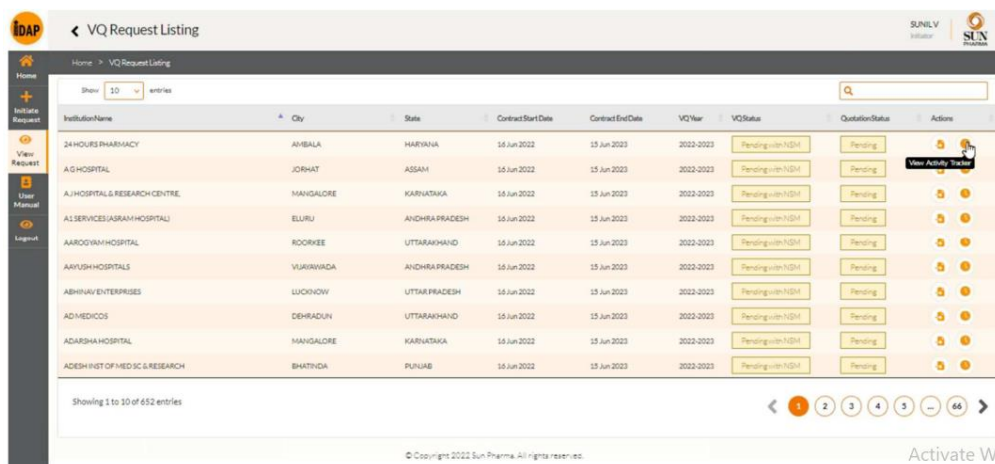


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Existing Concept :	N/A
Proposed Change:	<p>1. <b>Add two more level in existing workflow of VQ (Initiator &gt;&gt; <b>Regional Sales Manager (RSM)</b> &gt;&gt; <b>Zonal Sales Manager (ZSM)</b> &gt;&gt; <b>National Sales Manager (NSM)</b> &gt;&gt; <b>Business Unit Head (SBU)</b> &gt;&gt; <b>Group Business Head (GRP)</b> &gt;&gt; <b>Cluster Head (Cluster)</b></b></p> <p>a) <b>Agreed Solution Approach:</b> Match the station code of users as well as customers to link them. Match division code of users as well as items to link them.</p> <p>b) <b>Sourcing:</b> Hierarchy of RSM to Cluster Head level should consider from "ORG_STRUCTURE" and currently maintained in iDAP DB separately.</p> <p>c) <b>Expected Output / Desired Result:</b> List of counters in inbox of RSM and ZSM users according to their region/zone and division/s. Further process will be same as NSM.</p> <p>d) <b>Validation Check:</b> System should not forward or hop the workflow at next step in case of VACANT POSITION at any level just like current working scenario of iDAP.</p> <p>e) <b>Configurable no. of days in hopping of workflow.</b> Screen to be given to admin [Instra HO team]</p> <p>2. <b>Provision to add New Product with discount details to all VQ or partial VQ at re-initiation stage</b></p> <p>a) <b>Agreed Solution Approach:</b> Get active item from item mater in dropdown list which will get reinitiated. Get unique counters from iDAP VQ table. Dropdown List of counters should contain only those counters which are currently not active / not approved / not initiated for this new product in IDAP workflow.</p> <p>b) <b>Expected Output / Desired Result:</b> New screen for Initiator to select new product from dropdown List. Then able to select <b>single or multiple or all counters</b> as per requirement and forward it to next steps of workflows:</p> <p>c) <b>Add to all counters irrespective of approval stage.</b></p> <div data-bbox="458 1337 1457 1798" data-label="Table">  <p>The screenshot shows the 'VQ Request Listing' page in the iDAP system. It features a table with columns: InstitutionName, City, State, Contract Start Date, Contract End Date, VQ Year, VQ Status, Quotation Status, and Actions. The table lists various institutions like 24 HOURS PHARMACY, A/HOSPITAL, and A/HOSPITAL &amp; RESEARCH CENTRE. The 'VQ Status' column shows 'Pending with NDM' and the 'Quotation Status' shows 'Pending'. There are buttons for 'View Request', 'User Manual', and 'Logout' on the left sidebar. At the bottom, there is a pagination bar showing 'Showing 1 to 10 of 652 entries'.</p> </div> <p>3. <b>Provision to add new Pack to all VQ counters:</b></p> <p>a. <b>Agreed Solution Approach:</b> Get active item from item mater in both the dropdown list. Get unique counters from iDAP header table. Insert/copied header and detail record/s of these selected (single/multiple/ all) counters from selected "Copy from" item to selected "Copy To" item. No approval needed of any level.</p>

