MatchRx - HTC

Issue status

Gadgets can only be viewed in browsers

Gadgets can only be viewed in browsers

Current Sprint

Gadgets can only be viewed in browsers

Change Request

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Title	Approved (Y/N)	Implemented (Y/N)	Request created by	Requested Date	Requested by	Status
C006 - Salesforce - Rescheduling a pick up			Raghul Manoharan	09 Mar 2018	Mike Galloway	AWAITING APPROVAL
C015 - Web - MRX 3.0 & VM UI changes	Y		Raghul Manoharan	26 Jul 2018	Mike Galloway	APPROVED
C020 - Web & SF - VM Seller Profile and VM Buyer Buy			Raghul Manoharan	26 Jul 2018	Mike Galloway	BEING EVALUATED

Again						
C017 - Web & Salesforce- VM Seller Fee			Raghul Manoharan	07 Sep 2018	Mike Galloway	DRAFT
On Hold - Salesforce- IP Telephone			Raghul Manoharan	11 Jul 2018	Mike Galloway	CANCELED
C018 - Web & Salesforce- MatchMoney			Raghul Manoharan	07 Sep 2018	Mike Galloway	DRAFT
C019 - Web VM Wordpress			Raghul Manoharan	26 Jul 2018	Mike Galloway	BEING EVALUATED
C016 - Web - MRX 3.0 Bulk Search	Y		Raghul Manoharan	11 Jul 2018	Mike Galloway	APPROVED
C012 - MRX 3.0 Web, Mobile & SF - Member Status			Raghul Manoharan	18 Jul 2018	Mike Galloway	BEING EVALUATED
C011 - MRX 3.0 Web, Mobile & SF - Penalty and Fee			Raghul Manoharan	17 Jul 2018	Mike Galloway	BEING EVALUATED
C007 - Web - VM Shipping Shippo	Y		Raghul Manoharan	02 Apr 2018	Mike Galloway	APPROVED
C005 - Salesforce - Document Template Management	Y	Y	Raghul Manoharan	09 Mar 2018		IMPLEMENTED
C004 - Salesforce - MRX Sticker Case	Y	Y	Raghul Manoharan	23 Jan 2018	Mike Galloway	IMPLEMENTED
C002 - Mobile Barcode Scanning, Search & Sort	Y	Y	Raghul Manoharan	08 Feb 2018	Mike	IMPLEMENTED
C003 - Web Top Wishlist	Y	Y	Raghul Manoharan	19 Jan 2018	Mike Galloway	IMPLEMENTED
C001 - Mobile Transition page	Y	Y	Raghul Manoharan	08 Nov 2017	Mike	IMPLEMENTED
C009 - Web & SF - MRX 3.0 Monthly activity summary notification	Y		Raghul Manoharan	11 Jul 2018	Mike Galloway	APPROVED
C010 - Web & Mobile - MRX 3.0 Post an item - Pricing - Canceled			Raghul Manoharan	12 Jul 2018	Mike Galloway	CANCELED
C014 - Web, Mobile & SF - MRX 3.0 & VM User Agreement - Canceled			Raghul Manoharan	23 Jul 2018	Mike Galloway	CANCELED
C013 - Web & Mobile - Password Validation - Canceled			Raghul Manoharan	23 Jul 2018	Julio Marchi	CANCELED

C001 - Mobile Transition page

Requested Date	08 Nov 2017
Requested by	Mike
Request created by	Raghul Manoharan
Status	IMPLEMENTED
Approved (Y/N)	Y
Implemented (Y/N)	Y

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

When a MRX 2.0 user, who has never logged into the MRX 3.0 web application, is logging in to the MRX 3.0 Mobile app for the first time, the app needs to show a transition page. This transition page will be provided for the user to update the username, password and email address. The following mandatory fields will be shown on the transition page

Update user name: prepopulated and editable

Change password:

Confirm password:

Update email address: if available, prepopulated and editable

Submit button

When the user clicks Submit, the app has to update the database.

Evaluation:

Estimated Cost	$ 0
Estimated impact on schedule (Working Days)	0
Project Manager’s disposition - Approved (Y/N)	Y
Project Manager’s disposition - Deferred (Y/N)	Y. Deferred to milestone 2
Is the change request approved by the customer (Y/N)	Y
Approved by (Customer Representative)	Mike Galloway
Approved by (HTC Representative)	Bharath

If not approved by the customer, describe actions to be taken:

C002 - Mobile Barcode Scanning, Search & Sort

Requested Date	08 Feb 2018

Requested by	Mike
Request created by	Raghul Manoharan
Status	IMPLEMENTED
Approved (Y/N)	Y
Implemented (Y/N)	Y

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

Barcode Scanning:

The user of the mobile app should be able to search an NDC by scanning the barcode or QR code on the following pages

1. Buy Pages
2. My postings page

When a barcode/QR code is scanned, the NDC should be populated in the search field and searched immediately without the user requiring to click search. For buy pages and My postings page , the result should be list of postings which match the searched NDC.

Search & Sort

The user of the mobile app should be able to search using a NDC or a drug name and sort by all fields on the My postings page.

Evaluation:

Estimated effort (hours)	72
Estimated impact on schedule (Working Days)	0
Project Manager's disposition - Approved (Y/N)	Y
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	Y
Approved by (Customer Representative)	Mike Galloway
Approved by (HTC Representative)	Bharath

If not approved by the customer, describe actions to be taken:

C003 - Web Top Wishlist

Requested Date	19 Jan 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	IMPLEMENTED

Approved (Y/N)	Y
Implemented (Y/N)	Y

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

The "Wishlist" menu will have two tabs, My Wishlist and Top wishlist items. This change request is related to Top wishlist only.

Top wishlist

This page will list the top 100 NDCs that have been added to the wishlist by the users of MatchRX in a grid. The grid will have the following fields.

The top 100 NDCs are the NDCs that are most wishlist-ed by the users of MatchRX.

Field Name	Rules
Rank Number	Rank of the NDC in the top 100 list
NDC	Hyperlinked. When user clicks on NDC #, the system should search the buy marketplace with the NDC #
Drug Name	Read only field
Add to Wishlist	A button for the user to add the NDC to his/her wishlist. The button should be disabled if the NDC is already in the user's "My wishlist"
Post this item	A button for the user to post the NDC. When the button is clicked, the system should display the "Post an item" tab under the "Sell" menu with the NDC field pre-filled with the NDC #.

The user should be able to

1. Sort using all the above fields except add to wishlist and Post this item.

The top 100 NDCs should be displayed on a single page.

Evaluation:

Estimated effort (hours)	40
Estimated impact on schedule (Working Days)	0
Project Manager's disposition - Approved (Y/N)	Y
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	Y
Approved by (Customer Representative)	Mike Galloway
Approved by (HTC Representative)	Bharath

If not approved by the customer, describe actions to be taken:

C004 - Salesforce - MRX Sticker Case

Requested Date	23 Jan 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	IMPLEMENTED
Approved (Y/N)	Y
Implemented (Y/N)	Y

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

MRX sticker:

When posting an NDC on the MRX 3.0 FO website, the user will be able to order for MRX Stickers. (Related User Story - US 8 - MRX 3.0 & Mobile - Post an item - Basic Flow - Step 12)

The user has two options

- MatchRX Stickers
- Frozen / Refrigerated Shipping Stickers

If the member selects one or both the options, a case has to be created in Salesforce.

1. The back office user has to be notified using Salesforce that the member has ordered stickers.
2. Salesforce should display and enable the BO user to print a address label with member's DBA and shipping full address.
3. The BO user should be able to manage the case life-cycle such as marking it complete or assigning a different BO user.

Evaluation:

Estimated hours	32
Estimated impact on schedule (Working Days)	4
Project Manager's disposition - Approved (Y/N)	Y
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	Y
Approved by (Customer Representative)	Mike
Approved by (HTC Representative)	Bharath

If not approved by the customer, describe actions to be taken:

C005 - Salesforce - Document Template Management

Requested Date	09 Mar 2018

Requested by	
Request created by	Raghul Manoharan
Status	IMPLEMENTED
Approved (Y/N)	Y
Implemented (Y/N)	Y

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

Templates:

- The requirement is to create and store 5 different templates in Salesforce.
- These templates are primarily used to create documents as part of a task in salesforce.
- These templates will contain variable such as First Name, Last Name, Pharmacy DBA, Address which should be correctly populated from the DB
- A BO user should be able to update, edit and delete these templates using a HTML editor.
- Two of the example templates are Welcome Letter MRX 01012018.doc and address label which will contain the First Name, Last Name, Pharmacy DBS, Street address 1, Street address 2, City, State, Zip and phone number.

Evaluation:

Estimated hour	48
Estimated impact on schedule (Working Days)	6
Project Manager's disposition - Approved (Y/N)	Y
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	Y
Approved by (Customer Representative)	Mike
Approved by (HTC Representative)	Bharath

If not approved by the customer, describe actions to be taken:

C006 - Salesforce - Rescheduling a pick up

Requested Date	09 Mar 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	AWAITING APPROVAL
Approved (Y/N)	

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

Reschedule pick up:

- The Salesforce system should create a task, assign and notify assigned BO users if the FedEx status hasn't changed to picked up within the schedule pick up time + defined number of hours
- Example: The scheduled pick up time is 1 PM on March 9, 2019 and the defined number of hours is 4 hours. If the FedEx tracking number doesn't update to picked up before 5 PM, then salesforce has to create a task, assign and notify the seller's CSR.
- The BO user should have the ability to schedule a new pick up for the order. The task should generate the following information
  - Seller Pharmacy DBA (hyperlinked to account page)
  - Seller Address
  - Order Number (hyperlinked to order page)
  - Current status of the order
  - Tracking number (hyperlinked to FedEx website tracking page)
  - Current status of the tracking number
  - Pick up number (hyperlinked to FedEx website pickup tracking page)
  - Original Pick up schedule date and time
  - Ability to select a new date and time for pick up (Refer US 30 - MRX 3.0 Order Life-cycle - Sales in Progress - Action Required - Ship Date & Package will be ready for pickup at)
- Salesforce should send the new pick up date and time information to FedEx using the FedEx API and schedule a new pick up.
- If the process errors out, salesforce should display an error message asking the user to retry later.

Evaluation:

Estimated hours	40
Estimated impact on schedule (Working Days)	
Project Manager's disposition - Approved (Y/N)	
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	
Approved by (Customer Representative)	
Approved by (HTC Representative)	

If not approved by the customer, describe actions to be taken:

C007 - Web - VM Shipping Shippo

Requested Date	02 Apr 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	APPROVED
Approved (Y/N)	Y

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

The Vendor Marketplace web application should provide the following features

Linking shipping accounts

1. The application should provide a page for VM sellers to link multiple shipping accounts (e.g. FedEx, Ups, USPS etc.) by entering the shipping account details (account number, account pin etc. depending on the shipping carrier).
2. The seller will be able to add only one shipping account per shipping carrier.
3. Unless supported by Shippo, the website will not validate if the account details provided by the seller is correct.
4. A seller will not have the ability to create new shipping accounts on our website.
5. If the seller tries to delete a linked shipping account X, the system has to check if there are any postings which have X has the only shipping method assigned. If yes, the system has to display the error message " '{number of such postings} postings have '{X} has the only ship method. You will have to reassign the ship method of these postings to delete the linked shipping account." If there is more than one ship method of the posting, the system has to delete the ship method X for those postings and the buyer will use the other shipping methods during checkout.
6. A BO user should have the same functionality on Salesforce.

Selecting account when posting an item

1. When posting an item, the VM seller should be able to select up to four shipping methods.
2. The shipping methods could be from the same shipping account or different shipping account.
3. In addition to the four shipping methods, the seller will be able to offer a manual (non-Shippo API) shipping option by providing the shipping rate per box and the max qty per box.
4. The seller will not have the ability to add new shipping accounts in this page and has to select the shipping accounts that have been already linked.
5. The seller should have free shipping checkbox for each of the four shipping methods. If the free checkbox is checked, the checkout page for the buyer will display the particular shipping method as free.
6. A seller cannot select the same shipping option (e.g. USPS Priority two day) for more than one shipping method.
7. The seller will also select the shipping address from which the item is going to be shipped. This address will be used as "Ship from" in the API request. The seller will be able to add and edit shipping address.
8. A BO user should have the same functionality on Salesforce when editing a posting.
9. On "My Postings" page, the VM seller should have the option to filter the postings based on ship carrier assigned to the posting. The filter will have a drop down and the options will be same as linked shipping accounts.

Checkout Page

When a buyer is on the checkout page with one or more products in the cart, the buyer will have the option to select the shipping method for each product separately. The shipping methods will be displayed as a drop down and the options in the drop-down will be populated based on the methods selected by the seller while posting the item.

If Shippo returns an error for the shipping price of a particular linked account (e.g. linked FedEx account is closed), the system should display an error "Please call customer service at 877-971-0909 ". If the item has more than one shipping method, the message should be displayed only to linked accounts that receive an error from Shippo. The other accounts should display the shipping price.

Order Life-cycle

The seller should be able to upload multiple tracking numbers for an order. The seller will have the option to mention that the entire order is being shipped with one tracking number or more than one tracking number. The seller will choose the shipping carrier from a drop down (https://goshippo.com/carriers/) and type the tracking number. The system has to validate if the tracking number schema is correct (Schema to be provided by goShippo). The seller will be able to set the default option in the drop-down. A BO user should have the same functionality as a seller on Salesforce when editing an order.

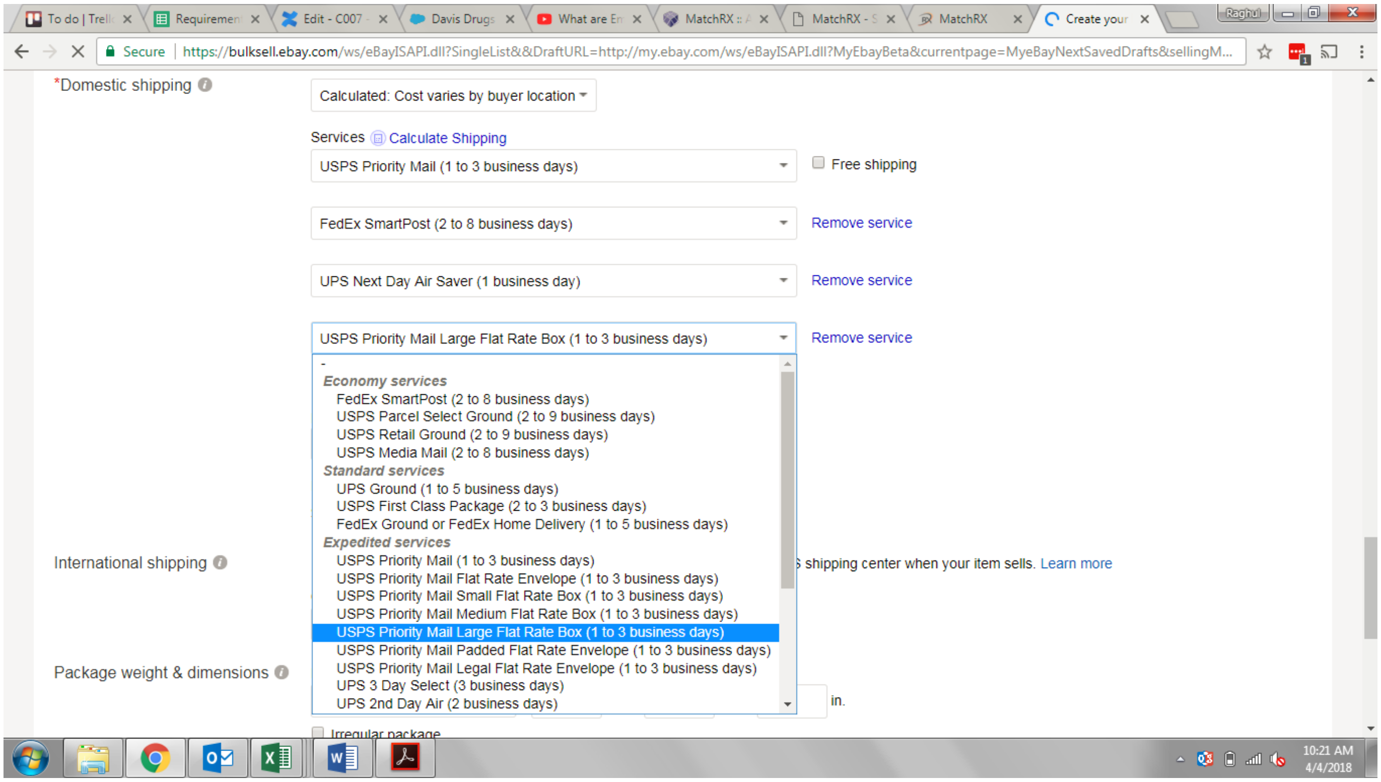
When shipping with more than one tracking number, the seller will select the item and quantity shipped.

The system has to regularly check the status of the tracking number and display the status on both the webpage and Salesforce. The change in tracking number status will act as a trigger to change order status and to notify the Back office and Front office users.

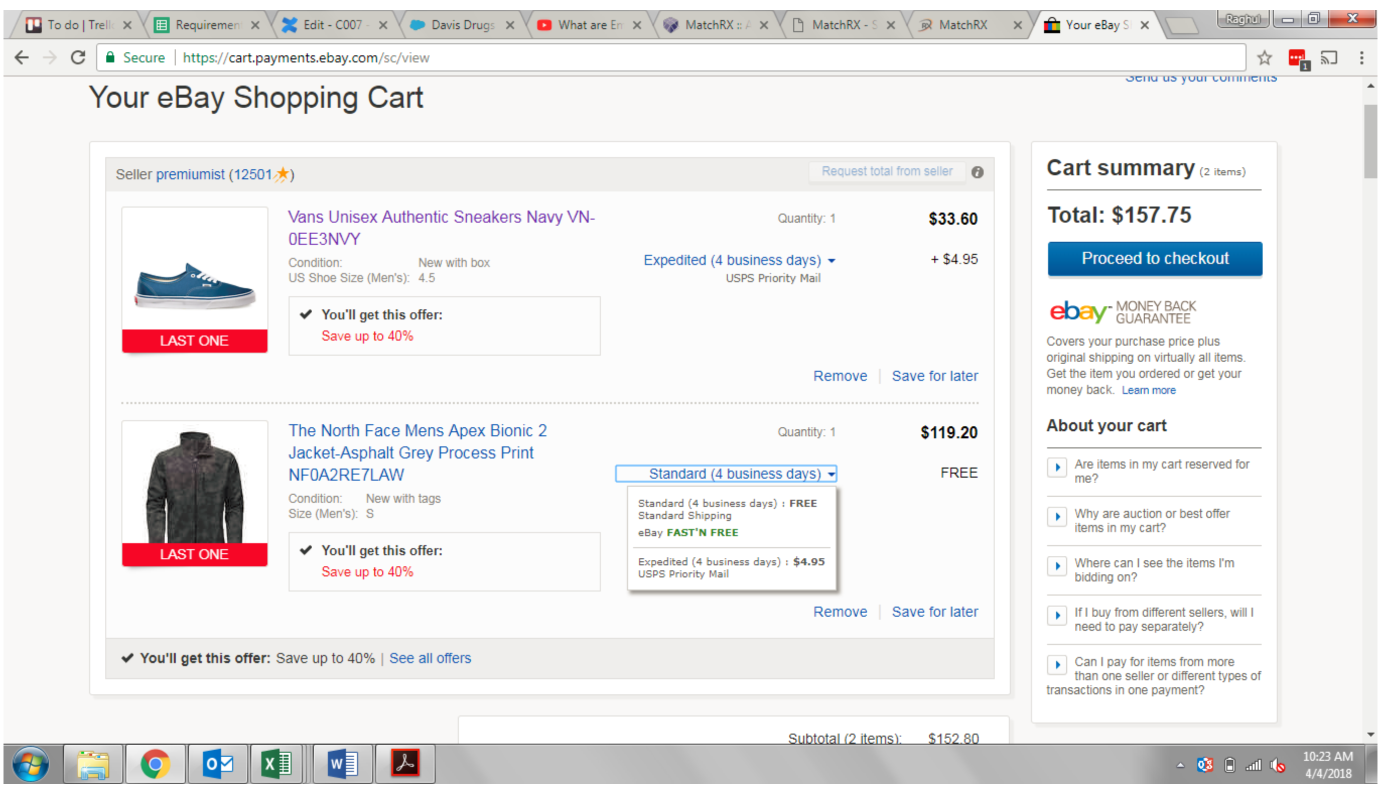
Screen mock-ups

Please refer to eBay to understand the user experience regarding shipping while posting an item as a seller and checking out as a buyer

Posting an item on eBay



Checkout Page on eBay



Evaluation:

Estimated hour	480
Estimated impact on schedule (Working Days)	To be developed after completion of Project 1
Project Manager's disposition - Approved (Y/N)	Y
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	Y
Approved by (Customer Representative)	Mike Galloway
Approved by (HTC Representative)	Bharath

If not approved by the customer, describe actions to be taken:

C009 - Web & SF - MRX 3.0 Monthly activity summary notification

Requested Date	11 Jul 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	APPROVED
Approved (Y/N)	Y

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

The MRX 3.0 web application should provide the following feature

MRX 3.0 Contacts Details Page

1. On the "MRX 3.0 - My Accounts - Contacts manager - Contacts Details" page, the system should display the email notification checkbox " Monthly activity summary".
2. This notification preference is an addition to the existing notification preference mentioned in US 6 - Pharmacy/VM Wholesaler Menu - *BR _Notifications*
3. This notification preference is applicable only for email and not applicable for SMS or Mobile Push notification.
4. This notification preference is applicable only for MRX 3.0 application and not for VM application.
5. Only primary users will be able to enable or disable this notification preference.
6. A primary user will be able to enable or disable this notification preference for any primary or secondary user.
7. A secondary user will NOT be able to enable or disable this notification preference for any primary or secondary user including self. The secondary user will be able to view the status (enabled/disabled) of the notification preference.
8. Finance and No access user will not have this notification preference.
9. By default, this notification preference will be checked for all primary users and unchecked for all secondary users.
10. This notification preference will have an info icon with the following messages on mouse over "X".
11. This notification preference should be displayed for the BO user on SF screen and the BO user should be able to change (enable/disable) the preference.

Evaluation:

Estimated hour	88
Estimated impact on schedule (Working Days)	To be developed after completion of Project 1
Project Manager's disposition - Approved (Y/N)	Y
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	Y
Approved by (Customer Representative)	Mike Galloway
Approved by (HTC Representative)	Bharath

If not approved by the customer, describe actions to be taken:

C010 - Web & Mobile - MRX 3.0 Post an item - Pricing - Canceled

Requested Date	12 Jul 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	CANCELED
Approved (Y/N)	

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

The MRX 3.0 web and mobile application should make the following changes. This feature will not be available on VM platform or Salesforce.

MRX 3.0 Web & Mobile Post an item page

The following changes need to be made in US 8 - MRX 3.0 & Mobile - Post an item

1. The field name "WAC Discount" for the slider should be renamed to "Slide to adjust price". Before the user enters an NDC, the Min and Max value for the slider (different from the Min and Max value used for declining price) will be empty.
2. When the user enters a valid NDC, the slider thumb will be inactive and the pack price will be $0.00 (empty for mobile) and inactive (not applicable for mobile). The slider thumb will not display any value ($2 for mobile). The page should also display if the NDC is generic or brand.
3. After step 3 in the US 8 - Flowchart - Basic flow section, the system has to check if the NDC is brand or generic.
    a. If Brand, the system has to display the slider with Min value = $2 and Max value = `[90% x (WAC price per unit) x package quantity]
    b. If Generic, the system should
        i. Not display the WAC discount row in the marketplace comparison table
        ii. Display the message "Price per unit of the older open postings may exceed the average sales price over the past 90 days."
        iii. Check the number of times the NDC has been sold* in the last 90$^+$ days (including current date)
            1. If X$^+$ or more times, the slider will display the Min value =$2 and Max value = Lesser of `[120%$^+$ x (Average sales price per unit of the NDC in the last 90 days) x package quantity] or `[90% x (WAC price per unit) x package quantity]
            2. If its sold at least once but less than X$^+$ times, the slider will display Min value = $2 and Max value = Lesser of `[120%$^+$ x (Highest sales price per of the NDC in the last 90 days) x package quantity] or `[90% x (WAC price per unit) x package quantity]
            3. If it is not sold, the system has to display the slider with Min value = $2 and Max value = `[90% x (WAC price per unit) x package quantity]

Where X is a value set by an admin in the configuration file (outside of Salesforce). In all the above scenarios, if WAC price is not available, 75% of AAWP price is used.

`* - If an order A has the same NDC on 2 lines with different posting IDs, the NDC will be counted as sold 2 times. If Order B has an NDC with quantity 5, the NDC will be counted as sold 1 time. Canceled orders and Order in the process are also considered for this calculation.

4. When the user changes Pack quantity from "Full" to "Partial", the slider will be disabled. Once the user enters a valid value in the "Partial" field and exits the field, the min and max value should be displayed based on the quantity. In case of mobile, pack price should be empty on step 2.

5. When the user changes Pack quantity from "Partial" to "Full", pack price should be set to 0. Min and Max price should be displayed based on the rule mentioned in Step 2 above. In case of mobile, pack price should be empty on step 2.

MRX 3.0 Web & Mobile - Full edit of a posting

1. As soon as the user opens full edit mode for a posting, the system should display the Min and Max value based on the latest calculations. Marketplace comparison table will also be updated based on the latest calculations.
2. While editing any field, if the current price (Fixed or Declining) is outside the range of new Min and Max values, the system should display an error message and the user should be forced to change the price to be within the range to save the edit. The price field outer frame should become red. The user should be able to enter a new value or use the slider.

MRX 3.0 Web My posting - Inline editing

1. As soon as the user clicks on price field, the system should display the Min and Max value based on the latest calculations. Marketplace comparison table will also be updated based on the latest calculations.

$^{+}$ These values should be stored in the configuration file for the IT admin to easily modify.

Evaluation:

Estimated hour	
Estimated impact on schedule (Working Days)	To be developed after completion of Project 1
Project Manager’s disposition - Approved (Y/N)	
Project Manager’s disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	
Approved by (Customer Representative)	
Approved by (HTC Representative)	

If not approved by the customer, describe actions to be taken:

C011 - MRX 3.0 Web, Mobile & SF - Penalty and Fee

Requested Date	17 Jul 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	BEING EVALUATED
Approved (Y/N)	

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

Cancelation Seller Fee

MRX 3.0 Web & Mobile:

When an order is canceled by the seller or BO on behalf of the seller when the status is "Pending seller confirmation" or by the buyer when the status is "Seller Revised" or the system should generate a financial transaction worth 10% of the line item that is marked revised or out of stock by the seller, not to exceed $100 per order. The first^{+} such order cancellation within last +/- X^{+} days (including current date) should not be charged but a message has to be displayed that future orders will be charged. At launch, the system should make sure the seller gets one freebie even if the seller has a cancellation in the last X days.

The fee and a message have to be displayed on the following pages

1.Order details page of Seller with order status:

- Pending seller confirmation
- Seller revised
- Canceled (web only)
- Order Invoice (web only)

2. My Orders - Sell History - Canceled table (web only)

3. Dashboard - Statements page of Seller (web only)

- A New column "Cancellation fee" should be added to the PDF, XLS, and webpage.

4. Cancelation email sent to seller

Salesforce:

1. Order details page will show this new fee as "Cancellation Fee"
2. Reports will have a new field called "Cancellation Fee"
   a. Admin Dashboard Report
   b. Sales Rep Dashboard Report
   c. Revenue Report
3. Financial transactions will have a new transaction category - "Cancellation Fee"

Inactive Fee

MRX 3.0 Web:

If a member does not have any buy or sell activity in the 12 months^{+} preceding the member's anniversary date, a $90^{+} ACH Debit financial transaction will be automatically generated on the anniversary date. Orders with the status other than "Canceled" are considered as activity. Canceled orders and Posting an item is not considered as an activity.

The member should also be able to reference an invoice in their history that details the charge.

The fee has to be displayed on the Dashboard - Statements page of Seller

- A line item should be added to the PDF, XLS, and webpage. Instead of the NDC Name, the message "Inactive fee" will be displayed with the $ value of the fee

Salesforce:

1. On SF Account details page of the member, the number of days since last buy or sell activity should be displayed and it should reset on every anniversary date of the member
2. Reports will have a new field called "Inactive Fee"
   a. Admin Dashboard Report
   b. Sales Rep Dashboard Report
   c. Revenue Report
3. Financial transactions will have a new transaction category - "Inactive Fee"

Closing Fee

MRX 3.0 Web:

No changes required.

Salesforce:

1. A $100 closing fee will be manually generated by the BO user in SF. The BO user will use the add new financial transaction option to generate the transaction.
2. Reports will have a new field called "Closing Fee"
   a. Admin Dashboard Report
   b. Sales Rep Dashboard Report
   c. Revenue Report
3. Financial transactions will have a new transaction category - "Closing Fee"

+ - *Variable in the configuration file for IT admin to easily modify.*

Evaluation:

Estimated hour	
Estimated impact on schedule (Working Days)	To be developed after completion of Project 1
Project Manager's disposition - Approved (Y/N)	
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	
Approved by (Customer Representative)	
Approved by (HTC Representative)	

If not approved by the customer, describe actions to be taken:

C012 - MRX 3.0 Web, Mobile & SF - Member Status

Requested Date	18 Jul 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	BEING EVALUATED
Approved (Y/N)	

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

Goal: Establish a member classification program that ranks members by activity volume and offers rewards similar to a frequent flyer program. This classification replaces the existing Member Group classification.

			Platinum	Gold	Silver	Bronze

Reward Type	Transaction Criteria (completed orders)	Context	Avg 20$^+$ or more transactions (buy/sell) per month	Avg 9 - 19.999$^+$ transactions (buy/sell) per month	Avg 3 - 8.999$^+$ transactions (buy/sell) per month	Avg <3$^+$ transactions (buy/sell) per month
Buyer	Buy Escrow	Adding to cart and Order checkout. Combined limit for VM and MRX	$40K	$30K	$25K	$20K
Buyer	Free Ground Shipping$^+$ on purchases 500^+$	Order Checkout	First Friday$^+$ of the month	First Friday$^+$ of the month	First Friday$^+$ of the month	N/A
Seller	40$^+$ or more open postings (unique posting IDs) at time of sale	Order Checkout / Seller confirmation	7.5%$^+$ Seller Fee	7.5%$^+$ Seller Fee	N/A	N/A
Seller	50$^+$ or more open postings (unique posting IDs) at time of sale	Order Checkout / Seller confirmation	7.5%$^+$ Seller Fee	7.5%$^+$ Seller Fee	7.5%$^+$ Seller Fee	7.5%$^+$ Seller Fee
Buyer	MRX 3.0 Buying order min (money)	Order Checkout	$15	$15	$15	$15
Seller	Selling fee if # of items posted (unique posting IDs) in the lifetime is between 0 - 24	Order Checkout / Seller confirmation	12%$^+$ Seller Fee	12%$^+$ Seller Fee	12%$^+$ Seller Fee	12%$^+$ Seller Fee
Seller	Selling fee if # of items posted (unique posting IDs) in the lifetime is more than or equal to 25	Order Checkout / Seller confirmation	9.5%$^+$ Seller Fee	9.5%$^+$ Seller Fee	9.5%$^+$ Seller Fee	9.5%$^+$ Seller Fee
Buyer	Early Wishlist (2$^+$ hrs earlier)	Wishlist Cron Job	Yes$^+$	N/A	N/A	N/A
Seller	Wave $2.50 Seller Pickup Fee	Order Checkout / Seller confirmation	Yes$^+$	N/A	N/A	N/A

Rules:

The member's status is determined on the first day of every month based on the previous 3 calendar month rolling average number of Transactions (# of sales + # of buys with order status = completed and order completion date within the activity period). The status will remain the same for the entire month even if there are changes to the transactions used for the calculation. The member's status will reset on the first of every month.

Example for July 1:

	# of transactions				
	Member A	**Member B**	**Member C**	**Member D approved on June 10**	**Member F approved on May 25**
April	29	30	6	0	0
May	21	7	11	0	2
June	27	18	1	30	58
Average per month	25.66	18.33	6	10	20
July Status	Platinum	Gold	Silver	Gold	Platinum

MRX 3.0 Mobile:

- Seller confirmation Order details page for the seller should reflect the member status that was in place when the order was created.

MRX 3.0 Web:

- Order details page should reflect the member status that was in place when the order was created. Must be displayed at the transaction

level.
- A new tab "Member status" under the "Dashboard" menu should display the current member status and few more statistics such as
  - What is the member's current month status
  - What will be member status next month based on current number of transactions
  - How many more transactions required to reach next status level
  - Current seller fee in %

Salesforce:

- Orders tab and order details page should reflect the member status that was in place when the order was created. Must be displayed at the transaction level.
- Escrow limit can be overwritten by the BO user and can be set as a permanent change or temporary change till the 1st of the upcoming month. Toggle in member record.
- This member status classification will replace Pharmacy Group - *BR_Financial Group (US 18)*

DB & Code:

- Status history for each month should be stored in the DB. (matrix of the member name, month, status)
- Transaction criteria and the entire table must be stored in the configuration file. We need to keep track of status and criteria historically. No retroactive calculations.
- Three full calendar month look back at launch
- Current member status must be visible on the SF account details page for the back office user. Must also be visible to the member on the Dashboard - Member status

$^{+}$ - Variable in the configuration file for IT admin to easily modify.

Evaluation:

Estimated hour	
Estimated impact on schedule (Working Days)	To be developed after completion of Project 1
Project Manager’s disposition - Approved (Y/N)	
Project Manager’s disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	
Approved by (Customer Representative)	
Approved by (HTC Representative)	

If not approved by the customer, describe actions to be taken:

C013 - Web & Mobile - Password Validation - Canceled

Requested Date	23 Jul 2018
Requested by	Julio Marchi
Request created by	Raghul Manoharan
Status	CANCELED
Approved (Y/N)	

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

Current validations for the password:

Usernames will be a normal string, lowercase, no spaces. Numbers should be allowed as far as it is not the first character of the Username. Not symbols should be allowed other than underscores "_", dots "." or dashes "-".

The passwords for the MatchRX 3.0 should follow strict rules. At least 6 or 8 characters (max 20), with at least one number, one caps letter, and one symbol. No spaces or "$" sign allowed.

Password will be stored in an encrypted form (using MCRYPT technology + SALT). Password will validate by comparing the encrypted form during password input. No unencrypted passwords should ever reach MatchRX DB.

Old (legacy) passwords may be kept as they are, but they won't be imported into the new login system. Legacy pharmacy credentials will be kept only for the one-time validation of the account owner while login in for the first time in the MatchRX 3.0. This first-time login will force them to create the primary account(login and password) while reviewing to re-recreate all the sub-accounts priorly connected with that pharmacy. Sub-accounts may be pre-populated as we have emails and (some) configuration (email, SMS). But, each existing "user" will be converted into a real "accounts", and require username + password creation.

One idea is to allow passwords for the sub-accounts to be created by the new pre-authorized user during the first login attempt. A temporary password can be created for that purpose when the owner revalidates the accounts.

New validations:

The password requirements for pharmacy login and wholesale login should make the following changes. The change is applicable to both web and mobile application. Salesforce will not be affected by this change.

1. The password **must START** with a "*common character*", a number or a letter (never a symbol). The "$" sign and other known *special command characters* should be allowed in the password except for first character.
2. Passwords must be in between 8 and 20 characters
3. It MUST have, at least, one of each element: a **UPPERCASED** character, a "**lower case**" character, one **number** and one **symbol**.
4. Blank **spaces** are should not be allowed in passwords.
5. Change the help text message to "At least one number, one lowercase, one uppercase, and one special character. Spaces are not allowed. Upon password reset, the user will be required to login with new credentials.". I believe this message is required on My Accounts - Contacts manager - Edit contact screen and reset password page through the forgot password email.

Most of those rules apply only when a password is created and should not affect the performance of its utilization. Together with MCRYPT "cost" value, the combination should be virtually unhackable and hard to guess (brute force).

Despite the security, it is important to keep the "password concept" simple and obvious for members. It is really obnoxious when I get into the system that "forces me" to something too specific. It is not only annoying but also less safe (as the rules of the password are mostly exposed).

If we simply follow the most respectable and high-security standards and, most importantly, do not differ from other systems "inventing" something *new*, our users and our systems will be well secure.

Pages that may require changes based on the new validations:

1. Web - contact manager details page
2. Web - profile creation (sign up) page
3. Web - MRX 2.0 to 3.0 transition page
4. Mobile - MRX 2.0 to 3.0 transition page

Evaluation:

Estimated hour	
Estimated impact on schedule (Working Days)	To be developed after completion of Project 1
Project Manager's disposition - Approved (Y/N)	
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	
Approved by (Customer Representative)	
Approved by (HTC Representative)	

If not approved by the customer, describe actions to be taken:

C014 - Web, Mobile & SF - MRX 3.0 & VM User Agreement - Canceled

Requested Date	23 Jul 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	CANCELED
Approved (Y/N)	

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

The web, mobile, and Salesforce applications should make the following changes to capture the acceptance of the updated user agreement

Web & Mobile Login

The first time a user logs in, the system has to display a checkbox with a link to the user agreement and the buttons "Accept" and "Logout". If the user accepts, the system has to capture the following information

1. User unique ID in the DB
2. Timestamp
3. IP address
4. Device ID (IMEI and mac address for mobile Android only)
5. User agreement version number

After the first login, every time a user logs in, the system has to check the current user agreement version number and the user agreement version number previously accepted by the user. If the version numbers are different, the system has to display a checkbox with a link to the latest user agreement and the buttons "Accept" and "Logout". If the user accepts, the system has to capture the following information in the DB as a new record and should not overwrite the previous record.

1. User unique ID in the DB
2. Timestamp
3. IP address
4. Device ID (IMEI and mac address for mobile Android only)
5. User agreement version number

If user bypass the user agreement, the user should be should be shown the user agreement on next click.

Mobile

A user could remain logged in on a Mobile App for a long time. After a user agreement is updated (change in version number) and when the user navigates to a different page on the mobile app, the system has to display a checkbox with a link to the latest user agreement and the buttons "Accept" and "Logout". If the user accepts, the system has to capture the following information

1. User unique ID in the DB
2. Timestamp
3. IP address
4. User agreement version number

Salesforce

A BO user has the ability to log into front office website as a front office user. If the current user agreement version number doesn't match the user agreement version number previously accepted by the front office user, the system should NOT display any message. The BO user should be allowed to use the website. When the front office user logs in the next time, the system has to display the message to capture the acceptance of new user acceptance.

The acceptance of user agreement during registration should also be stored in the mySQL DB along with acceptance of future versions.

Evaluation:

Estimated hour	
Estimated impact on schedule (Working Days)	To be developed after completion of Project 1
Project Manager's disposition - Approved (Y/N)	
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	
Approved by (Customer Representative)	
Approved by (HTC Representative)	

If not approved by the customer, describe actions to be taken:

C015 - Web - MRX 3.0 & VM UI changes

Requested Date	26 Jul 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	APPROVED
Approved (Y/N)	Y

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

The web application should make the following changes

MatchRX 3.0 UI:

The following aspects have to be changed for MatchRX 3.0 post login pages:

1. My savings information on the header bar
2. My cart icon on the header bar
3. Radio buttons used of navigation should be changed to tabs on all pages
4. Quick search bar on all pages
5. Filter options on Buy page
6. Sort options on Buy page

VM UI:

The following aspects have to be changed for VM post login pages:

1. My cart icon on the header bar
2. Radio buttons used of navigation should be changed to tabs on all pages
3. Quick search bar on all pages
4. Filter options on Buy page
5. Sort options on Buy page
6. Product card layout on Buy page
7. ~~A new page for seller with seller information, seller's product with filter and sort. (~~This will be documented as a separate CR document)

Evaluation:

Estimated hour	96
Estimated impact on schedule (Working Days)	To be developed after completion of Project 1
Project Manager's disposition - Approved (Y/N)	
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	
Approved by (Customer Representative)	
Approved by (HTC Representative)	

If not approved by the customer, describe actions to be taken:

C016 - Web - MRX 3.0 Bulk Search

Requested Date	11 Jul 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	APPROVED
Approved (Y/N)	Y

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

The MRX 3.0 web application should provide the following feature

MRX 3.0 Buy Page

1. On the "MRX 3.0 Buy - All Postings" tab on Buy page, a registered user should be able to perform a search with multiple NDCs at once. On other pages, the user will only be able to perform a quick search with one NDC or search term.

2. The user will not be able to perform a bulk search on other tabs such as "Buy again" and "My wishlist" tab of Buy page.
3. The user will be able to download the template provided on the Buy page.
4. The user should input the NDC as 10 or 11 digits with or without hyphens (hyphens not counted as digits) in the CSV file and upload on the Buy page.
5. If the system finds one or more invalid NDC format in the uploaded CSV file, the system should display an error "Invalid NDC format. NDC should be 10 or 11 digits with or without hyphens (hyphens not counted as digits)" and stop the process.
6. If all the NDCs are in correct format, the system should search all the NDCs found in the CSV file and display the items matching the NDCs on the Buy page. The system should consider an NDC valid even if it not found in the database.
7. Minimum of 1 and Maximum of 100 NDCs can be searched with one file upload.
8. The result should be displayed as follows:
    a. The items should be sorted by NDC (A-Z)
    b. When more than one item is found for an NDC, the results should be sorted by price per unit (lowest to highest)
9. If the user performs any filter or sort to the search results, the system should perform the selected filter/sort. The system should not clear the search results.
10. When an item is added to the cart after performing the bulk search, the system should not clear the search results. The items displayed for each tab (All, Seller A, Seller B etc.) should be based on the bulk search results.
11. The user should be able to upload the file even when multiple seller experience is active (when at least one item is currently in the cart). After the bulk search, the items displayed for each tab (All, Seller A, Seller B etc.) should be based on the bulk search results.
12. The webpage should display that the bulk search is currently active and provide the ability to clear the bulk search results. The user has to re-upload the CSV file to perform the bulk search again
13. When the user exits the "buy page - all postings" tab with bulk search results, the system has to display the message "Bulk search results will be cleared. Are you sure you want to leave this page?" Options: Yes and Cancel. This message has to be displayed even when the user navigates to "Buy - My wishlist" or "Buy - Buy again" tab. If the user selects "Yes", the bulk search results should be cleared.
14. This feature will not be available on Mobile App or VM platform or Salesforce.

Evaluation:

Estimated hour	328
Estimated impact on schedule (Working Days)	To be developed after completion of Project 1
Project Manager's disposition - Approved (Y/N)	Y
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	Y
Approved by (Customer Representative)	Mike
Approved by (HTC Representative)	Bharath

If not approved by the customer, describe actions to be taken:

C017 - Web & Salesforce- VM Seller Fee

Requested Date	07 Sep 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	DRAFT
Approved (Y/N)	

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

MatchSquare will provide two methods to charge a seller. A single method will be selected in the Seller Profile and only modified by the back office user with appropriate user rights. Credit card processing fees will be standard in both Method #1 and #2 when a credit card is used as the payment method. The credit card fees will be managed in the configuration file and will be a % of total order value (including shipping) plus a transaction fee. For example - 3% plus $0.25.

Method #2 - Tiered % based on the average monthly product completed sales (transaction date and value) for the previous “X” calendar months (Min 1 month, max 3 months), plus credit card processing fees (when credit card is used at checkout). Seller will be at 15% during the initial month. The Tier will be reset for each seller on the first day of the new month and applicable for the full month. Tiers will be universal and not seller specific.

History of tiers of a seller for each month should be stored in the database.

VM Seller - Dashboard should be displayed the below table only for VM seller's with method 2 as VM fee method with the current level. For Method 1 VM sellers, only the fixed fee % should be displayed.

Level	Fee	Product Sales
Bronze	15%	$0 - $10,000.00
Silver	12%	$10,000.01 - $20,000.00
Gold	10%	$20,000.01 - $30,000.00
Platinum	8%	$30,000.01+

Example: Seller is Level Gold.

Product Sales	$1,525
Shipping	$ 15
Total Order	$1,540

MatchSquare Fee = $152.50 ($1,525 * 10%)

CC Processing Fee = $46.45   ($1,540 * 3% + $0.25)

Fee Total = $198.95

Settlement to Seller $1,341.05 ($1,540.00 - 198.95)

We will settle with each seller on the 15th of the current month for all completed transactions from the previous month, based on completed date.

MatchSquare will provide a tiered fee structure **unique to each vendor**. The tiers will be visible in the Seller Profile and only modified by the SF back office user with appropriate user rights. Credit card processing fees will be standard in all tiers when a credit card is used as the payment method. The credit card fees will be managed in the configuration file and will be a % of total order value (including shipping) plus a transaction fee. For example - 3% plus $0.25. All credit card fees related to purchases, refunds, and additional charges (i.e return shipping) will be paid by the vendor in the monthly ACH settlement.

The tier is based on the average monthly product completed sales (order completed date and sum of item value) for the previous “X” calendar months (Min 1 month, max 3 months). Credit card processing fees (when credit card is used at checkout), Shipping fee, VM fee should not be included for tier calculation. The Tier will be reset for each seller on the first day of the new month and applicable for the full month.

History of tiers of a seller for each month should be stored in the database.

VM Seller - Dashboard should be displayed the below table as VM fee method with the current level identified as “Active”.

For example, vendor is currently Tier 3.

Fee (Variable by Vendor) Product Sales (Variable by Vendor)

Tier 1 15% $0 - $10,000.00

Tier 2 12% $10,000.01 - $20,000.00

Tier 3 Active 10% $20,000.01 - $30,000.00

Tier 4 8% $30,000.01+

Product Sales $1,525

Shipping $ 15

Total Order $1,540

MatchSquare Fee = $152.50 ($1,525 * 10%)

CC Processing Fee = $46.45 ($1,540 * 3% + $0.25)

Fee Total = $198.95

Settlement to Seller $1,341.05 ($1,540.00 - 198.95)

We will settle with each seller on the 15th of the current month for all completed transactions from the previous month, based on completed date.

VM order details page for Seller:

Example

Item Total = $100.00

MatchSquare Fee = $10.00

CC Fee = $3.25

Credit = $86.75

If there are any additional CC transactions related to the order, the CC fee should be added to the “CC Fee” field.

FO Reports:

The reports will have a new columns “CC Fee” for the VM Sellers.

Salesforce:

The following pages will have a new field “CC Fee”

1. Order details page
2. Order list page
3. BO Revision page (values will change based on the revision)
4. Admin and Sales Rep Dashboard report
5. Revenue Report

Fee % will also be based on the tier on order date even with the item value changes due to revision on a later date.

I discussed with Johny how to handle VM returns as it relates to the VM fee.   The debit to the seller will be net of the VM fee. Example:

Original sale:

$100 charged to buyer (free shipping)

Seller is at 10% Fee

At period end, ACH settlement to seller from MatchSquare Escrow Account = $90.

MatchSquare fee transferred from MatchSquare Escrow Account to General Account = $10 (15h of the month for previous months completed orders).

I discussed with Johny how to handle VM returns as it relates to the VM fee.   The debit to the seller will be net of the VM fee. Example:

Original sale:

$100 charged to buyer (free shipping)

Seller is at 10% Fee

At period end, ACH settlement to seller from MatchSquare Escrow Account = $90.

MatchSquare fee transferred from MatchSquare Escrow Account to General Account = $10 (15h of the month for previous months completed orders).

30 days later (after seller is settled for the previous months transactions), seller agrees to full buyer return and receives the item from the buyer. Buyer gets $100 ACH credit paid from MatchSquare Escrow Account. Seller is debited $90 deposited into the escrow account and create a BO task (if possible) to transfer $10 from the general account into the escrow account, assuming we have transferred our fees from the MatchSquare escrow to the MatchSquare general cash account for completed orders.

30 days later (after seller is settled for the previous months transactions), seller agrees to full buyer return and receives the item from the buyer. Buyer gets $100 ACH credit paid from MatchSquare Escrow Account. Seller is debited $90 deposited into the escrow account and create a BO task (if possible) to transfer $10 from the general account into the escrow account, assuming we have transferred our fees from the MatchSquare escrow to the MatchSquare general cash account for completed orders.

Evaluation:

Estimated hour	
Estimated impact on schedule (Working Days)	To be developed after completion of Project 1
Project Manager's disposition - Approved (Y/N)	
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	
Approved by (Customer Representative)	
Approved by (HTC Representative)	

If not approved by the customer, describe actions to be taken:

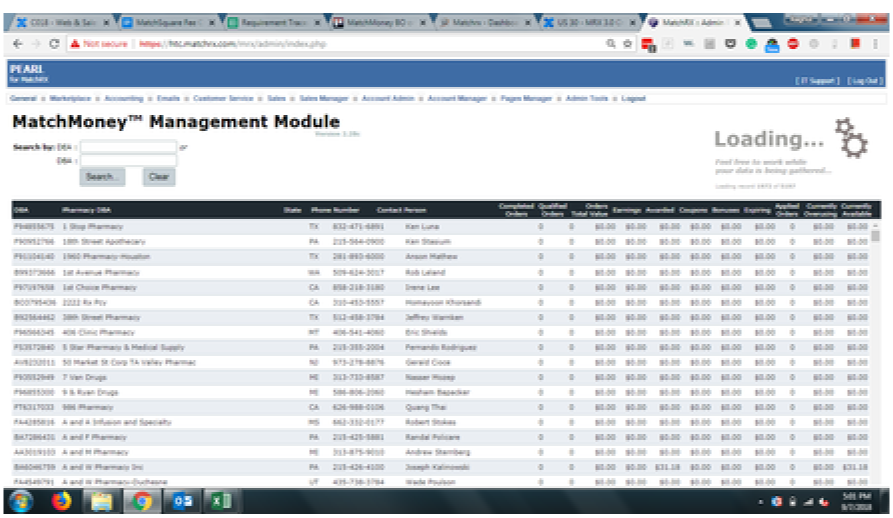
C018 - Web & Salesforce- MatchMoney

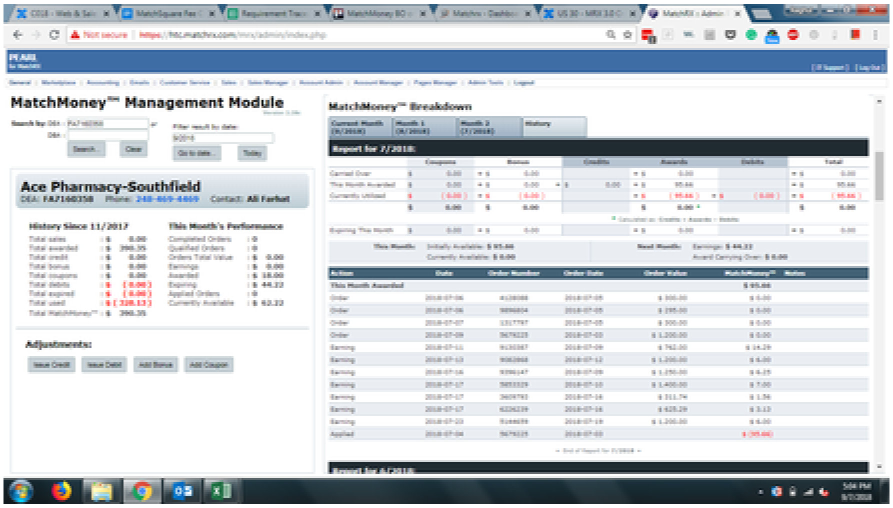
Requested Date	07 Sep 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	DRAFT
Approved (Y/N)	

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

Salesforce:





Page 2 - Section 1

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
Filter Results by month	JAN-2018	(MMM-YYYY) Calendar	Current month and year	M	Calendar	When a particular month is selected, Page 2 - section 2 and 3 results should be updated to the range NOV-2017 to the selected month. An additional button "Today" should select the current month and year. Page 2 - section 2 and 3 results should be updated to the range NOV-2017 to the current month.

Page 2 - Section 2

Field Name	Example	Data Type	Default Value	M/O/R*	Control Type	Remarks
Pharmacy DBA	ABC Pharmacy			R		Hyperlink to the account page
DEA	AB1234567			R		
Phone						Primary contact phone number
Contact	John Smith			R		Primary contact First and last name hyperlinked to contact page
History since NOV - 2017						
Total Sales				R		
Total Awarded						
Total Credit						
Total Bonus						
Total Coupons						
Total Debits						
Total Expired						
Total Used						
Total MatchMoney						
This Month's Performance						
Completed Orders						
Qualified Orders						
Order Total Values						
Earnings						
Awarded						

Expiring						
Applied Orders						
Currently Available						

Page 2 - Section 3

This section will have four tabs.

1. Selected month in page 2 - section 1
2. Previous month
3. The month prior to previous months
4. History (All months from Nov-2017 to selected month in page 2 - section 1)

Each month will have the following field.

Field Name	Example	Data Type	Default Value	M/O/R*	Control Type	Remarks
Report for MMM-YYYY						

Page 2 - Section 4 - Adjustments

Four buttons:

1. Issue Credit
2. Issue Debit
3. Add Bonus
4. Add Coupons

Each button will have the following fields.

Field Name	Example	Data Type	Default Value	M/O/R*	Control Type	Remarks
Order ID						
Date	JAN-2018	(MMM-YYYY) Calendar	Current month and year	R	Calendar	
Amount	$12.34	Currency with two decimals	Empty	R	Currency field	
Notes						

Evaluation:

Estimated hour	
Estimated impact on schedule (Working Days)	To be developed after completion of Project 1
Project Manager's disposition - Approved (Y/N)	
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	
Approved by (Customer Representative)	
Approved by (HTC Representative)	

If not approved by the customer, describe actions to be taken:

C019 - Web VM Wordpress

Requested Date	26 Jul 2018

Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	BEING EVALUATED
Approved (Y/N)	

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

The web application should make the following changes

VM Wordpress:

VM WordPress UI theme should be significantly different from the MatchRX WordPress theme. Except for a few pages, most pages will have a different layout. The sitemap for both MatchRX and VM WordPress site is attached.

MatchRX - MatchRx-3.0-sitemap_v7_KP copy.pdf

VM - MatchRx-VM-sitemap_v7_KP_copy.pdf

Evaluation:

Estimated hour	
Estimated impact on schedule (Working Days)	To be developed after completion of Project 1
Project Manager's disposition - Approved (Y/N)	
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	
Approved by (Customer Representative)	
Approved by (HTC Representative)	

If not approved by the customer, describe actions to be taken:

C020 - Web & SF - VM Seller Profile and VM Buyer Buy Again

Requested Date	26 Jul 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	BEING EVALUATED
Approved (Y/N)	

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

The web application should make the following changes

VM Seller Profile:

Logged in as VM Seller

1. A new tab "About Us" under My accounts should be added for VM Sellers
2. This new tab will have the below-mentioned fields for VM seller users to enter.
3. Only primary VM seller users will be able to update the information.
4. The below fields has to be displayed on Salesforce - VM Seller accounts page with the below mentioned business rules.

Field Name	**Example**	**Data Type**	**Default Value**	**M/O/R** *	**Control Type**	**Remarks**
						Section 1
Seller Name	Galaxy Enterprise		VM Seller DBA	R		
City	Royal Oak	Varchar (min 1, max 30)	VM Seller Billing City	M	Text field	
State	MI	Two letter state code	VM Seller Billing State	M	Drop down with two-letter state code	
Established in	2000	Drop down	Select	O	Drop down (1900 - current year)	
Highlights	Made in USA Eco-friendly Organic	Three lines of varchar (min 1, max 50 for each line)	Empty	O	Three lines of Text field with grey help text	
Our Story	We are a family owned business.....	varchar (min 1, max 1000)	Empty	O	Textbox	
Save & Reset All buttons					Buttons	Save will save all the above information. Reset will empty the fields "Highlights" & "Our Story" and set the default value for fields "City" & " State".
Image Upload				O	Drag & drop or button to upload a file.	Max file size is 2 MB. File type .png or .jpeg If the VM seller user doesn't upload an image, use the default image stored in our DB.
Image Update					Two buttons - Replace image & Delete image	BO user will only have the option to delete (soft delete) an image. The BO user will not have the ability to update or upload a new image.
						Section 2
Our products | X products	Our products | 12 products				R	Display the number of products available in the marketplace from this seller.
View All					Button	The page will display a maximum of 12 products. The VM seller user can click "View all" to view all the products from the seller. It will open in a new page with options to filter and sort. Default sort will be the newest item on top. This page will also have a back button. The VM seller user will be able to click on the product image to view the product details. The ability to add/remove from wishlist and "lat bought on" info will not be displayed.

Logged in as VM Buyer

1. A new menu "My Sellers" should be added on the left navigation pane for VM Buyers
2. This new menu will open a page and display a table with a list of sellers saved by any user of the VM buyer pharmacy.

3. When a VM buyer places an order, the VM sellers found in the order should be added to this list "My Sellers"

Field Name	Information
☐ (Checkbox)	To allow the VM buyer user to select multiple VM sellers and deleted the selected VM sellers from the table.
Seller Name	Display the VM Seller DBA. Hyperlinked for the VM buyer to view the seller profile page. The system should open the seller profile page on a new page.
Date Saved	Date on which the VM buyer saved the seller
Number of Products	Number of unique postings displayed in the marketplace from this seller. Hyperlined to view all the products of the seller. When the VM buyer user clicks this hyperlink, the system should display the Buy page with the specific seller populated and applied in the seller filter. Default sort will be the newest item on top.

The VM Buyer user should be able to

1. Select multiple sellers
2. Sort using all the above fields (except View) across all pages. The user should be able to sort based on the checkbox field as well.
3. Options to select all sellers (display number of sellers selected), select none and delete selected NDCs

VM Seller profile page as viewed by VM Buyer

Field Name	Example	Remarks
	Section 1	
Seller Name	Galaxy Enterprise	
City	Royal Oak	
State	MI	
Established in	2000	
	Eco-friendly Fast shipping Friendly returns	Display the information mentioned in "Highlights" fields entered by VM Seller. If one or more lines were not entered by VM Seller, it will be empty for VM Buyer
Our Story	We are a family owned business.....	
Image		
	Section 2	
Our products | X products	Our products | 12 products	Display the number of products available in the marketplace from this seller.
View All		The page will display a maximum of 12 products. The VM buyer user can click "View all" to view all the products from the seller. The system should display the Buy page with the specific seller populated and applied in the seller filter. Default sort will be the newest item on top.

VM Buyer - Buy Again tab

On the VM Buy page, a new tab "Buy Again" should be added in addition to the existing four tabs All products, Popular items, New Products, Promo.

Pre-defined filter	Rules
Buy again	Displays the products in the marketplace that has the same UPC and sold by the same seller as previously purchased by the member (not user). This should include UPCs which are found in open orders and canceled orders.

Evaluation:

Estimated hour	
Estimated impact on schedule (Working Days)	To be developed after completion of Project 1
Project Manager's disposition - Approved (Y/N)	
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	
Approved by (Customer Representative)	
Approved by (HTC Representative)	

If not approved by the customer, describe actions to be taken:

On Hold - Salesforce- IP Telephone

Requested Date	11 Jul 2018
Requested by	Mike Galloway
Request created by	Raghul Manoharan
Status	CANCELED
Approved (Y/N)	

Status key: DRAFT OPEN BEING EVALUATED AWAITING APPROVAL APPROVED IMPLEMENTED

Description:

Salesforce application should integrate with an IP telephony platform and provide the following features

1. Softphone
2. Caller ID to identify and pull the customer record on salesforce screen when a customer calls
3. Run reports per employee - # of calls, average call time etc.
4. Call monitoring - Admin can listen to live phone calls
5. Call recording
6. Transfer Calls
7. Voicemails (accessible remotely) - sends an email automatically (transcribe)
8. Put on hold
9. Phone tree - call mapping -
   A. How the call is distributed among the employees.
   B. Press 1 for MRX, 2 for VM
10. Out of office/vacation message
11. Multiple inbound phone numbers
12. Call forwarding
13. Ability to assign extn numbers.
14. Ability to use remotely. E.g. An employee working from home.

Evaluation:

Estimated hour	
Estimated impact on schedule (Working Days)	To be developed after completion of Project 1
Project Manager's disposition - Approved (Y/N)	
Project Manager's disposition - Deferred (Y/N)	
Is the change request approved by the customer (Y/N)	
Approved by (Customer Representative)	
Approved by (HTC Representative)	

If not approved by the customer, describe actions to be taken:

Decision log

Create decision

Decision	Status	Stakeholders	Outcome	Due date	Owner
Tech Stack	DONE	Julio Marchi Ramen Das Raghul Manoharan Ramprakash		08 Jun 2018	Ramen Das

File lists

Create file list

Title	Creator	Modified
Mobile	Ramprakash	12 minutes ago
MRx	Ramprakash	13 minutes ago
VM	Ramprakash	13 minutes ago
Deployment Process and Steps	Ramen Das	yesterday at 3:02 PM
UI - Web	Raghul Manoharan	May 04, 2018
Dependencies for Sprint 9	Ramprakash	Feb 17, 2018
Dependencies for Sprint 8	Ramprakash	Feb 17, 2018
Dependencies for Sprint 7	Ramprakash	Feb 17, 2018
Project Documents	Ramprakash	Jan 03, 2018
Dependencies for Sprint 3	Ramprakash	Jan 03, 2018
Dependencies for Sprint 6	Ramprakash	Jan 03, 2018
Dependencies for Sprint 5	Ramprakash	Jan 03, 2018

Dependencies for Sprint 4	Raghul Manoharan	Jan 03, 2018
Design Source Files	Saravanan	Nov 15, 2017
Approved UX Designs	Saravanan	Nov 10, 2017
Documents for Review	Muthukumar G	Nov 02, 2017
Content for Discussion	V	Oct 31, 2017

Approved UX Designs

File	Modified
US1-Registration-3.0andVMandGuest_V5.pdf	Nov 10, 2017 by Saravanan
US4-SINGLE-SIGN-ON.pdf	Nov 10, 2017 by Saravanan
US3-Guest-Login-Forgot-password.pdf Raghul should approve this document	Nov 15, 2017 by Muthukumar G
US1-Registration-3.0andVMandGuest_V6.pdf	Nov 15, 2017 by Saravanan
US 6 - VM-Shipping-address-V1.pdf	Mar 08, 2018 by Raghul Manoharan
US 30 - MRX-My-Orders-V7 - pending approval.pdf	Mar 08, 2018 by Raghul Manoharan

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Content for Discussion

File	Modified
user_registration_db_design_draw.io.xml	Oct 26, 2017 by V
MatchRX API.docx	Oct 30, 2017 by Muthukumar G
mrx_user_management.jpg	Oct 31, 2017 by V
DeploymentPPT.png	Oct 31, 2017 by Muthukumar G
user_registration_vm_post_item.jpg	Nov 07, 2017 by V
user_registration_vm_post_item_updated_07_11_2017.xml	Nov 07, 2017 by V
mrx_schema_design.jpg	Nov 07, 2017 by V
mrx_schema_design_updated_07_11_2017.xml	Nov 07, 2017 by V
PHP_API.odt	Nov 21, 2017 by Varun Sankaranarayana

Salesforce_IP_Details.docx	Nov 28, 2017 by Swapna.Patnaikuni
MobileApp_Webservice-List-5thDec2017.docx	Dec 05, 2017 by Maguesh Balakrishnan
VM_Seller_Registration.odt	Dec 12, 2017 by V
DataQ_API_to_Salesforce.docx	Dec 14, 2017 by rajasekar.jeyakumar@htcindia.com
refreshtoken_login.docx	Dec 22, 2017 by rajasekar.jeyakumar@htcindia.com
MRX_DEV.postman_collection.json1	Jan 02, 2018 by Poovarasan
sprint4_webservices.docx	Jan 02, 2018 by rajasekar.jeyakumar@htcindia.com
Medispan_API_to_Salesforce.docx	Jan 04, 2018 by rajasekar.jeyakumar@htcindia.com
APIS.odt	Jan 05, 2018 by Poovarasan
sprint4_5_webservices.docx	Jan 18, 2018 by rajasekar.jeyakumar@htcindia.com
sprint5_SF_API_stub.docx	Jan 23, 2018 by rajasekar.jeyakumar@htcindia.com
Sprint 5 API Mobile.docx	Jan 29, 2018 by rajasekar.jeyakumar@htcindia.com
Sprint 5 API WEB.docx	Feb 02, 2018 by rajasekar.jeyakumar@htcindia.com
Pending_devItems.xlsx	Feb 07, 2018 by Swapna.Patnaikuni
FedEx_WebServices_DevelopersGuide_v2017.pdf	Feb 15, 2018 by Poovarasan
Sprint 6 Wishlist API.docx	Mar 07, 2018 by Ramprakash
sprint_67.docx	Mar 12, 2018 by Ramprakash
sprint_7_webservices.docx	Mar 14, 2018 by Ramprakash
Salesforce_APIs.docx	Jun 05, 2018 by Swapna.Patnaikuni

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Design Source Files

File	Modified

File	Modified
Match-RX-FO_Home-V11-tosend_Folder.zip	Nov 15, 2017 by Saravanan
MRX-Dashboard-V5_Folder.zip	May 15, 2018 by Saravanan
RPC Calls (including MMS calls).zip Source code for MMS integration - Service calls	May 16, 2018 by Ramen Das
Emails_All.pdf	Jul 31, 2018 by Ramprakash

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Documents for Review

Architecture descriptions to support implementations

File	Modified
API Catalogue_Technical Approach.docx	Nov 02, 2017 by Muthukumar G
Data Connector_Technical Approach.docx	Nov 02, 2017 by Muthukumar G
API Security_Technical Approach.docx	Nov 02, 2017 by Muthukumar G
API Gateway_Technical Approach.docx	Nov 02, 2017 by Muthukumar G

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Project Documents

File	Modified
matchrx_member_registration_flow_v1.0.png	Jan 03, 2018 by deepak.sharma
MatchRX_Salesforce_ERD_v1.2.png	Jan 03, 2018 by deepak.sharma
MatchRx-DesignDoc v0.2.xlsx	Jan 03, 2018 by deepak.sharma
DCF_SPRINT1_RE_REVIEW.xls	Mar 26, 2018 by Ramprakash

DCF_SPRINT1.xls	Mar 26, 2018 by Ramprakash
Code_Reviews.zip	Apr 26, 2018 by Ramprakash

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General Dependency

Upload New File

Sprint 5 (Jan 15 - Feb 2)

File Name
No content found.

