Service Delivery Pages

RETAILMYMEDS

| How It Works | Data Upload | Client Dashboard

Overview

This document specifies **3 new pages** for the RetailMyMeds Wix site. These pages sit downstream of the qualification form (already spec'd in v2.1) and support Arica's post-qualification service delivery workflow.

The qualification form brings prospects in. These pages serve them after they qualify:

1. **How It Works** — Visual process overview showing the full service model

2. **Dispensing Data Upload** — Secure intake form for pharmacy dispensing data

3. **Client Dashboard** — Monthly performance reporting for active clients

None of these pages require API integration or custom backend code. They use standard Wix Forms, CMS collections, and Wix Automations. The analysis and reporting behind them is handled manually by Arica until volume justifies automation.

> **PLATFORM NOTE**
>
> These pages require **Wix Studio** (not Wix Harmony). Harmony does not support CMS collections, file upload fields, or member-gated pages. If the site is currently on Harmony, these pages will need to be built in Studio.

Page 1: How It Works

Slug: `/how-it-works`

A content-only page (no form) that walks prospects through Arica's complete service delivery model. This replaces a generic "services" page with a numbered process flow that builds credibility and sets expectations.

User-facing header: *See exactly what happens after you qualify.*

The 6-Step Process

STEP 1: TAKE THE QUALIFICATION ASSESSMENT

Icon suggestion: Clipboard / Form
What the user sees: Answer 10 quick questions about your pharmacy. Takes about 2 minutes. You'll receive a personalized scorecard showing your qualification grade and projected ROI.
Behind the scenes: Scoring engine computes Financial Fit (45%), Operational Readiness (30%), Market Urgency (25%). Generates PDF scorecard automatically.
Status: Already built — links to the qualification form page

STEP 2: SUBMIT YOUR DISPENSING DATA

Icon suggestion: Upload / Document
What the user sees: Provide a data export from your pharmacy management system. We'll use it to identify exactly which prescriptions are costing you money and how much.
Behind the scenes: Arica reviews the raw dispensing data. Accepted formats: PMS CSV export, DataQ PDF report, or manual entry assistance.
Status: Page 2 of this spec

STEP 3: FREED WORKING CAPITAL ANALYSIS

Icon suggestion: Chart / Dollar
What the user sees: We calculate exactly how much cash is tied up in prescriptions you're losing money on — and what happens to your bottom line when those scripts are routed to profitable channels.
Behind the scenes: Manual analysis by Arica using the dispensing data. Delivered as a branded PDF report within 5 business days of data receipt.
Status: Delivered as a PDF report (not a website feature)

STEP 4: OWNER PRESENTATION

Icon suggestion: Presentation / Screen

What the user sees: We present your personalized findings in a 30-minute call. You'll see your numbers, your options, and a clear implementation plan tailored to your pharmacy's situation.

Behind the scenes: PowerPoint deck with the pharmacy's actual numbers from the dispensing data analysis. Includes implementation timeline and projected savings by month.

Status: Delivered in-person or via video call

STEP 5: IMPLEMENTATION

Icon suggestion: Gear / Settings

What the user sees: Your onboarding plan is tailored to your qualification grade. Some pharmacies are ready to start immediately. Others need a pilot period. Either way, we meet you where you are.

Behind the scenes: Tiered implementation: Grade A gets fast-track onboarding (2–3 weeks). Grade B gets standard onboarding (3–4 weeks). Grade C gets a pilot program (4–6 weeks). Grade D gets a reassessment plan (90-day check-in).

Status: Managed by Arica

STEP 6: MONTHLY PERFORMANCE TRACKING

Icon suggestion: Trend / Graph

What the user sees: Every month, you see exactly how much you've saved, which prescriptions were routed, and what's coming next. No surprises.

Behind the scenes: Arica compiles month-over-month reports showing scripts routed, savings realized, cumulative ROI, and optimization recommendations.

Status: Page 3 of this spec

Tiered Implementation by Grade

Implementation approach varies by qualification grade. The grades come directly from the scoring engine (documented in the v2.1 spec). This table shows what each grade means for onboarding:

Grade	Label	Approach		Timeline	What Happens
A (≥ 80)	**Strong Fit**	Fast-Track boarding	On-	2–3 weeks	Full platform access within 2 weeks. Dedicated onboarding call, PMS integration support, first routing batch within 10 business days.