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- b. **Expected Output / Desired Result:** New screen for Initiator to select new pack size product from dropdown List (Copy to). Another dropdown list (Copy from) to select existing product.
- c. **Anticipated condition & solution:** No implication on existing records due to this addition.

#### 4. Provision to add newly introduced counter (Hospital) for VQ in middle of cycle

- a. **Agreed Solution Approach:** Initiation should be done for selected counter with all active items & with default discount %. Then forward the workflow to all approver users for final discount %.
- b. **Expected Output / Desired Result:** New screen for Initiator to select customer from dropdown List.
- c. **Validation Check:** Initiator should get only newly added counters in dropdown.
- d. **Need an option to copy from one VQ to another**

#### 5. Provision to delete the existing VQ (if it is deactivated or converted to RFQ/OTHER)

- a) **Agreed Solution Approach:** Fetch existing counters from iDAP, on click of delete button and user confirmation, all the records related to selected **counter** from all the iDAP tables, staging tables and metis/sap tables should get deleted.
- b) **Validation Check:** Should get only existing counters of iDAP from dropdown to select.
- c) **Anticipated Condition & Solution:** Existing records will be deleted permanently due to this and can't revert.
- d) **Expected Output / Desired Result:** New screen to select counter from dropdown list to be deleted. Expected confirmation message is "Are you sure, you want to delete this counter permanently from iDAP?" and notification email to all respective users should get notified through email after deleting the selected counter by initiator.

#### 6. Provision to read only access for INSTRA Field team (FLM, SLM & TLM) & Distribution team:

- a) **Agreed Solution Approach:** Match station columns of INSTRA POC users as well as counters to link them.
- b) **Validation Check:** Read only access of respective counters to INSTRA POC as per area, region & zone. Read only access of all counters to Distribution Team.
- c) **Sourcing:** INSTRA POC list & Distribution users list from master tables of Metis system.
- d) **Expected Output / Desired Result:** INSTRA POC users and Distribution Team users should be able to view screens same as Initiator.

#### 7. In Email subject to POC-INSTRAs, Add hospital code & Name in subject line:

- a) **Expected Output / Desired Result:** Send quotation mail with counter code and name in its subject line like we have included in mail body and the following is sample:

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From: IDAP MAIL [mailto:ldap@sunpharma.com]  
 Sent: Wednesday, March 1, 2023 10:10 AM  
 To: VIVEK GUPTA3 <vivek.gupta3@sunpharma.com>  
 Cc: MUNMUN SINHA <munmun.sinha@sunpharma.com>; RAJNEESH SHARMA <RAJNEESH.SHARMA@SUNPHARMA.COM>; IDAP INSTRAL <IDAP.INSTRAL@sunpharma.com>  
 Subject: IDAP Quotation Mail

Dear ,  
 IDAP VQ process for 2022-2023 has been Completed and ready to share VQ to SARVODAYA MULTISPECIALITY HOSPITAL. Kindly find attached cover letter and price sheet.  
 For support , please mail to IDAP.INSTRAL@sunpharma.com  
 IDAP Help Desk,  
 Sun Pharma

## 8. If there is no product for revision from SPIL\SPLL than blank sheet should not be sent to POC in quotation email while re-initiation of VQ:

- Expected Output / Desired Result:** Send quotation mail with appropriate covering letters and price sheets.
- Validation Check:** If no items are revised for any category i.e. SPIL or SPLL, then respective covering letter as well as price sheet should not send in email.