Sprint 4 (Dec 25 - Jan 12)

- Dependencies for Sprint 4 (MatchRX - HTC) —

File	Modified
APIsListSprint_Sprint 4.xlsx	Jan 03, 2018 by Ramprakash

file-list sprint-4

Dependencies for Sprint 3

File	Modified
APIsListSprint_3.xlsx	Jan 03, 2018 by deepak.sharma

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Dependencies for Sprint 4

File	Modified
APIsListSprint_Sprint 4.xlsx	Jan 03, 2018 by Ramprakash
Mobile-API Team Dependency_Sprint 4.xlsx	Jan 03, 2018 by Maguesh Balakrishnan
APIsListSprint_4_Updated.xlsx	Feb 17, 2018 by Ramprakash

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Dependencies for Sprint 5

File	Modified
Mobile-API Team Dependency_Sprint 5.xlsx	Jan 17, 2018 by Maguesh Balakrishnan
sprint5_SF_API_stub.docx	Jan 23, 2018 by Poovarasan
SF_DependencyList_Sprint_5_v1.xlsx	Jan 24, 2018 by Swapna.Patnaikuni

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Dependencies for Sprint 6

File	Modified
Mobile-API Team Dependency_Sprint 6.xlsx	Feb 12, 2018 by Maguesh Balakrishnan
SF_DependencyList_Sprint6_v1.xlsx	Feb 13, 2018 by deepak.sharma

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Dependencies for Sprint 7

Dependencies for Sprint 8

Dependencies for Sprint 9

How-to articles

Add how-to article

Title	Creator	Modified
Technical	Ramen Das	yesterday at 2:51 PM

Meeting notes

Create meeting note

Incomplete tasks from meetings

Description	Due date	Assignee	Task appears on
Salesforce will convert a prospect only document approval done in MMS			MMS Discussion - 20th June, 2018
While doing, they will call MatchRX to create Pharmacy/Company, along with Bank Name, Last four digits of Bank Account Number			MMS Discussion - 20th June, 2018
Updated pharmacy_id/company_id, will get updated in salesforce in return			MMS Discussion - 20th June, 2018
Match money code walk-through and design			Tech Discussion - 7th June, 2018
In page editing code			Tech Discussion - 7th June, 2018
Julio Marchi : Revised Medispan data structure (Including shape etc.)		Julio Marchi	Sprint 7 - Week 2 Review
Raghul Manoharan - IP Phone integration with Salesforce - Out of scope - HTC to explore.		Raghul Manoharan	Steering Committe Meeting

Muthukumar G : Zeamster - API Integration plan	Muthukumar G	Sprint 5 - Week 2 Review
Muthukumar G : DB Design should be updated and confirmed till next milestone [Sprint #6]	Muthukumar G	Sprint 3 - Week 2 Review

Completed tasks from meetings

Description	Completed date	Assignee	Task appears on
Approved by Julio Marchi	30 May 2018	Julio Marchi	Tech Stack
Raghul Manoharan : To provide checklist of technical items and requirement tractability matrix to be approved for Milestone 2.	21 May 2018	Raghul Manoharan	Sprint 10 - Week 2 Review
Raghul Manoharan : DB Design Confirmation for Sprint 7 requirements	21 May 2018	Raghul Manoharan	Sprint 7 - Week 2 Review
Raghul Manoharan : MMS Approach confirmation from Nowfal	20 Mar 2018	Raghul Manoharan	Sprint 7 - Week 2 Review
Raghul Manoharan : Share updates on Change Request and place them in Confluence.	13 Mar 2018	Raghul Manoharan	Sprint 7 - Week 1 Review
Raghul Manoharan - Upload Change Request documents to Confluence.	13 Mar 2018	Raghul Manoharan	Steering Committe Meeting
Raghul Manoharan : CMS for MatchRX - Further Actions Plan	02 Feb 2018	Raghul Manoharan	Sprint 5 - Week 2 Review
Raghul Manoharan : DB Design Review (Sprint #4, #5 and #6) | based on updated plan	13 Feb 2018	Raghul Manoharan	Sprint 5 - Week 1 Review
Medispan : Updated Data	09 Apr 2018		Sprint 5 - Week 1 Review
Muthukumar G : Provide Fedex API version number	02 Jan 2018	Muthukumar G	Sprint 4 - Week 2 Review
Raghul Manoharan , Muthukumar G : Make sure Staging server is ready for deployment	02 Jan 2018	Raghul Manoharan	Sprint 4 - Week 2 Review
Mike Galloway : Routing/Bank Name API Credentials	23 Jan 2018	Mike Galloway	Sprint 4 - Week 1 Review
Mike Galloway : MMS Cloud Credentials	20 Mar 2018	Mike Galloway	Sprint 3 - Week 3 Review
Raghul Manoharan : Routing/Bank Name API Credentials	26 Dec 2017	Raghul Manoharan	Sprint 3 - Week 3 Review
	19 Dec	Muthukumar G	Sprint 3 -

Muthukumar G : ABA API - Need a discussion	2017		Week 2 Review
☑ Raghul Manoharan : Salesforce and Fedex integration	14 May 2018	Raghul Manoharan	Sprint 3 - Week 2 Review
☑ Karen Pegg : User access to Apple app store account	12 Dec 2017	Karen Pegg	Sprint 3 - Week 2 Review
☑ Julio Marchi : DB design confirmation required.	12 Dec 2017	Julio Marchi	Sprint 3 - Week 2 Review
☑ Mike Galloway : Need confirmation on MMS Cloud	09 Jan 2018	Mike Galloway	Sprint 3 - Week 2 Review
☑ Raghul Manoharan to get Developer account for iOS Development and Deployment	12 Dec 2017	Raghul Manoharan	Sprint 3 - Week 1 Review

All meeting notes

Title	Creator	Modified
Sprint 16 - Week 3 Review	Raghul Manoharan	Sep 25, 2018
Sprint 16 - Week 2 Review	Raghul Manoharan	Sep 18, 2018
Sprint 16 - Week 1 Review	Raghul Manoharan	Sep 11, 2018
Sprint 15 - Week 3 Review	Raghul Manoharan	Sep 04, 2018
Sprint 15 - Week 2 Review	Raghul Manoharan	Aug 28, 2018
Sprint 15 - Week 1 Review	Raghul Manoharan	Aug 21, 2018
Sprint 14 - Week 3 Review	Raghul Manoharan	Aug 14, 2018
Tech Discussion - 9th Aug, 2018	Ramen Das	Aug 13, 2018
Sprint 14 - Week 2 Review	Raghul Manoharan	Aug 07, 2018
Sprint 14 - Week 1 Review	Raghul Manoharan	Jul 31, 2018
Tech Discussion - 24th July, 2018	Ramen Das	Jul 26, 2018
Sprint 13 - Week 3 Review	Raghul Manoharan	Jul 24, 2018
Tech Discussion - 19th July, 2018	Ramen Das	Jul 20, 2018
Tech Discussion - 18th July, 2018	Ramen Das	Jul 19, 2018
Tech Discussion - 17th July, 2018	Ramen Das	Jul 19, 2018
MMS Discussion - 17th July, 2018	Ramen Das	Jul 19, 2018
Sprint 13 - Week 2 Review	Raghul Manoharan	Jul 17, 2018
Tech Discussion - 5th July, 2018	Ramen Das	Jul 17, 2018
Tech Discussion - 12th July, 2018	Ramen Das	Jul 16, 2018
Sprint 13 - Week 1 Review	Raghul Manoharan	Jul 12, 2018

Find more results

MMS Discussion - 17th July, 2018

Date

17 Jul 2018

Attendees

- Raghul Manoharan
- Ramen Das
- Swapna.Patnaikuni
- Nowfal

Goals

- Integration specification walk-through

Discussion items

Time	Item	Who	Notes
10 min	MRX service consumed by MMS	Ramen Das Nowfal	• Nowfal suggested couple of changes in the service response which includes renaming the JSON files with “Bank” appended and leaving main JSON as it is.
15 min	Miscellaneous	All	• Nowfal shared his IP addresses to be whitelisted • Nowfal will send the IPs to Deepak for whitelisting • Deepak will send his subnet IPs to Nowfal for whitelisting • Nowfal will provide the callback URL to the Salesforce team • Nowfal suggested to wait for couple of days if we can reconvene sometime this week again to clarify unanswered questions

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

MMS Discussion - 20th June, 2018

Date

20 Jun 2018

Attendees

- Raghul Manoharan
- Swapna.Patnaikuni
- Ramen Das
- Senthil
- Nowfal

Goals

- Clarify and approval from Nowfal about design decisions

Discussion items

Document Processing:

1. **MatchRX to MMS:** User update account details with and without document upload
    a. While uploading document, a JSON file will be created with following information. Example: **/12345/12345.json**
        i. Application Number
        ii. Name (Legal Entity)
        iii. DBA
        iv. DEA
        v. NOTE: This JSON will be overwritten with latest information provided by user
    b. With ACH FORM
        i. Document will be uploaded in the naming convention given by Nowfal
        ii. Like /<APPID>/<APPID>_ach_time().<EXTENSION>.
            1. Example: **/12345/12345_ach_1312323.pdf**
            2. Example: **/12345/12345_ach_1312323.jpg**
        iii. Also will a JSON file with following information. Example: **/12345/12345_ach_1312323.json**
            1. Account Number
            2. Routing Number
            3. Financial Institution
            4. Account Type
            5. ACH Form Uploaded : true
            6. Date
        iv. If another ACH form uploaded, then we will create another JSON file. For each upload, we will have separate JSON with account details
            1. Example: **/12345/12345_ach_2323233.pdf**
            2. Example: **/12345/12345_ach_2323233.json**
    c. With Canceled Check
        i. Only Cancelled check uploaded in the given format. No additional JSON for it.
        ii. Example: **/12345/12345_cc_2323233.pdf**
    d. With Tax-exempt form
        i. Only Tax-exempt uploaded in the given format. No additional JSON for it.
        ii. Example: **/12345/12345_TAX_2323233.pdf**
    e. Without any document
        i. A JSON will be created with following details
            1. Account Number
            2. Routing Number
            3. Financial Institution

4. Account Type
5. ACH Form Uploaded : false
6. Date

ii. Example: **/12345/12345_ach_3434344.json**

2. **MatchRX to Salesforce**: Notifications
    a. MatchRX will notify Salesforce when above action takes place
    b. Salesforce will provide an API to MatchRX for this notification
3. **Salesforce to MMS**: Task creation
    a. Salesforce will inform MMS by creating internal task based on the notification received from MatchRX
4. **MMS to Salesforce**:
    a. MMS will read the document uploaded in Amazon
    b. MMS will provide option to verify document
        i. While doing MMS will call salesforce API to update Application status. For which salesforce will provide OAuth Rest API process document
    c. MMS will also have option to approve
        i. While doing MMS will call salesforce API to update Application status. For which salesforce will provide OAuth Rest API process document
5. **Salesforce to MatchRX**:

- [ ] Salesforce will convert a prospect only document approval done in MMS
- [ ] While doing, they will call MatchRX to create Pharmacy/Company, along with Bank Name, Last four digits of Bank Account Number
- [ ] Updated pharmacy_id/company_id, will get updated in salesforce in return

6. MatchRx to MMS:

1. MatchRX will update pharmacy_id/company_id in the json file stored in Amazon.

Transaction process:

1. **MatchRX to MMS:**
    a. Have provided OAuth process
2. **MMS to MatchRX**:
    a. **Transaction Export**:
        i. MMS will call the OAUTH Rest API (**/api/v3/export**) to get transactions to be present to bank
        ii. In the response, Nowfal asked to send application number, so instead of updating in JSON (to avoid document process Step 6)
        iii. We also need to add pharmacy_id, company_id
    b. **Transaction Processed**:
        i. Once transaction processed in Bank, MSS will update MatchRX
        ii. MMS will call API (**/api/v3/processed/?transaction_id=123,124,125**) and update ach_id, ach_date
3. **MatchRX to Salesforce**:

When ACH details updated, then same will be updated in Salesforce

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

MMS Discussion - 24th May, 2018

Date

Attendees

- Raghul Manoharan
- Nowfal Akash
- Ramen
- Senthil

Goals

- MMS design clarification

Discussion items

Date	Item	Who	Notes	Status/Decision
05/24	Nowfal gave a code walkthrough	Nowfal	• Walked through of _ach.php, _member.php and _bank.php files • Explained methods/functions to be used in the MatchRX application • Nowfal noticed few code updates which might have happened recently. Nowfal would clarify that with Julio. • Nowfal might get an answer from Julio about the changes • HTC offshore not sure if_member.php implementation could be used in MatchRX 3.0 or not • Auth key can be modified in the existing implementation to accommodate a new access code generated by MatchRX 3.	Done
05/24	Documents upload in S3	Nowfal	• Ramen/Senthil wanted to know process to be followed to upload ACH documents • Nowfal suggested to write a service to upload and get a notification • Then MMS will process the documents (verification) and notify to the Salesforce application • There was a confusion if document verification is done by MMS or Salesforce. If any verification needed, either Salesforce or MatchRX has to build a service for MMS to notify the MatchRX. • Raghul suggested to have a separate discussion with Ramen and Senthil to have some a design discussion that Raghul might have already aware of.	In Progress

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

MMS Discussion - 26th June, 2018

Date

26 Jun 2018

Attendees

- Raghul Manoharan
- Swapna.Patnaikuni
- Ramen Das
- Nowfal
- Senthil

Goals

- MMS integration clarification

Discussion items

Time	Item	Who	Notes
25 min	Integration specification walkthrough	Raghul Manoharan	• Explained about the processes involved between MMS/SF/MRX • Explained about Financial Systems
15 min	Correction made in the Integration Specification	Nowfal	• Few points added/updated to be more understandable
15 min	Miscellaneous	All	• HTC will review the updated documents • The team would reconvene again on next Tuesday

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Sprint 1 - Week 1 Review

Date

24 Oct 2017

Attendees

- Raghul Manoharan
- Muthukumar G
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goal

- Sync MRX and HTC teams

Discussion items

Time	Item	Who	Notes
2 min	What was done last week - MRX	Raghul Manoharan	• Worked on 6 user stories in Sprint 0. About 90% complete.
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Plan to finalize the above 6 user stories and start discussing 5 more.
2 min	What was done last week - HTC	Muthukumar G	• Did ground work on team set up
2 min	What's the plan for this week - HTC	Muthukumar G	• Work with Julio Marchi to finalize few technical backlog items of Sprint 1
10 min	Discussion on UI design approval	Raghul Manoharan	• Made Mike Galloway and Karen Pegg aware that we should have the next sprint UI design finalized and approved as a part of user story approval.
2 min	JIRA walk through	Raghul Manoharan	• Done
2 min	Confluence walk through	Raghul Manoharan	• Done
2 min	Trello Walk through	Raghul Manoharan	• Done

Action items:

Sprint 1 - Week 2 Review

Date

31 Oct 2017

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	Sprint 2 User stories approved
2 min	What's the plan for this week - MRX	Raghul Manoharan	Reviewing Sprint 3 user stories
3 min	What was done last week - HTC	Muthukumar G	Architecture confirmation discussions for 1. Core API Services Security 2. Service Catalogue 3. Data Connector 4. RESTFUL - API Integration with SalesForce 5. Database Design for User Registration 6. Data Translation Layer 7. Architecture Testing approach
2 min	What's the plan for this week - HTC	Muthukumar G	Development of • Core API Services Security • Service Catalogue • Data Connector • RESTFUL - API Integration with SalesForce • Data Translation Layer • Database design confirmation for Sprint 2 and 3 tasks
5 min	Any bottlenecks	Raghul Manoharan	• Viktor, who is required for infrastructure discussion, is sick and out of office. Julio and Muthu are confident that this will not affect the schedule.
10 mins	Data requirements for next sprint	Bharath Devanathan	• DataQ database to be made ready by Julio • Raghul to discuss with Muthu to identify the tables required for testing
5 mins	Walk-ins		• Mike mentioned that he is happy with the project's progress

Action items

- [x] Raghul Manoharan to identify tables required for testing in Sprint 2.
- [x] Julio Marchi to provide DataQ database

Issues

#	Description	Mitigation plan	Assigned to
	None		

Risks

#	Description	Mitigation plan	Assigned to
	None		

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 1 - Week 3 Review

Date

07 Nov 2017

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	Sprint 3 user stories - 90% complete Sprint 2 - Test data requirement - 75% complete Sprint 2 Wire-frame - 50% complete
2 min	What's the plan for this week - MRX	Raghul Manoharan	Sprint 4 user stories Sprint 2 wire-frame Sprint 2 Test data requirement Call with Nowfal
3 min	What was done last week - HTC	Muthukumar G	Architectural components completed. Sprint 2 DB finalized
2 min	What's the plan for this week - HTC	Muthukumar G	Testing Architectural components Finalizing Test strategy Sprint 3 & 4 DB will be finalized MMS discussion
5 mins	Bottlenecks, Issues and Risks	Raghul Manoharan	No issues Sprint 1 - 80%

Action items

- [x] Raghul Manoharan & Muthukumar G - Call with Nowfal on MMS integration

Issues

#	Description	Mitigation plan	Assigned to
	None		

Risks

#	Description	Mitigation plan	Assigned to
	None		

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 2 - Week 1 Review

Date

14 Nov 2017

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 3 user stories approved • Sprint 4 user stories - 25% complete • Task complete - Identifying test data requirement for Sprint 2
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 4 user stories - 75% • CR for mobile transition screen
3 min	What was done last week - HTC	Muthukumar G	• Dev and testing for architecture • Sprint 1 complete
2 min	What's the plan for this week - HTC	Muthukumar G	• Sprint 2 development has started
5 min	Bottlenecks / Issues / Risks	Raghul Manoharan	• Over usage of softwares.
	Other discussions	Raghul Manoharan	• Static Pages User Story Readiness

Action items

- [x] Raghul Manoharan to provide plan for the Atlassian softwares
- [x] Mike Galloway to inform when MatchRX will be ready with Static pages content

Issues

#	Description	Mitigation plan	Assigned to
	N/A		

Risks

#	Description	Mitigation plan	Assigned to
	N/A		

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 2 - Week 2 Review

Date

21 Nov 2017

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 4 user stories - 75% • Call with Nowfal to coordinate MMS • CR for mobile transition screen
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 4 user stories - 100%
3 min	What was done last week - HTC	Muthukumar G	• Web Services Development for Sprint #3 - Started • UX for Sprint #3 - In Progress • Test Preparation for Sprint #2 - In progress • Mobile UI for Sprint #2 Tasks - Started • OAuth in SalesForce, BO User Setup and Web Services - Completed

2 min	What's the plan for this week - HTC	Muthukumar G	• Web Services and UI Development for Sprint #2 will be completed for QA • DataQ and MEDI SPAN Test data review • Web Services for Sprint #3 - Stubs and Skeletons will be ready • OAuth Integration and SFDC APEX Class to post data into MRX DB • UX for Sprint #3
5 min	Any Bottlenecks / Issues / Risks	Sprint 2 - Week 2 Review	• Raghul on vacation from 11/23 - 12/1. Raghul will be accessible through email from 11/27. Muthu will conduct 11/28 meeting.
	Other discussions		

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to
	N/A		

Risks

#	Description	Mitigation plan	Assigned to
	N/A		

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 2 - Week 3 Review

Date

28 Nov 2017

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	Sprint 4 - 100%
2 min	What's the plan for this week - MRX	Raghul Manoharan	MRX team will work design of home and static pages
3 min	What was done last week - HTC	Muthukumar G	Sprint #2 Development - New User Registration, Login with OAuth (Single Sign-On), Access Control List, Guest Login, Forgot password and Pharmacy Info. We faced integration issues between SalesForce and PHP due to connectivity approaches but fixed currently. Due to these integration issues there is a slight delay in delivery to QA environment. This may affect the schedule in integration of sprint #3 for the deployment in staging environment but we are working on it to manage it.
2 min	What's the plan for this week - HTC	Muthukumar G	Testing Sprint #2 DB Design Review for Sprint #3, #4 and #5 with Julio Staging Server environment setup with Viktor

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 3 - Week 1 Review

Date

08 Dec 2017

Meeting Canceled.

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• UI review • DB design review • SF data model discussion • MMS discussion with Nowfal
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 2 deliverable walk through • Sprint 5 user story discussion
3 min	What was done last week - HTC	Muthukumar G	• Sprint 2 PHP, Mobile and SalesForce Modules for User Registration, Guest User, Login, Forgot password, Access Control list & Pharmacy Information - Testing and Issue Fixing • Sales Force and PHP Connectivity issue fixing • MatchRX Staging Server Access received
2 min	What's the plan for this week - HTC	Muthukumar G	• Sprint 3 PHP, Mobile and SalesForce Development for VM Buyer and Seller Registration, SSO extentions, ACL, Company Information, E-Signature Update. • Sprint 3 Dependency Web Services • Sprint 3 Test Plan • DB Design Review for Sprint #4 and #5 • API dependency Tasks for FedEx • MediSpan Data Review

Action items

Raghul Manoharan to get Developer account for iOS Development and Deployment

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 3 - Week 2 Review

Date

12 Dec 2017

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes

3 min	What was done last week - MRX	Raghul Manoharan	Sprint 5 user stories - 20 % done Sprint 3 UI - 100%
2 min	What's the plan for this week - MRX	Raghul Manoharan	Sprint 2 walk through Sprint 5 user stories Sprint 4 UI
3 min	What was done last week - HTC	Muthukumar G	• Sprint 3 PHP, Mobile and SalesForce Development for VM Buyer and Seller Registration, SSO extentions, ACL, Company Information, E-Signature Update - Development started • Sprint 3 Dependency Web Services Development started • Sprint 3 Test Plan - In progress • DB Design Review for Sprint #4 and #5 • API dependency Tasks for FedEx • MediSpan Data Review • MMS - Reviewed
2 min	What's the plan for this week - HTC	Muthukumar G	• DB Design review and confirmation for Sprint #4 and Sprint #5 • MediSpan Data Review - Confirmation • Test Data discussion for Sprint #4 • Delivery to QA - Sprint #3 • Staging Server Deployment Validation • MRX 2.0 to 3.0 Data Migration Discussion • MMS - further actions discussions
	Other Discussions	Bharath Devanathan	• Requested that DB designs reviewed and finalized for upcoming milestone sprints as early as possible.

Action items

- [ ] Muthukumar G: DB Design should be updated and confirmed till next milestone [Sprint #6]
- [x] Muthukumar G: ABA API - Need a discussion
- [x] Mike Galloway: Need confirmation on MMS Cloud
- [x] Julio Marchi: DB design confirmation required.
- [x] Karen Pegg: User access to Apple app store account
- [x] Raghul Manoharan: Salesforce and Fedex integration

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

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RED – Project not on track and need a plan to bring it back on track

Sprint 3 - Week 3 Review

Date

19 Dec 2017

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 5 user stories - 75% • Sprint 4 UI - 80% • Karen provided access to App store and Google Play accounts • Julio provided DB design confirmation.
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 5 user stories completion • Sprint 4 UI completion
3 min	What was done last week - HTC	Muthukumar G	• DB Design review and confirmation for Sprint #4 and Sprint #5 • Delivery to QA - Sprint #3
2 min	What's the plan for this week - HTC	Muthukumar G	• HTC Testing Sprint #3 • MRX 2.0 to 3.0 Data Migration Discussion • MMS - further actions discussions • Staging Server Deployment Validation • MediSpan Data Review - Confirmation • Test Data discussion for Sprint #4 • Sprint #6 - WBS Planning and DB Design
5 min	Extending Sprint 4 by 1 week - Refer Issue #1	Raghul Manoharan	• MRX and HTC have mutually agreed to the mitigation plan.

Action items

- [x] Raghul Manoharan : Routing/Bank Name API Credentials
- [x]

Mike Galloway : MMS Cloud Credentials

Issues

#	Description	Mitigation plan	Assigned to
1	Extending Sprint 4 by 1 week to compensate for holidays	**Dec 26 (Tue) - Jan 5 (Fri)** - 8 working days - MRX performs UAT and provides feedback (at least once every two days) **Jan 8 (Mon) - Jan 12 (Fri)** - 5 working days - HTC fixes reported issues. (Also HTC can start working on fixes as and when reported between Dec 26 and Jan 5) **Jan 15 (Mon) - Jan 22 (Fri)** - 5 working days - MRX retesting the fixes and provides feedback. HTC fixes issues that are reported. MRX retests, approves and signs-off.	MRX and HTC have mutually agreed to the mitigation plan.

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 4 - Week 2 Review

Date

02 Jan 2018

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• UAT • Sprint 6 user stories - 10% • Sprint 5 UI discussion
2 min	What's the plan for this week - MRX	Raghul Manoharan	• UAT • Sprint 6 user stories • Sprint 5 UI discussion
3 min	What was done last week - HTC	Muthukumar G	• HTC Sprint #4 Stories into Tasks • MediSpan Data : 'View' Design discussion • Sprint #6 - DB Design [Updated in Dev Server] • API for FedEx [MRX Post] [Tested]
2 min	What's the plan for this week - HTC	Muthukumar G	• Staging Server Deployment • MediSpan: View final version • Development of Sprint #4 Tasks • DB Design for Sprint #4,#5 and #6 - Signoff

Action items

- [x] Muthukumar G: Provide Fedex API version number
- [x] Raghul Manoharan, Muthukumar G: Make sure Staging server is ready for deployment

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 4 - Week 3 Review

Date

09 Jan 2018

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	UAT round 1 - 100%
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 5 UI • Sprint 6 User stories
3 min	What was done last week - HTC	Muthukumar G	• Development of Sprint #4 Tasks • Delivery to QA
2 min	What's the plan for this week - HTC	Muthukumar G	• Staging Server Deployment UAT • MediSpan: View final version • DB Design for Sprint #4,#5 and #6 - Signoff • UAT issue Fixes • Sprint #4 Testing
2 min	Other discussion	Raghul Manoharan	CMS development • MatchRX will be ready by start of Feb to start the discussion. • User stories will be finalized by end of Feb • UI sample will be reveiwed during first half of March • Development start second half of March.
	Meeting	Raghul Manoharan	Next week (1/16) meeting canceled.

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 4 - Week 4 Review - Cancelled

Date

16 Jan 2018

Meeting Canceled.

Sprint 4 - Week 1 Review

Date

26 Dec 2017

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 5 user stories - 90% • Sprint 4 UI - 100%
2 min	What's the plan for this week - MRX	Raghul Manoharan	• UAT • Sprint 5 UI
3 min	What was done last week - HTC	Muthukumar G	• HTC Testing Sprint #3 • MRX 2.0 to 3.0 Data Migration Discussion • MMS - further actions discussions • MediSpan Data Review - Confirmation • Test Data discussion for Sprint #4 • Sprint #6 - WBS Planning

2 min	What's the plan for this week - HTC	Muthukumar G	• HTC Sprint #4 Stories into Tasks • Staging Server Deployment • MediSpan Data : 'View' Design discussion • Sprint #6 - DB Design • API for FedEx [MRX Post]
	Other dicussion	Raghul Manoharan	• Code ready in QA for UAT testing and code review

Action items

- [x] Mike Galloway: Routing/Bank Name API Credentials

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 5 - Week 1 Review

Date

23 Jan 2018

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• UAT Round 2 testing
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 6 User Stories • Sprint 6 UI • CMS Discussion
3 min	What was done last week - HTC	Muthukumar G	• UAT Issue fixing & Support • Sprint 4 Issue fixing & Support
2 min	What's the plan for this week - HTC	Muthukumar G	• Sprint 5 Development start • UAT Milestone 1 Sign-off • CMS Discussion • MMS File Storage Cloud Discussion • Zeamster Discussion
10 min	Medispan - Post an item	Raghul Manoharan, Mike Galloway, Julio Marchi	MatchRX agreed that apart from three fields (Brand vs generic, Package field, Multi vs single ingredient), HTC can use the same logic used in MRX 2.0 for Post an item and edit an item.

Action items

- [x] Medispan : Updated Data
- [x] Raghul Manoharan : DB Design Review (Sprint #4, #5 and #6) | based on updated plan
- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 5 - Week 2 Review

Date

30 Jan 2018

Attendees

- Raghul Manohara n
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• UAT-1 Approval • Sprint 6 UI - 25% • Sprint 6 User stories - 50%
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 6 UI • Sprint 6 User stories
3 min	What was done last week - HTC	Muthukumar G	• Sprint 5 Web, Mobile, SF and Services Development • UAT - Milestone 1 Sign-off
2 min	What's the plan for this week - HTC	Muthukumar G	• Sprint 5 Web, Mobile, SF and Services Delivery • Test Cases and Procedures for Sprint 5 • Planning, DB and UI discussions for Sprint 7 to 9 • Medispan and DB Design till Sprint 6 - implementation planning based on received content from Julio and Raghul

Action items

- [x] Raghul Manoharan: CMS for MatchRX - Further Actions Plan
- [ ] Muthukumar G: Zeamster - API Integration plan

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 5 - Week 3 Review

Date

06 Feb 2018

Attendees

- Raghul Manohara
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	Sprint 6 User Story - 90% Sprint 6 UI - 70%
2 min	What's the plan for this week - MRX	Raghul Manoharan	Sprint 6 & 7 User stories Sprint 6 UI
3 min	What was done last week - HTC	Muthukumar G	• Sprint 5 Web, Mobile, SF and Services Delivery • Test Cases and Procedures for Sprint 5 • Planning, DB and UI discussions for Sprint 7 to 9 • Medispan and DB Design till Sprint 6 - implementation planning based on received content from Julio and Raghul

2 min	What's the plan for this week - HTC	Muthukumar G	• Planning, DB and UI discussions for Sprint 7 to 9 • Medispan in Sprint 6 - implementation planning based on received content from Julio and Raghul • NDC# Validate based on Source Code provided by Julio • QA for Sprint 5 WBS • Issue Fixing on APIs and UI - Sprint 5
5 mins	UAT - 2 Plan	Raghul Manoharan	The below paln was discussed and agreed by all the meeting participants • Sprint 7 - Week 1 - MatchRX to perform UAT and document bugs • Sprint 7 - Week 2 - HTC to fix the reported bugs • Sprint 7 - Week 3 - MRX to retest the fixes and HTC to fix the re-opened bugs.

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 6 - Week 1 Review

Date

13 Feb 2018

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 6 user stories - 100% • Sprint 6 UI
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 7 User stories • Sprint 7 UI
3 min	What was done last week - HTC	Muthukumar G	• QA for Sprint 5 and Issue Fixing • NDC# Validate analysis • DB and Planning - Sprint 7 to 9 • Username approach based on the rules of VM and MRX • Issue fixes on Mobile and SF Web-Services
2 min	What's the plan for this week - HTC	Muthukumar G	• Updates on DB Design - Sprint 7 to 9 • Analysis and Dev.Start [Web-Services and UI Programming] - Sprint 6 • MediSpan Implementation Plan - Sprint 6

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 6 - Week 2 Review

Date

20 Feb 2018

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 7 User Stories - 30% • Sprint 7 UI - 25%
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 7 user stories • Sprint 7 UI • CMS • MMS
3 min	What was done last week - HTC	Muthukumar G	• Analysis and Dev.Start [Web-Services and UI Programming] - Sprint 6 • MediSpan Implementation Plan - Sprint 6
2 min	What's the plan for this week - HTC	Muthukumar G	• Updates on DB Design - Sprint 7 to 9 • Medispan Implementation plan review along with new structure • MMS discussion for implementation strategy • Development of Web-Services and UI, Delivery of dependency web-services for SF and Mobile (Wishlist, Cart and Order Lifecycle) • UAT 2 preparations

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 6 - Week 3 Review

Date

27 Feb 2018

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 7 User Stories - 80% • Sprint 7 UI - 75%
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 7 & 8 user stories • Sprint 7 UI • CMS
3 min	What was done last week - HTC	Muthukumar G	• Development of Web-Services and UI, Delivery of dependency web-services for SF and Mobile (Wishlist, Cart and Order Lifecycle) • UAT 2 preparations • Updates on DB Design - Sprint 7 to 9 • Medispan Implementation plan review along with new structure • MMS discussion for implementation strategy
2 min	What's the plan for this week - HTC	Muthukumar G	• Updates on DB Design - Sprint 7 to 9 • UAT 2 preparations • QA and Fixes for Sprint 6 • CMS implementation process initiation

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 7 - Week 1 Review

Date

06 Mar 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

YELLOW

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 7 User Stories - 100% • Sprint 7 UI - 90%
2 min	What's the plan for this week - MRX	Raghul Manoharan	• UAT • Sprint 8 UI • CMS
3 min	What was done last week - HTC	Raghul Manoharan	• Completed Sprint 6 WBS and moved to staging
2 min	What's the plan for this week - HTC	Raghul Manoharan	• Sprint 7 webservice • UAT Bug fixes

Action items

- [x] Raghul Manoharan: Share updates on Change Request and place them in Confluence.

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to
1	VM Business Process & Rules	Mike to discuss internally and provide an update on Wednesday	Mike Galloway

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 7 - Week 2 Review

Date

13 Mar 2018

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• UAT • Sprint 8 UI - 20% • CMS
2 min	What's the plan for this week - MRX	Raghul Manoharan	• UAT • Sprint 8 UI • Sprint 8 User story
3 min	What was done last week - HTC	Muthukumar G	• Analysis and Development started for Sprint 7 WBS items • Web Services and UI screens development started for Sprint 7 WBS items
2 min	What's the plan for this week - HTC	Muthukumar G	• UAT issues to closure • Web-Services and AngularJS, Mobile, SF scope delivery to QA • Integration of PHP and Salesforce scope
3 min	Risk # 1 in Sprint 7 Week 1 meeting - VM Business Process & Rules	Raghul Manoharan	• It was decided that HTC and MRX will proceed with the current scope. • New features will be processed as change requested.

Action items

- [x] Raghul Manoharan: DB Design Confirmation for Sprint 7 requirements
- [x] Raghul Manoharan: MMS Approach confirmation from Nowfal
- [ ] Julio Marchi: Revised Medispan data structure (Including shape etc.)

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to
1	VM Business Process & Rules	Risk closed.	

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 7 - Week 3 Review

Date

20 Mar 2018

Attendees

- Raghul Manoharan
- Muthukumar G
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• UAT • Sprint 8 UI - 50% • Received MMS related information from Nowfal
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 8 UI • Sprint 9 User story
3 min	What was done last week - HTC	Muthukumar G	• UAT issues to closure - 60% completed • Web-Services and AngularJS, Mobile, SF scope delivery to QA • Integration of PHP and Salesforce scope
2 min	What's the plan for this week - HTC	Muthukumar G	• UAT issues to closure • Sprint 7 issue fixing
5 min	UAT Feedback & Plan		• Around 180 defects logged by MRX. HTC classified 100 as defect, 40 as duplicates and new/change in requirements and 40 requires more clarification or data to reproduce the defect. • HTC would like to ensure complete satification before MRX signs off on the UAT.

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 8 - Week 1 Review

Date

27 Mar 2018

Attendees

- Raghul Manoharan
- Muthukumar G
- Ramprakash vc
- Bharath Devanathan
- Mike Galloway
- Karen Pegg
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 8 UI - 100% • Sprint 8 user stories - 100% • Financial transaction table confirmation with Nowfal
2 min	What's the plan for this week - MRX	Raghul Manoharan	• UAT round 2 • Sprint 9 User story • Sprint 9 UI • CMS discussion
3 min	What was done last week - HTC	Ramprakash	• UAT issues to closure • Sprint 7 issue fixing
2 min	What's the plan for this week - HTC	Ramprakash	• UAT Issue fixing Support • Sprint 8 Dev-start and web-services, UI design

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 8 - Week 2 Review

Date

03 Apr 2018

Attendees

- Raghul Manoharan
- Muthukumar G
- Ramprakash
- Bharath Devanathan
- Mike Galloway
- Karen Pegg

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes

3 min	What was done last week - MRX	Raghul Manoharan	• UAT round 2 • Sprint 9 User story • Sprint 9 UI
2 min	What's the plan for this week - MRX	Raghul Manoharan	• UAT round 2 • Sprint 9 User story • Sprint 9 UI • Financial transaction table confirmation with Nowfal • CMS discussion
3 min	What was done last week - HTC	Ramprakash	• UAT Issue fixing Support • Sprint 8 Dev-start and web-services, UI design
2 min	What's the plan for this week - HTC	Ramprakash	• UAT issues to closure • Web-Services and AngularJS, Mobile, SF scope delivery to QA • Integration of PHP and Salesforce scope
5 min	Data Migration	Raghul Manoharan	• HTC recommends MatchRX to start planning for data migration.

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 8 - Week 3 Review

Date

10 Apr 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Bharath Devanathan
- Julio Marchi
- Mike Galloway

- Karen Pegg

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• UAT round 2 • Sprint 9 User story • Sprint 9 UI • Financial transaction table confirmation with Nowfal • CMS discussion
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 9 User story • Sprint 9 UI • CMS
3 min	What was done last week - HTC	Ramprakash	• UAT issues to closure • Web-Services and AngularJS, Mobile, SF scope delivery to QA • Integration of PHP and Salesforce scope
2 min	What's the plan for this week - HTC	Ramprakash	• UAT issues to closure • Sprint 8 Testing and issue fixing

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 9 - Week 1 Review

Date

18 Apr 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Bharath Devanathan
- Julio Marchi
- Mike Galloway
- Karen Pegg

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• UAT round 3 • Sprint 9 User story • Sprint 9 UI • CMS discussion • Shippo discussion.
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 10 User story • Sprint 9 & 10 UI • UAT Round 3 • CMS discussion • Salesforce UI walkthrough • Zeamster
3 min	What was done last week - HTC	Ramprakash	• UAT issues to closure • Sprint 8 Testing and issue fixing
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 9 Development start • Identifying the dependencies between Web and SF teams
2 min	Issue #1 - Angular implementation	Raghul Manoharan	• Meeting scheduled between MatchRX and HTC steering committee for Friday, April 20.

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to
1	Angular implementation		

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 9 - Week 2 Review

Date

24 Apr 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Bharath Devanathan
- Mike Galloway
- Karen Pegg

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• UAT round 3 • Sprint 10 User story • Sprint 9 & 10 UI • Zeamster discussion • Salesforce UI walkthrough • Angular implementation steering committee meeting
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 10 User story • Sprint 10 UI • CMS sitemap, content & frame finalization
3 min	What was done last week - HTC	Ramprakash	• Sprint 9 Development started • Delivering the Web services required for Mobile and Sales force teams.
2 min	What's the plan for this week - HTC	Ramprakash	• Delivering the PHP, Mobile & Salesforce teams scope to the QA server

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to
1	Angular implementation	HTC has provided options with impact analysis to MatchRX.	Raghul Manoharan

Risks

#	Description	Mitigation plan	Assigned to
1	Angular implementation issue may affect the milestone 3 delivery		

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 9 - Week 3 Review

Date

03 May 2018

Attendees

- Raghul Manoharan
- Ramen
- Mike Galloway
- Karen Pegg

Goals

- Sync MRX and HTC teams

Project Status*

RED

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 10 User story • Sprint 10 UI
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 10 User story • Sprint 10 UI
3 min	What was done last week - HTC	Ramprakash Ramen	• Salesforce integration with PHP code as per Sprint 9 scope • Multiple discussions on UI technology changes • Mobile development is completed with last weeks work • Testing of some of the functionalities related to Salesforce and Mobile app. • Zeamster integration was in progress but currently on hold to see if any other alternative technologies more viable as suggested by MatchRX.
2 min	What's the plan for this week - HTC	Ramprakash Ramen	• Planning and discussions around UI technology changes • DB design and reviews (internal) for Sprint 9

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to
1	Angular implementation	• HTC has provided 2 options with impact analysis to MatchRX. • MatchRX has suggested a 3rd option. • HTC to provide the estimate for 3rd option	Raghul Manoharan
2	Milestone 3 delivery has been affected due to Issue #1 - Angular implementation	• Faster resolution on Angular implementation issues mentioned above	

Risks

#	Description	Mitigation plan	Assigned to
1	VM order workflow yet to be finalized. As many WBS assigned to sprint 10 has dependency on VM order workflow, this could affect sprint 10 story points (amount of work available)		

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 10 - Week 1 Review

Date

08 May 2018

Attendees

- Raghul Manoharan
- Karen Pegg
- Bharath
- Julio Marchi
- Ramprakash

Goals

- Sync MRX and HTC teams

Project Status*

RED

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 10 User story • Sprint 10 UI • Steering committee meeting to discuss UI options
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 11 User story • Sprint 11 UI • Wordpress discussion
3 min	What was done last week - HTC	Ramprakash	• Mobile, SF scope has been deployed on QA • Sprint 9 Testing has been completed
2 min	What's the plan for this week - HTC	Ramprakash	• Analyzing Sprint 10 User Stories • Sprint 10 development start • Identifying the dependencies between Web and SF teams

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to
1	Angular implementation	• HTC has provided the estimate • Meeting scheduled between Julio, Ramen and Bharath to finalize the scope • HTC to provided revised estimate based on the finalized scope	Bharath
2	Milestone 3 delivery has been affected due to Issue #1 - Angular implementation	• Faster resolution on Angular implementation issues mentioned above	

Risks

#	Description	Mitigation plan	Assigned to

1	Last week's Risk. VM order workflow yet to be finalized. As many WBS assigned to sprint 10 has dependency on VM order workflow, this could affect sprint 10 story points (amount of work available)	VM Order workflow finalized. Risk Closed	

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 10 - Week 2 Review

Date

15 May 2018

Attendees

- Raghul Manoharan
- Karen Pegg
- Bharath
- Julio Marchi
- Ramprakash

Goals

- Sync MRX and HTC teams

Project Status*

YELLOW

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 11 User story • Sprint 11 UI • UI Change Request approved • Tech discussion between Julio and Ramen
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 11 User story • Sprint 11 UI • Wordpress discussion
3 min	What was done last week - HTC	Ramprakash	• Sprint 10 development start • Identifying the dependencies between Web and SF teams
2 min	What's the plan for this week - HTC	Ramprakash	• Delivering SF, Mobile Scope to QA • Analyzing the Sprint Zero activities for Laravel - Blade implementation

Action items

- [x] Raghul Manoharan : To provide checklist of technical items and requirement tractability matrix to be approved for Milestone 2.

Issues

#	Description	Mitigation plan	Assigned to
1	Angular implementation	• C008 approved by MatchRX and HTC	Closed
2	Milestone 3 delivery has been affected due to Issue #1 - Angular implementation	• Schedule to be re-baselined	Ramprakash

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 10 - Week 3 Review

Date

22 May 2018

Attendees

- Raghul Manoharan
- Karen Pegg
- Bharath
- Julio Marchi
- Ramprakash
- Mike Galloway
- Ramen

Goals

- Sync MRX and HTC teams

Project Status*

YELLOW

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 11 User story • Sprint 11 UI
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Sprint 11 & 12 User story • Sprint 11 UI • Wordpress discussion
3 min	What was done last week - HTC	Ramprakash	• Delivering SF, Mobile Scope to QA • Analyzing the Sprint Zero activities for Laravel - Blade implementation
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 10 Testing and issue fixing • As a part of Sprint zero activity, Team is working on folder structure rearrangement and Laravel - Blade framework setup

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to
1	Milestone 3 delivery has been affected due to Issue #1 - Angular implementation	• Schedule to be re-baselined	Ramprakash

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 11 - Week 1 Review - Cancelled

Date

29 May 2018

Meeting Canceled.

Sprint 11 - Week 2 Review

Date

05 Jun 2018

Attendees

- Raghul Manoharan
- Karen Pegg
- Julio Marchi
- Ramprakash
- Ramen

Goals

- Sync MRX and HTC teams

Project Status*

RED

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 12 UI • Salesforce DB discussion
2 min	What's the plan for this week - MRX	Raghul Manoharan	• WordPress discussion - Deadline • Salesforce requirement walkthrough
3 min	What was done last week - HTC	Ramprakash	• Sprint 11 development started • Sprint zero activities have been completed for new UI development • Tech stack for the UI change has been reviewed and approved by Julio
2 min	What's the plan for this week - HTC	Ramprakash	• Delivering the PHP, Mobile teams scope to the QA server • Sprint 1 - started for new UI development • Clarification and resolution on MMS, Zeamster and Push Notification related requirements

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to
1	Milestone 3 delivery has been affected due to UI Change Request C008	• Schedule to be re-baselined	Ramprakash

2	In Sprint 10 Week 3 (week of May 21), MatchRX expressed concerns with the use of two DBs (MRX and SF) and requested POCs for two options. HTC and MatchRX agreed that HTC will provide the findings of the POCs and based on the option selected by MatchRX, HTC will estimate and provide the cost for the selected option. Due to pending Salesforce DB decision, the following has been put on hold • Sprint 11 & 12 Salesforce related WBS • Salesforce integration with DataQ • Marketing email (icontact) integration with Salesforce • Chat feature as it has a dependency on the back-office platform (compatibility) • IP phone change request as it has a dependency on the back-office platform (compatibility) • FedEX schedule pick up Change request C006. The above has started to have an impact on the project schedule and cost. Any further delay from the agreed date for finalizing the DB decision will have a cost impact for MatchRX	• HTC provided the impact analysis on May 31. • HTC provided a Salesforce walkthrough on June 1 • MatchRX to evaluate the impact analysis document and state if there are any disagreements. • MatchRX to select one of the provided options for one DB or decide to continue with the current approach of two DBs. • MatchRX will make the decision on or before June 13, 2018.	Julio Marchi
3	Milestone 2 yet to be signed off because of the above issue #2	Faster resolution of issue #2	

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 11 - Week 3 Review

Date

12 Jun 2018

Attendees

- Raghul Manoharan
- Karen Pegg
- Ramprakash
- Ramen
- Mike Galloway
- Bharath

Goals

- Sync MRX and HTC teams

Project Status*

RED

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Salesforce DB discussion
2 min	What's the plan for this week - MRX	Raghul Manoharan	• WordPress discussion • Salesforce DB Resolution
3 min	What was done last week - HTC	Ramprakash	• Delivering PHP, Mobile teams scope to QA server • Sprint 1 - started for new UI development (Two Weeks Sprint)
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 11 testing & issues fixing • Sprint 1 UI development, Testing & issue fixing • Pending Clarification from Nowfal on MMS • Match Money code Walkthrough by Julio • My posting - Inline editing requirement discussion

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to
1	Milestone 3 delivery has been affected due to UI Change Request C008 & issue #2	• Schedule to be re-baselined	

2	In Sprint 10 Week 3 (week of May 21), MatchRX expressed concerns with the use of two DBs (MRX and SF) and requested POCs for two options. HTC and MatchRX agreed that HTC will provide the findings of the POCs and based on the option selected by MatchRX, HTC will estimate and provide the cost for the selected option. Due to pending Salesforce DB decision, the following has been put on hold • Sprint 11 & 12 Salesforce related WBS • Salesforce integration with DataQ • Marketing email (icontact) integration with Salesforce • Chat feature as it has a dependency on the back-office platform (compatibility) • IP phone change request as it has a dependency on the back-office platform (compatibility) • FedEX schedule pick up Change request C006. The above has started to have an impact on the project schedule and cost. Any further delay from the agreed date for finalizing the DB decision will have a cost impact for MatchRX. **Update June 12:** During the previous week, MatchRX requested answers to few more scenarios such as clearing SF DB, reloading with MySQL DB data and updating SF DB. HTC provided the answers.	• HTC provided the impact analysis on May 31. • HTC provided a Salesforce walkthrough on June 1 • MatchRX to evaluate the impact analysis document and state if there are any disagreements. • MatchRX to select one of the provided options for one DB or decide to continue with the current approach of two DBs. • MatchRX will make the decision on or before June 13, 2018.	
3	Milestone 2 yet to be signed off because of the above issue #2	Faster resolution of issue #2	
4	Pending Clarification from Nowfal on MMS		

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 12 - Week 1 Review

Date

19 Jun 2018

Attendees

- Raghul Manoharan
- Karen Pegg
- Ramprakash
- Ramen
- Mike Galloway
- Bharath
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

YELLOW

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 12 UI and User story
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Change Request • Any outstanding items such as MMS.
3 min	What was done last week - HTC	Ramprakash	• Due to SF DB impact Sprint 11 has been partially completed • Sprint 1- Development has been completed for new UI development
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 12 has been started • Sprint 2 has been started for new UI development

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to
1	Milestone 3 delivery has been affected due to UI Change Request C008 & issue #2	• Schedule to be re-baselined	

<table>
<tr><td>2</td><td>In Sprint 10 Week 3 (week of May 21), MatchRX expressed concerns with the use of two DBs (MRX and SF) and requested POCs for two options. HTC and MatchRX agreed that HTC will provide the findings of the POCs and based on the option selected by MatchRX, HTC will estimate and provide the cost for the selected option.

Due to pending Salesforce DB decision, the following has been put on hold
Sprint 11 & 12 Salesforce related WBS
Salesforce integration with DataQ
Marketing email (icontact) integration with Salesforce
Chat feature as it has a dependency on the back-office platform (compatibility)
IP phone change request as it has a dependency on the back-office platform (compatibility)
FedEX schedule pick up Change request C006.
The above has started to have an impact on the project schedule and cost. Any further delay from the agreed date for finalizing the DB decision will have a cost impact for MatchRX.

Update June 12:

During the previous week, MatchRX requested answers to few more scenarios such as clearing SF DB, reloading with MySQL DB data and updating SF DB.

HTC provided the answers.

Update June 19:

MatchRX communicated their decision that HTC can proceed with the current approach of two DBs.</td><td>HTC provided the impact analysis on May 31.
HTC provided a Salesforce walkthrough on June 1
MatchRX to evaluate the impact analysis document and state if there are any disagreements.
MatchRX to select one of the provided options for one DB or decide to continue with the current approach of two DBs.
MatchRX will make the decision on or before June 13, 2018.
MatchRX made the decision to continue with the current approach of two DB on June 13, 2018.
MatchRX requested to convene the steering committee for a meeting</td><td></td></tr>
<tr><td>3</td><td>Milestone 2 yet to be signed off because of the above issue #2</td><td>Faster resolution of issue #2</td><td></td></tr>
<tr><td></td><td></td><td></td><td></td></tr>
</table>

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 12 - Week 2 Review

Date

26 Jun 2018

Attendees

- Raghul Manoharan
- Karen Pegg
- Ramprakash
- Ramen
- Mike Galloway
- Bharath
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Sprint 13 User story • Change Request documentation and estimation • MMS discussion with Nowfal
2 min	What's the plan for this week - MRX	Raghul Manoharan	• MMS tech approach finalization • Change request documentation & processing • Steering committee meeting • New UI walkthrough
3 min	What was done last week - HTC	Ramprakash	• Sprint 12 development started • Sprint 2 development started for new UI
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 12 - Delivering the PHP, Salesforce teams scope to QA server • Sprint 2 - Delivering Sprint 2 scope for new UI development • Julio has to share the match money source code to offshore team by June 29

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

1	Milestone 3 delivery has been affected due to UI Change Request C008 & issue #2 **Update June 26** Schedule attached for everyone's review and confirmation. MatchRx_Release Roadmap _ V2_meeting minutes.xlsx **UAT Sprint 5 & 9 plan** 1. HTC will have the code in the staging environment by Mon day 9:00 AM EST (Start of week 1) 2. MatchRX is expected to log all the bugs (functional and technical) as two batches on 7th day (following Sunday) and 14th day (Sunday) 10:00 PM EST (End of week 2) 3. HTC will fix the bugs and have the fixed code in the staging environment by next Monday 9:00 AM EST (Start of week 4) 4. MatchRX is expected to retest and log the bugs by Tuesd ay 10:00 PM EST (week 4) 5. HTC is expected to fix the bugs and move the code to the staging environment by Friday 9:00 AM EST (week 4) 6. If Steps 1 to 5 go as per the plan, MatchRX is expected to provide sign off (functional and technical) by Friday 6:00 PM EST (week 4) 7. At the end of week 2, MatchRX and HTC will discuss the status of UAT and decide if we need to extend the UAT by 1 week.	• Schedule to be re-baselined • Draft plan reviewed with Mike on June 20.	
2	In Sprint 10 Week 3 (week of May 21), MatchRX expressed concerns with the use of two DBs (MRX and SF) and requested POCs for two options. HTC and MatchRX agreed that HTC will provide the findings of the POCs and based on the option selected by MatchRX, HTC will estimate and provide the cost for the selected option. Due to pending Salesforce DB decision, the following has been put on hold • Sprint 11 & 12 Salesforce related WBS • Salesforce integration with DataQ • Marketing email (icontact) integration with Salesforce • Chat feature as it has a dependency on the back-office platform (compatibility) • IP phone change request as it has a dependency on the back-office platform (compatibility) • FedEX schedule pick up Change request C006. The above has started to have an impact on the project schedule and cost. Any further delay from the agreed date for finalizing the DB decision will have a cost impact for MatchRX. **Update June 12:** During the previous week, MatchRX requested answers to few more scenarios such as clearing SF DB, reloading with MySQL DB data and updating SF DB. HTC provided the answers. **Update June 19:** MatchRX communicated their decision that HTC can proceed with the current approach of two DBs. **Update June 26:** Steering committee meeting scheduled for Wednesday, June 27.	• HTC provided the impact analysis on May 31. • HTC provided a Salesforce walkthrough on June 1 • MatchRX to evaluate the impact analysis document and state if there are any disagreements. • MatchRX to select one of the provided options for one DB or decide to continue with the current approach of two DBs. • MatchRX will make the decision on or before June 13, 2018. • MatchRX made the decision to continue with the current approach of two DB on June 13, 2018. • MatchRX requested to convene the steering committee for a meeting	
3	Milestone 2 yet to be signed off because of the above issue #2	Faster resolution of issue #2	

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 12 - Week 3 Review

Date

03 Jul 2018

Attendees

- Raghul Manoharan
- Karen Pegg
- Ramprakash
- Ramen
- Bharath
- Julio Marchi

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Change Request documentation and estimation • Steering committee meeting • New UI walkthrough
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Change request documentation & processing • Wordpress
3 min	What was done last week - HTC	Ramprakash	• Sprint 12 - Delivered PHP, Salesforce teams scope to QA server • Sprint 2 - Delivered Sprint 2 scope for new UI development • Julio has shared the match money source code to offshore team
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 12 - Testing & issues fixing • Sprint 2 - Testing & issues fixing • Team will review the match money code and get the clarification from Julio

Action items

- [ ]

Issues

<table>
<tr><th>#</th><th>Description</th><th>Mitigation plan</th><th>Assigned to</th></tr>
<tr><td>1</td><td>Milestone 3 delivery has been affected due to UI Change Request C008 & issue #2

Update June 26

Schedule attached for everyone's review and confirmation.

MatchRx_Release Roadmap _ V2_meeting minutes.xlsx

UAT Sprint 5 & 9 plan
HTC will have the code in the staging environment by Mon day 9:00 AM EST (Start of week 1)
MatchRX is expected to log all the bugs (functional and technical) as two batches on 7th day (following Sunday) and 14th day (Sunday) 10:00 PM EST (End of week 2)
HTC will fix the bugs and have the fixed code in the staging environment by next Monday 9:00 AM EST (Start of week 4)
MatchRX is expected to retest and log the bugs by Tuesd ay 10:00 PM EST (week 4)
HTC is expected to fix the bugs and move the code to the staging environment by Friday 9:00 AM EST (week 4)
If Steps 1 to 5 go as per the plan, MatchRX is expected to provide sign off (functional and technical) by Friday 6:00 PM EST (week 4)
At the end of week 2, MatchRX and HTC will discuss the status of UAT and decide if we need to extend the UAT by 1 week.
Update July 3:

MatchRX to provide approval by this week.</td><td>Schedule to be re-baselined
Draft plan reviewed with Mike on June 20.</td><td></td></tr>
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2	In Sprint 10 Week 3 (week of May 21), MatchRX expressed concerns with the use of two DBs (MRX and SF) and requested POCs for two options. HTC and MatchRX agreed that HTC will provide the findings of the POCs and based on the option selected by MatchRX, HTC will estimate and provide the cost for the selected option. Due to pending Salesforce DB decision, the following has been put on hold • Sprint 11 & 12 Salesforce related WBS • Salesforce integration with DataQ • Marketing email (icontact) integration with Salesforce • Chat feature as it has a dependency on the back-office platform (compatibility) • IP phone change request as it has a dependency on the back-office platform (compatibility) • FedEX schedule pick up Change request C006. The above has started to have an impact on the project schedule and cost. Any further delay from the agreed date for finalizing the DB decision will have a cost impact for MatchRX. **Update June 12:** During the previous week, MatchRX requested answers to few more scenarios such as clearing SF DB, reloading with MySQL DB data and updating SF DB. HTC provided the answers. **Update June 19:** MatchRX communicated their decision that HTC can proceed with the current approach of two DBs. **Update June 26:** Steering committee meeting scheduled for Wednesday, June 27. **Update July 3:** Steering committee meeting was held. It was decided that MatchRX will communicate the technical and functional requirements and HTC will estimate the effort required based on the requirements.	• HTC provided the impact analysis on May 31. • HTC provided a Salesforce walkthrough on June 1 • MatchRX to evaluate the impact analysis document and state if there are any disagreements. • MatchRX to select one of the provided options for one DB or decide to continue with the current approach of two DBs. • MatchRX will make the decision on or before June 13, 2018. • MatchRX made the decision to continue with the current approach of two DB on June 13, 2018. • MatchRX requested to convene the steering committee for a meeting	
3	Milestone 2 yet to be signed off because of the above issue #2 **Update July 3:** MatchRX has provided the sign-off. HTC should review and provide their comments.		

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 13 - Week 1 Review

Date

12 Jul 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Ramen
- Bharath
- Julio Marchi
- Mike Galloway

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Change Request documentation and estimation • Word Press discussion
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Change request documentation & processing
3 min	What was done last week - HTC	Ramprakash	• Sprint 12 scope has been completed for PHP & SF team • Sprint 3 Started for new UI development • Match Money integration was completed
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 13 - Started analysis & development • Sprint 3 - Testing & Issue fixing in progress

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

<table>
<tr>
<td>1</td>
<td>Milestone 3 delivery has been affected due to UI Change Request C008 & issue #2

Update June 26

Schedule attached for everyone's review and confirmation.

MatchRx_Release Roadmap _ V2_meeting minutes.xlsx

UAT Sprint 5 & 9 plan

1. HTC will have the code in the staging environment by Monday 9:00 AM EST (Start of week 1)
2. MatchRX is expected to log all the bugs (functional and technical) as two batches on 7th day (following Sunday) and 14th day (Sunday) 10:00 PM EST (End of week 2)
3. HTC will fix the bugs and have the fixed code in the staging environment by next Monday 9:00 AM EST (Start of week 4)
4. MatchRX is expected to retest and log the bugs by Tuesday 10:00 PM EST (week 4)
5. HTC is expected to fix the bugs and move the code to the staging environment by Friday 9:00 AM EST (week 4)
6. If Steps 1 to 5 go as per the plan, MatchRX is expected to provide sign off (functional and technical) by Friday 6:00 PM EST (week 4)
7. At the end of week 2, MatchRX and HTC will discuss the status of UAT and decide if we need to extend the UAT by 1 week.

Update July 3:

MatchRX to provide approval by this week.

Update July 12:

Milestone 3 dates have been finalized. UAT will start on July 30 and follow the above-mentioned plan. This issue is closed.

Milestone 4 dates & warranty period start date need more discussion. a new issue is opened to track the same.</td>
<td>• Schedule to be re-baselined
• Draft plan reviewed with Mike on June 20.
• Milestone 3 dates finalized. New Issue opened for milestone 4 dates.
• Issue closed.</td>
<td></td>
</tr>
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4	MatchRX would like to get clarity on the start date of the warranty period as • The requirements mentioned in Change Requests may not be developed, tested and signed off by MatchRX by Oct 19, 2018. • MatchRX may not be production ready immediately after sign off and hence would like to know from HTC if it is possible to postpone the start date of the warranty period.		

