



Case Study

Mediscribes

A SugarCRM Customization

Our client, Mediscribes, was looking for a solution that would allow them to integrate all their sales and customer related activities into single centralized unit thereby increasing operational efficiency. Mediscribes were using multiple means to store and track such information and wanted to do away with the problems that arose from tracking activities and collating information from these multiple sources. They opted for SugarCRM to achieve this. Mediscribes approached Icreon to customize SugarCRM to reflect their business processes.

Customer Profile

Mediscribes Inc provides medical transcription services to hospitals, clinics, individual physicians across the United States.

Business Requirements

Mediscribes were using various disparate means for managing all business activities and data. These include the ACT! customer and contact management software, Google Docs as well as Excel and Word documents. As a result of which they were facing problems in collating data from the various sources also found it difficult to track employee activities. To do away with these problems, they decided to switch over to a web based solution that would allow them to store and manage data from a centralized location. Mediscribes opted for SugarCRM based on the ease with which it can be customized. Various modules of SugarCRM were required to be customized to map the business processes being followed at Mediscribes. The forms used to gather information pertaining to leads, accounts etc were required to be customized to include information specific to the medical transcriptions business. The ability to send and receive FAX directly from Sugar was required. An exhaustive project module was enabling the tracking of all necessary information and activities.

SugarCRM customization to streamline the operations of a medical transcription service provider

At Icreon, we customized the SugarCRM Community edition to enable it to manage the day-to-day functioning of a medical transcription firm.

Challenges:

In customizing SugarCRM the various challenges that we faced and overcame include the following:

- Customizing the project management module to match the features that are available in the Project Management module in SugarCRM Professional edition. All features and functionalities had to be coded from scratch

- Developing the team module and handling the team relationships with various entities of the application such as projects module, documents etc
- Configuring multiple e-mail addresses wherein cases are to be automatically routed to
- Document sharing between multiple users and teams

Technology Used:



Solution:

The following modules were customized in delivering the solution:

Opportunities: The opportunities module has been customized to allow for information gathered in a manner required by Mediscribes. The layout of the screen has also been customized to allow for a tabbed interface thereby reducing the length of the form.

The screenshot shows a web form titled 'Transcription Sales Info' with three tabs: 'Transcription Sales Info', 'Technical Info', and 'emPower Sales Info'. The 'Transcription Sales Info' tab is active. The form contains several fields:

- Transcription Process:** A dropdown menu with options: Inhouse, Outsource, Combination, Single Vendor, Multiple Vendor.
- Dispatch:** A dropdown menu with options: EMR Insert, E-transcribable, E-mail, FTP, Other.
- # of MTs w Supervisor:** A text input field.
- Avg. MT Pay:** A text input field with the value '0'.
- MT Benefits %:** A text input field with the value 'yes'.
- Annual Inhouse:** A dropdown menu with 'Lines' selected and an adjacent text input field.
- Annual Outsource:** A dropdown menu with 'Lines' selected and an adjacent text input field.
- Dictation System:** A text input field.
- Cost \$:** Three text input fields corresponding to the Annual Inhouse, Annual Outsource, and Dictation System categories.