## 9. Revision no. (already there in covering letters, add in excel sheets too)- Need to display in price list & "Date" should be contract start date in pricelist excel file and not current system date:

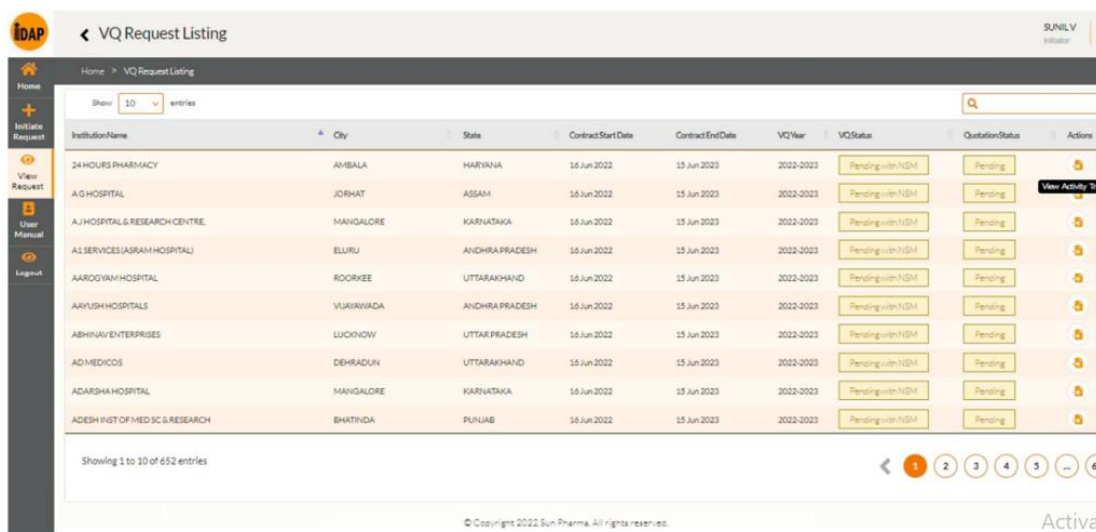
- Expected Output / Desired Result:** Send quotation mail with appropriate revision number in covering letters as well as in price sheets. Start date of the contract should have display in excel price sheet instead of current date in "Date" cell value.

	A	B	C	D	E	F	G	H	I
1	SUN PHARMACEUTICAL INDUSTRIES								
2	SUN HOUSE, PLOT NO.201 B/1 , WESTERN EXPRESS HIGHWAY				Date	01/03/2023			
3	GOREGAON (E) - MUMBAI - 400063				Valid Upto	31/03/2023			
4	Phone: 022-43244324 Fax: 022-43244343								
5	QUOTATION TO SARVODAYA MULTISPECIALITY HOSPITAL, SARVODAYA MULTISPECIALITY & , CANCER HOSP,OPP RED CROSS , HISSAR								
6	METIS CODE	BRAND NAME	HSN CODE	APPLICABLE GST	COMPOSITION	TYPE	DIVNAME	PACK	RATE TO HOSPITAL (EXCL. OF GST)
7									
8									
9									
10									
11									
12									
13									
14									

## 10. Provision to download consolidated quotation data excel export of all VQs to POC - INSTRAL Field team (FLM, SLM, ZSM), INSTRAL HO team (Sunil V & Team / IDAP Admin), & Distributor team and all divisions RSM, SLM, ZSM, NSM , SBU, GRP, Cluster with respect to their associated division/s . Should have option of latest (by default) & historical data to select:

- Agreed Solution Approach:** Add 2 static buttons on "View Quotation" screen of all users. One button is for "Latest/Consolidate" data and another is for "Historical/With Revision" data.
- Expected Output / Desired Result:** All users can able to download the quotation data excel with Latest or Consolidate manner and Historical or With Revision manner.

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The screenshot shows the 'VQ Request Listing' page in the iDAP system. The page displays a table of VQ requests with columns: InstitutionName, City, State, Contract Start Date, Contract End Date, VQYear, VQStatus, QuotationStatus, and Actions. The table lists 10 entries, all with 'Pending' status. The footer shows 'Showing 1 to 10 of 652 entries' and a copyright notice for Sun Pharma.