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 13 - Week 2 Review

Date

17 Jul 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Ramen
- Bharath
- Julio Marchi
- Mike Galloway
- Karen Pegg

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Change Request documentation and estimation

2 min	What's the plan for this week - MRX	Raghul Manoharan	• Change request documentation & processing • Word Press • Test Scenarios for UAT
3 min	What was done last week - HTC	Ramprakash	• Sprint 13 - Started analysis & development for PHP & SF team • Sprint 3 - Testing & Issue fixing completed
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 13 - Moving PHP & SF scope to QA • Sprint 4 development started for new UI • MMS approach has to be verified and confirmed ASAP

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

1	In Sprint 10 Week 3 (week of May 21), MatchRX expressed concerns with the use of two DBs (MRX and SF) and requested POCs for two options. HTC and MatchRX agreed that HTC will provide the findings of the POCs and based on the option selected by MatchRX, HTC will estimate and provide the cost for the selected option. Due to pending Salesforce DB decision, the following has been put on hold • Sprint 11 & 12 Salesforce related WBS • Salesforce integration with DataQ • Marketing email (icontact) integration with Salesforce • Chat feature as it has a dependency on the back-office platform (compatibility) • IP phone change request as it has a dependency on the back-office platform (compatibility) • FedEX schedule pick up Change request C006. The above has started to have an impact on the project schedule and cost. Any further delay from the agreed date for finalizing the DB decision will have a cost impact for MatchRX. **Update June 12:** During the previous week, MatchRX requested answers to few more scenarios such as clearing SF DB, reloading with MySQL DB data and updating SF DB. HTC provided the answers. **Update June 19:** MatchRX communicated their decision that HTC can proceed with the current approach of two DBs. **Update June 26:** Steering committee meeting scheduled for Wednesday, June 27. **Update July 3:** Steering committee meeting was held. It was decided that MatchRX will communicate the technical and functional requirements and HTC will estimate the effort required based on the requirements. **Update July 12:** SF team provided an overview of various ways in which data could be updated, upserted or loaded in SF DB. MatchRX communicated that they are comfortable with the options. MatchRX and HTC decided to continue to store the data for the majority of the tables (Prospects, Members, Contacts, Postings, Orders, Financial Transactions) in SF DB. MatchRX has requested to make the following change: • Tasks and cases connected to Postings, Orders, and Financial transactions should be now connected to Members and Contacts. HTC will estimate the effort required and communicate to MatchRX **Update July 17:** MatchRX has communicated their expectation on error handling when a transaction, inititated on Salesforce, fails to save in MySQL DB. HTC has to respond with the possible solutions.	• HTC provided the impact analysis on May 31. • HTC provided a Salesforce walkthrough on June 1 • MatchRX to evaluate the impact analysis document and state if there are any disagreements. • MatchRX to select one of the provided options for one DB or decide to continue with the current approach of two DBs. • MatchRX will make the decision on or before June 13, 2018. • MatchRX made the decision to continue with the current approach of two DB on June 13, 2018. • MatchRX requested to convene the steering committee for a meeting	

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Risks

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*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 13 - Week 3 Review

Date

24 Jul 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Ramen
- Bharath
- Julio Marchi
- Mike Galloway
- Karen Pegg

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Change Request documentation and estimation • Word Press
2 min	What's the plan for this week - MRX	Raghul Manoharan	• Change request documentation & processing • Word Press • Preparation for UAT
3 min	What was done last week - HTC	Ramprakash	• Sprint 13 - Delivered PHP, Salesforce teams scope to QA server • Sprint 4 - Delivered Sprint 4 scope to QA server (new UI development)
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 13 - Testing & issues fixing • Sprint 4 - Testing & issues fixing • UAT infra setup & Test data preparation

Action items

- [ ]

Issues

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Risks

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RED – Project not on track and need a plan to bring it back on track

Sprint 14 - Week 1 Review

Date

31 Jul 2018

Attendees

- Raghul Manoharan
- Ramprakash\
- Ramen
- Bharath
- Julio Marchi
- Mike Galloway

- Karen Pegg

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Change Request documentation and estimation • Word Press
2 min	What's the plan for this week - MRX	Raghul Manoharan	• UAT • Word Press
3 min	What was done last week - HTC	Ramprakash	• Completed Sprint 13 and Sprint 4 development and testing activity
2 min	What's the plan for this week - HTC	Ramprakash	• VM related UI in Sprint 5

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

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Risks

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Sprint 14 - Week 2 Review

Date

07 Aug 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Bharath
- Mike Galloway
- Ramen

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Change Request documentation and estimation • UAT
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3 min	What was done last week - HTC	Ramprakash	• Sprint 14 - Started analysis & development • Sprint 5 Started for new UI development
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 14 - Testing & Issue fixing • Sprint 5 - Testing & Issue fixing in progress

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

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Risks

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*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 14 - Week 3 Review

Date

14 Aug 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Bharath
- Julio
- Karen

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Change Request UI • UAT
2 min	What's the plan for this week - MRX	Raghul Manoharan	• UAT • Word Press Review
3 min	What was done last week - HTC	Ramprakash	• Sprint 14 - Delivered PHP, Salesforce teams scope to QA server • Sprint 5 - Testing & Issue fixing
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 14 - Testing & Issue fixing • Sprint 6 - Development started for new UI
2 min	Final list of CR for Milestone 4	Raghul Manoharan	• Finalize the list of Change Requests by Friday, Aug 17 • HTC will plan and communicate the backlog for Milestone 4
	Data migration	Raghul Manoharan	• Julio mentioned that DataQ will be ready next week. • Medispan will be migrated after Julio completes DataQ

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

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<tr><td>1</td><td>
In Sprint 10 Week 3 (week of May 21), MatchRX expressed concerns with the use of two DBs (MRX and SF) and requested POCs for two options. HTC and MatchRX agreed that HTC will provide the findings of the POCs and based on the option selected by MatchRX, HTC will estimate and provide the cost for the selected option.
Due to pending Salesforce DB decision, the following has been put on hold

Sprint 11 & 12 Salesforce related WBS
Salesforce integration with DataQ
Marketing email (icontact) integration with Salesforce
Chat feature as it has a dependency on the back-office platform (compatibility)
IP phone change request as it has a dependency on the back-office platform (compatibility)
FedEX schedule pick up Change request C006.

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During the previous week, MatchRX requested answers to few more scenarios such as clearing SF DB, reloading with MySQL DB data and updating SF DB.
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Update June 26:
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SF team provided an overview of various ways in which data could be updated, upserted or loaded in SF DB. MatchRX communicated that they are comfortable with the options. MatchRX and HTC decided to continue to store the data for the majority of the tables (Prospects, Members, Contacts, Postings, Orders, Financial Transactions) in SF DB. MatchRX has requested to make the following change:

Tasks and cases connected to Postings, Orders, and Financial transactions should be now connected to Members and Contacts.

HTC will estimate the effort required and communicate to MatchRX
Update July 17:
MatchRX has communicated their expectation on error handling when a transaction, initiated on Salesforce, fails to save in MySQL DB.
HTC has to respond with the possible solutions.
Update July 23:
No new updates
Update Aug 14:
HTC explained error handling using SF custom Admin console. MatchRX is happy with the proposed solution. MatchRX has requested for an additional feature which HTC is exploring.
</td><td>

HTC provided the impact analysis on May 31.
HTC provided a Salesforce walkthrough on June 1
MatchRX to evaluate the impact analysis document and state if there are any disagreements.
MatchRX to select one of the provided options for one DB or decide to continue with the current approach of two DBs.
MatchRX will make the decision on or before June 13, 2018.
MatchRX made the decision to continue with the current approach of two DB on June 13, 2018.
MatchRX requested to convene the steering committee for a meeting

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Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 15 - Week 1 Review

Date

21 Aug 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Bharath
- Julio
- Karen
- Ramen

- Mike

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• Change Request UI • UAT
2 min	What's the plan for this week - MRX	Raghul Manoharan	• UAT • Word Press Review
3 min	What was done last week - HTC	Ramprakash	• Sprint 14 - scope has been completed for PHP & SF team • Sprint 6 - Development started for new UI • UAT issue fixing
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 15 - Development started for PHP & SF team • Sprint 6 - Testing & Issue fixing • UAT issue fixing
2 min	Final list of CR for Milestone 4	Raghul Manoharan	• Finalize the list of Change Requests by Friday • HTC will plan and communicate the backlog for Milestone 4
	Data migration	Raghul Manoharan	• Julio mentioned that DataQ will be ready next week. (Aug 29) • Medispan will be migrated after Julio completes DataQ
	MMS	Raghul Manoharan	• Raghul to follow up with Nowfal

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

1	In Sprint 10 Week 3 (week of May 21), MatchRX expressed concerns with the use of two DBs (MRX and SF) and requested POCs for two options. HTC and MatchRX agreed that HTC will provide the findings of the POCs and based on the option selected by MatchRX, HTC will estimate and provide the cost for the selected option. Due to pending Salesforce DB decision, the following has been put on hold • Sprint 11 & 12 Salesforce related WBS • Salesforce integration with DataQ • Marketing email (icontact) integration with Salesforce • Chat feature as it has a dependency on the back-office platform (compatibility) • IP phone change request as it has a dependency on the back-office platform (compatibility) • FedEX schedule pick up Change request C006. The above has started to have an impact on the project schedule and cost. Any further delay from the agreed date for finalizing the DB decision will have a cost impact for MatchRX. **Update June 12:** During the previous week, MatchRX requested answers to few more scenarios such as clearing SF DB, reloading with MySQL DB data and updating SF DB. HTC provided the answers. **Update June 19:** MatchRX communicated their decision that HTC can proceed with the current approach of two DBs. **Update June 26:** Steering committee meeting scheduled for Wednesday, June 27. **Update July 3:** Steering committee meeting was held. It was decided that MatchRX will communicate the technical and functional requirements and HTC will estimate the effort required based on the requirements. **Update July 12:** SF team provided an overview of various ways in which data could be updated, upserted or loaded in SF DB. MatchRX communicated that they are comfortable with the options. MatchRX and HTC decided to continue to store the data for the majority of the tables (Prospects, Members, Contacts, Postings, Orders, Financial Transactions) in SF DB. MatchRX has requested to make the following change: • Tasks and cases connected to Postings, Orders, and Financial transactions should be now connected to Members and Contacts. HTC will estimate the effort required and communicate to MatchRX **Update July 17:** MatchRX has communicated their expectation on error handling when a transaction, initiated on Salesforce, fails to save in MySQL DB. HTC has to respond with the possible solutions. **Update July 23:** No new updates **Update Aug 14:** HTC explained error handling using SF custom Admin console. MatchRX is happy with the proposed solution. MatchRX has requested for an additional feature which HTC is exploring.	• HTC provided the impact analysis on May 31. • HTC provided a Salesforce walkthrough on June 1 • MatchRX to evaluate the impact analysis document and state if there are any disagreements. • MatchRX to select one of the provided options for one DB or decide to continue with the current approach of two DBs. • MatchRX will make the decision on or before June 13, 2018. • MatchRX made the decision to continue with the current approach of two DB on June 13, 2018. • MatchRX requested to convene the steering committee for a meeting	

2	Milestone 2 yet to be signed off because of the above issue #2 **Update July 3:** MatchRX has provided the sign-off. HTC should review and provide their comments. **Update July 12:** HTC has suggested a few changes to the exceptions and awaiting MatchRX response. **Update July 17:** MatchRX has revised the exception and HTC is currently reviewing. **Update July 23:** No new updates		
3	MatchRX would like to get clarity on the start date of the warranty period as • The requirements mentioned in Change Requests may not be developed, tested and signed off by MatchRX by Oct 19, 2018. • MatchRX may not be production ready immediately after sign off and hence would like to know from HTC if it is possible to postpone the start date of the warranty period. **Update July 17:** At the end of UAT 3, MatchRX will provide HTC with an approximate go-live date.	To wait for UAT 3 completion	

Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 15 - Week 2 Review

Date

28 Aug 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Julio
- Karen
- Ramen
- Mike

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• UAT Clarification • Word Press Review
2 min	What's the plan for this week - MRX	Raghul Manoharan	• UAT Clarification • Word Press Review • CR Review
3 min	What was done last week - HTC	Ramprakash	• Sprint 15 - Development started for PHP & SF team • Sprint 6 - Testing & Issue fixing • UAT issue fixing
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 15 - Delivering PHP, SF teams scope to QA server • Sprint 7 - Started for UI development team • UAT issue fixing
2 min	Final list of CR for Milestone 4	Raghul Manoharan	• Finalize the list of Change Requests • HTC will plan and communicate the backlog for Milestone 4
2 mins	Data migration	Raghul Manoharan	• Julio mentioned that DataQ will be ready by end of the week. (Aug 31) • Medispan will be migrated after Julio completes DataQ
2 mins	MMS	Raghul Manoharan	• HTC ready to perform integration testing • Awaiting Nowfal's response

Action items

- [ ]

Issues

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Risks

#	Description	Mitigation plan	Assigned to

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 15 - Week 3 Review

Date

04 Sep 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Julio
- Karen
- Ramen
- Mike

- Bharath

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
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2 min	What's the plan for this week - MRX	Raghul Manoharan	• Word Press Review • CR Review
3 min	What was done last week - HTC	Ramprakash	• Sprint 15 - Delivered PHP, Salesforce teams scope to QA server • Sprint 7 - Delivered UI development team scope to QA server • UAT issue fixing
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 15 - Testing & Issue fixing • Sprint 7 - Testing & Issue fixing • UAT issue fixing
2 min	Final list of CR for Milestone 4	Raghul Manoharan	• Finalize the list of Change Requests • HTC will plan and communicate the backlog for Milestone 4
2 mins	Data migration	Raghul Manoharan	• Julio mentioned that DataQ will be ready by Sept 4. • Medispan will be migrated after Julio completes DataQ
2 mins	MMS	Raghul Manoharan	• Awaiting Nowfal's response

Action items

- [ ]

Issues

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Risks

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*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 16 - Week 1 Review

Date

11 Sep 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Julio
- Karen
- Ramen
- Bharath

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• UAT Clarification • Word Press Review • CR Review
2 min	What's the plan for this week - MRX	Raghul Manoharan	• UAT 3 Cycle 2 • Deployment of source code
3 min	What was done last week - HTC	Ramprakash	• Sprint 15 - Testing & Issue fixing • Sprint 7 - Testing & Issue fixing • UAT issue fixing
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 16 - Development started for PHP & SF team • Sprint 8 - Development started for UI team
2 min	Final list of CR for Milestone 4	Raghul Manoharan	• Finalized the list of Change Requests for UAT 4
2 mins	Data migration	Raghul Manoharan	• Julio mentioned that DataQ will be ready by Sep 11. • Medispan will be migrated after Julio completes DataQ
2 mins	MMS	Raghul Manoharan	• Meeting Nowfal today

Action items

- [ ]

Issues

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Due to pending Salesforce DB decision, the following has been put on hold

Sprint 11 & 12 Salesforce related WBS
Salesforce integration with DataQ
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Chat feature as it has a dependency on the back-office platform (compatibility)
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FedEX schedule pick up Change request C006.

The above has started to have an impact on the project schedule and cost. Any further delay from the agreed date for finalizing the DB decision will have a cost impact for MatchRX.

Update June 12:

During the previous week, MatchRX requested answers to few more scenarios such as clearing SF DB, reloading with MySQL DB data and updating SF DB.

HTC provided the answers.

Update June 19:

MatchRX communicated their decision that HTC can proceed with the current approach of two DBs.

Update June 26:

Steering committee meeting scheduled for Wednesday, June 27.

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Steering committee meeting was held. It was decided that MatchRX will communicate the technical and functional requirements and HTC will estimate the effort required based on the requirements.

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HTC will estimate the effort required and communicate to MatchRX

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No new updates

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Risks

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*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 16 - Week 2 Review

Date

18 Sep 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Julio
- Karen
- Ramen
- Bharath

- Mike

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• UAT 3 Cycle 2 • Word Press deployment
2 min	What's the plan for this week - MRX	Raghul Manoharan	• UAT 3 Cycle 2 • Word Press review and sign off
3 min	What was done last week - HTC	Ramprakash	• Sprint 16 - Development started for PHP & SF team • Sprint 8 - Development started for UI team
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 16 - Delivering Web & SF scope to QA • Sprint 8 - Testing & Issue fixing • UAT issue fixing
2 mins	Data migration	Raghul Manoharan	• Julio mentioned that DataQ will be ready by Sep 11. • Julio is fixing a bug on DataQ. • Medispan is being migrated
2 mins	MMS	Raghul Manoharan	• Need assistance to meet with Nowfal
2 mins	Milestone 4 planning	Raghul Manoharan	• Because of the size (effort required) of the CRs, HTC would like to deliver it across two milestones. • MatchRX mentioned that the priority should be given to MRX 3.0 related CRs over VM • Raghul to discuss with Mike and prepare the priority list for CRs.

Action items

- [ ]

Issues

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Risks

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*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Sprint 16 - Week 3 Review

Date

25 Sep 2018

Attendees

- Raghul Manoharan
- Ramprakash
- Julio
- Karen
- Ramen
- Bharath

- Mike

Goals

- Sync MRX and HTC teams

Project Status*

GREEN

Discussion items

Time	Item	Who	Notes
3 min	What was done last week - MRX	Raghul Manoharan	• UAT 3 Cycle 2 complete
2 min	What's the plan for this week - MRX	Raghul Manoharan	• UAT 3 Cycle 2 issue log clarification • Change Request prioritization
3 min	What was done last week - HTC	Ramprakash	• Sprint 16 - Delivered Web & SF scope to QA • Sprint 8 - Testing & Issue fixing • UAT issue fixing
2 min	What's the plan for this week - HTC	Ramprakash	• Sprint 16 - Testing & Issue fixing • Sprint 9 - Development started for UI team • UAT issue fixing
2 mins	Data migration	Raghul Manoharan	• DataQ migration knowledge transfer by Oct 5 (Friday) • Medispan is being migrated
2 mins	MMS	Raghul Manoharan	• Need assistance to meet with Nowfal
5 mins	Milestone 4 planning	Raghul Manoharan	Sep 18 • Because of the size (effort required) of the CRs, HTC would like to deliver it across two milestones. • MatchRX mentioned that the priority should be given to MRX 3.0 related CRs over VM • Raghul to discuss with Mike and prepare the priority list for CRs. Sep 25 • UAT 4 will start on Nov 1st week. • C007 (Shippo) & C016 (Bulk Search) will be part of UAT 4 • If C009, C010 is approved by Sep 28, it will be part of UAT 4

Action items

- [ ]

Issues

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Risks

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*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Steering Committe Meeting

Date

02 Mar 2018

Attendees

- Mike Galloway
- Julio Marchi
- Karen Pegg
- Girish Arora
- Rajeev Bhuvaneswaran
- Raghul Manoharan

Goals

- Project Review and Feedback sharing

Project Status*

GREEN

Discussion items

1. The attached power-point was presented. MatchRX - Project Steering Committee Meeting - Mar 02 2018.pptx
2. Discussed the below mentioned action items and risks.
3. Overall, MatchRX is happy with the progress.

Action items

- [ ] Raghul Manoharan - IP Phone integration with Salesforce - Out of scope - HTC to explore.
- [x] Raghul Manoharan - Upload Change Request documents to Confluence.

Issues

#	Description	Mitigation plan	Assigned to
	None		

Risks

#	Description	Mitigation plan	Assigned to
1	VM Business Process & Rules	Raghul to discuss the sprint plan with Mike.	Raghul Manoharan
2	Deployment	Categorized as a very low risk item. Julio to let everyone know if he finds it to grow into a high risk item.	Julio Marchi
3	CMS Implementation	Raghul to schedule meeting with Arun and MatchRX team to set the expectations.	Raghul Manoharan

*Key on Project Status

GREEN – Project on Track

YELLOW – Project not on track but have a plan to bring it back on track

RED – Project not on track and need a plan to bring it back on track

Tech Discussion - 4th June, 2018

Date

04 Jun 2018

Attendees

- Julio Marchi
- Ramen Das
- Senthil

Goals

- Sprint 0 Demo and Code walk-through

Discussion items

Date	Item	Who	Notes
06/02	Sprint 0 Demo	• Julio Marchi • Ramen Das • Senthil	• Ramen and Senthil demonstrated following pages developed using new UI technologies: 1. Login page 2. My Wish-list 3. Top Wish-list 4. My Orders – In progress 5. Sell History 6. Buy History 7. VM Registration • Julio well received the demo and appreciated the initial DEMO • Julio suggested couple of things in terms of UI discrepancies like 1. Header labels should not repeat in the individual cells 2. Font in the order or wish list page should be a bit bigger 3. Table header and content above should be frozen such that scrolling does not hide it • Ramen and Senthil well received the feedback and will look into resolving these and report back to Julio if there would be any technical challenges.
06/02	Code Walk-through	• Julio Marchi • Ramen Das • Senthil	• Senthil gave a code walk-through 1. Demonstrated the project folder structure 2. Showed the controller code flow 3. Walked Julio through the development environment setup

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussion - 5th July, 2018

Date

05 Jul 2018

Attendees

- Ramen Das
- Julio Marchi
- Senthil

Goals

- Technical debt clearance

Discussion items

Time	Item	Who	Notes
12 min	MatchMoney	Ramen Das	• We are anticipating delays on MatchMoney delivery as code walk through and requirement analysis took time. • Julio explained about how data would be stored in the MatchRX DB
8 min	Session Management	All	• Ramen and Senthil explained about the session management issues for window or tab close situations • Julio shared some code snippets on how to fix that • Senthil will analyse the code and see this really works in the current implementation.
2 min	Medispan	All	• Julio needs more time (maybe couple of weeks) to discuss about it

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussion - 7th June, 2018

Date

07 Jun 2018

Attendees

- Julio Marchi
- Ramen Das
- Senthil

Goals

- Clear technical backlog

Discussion items

Time	Item	Who	Notes
10 min	Match Money design and code walkthrough	@All	• Postponed until 12th June, 2018 as Julio needs more preparation • All understood that there might be a delay in the integrating component
10 min	User Activity Logs	@All	• Senthil and Ramen presented the data model with Julio • Julio commented about few fields as mentioned in the attached model sheet • Julio suggested to have two tables for MRX and VM
3 min	In page update or edit	@All	• Julio would share the design or code soon

Action items

- [ ] Match money code walk-through and design
- [ ] In page editing code

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussion - 9th Aug, 2018

Date

09 Aug 2018

Attendees

- Raghul Manoharan
- Ramen Das
- Julio Marchi
- Senthil
- deepak.sharma

Goals

- Technical Discussion

Discussion items

Time	Item	Who	Notes
15 min	Salesforce admin panel demo and acceptance	Raghul Manoharan deepak.sharma	• Ramen shared the attached document on the screen and Deepak explained the document to everyone. • Julio applauded Deepak's effort and proposed solution. • Julio mentioned that the proposed solution answers 98% of issue (error handling) and asked Deepak if the below is possible: An system automated trigger, based on number of failed transactions, to freeze all Salesforce users to prevent more failed transactions being created. • Deepak mentioned the freeze/unfreeze mentioned in the Slide 6 and 7 is out of the box and the requested system automated trigger is not available out of the box. • Deepak mentioned he will explore for solutions and respond by next week.
2 min	Data Q cron job	Julio Marchi	• Julio planning to finish it by mid next week
10 min	Performance issues	Ramen Das Julio Marchi	• Continued discussion about Infra vs Code • Julio yet to setup environment in a new infrastructure as discussed last time • Senthil will check-in his code bypassing PHP and share detail with Julio • Julio suggested Senthil to continue with the regular work for now and discuss more next week. • Ramen will setup a meeting with Julio to discuss and have a working session to see where improvement can be done

Action items

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussion - 12th July, 2018

Date

12 Jul 2018

Attendees

- Senthil
- Ramen Das
- Julio Marchi

Goals

- Clearing technical debt.

Discussion items

Time	Item	Who	Notes
10 min	Session management	All	• Senthil will follow 2nd approach as suggested by Julio • 30 secs ping would be in place • Ping configuration or any other settings should be in the configuration file
10 min	Custom Report	All	• Julio would check with Mike once but there is a possibility that we don't need any custom reports as Salesforce report might suffice.
10 min	Data Q	All	• Julio would get back to us by next week
2 min	Misc.	All	• Per Julio mobile application would be validated by Alton and Mike • Ramen and Julio will discuss and document about production deployment process soon
1 min	Data Migration	All	• More information next week

Action items

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussion - 12th June, 2018

Date

12 Jun 2018

Attendees

- Ramen Das
- Julio Marchi
- Senthil

Goals

- Technical backlog clearance

Discussion items

Time	Item	Who	Notes

20 min	Match Money code walkthrough	All	• Julio had a MatchMoney business scenario walkthrough showing how it has been used in the UI
			• Julio had a code walkthrough of MatchMoney
			• Senthil/Ramen well-received the currently developed MatchMoney code, one more walkthrough might be needed.
			• Julio would provide
			  ◦ Configuration
			  ◦ DB schema or model
			  ◦ Description of functions to be used
			  ◦ Skeleton of the array
			HTC might need the lifecyle function

5 min	Password generation process	All	• Postponed until Monday or Tuesday • HTC will send an email about code implementation
5 min	In page (quick) edit code	All	• Julio demonstrated backend code on how data has been received.

Action items

☐

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussion - 17th July, 2018

Date

17 Jul 2018

Attendees

- Ramen Das
- Julio Marchi
- Senthil

Goals

- Technical debt. clearance

Discussion items

Time	Item	Who	Notes
10 min	Mostly discussed about the development environment setup in Julio's machine	ALL	• Session issues pointed out • Julio suggested Senthil to move the session to the DB and asked for the estimation
10 min	Miscellaneous	ALL	• Senthil will research the issues came across during DEV setup • Team will reconvene again on 18th July at 10:00AM IST

Action items

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussion - 18th July, 2018

Date

18 Jul 2018

Attendees

- Ramen Das
- Julio Marchi
- Senthil

Goals

- Technical debt. clearance

Discussion items

Time	Item	Who	Notes
10 min	Application performance issues	Julio Marchi	• Julio pointed application performance issues while loading the dashboard page • Julio tried one more time after enabling minification of JS files and latest code. This time it improved a bit but not significantly • Senthil tried same application in HTC environment which was quite faster • Senthil tried both DEV and Stage in HTC environment. DEV performed better than stage • Julio said he would look into it why it performing slow in MatchRX environment • Ramen and Senthil also promised that they will look into the issue.

Action items

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussion - 19th July, 2018

Date

19 Jul 2018

Attendees

- Ramen Das
- Julio Marchi
- Senthil

Goals

- Technical debt. clearance

Discussion items

Time	Item	Who	Notes
3 min	Custom Reports	All	• Julio will check with Mike today (19th July) if we need custom reports
12 min	Data Q	All	• Julio would provide the Data Q view • MRX would have a cron job to pull data from the view • Julio would develop the cron job to populate the data q in the MRX side • Cron job would execute once in a week • Senthil will check with the Salesforce team about update and insert operations in their DB • Cron job would be available by next week
2 min	Performance Issue	All	• Needs more research. So postponing the discussion until next week
10 min	Inline edit	All	• Raghul demo-ed the my posting page to Julio • Julio provided feedback on UI (Green background inside of the green font) • Julio explained to Senthil on how the 20 ms timer should hit the server only if there is a change in value.

Action items

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussion - 19th June, 2018

Date

19 Jun 2018

Attendees

- Julio Marchi
- Ramen Das
- Senthil

Goals

- Technical debt. clearance

Discussion items

Time	Item	Who	Notes
2 min	MatchMoney discussion	All attendees	1. Received DB schema sent by Julio 2. Pending other items like skeleton of the array, function description and configuration would be provided either end of this week or early next week
10 min	Password encryption	All attendees	1. Cost enhancement would be implemented some time towards end of June or early July
3 min	User migration DB update	All Attendees	1. Demonstrated the table updates with Julio, he agreed the update. 2. Julio asked a copy of the structure laid out by Senthil.

Action items

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussion - 21st June, 2018

Date

21 Jun 2018

Attendees

- Raghul Manoharan
- Julio Marchi
- Ramen Das
- Senthil

Goals

- Clear technical debts and status

Discussion items

Time	Item	Who	Notes
10 min	Data Migration	All	1. Ramen made aware of data migration impact on Salesforce side. 2. Ramen asked Julio about any thought process or work around planned for data migration process with respect to Salesforce 3. Julio does not have much idea at this moment but will let us know at later point. 4. Julio also discussed about deployment plan and process around it 5. Deployment would be taken care by MatchRX team, HTC would help whatever possible way for a smooth deployment.
10 min	MMS service porting	All	1. Ramen explained porting of MMS services in a separate environment and reason behind it. 2. Julio accepted the idea and approved it and will make available the necessary infrastructure 3. Actions items for these new services: a. New Bitbucket project b. New project – laravel/lumen c. New DNS d. New Server e. New END point

10 min	MatchMoney	All	1. Ramen pointed out concern about delays in MatchMoney code from MatchRX 2. Ramen also pointed this delay might impact project deadline which is already a week behind 3. Raghul asked Julio about any specific date that he is looking at for MatchMoney code delivery to HTC 4. Julio promised 29th June as the best possible date to deliver the code 5. Raghul mentioned more delays might incur timeline and cost

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussion - 24th July, 2018

Date

24 Jul 2018

Attendees

- Julio Marchi
- Ramen Das
- Senthil
- deepak.sharma
- Raghul Manoharan

Goals

- Technical status updates and questions

Discussion items

Time	Item	Who	Notes
15 min	Custom Reports – Reportico	Ramen Das Senthil	1. Ramen given a brief overview about Reportico 2. Senthil did a walkthrough of the existing Reportico implementation 3. The demo was well-received by Julio 4. Julio had couple of questions about some of the features of Reportico like Assignments, Graphs and Pre-SQL which HTC yet to explore 5. Ramen and Senthil pointed out to Julio that a user with moderate technical knowledge could able to handle Reportico features
10 min	Julio updated about the Data Migration work	Julio Marchi	1. Julio had a question about Longitude and Latitude columns of the Pharmacy table 2. Ramen and Senthil clarified that these two columns were brought in with respect to DB design perspective 3. Ramen suggested Julio to inform HTC as early as possible just in case he finds any discrepancies or issues with any table columns or tables
15 min	Application performance	Julio Marchi	1. Julio brought the application performance issues again and asked if HTC has looked into it 2. Ramen said as team is busy for the UAT release, team does not have enough time to dig deep into it but look into it shortly 3. Ramen also suggested Julio to find out any network latency issues on the MatchRX side as same application performed well on HTC infrastructure
15 min	Salesforce data synch up issue	Deepak	1. Ramen briefed about issues with data synch up in Salesforce side when service call fails on the PHP side 2. Julio questioned why reversal is not possible which Deepak explained technically 3. Deepak said if it would have been custom fields it might have been possible but custom fields infested Salesforce application is meaningless as you lose the real SF features. 4. Finally Julio agreed for a admin console kind of a design to revert the changes manually in case of an error

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussion - 24th May, 2018

Date

Attendees

- Raghul Manoharan
- Julio Marchi
- Ramen
- Senthil

Goals

- Technical backlog clarification

Discussion items

Date	Item	Who	Notes	Status/Decision
05/24	Salesforce datastore integration design discussion	Raghul Manoharan/Ramen/Julio	• Had a brief discussion about the status but parked it for further discussion pending HTC internal assessment	In Progress
05/24	In page edit challenges discussion	Raghul Manoharan/Ramen/Julio	• HTC offshore team wanted to let Julio know about the couple of challenges implementing in page editing • Because of screen sharing issues, the discussion postponed until Friday, 25th 6:45 EST	In Progress
05/24	Match Money code walkthrough discussion	Senthil/Julio/Ramen	• Julio needs more time (maybe early next week) to walk us through the code • Meanwhile Julio might prepare some documentation for better reference • Discussing this on Tuesday again	In Progress
05/24	Image file folder structure discussion	Senthil/Ramen/Julio	• Senthil had issues showing nophotos.png image when there were not image found • Ramen and Julio suggested to handle this scenario more through coding then server configuration	Done

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussion - 25th May, 2018

Date

Attendees

- Raghul Manoharan
- Julio Marchi
- Ramen Das
- @senthil

Goals

- In page editing

Discussion items

Date	Item	Who	Notes	Status/Decision
05/25	In page edition	Julio Marchi Ramen Das Raghul Manoharan	• Julio had a walk-through of the existing in page edition coded in the MRX 2.0 • HTC understood and follow the same pattern • Error or validation messages would be an popup or modal window. • Any amount or percentage would be a slider to move down or up	Done

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussion - 5th June, 2018

Date

05 Jun 2018

Attendees

- Raghul Manoharan
- Ramen Das
- Senthil
- Julio Marchi
- Maguesh Balakrishnan

Goals

- Technical debt. clearance

Discussion items

Time	Item	Who	Notes
12 min	APNs vs FCM	• Raghul Manoharan • Ramen Das • Senthil • Julio Marchi • Maguesh Balakrishnan	• Mageush explained about APNs and FCM to Julio briefly • Julio was concerned about the pricing model of FCM and alternative solutions if any or asked for more insight • Mageush quickly found out FCM pricing model which is free • Julio agreed to go ahead with FCM
7 min	Device vs App (user) level Notification	• Raghul Manoharan • Ramen Das • Senthil • Julio Marchi • Maguesh Balakrishnan	• Raghul explained about the notification requirement briefly • Julio agreed to have App (user) level notifications but wanted confirm with Mike • When asked about the development process, Julio gave green signal to continue with the above approach (App notification), don't have to wait until Mike's confirmation
10 min	User Activity logs	• Raghul Manoharan • Ramen Das • Senthil • Julio Marchi • Maguesh Balakrishnan	• Ramen and Senthil asked Raghul and Julio about the requirement • Raghul brought up a list of items to be logged which would be shared or may have already shared in the confluence. • Julio suggested to have a separate database or schema for activity logs which might help in future project needs • Senthil laid out a quick table and presented to the audience which Julio quickly acknowledged and confirmed its almost what he is envisioning • HTC and Julio would together to come up with the final DB model for user activity logs
1 min	Match Money design and code walk-through	• Raghul Manoharan • Ramen Das • Senthil • Julio Marchi • Maguesh Balakrishnan	• Julio requested to push it to Thursday

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Tech Discussionn - 3rd July, 2018

Date

03 Jul 2018

Attendees

- Ramen Das
- Julio Marchi
- Senthil

Goals

- Clearing technical debts

Discussion items

Time	Item	Who	Notes
12 min	MatchMoney	All	1. Senthil had few questions about MatchMoney which Julio answered. Attached email has the detail 2. Senthil had a question on when MatchMoney table should be populated. Julio suggested to populate the table when order is placed and confirmed 3. Senthil would document and share the understanding either through code review or email documentation

12 min	Backend Validation	All	1. Ramen suggested Julio to consider minimal backend validation, consider only important validations for the security of the application. 2. Julio's main concern was SQL Injection vulnerability 3. Senthil clarified that Laravel takes care of SQL Injection vulnerability automatically as part of incoming requests scanning 4. Senthil and Ramen also confirmed that necessary backend business validations are already implemented but double check one more time. 5. Ramen and Senthil suggested Julio to go through the code to see if business validations are in place. 6. Overall Julio was fine having SQL Injection being taken care of (through Laravel) and necessary business validations are in place
5 min	Data Q	All	1. Julio informed that Data Q process is a monthly activity and it processes automatically in the current system 2. Julio is open to ideas of consuming the incoming Data Q information either through MySQL DB or directly into SF 3. Julio would have more updates about Data Q in 2/3 weeks
10 min	Laravel Queue needs plugin installation	All	1. Senthil explained why an asynchronous process in needed and how the design should be. 2. This process needs a specific plugin to be installed in the linux box as a part of first time deployment 3. Julio is fine with that but wanted HTC to send an email to Victor (cc Julio) mentioning about the process such that Victor can make a decision in terms of infrastructure and deployments need.
2 min	DB Dump	Julio Marchi	1. At the end of the call Julio wanted existing database dump (DML/DDL) such that he can setup development and deployment environments in MatchRX side. Senthil will send the DB as early as Wednesday.

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Technical Discussions - 10th May Until 18th May, 2018

Date

Attendees

- Ramen
- Julio Marchi
- Senthil

Goals

- Technical clarifications to proceed further

Discussion items

Date	Item	Who	Notes	Status/Decision
05/11	Project structure finalization (please refer attachment)		• We are in an agreement about the structure. In addition we need to add folders under Assets and Views on the Blade side and mrx/vm/oauth under Database on REST API side.	Done
05/11	MMS Code		• REST services were provided by Julio during the call. • Nowfal will provide the code and manual (architecture). Ramen will send an email to Nowfal.	In progress
05/11	Email logging (storing)		• Store the emails into the local database not external storage • One function to send email and another one to store email content (variable already have content) • Julio can provide sample code if needed, also current structure.	Done
05/11	DB review (please refer attachment)		• Ongoing activity. Might complete review by next week.	Done
05/14	Project structure		• Julio suggested to merge Blade folders into the REST side of the Laravel to have a single Laravel Instance • Senthil would do a POC and touch base again on Friday at 8:30AM EST to see discuss about issues • Senthil mentioned about using curl or JQuery ajax which might impact performance because of one additional call to the services each time. This needs additional efforts as well. • Ramen mentioned about slight delays in the delivery because of this change. Possibly additional one week which Julio suggested to see if we can catch up later. • Julio would go through the code on Friday (developed POC) • Julio also asked about Mobile application integration with the backend code which Ramen would check with Mobile team and gather information.	Done

05/14	Auto-generated order #		• Ramen suggested couple of options how we can generate order number
			• Julio and Senthil came to an agreement with the following approach
			  ◦ Auto generate: Asked to generate random number and compare in DB for unique.
			  ◦ For 3.0 we can increase one digit so we can avoid conflict of 2.0 order number.
			  ◦ For VM, we can prefix a letter to differentiate VM order
			• Julio will provide existing MatchRX 2.0 order generation code soon
				Done

05/14	Data synch failure		• Julio does not have much idea about Salesforce integration, so agreed to have best possible solution available.	Done
05/14	User activity log		• Julio would do some research and let HTC know about it.	In Progress

05/14	Image file storage		• Julio explained the file upload and access processes using Linux NAS structure and Apache configuration
			• MatchRX team would do the mounting of the folder where images and labels would be stored.
			• HTC understood the file structure and process needed to get this implemented. Example:
			  ◦ Images -> stocks -> 1 to z folders
			  ◦ Images -> users -> user_id folder
			  ◦ FedEx -> label -> Year -> Month -> Date
				Done

05/17	Project structure overview		• Julio was happy and agreed with the current project structure laid out by Senthil • Julio agreed and suggested to use Curl and Ajax calls as and when needed. Example: for partial page refresh or quick search ajax can be used • Senthil had a nice code work through and asked for early feedback if any • Julio likes to have more code comments, more meaningful ones • Ramen promised to have existing code into the MatchRX git repository as soon as MatchRX git credentials were created and passed. • Ramen liked to have another discussion on 18th if anything spills over from today's call • Julio hinted there could be name change of one of the projects but not finalized yet. • Ramen hinted some additional effort in all levels (Salesforce/Mobile/Web) when project name change happens • Julio suggested to have consistency of project folder names (Upper case/Lower case/Camel case). Senthil explained about the structure on why some cases it was in lower case.	

05/17	MediSpan		• Julio would like to touch base again next week either to have a code walkthrough or data dump that might be needed. • Existing DB view should be provided by MatchRX soon.	
05/17	Amazon API Integration		• HTC need to do little more ground work • Julio needs little more time to understand this requirement.	
05/17	Custom Report Engine		• Raghul and Julio quickly discussed about what could be the next steps. • Julio speculated that there might not be a need as it's more like a Salesforce thing. However, Julio suggested to park this at least until June for further discussion.	
05/17	Match Money		• Julio would have a code walkthrough session next week (Thursday). • Julio suggested to include the Match Money code into the existing (new) project. Also suggested there might be minimal code change after code inclusion.	
05/17	DB review (Round 3, possibly final)		• Julio did a quick look at the DB Model and happy about it. • Suggest 99% ok but have a look at once and would provide feedback soon.	

Action items

- [ ]

Issues

#	Description	Mitigation plan	Assigned to

Risks

#	Description	Mitigation plan	Assigned to

Technical

Deployment Setup

Step-by-step guide

Related articles

- Technical

Deployment Process and Steps

- PHP Application deployment
  - Repository access
  - Installation or copy
  - Configuration changes
    - Reference to Saleforce URL
  - Permissions
  - Server settings
- Database Setup
  - Schema creation
  - Migration Steps
  - Data update/seeder
- Salesforce Application Deployment/Creation
  - Sandbox Creation
    - URL

Technological and Design Decisions

Tech Stack

Status	DONE
Stakeholders	Julio Marchi Ramen Das Raghul Manoharan Ramprakash
Outcome	
Due date	08 Jun 2018
Owner	Ramen Das

Background

Technologies used in the project and their version numbers

- **Backend (Services) technologies:**
  - PHP 7.2.4
  - Laravel 5.6

- **UI Technologies:**
  - jQuery 3.3
  - Bootstrap 4.1.0
  - HTML5
  - CSS3
- **Database :**
  - MySQL 5.7
- **Dependencies :**
  - jQuery validate 1.17.1 (Form Validations)
  - Popper JS 1.12.6 (Bootstrap Modal Dependency)
  - Bootstrap material design JS 4.1.1 (Material Design Dependency)
  - Material Design Component 1.3.0 (Material Design Dependency)
  - jQuery.tabledit (Inline edit)
  - Bootstrap JS 3.1.1
  - Bootstrap material design 4.0.0 (Material Design Dependency)

Action items

- [x] Approved by Julio Marchi

UI - Web

Sprint 2

File	Modified
MRX-Registration-Login-Forgot-Flow-V11.pdf	May 04, 2018 by Raghul Manoharan

Drag and drop to upload or browse for files

Sprint 3

File	Modified
VM-Registration-Company-Menu-V5.pdf	May 04, 2018 by Raghul Manoharan

Drag and drop to upload or browse for files

Sprint 4

File	Modified
sprint-4-Web-Buy-Menu-Export.pdf	May 04, 2018 by Raghul Manoharan
Sprint 4-Web Post-Edit-Post.pdf	May 04, 2018 by Raghul Manoharan

Drag and drop to upload or browse for files

Download All

Sprint 5

File	Modified
US-6-User-management-dashboard-V5.pdf	May 04, 2018 by Raghul Manoharan
web-US-17-Match-RX-FO_Search.pdf	May 04, 2018 by Raghul Manoharan
web-US-17-Match-RX-FO_Sort.pdf	May 04, 2018 by Raghul Manoharan
web-US-19-MRX-prod-details-V3.pdf	May 04, 2018 by Raghul Manoharan
web-US-24-_VM-Buy-Menu_V3.pdf	May 04, 2018 by Raghul Manoharan

Drag and drop to upload or browse for files

Download All

Sprint 6

File	Modified

No files shared here yet.

Drag and drop to upload or browse for files

Sprint 7

File	Modified

No files shared here yet.

Drag and drop to upload or browse for files

Sprint 8

File	Modified

No files shared here yet.

Drag and drop to upload or browse for files

Sprint 9

File	Modified

No files shared here yet.

Drag and drop to upload or browse for files

Mobile

File	Modified
Match_RX_App_Login,Forgot Password, Hamburger Menu and My Account-V3.pdf	2 minutes ago by Saravanan

Drag and drop to upload or browse for files

MRx

File	Modified

No files shared here yet.

Drag and drop to upload or browse for files

VM

File	Modified

No files shared here yet.

Drag and drop to upload or browse for files

User Stories

Create User Story

Sprint 12 (Jun 18 - Jul 6)

Document Status Flow DRAFT DISCUSSING REVIEW IN PROGRESS APPROVED BEING REVISED

User Story #	Document status
US 47 - VM Order Flowchart	APPROVED
US 24 - VM Buy Menu	APPROVED
US 50 - BO List of all Orders in VM	APPROVED
US 57 - Chat	APPROVED
US 56 - BO Emails	APPROVED
US 52 - VM Seller My Dashboard	APPROVED
US 54 - BO VM Reports	APPROVED
US 55 - BO User Activity	APPROVED
US 51 - VM Buyer My Dashboard	APPROVED

Sprint 11 (May 28 - Jun 15)

Document Status Flow DRAFT DISCUSSING REVIEW IN PROGRESS APPROVED BEING REVISED

User Story #	Document status
US 34 - VM Post item	APPROVED
US 49 - MRX 3.0 My Dashboard	APPROVED
US 47 - VM Order Flowchart	APPROVED
US 30 - MRX 3.0 Order Life-cycle Version 2 (Latest)	APPROVED
US 53 - BO Prospects	APPROVED
US 36 - BO Financial Transactions	APPROVED

Sprint 10 (May 07 - May 25)

Document Status Flow	DRAFT	DISCUSSING	REVIEW IN PROGRESS	APPROVED	BEING REVISED

User Story #	Document status
US 34 - VM Post item	APPROVED
US 49 - MRX 3.0 My Dashboard	APPROVED
US 24 - VM Buy Menu	APPROVED
US 50 - BO List of all Orders in VM	APPROVED
US 6 - Pharmacy/VM Wholesaler Menu	APPROVED
US 45 - VM Seller My Orders	APPROVED
US 46 - VM Buyer My Orders	APROVED
US 39 - Mobile Order Life-cycle	APPROVED
US 7 - My Savings	APPROVED
US 43 - VM My Favorites	APPROVED
US 41 - VM Product Details	APPROVED

Sprint 9 (Apr 16 - May 04)

Document Status Flow	DRAFT	DISCUSSING	REVIEW IN PROGRESS	APPROVED	BEING REVISED

User Story #	Document status
US 35 - VM My Postings and Edit a posting	APPROVED
US 42 - VM Cart & Checkout page	APPROVED
US 24 - VM Buy Menu	APPROVED
US 30 - MRX 3.0 Order Life-cycle Version 2 (Latest)	APPROVED

US 36 - BO Financial Transactions	APPROVED
US 44 - BO Pharmacy Reports	APPROVED
US 40 - Mobile My Orders	APPROVED
US 48 - BO Document Template	APPROVED

Sprint 8 (Mar 26 - Apr 13)

Document Status Flow DRAFT DISCUSSING REVIEW IN PROGRESS APPROVED BEING REVISED

User Story #	Document status
US 34 - VM Post item	APPROVED
US 31 - BO List of all Orders in MRX 3.0	APPROVED
US 29 - MRX 3.0 My Orders	APPROVED
US 30 - MRX 3.0 Order Life-cycle Version 2 (Latest)	APPROVED
US 36 - BO Financial Transactions	APPROVED
US 38 - BO List of all Postings in VM	APPROVED
US 21 - Mobile Buy Menu	APPROVED

Sprint 7 (Mar 5 - Mar 23)

Document Status Flow DRAFT DISCUSSING REVIEW IN PROGRESS APPROVED BEING REVISED

User Story #	Document status
US 35 - VM My Postings and Edit a posting	APPROVED
US 31 - BO List of all Orders in MRX 3.0	APPROVED
US 6 - Pharmacy/VM Wholesaler Menu	APPROVED
US 30 - MRX 3.0 Order Life-cycle Version 2 (Latest)	APPROVED
US 37 - BO VM Posting Categories	APPROVED
US 33 - Mobile Wishlist	APPROVED
US 21 - Mobile Buy Menu	APPROVED
US 19 - MRX 3.0 Product Details	APPROVED

Sprint 6 (Feb 12 - Mar 2)

Document Status Flow DRAFT DISCUSSING REVIEW IN PROGRESS APPROVED BEING REVISED

User Story #	Document status
US 31 - BO List of all Orders in MRX 3.0	APPROVED
US 23 - BO List of all Postings in MRX 3.0	APPROVED
US 6 - Pharmacy/VM Wholesaler Menu	APPROVED
US 29 - MRX 3.0 My Orders	APPROVED
US 28 - MRX Cart & Checkout page	APPROVED
US 25 - BO Member Details Page	APPROVED
US 17 - MRX 3.0 Buy Menu	APPROVED
US 21 - Mobile Buy Menu	APPROVED
US 32 - Mobile Checkout page	APPROVED
US 19 - MRX 3.0 Product Details	APPROVED
US 27 - MRX 3.0 Wishlist	APPROVED

Sprint 5 (Jan 22 - Feb 9)

Document Status Flow DRAFT DISCUSSING REVIEW IN PROGRESS APPROVED BEING REVISED

User Story #	Document status
US 8 - MRX 3.0 & Mobile - Post an item	APPROVED
US 23 - BO List of all Postings in MRX 3.0	APPROVED
US 6 - Pharmacy/VM Wholesaler Menu	APPROVED
US 25 - BO Member Details Page	APPROVED
US 17 - MRX 3.0 Buy Menu	APPROVED
US 26 - Mobile Product Details	APPROVED
US 22 - Mobile My Postings and Edit a posting	APPROVED

Sprint 4 (Dec 25 - Jan 19)

Document Status Flow DRAFT DISCUSSING REVIEW IN PROGRESS APPROVED BEING REVISED

User Story #	Document status
US 8 - MRX 3.0 & Mobile - Post an item	APPROVED
US 14 - MRX 3.0 My Postings and Edit a posting	APPROVED
US 13 - BO Member Search	APPROVED

US 20 - BO Restricted NDCs	APPROVED
US 17 - MRX 3.0 Buy Menu	APPROVED
US 18 - BO Manage Pharmacy Group	APPROVED

Sprint 3 (Dec 4 - Dec 22)

Document Status Flow DRAFT DISCUSSING REVIEW IN PROGRESS APPROVED BEING REVISED

User Story #	Document status
US 3 - Guest Login	APPROVED
US 8 - MRX 3.0 & Mobile - Post an item	APPROVED
US 6 - Pharmacy/VM Wholesaler Menu	APPROVED
US 4 - Single Sign on	APPROVED
US 12 - VM Wholesaler Registration Page	APPROVED
US 1 - MRX 3.0 & VM Buyer Registration Page	APPROVED
US 13 - BO Member Search	APPROVED
US 11 - BO User Management	APPROVED

Sprint 2 (Nov 13 - Dec 1)

Document Status Flow DRAFT DISCUSSING REVIEW IN PROGRESS APPROVED BEING REVISED

User Story #	Document status
US 3 - Guest Login	APPROVED
US 6 - Pharmacy/VM Wholesaler Menu	APPROVED
US 4 - Single Sign on	APPROVED
US 1 - MRX 3.0 & VM Buyer Registration Page	APPROVED
US 16 - Mobile Hamburger Menu & Pharmacy Info	APPROVED
US 15 - Mobile Login	APPROVED
US 10 - BO User Creation	APPROVED
US 9 - BO Login	APPROVED
US 11 - BO User Management	APPROVED

All User Stories

Document Status Flow	DRAFT	DISCUSSING	REVIEW IN PROGRESS	APPROVED	BEING REVISED

User Story #	Document status
US 34 - VM Post item	APPROVED
US 35 - VM My Postings and Edit a posting	APPROVED
US 3 - Guest Login	APPROVED
US 49 - MRX 3.0 My Dashboard	APPROVED
US 47 - VM Order Flowchart	APPROVED
US 8 - MRX 3.0 & Mobile - Post an item	APPROVED
US 42 - VM Cart & Checkout page	APPROVED
US 24 - VM Buy Menu	APPROVED
US 50 - BO List of all Orders in VM	APPROVED
US 31 - BO List of all Orders in MRX 3.0	APPROVED
US 23 - BO List of all Postings in MRX 3.0	APPROVED
US 6 - Pharmacy/VM Wholesaler Menu	APPROVED
US 29 - MRX 3.0 My Orders	APPROVED
US 4 - Single Sign on	APPROVED
US 30 - MRX 3.0 Order Life-cycle Version 2 (Latest)	APPROVED
US 53 - BO Prospects	APPROVED
US 12 - VM Wholesaler Registration Page	APPROVED
US 1 - MRX 3.0 & VM Buyer Registration Page	APPROVED
US 57 - Chat	APPROVED
US 56 - BO Emails	APPROVED
US 28 - MRX Cart & Checkout page	APPROVED
US 36 - BO Financial Transactions	APPROVED
US 25 - BO Member Details Page	APPROVED
US 52 - VM Seller My Dashboard	APPROVED
US 14 - MRX 3.0 My Postings and Edit a posting	APPROVED
US 54 - BO VM Reports	APPROVED
US 55 - BO User Activity	APPROVED

US 45 - VM Seller My Orders	APPROVED
US 46 - VM Buyer My Orders	APROVED
US 51 - VM Buyer My Dashboard	APPROVED
US 39 - Mobile Order Life-cycle	APPROVED
US 16 - Mobile Hamburger Menu & Pharmacy Info	APPROVED
US 44 - BO Pharmacy Reports	APPROVED
US 7 - My Savings	APPROVED
US 43 - VM My Favorites	APPROVED
US 41 - VM Product Details	APPROVED
US 40 - Mobile My Orders	APPROVED
US 48 - BO Document Template	APPROVED
US 38 - BO List of all Postings in VM	APPROVED
US 37 - BO VM Posting Categories	APPROVED
US 13 - BO Member Search	APPROVED
US 20 - BO Restricted NDCs	APPROVED
US 33 - Mobile Wishlist	APPROVED
US 17 - MRX 3.0 Buy Menu	APPROVED
US 21 - Mobile Buy Menu	APPROVED
US 26 - Mobile Product Details	APPROVED
US 22 - Mobile My Postings and Edit a posting	APPROVED
US 32 - Mobile Checkout page	APPROVED
US 19 - MRX 3.0 Product Details	APPROVED
US 27 - MRX 3.0 Wishlist	APPROVED
US 18 - BO Manage Pharmacy Group	APPROVED
US 15 - Mobile Login	APPROVED
US 10 - BO User Creation	APPROVED
US 9 - BO Login	APPROVED
US 11 - BO User Management	APPROVED

US 1 - MRX 3.0 & VM Buyer Registration Page

WBS #								
	Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
	MHX-75	WBS 6: PHP VM Buyer Application	Feb 12, 2018 18:32		rajasekar.jeyakumar@htcindia.com	PROD READY	Unresolved	Sprint 3
	MHX-15	WBS 4: Pharmacy Application	Jan 22, 2018 22:09		V	CLOSED	Unresolved	Sprint 2
	MHX-14	WBS 3: Registration application and CRM integration	Jan 02, 2018 23:38		V	CLOSED	Unresolved	Sprint 2
	MHX-13	WBS 2: New Application Check and Data population from DataQ	Jan 18, 2018 23:49		Raja Ponnuswamy	CLOSED	Unresolved	Sprint 2
	4 issues							
Document status	APPROVED							
Document owner	Raghul Manoharan							
UI Developer								
Developers								
QA								

Table of Contents

User Story

As a user of MatchRx.com website, I want a registration webpage so that I can provide the required information to register for MRX 3.0/VM buyer

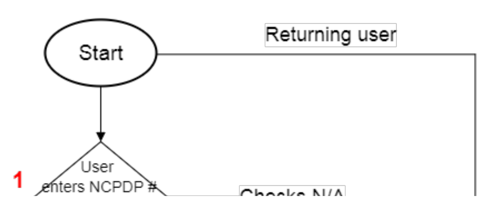
End Objective:	To provide an application page for the users to register for MRX 3.0/VM buyer and capture the information in MRX database

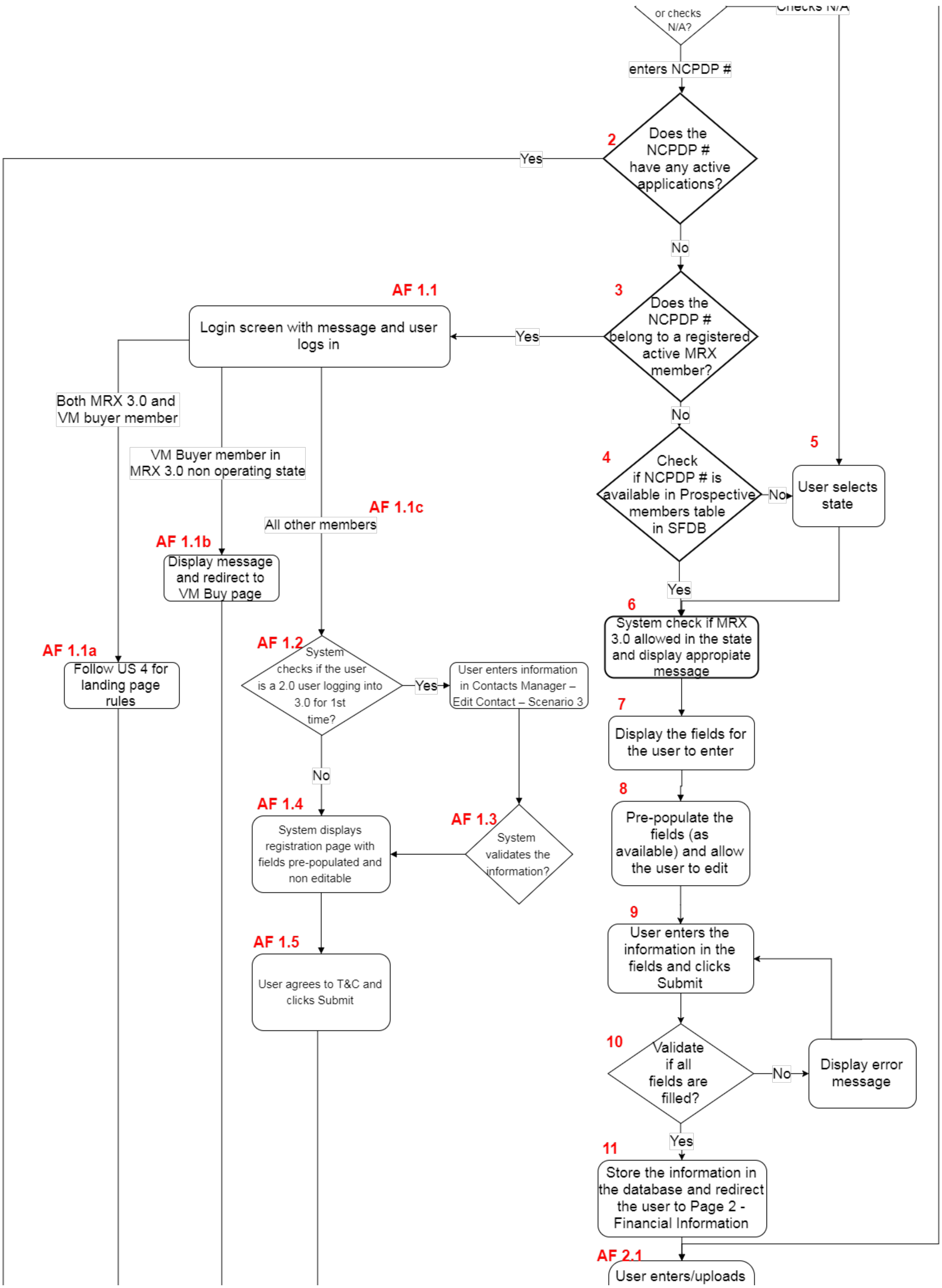
User/Actor:	All users of MatchRx.com website
Program Type:	Webpage and Salesforce CRM
Trigger:	Click on "Free Registration" link in the homepage of www.matchrx.com
Related User Story:	US 4 - Single Sign on
Related WBS #:	2-4, 6

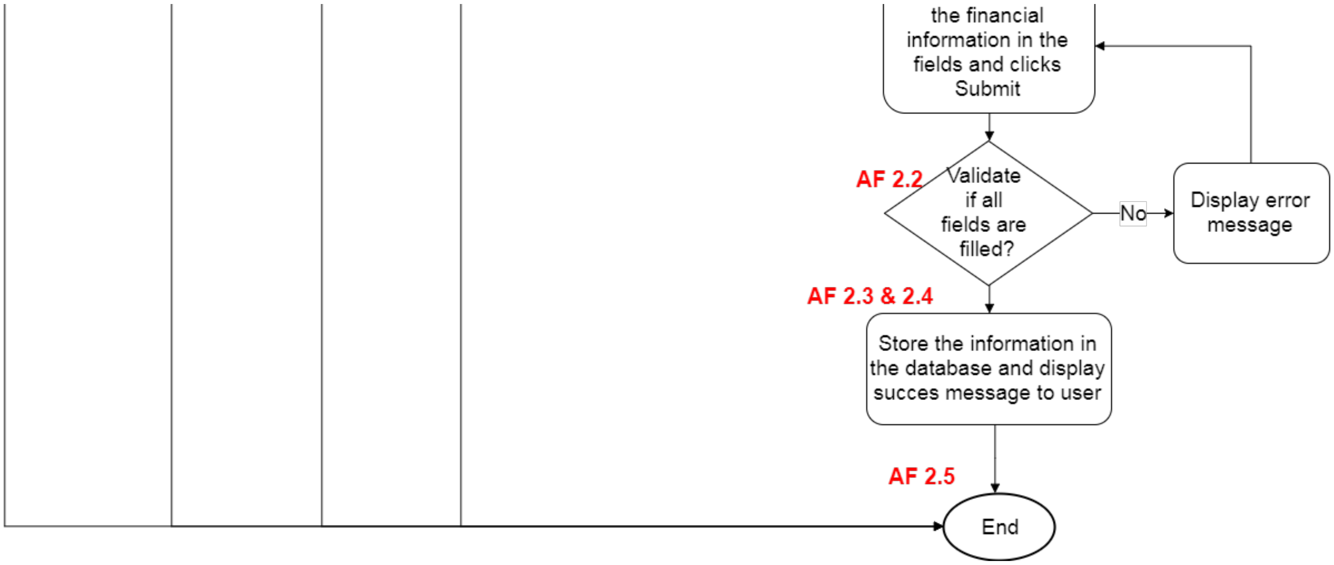
Related WBS Description:

2	Any new membership application should be checked against DB: if this business entity is found in database updated by DataQ- common information should be reused. Only missing info should be providedNCPDP # will be primary data entered by new user.For non-registered MRX members, Data Fields should be populated based on NCPDP # from Database - DataQDB is incrementally updated on 1st of every month by DataQ. DataQ data will only update the non-member record in the database. The data of pharmacies that are newly registered with DataQ (after the last data update from DataQ) will not be populated on MatchRx registration page. These pharmacies have to enter the details.Already registered active MRX members should be checked against DB (registered MRX database) and be notified that they have already registered and prompted to log in.
3	All data validation happens on the API gatewayAll mandatory field validations are performed on the webpage before the form is submitted (disable Submit button)
4	The home page will be common for VM and 3.0. The hompage will be split vertical and one section will be dedicated for VM and the other for 3.0 with options to sign up.Two separate sign up pages (VM, 3.0) will be maintain in the website. 3.0 sign up pageEnter Zip code:If the zip code is from a state which 3.0 doesn't operate. Notify user and allow to provide the following information.1) Pharmacy DEA2) Pharmacy Name/DBA3) Phone number4) Email5) Primary Contact First Name and Last Name6) Information about VM buyer and sign up link.If the zip code is from a state that is allowed for 3.0, then he following info should be collected. **1) "Pharmacy Information"** * NPI # (0123456789) ** NCPDP # (0123456) ** Legal Business Name ** Doing Business as (DBA) ** Pharmacy Address 1 ** Pharmacy Address 2* Pharmacy City ** Pharmacy State ** Pharmacy Zip Code * *** Click here if Mailing address same (checkbox) ** Mailing address 1 ** Mailing address 2 ** Mailing City ** Mailing State ** Mailing Zip Code** Pharmacy Phone ** Pharmacy Fax * **2) "Pharmacy Owner Information"** * Owner First Name ** Owner Last Name ** Mobile Number ** Email Address ** Email Address (Confirm) * **3) "Primary Contact Information"*** Click here if Primary Contact Information is same as owner (same set as above) ***If no - provide another primary contact info Primary contact = first FO User*4) "Pharmacy License Information"** * DEA # (AB1234567) ** State License Number ** State License Expiration Date (MM/DD/YYYY) ** Federal Tax Id # **{}**5) Tax Exempt Doc Example Form -* ability to upload the form. **6) ACH Form -** Ability to upload and the ability to sign the form electronically.**The BO user has to manually verify and approve the applicant.**
6	Only Pharmacies can be buyers (validated manually)The home page will be common for VM and 3.0. The hompage will be split vertical and one section will be dedicated for VM and the other for 3.0 with options to sign up.Two separate sign up pages (VM, 3.0) will be maintain in the website. VM sign up pageAre you a buyer or seller? If buyer is selected, the following fields should be displayed.If the pharmacy is already registered as an active member in 3.0 and logged into 3.0, then the following information is required to register as Buyer in VM.Required info* Tax Exempt Doc Example Form - ability to upload the form. BO user manual checks it and approves.* Promo code* How did you hear about us?* Referred by* Terms and Conditions **If the pharmacy is an active registered member of 3.0 and not logged into 3.0. When the user enters the NCDCP #, the user should be prompted to log into 3.0 and the above flow will be followed. The user will not have the ability to fill the form without logging into 3.0 if the NCDCP is an active registered member of 3.0 If the pharmacy is not an active registered member of 3.0, the following information is required.Required info** Tax Exempt Doc Example Form* If using ACH (optional) for buying, also: ACH authorization form signed and a voided check scan/photo1) "Pharmacy Information" * NPI # (0123456789) ** NCPDP # (0123456) ** Legal Business Name ** Doing Business as (DBA) ** Pharmacy Address 1 ** Pharmacy Address 2* Pharmacy City ** Pharmacy State ** Pharmacy Zip Code * * Click here if Mailing address same (checkbox) ** Mailing address 1 ** Mailing address 2 ** Mailing City ** Mailing State ** Mailing Zip Code** Pharmacy Phone ** Pharmacy Fax * 2) "Pharmacy Owner Information"* Owner First Name ** Owner Last Name ** Mobile Number ** Email Address ** Email Address (Confirm) **3) "Primary Contact Information"** Click here if Primary Contact Information is same as owner (same set as above) If no - provide another primary contact info Primary contact = first FO User4) "Pharmacy License Information"* DEA # (AB1234567) ** State License Number ** State License Expiration Date (MM/DD/YYYY) ** Federal Tax Id # **5) "Pharmacist Questionnaire" (not needed if not a Pharmacy)** Primary Wholesaler Name ** Secondary Wholesaler Name* Promo code* How did you hear about us?* Referred by* Terms and Conditions *

Flow Chart




or checks N/A?
Checks N/A
enters NCPDP #
2
Does the NCPDP # have any active applications?
Yes
No
3
Does the NCPDP # belong to a registered active MRX member?
Yes
AF 1.1
Login screen with message and user logs in
Both MRX 3.0 and VM buyer member
VM Buyer member in MRX 3.0 non operating state
All other members
AF 1.1c
AF 1.1b
Display message and redirect to VM Buy page
AF 1.1a
Follow US 4 for landing page rules
AF 1.2
System checks if the user is a 2.0 user logging into 3.0 for 1st time?
Yes
User enters information in Contacts Manager – Edit Contact – Scenario 3
No
AF 1.4
System displays registration page with fields pre-populated and non editable
AF 1.3
System validates the information?
AF 1.5
User agrees to T&C and clicks Submit
No
4
Check if NCPDP # is available in Prospective members table in SFDB
No
5
User selects state
Yes
6
System check if MRX 3.0 allowed in the state and display appropiate message
7
Display the fields for the user to enter
8
Pre-populate the fields (as available) and allow the user to edit
9
User enters the information in the fields and clicks Submit
10
Validate if all fields are filled?
No
Display error message
Yes
11
Store the information in the database and redirect the user to Page 2 - Financial Information
AF 2.1
User enters/uploads



| **Preconditions**|

Application: MatchRX Front office **Navigation**: User is in www.matchrx.com

Flow

Basic Flow:

1. The user enters the NCPDP # or selects the check box "N/A" (*DF_NCPDP & State_List)*. If user enters NCPDP# and clicks search icon, proceed to next step. Else skip to step 5.
2. The system checks if the NCPDP# entered has any active applications in process (status in *BR_Salesforce* is New, In process or Pending documents). If yes, display the message and end the process "*The NCPDP number entered has an active application in process.   If you have any questions, contact registration@matchrx.com or call (877) 590-0808".* If no, proceed.
3. The system checks if the entered NCPDP # belongs to a registered active MatchRX (VM or MRX 3.0 or both) member. If no, proceed, Else skip to Alternate Flow 1
4. The system checks if the NCPDP# is available in Prospective members table in Salesforce DB (*BR_DataQ_DB*). If yes, the location of pharmacy field is retrieved from Prospective members table in Salesforce DB and displayed for the user. The user will not be able to edit. Skip to step 6. If NCPDP # is not available in Prospective members table in Salesforce DB, then proceed to step 5.
5. The user has to select state from dropdown mentioned in *DF_NCPDP & State_List*
6. The system validates if MRX 3.0 registration is allowed in the selected state (*BR_State*List_).
7. The webpage should display all the fields mentioned in *DF_Full*Application_.
8. The system prepopulates the fields *(Pharmacy Information, Pharmacy Owner Information, Primary Contact Information* and *Pharmacy License Information)* as available from Prospective members table in Salesforce DB and enables all fields for user to edit (*BR_DataQ_DB*).
9. The user enters other empty fields. State & NCPDP # should be a non-editable field. The user clicks "Submit".
10. The system validates the fields. If all the fields entered are correct, proceed. Else repeat step 9.
11. The system stores the information in Salesforce database *(BR_Salesforce)* and redirects the user to Page 2 - financial information webpage *(BR_Financial_Information)* displaying all fields mentions in *DF_Financial*Information_. The system also sends the application number to the primary contact's email address (*BR_Email)*. If the user continues the application by providing financial information, skip to Alternate Flow 2. If not, process ends.

