interdepartmental data sharing.** Data moved between departments by hand — copied, forwarded, re-entered. Every handoff created risk of missing information and duplicate records. The system that was supposed to track quality was introducing quality gaps.
- **No reporting or analytics.** The CRM lacked the ability to track current reporting updates, generate analytics, or provide visibility into complaint trends. The team was flying blind on volume, severity distribution, and closure timelines.
- **No integration for PMS reports or auto-population.** Without proper integration, the system couldn't support auto-generated PMS reports or data auto-population. Every report was assembled from scratch.
- **No automated investigation management.** Unoptimized workflows made automated investigation impossible. Every investigation started from a blank slate, with investigators manually gathering context that should have been connected to the complaint from the start.

*"Our support reps were spending more time documenting complaints than resolving patient issues. We needed the CRM they already used to connect directly to a*

*complaint system that could do the work for them."*

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## Approach

Smarteeva's approach was deliberately non-disruptive: don't replace the CRM the support team already uses — **connect to it**. The team knew Dynamics 365. They were productive in it. Ripping it out would slow them down. Instead, Smarteeva built an API bridge that lets the support team continue working in their CRM while complaint management, investigation, and regulatory reporting happen automatically on the Smarteeva side.

- **Keep the CRM, automate everything after it.** Support staff continue managing cases in Dynamics 365. When a case meets complaint criteria, Smarteeva creates the complaint record automatically — no copy-paste, no re-entry, no switching systems.
  - **Zero-prompt AI.** The AI shouldn't require the support team to learn prompt engineering. Smarteeva configured agents to run autonomously in the background — populating fields, generating summaries, triggering decision trees — without anyone typing a single prompt.
  - **From 15 days to minutes.** The MDR submission process that previously took 15 days needed to collapse to minutes. That meant automating every step: decision tree evaluation, report population, country detection, and regulatory submission — triggered automatically from the complaint, not initiated manually.
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# Solution

Smarteeva's complaint management system connects to the company's Dynamics 365 CRM via API — replacing manual processes with automation that delivers FDA-ready reports in minutes, all without disrupting the support team's existing workflow.

1

## API-connected CRM integration.

Smarteeva connects to Dynamics 365 via API, automating data exchange and replacing manual interdepartmental transfers. The support team manages cases in their CRM; Smarteeva handles everything that follows — complaint creation, investigation, and regulatory reporting.

2

**Automatic complaint creation from CRM cases.** The system autonomously evaluates case inputs and generates complaints without manual intervention. When a support case meets complaint criteria, the complaint record is created automatically — with fields populated from the case data.

3

**Auto-detect country, auto-generate regulatory reports.** The system detects the country from reported issues and instantly generates, populates, and submits the correct regulatory report — MDR, MIR, CVR, or ORR — based on jurisdiction. No manual routing. No guessing which form applies.

4

**MDR submission reduced from 15 days to minutes.** Complaint inputs automatically trigger decision tree analysis, which generates a fully populated MDR report within seconds. The entire process — including reportability evaluation — requires no

manual input. What used to take 15 days now takes minutes.

5

#### LLM-powered complaint summaries.

Using the support team's intake notes, a configured LLM automatically identifies required details and generates complaint summaries instantaneously. The quality team reviews a finished summary — not a pile of unstructured notes.

6

**Full case workflow in CRM, seamless transfer to Smarteeva.** Users manage entire case workflows within Dynamics 365, then data transfers seamlessly to Smarteeva for automatic complaint creation, investigation generation, and regulatory processing. No system-hopping required.

7

**Undo complaint feature.** Smarteeva includes the ability to cancel complaints if information was entered incorrectly or is incomplete — a practical safety net that gives the team confidence to work at speed without fear of irreversible errors.

## Results

**Where manual complaint management once required a month of work, Smarteeva now delivers FDA-ready reports in minutes** — all without disrupting the team's existing CRM workflows.

- 15 days → minutes for MDR submission. The full cycle — from complaint creation through decision tree evaluation to FDA-ready report — now completes in minutes. No manual input. No 15-day wait.
- Zero-prompt AI running in the background. Complaint fields are populated, summaries

are generated, and decision trees are triggered automatically. The support team doesn't interact with the AI directly — it works behind the scenes.

- **CRM workflow preserved.** The support team continues working in Dynamics 365. Nothing changed about their daily workflow. Everything changed about what happens after they close a case.
- **Duplicate and missing data risk eliminated.** Automated data transfer via API means no more manual copy-paste between departments. One source of truth from case through complaint through regulatory submission.
- **Investigation automation enabled.** Investigations that previously started from blank forms now start with pre-populated context from the case, the complaint, and similar prior records.

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## What's next

With CRM-to-complaint automation running and MDR submission reduced to minutes, the company is expanding Smarteeva across their post-market surveillance operation:

- Deploying Smarteeva Orchestra to build custom AI agents for adverse event detection and automated triage from CRM case notes
- Expanding automated PMS reporting — connecting complaint data with product registration for integrated PSUR and PMSR generation
- Building real-time analytics dashboards visible to both the support team (in D365) and the quality team (in Smarteeva)

- Extending the API integration to additional CRM modules and customer service channels

# Stuck between your CRM and your complaint system?

See how Smarteeva connects to Dynamics 365, Salesforce, or any CRM — and automates everything after the case is closed.

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