



## Case Study: CRM Online Deployment for PeakRx – A Compounding Pharmacy

### Requirement:

PeakRx ([www.mypeakrx.com](http://www.mypeakrx.com)) is a compounding pharmacy based out of Denver, CO with multiple locations in other states. PeakRx wanted to deploy a CRM solution that would allow them to:

1. Manage Patients, Doctors and Prescriptions in CRM.
2. A Doctor Portal for Doctors to view their Patients & Prescriptions.
3. A solution that would require minimal investments in onsite IT infrastructure.
4. A solution that can be deployed in phases with key items completed first.
5. A platform that can be customized to complex business requirements in the long run.

PeakRx approached CloudFronts for the above key requirements during the initial stages of their business setup. CloudFronts completed the 1<sup>st</sup> Phase through a QuickStart (provide link here) CRM deployment and deployed additional requirements over the course of the next few months. This allowed PeakRx to expand their CRM platform based on their business needs and on a timeline that worked for them!

Below are some key features of the PeakRx CRM deployment:

1. Managing Doctors, Patients & Prescriptions – Our team designed and deployed custom entities for Doctors, Patients, Prescriptions and other related entities. The PeakRx team was able to use CRM as the single platform with all their business information available in it.
2. Prescription Workflows – Our team worked with PeakRx management and continued to evolve the Prescription entity to accommodate complex business logic. Some examples of this are auto calculation of gross profit based on cost of goods sold and gross revenue, calculation of commissions, ability to lock the prescription when it has been 'dispensed'.
3. Doctor Portal – PeakRx wanted its Doctors to view Patient information and get updated reports on their Patients & related Prescriptions through a Doctor Portal. This portal had to have robust security and reliability. CloudFronts deployed a Doctor Portal connected to Microsoft CRM and hosted on Windows Azure (low IT foot print). All doctor membership was handled through our custom membership module in CRM and the Portal was setup with SSL encryption.
4. Shipping Integration – As the PeakRx business evolved, their team wanted to print Shipping labels directly from Microsoft CRM. PeakRx uses UPS ([link here](#)) as their primary Shipper. Our team worked with the UPS API platform and developed a robust integration that allowed the entire Shipping process to be completed from CRM. This included address validation, price comparison, shipping label printing to a Zebra printer and tracking information in CRM!
5. Payment processing – As PeakRx continued to derive benefits of using Microsoft CRM Online as an integrated business management platform, they wanted to further integrate key business operations into CRM. CloudFronts worked on PeakRx's Payment processing requirements and setup an integration to Mercury API ([link here](#)). The payment processing in CRM allowed PeakRx to accept payments directly from CRM along with other key features like partial payments and refund processing!
6. Reporting & BI – Our BI team worked with PeakRx Management to develop several business reports in CRM so the PeakRx team can run operations with 'data'.

We continue to engage with PeakRx for their CRM requirements as their business continues to grow. Contact Us Today to get started with your CRM Online requirement! [Click here.](#)