Alternate Flow 1:

1. The webpage should display the login fields with a message "The NCPDP number entered is a registered user of the MatchRX. Please login to continue". Once the user logs in and if the user is
   a. A registered active member of both MRX 3.0 and VM the user's landing page will be based on US 4 - Pharmacy Login and process ends.
   b. A registered active VM buyer member in a MRX 3.0 non-operating state, display the message *(BR_Registered_User)* and redirect the user to VM Buy page and process ends.
   c. If neither of the above, proceed to next step

2. If the user is a registered active member of MRX 2.0 who has never logged in to MRX 3.0 system, the system display the "US 6 - Pharmacy Menu - Contacts Manager - Edit Contact - Scenario 3 page" and the user enters the information. Else skip to step 4.
3. The system validates the information. If correct, proceed. Else repeat step 2.
4. The system displays the registration page with a message "You are an active member of '{MatchRX 3.0/VM Buyer }'. You are registering for '{VM Buyer/ MatchRX 3.0}'". The system prepopulates and disables edit for all the fields except Terms & condition check box (last field) in *DF_Full_Application.*
5. The user checks the terms and condition and clicks Submit. The user is shown the message *"Thank you for registering. Your application number is {----------}. Your account representative will contact you to complete your registration. If you have any questions, please reference your application number and contact registration@matchrx.com or call (877) 590-0808. We look forward to speaking with you shortly."* The system sends the application number to the primary contact's email address (*BR_Email)*and process ends.

Alternate Flow 2:

1. The user enters/uploads the documents mentioned in the financial information page (*DF_Financial_Information*).
2. The system validates the fields*.* If all the fields entered are correct, proceed. Else display error message and repeat step 1.
3. The system stores the financial information (*DF_Financial_Information)* in MMS database, provides a success message on the webpage (*BR_Success_Message)* and sends an email (*BR*Email_*)*.
4. The system updates the application record in Salesforce indicating that each document has been uploaded with date/timestamp *(BR_Salesforce)*
5. Process ends.

Data Fields

DF_NCPDP & State_List

Field Name	**Example**	**Data Type**	**Default Value**	**M/O/R***	**Control Type**	**Remarks**
NCPDP # (N/A)	N/A	N/A	Unchecked	One of the two NCPDP field is mandatory	Check box	Check box "N/A" will enable state list drop down for Location of pharmacy. Disable NCPDP field and skip the next row remarks if user checks N/A.
NCPDP # (0123456)	0123456	Numeric (min 6, max 7) or check box	Empty	One of the two NCPDP field is mandatory	Text box with check box	1. Validate if the NCPDP number is associated with any registered active MRX 3.0 member. If yes, notify user that the user is already registered and prompt user to login. 2. If above is not true, check the NCPDP number against the Prospective members table in Salesforce DB. If the system find matching data, prepopulate the certain fields as mentioned in "Default Value" column. The user should be able to edit prepopulated fields. 3. If the NCPDP number is not found in the Prospective members table in Salesforce DB, system should allow the user to proceed with default value for all the fields as empty.
Location of Pharmacy	Michigan	Alphabet	State / Prepopulated & disabled based on NCPDP #	M	Drop-down	All 50 US States + Washington DC

DF_Full_Application

Pharmacy Information

Field Name	**Example**	**Data Type**	**Default Value**	**M/O/R***	**Control Type**	**Remarks**
NPI # (0123456789)	0123456789	Numeric (min 10, max 10)	Empty	M	Text box	

Legal Business Name	XYZ Pharmacy LLC	Varchar (min 1, max 60)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	
Doing Business as (DBA)	ABC Pharmacy	Varchar (min 1, max 60)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	
Pharmacy Shipping Address 1	100 E Main St.	Varchar (min 1, max 55)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	~~Standardization of address through Fedex/USPS API~~
Pharmacy Shipping Address 2	Ste. 2A	Varchar (min 1, max 55)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	
Pharmacy Shipping City	Royal Oak	Varchar (min 1, max 30)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	
Pharmacy Shipping State	Michigan	Single line of text	Pre-selected and non-editable	R	Drop down	Populated from state selected in DF_NCPDP & State_List.
Pharmacy Shipping Zip Code	48201-1234	Numeric (5/9)	Empty or prepopulated (editable) based on NCPDP #.	M	Text box	
Pharmacy Phone	123-456-7890	Numeric (min 10, max 10)	Empty or prepopulated (editable) based on NCPDP #.	M	Text box	
Pharmacy Fax	987-654-3210	Numeric (min 10, max 10)	Empty or prepopulated (editable) based on NCPDP #.	M	Text box	
Click here if Pharmacy Mailing Information is same as Pharmacy Shipping Information	N/A	N/A	Unchecked	O	Check box	When user checks this box, the system should prepopulate all the below fields in this section with the Pharmacy shipping address information and allow user to edit. Unchecking and rechecking the box should again prepopulate all the below fields in this section with the Pharmacy shipping address information.
Pharmacy Mailing Address 1	100 E Main St.	Varchar (min 1, max 55)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	
Pharmacy Mailing Address 2	Ste. 2A	Varchar (min 1, max 55)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	
Pharmacy Mailing City	Royal Oak	Varchar (min 1, max 30)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	
Pharmacy Mailing State	Michigan	Single line of text	--Select— or prepopulated (editable) based on NCPDP #	M	Drop down	Dropdown list of all 50 US states

Pharmacy Mailing Zip Code	48201-1234	Numeric (min 5, max 9)	Empty or prepopulated (editable) based on NCPDP #.	M	Text box	

Pharmacy Owner Information

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
Owner First Name	John	Alpha + Symbols. No numbers (min 1, max 20)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	
Owner Last Name	Smith	Alpha + Symbols. No numbers (min 1, max 20)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	
Mobile Number	123-456-7890	Numeric (min 10, max 10)	Empty or prepopulated (editable) based on NCPDP #.	M	Text box	Format must be xxx-xxx-xxxx
Email Address	abc@xyz.com	Varchar (min 1, max 50)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	
Email Address (Confirm)	abc@xyz.com	Varchar (min 1, max 50)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	

Primary Contact Information

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
Click here if Primary Contact Information is same as owner	N/A	N/A	Unchecked	O	Check box	When user checks this box, the system should prepopulate all the below fields in this section with the Pharmacy owner information and allow user to edit. Unchecking and rechecking the box should again prepopulate all the fields
First Name	John	Alpha + Symbols. No numbers (min 1, max 20)	Empty or prepopulated (editable) based on section 2 information	M	Text box	
Last Name	Smith	Alpha + Symbols. No numbers (min 1, max 20)	Empty or prepopulated (editable) based on section 2 information	M	Text box	
Title/Position	Owner	Varchar (min 1, max 30)	Empty or prepopulated (editable) as Owner if first field in this section is checked	M	Text box	
Mobile Number	123-456-7890	Numeric (min 10, max 10)	Empty or prepopulated (editable) based on NCPDP #.	M	Text box	Format must be xxx-xxx-xxxx
Email Address	abc@xyz.com	Varchar (min 1, max 50)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	

Email Address (Confirm)	abc@xyz.com	Varchar (min 1, max 50)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	

Pharmacy License Information

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
DEA # (AB1234567)	AB1234567/A01234567	First characters has to be Alphabet. Next character is alphanumeric and last 7 characters has to be Numeric (min 9, max 10)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	
DEA Expiration Date (MM/DD/YYYY) *	12/30/2017	Numeric (min 8, max 8)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	Format should force the use of "/".
State License Number	ABC123XYZ789	Varchar (min 1, max 35)	Empty or prepopulated (editable) based on NCPDP #	M	Text box	
State License Expiration Date (MM/DD/YYYY) *	12/30/2017	Numeric (min 8, max 8)	Empty or prepopulated (editable) based on NCPDP #.	M	Text box	Format should force the use of "/".

Pharmacist Questionnaire

Field Name	Example	Data Type	Default Value	M/O/R*	Control Type	Remarks
Enterprise Type	Partnership Corporation Sole Proprietor LLC	Selection	Unselected	M	Radio buttons	
Primary Wholesaler Name	Cardinal Health	Selection	Select	M	Drop-down	If "Other", below field (mandatory) to type the name of the pharmacy
Other	ABC	varchar (min 1, max 50)	Empty	M if "other" option is selected above	Text box	
Secondary Wholesaler Name	ABC	varchar (min 1, max 50)	Empty	O	Text box	
Type Of Pharmacy	Closed Door Pharmacy	Selection	Select	M	Drop-down	

Pharmacy Software	QS/1	Dropdown	Select	M		Options in drop down Abacus AdvanceNet Health Solutions, Inc Apothesoft-Rx BestRx Pharmacy Solutions CarePoint Datascan Digital Rx EnterpriseRx by Mckesson FrameworkLTC FSI Pharmacy Management System Health Business Systems (HBS) Helix Pharmacy System Liberty Software Micro Merchant Systems, Inc New Leaf Rx by KeyCentrix QS/1 PDX Pharmacy System PharmacyRx - Mckesson Pharmaserv by McKesson PioneerRX PKonRx By SRS Pharmacy Systems PROscript 2000 by Prodigy Data Systems QuickScript by Cost Effective Computers Retail Management Solutions RS Software Rx3000 Outpatient Pharmacy Management System RxMaster Pharmacy Systems ScriptPro Speed Script and Speed Script LTC SuiteRx VIP Pharmacy Systems Visual Superscript by DDA Enterprises Inc WinRx by Computer-Rx Other (no need for a text box)

Referral

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
Promo Code	AB123@	Varchar (min 0, max 35)	Empty	O	Text box	
How did you hear about us?	Article	Selection	--Select—	O	Drop-down	
Referred by	ABC123@	varchar (min 0, max 35)	Empty	O	Text box	
Number of locations	5	Selection (-~~Select~~-, 1 -20+)	--Select—	O	Drop-down	

Terms and Conditions	N/A	N/A	Unchecked	M	Check box	• If the user is registering for VM buyer and MRX 3.0, then display "I accept the terms and conditions of the MatchRX 3.0 User Agreement and Vendor Marketplace User Agreement." • If the user is registering only for VM buyer, then display "I accept the terms and conditions of the Vendor Marketplace User Agreement." • If the user is registering for 3.0 and already a VM member, then display "I accept the terms and conditions of the MatchRX 3.0 User Agreement." User agreements should have links which should open in a new page when clicked by the user. If the user is a registered member and logged in, the system should determine the application that the member is registering for and follow the above rules.

DF_Financial_Information

Application Number

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
Application Number	123131	Numeric (min 6, max 6)	Empty/prepopulated	M	Text box	Prepopulated and edit disabled (in both scenarios, if user has just completed Page 1 or returning to page 2 using email link) The number has to be randomized. the format will be 1xxxxx
Name (Legal entity)	XYZ Pharmacy LLC	Varchar (min 1, max 60)	Prepopulate and non-editable	M	Text box	
DBA	ABC Pharmacy	Varchar (min 1, max 60)	Prepopulate and non-editable	M	Text box	
Pharmacy Shipping Address 1	100 E Main St.	Varchar (min 1, max 55)	Prepopulate and non-editable	M	Text box	
Pharmacy Shipping Address 2	Ste 2A	Varchar (min 1, max 55)	Prepopulate and non-editable	M	Text box	
Pharmacy Shipping City	Royal Oak	Varchar (min 1, max 30)	Prepopulate and non-editable	M	Text box	
Pharmacy Shipping State	Michigan	Varchar (min 1, max 30)	Prepopulate and non-editable	M	Text box	
Pharmacy Shipping Zip	48201-1234	Numeric (min 5, max 9)	Prepopulate and non-editable	M	Text box	
Pharmacy Phone	123-456-7890	Numeric (min 10, max 10)	Prepopulate and non-editable	M	Text box	
Email Address	abc@xyz.com	Varchar (min 1, max 50)	Prepopulate and non-editable	M	Text box	

The user should fill at least one of the following sections and may choose to fill more than one section. Once a section is filled, it is mandatory to fill the section completely unless specified in remarks

ACH Info section

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
Text: I hereby authorize MRX Holdings LLC to initiate the entries to my accounts in relation to transactions I execute on MRX Holdings LLC at no cost. I acknowledge that I possess the authority to request the origination of automated clearing house (ACH) transactions to the account described below and the origination complies with the provisions of U.S. law. Transactions dishonored by the Receiving Depository Financial Institution and returned to MRX Holdings LLC will be subject to a processing fee. This authority is to remain in full force and effect until MRX Holdings LLC has received written notification from me of its termination in such time and in such a manner as to afford MRX Holdings LLC a reasonable opportunity to act on it.						

Account Number	1234567	Numeric (min 4, max 20)	Empty	M	Text box	
Confirm Account Number	1234567	Numeric (min 4, max 20)	Empty	M	Text box	
Routing Number	123456789	Numeric (min 9, max 9)	Empty	M	Text box	
Financial Institution	Chase	Alpha numeric (min 1, max 50)	Prepopulate but editable	M	Text box	Prepopulate using ABA API (https://routingnumber.aba.com/default1.aspx)
Account Type	Checking	Checking/Savings	Empty	M	Radio button	
Upload ACH form	N/A	PDF/ jpeg	Empty	O/M	File Upload	File to download empty ACH form with fields prepopulated (refer above section). Upload File size restriction: 3 MB. The user can upload ACH form or use e-sign or both but atleast one is mandatory if any field in this section is filled.
E-Signature	John Smith	Varchar (min 2, max 51)	Empty	O/M	Text box	TERMS OF ACCEPTANCE and SIGNATURE I, [Applicant's name], am authorized to approve the banking information and warrant the truthfulness of the information provided in this application. Electronic Signature: * Please type your First and Last Name I understand that checking this box constitutes a legal signature confirming that I acknowledge and agree to the above Terms of Acceptance.
Date	12-31-2017	Numeric	Empty	M	Calendar/text box	

Check section

Field Name	Example	Data Type	Default Value	M/O/R*	Control Type	Remarks
Upload voided check	N/A	PDF/image	Empty	O	File Upload	Upload File size restriction: 3 MB

Tax exempt form section

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
Upload Tax exempt form	N/A	PDF/ jpeg	Empty	O	File Upload	File to download empty tax exempt form. Upload File size restriction: 3 MB Sample file: Uniform-Sales-and-Use-Certificate-5-2016 a.pdf

M – Mandatory O – Optional R – Read only

Business Rules

BR_State_List

The attached file has the list of MatchRX 3.0 operating states.

If the user's NCPDP number returns a state in which MRX 3.0 operate, the user is registered for both MRX 3.0 and VM buyer. Display the below message for the user.
"You are registering for both MatchRX 3.0 and the Vendor Marketplace"

If the user's NCPDP number returns a state in which MRX 3.0 doesn't operate, the user is registered only for VM buyer. Display the below message.
"You are registering for the Vendor Marketplace. Unfortunately MatchRX 3.0 is not available within your state. Your state board of pharmacy does not currently permit interstate pharmacy-to-pharmacy transactions.
Should you have any questions about MatchRX 3.0, please contact info@matchrx.com or call (877) 590-0808."

BR_DataQ_DB

This is a prospective members table stored in Saleforce DB. This table has pharmacy information. The table is updated through MatchRX DB which is updated using the DataQ table stored in the MRX server. The DataQ table in MRX server is updated with a FTP file from DataQ which is out of scope for HTC
Data field format can be found in the below file starting from section 6.1

BR_Success_Message

After submitting forms by choosing e-sign or upload on page 2 – financial information page:
"Thank you for submitting your financial information. Your account representative will contact you once your registration has been verified, typically within 2 business days after all forms have been received. If you have any questions regarding your registration, please reference your application number "{application number}" and contact registration@matchrx.com or call (877) 590-0808. We look forward to welcoming you as a new MatchRX member!"

BR_Registered_User

If the user is a registered active member of VM only and is located in a MRX 3.0 non-operating state, the webpage should display the message "*Unfortunately MatchRX 3.0 is not available within your state. Your state board of pharmacy does not currently permit interstate pharmacy-to-pharmacy transactions.*
Should you have any questions about MatchRX 3.0, please contact info@matchrx.com or call (877) 590-0808."
and the user is redirected to the VM Buy page.

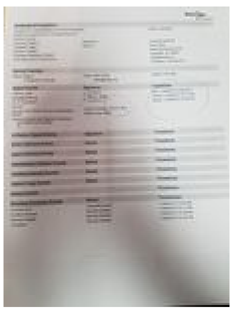
BR_Financial_Information

Display the below message on the top of the page *"Thank you for registering. Your application number is {----------}. Please reference this number when contacting MatchRX. Our compliance team will validate the information provided and contact you with any questions. Verification ensures all MatchRX members are licensed independent pharmacies in good standing.*

To complete your registration, please provide a signed ACH form, Sales tax exempt form and photocopy/image of a bank check (starter checks are not accepted). Choose one of the methods below to submit the documents:"
The webpage should have the sections mentioned in *DF_Financial_Information*

Followed by below
" *If you have any questions, please reference your application number and contact registration@matchrx.com or call (877) 590-0808*"

When a user e-signs, the information in the attached picture should be captured.



BR_Email

These templates will reside in Salesforce. Template development is out of scope for HTC. Below is for information purpose only.

Email 1 - After a non MRX user submits page 1 of the registration:
Dear "Pharmacy Name"
Thank you for registering with MatchRX. Your application number is {-------}. Please reference this number when contacting MatchRX regarding the status of your registration. Our compliance team will validate the information and contact you with any questions. Verification ensures all MatchRX members are licensed independent pharmacies in good standing.
To complete your registration, please click here to submit {link to page 2 of application} a signed ACH form, photocopy/image of a bank check (starter checks are not accepted), and a signed sales tax exempt form.
If you have any questions regarding your registration, please contact registration@matchrx.com or call (877) 590-0808.
Thank you.
The MatchRX Team

Email 2 - After a non MRX member e-signs or uploads a financial document:
Dear "Pharmacy Name"
Thanks for uploading the document. We now have your {ACH form / voided check / sales tax exempt form}. Your account representative will contact you once your registration has been verified, typically within 2 business days after all forms have been received. If you have any questions regarding your registration, please reference your application number {application number} and contact registration@matchrx.com or call (877) 590-0808.
We look forward to welcoming you as a new MatchRX member!
Thank you.
The MatchRX Team

Email 3 - After a registered MRX member submits page 1 of the registration:
Dear "Pharmacy Name"
Thank you for registering with MatchRX. Your application number is {-------}. Please reference this number when contacting MatchRX regarding the status of your registration. Our compliance team will validate the information and contact you with any questions. Verification ensures all MatchRX members are licensed independent pharmacies in good standing.
If you have any questions regarding your registration, please contact registration@matchrx.com or call (877) 590-0808.
Thank you.
The MatchRX Team

BR_Salesforce

Below are the high level statuses that a Back office user might need. We will have a finalized list of status and rules in the Prospect Object user story.

Status	Trigger and rules
Prospect	Default status before a registration starts
New	Once the user submit page 1 of the registration, the application status column of the pharmacy record in prospective member database stored in Salesforce should be updated to "New". The data from the registration form should also be inserted in the prospective member database stored in Salesforce (let's call it user-entered data). Salesforce should never update the DataQ fields (Updating the status to "New" is in scope for HTC). Whenever a document (ACH/Tax form/Cheque) is uploaded by Front office user or back office user, salesforce should update the record with the document uploaded and time stamp it. (In scope for HTC). Back office user should be able to view both user entered data and DataQ data in salesforce (In scope for HTC).
In process	Once the registration application is assigned by the sales manager to a sales rep, the status will be changed to "in process". During the "in process" status, the registration is verified by the compliance team for ownership and licensing.
Pending financial documents	Once verified, the status changes to "pending financial documents" until all documents are received and approved. (Out of Scope for HTC)
Rejected	If a BO user wants to reject an application.
Canceled	If the applicant wants to cancel the application, the BO user set the status as canceled on the applicant's behalf
Approved	Once a back office user changes the status to "Approved", link to create login credentials are sent, and a hard copy welcome letter will automatically be generated (two templates developed by MRX – MRX3.0/VM and VM only). Only when an application is approved as a member and the link to create login credentials sent, the user entered data has to be copied to MatchRX database.

Assumption:

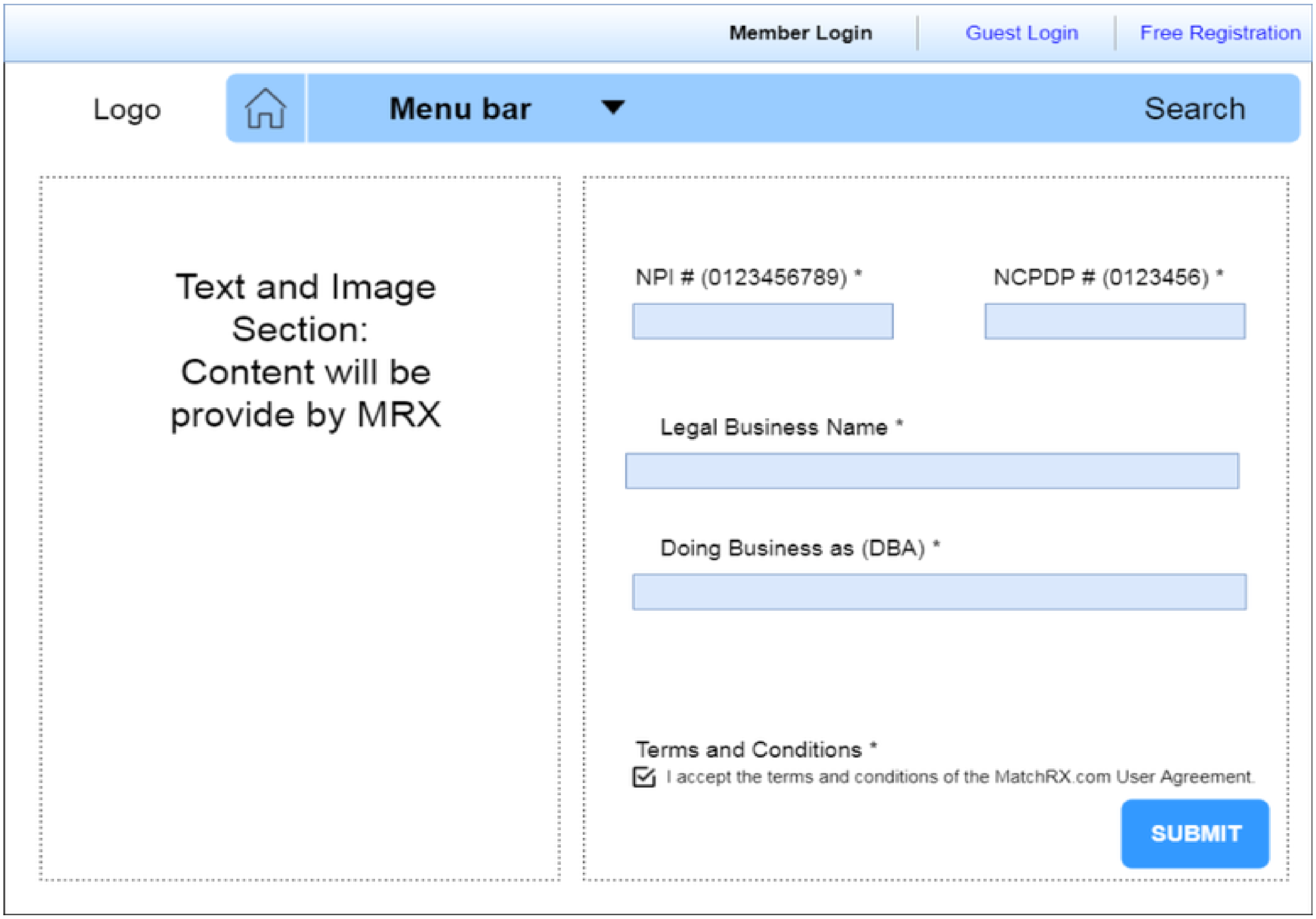
The registration page will have a text and images on left side of the page. The text and images will be provided by MatchRX.

Acceptance Criteria

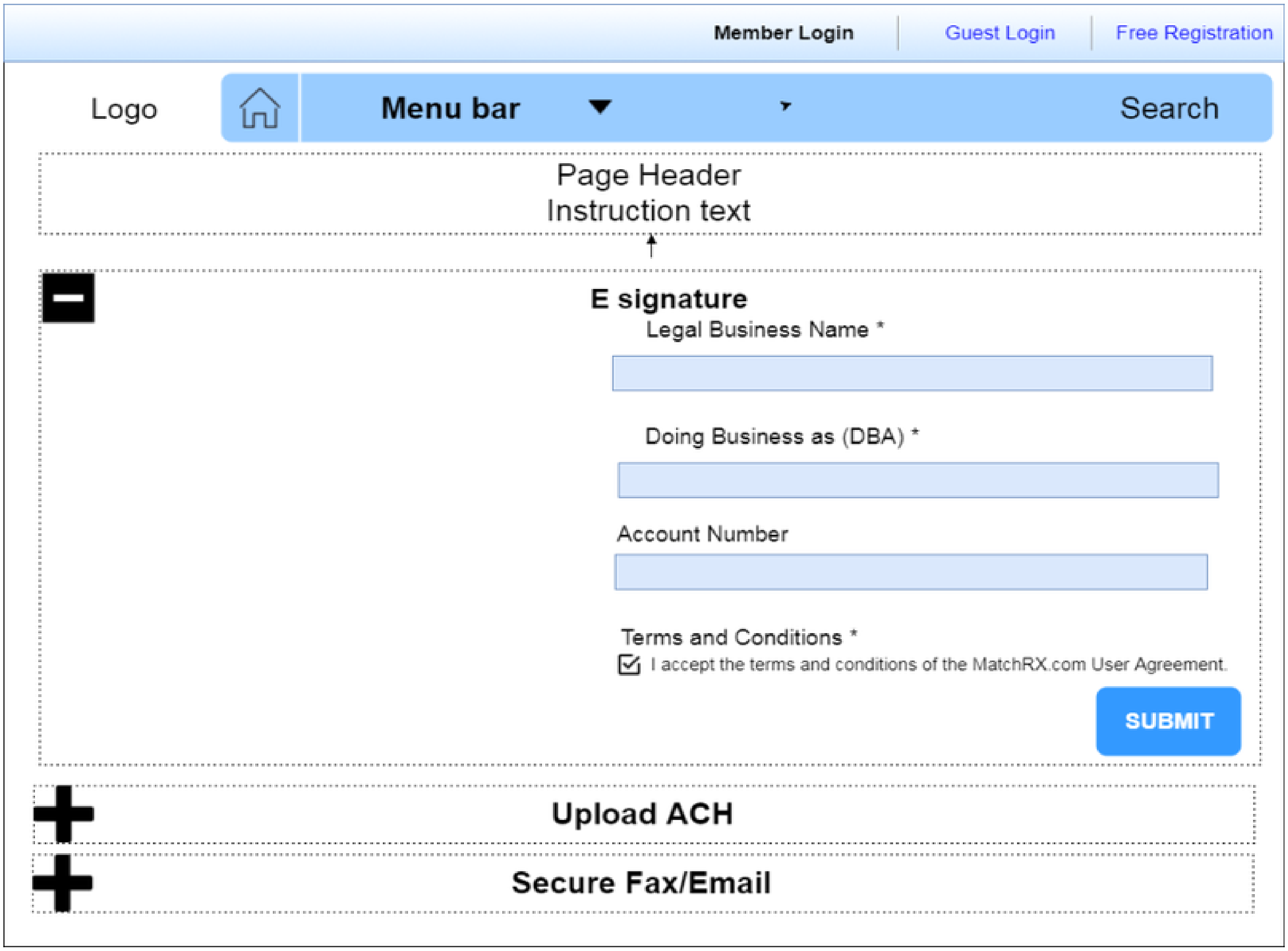
1. The following types of users are able to successfully provide information for registration per the flow mentioned
    a. New MatchRX user in operating state
    b. VM Buyer with ACH on MRX file
    c. VM Buyer without ACH on MRX file
    d. Returning user with application number
    e. MRX 2.0 user without sales tax exempt form.
    The information is also successfully stored in the SalesForce database with the status as "New"
2. The system sends an email with application number when
    a. A new user submits Page 1 of registration
    b. A VM buyer tries to register.
3. A user is able to download Pre-populated ACH form and upload the pdf/image on Page 2 of registration
4. User can upload documents
5. User completes electronic ACH form with e-signature.

Screen Reference

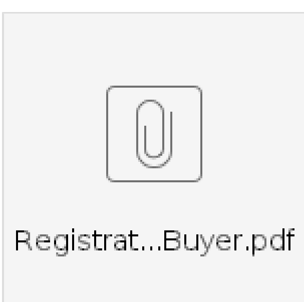
Page 1



Page 2: Three expand and collapse sections



Wire-frame



Test Data Requirement

1. Prospective member table in SF DB with NCPDP # and other fields to pre-populate the fields in the registration form.
2. Registered member table in MRX DB to validate if the NCPDP is a registered active member.
3. MRX 3.0 allowed state list table
4. MMS API to accept documents

US 3 - Guest Login

WBS #	
	<table><tr><th>Key</th><th>Summary</th><th>Updated</th><th>Due</th><th>Assignee</th><th>Status</th><th>Resolution</th><th>Sprint</th></tr><tr><td>MHX-164</td><td>WBS 7: PHP VM Promo-Guest Login [Show what's in stock for VM Marketplace]</td><td>Feb 17, 2018 14:35</td><td></td><td>Divyalakshmi</td><td>CLOSED</td><td>Unresolved</td><td>Sprint 3</td></tr><tr><td>MHX-68</td><td>WBS 218: BO - Guest login monitoring</td><td>Jan 03, 2018 22:03</td><td></td><td>Swapna.Patnaikuni</td><td>CLOSED</td><td>Unresolved</td><td>Sprint 2</td></tr><tr><td>MHX-67</td><td>WBS 9: Send guest login data to DB so BO users could track #NCPDP as prospect.</td><td>Dec 26, 2017 16:50</td><td></td><td>V</td><td>CLOSED</td><td>Unresolved</td><td>Sprint 2</td></tr><tr><td>MHX-66</td><td>WBS 8: 3.0 Guest log-in (NCPDP#) to see what's in stock for 3.0 Marketplace</td><td>Dec 26, 2017 16:50</td><td></td><td>V</td><td>CLOSED</td><td>Unresolved</td><td>Sprint 2</td></tr></table> 4 issues
Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story:

Front office
As MatchRx.com website, I want to let users login as guest and experience limited features of the website so that they can know more about the website.

End Objective:	To let users experience the website by providing basic information (MRX 3.0 and VM buyers)
User/Actor:	Guest users of MatchRx.com website
Program Type:	Guest login Screen for MRX 3.0 and VM buyer
Trigger:	Click on "Guest Login" link in the homepage
Related User Story:	MRX 3.0 – Buy page, Item details, Search VM – Buy page, Item Details, Search, Add to cart, Check out
Related WBS #:	7-9

Back office
As MRX back office user, I want to view the list of guest login users so that I can contact them.
Refer to *BR_Back Office* for more information

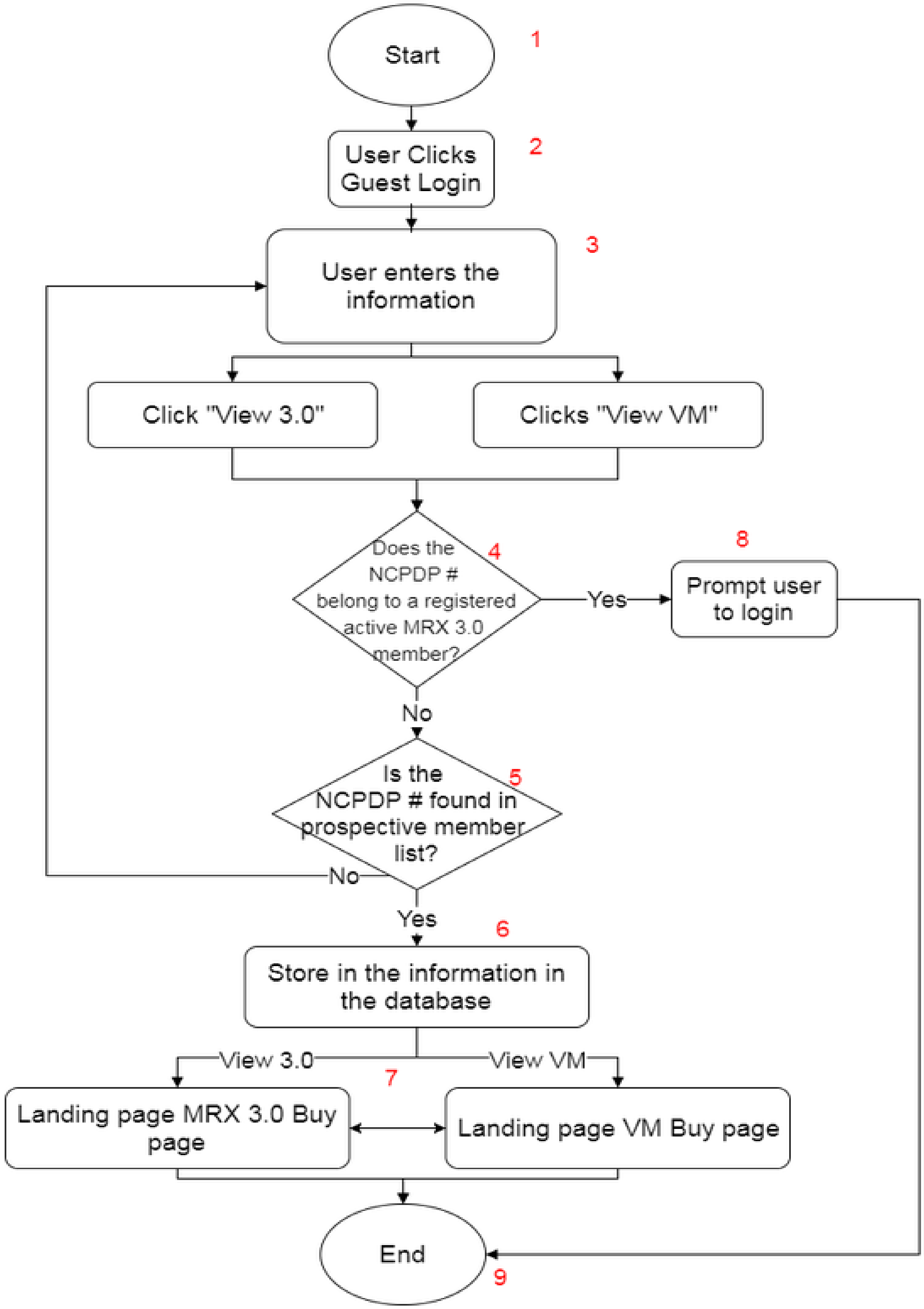
End Objective:	To have a widget which will display the guest login user information
User/Actor:	Back office user of MRX
Program Type:	Salesforce Widget
Trigger:	
Related User Story:	
Related WBS #:	218

Related WBS Description:

7	Without an ability to checkout, a guest user should be able to see Items catalogue, categories and item details. The guest can add to cart. Save the items in the cart based on cookie. The guest user cannot add to wishlist or checkout.
8	Without an ability to checkout, Items catalogue, categories and item details must be displayed. Only buy page and quick search should be activate. Guest user should have the ability to filter and sort buy page posting like a registered user. No wishlist, no sell page, no manage page, no order page, no checkout.User must use guest login to view marketplace without a membership.For 3.0 only, Guest will need to enter the following to log in as a guest. - NCPDP- Full Name- Phone number- Pharmacy NameIf the NCPDP entered through Guest Login is a registered member of MatchRx, prompt to log in.
9	Send guest login data to DB so BO users could track #NCPDP as prospect.- NCPDP- Full Name- Phone number- Pharmacy Name
218	List with following fields- Date / time (date & time);- NCPDP- Full Name- Phone number- Pharmacy Name- IP;Filter:Date range

Flow Chart

Guest Login



`* - Correction to step 4 - "Does the NCPDP # belong to a register MRX 3.0/VM Buyer member?"

Preconditions

Application: MatchRX website
Navigation: User is in MRX static pages and not logged in.

Guest Login

1. Process starts
2. The user clicks "Guest login"
3. A dropdown appears with the fields mentioned in *4.0 Data Fields and two buttons "View 3.0" and "View VM".* The user enters the information and clicks one of the buttons.
4. The system checks if the NCPDP # entered is associated with any registered ~~active~~ member of MRX 3.0 or VM. If no, proceed. Else skip to step 8
5. The system checks if the NCPDP # entered is available in the prospective members list maintain in Salesforce database with any status other than approved/Converted status. If yes, proceed. Else skip to step 2 with (*BR_Error Message*).
6. The system stores the information in the database.
7. If the user clicked "View 3.0" in Step 3, then the landing page should be MRX 3.0 Buy page. If the user clicked "View VM" in Step 3, then the landing page should be VM Buy page. The user will have accesses as mentioned in *BR_MRX 3.0 & BR_Vendor Marketplace* and will be able to switch between MRX 3.0 and VM
8. The system should prompt the user to login with a message that the user is already a registered member.
9. Process ends

Data Fields

Fields are same for MRX 3.0 and VM buyer

Field Name	Example	Data Type	Default Value	M/O/R*	Control Type	Remarks
NCPDP # (0123456)	0123456	Numeric (min 6, max 7)	Empty	M	Text box	

Business Rules

The guest users will be able to access the below features

BR_MRX 3.0

A guest user of MRX 3.0 have the following functionalities as same as a registered user

1. Ability to Quick search and Advanced search
2. Ability to view "Buy" Page
3. Ability to view "Item details"

A guest user of MRX 3.0 will not have the following functionalities. If the user tries to use one of the above functionalities, the user will be prompted to register with a button to register which will redirect the user to the registration page.

1. Ability to add item to wish list
2. Ability to add item to cart
3. Ability to view wish list
4. Ability to view cart and checkout
5. Ability to view "My Pharmacy" page (Account/Profile page)
6. Ability to view "Order" page
7. Any functionality related to selling

A guest user of MRX 3.0 will not have the following functionalities. The fields should be greyed out and disabled.

1. On "Buy page", "CSV export", "My previous purchase" and "My wishlist items"

MatchRx will maintain a prospective members list in the Salesforce Database (Out of scope for HTC) which has to be updated by the system when a guest user logs in (In scope for HTC). The primary key to match the data is NCPDP#.

BR_Vendor Marketplace

A guest user of Vendor marketplace has all the functionality of a registered VM buyer except as follows:

1. The user cannot add an item to the wish list.
2. When the user clicks on "Wishlist" page or "Orders" page, the user will be prompted to register with a button to register which will redirect

the user to the registration page.

3. ~~The user will be able to add items to the cart. The item will NOT be reserved for the guest user and it will be available in the marketplace for other buyers. When the user clicks checkout, the user will be prompted to register with a button to register which will redirect the user to the registration page.~~ When an user adds an item to the cart, the user will be prompted to register with a button to register which will redirect the user to the registration page.
4. The user will not have the ability to view "My Pharmacy" page (Account/Profile page)

A guest user of Vendor marketplace will not have any functionality of a registered VM seller. If the guest user adds item to the cart and closes the browser or logouts, the system should log out the guest user ~~and clear the cart.~~ (Not applicable as users cannot add to cart)
MatchRX will maintain a prospective members list in the Salesforce Database (Out of scope for HTC) which has to be updated by the system when a guest user logs in (In scope for HTC). The primary key to match the data is NCPDP#.

BR_Error Message

The system should validate NCPDP# against the DataQ database maintained by MRX. If it is not found, system should display the following error message.
Please try again or call the customer service team at 877-590-0808.

BR_Back Office

Sales-force should have a page and widget to display the guest login members to the back office users. The data has to be retrieved from the prospective members list maintained by the MatchRX in the Sales-force Database (Out of scope for HTC). This database is updated by the system when a guest user logs in (In scope for HTC). The page and the widget should have the following fields with ability to sort and filter.

1. NCPDP # (0123456)
2. Full Name
3. Phone Number
4. Pharmacy Name
5. Date of login
6. IP address
7. Two columns – MRX 3.0 and VM to highlight which system the guest user logged in.
8. Notes – ability to view and add notes (The MRX prospective list already has a field for notes. Sales-force has to update that field).

The widget will display few records, can be resized and should link to the page if the user wants to view the full list of record.

When a NCPDP # logins in multiple times as guest login, record each instance and display only once per day (latest login) on the widget.

Back Office User Access Rules

Feature/User Role	Admin	Accountant	IT	CSR Lead	CSR Team	Sales Manager	Sales Team	Compliance Manager	Marketing	Member Trainer
Guest Login - Page visibility	RE	None	None	None	None	RE	None	None	None	None
Guest Login - Widget visibility	R	None	None	None	None	R	None	None	None	None
NCPDP #	R	None	None	None	None	R	None	None	None	None
Full Name	R	None	None	None	None	R	None	None	None	None
Phone Number	R	None	None	None	None	R	None	None	None	None
Pharmacy Name	R	None	None	None	None	R	None	None	None	None
Date of login	R	None	None	None	None	R	None	None	None	None
IP address	R	None	None	None	None	R	None	None	None	None
Two columns – MRX 3.0 and VM	R	None	None	None	None	R	None	None	None	None
Notes	CR	None	None	None	None	CR	None	None	None	None

C - Create R - Read U - Update D - Delete E - Export None - Not visible

Acceptance Criteria

MRX 3.0

1. Ability to log in as guest user when providing correct information per Data_fields and

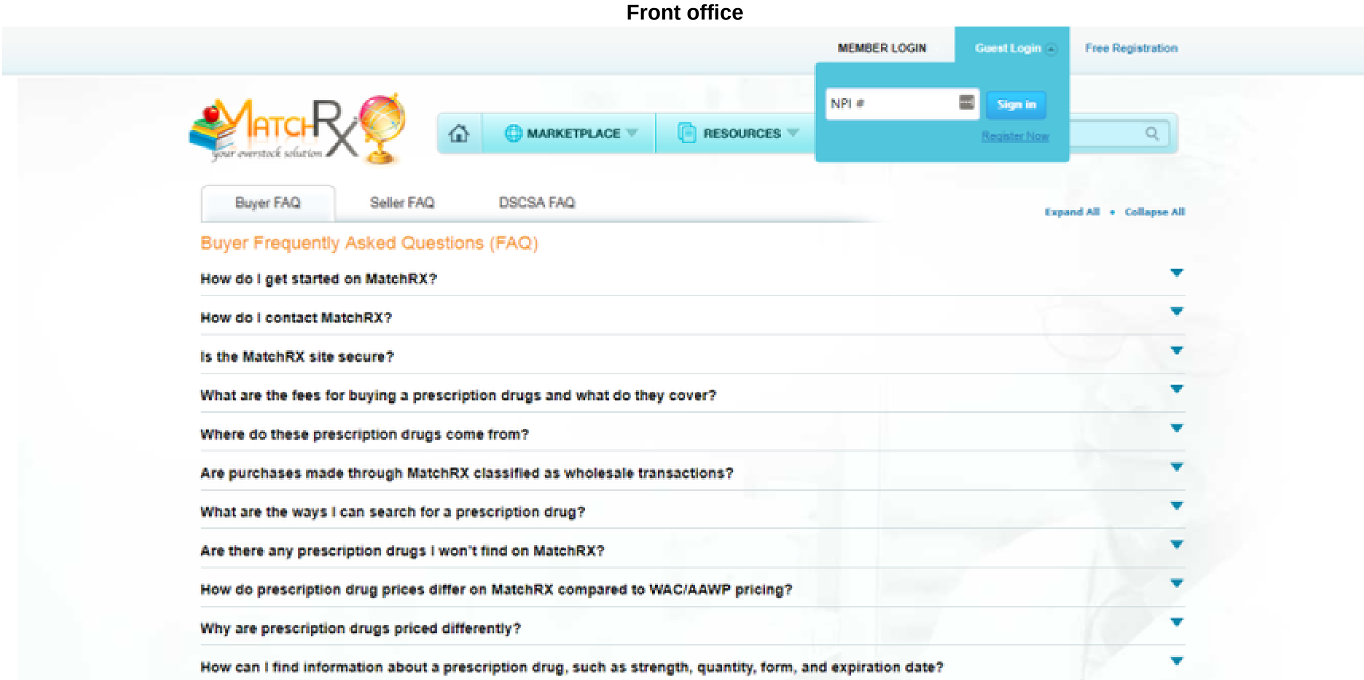
    a. valid non registered NCPDP # found in DataQ database
    b. NCPDP # associated with a registered non - active MRX 3.0 or VM buyer
2. Prompted to log in when providing correct information per Data_fields and NCPDP # associated with a registered active MRX 3.0 or VM buyer
3. When logged in MRX 3.0 as guest user, ability to use
    a. Quick search and Advanced search
    b. "Buy" Page except "My previous purchase and "Items in my wishlist"
    c. "Item details"
4. When logged in MRX 3.0 as guest user, the user is prompted to register, when the following is clicked
    a. add item to wish list
    b. add item to cart
    c. view wish list
    d. view cart and checkout
    e. "My Pharmacy" page (Account/Profile page)
    f. "Order" page
    g. "Sell" Page
5. When logged in VM as guest user, the user will have the ability to add items to the cart and Prompted to register, when the following is clicked\
    a. Add an item to the wish list.
    b. "Wishlist" page or "Orders" page
    c. checkout
    d. "My Pharmacy" page (Account/Profile page)

Back office:
The page and the widget should have all the 8 fields mentioned in BR_Back office. The Back office user should be able to filter and sort based on the fields.

Screen Prototype

Guest login drop down will be part of the all static pages when not logged in. After guest login, "Guest login" should changes to "Hi Guest"

Front office



Wire-frame

Test Data Requirement

1. Guest login table to store and update guest login information

US 4 - Single Sign on

WBS #

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-515	CLONE - WBS 12: User access check	Apr 19, 2018 08:25		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	
MHX-470	WBS 10: PHP Single Sign-on - Log-In as registered Member user_ CLONE	Jan 16, 2018 10:17		Divyalakshmi	IN STAGING	Unresolved	Sprint 3
MHX-58	WBS 13: Forgot Password	Dec 26, 2017 16:49		V	CLOSED	Unresolved	Sprint 2
MHX-57	WBS 14: Login MatchRX 3.0	Jan 04, 2018 22:47		V	CLOSED	Unresolved	Sprint 2
MHX-56	WBS 10: Single Sign-on - Log-In as registered Member user	Dec 26, 2017 16:49		V	CLOSED	Unresolved	Sprint 2
MHX-18	WBS 70: Login	Dec 26, 2017 16:45		V	CLOSED	Unresolved	Sprint 2
MHX-17	WBS 12: DB Design for User access check	Dec 26, 2017 16:44		V	CLOSED	Unresolved	Sprint 2
MHX-16	WBS 11: One user credentials to be used for all MRX products (FO + VM FO + Mobile)	Dec 26, 2017 16:44		V	CLOSED	Unresolved	Sprint 2

8 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered user of MatchRx.com website, I want the ability to login and choose/switch between applications so that I can use all the applications with same login credentials

End Objective:	To provide a system for the registered users to enter their login credentials and choose/switch the applications they want to use.
User/Actor:	All registered active users of MatchRx.com website
Application:	MRX 3.0 and VM
Trigger:	Click on "Member login" link on the homepage
Related User Story:	1
Related WBS #:	10-14, 70

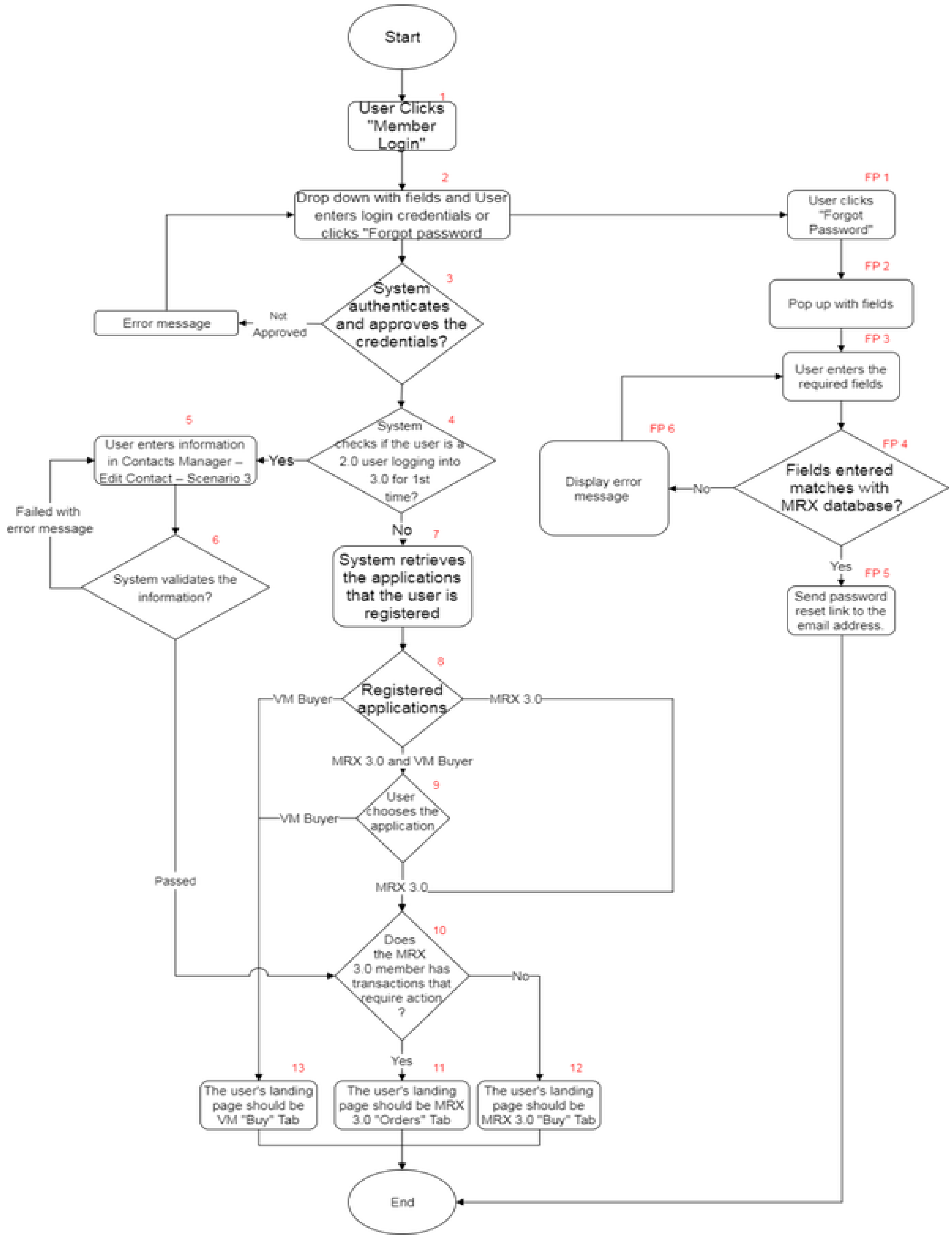
Related WBS Description:

10	Single Sign On.After login,Scenario 1:If corresponding business entity is registered in both systems 3.0 and VM Buyer, user should be given the option to choose between 3.0 and VM page.1) If the user chooses 3.0 and if they have transactions which require action, the landing page will be the Orders tab. If no open transactions, landing page will be buy page. User can easily switch to VM by clicking the VM logo on top left of the page.2) If member chooses to login as VM Buyer, the member is taken to the Buy tab.Scenario 2:If the member is a VM Vendor, the member is taken to the Orders tab.Scenario 3:If the member is registered with VM buyer only, landing page is VM Buy Tab.Scenario 4: If the members is registered with 3.0 only and if they have open transactions, the landind page will be the Orders tab. If no open transactions, landing page will be buy page.
11	Same user credentials should provide the access for that product (if registered with that product).If user is logged in already - there should not be log-out required to go to another product as long as the user has access (when switching 3.0 FO to VM FO or opposite)When user changes a PW, it should change for all MRX products.
12	Each registered business entity can have more that 1 user to log-in to front office. Users of corresponding entity will have equal rights except user management and payment section (for VM buyer). Primary contact (Primary User) can add/edit user information of all users and payment section. Other users (Secondary User) can only edit their personal user information and cannot edit payment section.
13	The link for a member to recover their password (token on email so user can reset his password)

14	Single Sign On.Login parameters:DEA #:email address:Password:After login,Scenario 1:If corresponding business entity is registered in both systems 3.0 and VM Buyer, user should be given the option to choose between 3.0 and VM page.1) If the Landing page is 3.0 and If they have transactions requiring action, it will be the Orders tab. If no open transactions, buy page. User can easily switch to VM by clicking the VM logo on top left of the page.2) If member chooses to login as VM Buyer, the member is taken to the Buy tab.Scenario 2: If the members is registered with 3.0 only and if they have open transactions, the landind page will be the Orders tab. If no open transactions, landing page will be buy page.
70	Single Sign On.Login parameters:DEA # (only for buyers):email address:Password:After login,Scenario 1:If corresponding business entity is registered in both systems 3.0 and VM Buyer, user should be given the option to choose between 3.0 and VM page.1) If the user chooses 3.0 and if they have transactions requiring action, the landing page will be the Orders tab. If no open transactions, landing page will be buy page. User can easily switch to VM by clicking the VM logo on top left of the page.2) If member chooses to login as VM Buyer, the member is taken to the Buy tab.Scenario 2:If the member is a VM Vendor, the member is taken to the Orders tab.Scenario 3:If the member is registered with VM buyer only, landing page is VM Buy Tab.

Flow Chart

Pharmacy Login



Preconditions
Application: MatchRX 3.0 and VM **Navigation**: User is in www.matchrx.com **User Status:** Registered and Active MRX 3.0 or VM buyer user

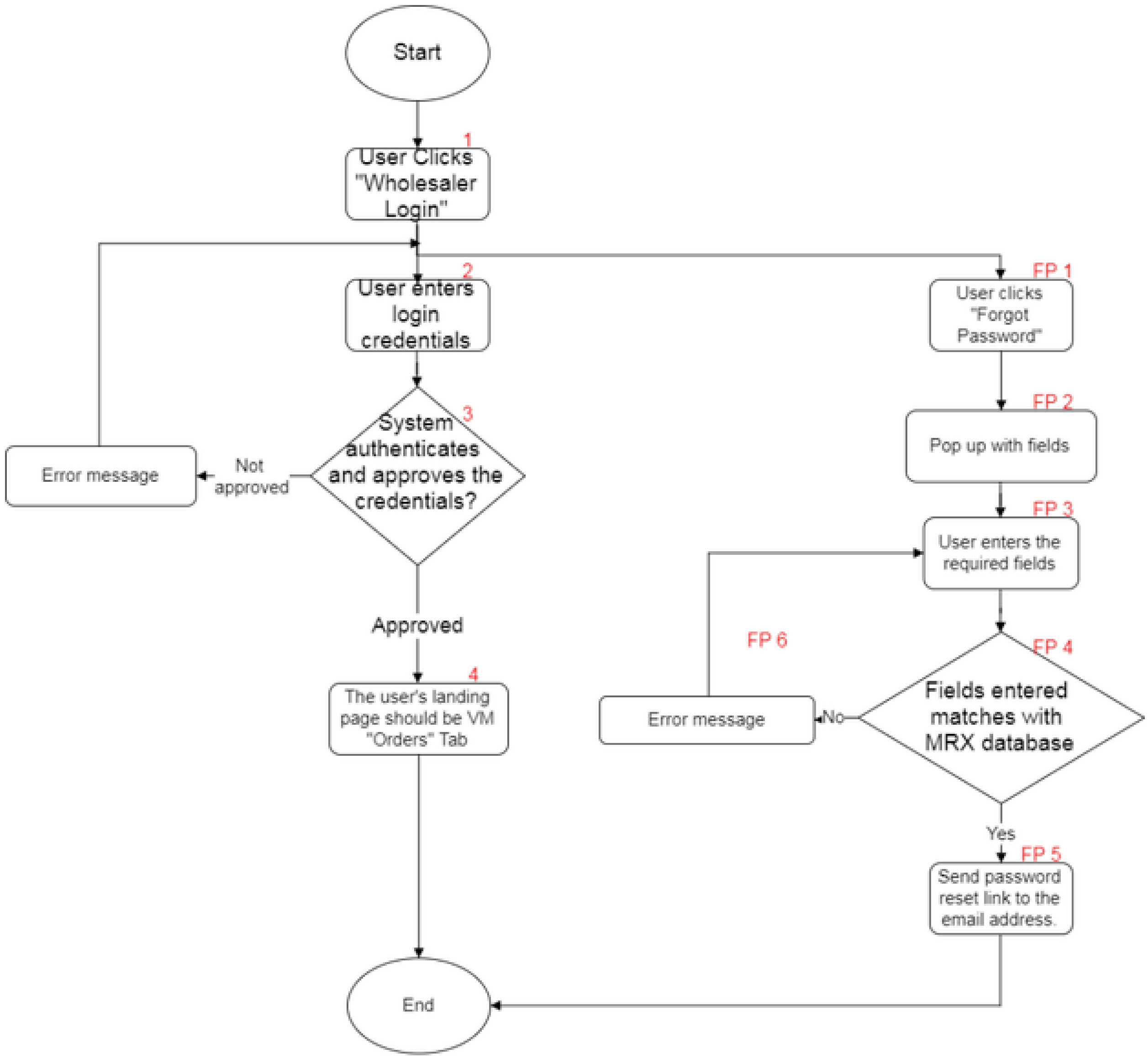
Pharmacy Login Flow:

1. The user click "Member Login".
2. The webpage displays a dropdown with the fields mentioned in DF_Pharmacy Login with the message (BR_MRX 2.0 User Transition) and the link "Forgot Password". If the user clicks "Forgot password", skip to Pharmacy Forgot Password flow. Else the users enters the information and clicks "Submit" which proceeds to next step.
3. The system checks in MRX DB if the information provided has access to MRX 3.0 or VM Buyer application (Category 1 - BR_Account Status). If the user doesn't have access to both MRX 3.0 and VM Buyer (Category 2&3 - BR_Account Status), then the user is shown the error message (BR_Error Message) and goes back to Step 2. Else proceed to next step.
4. The system checks if the user is a MRX 2.0 user and logging in for the first time in 3.0 (irrespective of whether it is web or mobile). If yes, proceed. Else skip to step 7
5. The system display the "US 6 - Pharmacy Menu - Contacts Manager - Edit Contact - Scenario 3 page" and the user enters the information.
6. The system validates the information. If correct, skip to step 10. Else repeat step 5.
7. The system retrieves the list of applications that the user has access (Category 1 - BR_Account Status)
8. If the user has access to:
   a. MRX 3.0 and VM, then proceed to next step.
   b. MRX 3.0 only, then proceed to step 10.
   c. VM buyer only, then proceed to step 13.
9. The webpage requests the user to choose between MRX 3.0 and VM. If the user click MRX 3.0, proceed to next step. Else skip to step 13
10. The system checks if the user has any transaction that requires action from the user (BR_Transactions requiring action). If yes, proceed to next step. Else skip to step 12.
11. The system should redirect the user to MRX 3.0 "Orders" page and the flow ends.
12. The system should redirect the user to MRX 3.0 "Buy" page and the flow ends.
13. The system should redirect the user to VM "Buy" page and the flow ends.