## 11. In view quotation page Zone , Region , hospital code , Mode of discount, stockist code , stockist name , revision no and plant code should be displayed:

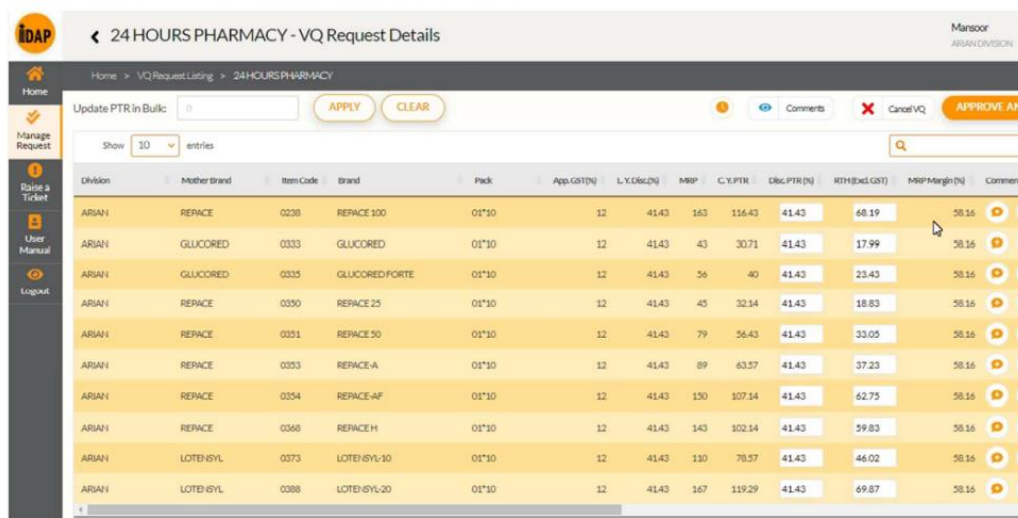
- Solution Approach:** Add Zone, Region, plant code, revision no (latest) to the header table. Create one more table to map stockist code and mode of discount. Show stockist detail as link of current header and in pop up, provide option to change mode of discount and stockist for the particular counter
- Sourcing:** check and fetch the required details from master tables using API
- Desired Result/Output:** Based on user ID, in VQ listing page, add ZONE, REGION, PLANT CODE, revision no and link to display stockist and mode of discount in pop up.
- Region will come from org\_structure table.

## 12. In VQ request detail page Display stockiest margin, billing price, based on discount rate, LY discount on MRP, LY DISCOUNT ON MRP and LY MRP. Provision to configure stockiest margin to display:

- Agreed Solution Approach:** Based on valid VQ ID, fetch required fields for current cycle. For Divisional, Regional Sales Manager (RSM) , Zonal Sales Manager( ZSM ), National Sales Manager( NSM ) ,Business Unit Head(SBU) , Semi Cluster head(GRP) , Cluster Head (CLH) Display divisional wise SKU only. For all other user, show all SKU.
- Expected Output / Desired Result:** based on VQ ID, **VQ request detail page**, Add stockist margin and billing price

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## Approver - VQ Request Detail Page

