



Entrust Health Group – Case Study

Executive Summary

Entrust Health Group is a healthcare services organization that provides pharmacy management, patient care coordination, and prescription processing for law firms and clinics. As the company scaled, it needed a more efficient way to manage prescriptions, track deliveries, and streamline communication between multiple systems. Their team was spending excessive time switching between third-party platforms such as Liberty prescription software, UPS tracking, and other tools to locate and verify prescription data.

The Challenge

Before partnering with Cornerstone Solutions, Entrust Health Group's customer service representatives had to access multiple systems to locate prescription information, verify patient data, and confirm deliveries. This fragmented process resulted in wasted time, inconsistent data, and limited visibility across departments.

Their main objectives were to:

- Create a unified prescription management process within **Zoho CRM**.
- Integrate **Liberty Software**, **UPS**, and **Smarty Address Verification** for real-time synchronization.
- Automate status updates and delivery confirmations.
- Centralize data for reporting and analytics across all patient and prescription records.

Implementation

Prescription Module Development

Cornerstone Solutions built a dedicated **Prescription module** in Zoho CRM, designed to replace the complex sub-form structures previously used. This new module allowed Entrust's staff to

track prescriptions independently, linking them to patients, prescribers, clinics, and law firms. The system was structured to capture prescription-specific details, including status, delivery information, and verification fields.

Liberty API Integration

A custom **API integration** with Liberty Software was developed to synchronize prescription and patient records directly into Zoho CRM. Cornerstone built API receiver functions and webhook modules that automatically created or updated records in real time. These connections ensured that all prescription data—including prescriber details, order numbers, and fulfillment statuses—remained accurate and consistent across both systems.

UPS Delivery Tracking Integration

To streamline logistics tracking, Cornerstone developed a **UPS API integration** that automatically retrieved proof-of-delivery information and attached the PDFs directly to related prescription records. A custom logging system was also created to monitor delivery events, ensuring that staff could easily track shipment status without leaving Zoho CRM.

Smarty Address Verification

Using **Smarty's address verification API**, Cornerstone implemented an automated process to validate delivery addresses before orders were advanced to production. The team created both button-based and automated verification flows, preventing incomplete or invalid addresses from delaying shipments.

Data Migration and System Optimization

Large-scale data imports—spanning tens of thousands of patient, prescriber, and prescription records—were cleaned, reformatted, and restructured before being migrated into CRM. Custom functions ensured data consistency, while automation rules managed updates to related modules such as clinics and law firms.

Training and Documentation

Cornerstone provided Entrust's internal team with step-by-step instructional videos and written guides. Training covered daily workflows, prescription tracking, and best practices for handling data across connected systems.

Results

The integrated CRM environment transformed how Entrust Health Group managed prescriptions and patient interactions. Their support team now accesses all critical information—prescription details, delivery status, and address validation—within a single, centralized platform.

Key outcomes include:

- **Unified prescription management:** Reps can now access patient, prescription, and delivery data in one place.
- **Improved accuracy:** Address verification and data synchronization reduced manual entry errors.
- **Time savings:** Staff no longer switch between Liberty, UPS, and spreadsheets to find information.
- **Enhanced reporting:** CRM analytics and dashboards provide clear visibility into prescriptions, fulfillment timelines, and operational performance.

Entrust Health Group now operates with a scalable CRM foundation that streamlines workflow, enhances visibility, and supports continued growth in healthcare management.