Pharmacy Forgot Password flow:

1. The user clicks on "Forgot Password"
2. The user is shown a popup in the middle of the page with the field mentioned in DF_Pharmacy Forgot Password.
3. The user enters the information.
4. The systems checks if the information provided has access to any of the MRX application (Category 1 - BR_Account Status). If yes, proceed to next step. Else skip to step 6.
5. The system will send a link to the email address to reset the password BR_Forgot Password and also display the message "The link to reset your password has been sent to {email address of the user}". The flow ends.
6. The system displays an error message that the information provided is incorrect BR_Error Message and the user has to re-enter the information. Repeat from Step 3.

Vendor Login



Preconditions
Application: VM **Navigation**: User is in www.matchrx.com **User Status:** Registered and Active VM Vendor user

Vendor Login Flow:

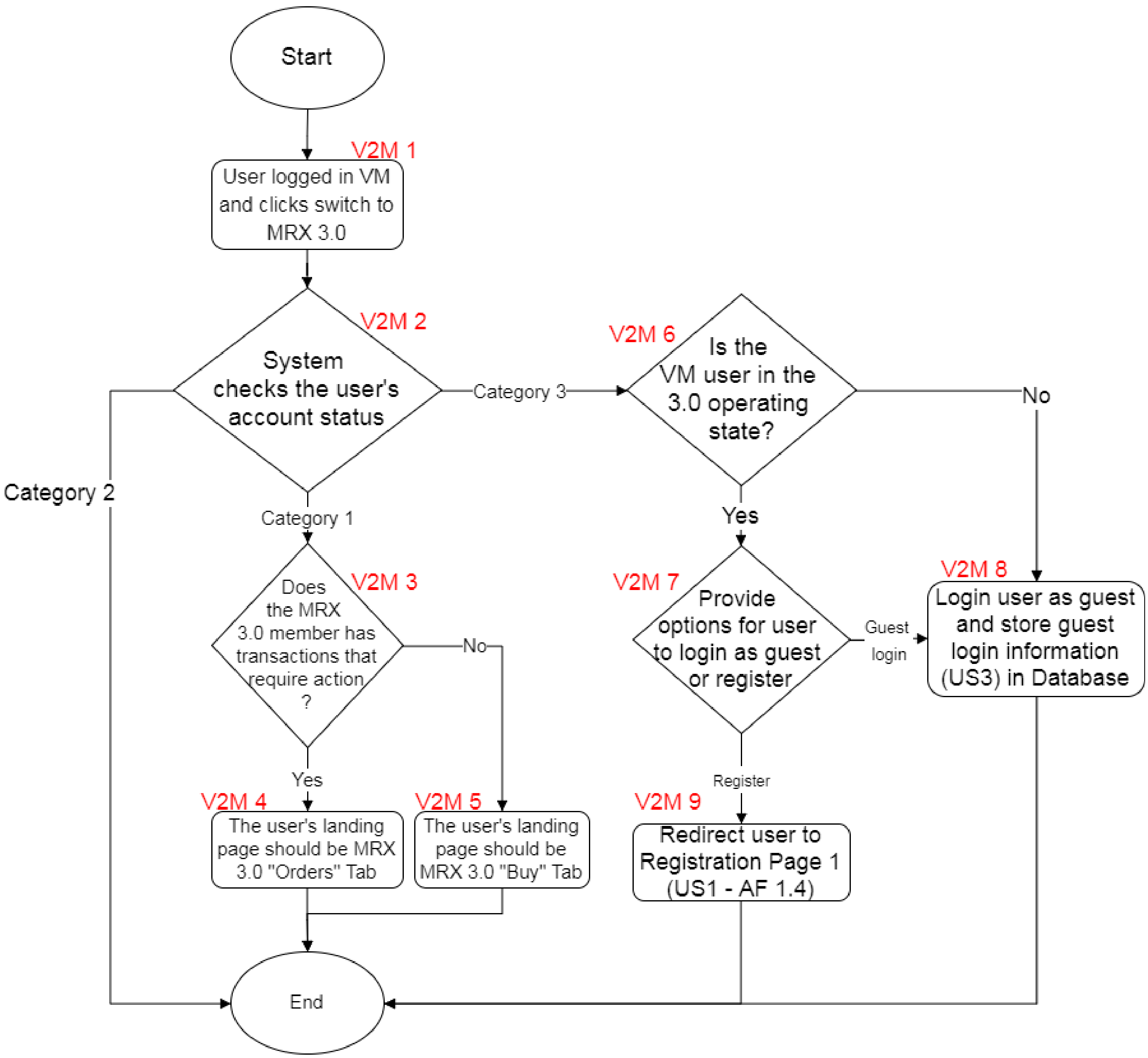
1. The user click "Wholesaler Login" (different from the login link for pharmacy members). The webpage displays the fields mentioned in DF_Vendor Login and the link "Forgot Password". If the user clicks "Forgot password", skip to Vendor Forgot Password flow. Else proceed.
2. The users enters the information and clicks "Submit".
3. The system checks in MRX DB if the information provided has access to VM Vendor application (Category 1 - BR_Account Status). If the user doesn't have access (Category 2&3 - BR_Account Status), then the user is shown the error message (BR_Error Message) and repeat step 2. If user has access, proceed to next step.
4. The system should redirect the user to VM "Orders" page and the flow ends.

Vendor Forgot Password flow:

1. The user clicks on "Forgot Password"
2. The user is shown a popup with the field mentioned in DF_Vendor Forgot Password.
3. The user enters the information.
4. The systems checks if the information provided has access to any of the MRX application (Category 1 - BR_Account Status). If yes, proceed to next step. Else skip to step 6.

5. The system will send a link to the email address to reset the password BR_Forgot Password and the flow ends.
6. The system displays an error message that the information provided is incorrect BR_Error Message and the user has to re-enter the information. Repeat from Step 3.

Switch from VM to MRX 3.0



Preconditions
Application: VM **Navigation**: User is in www.matchrx.com **User Status:** Registered and Active VM buyer user

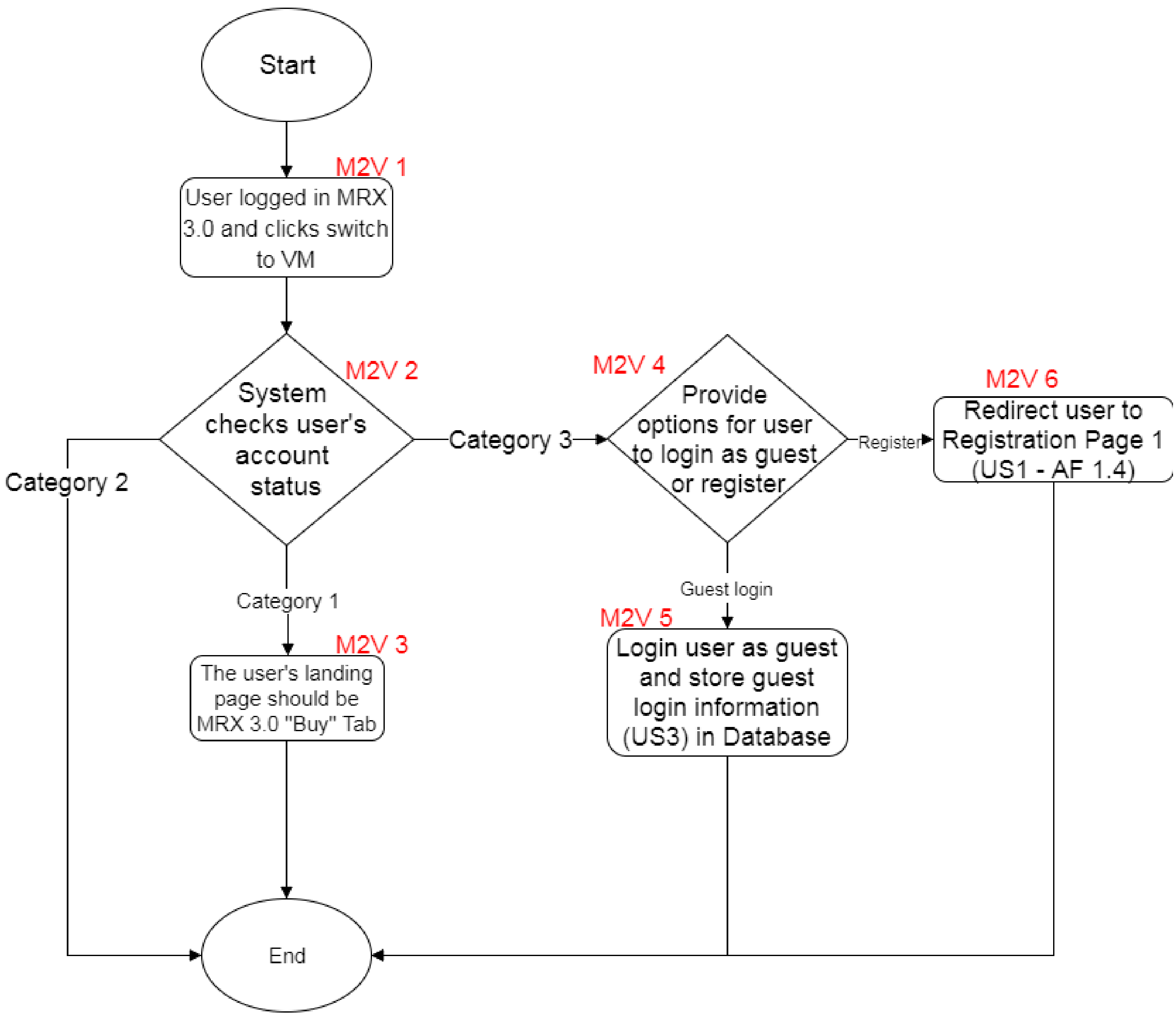
Switch Applications VM to MRX 3.0 flow:

1. The user is logged in to VM as buyer and clicks "Switch to MatchRX 3.0"
2. The system checks if the user has access to MRX 3.0 (Category 1 - BR_Account Status). If yes, proceed to next step. If the user is

registered but do not have access (Category 2 - BR_Account Status) display the message mentioned and process ends. Else (Category 3 - BR_Account Status) skip to step 6.

3. The systems checks if the MRX 3.0 member has any transactions that require action (BR_Transactions requiring action). If yes, proceed to next step. Else skip to step 5.
4. The user's landing page should be MRX 3.0 "Orders" page and the process ends.
5. The user's landing page should be MRX 3.0 "Buy" page and the process ends.
6. The system checks if the VM member is in MRX 3.0 operating state. If yes, proceed to next step. Else skip to step 8 with the message, "Sorry, we do not operate MatchRX 3.0 in your state. We will contact you once operational. You are now logged in as a guest."
7. The system should provide two options for user, "Login as Guest" or "Register". If the user chooses "Login as Guest", proceed to next step. Else skip to step 9
8. The system should login the user as guest into MRX 3.0 without requesting any additional information from the user and store information mentioned in US 3 - Guest Login in the database. The process ends.
9. The system should redirect the user to page 1 of registration as explained in US 1 (Refer US 1 - MRX 3.0 & VM Buyer Registration - AF 1.4). The process of switching app ends.

Switch from MRX 3.0 to VM

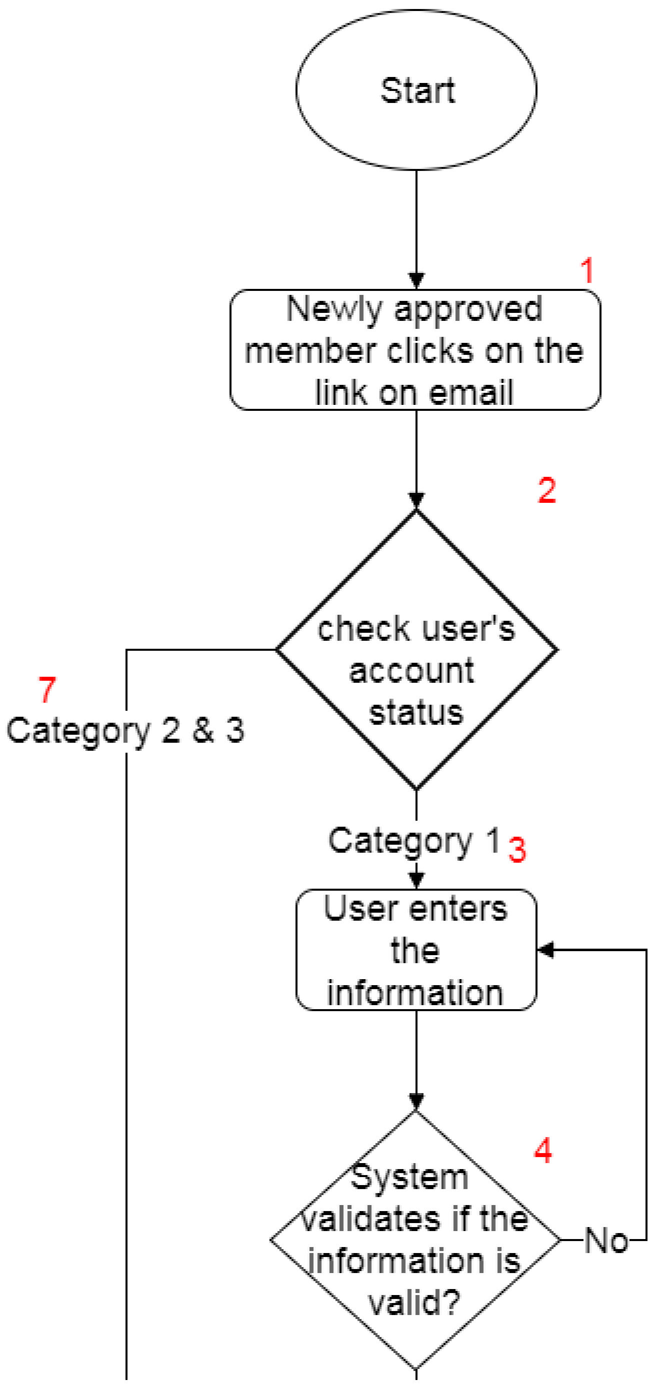


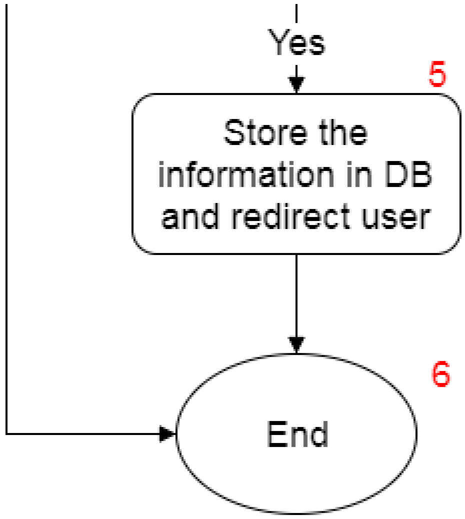
Preconditions
Application: MRX 3.0 **Navigation**: User is in www.matchrx.com **User Status:** Registered and Active MRX 3.0 buyer user

Switch Applications MRX 3.0 to VM flow:

1. The user is logged in MRX 3.0 and clicks "Switch to VM"
2. The system checks if the user has access to VM(Category 1 - BR_Account Status). If yes, proceed to next step. If the user is registered but do not have access (Category 2 - BR_Account Status) display the message mentioned and process ends. Else (Category 3 - BR_Account Status) skip to step 4.
3. The user's landing page should be VM "Buy" page and the process ends.
4. The system should provide two options for user, "Login as Guest" or "Register". If the user chooses "Login as Guest", proceed to next step. Else skip to step 6
5. The system should login the user as guest into VM without requesting any additional information from the user and store information mentioned in US 3 - Guest Login in the database. The process ends.
6. The system should redirect the user to page 1 of registration as explained in US 1 (Refer US 1 - MRX 3.0 & VM Buyer Registration - AF 1.4). The process of switching app ends.

Approved Member Registration





Preconditions
Application: MRX 3.0 or VM **Navigation**: User clicks on the link on email **User Status:** Newly approved member

Approved member registration:

1. A newly approved member will receive an email *(BR_Approved member registration)* on the primary contact email account with a link to create user name and password. The user clicks on the link.
2. On clicking, the system should check if the user has access to at least one of the application (Category 1 - BR_Account Status). If no, skip to step 7. If yes, proceed to next step
3. The user should be directed to MatchRX website "US 6 - Pharmacy Menu - Contacts Manager - Edit Contact - Scenario 3 page". The user enters the information.
4. The system validates the information and if valid, proceed to Step 4. Else repeat Step 2.
5. The information is stored in the MatchRX DB and the user is redirected as mentioned in "US 6 - Pharmacy Menu - Contacts Manager - Edit Contact - Scenario 3 page". If the member is approved for both MRX 3.0 and VM, the link should direct the user to MRX 3.0 by default.
6. The process ends.
7. If the user doesn't have access to any of the applications(Category 2 or 3 - BR_Account Status for all three applications), display the message mentioned and the process ends.

Data Fields

DF_Pharmacy Login

Field Name	Example	Data Type	Default Value	M/O/R*	Control Type	Remarks
DEA # (AB1234567)	AB1234567/ A01234567	First character has to be Alphabet. Next character is alphanumeric and last 7 characters has to be Numeric (min 9, max 9)	Empty	M	Text box	DEA is not case sensitive.
Username	jsmith	min 5, max 30	Empty	M	Text box	Usernames will be a normal string, lowercase and uppercase is allowed in login page and forgot password page but not while creating username, no spaces. Numbers and Symbols should be allowed as far as it is not the first character. Symbols should not be allowed other than underscores "_", dots "." or dashes "-".
Password		min 8, max 20	Empty	M	Text box	At least one number, one caps letter, and one symbol. No spaces or "$" sign allowed. BR_Password Rules. Password field validation is not required on mobile app and website.

DF_Pharmacy Forgot Password

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
DEA # (AB1234567)	AB1234567/ A01234567	First character has to be Alphabet. Next character is alphanumeric and last 7 characters has to be Numeric (min 9, max 9)	Empty	M	Text box	DEA is not case sensitive.
Username	jsmith	min 5, max 30	Empty	M	Text box	Usernames will be a normal string, lowercase and uppercase is allowed in login page and forgot password page but not while creating username, no spaces. Numbers and Symbols should be allowed as far as it is not the first character. Symbols should not be allowed other than underscores "_", dots "." or dashes "-".

DF_Vendor Login

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
Username	jsmith	min 5, max 30	Empty	M	Text box	Usernames will be a normal string, lowercase, no spaces. Numbers should be allowed as far as it is not the first character. Symbols should not be allowed other than underscores "_", dots "." or dashes "-".
Password		min 8, max 20	Empty	M	Text box	At least one number, one caps letter, and one symbol. No spaces or "$" sign allowed. BR_Password Rules

DF_Vendor Forgot Password

Field Name	Example	Data Type	Default Value	M/O/R*	Control Type	Remarks
Username	jsmith	min 5, max 30	Empty	M	Text box	
email	johnsmith@gmail.com	Varchar	Empty	M	Text box	

M – Mandatory   O – Optional   R – Read only

Business Rules

BR_Forgot Password

When the user tries to reset the password and provide the right information, the user will receive an email with a link to MatchRX to their registered email address. If an email address in not attached to the user profile (it is possible when a 2.0 user has never logged in to 3.0 system and has clicked on "forgot password"), the email with link should be sent to primary user's email address. The webpage should display the following two fields and Submit button
New Password
Confirm New Password

When user resets the password, it should change for all MRX products for that user.

The content of the email will be
Dear {First name}
You have requested to change your password.
Click here {link to change password}.

If you did not request a password reset contact Customer Service immediately at 877-590-0808 or customerservice@matchrx.com!
Thank you for using MatchRX!
We respect your privacy and will not share your personal information with any unauthorized third party.

BR_Error Message

When user tries to login and enters incorrect login credentials, the webpage contains the following message:
Login not recognized. Please try again or contact customer service at 877- 590-0808.

When user tries to reset password and enters incorrect credentials, the webpage contains the following message:
Login not recognized. Please try again or contact customer service at 877- 590-0808.

BR_Switching Application

Same user credentials should provide the access for all products (if already registered for a particular product).If user is logged in already - log-out should not be required to go to another product as long as the user has access (when switching 3.0 FO to VM FO or opposite)
User can easily switch to VM by clicking the "Switch to VM" button on the top left of the page and vice-versa.

BR_Password Rules

The passwords for the MatchRX 3.0 should follow strict rules. At least 8 characters (max 20), with at least one number, one caps letter, and one symbol. No spaces or "$" sign allowed.
Password has to be stored in an encrypted form (using MCRYPT technology SALT). Password will validate by comparing the encrypted form during password input. No unencrypted passwords should ever reach MatchRX DB.
Old (legacy) passwords may be kept as they are when transitioning from MRX 2.0 to MRX 3.0.

When a user changes a password, display the below message (Mobile and Web) on all systems and log out the user “You have been logged out due a recent password change. Please login again."

BR_Approved member registration

The following will be the content of the email if the user is approved for MRX 3.0 and VM
Dear {Primary user's first name},
Welcome to MatchRX!CONGRATULATIONS! Your information has been verified and you are now an authorized member of MatchRX. We look forward in helping you better manage your inventory.Simply click here{link to contact manager-edit profile page} to finish creating your user profile. Your sales rep will contact you shortly to set up a QuickStart training session. It is worth the time and will ensure a smooth experience when buying and selling.QUICK TIPS...1. We suggest getting started with posting a minimum of 25 items for sale. Since most orders involve 2-6 items, it gives Buyers in the marketplace a chance to see more of your overstocked inventory and will allow them to purchase several items in each order. After you post your 25th item, your selling fee will drop from 12% to 9.5% for every item sold going forward.2. Use the MatchRX stickers you will be receiving in the mail to help track the inventory posted on the website. Simply place a sticker on each bottle to remind you it is posted for sale.3. Go shopping!! You will likely find what you need at a great price while helping other members reduce their overstock. The average discount is 36% below WAC. Many members shop every day.4. If you're sending a FedEx Ground shipment, please use a small box with adequate packing to ensure against breakage during shipment. DO NOT SHIP ANY ORDERS USING PADDED ENVELOPES. Envelopes do not protect the shipment from damage. We'll send you complimentary FedEx Express boxes for Overnight and 2-Day shipments.5. Call your sales representative when notified of your first sale. They will walk you through the seller confirmation process to ensure the item is packaged and shipped correctly. 877-590-0808
Sticker Copy
MatchRX sticker: "Place a MRX sticker on each posting. This provides you a reminder to modify or remove a posting if you sell or partially dispense the item through your pharmacy."
Refrigerate Upon Arrival sticker: "Place sticker on shipments which are frozen or refrigerated. Helping your Buyer identify the item(s) in the box need immediate attention."

The following will be the content of the email if the user is approved for VM only
Dear {Primary user's first name},
Welcome to the MatchRX vendor marketplace!CONGRATULATIONS! Your information has been verified and you are now an authorized member. We look forward to bringing you unique pharmacy storefront products. Simply click here{link to contact manager-edit profile page} to finish creating your user profile.Your sales rep will contact you shortly to set up a QuickStart training session. It is worth the time and will ensure a smooth experience.

BR_MRX2.0 User Transition

When transition from MRX 2.0 to MRX 3.0, the existing MRX 2.0 users have to be transitioned to the new login experience with three fields. The database will be updated with default username (out of scope for HTC) as follows.

The existing user's default username will be first alphabet of first name and full last name. The first name and the last name used for the Contacts Manager page in MRX 2.0 will be used to create the username. For example,
First name: Matt
Last name: Smith
Default username: msmith

If more than one user within the same DEA # happens to have same first alphabet of first name and full last name, a number is added (consecutively) at the end of the user name. For example.
First name: Mike
Last name: Smith
Default username: msmith1
First name: Martin
Last name: Smith
Default username: msmith2

If the DEA # is not same, the system can create same username for multiple users with the first alphabet of first name and full last name. The username should be unique only within the same DEA #.

On the login screen, there should be a question mark next to the username field. When the user clicks on that question mark, following message will pop up to guide the existing MRX 2.0 user to enter the pre-created username
If you do not have a username, enter first initial and lastname (eg. John Smith's username is jsmith)

Once the user logs in, display the below message and redirect the user to "US 6 - Pharmacy Menu - Contacts Manager - Edit Contact - Scenario 3 page".
We've updated and added new services to MatchRX! Follow the steps below to finalize your individual username and password.

BR_Transactions requiring action

The following order statuses are considered as transaction requiring action:

1. Pending Buyer confirmation - only if the user is a buyer
2. Pending Seller confirmation - only if the user is a seller
3. Seller revised - only if the user is a buyer

BR_Account status

Following are the possible account (Member and not Member users - updated on April 4th) status for each of the applications. In the database, the three application statuses (MRX 3.0, VM Buyer and VM Wholesaler Status) are stored as three separate fields.

Category	Account (Member) Status	MRX 3.0 Status	VM Buyer Status	VM Wholesaler
Category 1	**No Buy**	Inside Buy tab, display the message "Your access to the Buy tab has been restricted. Please contact customer service at 877-590-0808" on top of a greyed out buy marketplace. User will have full access to all other tabs	Inside Buy tab, display the message "Your access to the Buy tab has been restricted. Please contact customer service at 877-590-0808" on top of a greyed out buy marketplace. User will have full access to all other tabs	N/A
	No Sell	Inside Sell tab, display the message "Your access to the Sell tab has been restricted. Please contact customer service at 877-590-0808" on top of a greyed out Post an item page. User will have full access to all other tabs	N/A	Inside Sell tab, display the message "Your access to the Sell tab has been restricted. Please contact customer service at 877-590-0808" on top of a greyed out Post an item page. User will have full access to all other tabs
	No Buy & No Sell	Union of No buy and No sell.	N/A	N/A
	Active	No restrictions	No restrictions	No restrictions

<table>
<tr><td rowspan="3">Category 2</td><td>Closed</td><td>No Access. On the landing page, display the message "Your MatchRx 3.0 account has been closed. Please contact customer service at 877-590-0808". The User will not have access to any tabs on the left menu but can switch to VM Buyer</td><td>No Access. On the landing page, display the message "Your Vendor Marketplace account has been closed. Please contact customer service at 877-590-0808". The User will not have access to any tabs on the left menu but can switch to MRX 3.0</td><td>No Access. On the landing page, display the message "Your Vendor Marketplace account has been closed. Please contact customer service at 877-590-0808". The User will not have access to any tabs on the left menu</td></tr>
<tr><td>Suspended by MRX</td><td rowspan="2">No Access. On the landing page, display the message "Your MatchRx 3.0 account has been suspended. Please contact customer service at 877-590-0808". The User will not have access to any tabs on the left menu but can switch to VM Buyer</td><td rowspan="2">No Access. On the landing page, display the message "Your Vendor Marketplace account has been suspended. Please contact customer service at 877-590-0808". The User will not have access to any tabs on the left menu but can switch to MRX 3.0</td><td rowspan="2">o Access. On the landing page, display the message "Your Vendor Marketplace account has been suspended. Please contact customer service at 877-590-0808". The User will not have access to any tabs on the left menu</td></tr>
<tr><td>Suspended voluntary</td></tr>
<tr><td colspan="5"></td></tr>
<tr><td>Category 3</td><td>Inactive (when the user hasn't registered for that particular application)</td><td>No access. Refer Switch from MRX 3.0 to VM</td><td>No access. Refer Switch from VM to MRX 3.0</td><td>N/A</td></tr>
</table>

Acceptance Criteria

Pharmacy Login

1. The following types of users are able to successfully login using Member login:
    a. VM Buyer only
    b. MRX 3.0 Buyer only
    c. MRX 3.0 and VM Buyer
2. The VM vendor is NOT able to login using Member login
3. A pharmacy user (VM buyer or MRX 3.0 user) is able to successful reset the password using "Forgot Password" in Member login.
4. A VM seller is NOT able to successful reset the password using "Forgot Password" in Pharmacy login
5. The user receives the correct error message when incorrect information is provided during:
    a. Login
    b. Forgot password
6. The following types of users user with orders requiring action is taken to the MRX 3.0 " Order" tab after login
    a. MRX 3.0 Buyer only
    b. MRX 3.0 and VM Buyer user choosing MRX 3.0
7. A MRX 3.0 only user without orders requiring action is taken to the MRX 3.0 " Buy" tab after login
    a. MRX 3.0 Buyer only
    b. MRX 3.0 and VM Buyer user choosing MRX 3.0
8. A MRX 3.0 and VM buyer user is given the option to choose the application while logging in.
9. A MRX 2.0 user logging in for the first time in MRX 3.0 should be able to log in with default username and redirected to "US 6 - Pharmacy Menu - Contacts Manager - Edit Contact - Scenario 3 page"

Vendor Login

1. A VM Seller is able to successfully login using Wholesaler login.
2. The following types of users are NOT able to login using vendor login
    a. VM Buyer only
    b. MRX 3.0 Buyer only
    c. MRX 3.0 and VM Buyer
3. A VM seller is able to successful reset the password using "Forgot Password" in Wholesaler login
4. A pharmacy user (VM buyer or MRX 3.0 user) is NOT able to successful reset the password using "Forgot Password" in Wholesaler login.
5. The user receives the correct error message when incorrect information is provided during:
    a. Login
    b. Forget password

Switch VM to MRX 3.0

1. A VM user who has access to MRX 3.0 is logged into
    a. "Buy" page if the user do not have orders requiring action
    b. "Order" page if the user has orders requiring action
2. A VM user does not have access to MRX 3.0 and is in a MRX 3.0 operating state, then user is given the option to register or login as

guest.
3. A VM user who does not have access to MRX 3.0 and is in a MRX 3.0 non-operating state, then user is logged in as guest.

Switch MRX 3.0 to VM

1. A MRX 3.0 user who has access to VM is logged into VM "Buy" page
2. A MRX 3.0 user does not have access to VM is given the option to register or login as guest.

Approved Member Registration

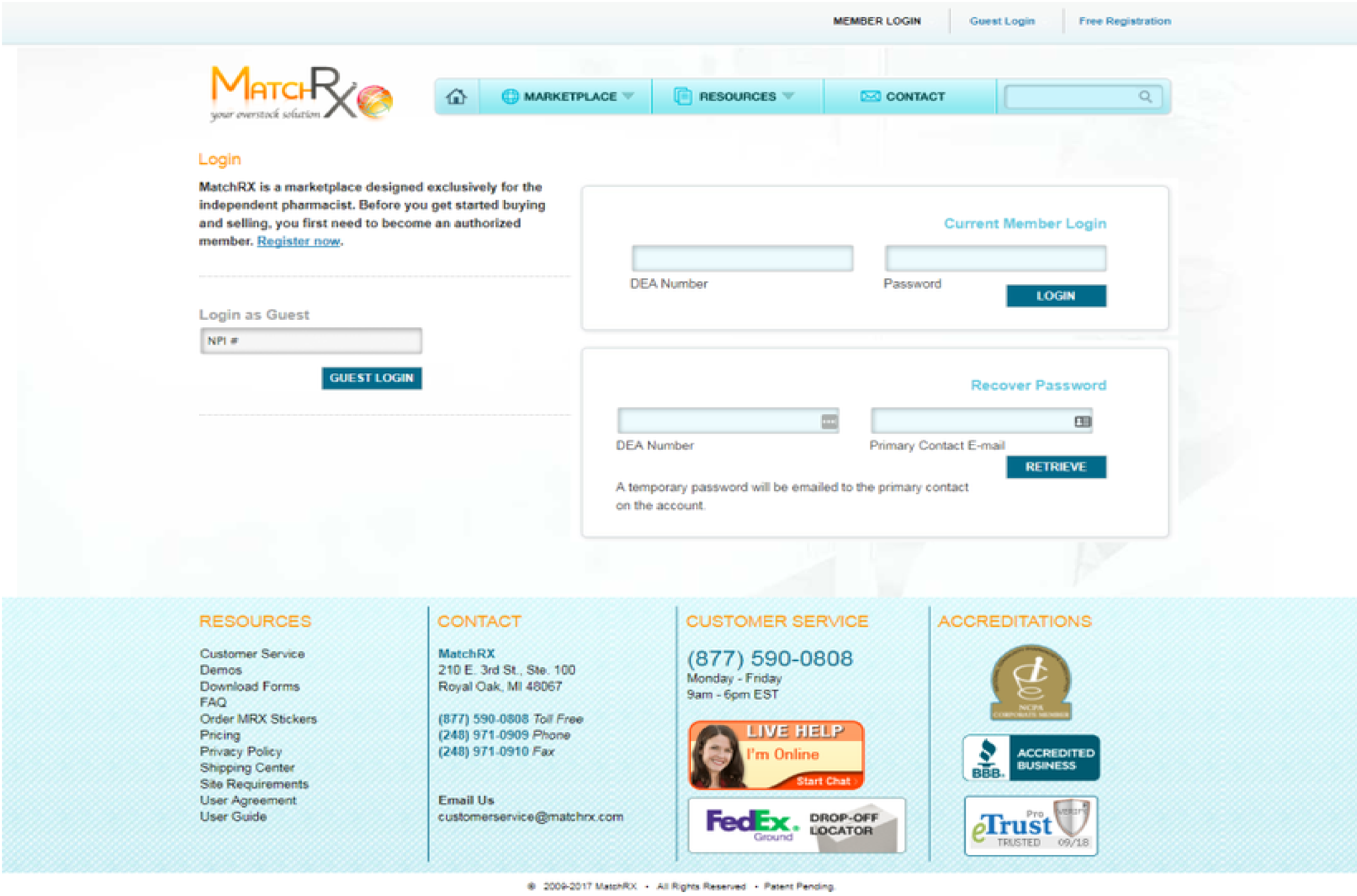
1. An email is triggered to the primary user's email address when a member is approved.

Screen Prototype

Page 1: MatchRX Home Page
Fields should be one below the other. Click on forget password should be pop up on middle of the page. Question mark icon next to username to provide message mentioned in BR_MRX2.0 User Transition. Two Links – Member Login & Wholesaler Login

Page 2 - www.matchrx.com/loginpage

Remove Guest Login from this page.



Wire-frame

Login

US4-SING...N-ON.pdf

Forgot Password: Page 13-19

US3-Gues...word.pdf

Test Data Requirement

1. Registered pharmacy member table to check login and forgot password
2. SendGrid integration to test emails for forgot password
3. Registered VM wholesaler member table to check login and forgot password

US 6 - Pharmacy/VM Wholesaler Menu

WBS #	

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-1291	WBS 22 : PHP MRX-Seller Rating	Jul 05, 2018 10:35		rajasekar.jeyakumar@htcindia.com	IN QA	Unresolved	Sprint 12
MHX-827	CLONE - WBS 18: PHP Create new user for current pharmacy	Mar 07, 2018 07:49		Varun Sankaranarayana	IN STAGING	Unresolved	Sprint 6
MHX-515	CLONE - WBS 12: User access check	Apr 19, 2018 08:25		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	
MHX-342	WBS 78: VM Delete User	Mar 07, 2018 07:45		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 5
MHX-341	WBS 77: VM Review user details	Mar 07, 2018 07:44		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 5
MHX-340	WBS 76: VM Create new user for current Company	Mar 07, 2018 07:44		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 5
MHX-339	WBS 73: PHP VM Shipping Address	Mar 22, 2018 08:28		Karthigaichamy Malaimegam	IN QA	Unresolved	Sprint 7
MHX-315	WBS 232: BO - Review Vendor Agreement Details	Mar 07, 2018 07:50		Swapna.Patnaikuni	IN STAGING	Unresolved	Sprint 6
MHX-246	WBS 74: PHP VM Vendor agreement details [view only]	Jan 16, 2018 10:18		Rajeswari M [X]	IN STAGING	Unresolved	Sprint 3
MHX-245	WBS 72: PHP VM Payments Section	Sep 19, 2018 13:10		Senthil Vasan	IN QA	Unresolved	Sprint 10
MHX-244	WBS 71: PHP VM Company Menu	Jan 16, 2018 10:17		Rajeswari M [X]	IN STAGING	Unresolved	Sprint 3
MHX-168	WBS 22: PHP Display Pharmacy Seller rating	Jun 11, 2018 10:35		rajasekar.jeyakumar@htcindia.com	IN QA	Unresolved	Sprint 11
MHX-65	WBS 20: PHP Delete User	Mar 07, 2018 07:43		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 5
MHX-64	WBS 19: PHP Review user details	Mar 07, 2018 07:43		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 5
MHX-63	WBS 18: PHP Create new user for current pharmacy	Mar 07, 2018 07:43		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 5
MHX-62	WBS 17: PHP Review list pharmacy users (Contacts Manager)	Mar 07, 2018 07:42		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 5
MHX-61	WBS 16: Pharmacy info (Pharmacy Profile)	Dec 26, 2017 16:49		V	CLOSED	Unresolved	Sprint 2
MHX-59	WBS 15: Match RX 3.0 - Pharmacy Menu	Dec 26, 2017 16:49		V	CLOSED	Unresolved	Sprint 2
MHX-17	WBS 12: DB Design for User access check	Dec 26, 2017 16:44		V	CLOSED	Unresolved	Sprint 2

	19 issues
Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered active user of MRX website, I want to access pharmacy related information such as "Pharmacy Information" and "Contacts Manager" so that I can view and edit the information.

End Objective:	To provide pharmacy related information to the registered users of the website
User/Actor:	Registered Primary and Secondary user of MRX 3.0 and VM
Program Type:	
Trigger:	"My account" on the left menu on all pages after successfully logged in
Related User Story:	4
Related WBS #:	12, 15 - 20, 22, 71-73, 75-78, 232

Related WBS description:

12	Each registered business entity can have more that 1 user to log-in to front office. Users of corresponding entity will have equal rights except user management and payment section (for VM buyer). Primary contact (Primary User) can add/edit user information of all users and payment section. Other users (Secondary User) can only edit their personal user information and cannot edit payment section.
15	Application always displays a menu allowing quick access to:- pharmacy Info;- Pharmacy settings;- ReportsUser Options- Logout.- Change passwordMenu button name should be "[pharmacy name] ([DEA])".
16	Information about pharmacy which was provided during registration.Read only information. No business rules.

17	List all users for corresponding pharmacyAs a pharmacy I want to view list of contacts (users) authorized to represent the pharmacy:- Column "Edit" ("Edit contact" button [opens "Contacts Manager - Edit Contact" site]);- Column "Delete" ("Delete contact" button [___]);- Column "First Name" (first name);- Column "Last Name" (last name);- Column "Title/Position" (title/position);- Column "Mobile" (mobile phone number);--"Send test SMS" button to trigger mobile number verification. A SMS with unique code will be sent to the mobile number which has to be entered by the user on the screen to verify the mobile number.The SMS will be sent through a third party. Column "Email" (email address);- Column "Primary Contact" (Yes/No);- Column "Receive Notifications Via Email" (Yes/No); - Sales: Item Sold (Yes/No); Payment Submitted (Yes/No) - Purchases: Shipmnet Notification (Yes/No); Delivery Notification (Yes/No)- Column "Receive Notifications Via Text" (Yes/No). - Sales: Item Sold (Yes/No); Payment Submitted (Yes/No) - Purchases: Shipmnet Notification (Yes/No); Delivery Notification (Yes/No) User will have different level of access. **Primary User** - Full functionality (as is in 2.0)There could be more than one primary contact. A primary contact can assign another user as primary.Primary contact will have ability to edit settings of all contacts. **Secondary User:**They can an edit personal information only - Not other user's information. All users will have visibility to all the user's information mentioned above.Edited user info should be also updated for database.
18	As a primary user, I should be able to invite new users by entering email address of the new user.Our system should generate user credentials e-mail so that user could finish with registrationNewly created user should be also added to the Database.This new user will be connected with the pharmacy of the primary user.A BO user should also be able to perform this task on behalf of the primary user.
19	When updating user info, the updated info has to be displayed as a preview with confirm button."Send test SMS" button to trigger mobile number verification. A SMS with unique code will be sent to the mobile number which has to be entered by the user on the screen to verify the mobile number.The SMS will be sent through a third party.
20	Deleting pharmacy user. Only primary user can delete other users. A user can delete their own record. When a user deletes thier own record, it automatically logs out of the website. A Primary user cannot delete their own record. A BO user can delete any user.
71	Application always displays a menu allowing quick access to:- General company info- Vendor Specific Info [Vendors only] which was provided during registrationMember is prohibited from changing ANY Vendor/Buyer Info providing during registration - Payment details - Last 4 digits of account # and bank name- Buyer Specific Info [Buyers only] which was provided during registration - Payment details - Last 4 digits of account # and bank name (if available) - last 4 digits of CC- Logout.- Change passwordIn contacts managers- General settings for user level notification
72	Payment section- Credit card information for VM Buyer only (update/delete/add)- Banking information (if the user is VM buyer or seller, the user will be able to delete the banking information. The user will be able to change the banking information through a form and requiring an approval from BO user)The banking information will be stored in MMS and credit card information will be stored in Zeamster.When new cards are added, type of card (Visa, master) will be identified on the fly.
73	This section will available only to VM buyer.The user will have the ability to add new addresses.Limit 5.
74	To be taken from Vendor Agreement formIndividual, per-vendor parameters have to be displayed (read only). Parameters define terms of cooperation and are used to calculate vendor charges. Ability to print/download/email.
75	List all users for corresponding pharmacyAs a pharmacy I want to view list of contacts (users) authorized to represent the pharmacy:- Column "Edit" ("Edit contact" button [opens "Contacts Manager - Edit Contact" site]);- Column "Delete" ("Delete contact" button [___]);- Column "First Name" (first name);- Column "Last Name" (last name);- Column "Title/Position" (title/position);- Column "Mobile" (mobile phone number);--"Send test SMS" button to trigger mobile number verification. A SMS with unique code will be sent to the mobile number which has to be entered by the user on the screen to verify the mobile number.The SMS will be sent through a third party. Column "Email" (email address);- Column "Primary Contact" (Yes/No);- Column "Receive Notifications Via Email" (Yes/No); - Purchases: Shipmnet Notification (Yes/No)- Column "Receive Notifications Via Text" (Yes/No). - Purchases: Shipmnet Notification (Yes/No) User will have different level of access. Primary User - Full functionality (as is in 2.0)There could be more than one primary contact. A primary contact can assign another user as primary.Primary contact will have ability to edit settings of all contacts. Secondary User:They can an edit personal information only - Not other user's information. All users will have visibility to all the user's information mentioned above.Edited user info should be also updated for database.
76	A registered member should be able to invite a new user by providing the email address of the new user.Our system should generate user credentials e-mail to that email address so that user can register.Newly created user should be also updated in database.This new user will be connected with the pharmacy of the primary user.A BO user should also be able to perform this task on behalf of the primary user.
77	When updating user info, the updated info has to be displayed as a preview with confirm button."Send test SMS" button to trigger mobile number verification. A SMS with unique code will be sent to the mobile number which has to be entered by the user on the screen to verify the mobile number.The SMS will be sent through a third party.
78	Deleting user. Only primary user can delete other users. A user can delete their own record and will be immediately logged out. . A Primary user cannot delete their own record. A BO user can delete any user.
232	Ability to upload a pdf document (one file - multiple pages) which will be available for the seller to view from VM Front office

Business Rules

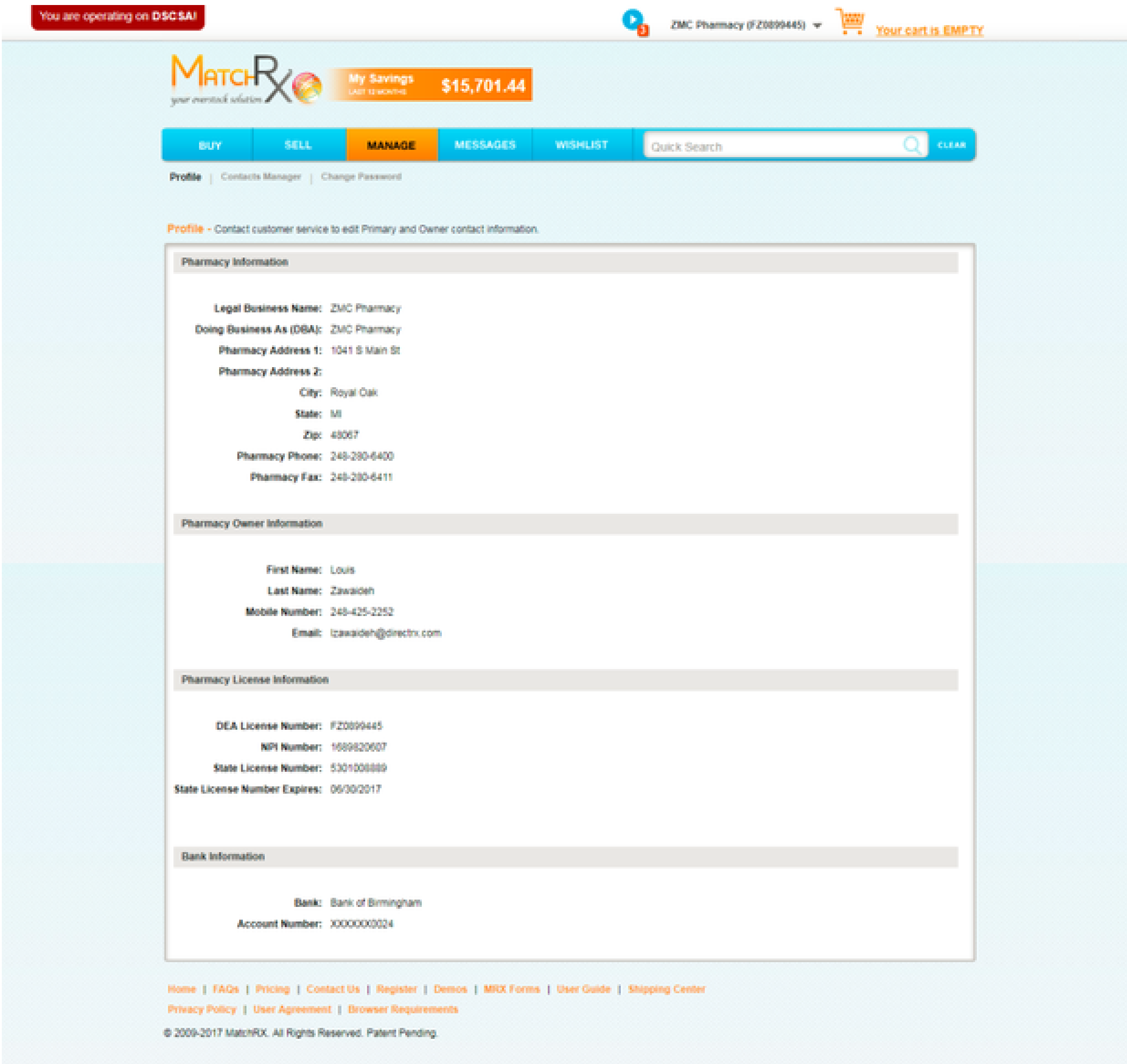
The "My account" menu will be on the bottom left on all pages once logged in. "My account" may contain the following tabs .

Pharmacy Information (Available only if the member has either MRX 3.0 or VM buyer access)

When the user clicks on "My account", the default view will be "Pharmacy information" tab and it will contain the following fields. All these information will be provided by the user during registration. Refer US 1 - MRX 3.0 & VM Registration to know details about the data The information will be read only but can updated by the back office user.

Pharmacy Information: Legal Business Name Doing Business as (DBA) Pharmacy Shipping Address 1 Pharmacy Shipping Address 2 Pharmacy Shipping City Pharmacy Shipping State Pharmacy Shipping Zip Code Pharmacy Phone Pharmacy Fax Pharmacy Mailing Address 1 Pharmacy Mailing Address 2 Pharmacy Mailing City Pharmacy Mailing State Pharmacy Mailing Zip Code
Pharmacy Owner Information: First Name Last Name Mobile Number Email Address
Pharmacy License Information: NCPDP Number DEA License Number DEA Expiration Date NPI Number State License Number State License Expiration Date

Below is the current page attached for reference:



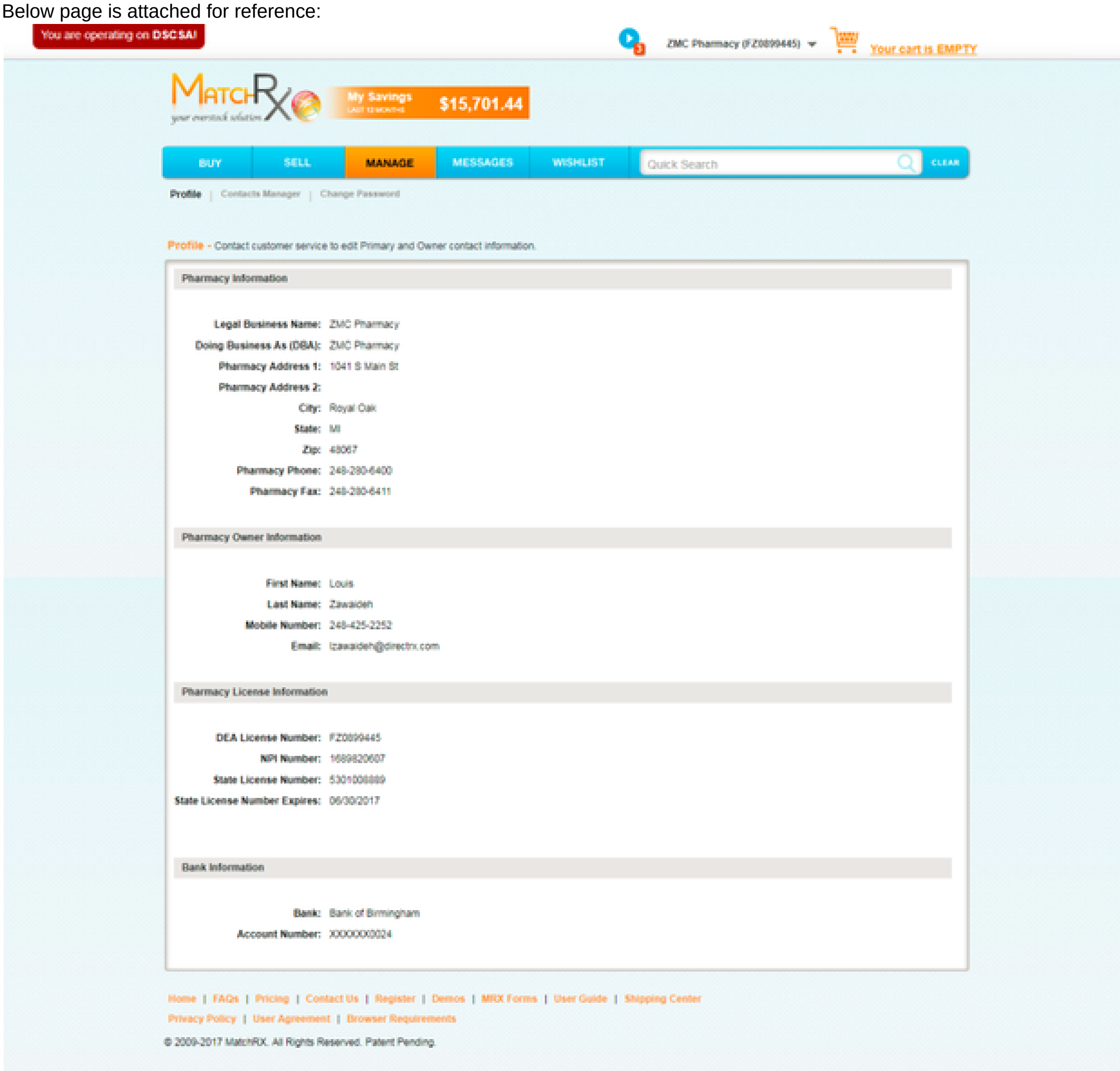
Company Information (Available only if the member has VM wholesaler access)

When the user clicks on "My account", the default view will be "Company information" tab and it will contain the following fields. All these information will be provided by the user during registration. Refer US 12 - VM Wholesaler Registration Page to know details about the data The information will be read only but can updated by the back office user.

Company Information: Legal Business Name Doing Business as (DBA) Billing Address 1 Billing Address 2 Billing City Billing State Billing Zip Code Pharmacy Phone Pharmacy Fax Shipping Address 1 Shipping Address 2 Shipping City Shipping State Shipping Zip Code

Primary Contact Information: First Name Last Name Mobile Number Email Address
Wholesaler Agreement (visible only to primary user): Download button for the user to download signed wholesaler agreement

Below page is attached for reference:



~~Seller Rating~~ *(Yet to decide. Have to address in one of the later sprints)*

~~Scale 1 to 5 with 0.5 point granulation. A special rating value "no history" should be displayed if the pharmacy has no sales record.~~
~~Factors that will affect the rating~~
~~1. Time taken by seller to confirm the order,~~
~~2. From last 20 completed + canceled orders:~~
~~% of Orders canceled by sellers~~
~~% of Orders revised by the Seller excluding canceled orders.~~
~~%'s will include matrix of tiers that determine rating stepdown. Example:~~
~~Canceled % => 10% < 15% 1/2 star stepdown~~
~~Canceled % => 15% < 20% 1 star stepdown~~

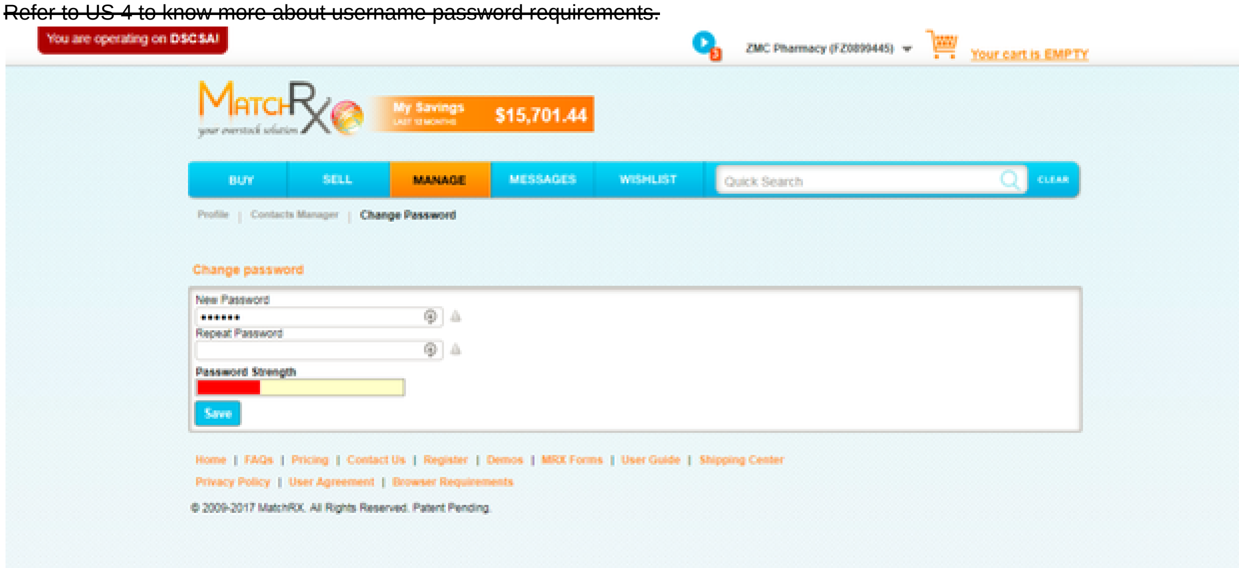
~~Rating given by the buyer.~~
~~Back officer user to have the functionality to change parameters (weightage) in the above mentioned variable.~~

~~Change Password~~ (Moved with edit contact page)

~~When a user clicks on "Change Password", the following fields should be displayed.~~

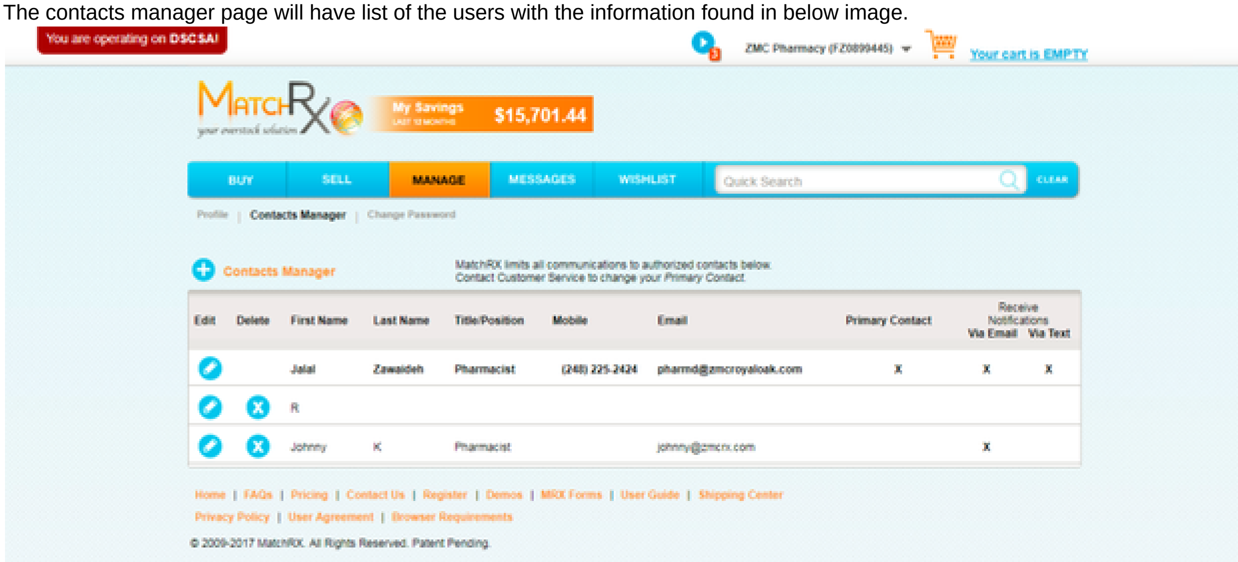
~~Current password:~~
~~New password: *Format instructions*~~
~~Confirm new password:~~
~~Password strength:~~

~~Refer to US-4 to know more about username password requirements.~~



Contacts Manager (Available for all members including MRX 3.0, VM buyer or VM wholesaler)

User options mentioned in Backlog WBS # 15 is renamed as "Contacts Manager"
The contacts manager page will have list of the users with the information found in below image.



There will four levels of user access with certain functionalities and restrictions as explained below:
Primary users have the following access and restrictions:

1. Ability to delete any secondary, finance and no access user and other primary users.
2. Ability to add any type of user.
3. There can be more than one primary user and there must be at least one primary user.
4. Ability to delete personal user profile as long as there is at least one other primary user profile attached to the account. When a primary tries to delete personal profile, the user is asked to confirm the deletion with the following message warning and the user will be log out immediately "Are you sure you want to delete your profile? Please note you will be immediately logged out and will not be able to log in again"
5. Ability to edit non primary users' information including user name and password but cannot edit any primary users' first name, last name and title including their own.
6. Cannot edit any banking information (masked) or company information but they will be able to edit credit card information if they have VM buyer access.
7. Ability to view other user's profile information
8. Ability to view banking information (masked), credit card information (masked) and company information
9. Ability to change notification preference of any user (BR_Notification)
10. Ability to access both MRX 3.0 and VM buyer if the pharmacy has access to both.

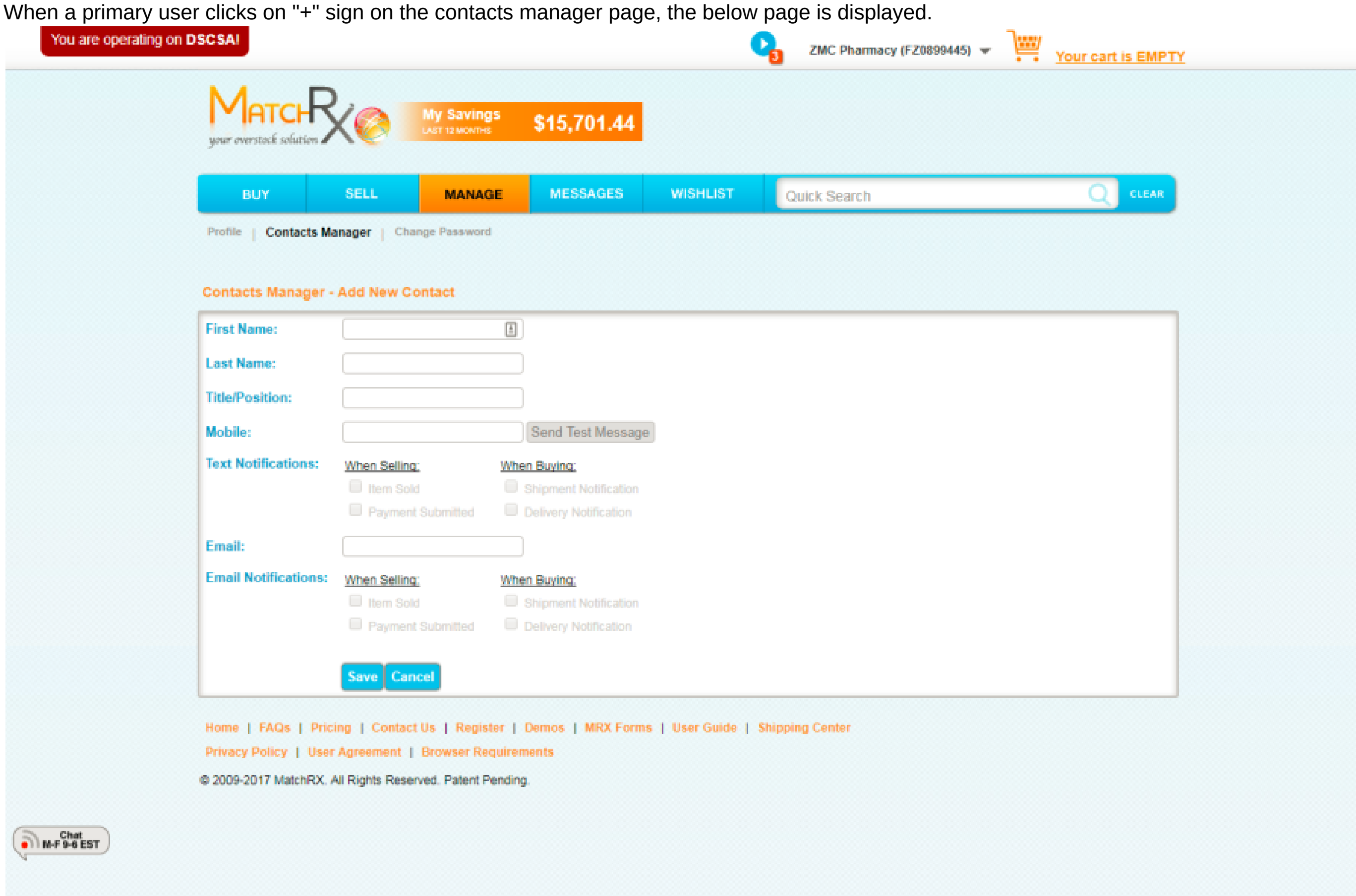
Secondary users have the following access and restrictions:

1. Ability to delete personal user profile only but cannot delete other users' profile. When a secondary tries to delete personal profile, the user is asked to confirm the deletion with the following message warning and the user will be log out immediately "Are you sure you want to delete your profile? Please note you will be immediately logged out and will not be able to log in again".
2. Cannot add any type of user
3. Ability to edit personal (self) user information but cannot edit other users' information
4. Cannot edit any financial information (masked) or company information
5. Ability to view other user's information excluding username and password.
6. Ability to view financial information (masked) and company information
7. Ability to change personal notification preference but cannot change notification preference of other users (BR_Notification)
8. Ability to access both MRX 3.0 and VM if the pharmacy has access to both.