Grade	Label	Approach	Timeline	What Happens
B (≥ 65)	**Good Fit**	Standard On-boarding	3–4 weeks	Standard onboarding with gap identification. May need PMS configuration or staff training before first routing batch.
C (≥ 50)	**Conditional Fit**	Pilot Program	4–6 weeks	30-day pilot period with close monitoring. Limited routing volume to validate savings before full rollout.
D (< 50)	**Not Recommended (Now)**	Reassessment Plan	90-day check-in	Educational resources and quarterly reassessment. The pharmacy may need operational changes before RetailMyMeds is a good fit.

Design Notes

- Visual numbered timeline or vertical process flow

- Each step is a card or section with icon, title, and 2–3 sentences of user-facing copy

- CTA at the bottom: "Start Your Assessment" linking to the qualification form

- Mobile: steps stack vertically, one per scroll section

- No form elements — purely content and layout

- Estimated effort: **2–3 hours**

Page 2: Dispensing Data Upload

Slug: `/upload`

After a pharmacy qualifies via the scorecard, Arica needs their actual dispensing data to perform the Freed Working Capital analysis. This page provides a secure intake point.

User-facing header: *Upload your dispensing data to start your analysis.*

Accepted Data Formats

> ### PMS CSV EXPORT
> Export from your pharmacy management system. Most PMS platforms (PioneerRx, Liberty, PrimeRx, Rx30, BestRx, QS/1, Computer-Rx) can generate a dispensing history CSV.

> ### DATAQ REPORT
> Standard DataQ dispensing analysis report. If your pharmacy subscribes to NCPDP DataQ, this is the preferred format.

> ### MANUAL ENTRY (ALTERNATIVE)
> If you can't export from your PMS, select "I need help exporting" and we'll walk you through it on a call.

Form Fields

Field	Type	Options	Req.	Backend Mapping
Pharmacy Name	Text input	Free text	Yes	`pharmacy_name` Links to ScorecardSubmissions if pharmacy exists
Owner Name	Text input	Free text	Yes	`owner_name` Direct text value
Email	Email input	—	Yes	`email` Confirmation email sent here
Phone	Phone input	—	No	`phone` Follow-up contact

Field	Type	Options	Req.	Backend Mapping
PMS System	Dropdown	PioneerRx / Liberty Software / PrimeRx / Rx30 / BestRx / QS/1 / Computer-Rx / Other	Yes	`pms_system` Determines expected export format
Data Format	Dropdown	CSV export from PMS / DataQ PDF report / Other electronic format / I need help exporting	Yes	`data_format` Routes to correct analysis workflow
Date Range of Data	Dropdown	Last 30 days / Last 90 days / Last 6 months / Last 12 months / Other	Yes	`date_range` Determines analysis scope; 90 days recommended minimum
File Upload	File upload	Accepts .csv, .xlsx, .pdf (max 25 MB)	Conditional	`uploaded_file` Stored in Wix Media Manager, linked to CMS entry. Not required if "I need help exporting" selected.
Notes	Text area	Free text (multi-line)	No	`notes` Direct text value
Data Consent	Checkbox	"I authorize RetailMyMeds to analyze this dispensing data for the purpose of identifying cost-saving opportunities for my pharmacy."	Yes	`consent_given` Must be true to submit. Timestamp recorded automatically.

After Submission

<div>

CONFIRMATION SCREEN

Thank you, [Name]. Your dispensing data has been received.
Arica will review your data and prepare your Freed Working Capital analysis within **5 business days**. You'll receive it at [email].
If you selected "I need help exporting," we'll reach out within 24 hours to walk you through the process.

</div>

Wix Automation

> **EMAIL NOTIFICATION TO ARICA**
>
> Set up a Wix Automation triggered on new DataUploads submission. The automation sends an email notification to Arica with the pharmacy name, owner name, email, and data format. No code required — this is a standard Wix Automations workflow (Trigger: Form Submitted → Action: Send Email).

CMS Collection: `DataUploads`

Field	Type	Notes
`_id`	Text	Auto-generated by Wix
`pharmacyName`	Text	From form
`ownerName`	Text	From form
`email`	Text	From form
`phone`	Text	From form (optional)
`pmsSystem`	Text	Dropdown value
`dataFormat`	Text	Dropdown value
`dateRange`	Text	Dropdown value
`uploadedFile`	Document	Wix Media Manager reference
`notes`	Rich Text	Free text
`consentGiven`	Boolean	Must be true
`consentTimestamp`	Date and Time	Auto-set on submit
`status`	Text	Received / Under Review / Analysis Complete / Delivered
`submittedAt`	Date and Time	Auto-set
`analysisDeliveredAt`	Date and Time	Updated manually by Arica when report is sent

Design Notes

- Single-page form (not multi-step — simpler than the qualification form)

- Data requirements section above the form explains what to upload and accepted formats

- File upload field should support drag-and-drop

- Consent checkbox must be prominent and clearly worded

- Mobile: all fields stack vertically, file upload works from phone camera roll or file picker

- Estimated effort: **3–4 hours**

Page 3: Client Dashboard

Slug: `/dashboard`

A monthly reporting landing page for active clients after implementation. Shows performance metrics, savings trends, and Arica's monthly recommendations.