Screenshot of the opportunities module

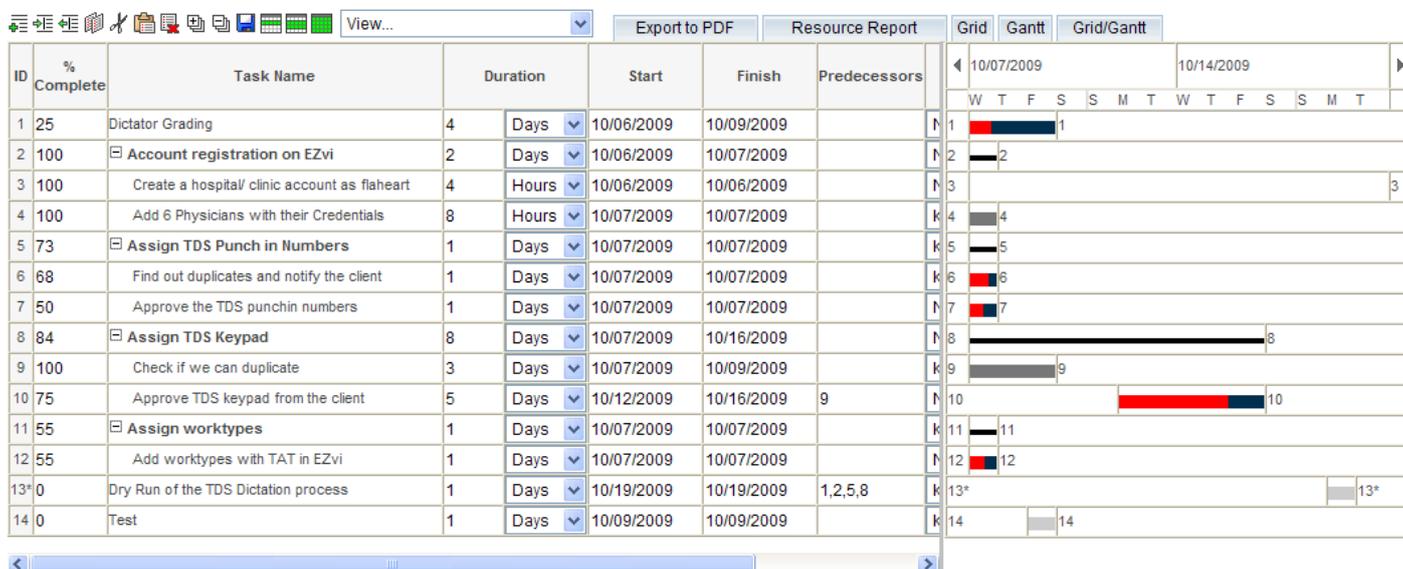
Accounts: Additional fields (pertaining to the medical transcriptions business) have been added to the form for creating an account in the system.

Contacts: This module has been customized to allow additional information such as projects, cases etc to be associated with a contact.

Projects: We have customized the Projects module to include the features that are available in the SugarCRM Professional edition. Projects can be created and assigned to a team. Members of the assigned team can access and manage the project details. All activities pertaining to the project such as scheduled calls/meetings, e-mails exchanged, documents attached, cases, bugs, related knowledge base articles, etc can be stored.

Common details of a project can be stored as a template. Users can then make use of a saved template to create a new project. Within a project multiple tasks can be created; each task can be assigned to a particular member of the project team.

A project dashboard has been provided allowing users to get a birds-eye view of the status of all projects assigned to them. Gantt charts are available for each project allowing the project manager to track and monitor the progress of the projects. Managers can also generate resource reports detailing the number of tasks done by members.



Screenshot of the Gantt chart used in the projects module

Documents: The documents module allows for a variety of documents to be uploaded to the system. Documents can be associated with projects, contacts etc and can be assigned to teams.

Agreements: An agreements module has been built allowing Mediscribes to create multiple quotes for the same products; with different prices in each.

Cases: This module is used by the Customer Care department at Mediscribes to handle customer requests and grievances. The requests or grievances along with their resolution details can be stored. We have configured multiple e-mails allowing for the routing of cases to specific teams.

Teams: Teams can be created and multiple employees can be assigned to each team. Teams allow for items (documents, etc) to be collectively assigned to all members of the team. We have built the teams module from scratch and integrated it with the SugarCRM community edition.

Survey: Users can create surveys that are specific to product categories. Each survey consists of a set of questions and answers that a customer is required to answer. E-mail invites can be sent out to customers inviting them to participate in a survey. The e-mail will contain a link to the questions that are associated with the survey. Answers to the questions will be available in the SugarCRM application.

Products: This module can be used to create and manage the details of products being offered by Mediscribes to their clients.

Knowledgebase: Articles can be uploaded to create a knowledgebase. Users can create articles and attached documents to it.

Fax Implementation: We have made use of the HylaFAX server to provide fax functionality within SugarCRM. Fax can be sent/received via e-mail. Mass faxing can also be carried out.

Search Enhancements: Search listing was enhanced to allow for the listing to be sorted by keyword relevance.

Holidays: An all new holidays module was built the system to maintain the details of the holidays taken by employees.

Reporting: The ZukerReports component was integrated with the solution to build custom reports.