Finance users and No access users do not have access to the website.

Invite new user

When a primary user clicks on "+" sign on the contacts manager page, the below page is displayed.



- One additional field (Radio buttons) required that is not mentioned in above image is "User access:"

    - Primary access: the newly invited user will be a primary user.
    - Secondary access: the newly invited user will be a secondary user.
    - Finance: the newly invited user will not have access to the website and will not have username and password. (Business reason: These types of users can call a BO user to get order and financial details. These users should be displayed in SalesForce. It is not required to be stored in Maria DB)
    - No access: the newly invited user will not have access to the website and will not have username and password. (Business reason: These types of users are called by the BO user to gather pharmacy information. These users should be displayed in SalesForce. It is not required to be stored in Maria DB)
- First name, Last name and title are mandatory fields for all user access.
- Email is a mandatory field if user access is primary and secondary access. The inviting user will have the ability to enter/choose all other fields.
- Only the primary user and secondary user will receive the email to join - Invited user registration.
- If user access is finance or no access user, notification (text and email) should be greyed out. Mobile and email fields are optional fields. Finance and no access users will not receive notifications.
- When clicked "Save", the system should send an email to the above mentioned email (only primary and secondary user access) with the link to join as a user. The primary user who invited the new user should be redirected to main contacts manager page.
- When the user clicks on "Send Test message", a test message with the message "You are now ready to receive text alerts from MatchRX. Please disregard if received in error." should be sent to the mobile number. The following message is shown on the website "A verification text has been sent to {phone number}. If you do not receive a message, re-enter your mobile number and try again. Contact customer service with any questions: (877) 590-0808"

Invited user registration

An invited user (primary and secondary) will receive an email with a link to join. On clicking, the user should be directed to MatchRX website – Contacts Manager – Edit Contact - Scenario 3 page.
The following will be the content of the email.

Dear {Invited User's First Name},
{Member DBA} has invited you to join MatchRX. Click on the following link to create a username and password.
{link}

Edit Contact

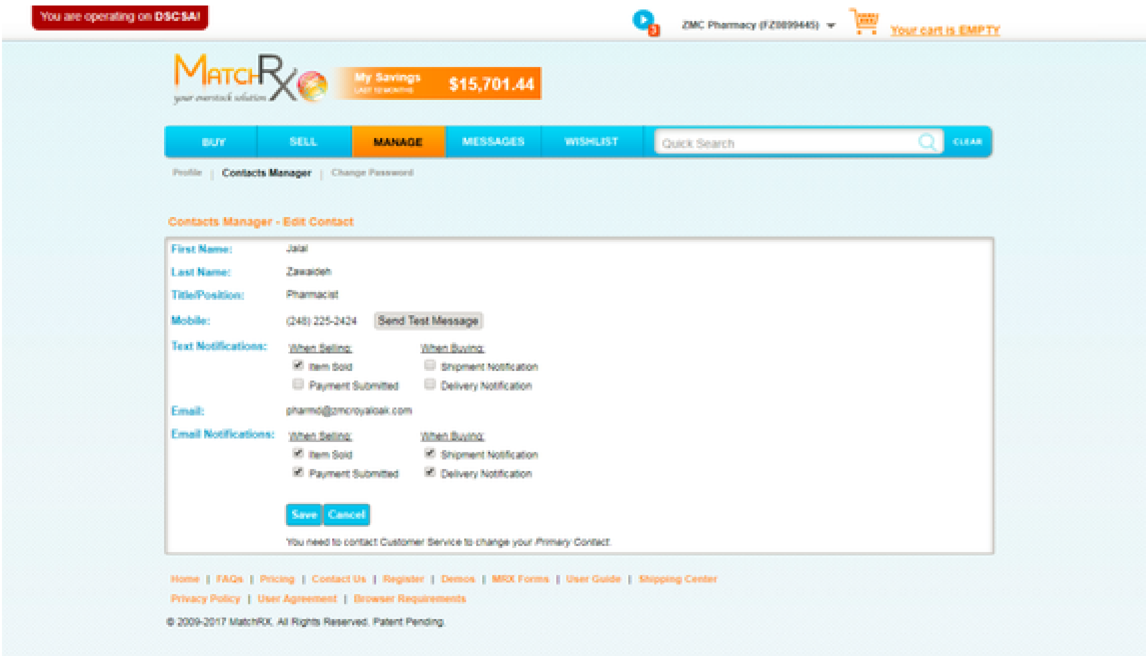
In all the below scenarios, when primary user radio button is selected, display the below message next to the field.

"To change, contact customer service at customerservice@matchrx.com or call 877-590-0808."

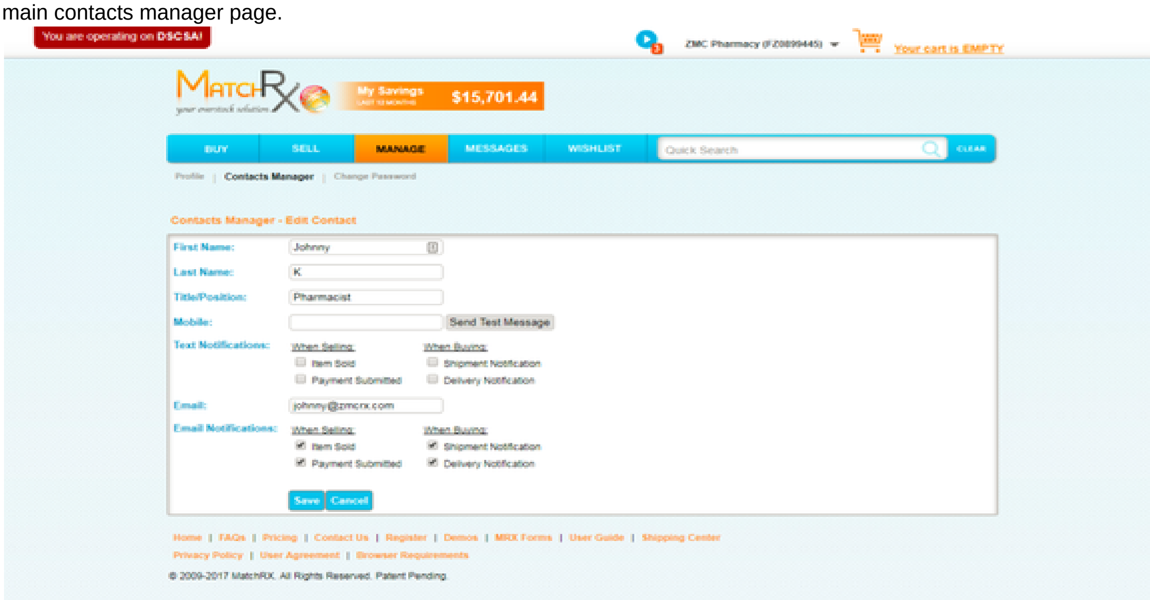
The following fields are mandatory:

- First name
- Last name
- Title
- email address (if primary or secondary)
- User name (if primary or secondary)
- password (if primary or secondary)

Scenario 1:
When a primary user clicks the edit icon of a different primary user on the contacts manager page, the user is shown the below page with notification fields enabled for edit. All other fields are greyed out. (Username and password will not be shown on this page).



Scenario 2:
When a primary user clicks on the edit icon of a secondary user, the user is shown the below page with username and password(masked) . The user will be able to edit all fields including username and password and the new field "user access". On clicking Save, the user is redirected to main contacts manager page.



Scenario 3:
When a user clicks on the edit icon of their own profile on the contacts manager page, the user is shown the below page with an additional section on the top to change username and password and submit. The user may be redirected to this page when

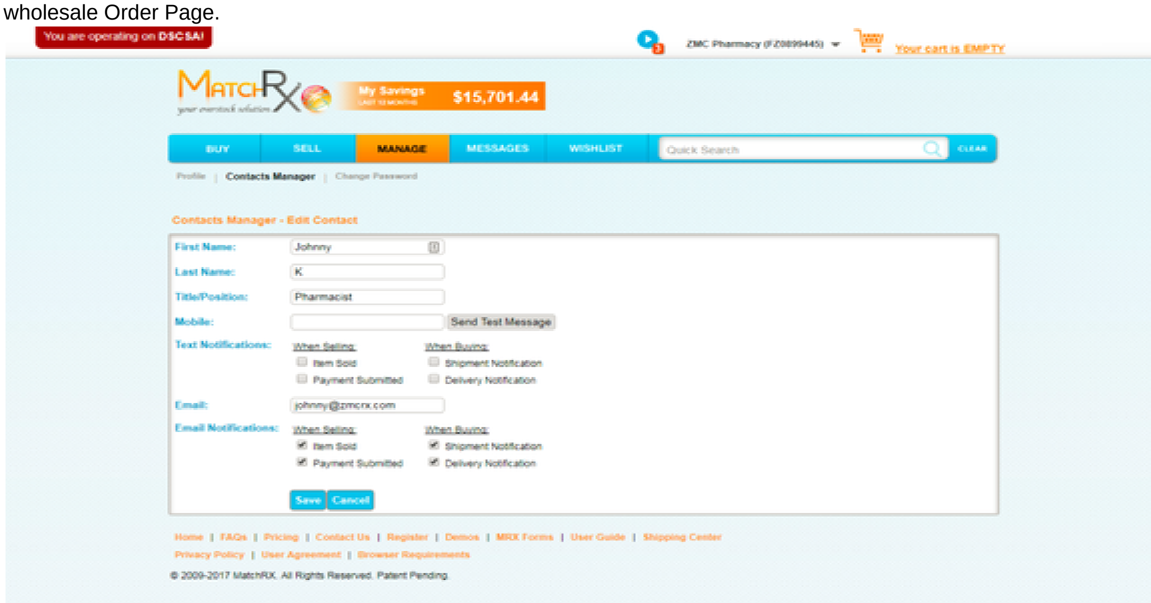
a. MRX 2.0 user is logging in MRX 3.0 for the first time (US 4 - Single Sign on - MRX2.0 transition)
b. A newly approved member is clicking on the link sent to their email (US 4 - Single Sign on - Approved member registration)
c. An invited user is clicking on the link sent to their email. (Invited user registration)

In all the above cases, the information should be prepopulated whenever available in MatchRX DB. Refer to US 4 - Single Sign on - DF_Forgot Password to know more about username and password requirements. The user name has to be unique within a DEA.

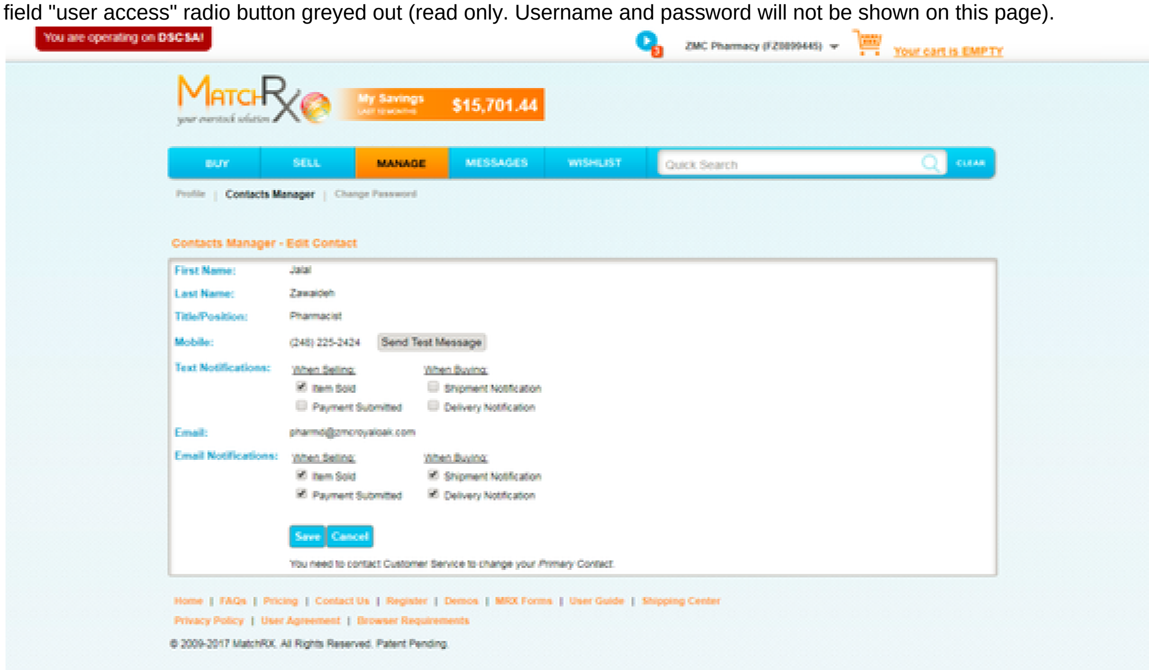
DEA #: *(prepopulated & non editable. This field is removed for VM wholesaler)*
Update username: *(current username prepopulated and editable)*
Current password:
New password: *Format instructions*

Confirm new password:
Password strength:

If the user is a primary user, then the user can edit all fields except DEA #, first name,, last name, title and primary user check box. If the user is a secondary user, the user will only be able to edit all fields except DEA # and primary user check box. If the user is in MRX 3.0 and clicks Save, the user is redirected to MRX 3.0 Buy Page or MRX 3.0 Order page based on landing rules in US 4 - Pharmacy Login Step 10. If the user is in VM Buyer and clicks Save, the user is redirected to VM Buy Page. If the user is in VM wholesaler and clicks Save, the user is redirected to VM wholesale Order Page.



Scenario 4:
When a secondary user clicks on edit icon of any other user other than themselves, the user is shown the below page with all fields including new field "user access" radio button greyed out (read only. Username and password will not be shown on this page).

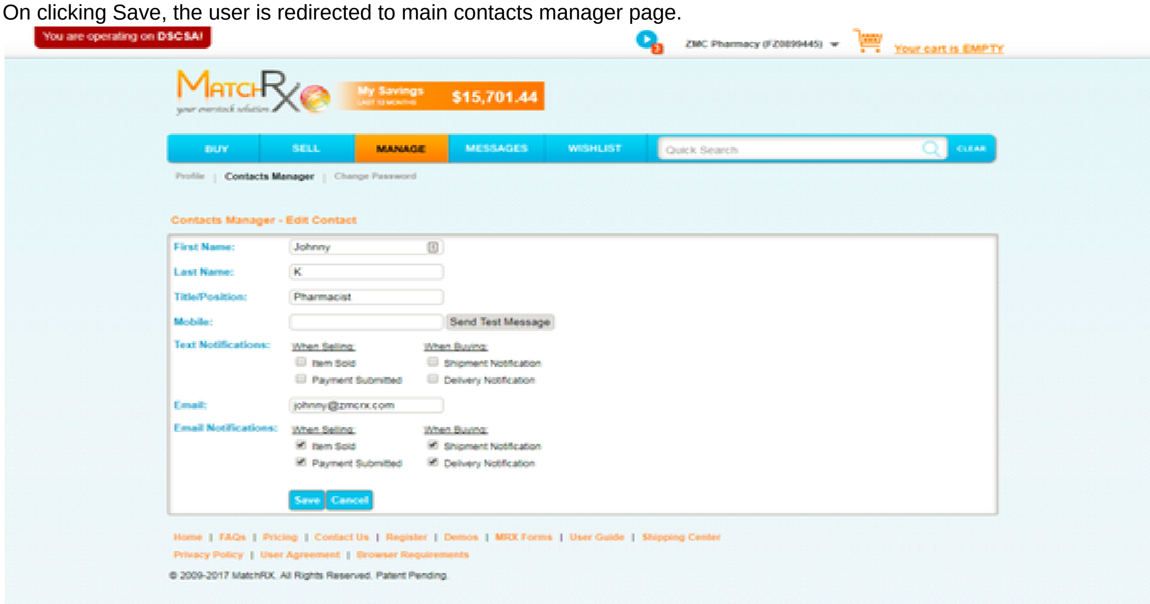


Scenario 5:
When a primary user clicks on the edit icon of a finance or no access user, the user is shown the below page with username (empty) and password(empty) and notification fields (text and email) greyed out. The user will be able to edit the new field "user access". The primary user

should be able to convert a finance user or no access user into primary or secondary user by selecting the "user access" radio button. If primary or secondary user radio button is selected, the email address, username and password fields are mandatory and email should be sent to the edited user to join the website.

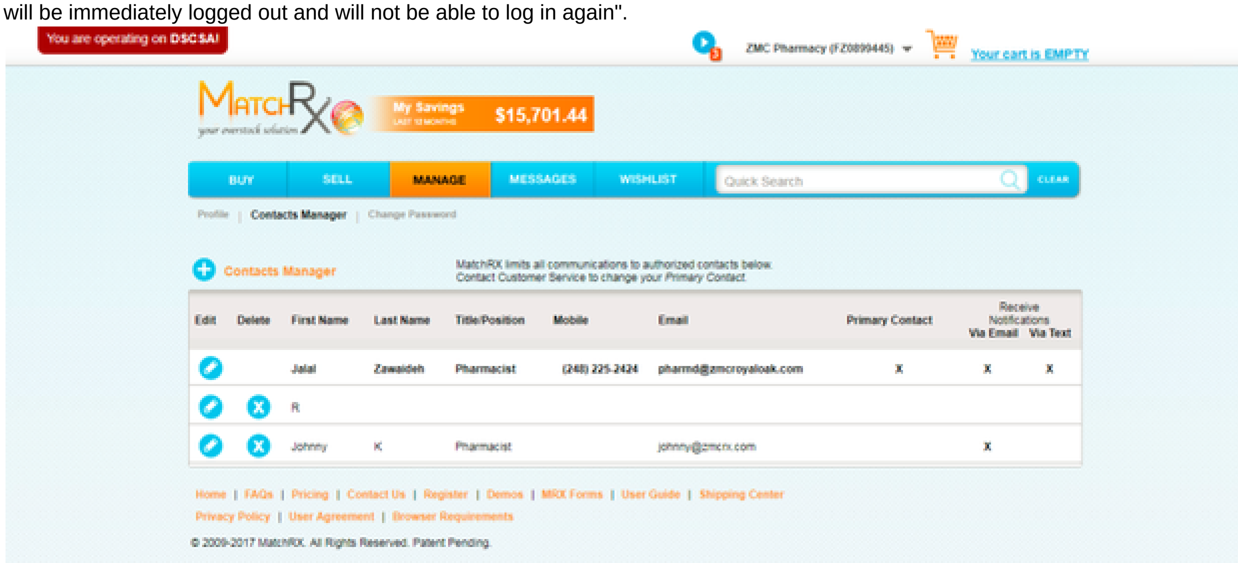
If the primary user selects the user access as finance or no access, only first name, last name, title is mandatory field. Mobile and email are optional field. The notification fields (text and email), username and password will be greyed out.

On clicking Save, the user is redirected to main contacts manager page.



Delete user

Primary users can delete all users. Only secondary users can delete their own profile.
If the user clicks on "X" icon on the contacts manager page, the system should show a warning message that "Are you sure you want to delete this contact?" If the user is deleting their own profile, then the message should be "Are you sure you want to delete this contact? Please note you will be immediately logged out and will not be able to log in again".



BR_Notifications

On the website, the edit contact page will have the below grid with check boxes to manage email and SMS notifications.

	Order activity - Buyer	Delivery Notification - Buyer	Order activity - Seller	Payment Notification - Seller	Wishlist
Email	☐	☐	☐	☐	

SMS	☐	☐	☐	☐	Disabled

Each notification type will need to have an info icon or question mark icon with the following messages on mouse over.

Order Activity - Buyer: "*Notice regarding order revisions, cancellations, and shipment/tracking notifications.*"

Delivery Notification - Buyer: "*Notice that an order has been delivered to your pharmacy*."

Order Activity - Seller: "*Notice of a sale, buyer cancellation, or revision acceptance.*"

Payment Notification - Seller: "*Notice that an order has been accepted by the buyer and funds transferred to the seller.*"

The below table explains the triggers for each notification

Notification type	MRX 3.0 Mobile and Web Trigger	VM Buyer Web Trigger	VM Wholesaler Web Trigger
Order Activity - Buyer	1. Seller Canceled Order - Notification to buyer that seller has canceled order 2. Buyer Modified Order - Notification to buyer that seller has modified original order and awaiting approval/cancellation. 3. Buyer Order Confirmation - Notification to buyer that seller has shipped order, includes tracking number and notice that funds will be pulled from buyers bank account (ACH Debit)	1. Seller Canceled Order - Notification to buyer that seller has canceled order 2. Buyer Order Shipment Confirmation - Notification to buyer that seller has shipped order, includes tracking number and notice that funds will be pulled from buyers bank account (ACH Debit) or or credit card has been charged. 3. Buyer Order confirmation - Notification to the buyer that the order has been successfully place on the website	
Delivery Notification - Buyer	1. Buyer Verification of Order - Notification to buyer that order has been delivered. Buyer instructed to log in and confirm receipt of items		
Order Activity - Seller	1. Seller Posting Sold - Notification to seller of new order to fulfill 2. Buyer Canceled Modified Order - Notification to seller that buyer has rejected modified order 3. Seller Reconfirm Order - Notification to seller that buyer has accepted modified order		1. Seller Posting Sold - Notification to seller of new order to fulfill
Payment Notification - Seller	1. Seller Sale Complete - Notification to seller that buyer has received and accepted items and funds will be pushed to sellers bank account (ACH Credit)		
Wishlist *(emai l only options)*	1. Wishlist reminder is an email sent at 9 AM EST once every day. By default, it is enabled for email. Wishlist emails are sent only when items in the user's wishlist are available for sale in the marketplace when the email is triggered.		

Payment Section (Available for all members including MRX 3.0, VM buyer or VM wholesaler)

Banking Information: *(Read only)* (When a primary user is in VM Buyer application, the user will have a check box to control the visibility of ACH info in checkout page of the VM Buyer application. Only primary user can edit this checkbox. By default, this option will be enabled meaning the users of the pharmacy will be able to use ACH when purchasing on the VM Buyer application. For secondary users, the checkbox will be read only. This check box will not be visible in MRX 3.0 and VM Wholesaler. The text next to the check box will be "Allow ACH". Default value will be checked.)
Bank name *(empty if not available – empty is only possible for members that are VM buyers only)*
Account Number: *******1234 (only last 4 digits should be shown, empty if not available)*

Checkbox to allow ACH payment in Vendor Marketplace (not available if account number is blank):

Credit Card Information (The credit card is only accepted on Vendor Buyer Marketplace)**:** (Available only for members that are both MRX 3.0 and VM buyers, or just VM buyer. This sub-section should not be visible for VM wholesaler and for users in MRX 3.0 application even if the user has VM buyer access.)

Adding credit card:

Only primary users will be able to add. A pharmacy (not users) can save up to five credit card at a time. While checking out from shopping cart, user will be able to use a credit card that is not saved .If the user has less than 5 saved, the user can decided to save that card on file for future use. If the user has 5 credit cards already saved, the user will not be able to save the new card. While checking out of shopping cart, the user will also be able to use the saved credit card. While adding and editing, the following fields should be displayed. All fields (except check box & nickname) are mandatory

Full Name as it appears on the card:

Card Number:

Expiry date (mm/yy):

~~CVV:~~

Credit card nickname (50 varchar):

~~*Billing Address* Section~~

~~First Name:~~

~~Last Name:~~

~~Check box - Click here if Billing Address is sames as Pharmacy Mailing Information (When user checks this box, the system should prepopulate all the below fields in this section with the Pharmacy mailing address information and allow user to edit. Un-checking and rechecking the box should again prepopulate all the below fields in this section with the Pharmacy mailing address information.)~~

~~Address 1:~~

~~Address 2:~~

~~City:~~

~~State (drop down):~~

~~Zip Code:~~

~~Phone Number:~~

Default (checkbox)(this card will be the default card on checkout page) :

The following credit card providers should be allowed:

VISA

MasterCard

American Express

Discover

Editing/Deleting Cards

Only primary users can set a card a default, edit and delete cards. Only last 4 digits of the credit card number will be shown. When deleting, the system has to shown a warning message "Are you sure you want to delete the card? Yes / Cancel " requesting the user to confirm the deletion.

Display credit cards

Credit card number: ending in 1234 (only last 4 digits should be shown)

Credit card provider: (e.g. VISA)

Expiry date:

Credit card nickname:

Full name on the card:

Secondary and Primary user will be able to view the above information both on this page and checkout page.

Usage of Credit cards

Secondary users can use the saved credit card in checkout. On checkout page, secondary user can use a non saved credit card but cannot save it to their profile.

Primary users can use the saved credit card in checkout . On checkout page, primary user can use a non saved credit card and save it to their profile as long as the number of card do not exceed 5.

VM Shipping Address (visible only if the member is in VM buyer application or in VM Wholesaler application)

A user will be able to save up to five shipping address. A user will be able to edit, delete, update or add the shipping addresses except Shipping address 1.

Shipping address 1 *(same as shipping address found in pharmacy information and it is non-editable)*

Address Nickname: Default *(prepopulated)*
Shipping Address 1
Shipping Address 2 (optional)
Shipping City
Shipping State
Shipping Zip Code
Phone

Shipping address 2
Address Nickname:

C/o

Shipping Address 1
Shipping Address 2 (optional)
Shipping City
Shipping State
Shipping Zip Code
Phone

Pharmacy Settings

Removed

Reports

Moved to the left menu as a separate menu option

Log out

Moved to the left menu as a separate menu option. When a user clicks on logout, the user should be logged out of all applications including VM buyer.

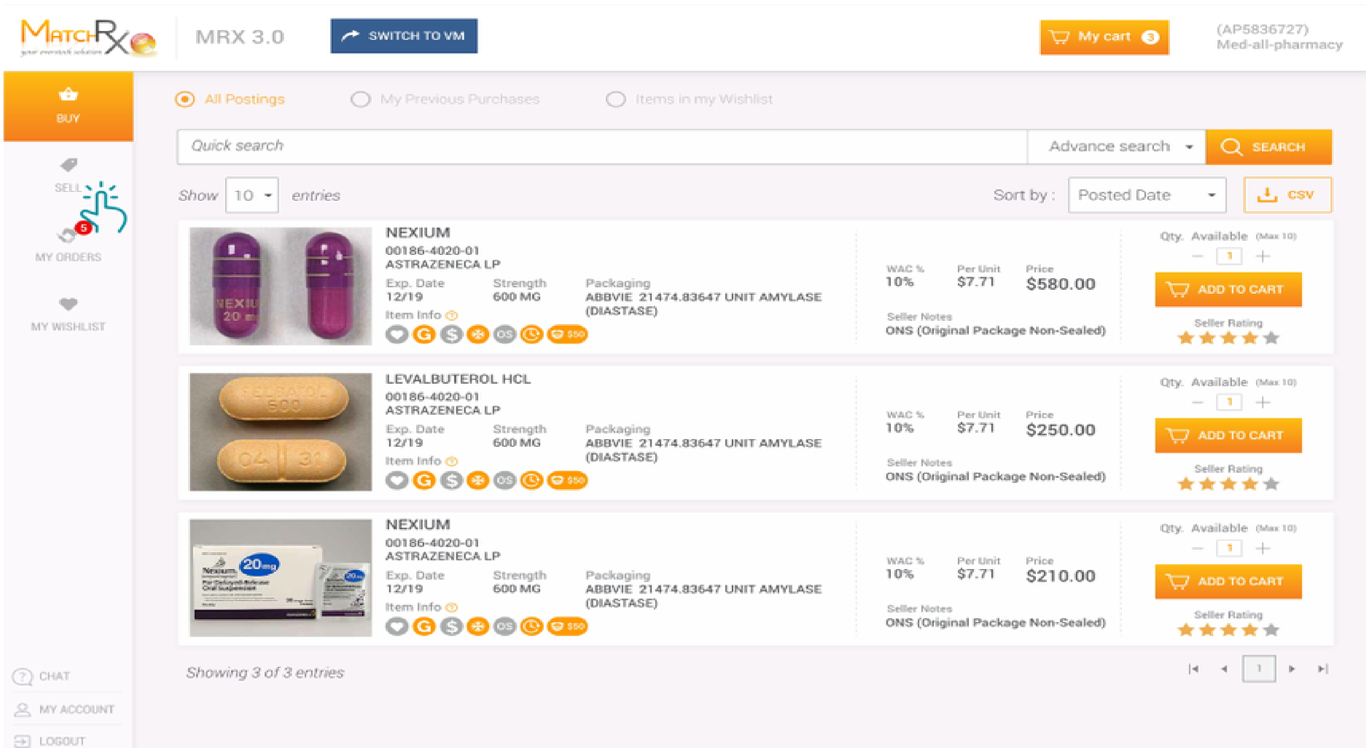
Acceptance Criteria:

- Once a user has been approved a member:
    - A notification email with link is sent to primary email address
    - Link in the email should redirect to the Contacts Manager - Edit contact page
    - New primary user should be able to update profile but cannot change first name, last name, and title
- A user logged in as a Primary user should have the:
    - Ability to update own profile
        - Cannot change first name, last name, and title

- Ability to add new primary, secondary user, finance user and no access user
  - Ability to delete a user profile
  - Ability to edit other user's profile
- A user logged in as a secondary user should have the:
  - Ability to update own profile
  - ability to delete own profile
- Primary or Secondary user can add additional shipping addresses
  - Shipping address #1 (default) cannot be modified or deleted.

Screen Prototype

1. Menu



Test Data Requirement

1. Pharmacy member information table to populate pharmacy information page
2. Pharmacy users table to test contacts manager
3. VM wholesaler users table to test contacts manager
4. Registered pharmacy member table to check change password and username
5. Registered VM wholesaler table to check change password and username
6. Zeamster API to add and delete CC
7. Shipping address table to check VM shipping address page

US 7 - My Savings

WBS #								
	Key	**Summary**	**Updated**	**Due**	**Assignee**	**Status**	**Resolution**	**Sprint**
	MHX-1368	Web - UAT Bugs - Sep 21	Sep 26, 2018 23:44		Ramprakash	OPEN	Unresolved	
	MHX-1367	UI - UAT Bugs - Sep 21	Sep 24, 2018 12:49		Ramprakash	REWORK IN PROGRESS	Unresolved	
	MHX-1366	Mobile - UAT Bugs - Sep 21	Sep 27, 2018 13:00		Ramprakash	OPEN	Unresolved	
	MHX-1365	SF - UAT Bugs - Sep 21	Oct 04, 2018 05:04		Swapna.Patnaikuni	REWORK IN PROGRESS	Unresolved	
	MHX-167	WBS 21: PHP My Savings	Jun 11, 2018 10:36		rajasekar.jeyakumar@htcindia.com	IN QA	Unresolved	Sprint 11
	5 issues							
Document status	APPROVED							
Document owner	Raghul Manoharan							
UI Developer								
Developers								
QA								

Table of Contents

ser Story

As a MRX 3.0 website, I want to display how many dollars the user has saved by using MRX 3.0 over a defined period of time so that I can motivate the user to save more.

End Objective:	To provide savings information to the registered users of the website
User/Actor:	Primary users and Secondary users
Program Type:	Webpage
Trigger:	N/A
Related User Story:	
Related WBS #:	21

Related WBS description

21	My savings within last N months. [Global Setting for the MRX admin to choose time period as needed]Calculates pharmacy's up-to-date savings (Value of Sold items + WAC savings of bought items) for last N months

Business Rules

BR_Front Office

"My Savings" is calculated as follows:
(Value of Sold items + WAC savings of bought items) during the last N months including current month.

N = Number of months used for the calculation which will be set by the MRX Back office user (BR_Back Office)

If N is 12, on Feb 15 2018 – 9:00 AM, the savings will be calculated for the period Feb 16, 2017 to current date and time which is Feb 15 2018 – 9:00 AM. The calculation will only include orders with order status as "complete" and order date within the above-mentioned date range.

Value of sold items = Product total which can be found at Manage - > Selling activity -> Sales history -> Product total

WAC savings of bought items = [(Product cost /(1-WAC%)) – Product cost] * Qty bought

Product cost and "[Product cost /(1-WAC%) – Product cost]" can be found in Pearl -> Marketplace - > Order - > Line item detail

When WAC is not available, use AAWP. If both are not available, ignore that specific line item for calculation. E.g. If an order has 2 products and one of the products doesn't have WAC or AAWP, ignore only that product for "My savings" calculation.

The following are not included in the calculation

- Shipping cost
- FedEx Insurance
- MatchRX fee
- Match Money

The "My Savings" information has to be displayed on all pages after a primary/secondary user has logged into the MRX 3.0 application. Copy below should look similar to the attached image in Screen prototype.

"My Savings
Last "N" Months"

Maximum field size is $x,xxx,xxx.xx

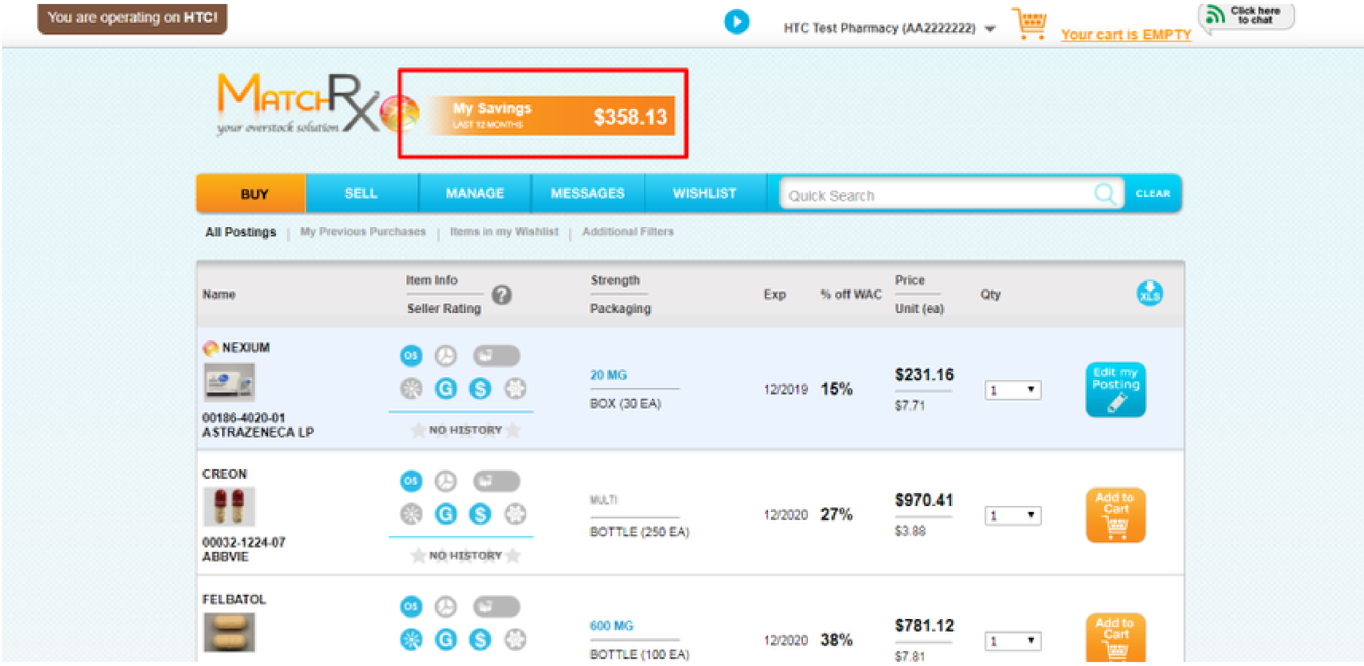
BR_Back Office

The value of N cannot be set specific to a member or group of members, instead it is a global setting for all members. It should be stored in config file so that a developer can easily change the value.

Acceptance Criteria

1. Calculation results display at the top of every page after user login
2. Format is $X,XXX.XX
3. Verify calculation results using test data

Screen Prototype



Test Data Requirement

1. Orders table with fields for WAC prices, product costs, buyer and seller to calculate "My savings"

US 8 - MRX 3.0 & Mobile - Post an item

WBS #

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-116	WBS 135: Mobile Post [display a table to compare pricing...]	Mar 07, 2018 07:45		Maguesh Balakrishnan	IN STAGING	Unresolved	Sprint 5
MHX-115	WBS 134: Mobile Post [upload actual images of the item...]	Feb 12, 2018 18:29		Maguesh Balakrishnan	PROD READY	Unresolved	Sprint 3
MHX-114	WBS 133: Mobile Post [shipping methods ...]	Mar 07, 2018 07:41		Maguesh Balakrishnan	IN STAGING	Unresolved	Sprint 4
MHX-113	WBS 132: Mobile Post [pricing methods for the user...]	Aug 22, 2018 11:14		Maguesh Balakrishnan	PROD READY	Unresolved	Sprint 4
MHX-112	WBS 131: Mobile Post [NDC Verification through Medi-Span ...]	Aug 22, 2018 11:13		Maguesh Balakrishnan	PROD READY	Unresolved	Sprint 4
MHX-111	WBS 130: Mobile Post [information which corresponds to scanned BarCode or QR code...]	Feb 12, 2018 18:28		Maguesh Balakrishnan	PROD READY	Unresolved	Sprint 3

	MHX-110	WBS 129: Mobile Post [user should be restricted or allowed to make posting and type of posting...]	Feb 12, 2018 18:27	Maguesh Balakrishnan	PROD READY	Unresolved	Sprint 3
	MHX-96	WBS 30: PHP Post [display a table to compare pricing...]	Mar 07, 2018 07:38	Divyalakshmi	IN STAGING	Unresolved	Sprint 4
	MHX-95	WBS 29: PHP Post [upload actual images of the item...]	Mar 07, 2018 07:38	Rajeswari M [X]	IN STAGING	Unresolved	Sprint 4
	MHX-94	WBS 28: PHP Post [shipping methods ...]	Mar 07, 2018 07:38	Poovarasan	IN STAGING	Unresolved	Sprint 4
	MHX-93	WBS 27: PHP Post [pricing methods for the user...]	Mar 07, 2018 07:38	Varun Sankaranarayana	IN STAGING	Unresolved	Sprint 4
	MHX-92	WBS 26: PHP Post [NDC Verification through Medi-Span ...]	Mar 07, 2018 07:38	rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 4
	MHX-91	WBS 25: PHP Post [information which corresponds to scanned BarCode or QR code...]	Mar 07, 2018 07:38	Rajeswari M [X]	IN STAGING	Unresolved	Sprint 4
	MHX-90	WBS 24: PHP Post [user should be restricted or allowed to make posting and type of posting...]	Mar 07, 2018 07:38	rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 4
	14 issues						

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered user of MRX 3.0, I want the ability to post an item on web and mobile app so that I can sell

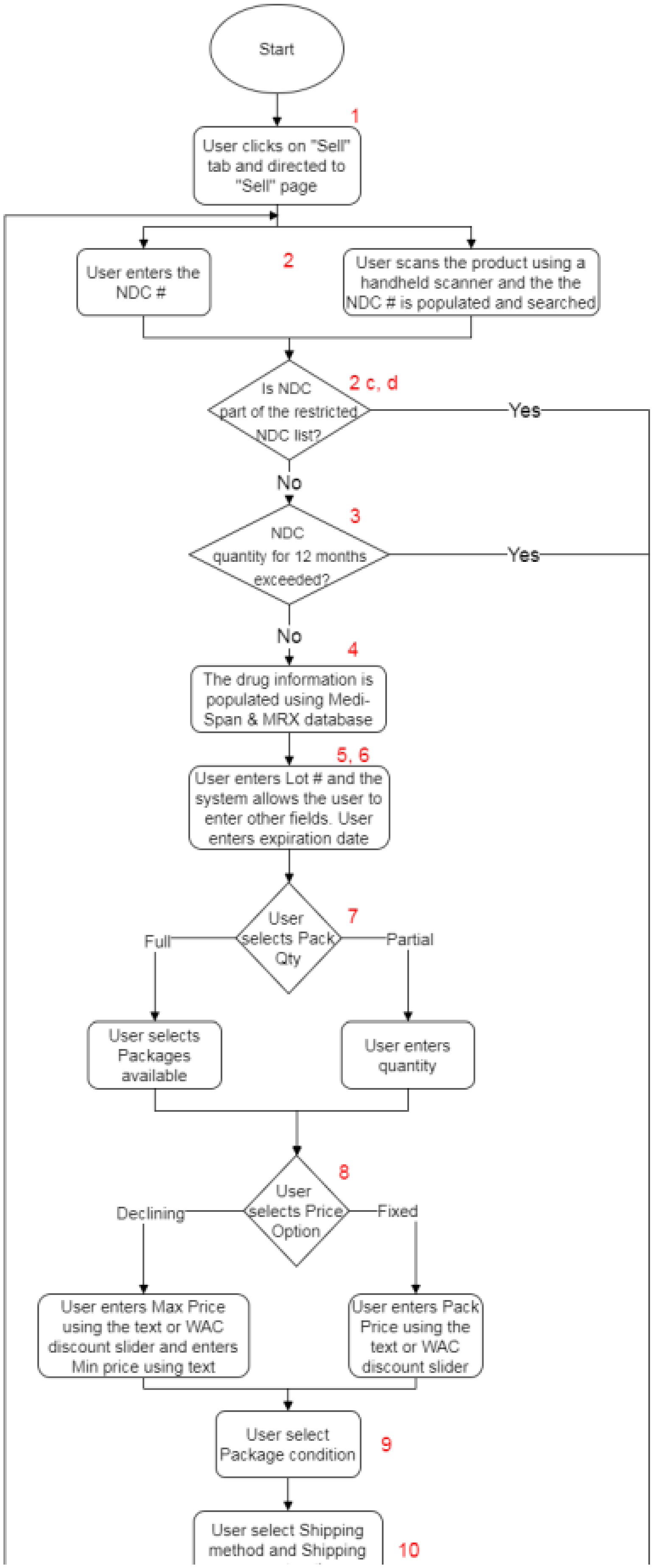
End Objective:	To provide a page for registered users to post their item to sell
User/Actor:	Primary users and Secondary users of MRX 3.0
Program Type:	Webpage with Form & Mobile App
Trigger:	Click on "Sell" Tab
Related User Story:	
Related WBS #:	24 - 30, 129 - 135

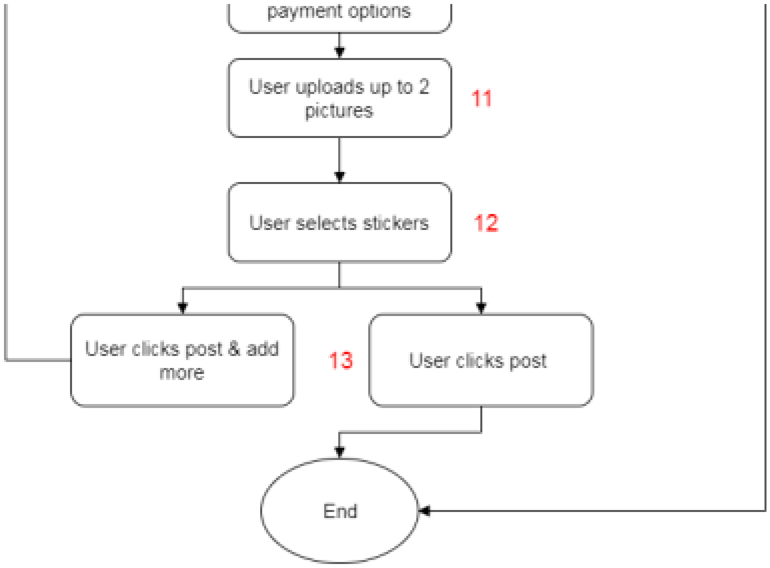
Related WBS description

24	Based on pharmacy's state, the user should be restricted or allowed to make posting and type of posting (e.g. partial quantity). Refer 3.0 BR 1.2As a pharmacy user, I want a "Sell" button to display a form in which I define my posting:- NDC Number;- Lot Number;- Expiration Date;- Pack Quantity (Full / Partial (EA));- Packages Available [unavailable if Pack Quantity = Partial];- Price Option: Fixed; Declining;- Pack Price (decimal/money);- WAC Discount (in MRX 2.0: slider);- AAWP discount - Package condition (Original package - sealed / Original package - non-sealed (radio button); Torn package label (check-box); Other (check-box); description (string));- Do you want to pay for shipping (Yes (for orders $200 or more) / Yes (for items $50 or more) / No (buyer pays for shipping)Note - If current WAC is not available, formula will look at current AAWP from Medispan. If AAWP is not available, logic will look back at the last price in Medispan history for WAC. If NDC has been retired, we should display to the seller during posting that it is retired and may not have current pricing.
25	information which corresponds to scanned BarCode or QR code after scanning from mobile(for app)/handheld scanner should be auto-populated for item posting form.The data is auto-populated from Medi-Span.
26	NDC Verification through Medi-Span providing:· Product Name· Generic Name· Image· Dose form· Strength· Proprietary drug identifiers, packaging· Pricing – AWP, WAC, AAWP· Ingredients· Storage· Labeler/Mfg· Pkg Quantity
27	Two pricing methods for the user to choseFixed: The price should be a minimum of 10% below prevailing WAC.Declining: The Seller sets both a maximum and minimum price for the prescription drug(s). The prescription drug price will first appear at the maximum price and decrease incrementally every week by 10% of the difference in the prices provided. This will continue until the prescription drug(s) sell or the minimum price is reached, whichever comes first. For example, if a Seller posts a prescription drug on a declining basis at $500 maximum and $400 minimum ($100 difference), the price will decrease by $10 each week until the drug sells or the minimum price is reached.In addition, when the price updates the posting should display on the first page again (as if it was newly posted).The % change each week is a hardcoded rule - 10% of the difference between max and min over a 10 week period.
28	A s a pharmacy I want to be able to choose 1 of 3 shipping methods if seller decides to pay for shipping. If buyer is paying, seller can only choose ground. Buyer, at time checkout, can upgrade ship method if desired at buyers expense.:- FedEx GroundIf seller paid shipping:- FedEx Express (2-Day);- FedEx Express (Priority Overnight).For refrigerated items, FedEx Express (Priority Overnight) to be automatically chosen and I want additional information notice about FedEx Express (Priority Overnight) shipment to be displayed.
29	Ability for the user to upload actual images of the item. (needs BO approval for the user uploaded images.) Before approval, the posting will be live with stock image. Post approval, posting will be updated with the approved. User should be able to see uploaded photos as preview:[more than one -> gallery view]. # of similar items posted; Product name; Strength; Storage; Packaging; Form (right side in the current state of 2.0 which is pre-populated from Medi-span after NDC is entered.).Stock image will always be the default when viewing items in the marketplace. A notification next to the image will indicate there are actual pictures to view when clicking on the stock image.
30	As a pharmacy user, when adding a posting, I want the system to display a table to compare pricing (4 rows (including header) x 4 columns (including row name)):- Columns: Your price; Minimum; Maximum. Rows: Price per unit; WAC discount; Expiration date.- Columns Minimum and Maximum show data only if total number of posts of the same NDC is >= 1.

129	Based on pharmacy's state, the user should be restricted or allowed to make posting and type of posting (e.g. partial quantity). Refer 3.0 BR 1.2 As a pharmacy user, I want a "Sell" button to display a form in which I define my posting: - NDC Number; - Lot Number; - Expiration Date; - Pack Quantity (Full / Partial (EA)); - Packages Available [unavailable if Pack Quantity = Partial]; - Price Option: Fixed; Declining; - Pack Price (decimal/money); - WAC Discount (in MRX 2.0: slider); - AAWP discount - Package condition (Original package - sealed / Original package - non-sealed (radio button); Torn package label (check-box); Other (check-box); description (string)); - Do you want to pay for shipping (Yes (for orders $200 or more) / Yes (for orders $50 or more) / No (buyer pays for shipping) Note - If current WAC is not available, formula will look at current AAWP from Medispan. If AAWP is not available, logic will look back at the last price in Medispan history for WAC. If NDC has been retired, we should display to the seller during posting that it is retired and may not have current pricing. The UX should a logical flow of data capturing from the user in not more than 3 screens to complete the posting.
130	information which corresponds to scanned BarCode or QR code after scanning from mobile(for app)/handheld scanner should be auto-populated for item posting form. The data is auto-populated from Medi-Span.
131	NDC Verification through Medi-Span providing: · Product Name · Generic Name · Image · Dose form · Route of administration · Strength · Proprietary drug identifiers, packaging · Pricing – AWP, WAC, AAWP · Ingredients · Storage · Labeler/Mfg · Pkg Quantity
132	Two pricing methods for the user to chose Fixed: The price should be a minimum of 10% below prevailing WAC. Declining: The Seller sets both a maximum and minimum price for the prescription drug(s). The prescription drug price will first appear at the maximum price and decrease incrementally every week by 10% of the difference in the prices provided. This will continue until the prescription drug(s) sell or the minimum price is reached, whichever comes first. For example, if a Seller posts a prescription drug on a declining basis at $500 maximum and $400 minimum ($100 difference), the price will decrease by $10 each week until the drug sells or the minimum price is reached.
133	A s a pharmacy I want to be able to choose 1 of 3 shipping methods if seller decides to pay for shipping. If buyer is paying, seller can only choose ground. Buyer, at time checkout, can upgrade ship method if desired at buyers expense.: - FedEx Ground If seller paid shipping: - FedEx Express (2-Day); - FedEx Express (Priority Overnight). For refrigerated items, FedEx Express (Priority Overnight) to be automatically chosen and I want additional information notice about FedEx Express (Priority Overnight) shipment to be displayed.
134	Ability for the user to upload actual images of the item. (needs BO approval for the user uploaded images.) Before approval, the posting will be live with stock image. Post approval, posting will be updated with the approved. User should be able to see uploaded photos as preview:[more than one -> gallery view]. # of similar items posted; Product name; Strength; Storage; Packaging; Form (right side in the current state of 2.0 which is pre-populated from Medi-span after NDC is entered.)
135	As a pharmacy user, when adding a posting, I want the system to display a table to compare pricing (4 rows (including header) x 4 columns (including row name)): - Columns: Your price; Minimum; Maximum. Rows: Price per unit; WAC discount; Expiration date. - Columns Minimum and Maximum show data only if total number of posts of the same item is >= 1.

Flow Chart


Start
1
User clicks on "Sell" tab and directed to "Sell" page
User enters the NDC #
2
User scans the product using a handheld scanner and the the NDC # is populated and searched
Is NDC part of the restricted NDC list?
2 c, d
Yes
No
NDC quantity for 12 months exceeded?
3
Yes
No
4
The drug information is populated using Medi-Span & MRX database
5, 6
User enters Lot # and the system allows the user to enter other fields. User enters expiration date
User selects Pack Qty
7
Full
Partial
User selects Packages available
User enters quantity
User selects Price Option
8
Declining
Fixed
User enters Max Price using the text or WAC discount slider and enters Min price using text
User enters Pack Price using the text or WAC discount slider
User select Package condition
9
User select Shipping method and Shipping
10



| **Preconditions**|

Application: MatchRX 3.0 **Navigation**: User clicks "Sell Tab" **User Status:** Registered and Active primary/secondary MRX user

Basic Flow

1. When the user clicks the sell page, the user is redirected to the posting page with form fields mentioned in *DF_Posting Form* with only NDC field enabled. The system checks the "State" of the member. Based on the state (*BR_State List*), the one the following rules will be followed
    a. A state may be unrestricted and allow the sale of sealed & unsealed bottles. In that case, the member may be able to choose these options "Pack Qty – Partial", "Pack Qty – Full", "Package condition – Original package – Non-sealed" and "Package condition – Original package –sealed".
    b. A state may not allow the sale of non-sealed bottles which will disable "Pack Qty – Partial" and "Package condition – Original package – Non sealed" and default to "Pack Qty – Full" and "Package condition – Original package –sealed"
2. When a NDC is typed or scanned using a handheld scanner (When scanning, the system should immediately start searching and user should not be required to click the search button.),
    a. The system validates if the NDC entered is a valid NDC. If yes, proceed to next step. Else display the message *BR_Error Message* and back to start of step 2.
    b. The system checks if the NDC entered was bought by the member in the last 90 days including current date. If no, proceed. Else display the message *BR_Error Message* and process ends.
    c. The system checks if the NDC entered is in the restricted NDC list maintained by MRX in the database (*BR_MRX Restricted NDC*). If not found in the restricted list, then proceed. Else display the message and process ends.
    d. The system connects with Medi-span table and checks if the NDC entered is classified as one of the Schedule I-IV or REM drugs by NDC. If not, proceed. Else display the message and process ends. (*BR_Medispan Restricted NDC)*
    e. The system checks if the NDC entered is in the "full only" list maintained by MRX in the database *(BR_Full Only NDC)*. If yes,, disable partial option in the pack quantity field. Else, proceed.
    f. The systems retrieves the "Storage" information through Medi-span table. If the storage value is "Refrigerated" or "Frozen", then the system should default the "shipping method" to "Priority Overnight", disable the other two shipping methods and display the message "Frozen or Refrigerated items, must be shipped Mon – Thu via Fedex Priority Overnight." and proceed. Else proceed.
    g. The system checks if a full Non-sealed quantity of this NDC is currently listed or has been sold in the past 90 days including current date. If yes, disable "Original Package – Non-sealed", display message *BR_Open bottle* and proceed. Else proceed.
    h. The system checks if a partial Non-sealed quantity of this NDC is currently listed or has been sold in the past 90 days including current date. If yes, disable "Partial", display message *BR_Open bottle* and proceed. Else proceed.
3. The system should limit the quantity of a single NDC during a 12 month period to 15 for brands and 25 for generics. The system should validate based on *BR_Quantity Sold*. If the NDC is allowed to be posted for sale, proceed to next step, if applicable with a relevant message next to the "Package Available" field. Else, display the message and process ends.
4. The fields mentioned in *DF_Product Information* are retrieved from Medispan and MRX database and displayed on the screen. Lot number field and expiration date field are also enabled.
5. The user enters the lot number which is a unique number printed on the item label by the manufacturer. The rest of the fields are enabled.
6. The user enter the expiration date. The date has to be at least 1 month ahead of current month (e.g. In Oct 2017, the expiration has to be Nov 2017 or later). If yes, proceed. Else display error message *"Date entered is EXPIRED. Expired items cannot be sold in the marketplace."*
7. Package Qty – The default value is always "Full". A member might be restricted based on the rules mentioned in Step 1. If the member chooses
    a. Full (default) – All fields are enabled. The maximum value in the "Packages Available" field is based on *BR_Quantity Sold.* If the

member selects more than 1 for "Packages available", then the system should disable "Original package – Non sealed" in "Package Condition" field with a message "NOTE: MatchRX policy limits the sale of any full unsealed NDC to one (1) every 90 days."
   b. Partial - When the user clicks on radio button or the quantity field of partial option, the partial option should be selected and rest of the below fields are disabled until the member enters a quantity less than or equal to max value. The Packages available field is defaulted to 1 and always disabled for edit. The package condition field is defaulted to "Original package – Non-sealed" and the option "Original package –sealed" is greyed out.
8. Price Option: The member can choose one of the two options
   a. Fixed (Default) - A member can choose to type the price or use the WAC discount slider. If a member updates WAC discount, the price field is automatically updated and vice-versa. Minimum price should at least be is $2.00 and maximum price is 90% of WAC value (provided by Medi-span at the time of posting). When WAC is not available, maximum price is 75% of AAWP. The comparison table is automatically updated as the price is entered. If the pack price entered is less than $50, then "Yes (for items $50 or more)" option in the "Do you want to pay for Shipping?" is disabled.
   b. Declining: When user selects declining option, the "Pack price" value is copied to "Max (Current)" and user will be able to edit. The "Min" is defaulted to empty. Minimum price should at least be $2.00 and maximum price is 90% of WAC value (provided by Medi-span). When WAC is not available, maximum price is 75% of AAWP. The minimum price must be at least 20% less than Max price. If the value entered is not less than 20%, display the message, "The minimum price must be at least 20% less than Max price. Enter a value not to exceed {value}". The comparison table is automatically updated as the price is entered based on the Max value. The WAC discount slider is used only for Max value. If the Min price entered is less than $50, then "Yes (for items $50 or more)" option in the "Do you want to pay for Shipping?" is disabled. If the member switches from "Declining" to "Fixed" and then back to "Declining", then min price previously entered by the member has to be displayed and not defaulted to empty.
9. Package condition - The default value is always "Original Package - Sealed". A member might be restricted based on the rules mentioned in Step 1 and Step 2. When there are no restrictions (only possible when pack quantity is "full" and packages available is "1"), the user may choose:
   a. Original Package – Sealed: If the current selection is "Original Package – sealed" and the user selects "Partial" for "pack quantity", the selection should default to "Original Package – Non-sealed". If the user switches back to "full", then the user is provided with the message "Please select package condition" and has to select the "Package condition". The system doesn't default to either options.
   b. Original Package – Non-sealed: When selected, the system should disable (grey out) the packages available field which should be 1.
   c. Torn package label, Sticker/Glue residue, "X" on container, Writing on container, Other: Optional check box
   d. Seller Note: This field should be disabled by default. If the user checks one or more above check boxes, the field should be enabled. If "other" is checked, the field should become mandatory.
      Message when clicked on Other's text field "Please describe the package condition"
10. Do you want to pay for shipping? – The default value is always "No". A member might be restricted based on the rules mentioned in Step 2 and 8. If the member is not restricted based on Step 2 and 8, and chooses:
    a. Yes (for orders $200 or more): All three shipping options are enabled
    b. Yes (for items $50 or more): All three shipping options are enabled. If the pack price for fixed option or the Min/Max price for the declining option is less than $50.00, this option should be disabled. If the member changes the fixed pack price or declining min/max price to below $50 after selecting this option, then the system should automatically change the option to "No".
    c. No (buyer pays for shipping): "Ground" is the default option and other two options are disabled.
11. Pictures: The user will be able to upload up to 2 pictures (BR_Pictures)
12. Stickers (Not applicable for Mobile app): The user selects if the user needs stickers
    Check boxes for sticker with the following message:
    Reminder:
    Place a MatchRX sticker on each posting to quickly identify a MatchRX item on your shelf. If you sell or partially dispense the item, you must update or remove your open posting in MatchRX. Check the box(es) below to order additional stickers
    - MatchRX Stickers
    - Frozen / Refrigerated Shipping Stickers

    If the member selects one or both the options, a ticket has to be created in Salesforce. The back office user has to be notified using Salesforce that the member has ordered stickers. Salesforce should display and enable the user to print the member's DBA and address. The user should be able to manage the ticket lifecycle such as marking it complete or assigning a different user.
13. Post Item / Post & Add more:
    The button is enabled the first time when the price is entered. The button has to be disabled whenever one or more of the above fields are either missing a value or has an incorrect value.
    When disabled, on mouse over, the system has to display the message "There are {number} errors in the form. Please correct to complete the posting."
    Landing page:
    When "Post Item" is clicked, the system redirects the user to the "Buy" page with a pop up "The item was successfully posted".
    When "Post & Add more" is clicked, the system redirects the user to the "Sell" page with empty fields to create a new posting with a message at the top "The item was successfully posted". This message should disappear after 5 seconds.

Data Fields

DF_Posting Form

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks

NDC #	00032-1224-07	Numeric	Empty	M	Text box	The user should be allowed to enter with and without the "-" between numbers. The system should not suggest "-" while the user is typing. Once the user clicks "search" or types enter key on the keyboard, the system should insert the "-". User can also scan the item barcode to enter NDC. Numeric values must be 11 digits with three sections of 5-4-2. If the user enters less 10 digits, the system has to fill with leading zeros as follows E.g. If the user enters 55111-158-10, the system should convert it into 55111-0158-10 If the user enters 50111-459-1, the system should convert it into 50111-0459-01 If the user enter 111-123-1, the system should convert it into 00111-0123-01 if the user enter at least 10 digits like 1234567890, the system should try these combinations 01234-5678-90, 12345-0678-90, 12345-6789-00 If the user enter a NDC with less than 10 digits like 1111231, the system should display an error "This NDC is invalid. Please try again."
Lot Number	ABC123	Uppercase Alphanumeric (min 1, max 12)	Empty	M	Text box	
Serial Number	TBD	Alphanumeric (min 1, max ??)	Empty	O	Text Box	Not to be shown on the website. A placeholder in database table for future use. Drug manufacturers are required to assign a serial number to all products starting in 2019 per the DSCSA. This global standard is still under development. Every package will have a unique serial number that will likely include the NDC and lot number. This will also be accessible through a 2D barcode on the package.
Expiration Date	12/2019	MM/YYYY Calendar	Empty	M	Text box and Calendar selection	Calendar to select the month and year
Pack Quantity	Full	Selection	Full	M	Radio Button	Options: 1) Full 2) Partial
Partial Quantity (EA)	50	Numeric	Empty			Disabled if full quantity is selected. Max should be 1 (one) less than Package size provided by Medi-Span
Packages Available	2	Numeric	1		Dropdown	Disabled if partial quantity is selected
Price Option		Selection	Fixed	M	Radio Button	Options: 1) Fixed 2) Declining Question mark next to Declining should have this text ""The price will first appear at the max price and decrease incrementally every week for 10 weeks by 10% of the difference in the max and min provided, until the Prescription Drug sells/transfers or the min price is reached, whichever comes first.""
Pack Price – Fixed	125.24	Numeric with two decimals	Empty		Text box	Disabled if declining price option is selected. The price should be a minimum of 10% below prevailing WAC. Item must be listed for $2.00 or more. When member enters price such as "123", display it as "123.00". If the member enters "123**.**12", the system should display it as "123**.**12**"**
Pack Price – Declining Max	125.24	Numeric with two decimals	Empty		Text box	Disabled if fixed price option is selected. The price should be a minimum of 10% below prevailing WAC. Item must be listed for $2.00 or more.
Pack Price – Declining Min	75.24	Numeric with two decimals	Empty		Text box	Disabled if fixed price option is selected. The price should be a minimum of 10% below prevailing WAC. Minimum price should be at least 20% less than maximum price. Minimum price must be $2.00 or more.
WAC Discount	50%	Percentage	Based on Pack price – Fixed or Pack Price – Declining Max	M	Slider	Change in the Pack price – Fixed or Pack Price – Declining Max value should change the slider automatically and vice versa. The member should not be able to slide below (less than)10%

Package condition		Selection	Original package – sealed	M	Radio Button, check box and text box	Radio button Original package – sealed (disabled if partial quantity is selected) Original package - non-sealed Check box (Non mandatory fields) Torn package label Sticker/Glue residue "X" on container Writing on container Other Seller Note: (string – 4 character min, 50 character max). This field should be disabled by default. If the user checks one or more above check boxes, the field should be enabled. If "other" is checked, the field should become mandatory. Phone number characters should not be displayed in the marketplace. A string of 7 or more numbers separate by symbols or spaces (other than alphabets) will be considered a phone number and that particular string alone should not be displayed in the marketplace. The item should be posted with the rest of the content. The BO user should be able to allow the string to be displayed in the website. *Message when clicked on Other's text field* "Please describe the package condition"
Shipping payment		Selection	No (buyer pays for shipping)	M	Radio Button	Do you want to pay for shipping? Yes (for orders $200 or more) Yes (for items $50 or more) No (buyer pays for shipping)
Shipping method		Selection	Ground	M	Radio Button	Options: Ground 2-Day (disabled if shipping payment method is "No") Priority Overnight (disabled if shipping payment method is "No") Note: All shipments are insured up to $100 by FedEx. Additional FedEx insurance may be purchased by the seller during seller confirmation.