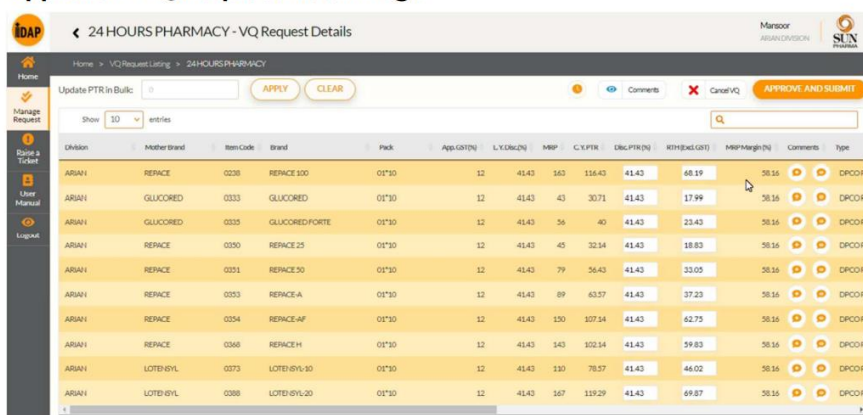


Division	Mother Brand	Item Code	Brand	Pack	App.GST(%)	L.Y.Disc(%)	MBP	C.Y.PTR	Disc.PTR(%)	RTH(Disc.GST)	MBP(Margh(%)	Comments
ARIAN	REPACE	0238	REPACE 100	01*10	12	41.43	163	116.43	41.43	68.19	58.16	
ARIAN	GLUCORED	0333	GLUCORED	01*10	12	41.43	43	30.71	41.43	17.99	58.16	
ARIAN	GLUCORED	0335	GLUCORED FORTE	01*10	12	41.43	56	40	41.43	23.43	58.16	
ARIAN	REPACE	0350	REPACE 25	01*10	12	41.43	45	32.14	41.43	18.83	58.16	
ARIAN	REPACE	0351	REPACE 50	01*10	12	41.43	79	56.43	41.43	33.05	58.16	
ARIAN	REPACE	0353	REPACE-A	01*10	12	41.43	89	63.57	41.43	37.23	58.16	
ARIAN	REPACE	0354	REPACE-AF	01*10	12	41.43	150	107.14	41.43	62.75	58.16	
ARIAN	REPACE	0368	REPACE-H	01*10	12	41.43	143	102.14	41.43	59.83	58.16	
ARIAN	LOTENISYL	0373	LOTENISYL 10	01*10	12	41.43	110	78.57	41.43	46.02	58.16	
ARIAN	LOTENISYL	0388	LOTENISYL 20	01*10	12	41.43	167	119.29	41.43	69.87	58.16	

### 13. Max discount Cap flag to be introduced and record having >= should be highlighted (division wise input option)

- Solution Approach:** Introduce maximum discount flag division wise and highlight the counter in light red if discount rate is more than maximum discount flag per division.
- Sourcing:** Max discount Cap flag will be provisioned as configurable and will keep records division wise max discount cap flag. Based on this flag, we need to check division wise discount rate.
- Expected Output / Desired Result:** Based on max discount flag, if any discount is more than it, highlight entire row with light red:

### d) Need to warn(pop up of warning) if any item code greater than capping flag



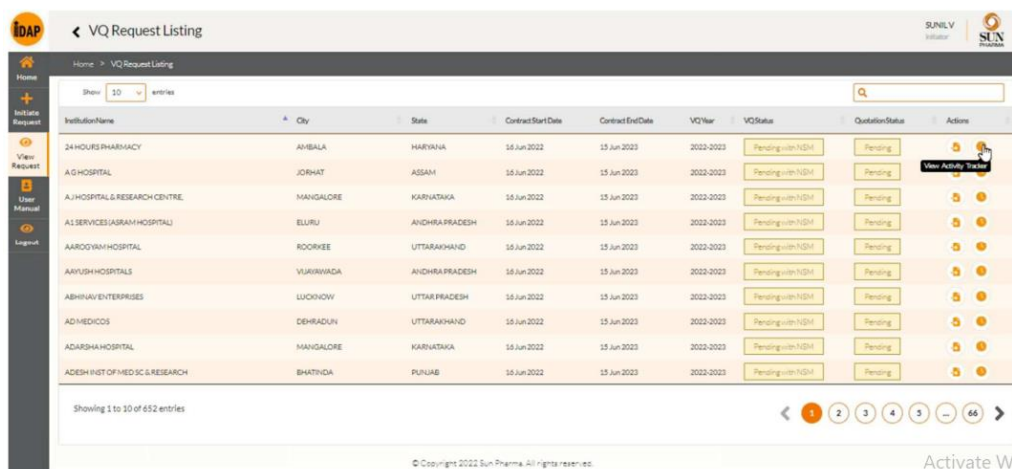
Division	Mother Brand	Item Code	Brand	Pack	App.GST(%)	L.Y.Disc(%)	MBP	C.Y.PTR	Disc.PTR(%)	RTH(Disc.GST)	MBP(Margh(%)	Comments	Type
ARIAN	REPACE	0238	REPACE 100	01*10	12	41.43	163	116.43	41.43	68.19	58.16		DPCCP
ARIAN	GLUCORED	0333	GLUCORED	01*10	12	41.43	43	30.71	41.43	17.99	58.16		DPCCP
ARIAN	GLUCORED	0335	GLUCORED FORTE	01*10	12	41.43	56	40	41.43	23.43	58.16		DPCCP
ARIAN	REPACE	0350	REPACE 25	01*10	12	41.43	45	32.14	41.43	18.83	58.16		DPCCP
ARIAN	REPACE	0351	REPACE 50	01*10	12	41.43	79	56.43	41.43	33.05	58.16		DPCCP
ARIAN	REPACE	0353	REPACE-A	01*10	12	41.43	89	63.57	41.43	37.23	58.16		DPCCP
ARIAN	REPACE	0354	REPACE-AF	01*10	12	41.43	150	107.14	41.43	62.75	58.16		DPCCP
ARIAN	REPACE	0368	REPACE-H	01*10	12	41.43	143	102.14	41.43	59.83	58.16		DPCCP
ARIAN	LOTENISYL	0373	LOTENISYL 10	01*10	12	41.43	110	78.57	41.43	46.02	58.16		DPCCP
ARIAN	LOTENISYL	0388	LOTENISYL 20	01*10	12	41.43	167	119.29	41.43	69.87	58.16		DPCCP