User-facing header: *Your RetailMyMeds Performance*

Dashboard Sections

CURRENT MONTH SUMMARY

Layout: 3–4 metric cards in a row

- **Prescriptions Routed** (—) — Total scripts routed this month
- **Savings This Month** ($—) — Estimated cash preserved by routing
- **Cumulative Savings** ($—) — Total savings since onboarding
- **ROI** (—x) — Return on $275/month subscription

MONTH-OVER-MONTH TREND

Layout: Bar chart or line chart
Shows savings trend for the last 3–6 months. Initially a static image uploaded by Arica each month. Could be replaced with a Wix chart element connected to CMS data in Phase 2.

ROUTING SUMMARY

Layout: Table or card grid
Top drugs routed this month with per-drug savings. Columns: Drug Name, Fills Routed, Loss Avoided, Mail-Order Partner. Static table updated monthly.

RECOMMENDATIONS

Layout: Insight box / rich text block
Arica's monthly recommendation based on the data. Could include new drugs to consider routing, PMS optimization tips, or market updates affecting the pharmacy.

NEXT STEPS

Layout: Checklist or bullet list
Action items for the coming month. Updated by Arica as part of the monthly reporting cycle.

Access Control

OPTION A: PASSWORD-PROTECTED PAGE (RECOMMENDED)

Arica sends each client a unique URL and password. Simplest to set up. Best for fewer than 5–10 active clients.

OPTION B: WIX MEMBERS AREA

Each client creates an account and sees only their data. Requires a Wix plan that supports Members Area (Business plan or higher). Better for 10+ active clients.

CMS Collection: `ClientDashboards`

Field	Type	Notes
`_id`	Text	Auto-generated
`pharmacyName`	Text	Client pharmacy name
`reportMonth`	Text	e.g., "February 2026"
`rxRouted`	Number	Prescriptions routed this month
`savingsThisMonth`	Number	Dollar savings this month
`cumulativeSavings`	Number	Total savings to date
`roiMultiple`	Number	savingsThisMonth / $275 subscription
`routingSummary`	Rich Text	Drug-level routing details (table format)
`recommendations`	Rich Text	Arica's monthly notes
`nextSteps`	Rich Text	Action items for coming month

Field	Type	Notes
trendChartImage	Image	Uploaded chart image (Phase 1: static)
publishedAt	Date and Time	When the report becomes visible to client

Design Notes

- Clean, dashboard-style layout with metric cards at top

- Avoid clutter — this is a monthly check-in, not a real-time analytics dashboard

- Mobile: metric cards stack 2×2, chart scrolls horizontally if needed

- Phase 1: Arica manually updates CMS fields each month (10–15 minutes per client)

- Phase 2 aspiration: connect to a database for real-time metrics once client volume justifies automation

- Estimated effort: **2–4 hours**

Design Notes for Kevin

Wix Studio Requirement

- All three pages require Wix Studio (not Harmony)
- Page 2 uses Wix Forms (built-in, no Velo code)
- Page 3 uses CMS dynamic pages or Members Area (both built-in, no Velo code)
- No custom JavaScript or Velo modules needed for any of these pages

Visual Consistency

- Match the existing site's typography, colors, and spacing
- Use the same button styles and form field styles as the qualification form
- Process flow on Page 1 should feel like a premium consulting experience, not a generic steps section

Mobile

- All pages must work on mobile — pharmacy owners will access from the store
- File upload on Page 2 should work from phone file picker / camera roll
- Dashboard metric cards on Page 3 should stack cleanly on small screens

Navigation

- Add all three pages to the site's main navigation or a "For Pharmacies'' dropdown
- Qualification form should link to How It Works (and vice versa)
- Scorecard delivery email should include a link to the Data Upload page as the next step

Effort Summary

Page	Type	Effort	Complexity
How It Works	Content / Layout	2–3 hours	Low
Dispensing Data Upload	Form + CMS + Automation	3–4 hours	Medium

Page	Type	Effort	Complexity
Client Dashboard	Layout + CMS + Access Control	2–4 hours	Medium
Total		**7–11 hours**	