DF_Product Information

Field Name	**Example**	**Data Type**	**Default Value**	**M/O/R ***	**Control Type**	**Remarks**
Similar items posted	28	Numeric	0	R		Populated immediately after an NDC is entered
Product Name	QUININE SULFATE		Enter a NDC Number	R		Populated immediately after an NDC is entered
Image			Default image			Populated immediately after an NDC is entered
Strength	324 MG		Empty			Populated immediately after an NDC is entered
Packaging	BOTTLE (30 EA)		Empty			Populated immediately after an NDC is entered
Storage	Normal		Empty			Populated immediately after an NDC is entered
Form	CAPS		Empty			Populated immediately after an NDC is entered
Market place comparison table (3 columns - Your Price, Minimum, Maximum)						
Price Per Unit			Empty			If "package_quantity" = 1, then "package_size": (e.g. 5) should be used for calculating price per unit. (e.g. NDC 24208060105) If "package_quantity" > 1, then "package_quantity" should be used for calculating price per unit. (e.g. NDC 23558068421)
WAC Discount			Empty			
Expiration Date			Empty			

M – Mandatory O – Optional R – Read only

Business Rules

BR_State List

In the table US 17 - MRX 3.0 Buy Menu - Pharmacy state restriction, if a particular state do not allow selling of non sealed package within the state and outside the state, the members of that state should not be allowed to post items which are non sealed. The non-sealed button should be disabled and the following message must be displayed "Your state does not allow the sale of non-sealed items""

If members of a particular state is not allowed to sell (both sealed and non sealed), post an item page and My postings page should be disabled. All the live postings from members of that state should be hidden from the marketplace. All open orders in the life-cycle will be allowed to complete. The back office user can cancel an order, if required.

The following message should be displayed when the user click "Sell" button

Selling has been temporarily suspended, please check your email for additional details. Contact customer service at 877-590-0808 or email customerservice@matchrx.com.

BR_Error Message

If the NDC is invalid:
This NDC appears to be invalid. Please re-enter.
If the NDC entered was bought by the member in the last 90 days including current date.
The NDC you are attempting to post was purchased through the marketplace by your pharmacy on ***{DATE}****. Therefore, this NDC is not valid for sale. Please reference Section 5.4 of the MatchRX User Agreement.*

BR_MRX Restricted NDC

This is a list of NDCs maintained in MatchRX DB.
Display the below message when the user tries to post a restricted NDC.
"This is a restricted item and cannot be posted/sold on MatchRX."

BR_Medispan Restricted NDC

The Medispan data provides this information.

Display the below message when the user tries to post a restricted NDC
"Controlled substances are not allowed on MatchRX."

BR_Full Only NDC

This is a list of NDCs maintained in MatchRX DB using Salesforce.
Display the below message when the user tries to post a full only NDC.

"Partial Pack is not allowed for this NDC."

BR_Open Bottle

Limited to selling one partial pack of a NDC within a 90 day period.
Messages:
A partial pack for this NDC already exists as an open posting. Per the MatchRX User Agreement Section 2.8, you are limited to selling one partial pack of a NDC within a 90 day period. Multiple postings of the same NDC as a partial pack is not allowed.

Or

You sold a partial pack of this quantity in the past 90 days. Per the MatchRX User Agreement Section 2.8, you are limited to selling one partial pack of a NDC within a 90 day period. You can post this item as a partial pack on {mm-dd-yyyy}

Limited to selling one full unsealed pack of a NDC within a 90 day period including current date.
Messages:
Per the MatchRX User Agreement Section 2.8, you are limited to selling one full non-sealed item of a NDC within a 90 day period. You presently have one (1) open posting

Or
Per the MatchRX User Agreement Section 2.8, you are limited to selling one full non-sealed item of a NDC within a 90 day period. You have sold one (1) item within this timeframe. Your next available posting date is {mm-dd-yyyy}

BR_Quantity Sold

Per MatchRX policy, the sale of a single NDC during a 12 month period is limited to a quantity of 15 for brands and 25 for generics. Brand and generic classification is determined through the Medispan table.
12 month period calculation example:
On Feb 15, 2018 - 01:00 PM EST, the quantity calculation will be for the period Feb 16, 2017 12:00 am EST to current date and time which is Feb 15 2018 – 1:00 PM EST.
Quantities to be included:
The calculation will include quantities posted by the member and listed as open postings (live in marketplace + hidden posting) and quantities from all orders sold by the member except the orders which are marked "cancelled". A partial pack is considered as quantity 1.
Packages Available Field:
The system has to limit the maximum value of the dropdown to 15 for brands and 25 for generics subtracted by above calculated quantity.
Example:
Current Date and Time: Feb 15, 2018 – 01:00 PM EST

#	Date and Time	Activity	Qty
1	Feb 15, 2017 – 9:00 AM EST	Member posts generic NDC "123" with 4 of full pack quantity.	4
2	Feb 15, 2017 – 12:00 PM EST	Member sold 1 full pack quantity of generic NDC "123" which was posted this morning	1
3	Feb 16, 2017 – 1:00 AM EST	Member sold another 1 full pack quantity of generic NDC "123" which was posted Feb 15th 2017	1
4	Sep 18, 2017 – 9:00 AM EST	Member sold another 1 full pack quantity of generic NDC "123" which was posted Feb 15 2017	1
5	Sep 20, 2017 – 9:00 AM EST	Sep 18 order was cancelled	1
6	Jan 25, 2018 – 12:00 AM EST	Member posts generic NDC "123" with partial quantity	1
7	Feb 15, 2018 – 09:00 AM EST	Member sold last 1 full pack quantity of generic NDC "123" which was posted in Feb 15 2017.	1
8	Feb 15, 2018 – 10:00 AM EST	Member posts generic NDC "123" with 2 of full pack quantity	2
9	Feb 15, 2018 – 01:00 PM EST	Current date and time. Member tries to post generic NDC "123"	

#	Total Sold	Total Open in Mktplace	Calculation to be used against limit on the day of #
1	0	4	4
2	1	3	4
3	2	2	4
4	3	1	4
5	2	1	3
6	2	2	4
7	3 (#2 gets dropped)	1	3
8	2	3	5
9	2	3	5

The maximum quantity allowed to be posted should be 20 which is calculated as follows:
Maximum quantity allowed = 25 – (#3 + #4 - #5 + #6 + #7 + #8)
= 25 – (1 + 1 – 1 + 1 + 1+2)
= 20

Messages:
Generics
ATTENTION: Per MatchRX policy, the sale of a single generic NDC during a 12 month period is limited to a quantity of 25. You have met this limit. You presently have 25 for sale in the marketplace. Please contact customer service with any questions.
ATTENTION: Per MatchRX policy, the sale of a single generic NDC during a 12 month period is limited to a quantity of 25. You have met this limit. You have sold 25 in this period. The next posting date is {date}. Please contact customer service with any questions.
ATTENTION: Per MatchRX policy, the sale of a single generic NDC during a 12 month period is limited to a quantity of 25. You have met this

limit. You have sold {quantity sold} in this period and presently have {quantity live} for sale in the marketplace. The next posting date is {date}. Please contact customer service with any questions.
NOTE: Per MatchRX policy, the sale of a single generic NDC during a 12 month period is limited to a quantity of 25. You have sold {quantity sold} in this period and presently have {quantity live} for sale in the marketplace. The maximum you can post is {quantity remaining}
NOTE: Per MatchRX policy, the sale of a single generic NDC during a 12 month period is limited to a quantity of 25. You have sold {quantity sold} in this period. The maximum you can post is {quantity remaining}
NOTE: Per MatchRX policy, the sale of a single generic NDC during a 12 month period is limited to a quantity of 25. You have {quantity live} for sale in marketplace. The maximum you can post is {quantity remaining}
Brands:
ATTENTION: Per MatchRX policy, the sale of a single brand NDC during a 12 month period is limited to a quantity of 15. You have met this limit. You presently have 15 for sale in the marketplace. Please contact customer service with any questions.
ATTENTION: Per MatchRX policy, the sale of a single brand NDC during a 12 month period is limited to a quantity of 15. You have met this limit. You have sold 15 in this period. The next posting date is {date}. Please contact customer service with any questions.
ATTENTION: Per MatchRX policy, the sale of a single brand NDC during a 12 month period is limited to a quantity of 15. You have met this limit. You have sold {quantity sold} in this period and presently have {quantity live} for sale in the marketplace. The next posting date is {date}. Please contact customer service with any questions.
NOTE: Per MatchRX policy, the sale of a single brand NDC during a 12 month period is limited to a quantity of 15. You have sold {quantity sold} in this period and presently have {quantity live} for sale in the marketplace. The maximum you can post is {quantity remaining}
NOTE: Per MatchRX policy, the sale of a single brand NDC during a 12 month period is limited to a quantity of 15. You have sold {quantity sold} in this period. The maximum you can post is {quantity remaining}
NOTE: Per MatchRX policy, the sale of a single brand NDC during a 12 month period is limited to a quantity of 15. You have {quantity live} for sale in marketplace. The maximum you can post is {quantity remaining}

BR_Pricing

Messages:
Pack Price should be at least 10% below WAC.
Items must be listed for $2.00 or more.

BR_Pictures

Maximum of 2 user uploaded pictures will be allowed per posting
Size & resolution: The system should allow the user to upload a picture up to the size of 10Mb. The system should compress the image to the resolution required for webpage, mobile website and mobile app and store it.
Format: The system should allow standard image formats and convert to .png and store it.
Crop and resize: The system should provide frame (similar to facebook profile picture upload experience) which the user can use to crop the image.
Medi-span image will always be the image displayed on the Buy page and the first image in the order.
All user uploaded pictures will be immediately live with the posting without the need for an approval. A back office user should have the ability to view and remove one or more user uploaded pictures without removing the posting.

BR_Leaving the page message

If the user clicks on any other tab(e.g. Buy) after searching an NDC, the system has toe display the below message and ask the user to confirm before proceeding.

"The information in this page will not be saved. Do you want to leave this page?" Confirm and cancel buttons.

BR_Mobile

Mobile app will have the same business rules and messages mentioned for above. The mobile app will have a wizard like step by step flow to capture the information mentioned in Data Field section. The user should be able to scan the bar-code and QR code using the mobile phone's camera. When scanning, the system should immediately start searching and user should not be required to click the search button. The user should be able to upload pictures from the mobile phone's gallery and capture a picture and add it to the posting.

Acceptance Criteria:

1. After the user enters a valid NDC, the fields mentioned in DF_Product Information are correctly populated and match the data available in Medispan table and other tables in Maria DB
2. If the NDC's storage value is Frozen/Refrigerated, the system should automatically select "Priority overnight" shipping and disable the other two options.
3. For non frozen/refrigerated NDC, if the user selects "No (buyer pays for shipping)", only "Ground" shipping should be enabled and selected as the default option. The other two options are disabled
4. The user is able to switch between the two price options
5. the comparison table is updated as the user edits the price

Fixed Price

1. The user is able to use the slider to change the price. The price is automatically updated when slider is moved and vice versa.
2. System displays error when price is less than $2.00
3. System displays error when price is more than 90% of WAC value
4. "Yes (for items $50 or more)" is disabled when fixed price is less than $50
5. If "Yes (for items $50 or more)" is currently selected and if the user changes the fixed price value to less than $50, the "Yes (for items $50 or more)" should be disabled and the "No" option should be automatically selected.

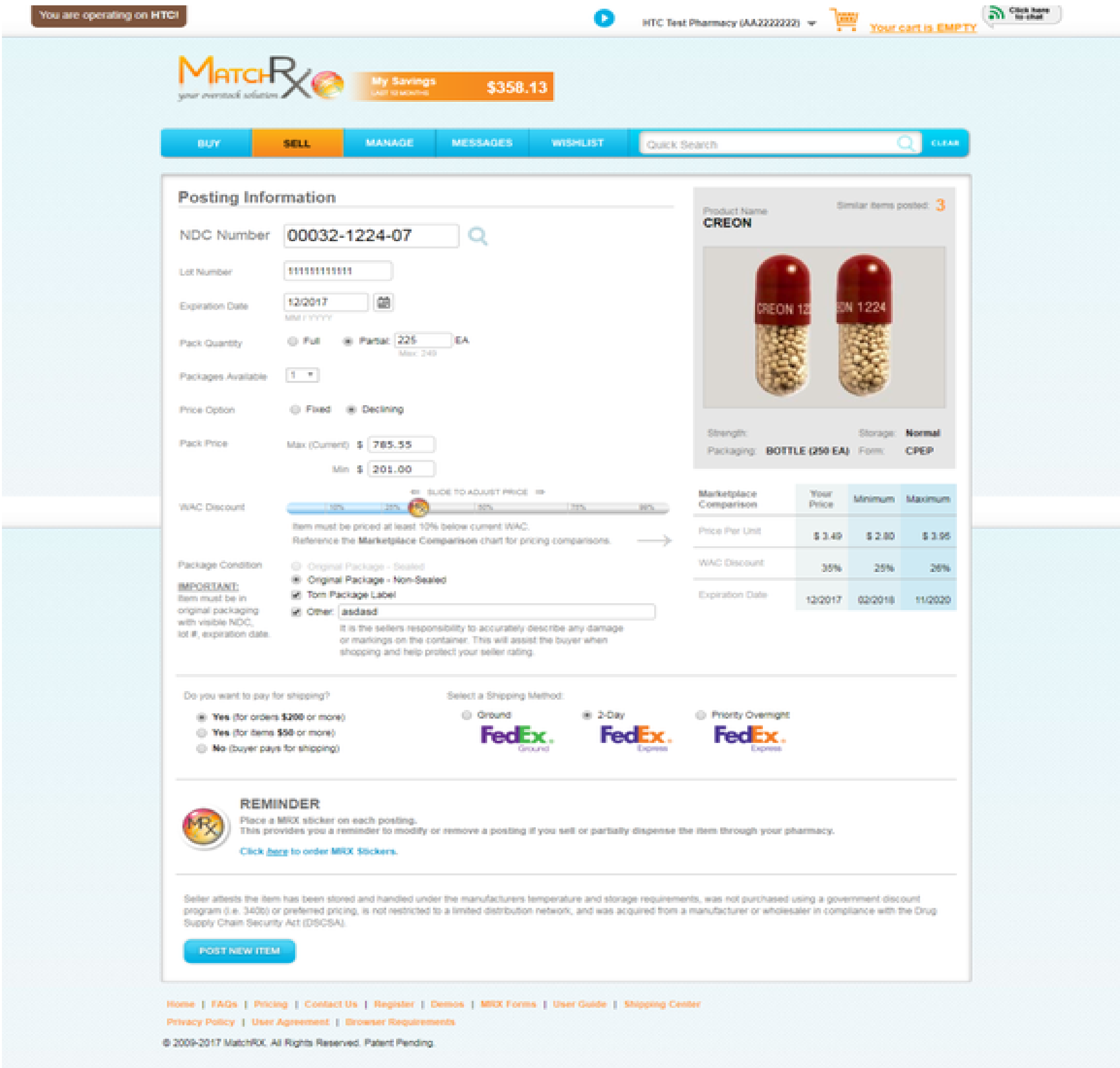
Declining Price

1. Pack price entered during the Fixed price option should be copied to "Max" field.
2. The user is able to use the slider to change the max price. The price is automatically updated when slider is moved and vice versa.
3. System displays error when max/min price is less than $2.00
4. System displays error when max/ min price is more than 90% of WAC value
5. System displays error when min price is not at least 20% less than the max price.
6. "Yes (for items $50 or more)" is disabled when min price is less than $50
7. If "Yes (for items $50 or more)" is currently selected and if the user changes the max/min price value to less than $50, the "Yes (for items $50 or more)" should be disabled and the "No" option should be automatically selected.

Marketplace Comparison table

1. The minimum and maximum columns should be calculated excluded the posting that is currently being posted or edited (in case of editing)
2. The minimum and maximum columns should be calculated based on the NDC
3. WAC discount displayed in this table for all three columns should be based on the current WAC and not the WAC price when the minimum or maximum posting was originally posted.

Screen Prototype



US 9 - BO Login

WBS #	Key Summary Updated Due Assignee Status Resolution Sprint ⚠ JIRA project doesn't exist or you don't have permission to view it. View these issues in JIRA
Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a back office user of MatchRx, I want the ability to login to back office application so that I can perform the tasks assigned to me.

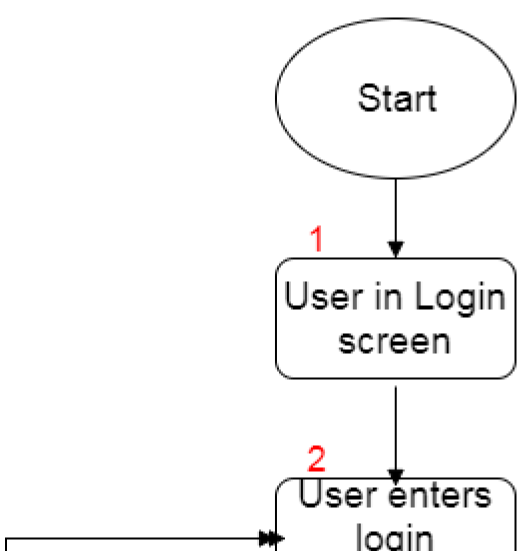
End Objective:	To provide a system for the registered back office users to log into back office application
User/Actor:	All registered back office users of MatchRx
Application:	MRX BO
Trigger:	When user is not logged in, the user should be in login screen
Related User Story:	N/A

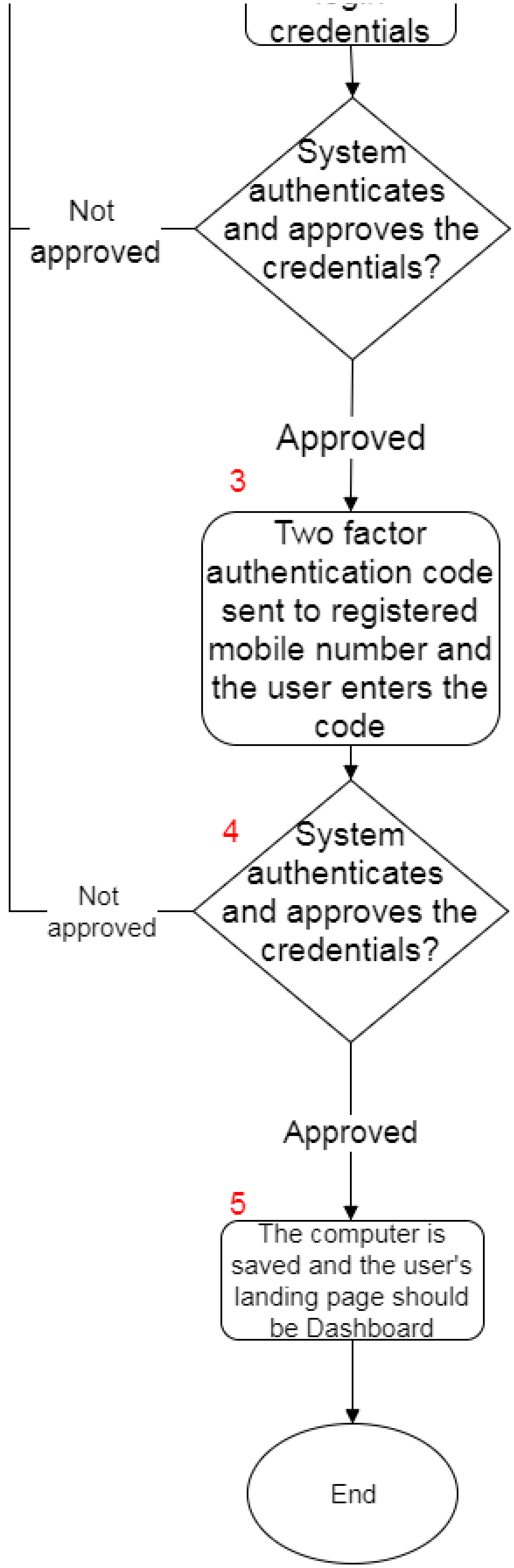
Related WBS Description:

162	As MRX employee I want to login to BO application.Two factor authentication with mobile number. Option to save the system to prevent future two factor authentication request. Roles and permissions should be applied to user correspondingly. All the business rules mentioned below is for a MRX admin who has full functionality. Functionalities for other user roles will be a subset of these business rule and not extra.
163	To onboard a new BO user, the Admin user will need the ability to provide credentials to the new BO user. This will be an invitation email with login id and link to create password. email address: This will be the login id. It will be provided by admin and user can't edit Password: Name: User role: Pre defined groups (e.g. Admin, Customer service rep) - User can't edit Manager: User can't edit Assigned Sales Rep: (if applicable. Could be multiple sales rep. User can't edit) Mobile Number: SMS sent for verification.
164	The link for BO user to recover their password (token on email so that user can reset his/her password)

Flow Chart

BO Login - Basic flow



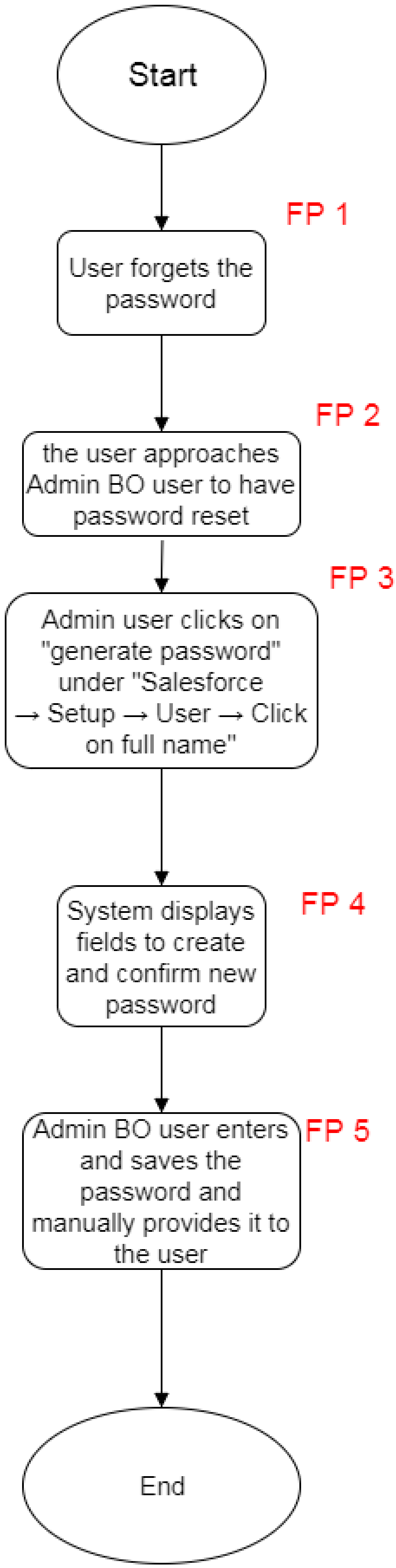

credentials
System authenticates and approves the credentials?
Not approved
Approved
3
Two factor authentication code sent to registered mobile number and the user enters the code
4
System authenticates and approves the credentials?
Not approved
Approved
5
The computer is saved and the user's landing page should be Dashboard
End

Preconditions
Application: MatchRX Back Office **Navigation**: User is in MatchRX Back office application Login page   **User Status:** Registered and Active Back office user

Basic flow

1. When not logged in, the user is always shown the login screen with the fields "email address" and "password" *(Data Fields).*
2. If the user enters the login credentials, proceed to step 3. If the user forgets the password, skip to "forgot password flow".
3. If the login credentials are correct, the system displays the field "Code" *(Data Fields) and* a text message with code is sent to the registered mobile number of the user. The user proceeds to step 4. If the login credentials are incorrect, the system displays an error message and the user has to go back to Step 2.
4. The system validates the two factor authentication code. If valid, proceed to step 5. If invalid, the user is taken back to Step 2.
5. Save the computer so that user doesn't have to provide two factor authentication code again for the same computer. The user is logged into his/her account with the dashboard as landing page.

BO Login - forgot password



Forgot password flow :

1. The user is redirected to the "forgot password" page.
2. The user approaches a BO user who has admin access.
3. The admin BO user clicks on "generate password" link under "Salesforce Setup User Click on full name"
4. The system redirect the admin BO user to the screen where the user can create new password.
5. The Admin user saves the password and manually provides it to the BO user who forgot the password.

Data Fields

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
Email Address	abc@matchrx.com	Varchar (min 13, max 50)	Empty	M	Text box	
Password		Varchar (min 8, max 50)	Empty	M	Text box	At least one number, one caps letter, and one symbol. No spaces or "$" sign allowed. BR_Password Rules
Code (two Factor authentication field)	1234	Numeric (min 4, max 4)	Empty	O	Text box	

M – Mandatory   O – Optional   R – Read only

Business Rules

BR_Password Rules

The passwords for the MatchRX Back office should follow strict rules. At least 8 characters (max 20), with at least one number, one caps letter, and one symbol. No spaces or "$" sign allowed.

BR_Admin Password Reset

The admin back office user should be able to change the password for any user. The admin user should not be able to see other user's password.

Acceptance Criteria

1. A registered back office user is able to successfully login per the flow mentioned in the Flow Chart.
2. A back office admin user is able to successful generate new password for all users.
3. A back office user is able to successful login if the admin user resets the password.

Test Data Requirement

1. BO users tables to check login and forgot password

US 10 - BO User Creation

WBS #

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-25	WBS 169: Assignments from CRM to be displayed and tracked for BO users	Dec 26, 2017 16:45		Swapna.Patnaikuni	CLOSED	Unresolved	Sprint 2
MHX-23	WBS 167: Create new MRX BO user [Two separate accounts]	Jan 05, 2018 20:20		Swapna.Patnaikuni	CLOSED	Unresolved	Sprint 2
MHX-22	WBS 166: Create new MRX BO user	Jan 05, 2018 20:20		Swapna.Patnaikuni	CLOSED	Unresolved	Sprint 2

3 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As an Admin user of MatchRx Back Office application, I want the ability to generate login credential for new back office users so that they can access the application.

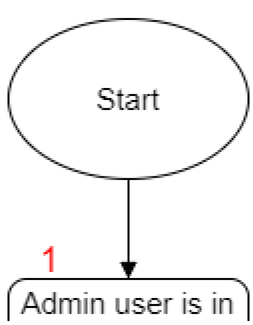
End Objective:	To provide a system to generate login credential for new users of back office application
User/Actor:	Admin user of MatchRx Back Office application
Application:	MRX BO
Trigger:	
Related User Story:	US 9 - BO Login

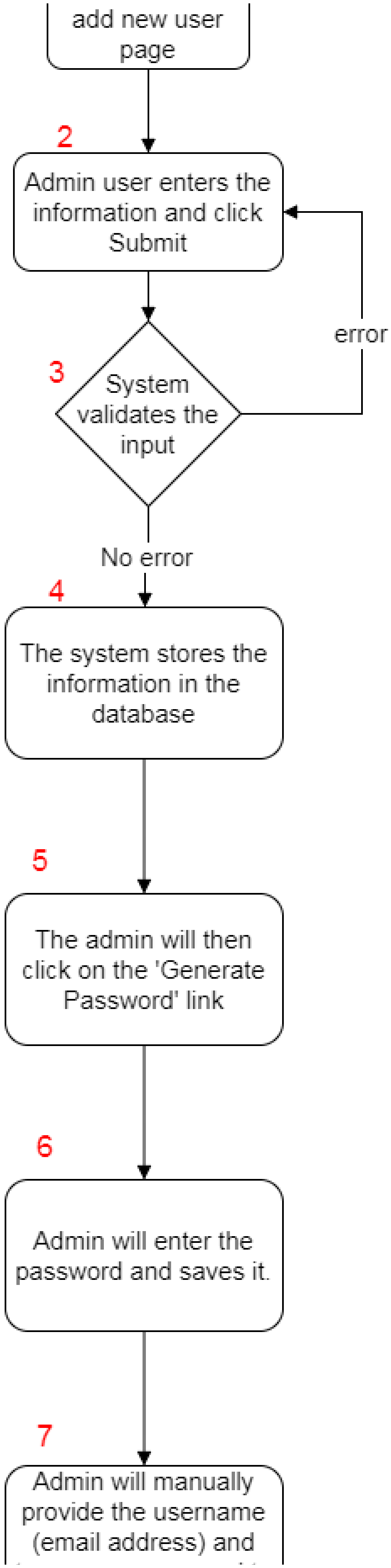
Related WBS Description:

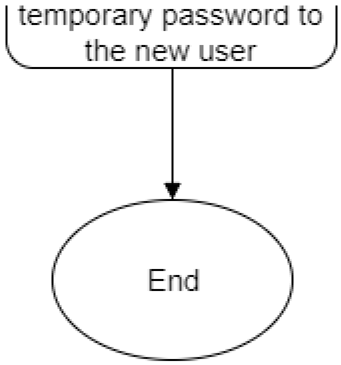
166	As BO Admin user I want to add new BO application user - First/last name- Email address (user id) - Assign predefined roles in system (more than one is possible)The system should a generate an email with token to the BO user's email address. Token on e-mail for accepting the invitation and creating the password.Refer BO user first time login
167	Current state:two separate accounts are created for a BO user. One to access Pearl (BO) and the other to access CRM.Future State:The BO user should need only one account to perform the below mentioned tasks.
169	Each member (VM/MRX 3.0) will have a Sales Rep assigned and each Sales Rep will have a Customer service rep(CSR) assigned. Any actions (e.g. tickets, seller not confirmed) related to that particular member will have to be assigned to that CSR.The CSR will still have the ability to view all members information if required. By default, assigned member information only.

Flow Chart

User Creation




add new user page
2
Admin user enters the information and click Submit
error
3
System validates the input
No error
4
The system stores the information in the database
5
The admin will then click on the 'Generate Password' link
6
Admin will enter the password and saves it.
7
Admin will manually provide the username (email address) and



Preconditions
Application: MatchRX Back Office **Navigation**: Admin User is in MatchRX Back office application add new user page   **User Status:** Admin User

User creation flow:

1. A back office user clicks on add new user and the system displays the fields mentioned in *Data Fields.*
2. The user enters the information & un-checks the "Generate new password and notify user immediately" and clicks Submit. clicks Submit.
3. The system validates the information. If the information is invalid, an error is displayed and repeat step 2. If information is valid, proceed.
4. The system stores the information in the database.
5. The admin will then click on the 'Generate Password' link on the newly created BO user record.
6. The admin will enter the password and saves it.
7. The admin will manually provide the username (email address) and temporary password to the new user. The system will not send it to the email address.
8. The process ends.

Data Fields

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
Status	Active	Dropdown	Empty	M	Dropdown	Options – Active and Inactive
First Name	John		Empty	M	Text box	
Last Name	Smith		Empty	M	Text box	
Email Address	abc@matchrx.com	Varchar (min 13, max 50)	Empty	M	Text box	One email address can have only one back office account in salesforce
Mobile number	1234567890	Numeric (min 10, max 10)	Empty	M	Text box	One mobile number can have only one back office account in salesforce
Generate Password		Varchar (min 8, max 20)	Empty	M	Text box	At least one number, one caps letter, and one symbol. No spaces or "$" sign allowed. BR_Password Rules & *BR_Admin Password Reset.* Admin should create the new password and the system will not generate a password
User Role	CSR Lead		Empty	M	Checkbox	Refer User Role Management Screen for list of options.

Title	Accountant	Drop down	Empty	M	Drop down	Options in Drop down 1. Accountant 2. Compliance Manager 3. Utilization Manager 4. Inside Sales Representative 5. Customer Service Representative 6. Customer Service Lead 7. Sales Manager 8. Director 9. Systems Administrator 10. Web Developer 11. Trainer 12. Add new (which should add a new option) No “Others” option
Manager	Mathew Stafford	Drop down	Empty	M	Drop down	
Assigned Sales Representative	Tom Brady	Check box	Empty	O/M	Check box (options are users with Title as Inside Sales Representative)	Mandatory only if User roles is Customer Service Team / CSR Lead / Utilization Manager / Member Trainer Should be able to assign multiple sales rep. Display only unassigned sales rep. BR_Assignment

M – Mandatory O – Optional R – Read only

Business Rules

BR_Assignment

Each member (VM/MRX 3.0) will have a Inside sales representative assigned and each Inside sales representative will have a Customer service representative (CSR) assigned. Any actions (e.g. tickets, seller not confirmed) related to that particular member will have to be automatically assigned to that CSR by the system.The CSR should still have the ability to view information of all members, if required but by default, should be displayed assigned members information only.

One Inside Sales Representative can have only one CSR (Team/Lead), one Utilization Manager and one Member Trainer assigned.

One CSR (Team/Lead) may have multiple Inside Sales Representatives assigned.

One Utilization Manager may have multiple Inside Sales Representatives assigned.

One Member Trainer may have multiple Inside Sales Representatives assigned.

Back Office User Access Rules

Feature/User Role	Admin	Accountant	IT	CSR Lead	CSR Team	Sales Manager	Sales Team	Compliance Manager	Marketing	Member Trainer	Utilization Manager	Wholesale Manager
New User creation	C	None	None	None	None	None	None	None	None	None	None	None

C - Create R - Read U - Update D - Delete E - Export None - Not visible

Acceptance Criteria

1. An Admin back office user is able to successfully create a new back office user per Flow Chart.
2. A back office user is able to successful create the password.

Test Data Requirement

1. BO user table to add a new user to the table

US 11 - BO User Management

WBS #								
	Key	**Summary**	**Updated**	**Due**	**Assignee**	**Status**	**Resolution**	**Sprint**
	MHX-1365	SF - UAT Bugs - Sep 21	Oct 04, 2018 05:04		Swapna.Patnaikuni	REWORK IN PROGRESS	Unresolved	
	MHX-34	WBS 170: BO - Deactivate (delete) user	Jan 16, 2018 10:18		Swapna.Patnaikuni	IN STAGING	Unresolved	Sprint 3
	MHX-24	WBS 168: User Profile	Dec 26, 2017 16:45		Swapna.Patnaikuni	CLOSED	Unresolved	Sprint 2
	MHX-21	WBS 165: List MRX users (Account Manager/users/Menu access)	Dec 26, 2017 16:45		Swapna.Patnaikuni	CLOSED	Unresolved	Sprint 2
	4 issues							
Document status	APPROVED							
Document owner	Raghul Manoharan							
UI Developer								
Developers								
QA								

Table of Contents

User Story

As an Admin back office user of MatchRx, I want the ability to manage back office users so that I can add and manage their access levels.

End Objective:	To provide a system for the admin back office users to manage back office users.
User/Actor:	Admin back office users of MatchRx
Application:	MRX BO
Trigger:	
Related User Story:	US - 10 BO User Creation

Related WBS Description:

166	As BO Admin user I want to add new BO application user - First/last name - Email address (user id) - Assign predefined roles in system (more than one is possible) The system should a generate an email with token to the BO user's email address. Token on e-mail for accepting the invitation and creating the password. Refer BO user first time login
167	Current state: two separate accounts are created for a BO user. One to access Pearl (BO) and the other to access CRM. Future State: The BO user should need only one account to perform the below mentioned tasks.
169	Each member (VM/MRX 3.0) will have a Sales Rep assigned and each Sales Rep will have a Customer service rep(CSR) assigned. Any actions (e.g. tickets, seller not confirmed) related to that particular member will have to be assigned to that CSR. The CSR will still have the ability to view all members information if required. By default, assigned member information only.

Business Rules

BR_User Management

Screen 1:

This screen should display a grid of all back office user with the following fields and with the ability to sort and edit in-line

1. Status
2. First name
3. Last name
4. Email address (User ID)
5. Mobile Number
6. User roles in system (more than one is possible)
7. Title
8. Manager
9. Reset password button

The user should have the ability to search the grid by

1. First name
2. Last name
3. Email address (User ID)
4. Mobile Number
5. User roles
6. Status

In this screen, the user should be able to

1. Invite a new user (US - 10 BO User Creation)

Example screen for high level reference only

Screen 2:

When the user clicks on a user(a row) in the grid, the system should open a new screen with the fields mentioned in US 10 - BO User Creation Data_Fields to enable user to edit the information and in addition display a read only extra field "Date when user was added".

In this screen, the user should be able to

1. Edit the user information
2. Delete a user
3. Reassign all tasks and work (e.g. tickets) from one user to another.

Example screen for high level reference only

BR_User Role Management

Screen 1:

This screen should display list of user roles. The user should also be able to add, edit, clone and delete user roles.The following user roles should be available by default.

1. Admin
2. Accountant
3. IT
4. CSR Lead
5. CSR Team
6. Sales Manager
7. Sales Team
8. Compliance Manager
9. Marketing
10. Member Trainer
11. Utilization Manager
12. Wholesaler Manager

Screen 2:

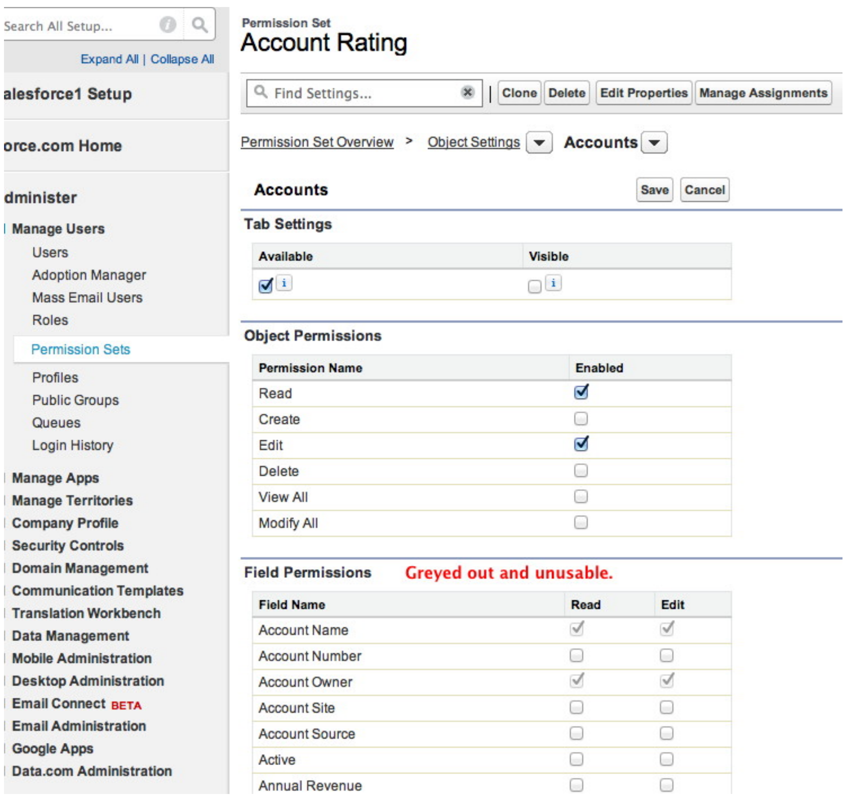
When the user clicks on a user role, the system should display a screen with the grid. Under the grid, the list of users with this user role and the ability to add and remove users to the particular role should be available.

Example screen for high level reference only

Screen 3:

Additionally, a user role may have restricted access to a particular field in a page (e.g. In member details page - CSR can edit phone number of member but not the member's license number but a Compliance manager will be able to edit member's license number but not the phone number) which will be mentioned in the respective user stories. The admin user should be able to change such accesses (field level) in that page(member details page).

Example screen for high level reference only (Refer "Field Permissions" Section

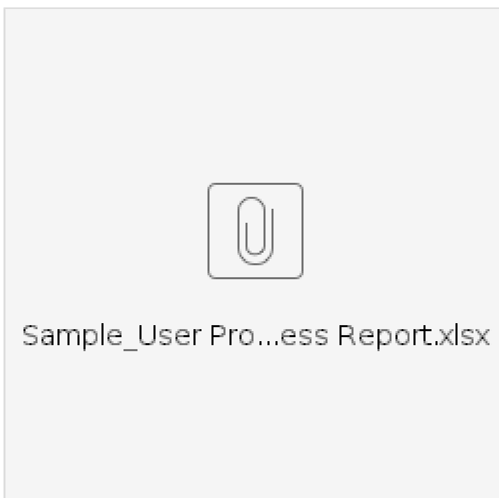


Screen / Report 4:

From this user role management screen, the user should be able to print/export a report which list all the accesses (including field level access in a page) for a particular user role.

Example screen for high level reference only

Example report for high level reference only



Back Office User Access Rules

Feature/User Role	Admin	Accountant	IT	CSR Lead	CSR Team	Sales Manager	Sales Team	Compliance Manager	Marketing	Member Trainer	Utilization Manager	Wholesaler Manager
User Management - Screen 1	CRUE	None	None	None	None	None	None	None	None	None	None	None
User Management - Screen 2	CRUDE	None	None	None	None	None	None	None	None	None	None	None
User Role Management - Screen 1	CRUDE	None	None	None	None	None	None	None	None	None	None	None
User Role Management - Screen 2	CRUDE	None	None	None	None	None	None	None	None	None	None	None
User Role Management - Screen 3	CRUDE	None	None	None	None	None	None	None	None	None	None	None

User Role Management - Screen 4	RE	None	None	None	None	None	None	None	None	None	None	None

C - Create R - Read U - Update D - Delete E - Export None - Not visible

Acceptance Criteria

For sprint 2:

1. Six screens mentioned in Business Rules section with described functionality.
2. Back Office User Access Rules should work for all six screens

For future sprints:

As we develop more user stories for back office (e.g. Member details page), we will define access on page level and field level for each of the user roles mentioned. As those screens are developed, it is expected that an admin user will be manage access from the screens developed in this user story.

Test Data Requirement

1. BO users table to check screen 1 and 2 features

US 12 - VM Wholesaler Registration Page

WBS #	

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MRX-406	MRX-UAT(Cycle2): Issues related to Member Rating page.	Sep 28, 2018 10:06		rajasekar.jeyakumar@htcindia.com	CLOSED	Unresolved	
MRX-308	MRX_PHP: Issue in download pdf (Aug 9).	Aug 10, 2018 14:04		Anandan	CLOSED	Unresolved	
MRX-90	VM-Seller Registration (Page 2 & 3)	Aug 16, 2018 16:06		Anandan	IN QA	Unresolved	Sprint 6
MHX-1368	Web - UAT Bugs - Sep 21	Sep 26, 2018 23:44		Ramprakash	OPEN	Unresolved	
MHX-1366	Mobile - UAT Bugs - Sep 21	Sep 27, 2018 13:00		Ramprakash	OPEN	Unresolved	
MHX-1365	SF - UAT Bugs - Sep 21	Oct 04, 2018 05:04		Swapna.Patnaikuni	REWORK IN PROGRESS	Unresolved	
MHX-1356	SF - UAT Bugs - Aug 22	Sep 26, 2018 23:54		Swapna.Patnaikuni	REWORK IN PROGRESS	Unresolved	
MHX-1353	Mobile - UAT Bugs - Aug 22	Sep 14, 2018 09:14		Ramprakash	HOLD	Unresolved	
MHX-1343	Web - UAT Bugs - Aug 9	Sep 23, 2018 19:08		Ramprakash	RESOLVED	Unresolved	
MHX-1327	Web - UAT Bugs - Aug 1	Sep 12, 2018 12:54		Ramprakash	RESOLVED	Unresolved	
MHX-1019	Web 16 March	Sep 10, 2018 07:04		Karthigaichamy Malaimegam	HOLD	Unresolved	
MHX-74	WBS 5: PHP VM Vendor Application	Feb 12, 2018 18:26		V	PROD READY	Unresolved	Sprint 3

12 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a wholesaler, I want a registration webpage so that I can provide the required information to register for VM wholesaler application

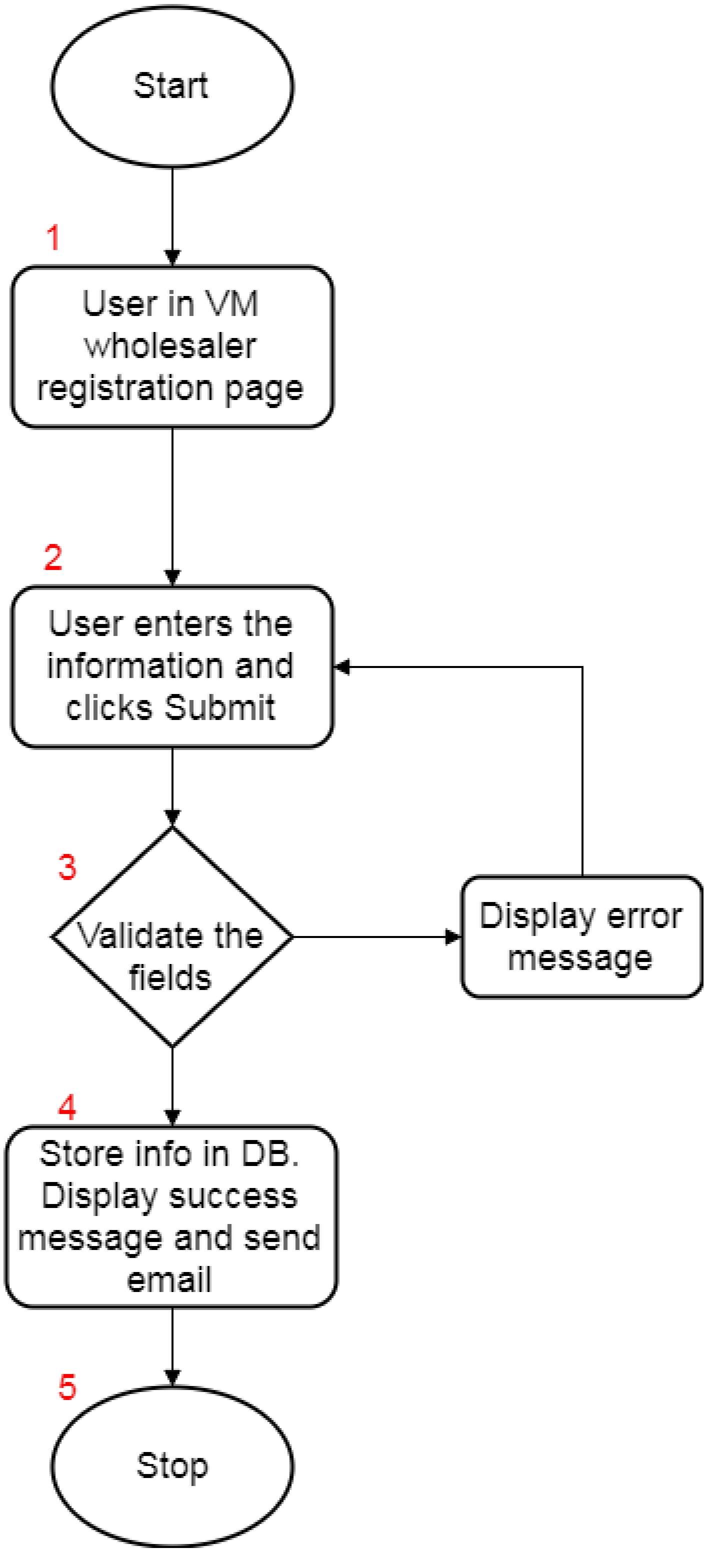
End Objective:	To provide an application page for the wholesalers to register for VM wholesaler application and capture the information in Sales force database
User/Actor:	All users of MatchRx.com website
Program Type:	Webpage and Salesforce CRM
Trigger:	
Related User Story:	
Related WBS #:	5

Related WBS Description:

5	The home page will be common for VM and 3.0. The hompage will be split vertical and one section will be dedicated for VM and the other for 3.0 with options to sign up. Two separate sign up pages (VM, 3.0) will be maintain in the website. VM sign up page Are you a buyer or seller? If seller is selected, the following fields should be displayed. Company info 1) "Company Information" * Legal Business Name * * Doing Business as (DBA) * * Address 1 * * Address 2 * City * * State * * Zip Code * * Phone * * Fax * 2) "Primary Contact Information" * First Name * * Last Name * * Email Address * * Email Address (Confirm) * 3) Notes (Text box) 4) Link to generic vendor agreement. There is no validation rules for the above fields.This information will be uploaded to the CRM and the BO user will call the primary contact to validate and authorize the seller. This will be a manual process.

Flow Chart

Registration Flow



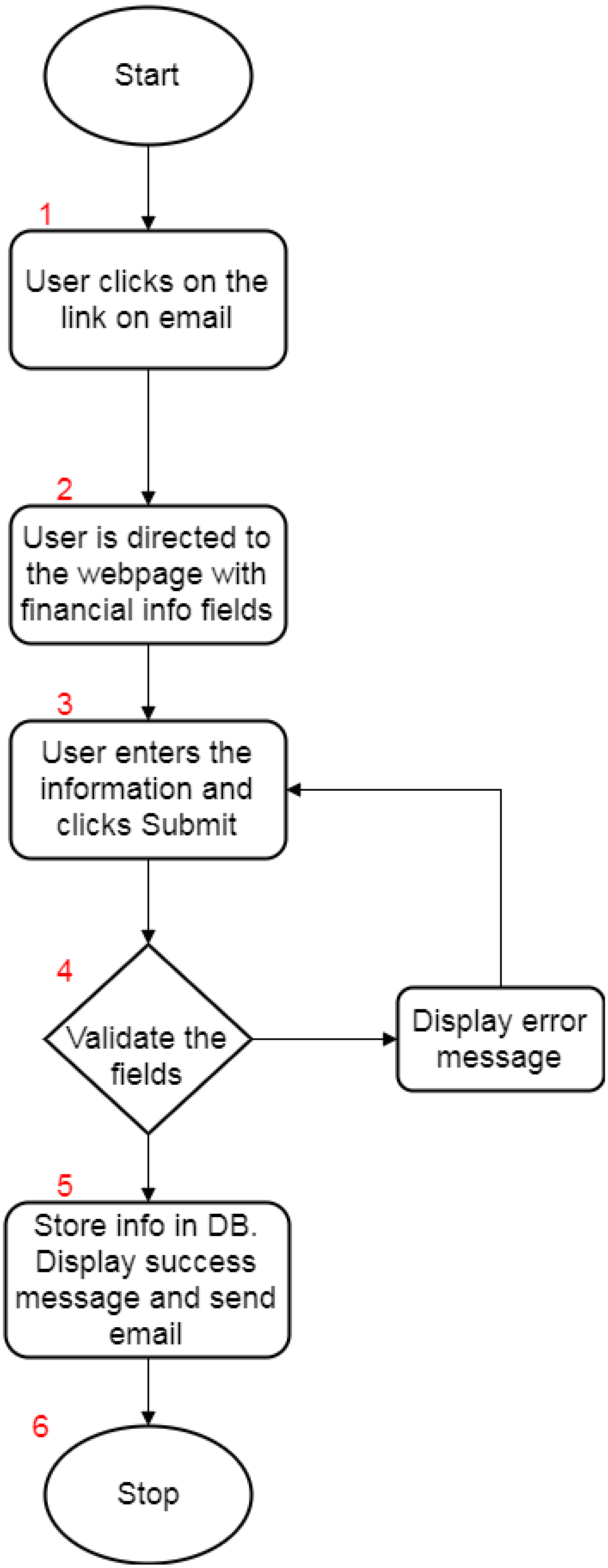
| **Preconditions**|

Application: MatchRX Front office
Navigation: User is in www.matchrx.com

Registration Flow:

1. The user is in the VM wholesaler registration page which has the fields (DF_Full Application)
2. The user enters the information in the fields and clicks Submit
3. The system validates the fields. If all the fields entered are correct, proceed. Else repeat step 2.
4. The system stores the information in Salesforce database *(BR_Salesforce)* and display a success message. The system also sends the application number to the primary contact's email address (*BR_Email*).
5. The process ends.

Financial Information Flow


Start
1
User clicks on the link on email
2
User is directed to the webpage with financial info fields
3
User enters the information and clicks Submit
4
Validate the fields
Display error message
5
Store info in DB. Display success message and send email
6
Stop

| **Preconditions**|

Application: MatchRX Front office through email

Navigation: Link sent to user's email

Financial Information Flow :

1. The user clicks on the link on the email
2. The user is redirect to the financial information page (*DF_Financial_Information*) with application number prepopulated and non editable
3. The user enters the information/uploads the documents
4. The system validates the fields. If all the fields entered are correct, proceed. Else display error message and repeat step 1.
5. The system stores the financial information (*DF_Financial_Information)* in MMS database, provides a success message on the webpage (*BR_Success_Message)* and sends an email (*BR_*Email*)*. The system updates the application record in Salesforce indicating that each document has been uploaded with date/timestamp *(BR_Salesforce)*
6. Process ends.

Data Fields

DF_Full_Application

Company Information

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
Legal Business Name	XYZ Pharmacy LLC	Varchar (min 1, max 60)	Empty	M	Text box	
Doing Business as (DBA)	ABC Pharmacy	Varchar (min 1, max 60)	Empty	M	Text box	
Billing Address 1	100 E Main St.	Varchar (min 1, max 55)	Empty	M	Text box	
Billing Address 2	Ste. 2A	Varchar (min 1, max 55)	Empty	O	Text box	
Billing City	Royal Oak	Varchar (min 1, max 30)	Empty	M	Text box	
Billing State	Michigan	Single line of text	--Select—	M	Drop down	Dropdown list of all 50 US states
Billing Zip Code	48201-1234	Numeric (min 5, max 9)	Empty	M	Text box	
Phone	123-456-7890	Numeric (min 10, max 10)	Empty	M	Text box	
Fax	987-654-3210	Numeric (min 10, max 10)	Empty	M	Text box	
Click here if Shipping Information is same as Billing Information	N/A	N/A	Unchecked	O	Check box	When user checks this box, the system should prepopulate all the below fields in this section with the shipping address information and allow user to edit. Unchecking and rechecking the box should again prepopulate all the below fields in this section with the shipping address information.
Shipping Address 1	100 E Main St.	Varchar (min 1, max 55)	Empty or prepopulated	M	Text box	

Shipping Address 2	Ste. 2A	Varchar (min 1, max 55)	Empty or prepopulated	O	Text box	
Shipping City	Royal Oak	Varchar (min 1, max 30)	Empty or prepopulated	M	Text box	
Shipping State	Michigan	Single line of text	--Select— or prepopulated	M	Drop down	Dropdown list of all 50 US states
Shipping Zip Code	48201-1234	Numeric (min 5, max 9)	Empty or prepopulated	M	Text box	

Primary Contact Information

Field Name	Example	Data Type	Default Value	M/O/R*	Control Type	Remarks
First Name	John	Alpha + Symbols. No numbers (min 1, max 20)	Empty	M	Text box	
Last Name	Smith	Alpha + Symbols. No numbers (min 1, max 20)	Empty	M	Text box	
Title/Position	Owner	Varchar (min 1, max 30)	Empty	M	Text box	
Mobile Number	123-456-7890	Numeric (min 10, max 10)	Empty	M	Text box	Format must be xxx-xxx-xxxx
Email Address	abc@xyz.com	Varchar (min 1, max 50)	Empty	M	Text box	
Email Address (Confirm)	abc@xyz.com	Varchar (min 1, max 50)	Empty	M	Text box	

Wholesaler Agreement

Field Name	Example	Data Type	Default Value	M/O/R*	Control Type	Remarks
Sample Wholesaler Agreement	File Link	File Link	Link to download file	O	Link	Sample Wholesaler agreement will be attached for the user to download. Placeholder document:

Comments

Field Name	Example	Data Type	Default Value	M/O/R*	Control Type	Remarks
Comments	ABC123	Varchar (min 1, max 500)	Empty	O	Text box	

DF_Financial_Information

Application Number

Field Name	Example	Data Type	Default Value	M/O/R*	Control Type	Remarks

Application Number	523131	Numeric (min 6, max 6)	Empty/prepopulated	M	Text box	Prepopulated and edit disabled. The number has to be randomized. the format will be 5xxxxx
Name (Legal entity)	XYZ LLC	Varchar (min 1, max 60)	Prepopulate and non-editable	M	Text box	
DBA	ABC wholesalers	Varchar (min 1, max 60)	Prepopulate and non-editable	M	Text box	
Billing Address 1	100 E Main St.	Varchar (min 1, max 55)	Prepopulate and non-editable	M	Text box	
Billing Address 2	Ste 2A	Varchar (min 1, max 55)	Prepopulate and non-editable	M	Text box	
Billing City	Royal Oak	Varchar (min 1, max 30)	Prepopulate and non-editable	M	Text box	
Billing State	Michigan	Varchar (min 1, max 30)	Prepopulate and non-editable	M	Text box	
Billing Zip	48201-1234	Numeric (min 5, max 9)	Prepopulate and non-editable	M	Text box	
Pharmacy Phone	123-456-7890	Numeric (min 10, max 10)	Prepopulate and non-editable	M	Text box	
Email Address	abc@xyz.com	Varchar (min 1, max 50)	Prepopulate and non-editable	M	Text box	

The user should fill at least one of the following sections and may choose to fill more than one section. Once a section is filled, it is mandatory to fill the section completely unless specified in remarks.

ACH Info section

Field Name	**Example**	**Data Type**	**Default Value**	**M/O/R***	**Control Type**	**Remarks**
Text: I hereby authorize MRX Holdings LLC to initiate the entries to my accounts in relation to transactions I execute on MRX Holdings LLC at no cost. I acknowledge that I possess the authority to request the origination of automated clearing house (ACH) transactions to the account described below and the origination complies with the provisions of U.S. law. Transactions dishonored by the Receiving Depository Financial Institution and returned to MRX Holdings LLC will be subject to a processing fee.						
Account Number	1234567	Numeric (min 4, max 20)	Empty	M	Text box	
Confirm Account Number	1234567	Numeric (min 4, max 20)	Empty	M	Text box	
Routing Number	123456789	Numeric (min 9, max 9)	Empty	M	Text box	
Financial Institution	Chase	Alpha numeric (min 0, max 50)	Prepopulate but editable	M	Text box	Prepopulate using ABA API (https://routingnumber.aba.com/default1.aspx)
Account Type	Checking	Checking/Savings	Empty	M	Radio button	
Upload ACH form	N/A	PDF/ jpeg	Empty	O/M	File Upload	File to download empty ACH form with fields prepopulated (refer above section). Upload File size restriction: 3 MB. The user can upload ACH form or use e-sign or both but atleast one is mandatory if any field in this section is filled.

E-Signature	John Smith	Varchar (min 2, max 51)	Empty	O/M	Text box	This authority is to remain in full force and effect until MRX Holdings LLC has received written notification from me of its termination in such time and in such a manner as to afford MRX Holdings LLC a reasonable opportunity to act on it. TERMS OF ACCEPTANCE and SIGNATURE I, [Applicant's name], am authorized to approve the banking information and warrant the truthfulness of the information provided in this application. Electronic Signature: * Please type your First and Last Name I understand that checking this box constitutes a legal signature confirming that I acknowledge and agree to the above Terms of Acceptance.
Date	12-31-2017	Numeric	Empty	M	Calendar/text box	

Check section

Field Name	Example	Data Type	Default Value	M/O/R*	Control Type	Remarks
Upload voided check	N/A	PDF/image	Empty	O	File Upload	Upload File size restriction: 3 MB

Wholesaler Agreement section

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
Upload Wholesaler Agreement	N/A	PDF/ jpeg	Empty	O	File Upload	File size restriction: 3 MB. File to download Wholesaler agreement which will be upload by Back office user. The user is expected to download, sign and upload the signed form. (Should be stored in MatchRX DB and not in MMS)

M – Mandatory O – Optional R – Read only

Business Rules

BR_Success_Message

After submitting registration page - 1:

"Thank you for registering. Your application number is {----------}. Please reference this number when contacting MatchRX. Our compliance team will validate the information provided and contact you with any questions. If you have any questions, please reference your application number and contact registration@matchrx.com or call (877) 590-0808"

After submitting forms by choosing e-sign or upload on financial information page:
"Thank you for submitting your financial information. Your account representative will contact you once your documents have been verified, typically within 2 business days after all forms have been received. If you have any questions, please reference your application number and contact registration@matchrx.com or call (877) 590-0808. We look forward to welcoming you as a new MatchRX wholesaler!"

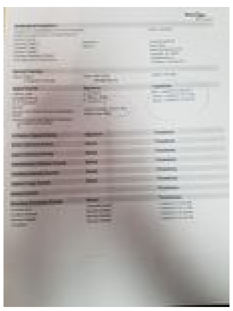
BR_Financial_Information

Display the below message on the top of the page.
To complete your registration, please provide a signed ACH form, Wholesaler agreement and photocopy/image of a blank check (starter checks are not accepted). Choose one of the methods below to submit the documents:"
The webpage should have the sections mentioned in *DF_Financial_Information*

The Wholesaler agreement will be upload by the back office user. The agreement will be specific for a particular Wholesaler after negotiations.

Followed by below
" *If you have any questions, please reference your application number and contact registration@matchrx.com or call (877) 590-0808*"

When a user e-signs, the information in the attached picture should be captured.



BR_Email

These templates will reside in Salesforce/Send Grid. Template development is out of scope for HTC. Below is for information purpose only.

Email 1 - After a user submits registration:
Dear "Primary First Name"
Thank you for registering with MatchRX. Your application number is {-------}. Please reference this number when contacting MatchRX regarding the status of your registration. Our compliance team will validate the information and contact you with any questions.
If you have any questions regarding your registration, please contact registration@matchrx.com or call (877) 590-0808.
Thank you.
The MatchRX Team

Email 2 - After a user e-signs or uploads a financial document:
Dear "Primary First Name"
Thanks for uploading the document. We now have your {ACH form / voided check / sales tax exempt form}. Your account representative will contact you once your documents have been verified, typically within 2 business days after all forms have been received. If you have any questions regarding your registration, please reference your application number {application number} and contact registration@matchrx.com or call (877) 590-0808.
We look forward to welcoming you as a new MatchRX wholesaler!
Thank you.
The MatchRX Team

Email 3 - When a user receives link to submit financial information:
Dear "Primary First Name"

To complete your registration, please click here to submit {link to page 2 of application} a signed ACH form, photocopy/image of a bank check (starter checks are not accepted), and a signed wholesaler agreement. Our compliance team will validate the information and contact you with any questions.

Your registration number is {-------}. Please reference this number when contacting MatchRX at registration@matchrx.com or call (877) 590-0808.

Thank you.
The MatchRX Team

BR_Salesforce

Status	Trigger and rules
Prospect	Default status before a registration starts
New	Once the user submit page 1 of the registration, the application status column of the wholesaler record in prospective member database stored in Salesforce should be updated to "New - WHS". (Updating the status to "New - WHS" is in scope for HTC) . Unlike DataQ prospective member database, the wholesaler prospective member database will be an empty database at the start and will be populated only through wholesaler registration page and back office (salesforce) screens. Whenever a document (ACH/Cheque/Wholesaler Agreement) is uploaded by Front office user or back office user, salesforce should update the record with the document uploaded and time stamp it. (In scope for HTC).
In process	Once the registration application is assigned by the sales manager to a sales rep, the status will be changed to "in process". During the "in process" status, the registration is verified by the compliance team for ownership.
Pending financial documents	Once verified, the status changes to "pending documents" until all documents (ACH/Cheque/Wholesaler Agreement) are received and approved. (Out of Scope for HTC). When changed to status "pending documents", the system should trigger the Email 3 - link to upload docs. The BO user should also be able to trigger the email via a button in the vendor record during any status.
Approved	Once a back office user changes the status to "Approved", link to create login credentials are sent, and a hard copy welcome letter will automatically be generated (templates developed by MRX for wholesaler only). Only when an application is approved as a member and the link to create login credentials sent, the information has to be copied to MatchRX database.
Pending quickstart	Once the primary user creates login credential, the application status will be set to" Pending Quickstart". (In scope for HTC).