### 14. Provision to Filter hospital name / hospital code / city in reinstate screen

- Solution Approach:** Based on valid selection, fetch the respective data in listing page.
- Expected Results:** Filter the data based on hospital code, hospital name and city using below screen:



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Institution Name	City	State	Contract Start Date	Contract End Date	VQ Year	VQ Status	Quotation Status	Actions
24 HOURS PHARMACY	AMBALA	HARYANA	16 Jun 2022	15 Jun 2023	2022-2023	Pending with NDM	Pending	
A.G HOSPITAL	JORHAT	ASSAM	16 Jun 2022	15 Jun 2023	2022-2023	Pending with NDM	Pending	
A.J HOSPITAL & RESEARCH CENTRE	MANGALORE	KARNATAKA	16 Jun 2022	15 Jun 2023	2022-2023	Pending with NDM	Pending	
A.I SERVICES (ABIRAM HOSPITAL)	ELURU	ANDHRA PRADESH	16 Jun 2022	15 Jun 2023	2022-2023	Pending with NDM	Pending	
AAROGYAM HOSPITAL	ROORKEE	UTTARAKHAND	16 Jun 2022	15 Jun 2023	2022-2023	Pending with NDM	Pending	
ARVUSH HOSPITALS	VJAYAWADA	ANDHRA PRADESH	16 Jun 2022	15 Jun 2023	2022-2023	Pending with NDM	Pending	
ABHIRAM ENTERPRISES	LUCKNOW	UTTAR PRADESH	16 Jun 2022	15 Jun 2023	2022-2023	Pending with NDM	Pending	
ADIMEDICS	DEHRADUN	UTTARAKHAND	16 Jun 2022	15 Jun 2023	2022-2023	Pending with NDM	Pending	
ADARSH HOSPITAL	MANGALORE	KARNATAKA	16 Jun 2022	15 Jun 2023	2022-2023	Pending with NDM	Pending	
ADARSH INSTITUTE OF MEDICAL RESEARCH	BHATINDA	PUNJAB	16 Jun 2022	15 Jun 2023	2022-2023	Pending with NDM	Pending	

## 15. For Multiple pharmacy code of one hospital, One VQ should be sent:

- A screen need to develop to map hospital with pharmacy and grant access to INSTRA HO team to map. Change in the Agreed Solution Approach of VQ generation. If we have mapping, VQ should club all pharmacy into one and generate one VQ only otherwise follow current system.
- Solution Approach:** Need to create one mapping table. Save the record where multiple pharmacy is associated with single hospital. Now when you generate VQ. First check in this table that respective pharmacy has any mapping in this table. If exist, club all pharmacy and generate single VQ.
- Expected Output / Desired Result:** Clubbing multiple pharmacies of single hospital and generate single VQ. If no record exists, follow the existing Agreed Solution Approach

## 16. Email notification should go to concern division and initiator once INSTRA Field submit the feedback for hospitals:

- Agreed Solution Approach:** we need to give access to INSTRA Field team (FLM, SLM, TLM & NSM) to submit status of VQ as an option to share feedback. On submission email should trigger to all stockholders (Initiator, [RSM, ZSM, NSM, SBU] of respective division and INSTRA-HO.
- Expected Output / Desired Result:** Email should trigger to all stockholders (Initiator, [RSM, ZSM, NSM, SBU] of respective division, INSTRA HO & field. On feedback submission, email should trigger to INSTRA HO and respective division RSM, ZSM, NSM, SBU. Email should contain cover letter, SKU detail as an attachment.

## 17. Provision to validate PDMS discount, in case PDMS discount exist for particular item code, Stan code, division and financial year. IDAP should highlight such counter if rate is more than PDMS with PDMS counters:

- Agreed Solution Approach:** We need to develop solution which will consist region wise division wise maximum discount for particular SKU and validate against SKU.

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- b) **Sourcing:** API with maximum discount given region wise for the respective division & financial year.
- c) **Expected Output / Desired Result:** If IDAP discount is more than maximum discount of PDMS then show pop up that you cannot enter more discount than PDMS.
- d) **Only warning pop up will come.**

## 18. Drug license , validity from and to and upload provision to be introduced

- a) **Solution Approach:** A screen to be developed to input & upload pharmacy drug license no. with valid from and valid to date.
- b) **Expected Output / Desired Result:** Save licenses at drive and provide link to download the license in zip.

## C) Pharmacy drug license 20 , 21 and GST ( with length validation )

## 19. Fast forward approval on Mid-Year revision ( NSM -> Initiator)

- a) **Agreed Solution Approach:** On re-initiation screen, provision to be provided for fast forward approval. In fast forward approval workflow, actors are Initiator -> NSM -> Initiator. On NSM submission, all stockholder of respective division (RSM, ZSM, NSM, SBU, GRP, and CLH) should receive information email notification only.
- b) **Expected Output / Desired Result:** If selected fast approval process. Once NSM submit, it will only notify to other level of hierarchy.

## 20. Credit Note to Direct Master conversion and vice versa, to be provided for Sunil & Team:

- a) **Agreed Solution Approach:** Currently we will have only one option to all pharmacy. Either Direct Master or credit note for all pharmacy and saving mode of discount in pharmacy and hospital mapping. Now it is required to develop an option to change hospital wise mode of discount from DM to CN or vice versa and provide access to Only INSTRA HO team. On VQ listing page, link to provide option to pop up pharmacy detail with mode of discount.
- b) **Validation Check:** Must have hospital wise Mode of discount, be only one per VQ.

## 21. IDAP authentication through Email-OTP instead of metis credentials

- 1) **Agreed Solution Approach:** Currently we are using shine based authentication. Now we need to incorporate Email OTP based authentication process. We need to check where user ID is valid and send OTP to registered email ID. And verify user with sent OTP.
- 2) **Validation Check:** Must have valid user ID [valid metis user ID]



## Change Control Form

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Justification for Change:	<b>Benefits :</b>  1. Approval process and contract creation will get faster and easier than earlier. It Saves time and reduce delay which leads to increase in orders.  2. Distribution team have clear visibility to see all discount values for the hospital and stockiest.		
Initiator Approval	Sunil V		
	Name	Signature	Date
Functional Owner / Department head of initiator Approval	Thomas Edakalathoor		
	Name	Signature	Date
Category of Change	<input type="checkbox"/> System	<input type="checkbox"/> Documentation	
	<input type="checkbox"/> Minor <input checked="" type="checkbox"/> Major		
<b>Impact Assessment</b>			
Is this change feasible?			
Impact on Code/Configuration			
Testing Strategy			
Impact on any other existing functionality (Specify if any financial impact)			
Validation and Documentation Impact			



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Training Required	

Approval For Development			
Name – Technical Owner	Designation	Signature	Date
Name – Functional Owner	Designation	Signature	Date
Summary of activity/Performed			
Is this change Implemented?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<i>(Reason if no is selected)</i>	

Approval for Financial Impact (If any)		
Name & Designation	Signature	Date

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Approval For Implementation			
Name – Technical Owner	Designation	Signature	Date
Name – Functional Owner	Designation	Signature	Date
Approval For Completion/Closure			
Name – Technical Owner	Designation	Signature	Date
Name – Functional Owner	Designation	Signature	Date