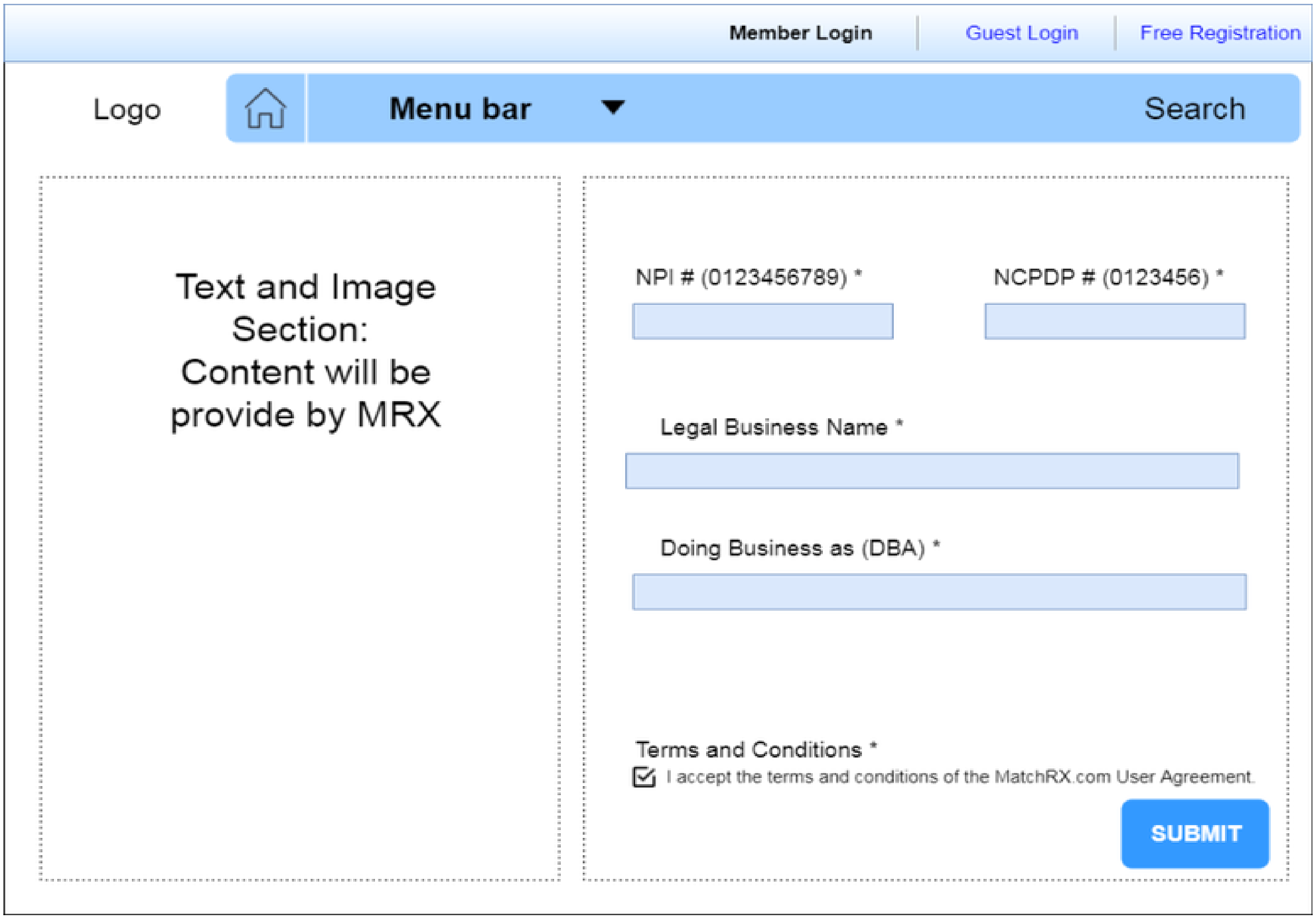
Acceptance Criteria

1. A user is able to successfully provide information for registration per the flow mentioned

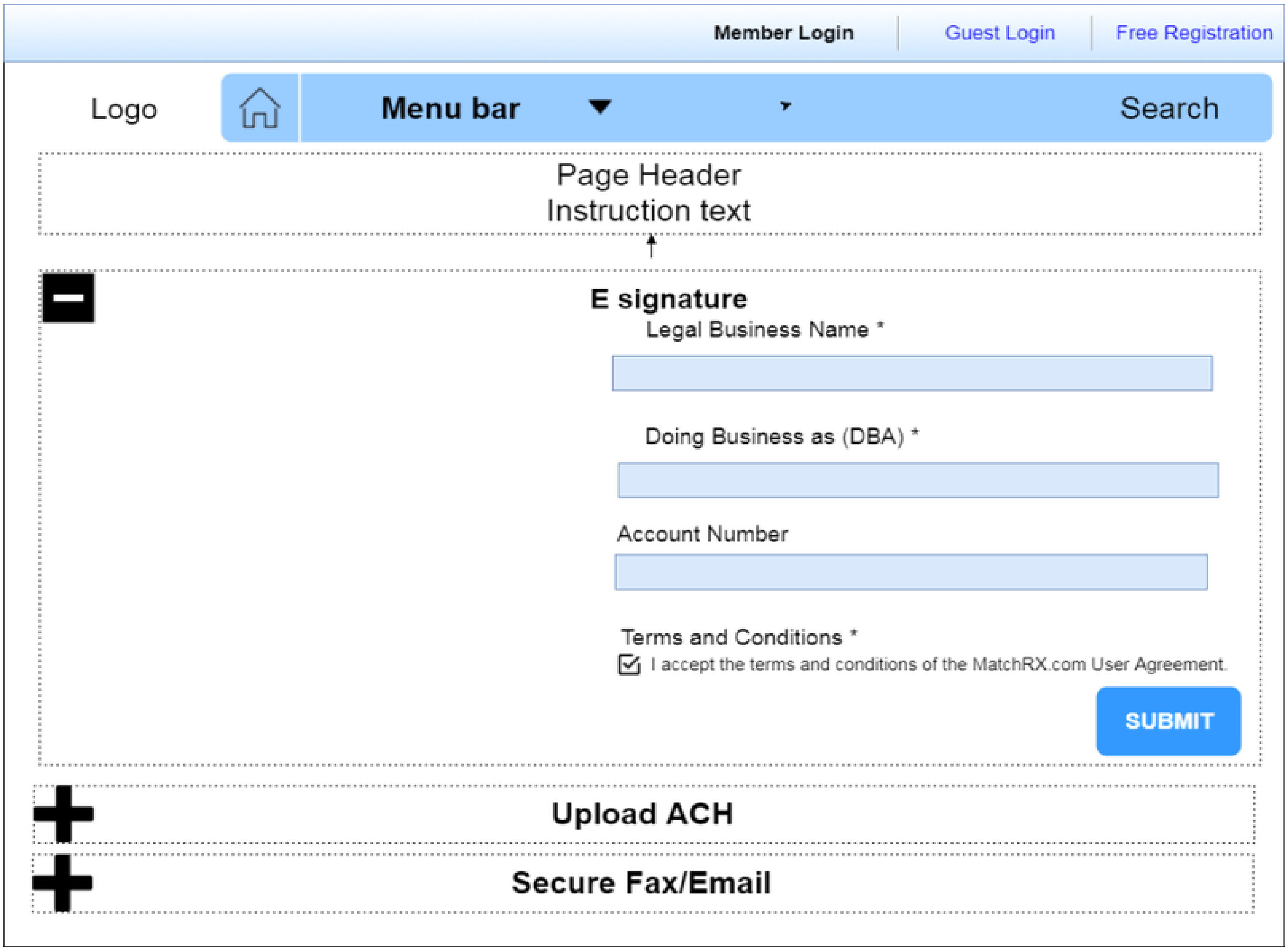
   The information is also successfully stored in the SalesForce database with the status as "New - WHS"
2. The system sends an email with application number when
   a. A new user submits Page 1 of registration
   b. A user upload/e-signs a document
   c. a back office user triggers the document request email to the user
3. A user is able to download Pre-populated ACH form and upload the pdf/image on Page 2 of registration
4. A user is able to download pre-populated Wholesaler agreement and upload the pdf/image on Page 2 of registration
5. User can upload documents
6. User completes electronic ACH form with e-signature.

Screen Reference

Page 1 - Registration Page



Page 2 - Financial Information Page: Three expand and collapse sections



US 13 - BO Member Search

WBS #

Key	Summary	Updated	Due	Assignee	Status	Sprint
MHX-1356	SF - UAT Bugs - Aug 22	Sep 26, 2018 23:54		Swapna.Patnaikuni	REWORK IN PROGRESS	
MHX-291	WBS 225: BO - Search print and export	Mar 19, 2018 06:03		Swapna.Patnaikuni	IN QA	Sprint 7
MHX-290	WBS 224: BO - Search VM memberships	Mar 17, 2018 12:52		Swapna.Patnaikuni	IN QA	Sprint 7
MHX-289	WBS 223: BO - Search predefined list spec	Mar 17, 2018 12:52		Swapna.Patnaikuni	IN QA	Sprint 7
MHX-288	WBS 222: BO - Seller advanced search	Mar 07, 2018 07:41		Swapna.Patnaikuni	IN STAGING	Sprint 4
MHX-287	WBS 221: BO - Seller Basic search	Mar 07, 2018 07:41		Swapna.Patnaikuni	IN STAGING	Sprint 4
MHX-286	WBS 220: BO - Buyer advanced search	Mar 07, 2018 07:41		Swapna.Patnaikuni	IN STAGING	Sprint 4
MHX-260	WBS 219: BO - Buyer Basic Search	Mar 07, 2018 07:41		Swapna.Patnaikuni	IN STAGING	Sprint 4
MHX-80	WBS 175: BO - Review list of 3.0 Memberships	May 22, 2018 07:12		Swapna.Patnaikuni	IN STAGING	Sprint 6
MHX-79	WBS 174: BO - Review list of 3.0 Memberships with expiration alerts	Feb 12, 2018 18:31		Swapna.Patnaikuni	PROD READY	Sprint 3
MHX-78	WBS 173: BO - Review list of 3.0 Memberships (Marketplace/Members column listings) [Predefined List with Filters]	Jan 16, 2018 10:18		Swapna.Patnaikuni	IN STAGING	Sprint 3
MHX-77	WBS 172: BO - Advance Search in BO [Search Filters]	Feb 12, 2018 18:31		Swapna.Patnaikuni	PROD READY	Sprint 3
MHX-76	WBS 171: BO - Basic Search in BO [Search Filters]	Jan 16, 2018 10:17		Swapna.Patnaikuni	IN STAGING	Sprint 3

13 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a back office user of MatchRx, I want the ability to search members with various filters so that I can quickly find a member with variety of information.

End Objective:	To provide a system for the back office users to search members.

User/Actor:	Back office users of MatchRX
Application:	MRX BO
Trigger:	
Related User Story:	

Related WBS Description:

171	As a BO user, I would lik to perform a Basic Search to find information: -DEA -Member Name (Pharmacy DBA); -Owner First Name; -Owners Last Name; -Order #; -SEARCH Button. The search results should have filter based on the fields mentioned in advanced search below.
172	Advanced Search As BO user I want to view filters to search for: -DEA; -NCPDP; -Member (Pharmacy DBA); -Owner First Name; -Owners Last Name; -Group; -Source; -Pharmacy State; -Association; -Membership date from; -Membership date to; -Pharmacy; -Document; -Order #; -Transaction From [DATE]; -Transaction To [DATE]; -ACH From [DATE]; -ACH To [DATE]; -Type [DEBIT/CREDIT]; -Category [FEDEX CLAIM; NUISANCE FEE; SHIPPING CHARGE; NSF/NSF RESUBMIT; PROMO; REVISION; MRX_PAID]; - Status [ANY; BUYER REVISED; CANCELED; COMPLETE; PENDING BUYER CONFIRMATION; PENDING DELIVERY; PENDING SELLER CONFIRMATION; SELLER REVISED]; -Order Status [revised; pending delivery; etc.]; - Amount [=; >; <; LIKE; LIKE%; %LIKE; %LIKE%; NOT LIKE]; -Buyer DEA; -Buyer DBA; -Buyer State; -Seller DEA; -Seller DBA; -Seller state; -Sales Rep First Name (assigned to Seller); -Sales Rep Last Name (assigned to Seller); -Tracking #; -SEARCH Button.
173	I want predefined list views with relevant list items filtering, list columns & list sorting for each stage of pharmacy lifecycle: - Active members - Suspended; - Closed.
174	I want predefined list views for - Newly registered members; - Members with state license expiration alert. (Alert will be tracked by CRM and just displayed on+ BO screens) Each BO user roles (group) will have different privileges.

175	I want to: - mange view of the list (number of records per page, sorting, navigation); - export the list to CSV/XLS file; - print the list.
219	Basic Search -DEA -Member Name (Pharmacy DBA); -Owner First Name; -Owners Last Name; -Order #; -SEARCH Button. The search results should have filter based on the fields mentioned in advanced search below.

220	Advanced Search As BO user I want to view filters to search for: -DEA; -NCPDP; -Member (Pharmacy DBA); -Owner First Name; -Owners Last Name; -Group; -Source; -Pharmacy State; -Association; -Membership date from; -Membership date to; -Pharmacy; -Document; -Order #; -Transaction From [DATE]; -Transaction To [DATE]; -ACH/CC From [DATE]; -ACH/CC To [DATE]; -Type [DEBIT/CREDIT]; -Category [FEDEX CLAIM; NUISANCE FEE; SHIPPING CHARGE; NSF/NSF RESUBMIT; PROMO; REVISION; MRX_PAID]; - Status [ANY; BUYER REVISED; CANCELED; COMPLETE; PENDING BUYER CONFIRMATION; PENDING DELIVERY; PENDING SELLER CONFIRMATION; SELLER REVISED]; -Order Status [revised; pending delivery; etc.]; - Amount [=; >; <; LIKE; LIKE%; %LIKE; %LIKE%; NOT LIKE]; -Buyer DEA; -Buyer DBA; -Buyer State; -Seller DEA; -Seller DBA; -Seller state; -Sales Rep First Name (assigned to Seller); -Sales Rep Last Name (assigned to Seller); -Tracking #; -SEARCH Button.

221	Basic Search - Vendor ID (Assigned by MRX) - Member Name ; -Owner First Name; -Owners Last Name; -Order #; -SEARCH Button. The search results should have filter based on the fields mentioned in advanced search below.
222	Advanced Search As BO user I want to view filters to search for: -Member Name; -Owner First Name; -Owners Last Name; -Source; -State; -Membership date from; -Membership date to; -Document; -Order #; -Transaction From [DATE]; -Transaction To [DATE]; -ACH/CC From [DATE]; -ACH/CC To [DATE]; -Type [DEBIT/CREDIT]; -Category [NUISANCE FEE; NSF/NSF RESUBMIT; REVISION; MRX_PAID; Vendor Settlement]; - Status [ANY; CANCELED; COMPLETE; IN TRANSIT; PENDING SELLER CONFIRMATION;]; - Amount [=; >; <; LIKE; LIKE%; %LIKE; %LIKE%; NOT LIKE]; -Buyer DEA; -Buyer DBA; -Buyer State; - Vendor Name; -Sales Rep First Name (assigned to Seller); -Sales Rep Last Name (assigned to Seller); -Tracking #; -SEARCH Button.
223	I want predefined list views with relevant list items filtering, list columns & list sorting for each stage of buyer/seller lifecycle: - Active members - Suspended; - Closed.
224	I want predefined list views for - Newly registered members; - Members (Buyers) with state license expiration alert.

225	I want to: - manage view of the list (number of records per page, sorting, navigation); - export the list to CSV/XLS file; - print the list.

Business Rules

BR_Member search basic

The Back office user should be able to search for members using the Global search

BR_Member dropdown page

The default view for all list views (except VM Wholesaler) should display a grid with following columns and the ability to sort

1. Member Name (Pharmacy DBA)
2. Account Rep
3. Utilization Manager
4. DEA
5. NCPDP
6. Owner Name
7. Pharmacy State
8. Phone
9. Current Posts (Number of Open postings)
10. Total Posts (Number of Lifetime postings)
11. Member Date
12. 25th Post Date
13. Last Login Date
14. Last Buy Date
15. Last Sale Date
16. Last Post Date

The user should have the following advanced filters

Field Name/Applicable to	MRX 3.0	VM Buyer	VM Wholesaler
DEA	Yes	Yes	
NCPDP	Yes	Yes	
Member Name	Yes	Yes	
Member Legal Business Name	Yes	Yes	Yes
First Name - Any contact	Yes	Yes	Yes
Last Name - Any contact	Yes	Yes	Yes
Group	Yes	Yes	
Source	Yes	Yes	Yes
State	Yes	Yes	Yes
Association	Yes	Yes	
Membership date (Approved date)	Yes	Yes	Yes
Number of locations	Yes	Yes	Yes
Document Status (Pending receipt/ Received/ Approved)	Yes	Yes	Yes
Account Rep (Name of Sales Team/Sales Rep member)	Yes	Yes	Yes
25th Post Date(Date on which the 25th posting (not qty) was done by the member)	Yes		
Last login date	Yes	Yes	Yes

Last buy date	Yes	Yes	
Last sell date	Yes		Yes
Last post date	Yes		Yes
Status - New Registration (Prospect/New/In-process/Pending fin docs/Approved)	Yes	Yes	Yes
MRX 3.0 Status (US 4 - Single Sign on - BR_Account Status)	Yes		
VM Buyer Status (US 4 - Single Sign on - BR_Account Status)		Yes	
VM Wholesaler Status (US 4 - Single Sign on - BR_Account Status)			Yes
Membership workflow (Welcome letter / Welcome pack/ Fedex boxes/ Rookie - Pending Quickstart / Rookie - 120 day on boarding / Rookie / Legacy)	Yes	Yes	Yes
Utilization Manager (Name)	Yes	Yes	
Number of Open postings	Yes		Yes
Number of Lifetime postings	Yes		Yes
Marketplace Access	Yes	Yes	Yes
Company Name (Doing Business as)			Yes
Account Number (unique number created when registration is approved)			Yes
Wholesaler Manager (name)			Yes
State License Number	Yes	Yes	
State License Expiration Date	Yes	Yes	
State License Link (Weblink to state license webpage)	Yes	Yes	
DEA Expiration Date	Yes	Yes	
DEA Link (Link to DEA webpage)	Yes	Yes	

The user should be able to manage the number of results per page (pagination).

BR_List views

The user should also following have the following pre-defined list views

All members

No filter

Active members

MRX 3.0 Status = Category 1 in US 4 - Single Sign on - BR_Account Status OR

VM Buyer Status = Category 1 in US 4 - Single Sign on - BR_Account Status OR

VM Wholesaler Status = Category 1 in US 4 - Single Sign on - BR_Account Status

Suspended by MRX members

MRX 3.0 Status = Suspended by MRX in US 4 - Single Sign on - BR_Account Status OR

VM Buyer Status = Suspended by MRX in US 4 - Single Sign on - BR_Account Status OR

VM Wholesaler Status = Suspended by MRX in US 4 - Single Sign on - BR_Account Status

MRX 3.0 and VM Buyers

Marketplace Access = MRX 3.0 Union VM Buyer

VM Wholesaler

Marketplace Access = VM Wholesaler

Membership Status = Active

The default view for this list view will have the following fields and ability to sort:

1. Company Name (Doing Business as)

2. Account Number
3. Account Rep
4. Wholesaler Manager
5. Primary Contact First Name & Last Name
6. Phone (Not the primary's mobile number instead the company's phone number)
7. Current Posts (Number of Open postings)
8. Total Posts (Number of Lifetime postings)
9. Member Date (approved as member)
10. Last Login Date
11. Last Sale Date
12. Last Post Date

New members

Membership workflow = Welcome letter / Welcome pack/ Fedex boxes/ Rookie - Pending Quick-start / Rookie - 120 day on boarding

Back Office User Access Rules

Page Vibility/User Role	Admin	Accountant	IT	CSR Lead	CSR Team	Sales Manager	Sales Team	Compliance Manager	Marketing	Member Trainer	Utilization Manager	Wholesaler Manager
AccountPage	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

List Views Visibility/User Role	Admin	Accountant	IT	CSR Lead	CSR Team	Sales Manager	Sales Team	Compliance Manager	Marketing	Member Trainer	Utilization Manager	Wholesaler Manager
Active members	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
MRX 3.0 members	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
VM Buyer members	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
MRX 3.0 and VM Buyer	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
VM Wholesaler members	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Suspended members	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
New members	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Fields/User Role	Admin	Accountant	IT	CSR Lead	CSR Team	Sales Manager	Sales Team	Compliance Manager	Marketing	Member Trainer	Utilization Manager	Wholesaler Manager
1. DEA	RE	R	R	R	R	RE	R	RE	R	R	R	R
2. NCPDP	RE	R	R	R	R	RE	R	RE	R	R	R	R
3. Member Name (Pharmacy DBA)	RE	R	R	R	R	RE	R	RE	R	R	R	R
4. Member pharmacy Legal Business Name	RE	R	R	R	R	RE	R	RE	R	R	R	R
5. First Name	RE	R	R	R	R	RE	R	RE	R	R	R	R
6. Last Name	RE	R	R	R	R	RE	R	RE	R	R	R	R
7. Group	RE	R	R	R	R	R	R	R	R	R	R	R
8. Source	RE	R	R	R	R	RE	R	RE	R	R	R	R
9. Pharmacy State	RE	R	R	R	R	RE	R	RE	R	R	R	R
10. Association	RE	R	R	R	R	RE	R	RE	R	R	R	R
11. Membership date (Approved date)	R	R	R	R	R	R	R	R	R	R	R	R
12. Number of locations	RE	R	R	R	R	RE	RE	RE	R	R	RE	RE
13. Document Status (Pending receipt/ Received/ Approved)	RE	R	R	R	R	RE	R	RE	R	R	R	R
14. Account Rep (Name)	RE	R	R	R	R	RE	R	R	R	R	R	R
15. 25th Post Date(Date on which the 25th posting (not qty) was done by the member)	R	R	R	R	R	R	R	R	R	R	R	R
16. Last login date	R	R	R	R	R	R	R	R	R	R	R	R
17. Last buy date	R	R	R	R	R	R	R	R	R	R	R	R
18. Last sell date	R	R	R	R	R	R	R	R	R	R	R	R
19. Last post date	R	R	R	R	R	R	R	R	R	R	R	R
20. Status - New Registration (Prospect/New/In-process/Pending fin docs/ Approved)	RE	R	R	R	R	RE	R	RE	R	R	R	R
21. Membership Status (Active/Suspended/Canceled)	RE	R	R	R	R	RE	R	RE	R	R	R	R

22. Membership workflow (Welcome letter / Welcome pack/ Fedex boxes/ Rookie - Pending Quickstart / Rookie - 120 day on boarding / Rookie / Legacy)	RE	R	R	RE	RE	RE	RE	RE	R	RE	RE	RE
23. Utilization Manager (Name)	RE	R	R	R	R	RE	R	RE	R	R	R	R
24. Number of Open postings	R	R	R	R	R	R	R	R	R	R	R	R
25. Number of Lifetime postings	R	R	R	R	R	R	R	R	R	R	R	R
26. Marketplace Access (MRX 3.0/ VM Buyer / VM Wholesaler)	RE	R	R	RE	R	RE	R	RE	R	R	R	R
27. State License Number	RE	R	R	RE	R	RE	R	RE	R	R	R	R
28. State License Expiration Date	RE	R	R	RE	R	RE	R	RE	R	R	R	R
29. State License Link	R	R	R	R	R	R	R	R	R	R	R	R
30. DEA Expiration Date	RE	R	R	RE	R	RE	R	RE	R	R	R	R
31. DEA Link	R	R	R	R	R	R	R	R	R	R	R	R

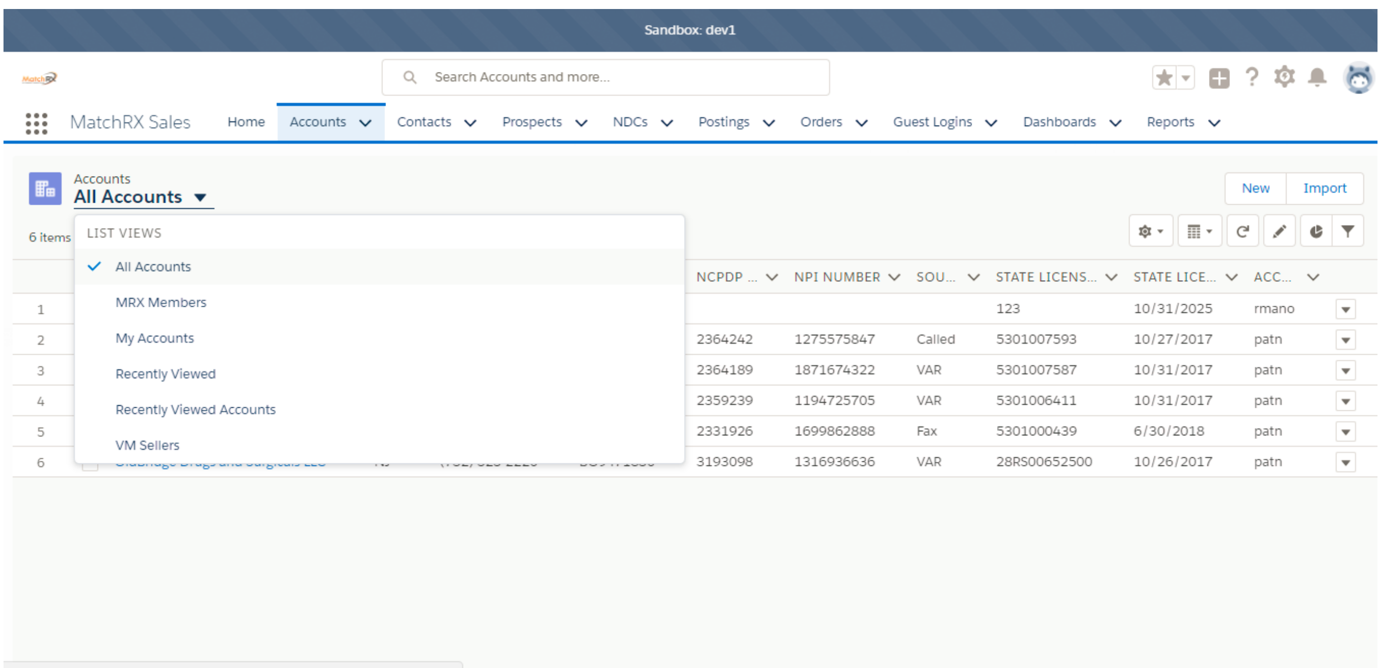
R - Read   E - Edit   None - Not visible

Acceptance Criteria

Account page

1. has the correct default columns
2. has the mentioned advanced filters
3. edit access is correctly defined
4. List views are visible to all user roles

Screen Prototype



US 14 - MRX 3.0 My Postings and Edit a posting

WBS #								
	Key	**Summary**	**Updated**	**Due**	**Assignee**	**Status**	**Resolution**	**Sprint**
	MRX-409	MRX-UAT(Cycle2): Changes Related to My Posting Screen.	Oct 03, 2018 10:33		Ramkumar	HOLD	Unresolved	
	MRX-382	MRX-PHP: UAT(cycle2) Issue in posting.	Sep 19, 2018 11:58		Ramkumar	CLOSED	Unresolved	
	MRX-350	MRX-PHP_UAT: Issues Related to Post an Item	Aug 27, 2018 12:10		Ramkumar	CLOSED	Unresolved	
	MRX-307	MRX_PHP: UAT Issues in Vacation mode(Aug 9).	Aug 10, 2018 13:21		samuel jeya singh	CLOSED	Unresolved	
	MRX-303	MRX_PHP: UI UAT issue Day4.(AUG 9)	Sep 03, 2018 10:52		samuel jeya singh	CLOSED	Unresolved	
	MRX-22	MRX-Edit Posting -Detail Page	Aug 27, 2018 09:49		Ramkumar	IN STAGING	Unresolved	Sprint 2
	MHX-1368	Web - UAT Bugs - Sep 21	Sep 26, 2018 23:44		Ramprakash	OPEN	Unresolved	
	MHX-1365	SF - UAT Bugs - Sep 21	Oct 04, 2018 05:04		Swapna.Patnaikuni	REWORK IN PROGRESS	Unresolved	
	MHX-1360	Web - UAT Bugs - Sep 13	Sep 14, 2018 19:01		Raja Ponnuswamy	OPEN	Unresolved	
	MHX-1356	SF - UAT Bugs - Aug 22	Sep 26, 2018 23:54		Swapna.Patnaikuni	REWORK IN PROGRESS	Unresolved	
	MHX-1344	UI - UAT Bugs - Aug 9	Sep 23, 2018 19:14		Ramprakash	RESOLVED	Unresolved	
	MHX-1343	Web - UAT Bugs - Aug 9	Sep 23, 2018 19:08		Ramprakash	RESOLVED	Unresolved	
	MHX-1019	Web 16 March	Sep 10, 2018 07:04		Karthigaichamy Malaimegam	HOLD	Unresolved	
	MHX-990	WBS 31 - Web - My posting & edit posting	Mar 23, 2018 07:46		samuel jeya singh	RESOLVED	Unresolved	
	MHX-741	CLONE - WBS 31: PHP Edit posting	Mar 16, 2018 08:24		Poovarasan	IN STAGING	Unresolved	Sprint 6
	MHX-38	WBS 31: PHP Edit posting	Aug 22, 2018 11:13		rajasekar.jeyakumar@htcindia.com	PROD READY	Unresolved	Sprint 4
	16 issues							
Document status	APPROVED							
Document owner	Raghul Manoharan							
UI Developer								
Developers								
QA								

Table of Contents

User Story

As a registered user of MRX 3.0, I want the view all my open posting and the ability to edit a posting so that I can change the details of a posting

End Objective:	To provide a page for registered users to view and edit their postings
User/Actor:	Primary users and Secondary users of MRX 3.0
Program Type:	Webpage with Form
Trigger:	Click on "Sell" Menu
Related User Story:	US 8 - MRX 3.0 & Mobile - Post an item
Related WBS #:	31

Related WBS description

31	Scenario 1: As a pharmacy user, I want to be able to edit my posting and to delete it. I want the system to notify me on success or failure. Member cannot edit an open posting for a full bottle and change to a partial pack. Must delete original posting and create new. When changing price and/or qty, current WAC is used in calculation, not WAC from original posting. Item should be displayed at the top of the marketplace when saved. When user clicks on edit in "my posting", notify user that WAC price will be updated if user enters edit screen. Confirm before continuing. Scenario 2: In the page, "Manage - > My posting", The user should also have the ability to edit the price, qty, lot # and expiration date without opening the full edit form of the order. The user should be able to edit in the page within the list of orders page. If editing price, the compare pricing feature (from WBS #30 above) should display to assist the member in setting the new price. Refer Google drive link mentioned in the notes.

Business Rules

My postings

This page will be part of the "Sell" menu and it will list all the open postings of a particular member in a grid. The grid will have the following fields. While editing a posting in "My postings" page, all business rules mentioned in user story - US 8 - MRX 3.0 & Mobile - Post an item is applicable for this page. On top of that, the follow rules should be implemented.

Field Name	Rules
☐ (Check box)	Selection - User can check/uncheck to select the posting. The user should be able to select all postings on the page by click on the check box in the header. Edit button - User can click and it will redirect the user to "Edit a posting" page
Drug Name	User cannot edit
NDC	User cannot edit
Lot #	User can edit
Expiration Date	User can edit. Calendar option to choose the month and year. The month has to be in the future unless the original expiry date is the current month.
Packaging	User cannot edit
Available Quantity	User can edit.

Price	User can edit. Marketplace comparison table should popup near the field to help the user decide on the price. While editing any field, if the WAC discount % is less than 10%, the user is forced to change the price to make WAC discount % greater than or equal to 10% of WAC to save the edit. The price field outer frame should become red. The value should be grey in the background and the user should be able to enter new value. When the user clicks outside a field and if the price is below 10% of WAC or less than $2.00, display the below error message as pop up: *Pack Price should be at least 10% below WAC.* *Items must be listed for $2.00 or more.*
WAC discount	User cannot edit. Calculated based on the most recent WAC price
Last Modified	User cannot edit. System should generate. The posting should be sorted by last modified field (~~newest~~ oldest first) but the postings which have less than 10% WAC discount (lowest first) will be at the top.

The user should be able to

1. Select multiple postings
2. Sort using all the above fields except Packaging option and Lot #. The user should be able to sort based on Operations fields. ~~Irrespective of the sorting, the postings which have less than 10% WAC discount (lowest first) should be at the top. The sort rule should be applied to the rest of the items.~~ Once the user uses only of the sort options, the default rule of items with WAC % less than 10% at the top should not be applied. The user has to exit and revisit the page to have the default sort displayed. If the WAC discount is less than 0%, display 0%. This message should be displayed on top of the table "Postings with WAC discount of less than 10% will not display in the marketplace. Adjust the WAC discount to 10% or more."
3. Options to select all postings (display number of postings selected), select none and delete selected postings
4. Search by drug name and NDC
5. Print selected open postings as a report with above fields
6. Export selected open postings as a report with above fields (file format: My postings export.xlsx)

The page should have pagination at the bottom of the page

- "number of items per page" drop-down menu (10/25/50/100/200 items per page) - Default value 100
- navigation between pages
- sum-up ("X to YYY. Page A of B.").

Vacation Mode button

A member will be able to temporarily hide all of their postings from the marketplace. The member should choose the start date and end date. The member cannot choose to hide postings selectively.

This should be a button on the top of the page. If vacation mode is set, display the button in a different color and display the start and end date. When the button is clicked, it should popup with the content,

"Temporarily hide your postings from the marketplace by choosing Start and end date"

and display the following fields

Start date: Calendar option - has to be current date or a future date

End Date (including): Calendar option - has to be current date or a future date and has to be same or after start date.

Confirm button.

Once the user sets the vacation mode, the user will be able to change the start date and the end date. without turning off the vacation mode and see the below message

"You are currently in vacation mode and your postings are temporarily hidden from the marketplace. Your postings will be visible on (end date + 1}".

The user will also have the option to turn off the vacation mode.

The user will be able to set only one set of vacation dates.

BO user should also be able to do it from Salesforce screen on behalf of the member.

Edit a posting

The user will land in this page, when the user clicks on edit in the "My postings" page or on the "My posting" button on the "Buy" menu. This page will be very similar to the post an item page (US 8 - MRX 3.0 & Mobile - Post an item) with certain fields disabled for editing. All business rules mentioned in user story - US 8 - MRX 3.0 & Mobile - Post an item is applicable for this page. On top of that, the follow rules should be implemented.

Field Name	Rules
NDC	User will not be able to edit
Lot Number	User can edit
Exp Date	User can edit. The month has to be in the future unless the original expiry date is the current month. Calendar option to choose the month and year.
Pack Qty	User can change from full to partial but not partial to full. Once the user changes from full to partial, the fields "available qty" and "Price" should become blank. The user should enter values in those fields to save. If the user closes the browser without entering those fields, the packaging change should not be saved. User can change the quantity if it is full and sealed. User can change the quantity if it is partial.
Price Option	User can switch between Fixed and declining
Pack Price	User can edit. The current WAC is used in calculation, not the WAC from original posting. Marketplace comparison table will also be updated based on current information. While editing any field, if the WAC discount % is less than 10%, the user is forced to change the price to make WAC discount % to greater than or equal to 10% of WAC to save the edit. The price field outer frame should become red. The value should be grey in the background and the user should be able to enter new value. When the user edits a posting with declining price, the max price displayed should be the current price shown in the marketplace and not the original Max price. There is a possibility that the minimum price is not at least 20% less than the current price. As long as the user is not changing the Max or Min price, that should be allowed. If the user changes either the Max or Min price, the system should provide an error if the Min price is not at least 20% less than current price. e.g. User originally posted an item with Max = $100 and Min = $70. When the user tries to edit the posting after four weeks, the editing page will show Max price = $80 and Min = $70, If the user did not change Max or Min price, the update of posting should be allowed even though the Min price is not at least 20% less than Max price. if the user changes the Max price to say $75, the system should display an error that Min price has to be at least 20% less than Max price.
WAC discount slider	The position of the WAC slider will be based on the current WAC price. User will be able to use it
Package Condition	User will be able to switch from "Original Package - Non sealed" to "Original Package - sealed" and vice versa. User will be able to check/uncheck Torn package label Sticker/Glue residue "X" on container Writing on container and edit the "other" field
Pay for Shipping	User can edit
Shipping Method	User can edit
Order Sticker	User can order
Pictures	User can remove/add user uploaded pictures

When the user clicks "Update Posting", the item should be displayed at the top of the "Buy - All postings" page. The user should be redirected to "My posting" page or "Buy" menu (depending on how the user reached the edit a post page)

The user should have the option to Delete the posting. When clicked on "Delete Posting", the user should be provided this message and asked to confirm "Do you want to delete this posting?". If the user confirms, the user should be redirected to "My posting" page or "Buy" menu (depending on how the user reached the edit a post page)

In case of web, The user should also have the option to cancel the editing process and return to "My posting" page or "Buy" menu (depending on how the user reached the edit a post page) by clicking the "Cancel" button. In mobile, the user should be able to cancel the editing process by clicking "Back" and return to "My posting" page or "Buy" menu (depending on how the user reached the edit a post page).

BR_database

Each posting will have a unique posting ID. When a posting is updated, the history of previous values should be stored in the history field as a JSON script.

BR_Edit when item was ordered

A seller should be able to edit a posting even if an order related to the posting is currently in the order life cycle or an order related to the posting has completed. In either scenario, the details of the order that was placed before the posting changes should not be changed but orders that are placed after the posting is updated should be based on the updated values.

BR_Edit when item in cart

If a seller edits an item that is in the cart of a buyer, the buyer has to be notified that there is a change to the item when the buyer navigates to the checkout page next time.

The system should also validate when an order is being placed, if a posting has been updated between the time the buyer was in the checkout page and placing the order. If the posting has changed, the order should not be processed. The system should show the checkout page with the below message and the user has to place the order again if the item is still available.

"Item(s) in your cart have changed/removed. Please review and submit order again" (when one or more items have been changed or removed by sellers)

"The seller has informed us that the item is no longer available" (when all items in the cart have been removed by sellers)

Acceptance Criteria

My postings page:

1. The user is able to do in-line editing for the fields Lot #, Exp. date, Qty and Price
2. The user is able to sort the posting using all the fields except Packaging and Lot #
3. The user is able to sort based on Operations fields
4. The user is able to search based on NDC and drug name
5. The user is able to select multiple posting and delete, print and export.
6. The user is able to select all postings and select none
7. The user is able to set vacation settings
8. The vacation mode turns off after the last day of vacation schedule.

Edit a posting page:

1. The user is able to edit the fields based on the rules mentioned.
2. If the user clicked "My postings" button from Buy marketplace, the user should be redirected to Buy marketplace page after clicking Update or Cancel button.
3. If the user clicked "My postings" button from My postings page, the user should be redirected to My posting page after clicking Update or Cancel button.
4. The system should show the message Do you want to delete this posting?", when a user deletes a posting
5. When a user updates an posting which has a open order in life-cycle, the order should not be updated.
6. When a user updates an posting which has a completed order, the order should not be updated.
7. When a user updates an posting which has been placed in the cart by another user, the user should receive either of the message

   "Item(s) in your cart have changed/removed. Please review and submit order again" (when one or more items have been changed or removed by sellers)

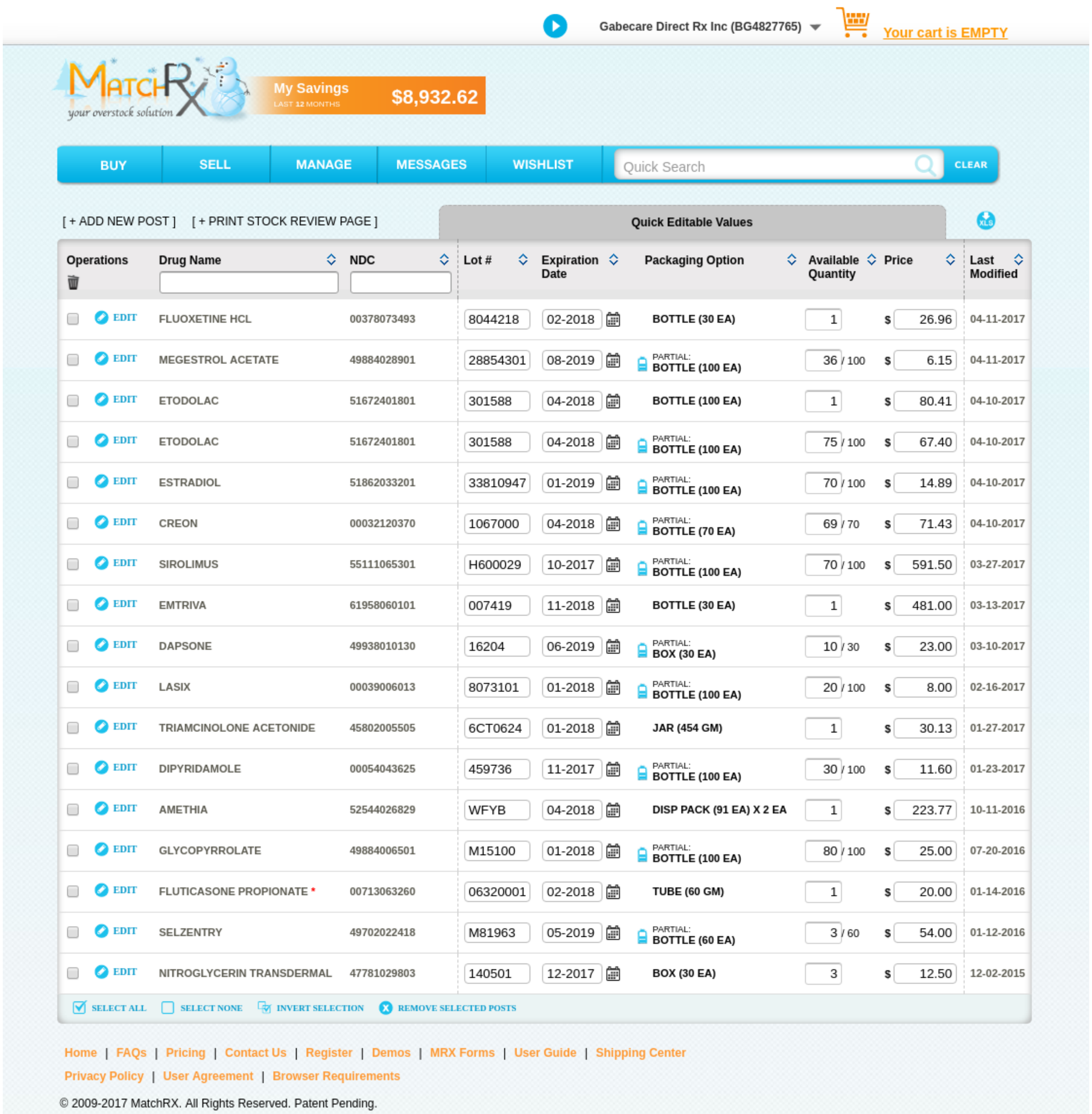
   "The seller has informed us that the item is no longer available" (when all items in the cart have been removed by sellers)

My posting page - Inline editing requirement (June 12, 2018)

1. The columns will remain the same as listed above.
2. The page will not have pagination. All postings will be listed on the same page. The header will not scroll with the page.
3. The posting should be sorted by last modified field (~~newest~~ oldest first) but the postings which have less than 10% WAC discount (lowest first) will be at the top.
4. Sort using all the above fields except Packaging option and Lot #. The user should be able to sort based on Operations fields. ~~Irrespective of the sorting, the postings which have less than 10% WAC discount (lowest first) should be at the top. The sort rule should be applied to the rest of the items.~~ Once the user uses one of the sort options, the default rule of items with WAC % less than 10% at the top should not be applied. The user has to exit and revisit the page to have the default sort displayed
5. When there is at least one posting with WAC % less than 10%, this message should be displayed on top of the table "Postings with WAC discount of less than 10% will not display in the marketplace. Adjust the WAC discount to 10% or more."
6. WAC% field should be in red font if the WAC % is less than 10% for the posting.
7. When the user updates the price and if the WAC % is changed from less than 10% to 10% or more, the red font should be changed to green. The green font should be displayed only till the user stays on the page. The green font should turn black if the user goes to a different page and returns to "My posting" page.
8. The last modified date of the posting should be
    a. red font - if the current date is more than 90 days compared to last modified date
    b. black font - if the current date is equal to or less than 90 days compared to last modified date
    c. green font - if the posting has been modified by the user. The green font should be displayed only till the user stays on the page. The green font should turn black if the user goes to a different page and returns to "My posting" page.
9. When the user edits a field, the system has to autosave the value every 20 ms, even as the user continues to type. The entered value has to be saved even when the user hits the "Esc" key on the keyboard. This point is not applicable for expiry date field alone as it is going to a calendar option to choose the month and year.
10. When the user updates a field, the background of the field should be yellow. When the user updates and exits the field, the background of the field should be changed to green.
11. The user should only be allowed to enter the valid datatype. If the user types an invalid character, the field should not display the character.
    a. Lot number - Uppercase Alphanumeric (min 1, max 12). If the user enters lowercase, the system has to convert and display uppercase.
    b. Expiry date - Calendar option only. Current and previous months should be disabled. If the user hits "Esc" or outside the field, the older value is retained.
    c. Packaging condition - If it is partial pack, the field is editable with a box. Only numbers are allowed. If it is full pack, it is not editable. If the value entered is invalid, the system should display a message "invalid" next to the field. The user will have the ability to exit the page with the error. The system should not save the new value.
    d. Qty available - If it is partial pack, the field is not editable. If it is full pack, it is a drop down with the max value as allowed per the brand/generic rule, posting and order history.
    e. Price - Only numbers are allowed. When the user is on this field, the slider and marketplace comparison table should be displayed. The user can either enter the value or use the slider to set the price. If the price is invalid, the system should show a message "invalid". If the user exits the field, the value entered in the field is saved as long as it is a valid value.The user will have the ability to exit the page with the error. The system should not save the new value.
    f. The user will not have the option to undo any of the values entered.
12. The user should be able to export selected open postings as a report with all fields (file format: My postings export.xlsx with expiry date as the end of the month and not 15th)

Screen Prototype

My postings page



Gabecare Direct Rx Inc (BG4827765)

Your cart is EMPTY

MatchRX your overstock solution

My Savings LAST 12 MONTHS $8,932.62

BUY | SELL | MANAGE | MESSAGES | WISHLIST | Quick Search | CLEAR

[+ ADD NEW POST] [+ PRINT STOCK REVIEW PAGE]

Quick Editable Values

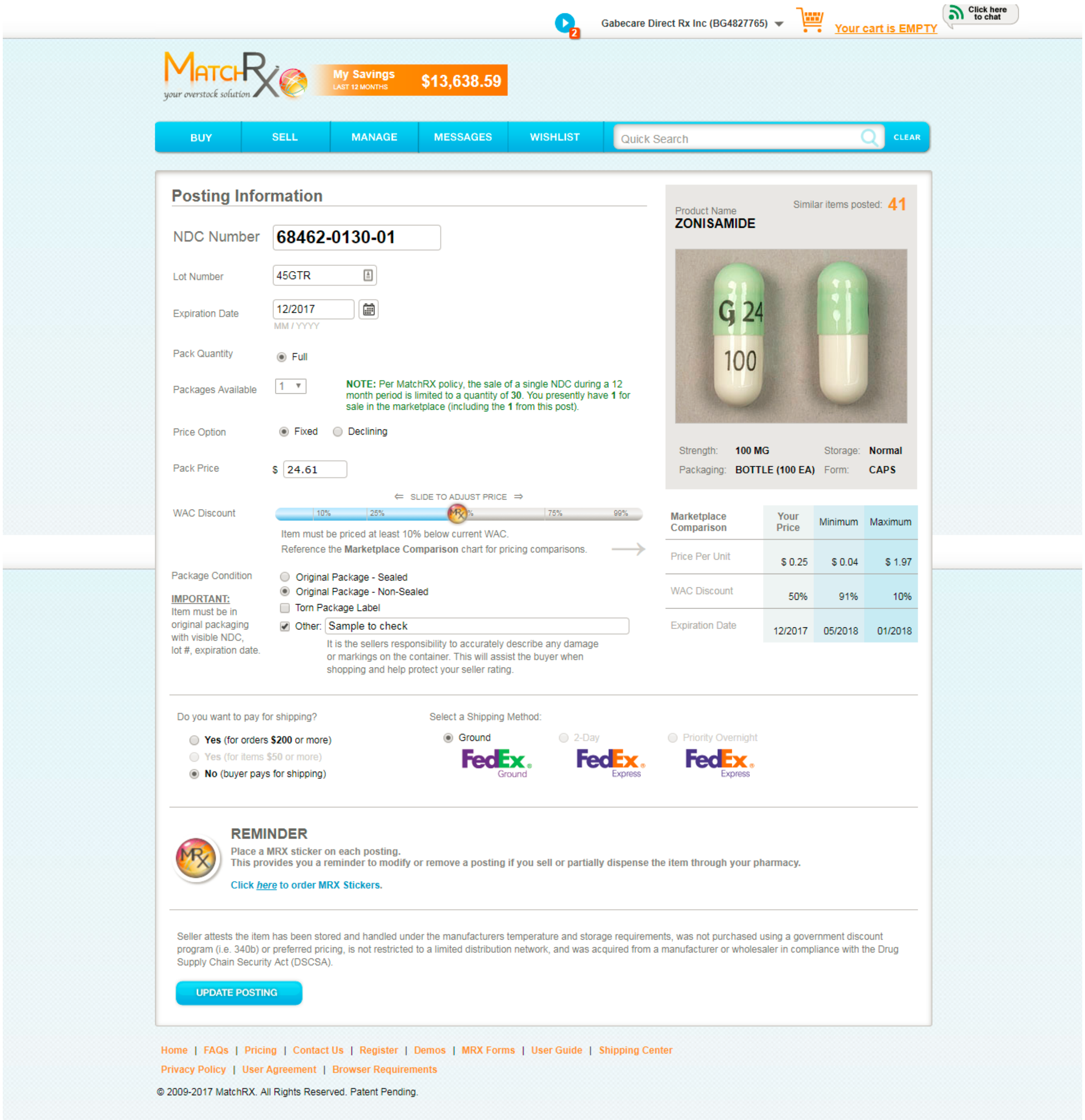
Operations	Drug Name	NDC	Lot #	Expiration Date	Packaging Option	Available Quantity	Price	Last Modified
EDIT	FLUOXETINE HCL	00378073493	8044218	02-2018	BOTTLE (30 EA)	1	$ 26.96	04-11-2017
EDIT	MEGESTROL ACETATE	49884028901	28854301	08-2019	PARTIAL: BOTTLE (100 EA)	36 / 100	$ 6.15	04-11-2017
EDIT	ETODOLAC	51672401801	301588	04-2018	BOTTLE (100 EA)	1	$ 80.41	04-10-2017
EDIT	ETODOLAC	51672401801	301588	04-2018	PARTIAL: BOTTLE (100 EA)	75 / 100	$ 67.40	04-10-2017
EDIT	ESTRADIOL	51862033201	33810947	01-2019	PARTIAL: BOTTLE (100 EA)	70 / 100	$ 14.89	04-10-2017
EDIT	CREON	00032120370	1067000	04-2018	PARTIAL: BOTTLE (70 EA)	69 / 70	$ 71.43	04-10-2017
EDIT	SIROLIMUS	55111065301	H600029	10-2017	PARTIAL: BOTTLE (100 EA)	70 / 100	$ 591.50	03-27-2017
EDIT	EMTRIVA	61958060101	007419	11-2018	BOTTLE (30 EA)	1	$ 481.00	03-13-2017
EDIT	DAPSONE	49938010130	16204	06-2019	PARTIAL: BOX (30 EA)	10 / 30	$ 23.00	03-10-2017
EDIT	LASIX	00039006013	8073101	01-2018	PARTIAL: BOTTLE (100 EA)	20 / 100	$ 8.00	02-16-2017
EDIT	TRIAMCINOLONE ACETONIDE	45802005505	6CT0624	01-2018	JAR (454 GM)	1	$ 30.13	01-27-2017
EDIT	DIPYRIDAMOLE	00054043625	459736	11-2017	PARTIAL: BOTTLE (100 EA)	30 / 100	$ 11.60	01-23-2017
EDIT	AMETHIA	52544026829	WFYB	04-2018	DISP PACK (91 EA) X 2 EA	1	$ 223.77	10-11-2016
EDIT	GLYCOPYRROLATE	49884006501	M15100	01-2018	PARTIAL: BOTTLE (100 EA)	80 / 100	$ 25.00	07-20-2016
EDIT	FLUTICASONE PROPIONATE *	00713063260	06320001	02-2018	TUBE (60 GM)	1	$ 20.00	01-14-2016
EDIT	SELZENTRY	49702022418	M81963	05-2019	PARTIAL: BOTTLE (60 EA)	3 / 60	$ 54.00	01-12-2016
EDIT	NITROGLYCERIN TRANSDERMAL	47781029803	140501	12-2017	BOX (30 EA)	3	$ 12.50	12-02-2015

SELECT ALL | SELECT NONE | INVERT SELECTION | REMOVE SELECTED POSTS

Home | FAQs | Pricing | Contact Us | Register | Demos | MRX Forms | User Guide | Shipping Center

Privacy Policy | User Agreement | Browser Requirements

Edit a posting page



US 15 - Mobile Login

WBS #	Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint

MRX-320	Mobile-UAT-WBS 125 When attempting to log into mobile as VM only buyer, message stating login not recognized displayed correctly. Remove the extra space in the phone number.	Aug 22, 2018 06:28	rajasekar.jeyakumar@htcindia.com	CLOSED	Unresolved	Sprint 1
MHX-573	WBS 125: Mobile Login (Contd..) A mobile user should be not logged out from the app if the user exits the app or kills the app.	Mar 06, 2018 10:29	Maguesh Balakrishnan	IN STAGING	Unresolved	Sprint 5
MHX-445	WBS#125 - Validation Message content to be reviewed	Dec 05, 2017 06:01	Jansi Venkataramanujam	CLOSED	Unresolved	Sprint 2
MHX-444	WBS#125 - Remember DEA# and username workflow definition	Nov 28, 2017 10:34	Jansi Venkataramanujam	CLOSED	Unresolved	Sprint 2
MHX-442	WBS#125 - Please explain the forgot password workflow	Nov 28, 2017 10:42	Jansi Venkataramanujam	CLOSED	Unresolved	Sprint 2
MHX-440	WBS#126 - My Orders - It will be one level tab by clicking which will show two tabs(segment) - Sales in progress and Purchase in progress. Please confirm	Nov 28, 2017 10:39	Jansi Venkataramanujam	CLOSED	Unresolved	Sprint 2
MHX-439	WBS#126 - In case of Open order in both sales in progress and purchase in progress,we should display Sales in progress as the landing page	Nov 28, 2017 10:43	Jansi Venkataramanujam	CLOSED	Unresolved	Sprint 2
MHX-437	WBS#125 - As discussed , in login page we will only check the empty validation for the Password field, as 2.0 users may login to mobile app	Nov 28, 2017 10:44	Jansi Venkataramanujam	CLOSED	Unresolved	Sprint 2
MHX-436	WBS#125 - Remember username - Please explain the expected functionality	Nov 28, 2017 10:45	Jansi Venkataramanujam	CLOSED	Unresolved	Sprint 2

	MHX-435	WBS#125 - DEA number format - We assume lowercase alphabets are not allowed. please confirm	Nov 28, 2017 10:45	Jansi Venkataramanujam	CLOSED	Unresolved	Sprint 2
	MHX-398	WBS#125 - Local validation and web service call will happen on submitting the form not field level in the screen	Nov 28, 2017 10:46	Jansi Venkataramanujam	CLOSED	Unresolved	Sprint 2
	MHX-394	WBS#125 - Do we have finalized list of static pages required in mobile app ?	Nov 28, 2017 10:47	Jansi Venkataramanujam	CLOSED	Unresolved	Sprint 2
	MHX-362	WBS#125 - Since the mobile application doesn't have any Signup page are we going to provide any static message to the new user to use the web application for Sign up.	Nov 28, 2017 10:38	Maguesh Balakrishnan	CLOSED	Unresolved	Sprint 2
	MHX-60	WBS 125: MATCHRX 3.0 MOBILE Login	Dec 26, 2017 16:49	Maguesh Balakrishnan	CLOSED	Unresolved	Sprint 2
	MHX-31	WBS 126: MatchRX Mobile: Landing Page after Log in	Dec 26, 2017 16:46	Maguesh Balakrishnan	CLOSED	Unresolved	Sprint 2
	15 issues						

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered active user of MRX 3.0, I want the ability to login using mobile app so that I can access on the go.

End Objective:	To provide a screen for the registered active users to enter their login credentials on mobile app
User/Actor:	All registered active users of MRX 3.0
Application:	MRX 3.0

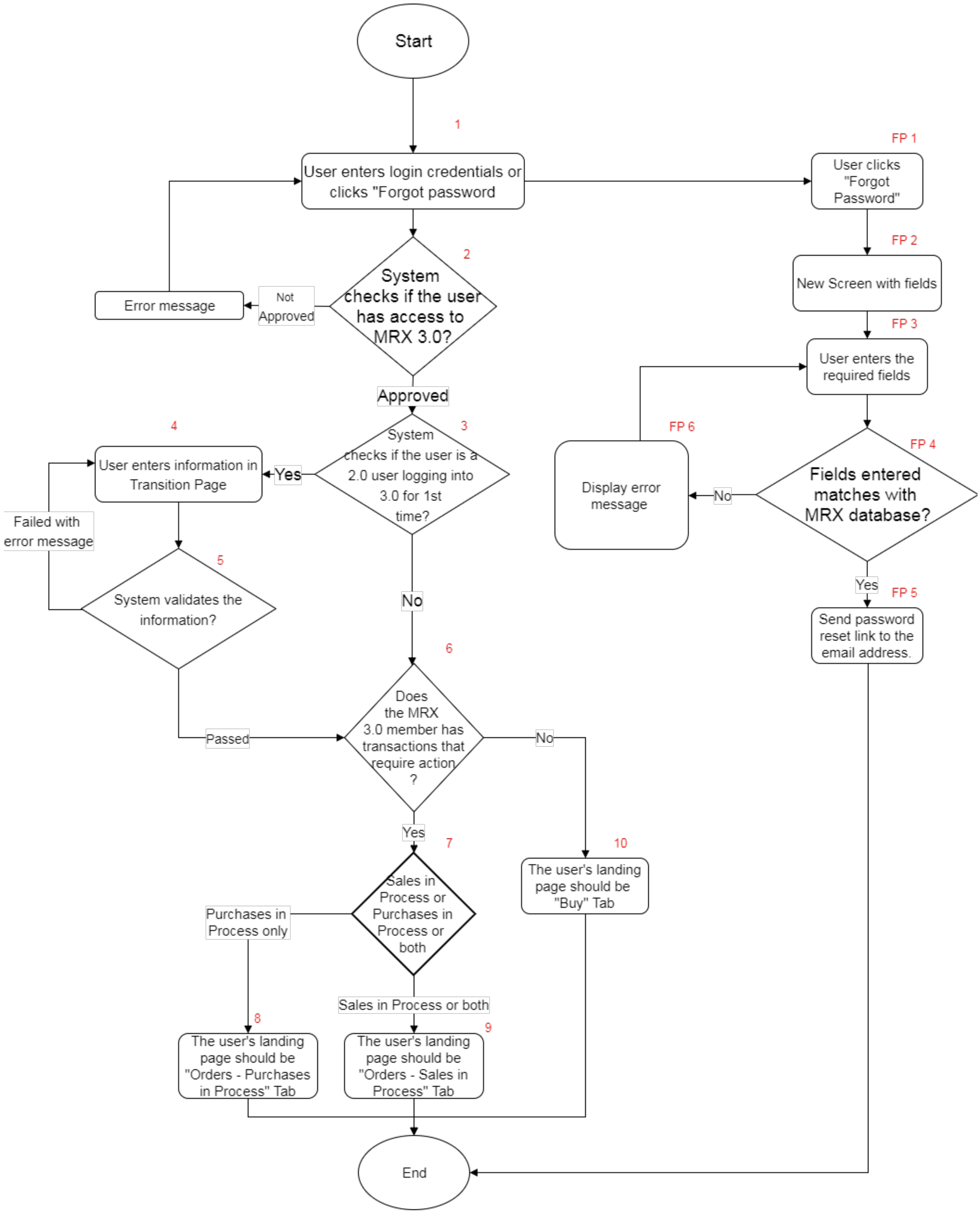
Trigger:	Default screen if not logged in
Related User Story:	US 4 - Single Sign on
Related WBS #:	125, 126

Related WBS Description:

125	Only registered pharmacy user could login. Same credentials used for accessing 3.0 FO. No option to sign up. Forget password option will be available.
126	If there is an open order requiring action, the landing page will be "Order" tab. If not, landing page will be "Buy" tab

Flow Chart

Mobile Login



Preconditions

Application: MatchRX 3.0 mobile app **Navigation**: When user not logged in MatchRX 3.0 mobile app **User Status:** Registered and Active MRX 3.0

Mobile Login Flow:

1. The screen displays the fields mentioned in US 4 - Single Sign on - DF_Pharmacy Login with the message (BR_Mobile Transition Page) and the link "Forgot Password". The user should have the "remember username" option to save username and DEA of the last logged in user. . If the user clicks "Forgot password", skip to Mobile Forgot Password flow. Else the users enters the information and clicks "Submit" which proceeds to next step.
2. The system checks in MRX DB if the information provided has access to MRX 3.0. If the user is a VM buyer only, then display the message "*At this time, the MatchRX VM is not accessible via mobile applications. Thank you."* and goes back to Step 2. If the user doesn't have access MRX 3.0 or VM, then the user is shown the error message (US 4 - Single Sign on - BR_Error Message) and goes back to Step 2. Else proceed to next step 3.
3. The system checks if the user is a MRX 2.0 user and logging in for the first time in 3.0 (irrespective of whether it is web or mobile). If yes, proceed. Else skip to step 6.
4. The system display the "BR_ Mobile Transition Page" and the user enters the information.
5. The system validates the information. If yes, proceed. Else repeat step 5.
6. The system checks if the user has any transaction that requires action from the user (US 4 - Single Sign on - BR_Transactions requiring action). If yes, proceed to next step. Else skip to step 10.
7. The system checks if the user has transactions in "Sales in process" or "Purchases in process" or both. If "Purchases in process" only, then proceed to next step. Else skip to step 9.
8. The system should redirect the user to MRX 3.0 "Orders - Purchases in process" page and the flow ends.
9. The system should redirect the user to MRX 3.0 "Orders - Sales in process" page and the flow ends.
10. The system should redirect the user to MRX 3.0 "Buy" page and the flow ends.

Mobile Forgot Password flow:

1. The user clicks on "Forgot Password"
2. The user is shown a screen with the fields mentioned in US 4 - Single Sign on - DF_Pharmacy Forgot Password.
3. The user enters the information.
4. The systems checks if the information provided has access to the MRX 3.0 application. If yes, proceed to next step. Else skip to step 6.
5. The system will send a link to the email address to reset the password US 4 - Single Sign on - BR_Forgot Password and the flow ends.
6. If the user is a VM buyer only, then display the message "*At this time, the MatchRX VM is not accessible via mobile applications. Thank you."* and goes back to Step 3. If the user doesn't have access MRX 3.0 or VM, then the user is shown the error message (US 4 - Single Sign on - BR_Error Message) and the user has to re-enter the information. Repeat from Step 3.

Business Rules

BR_Mobile Transition Page

The login popup will have a question mark next to the username field. When the user clicks on that question mark, following message will pop up to guide the existing MRX 2.0 user to enter the pre-created username
If you do not have a username, enter first initial lastname (eg. John Smith's username is jsmith)

Once the user logs in, display the below message and the contents of the below page
We've updated and added new services to MatchRX! Follow the steps below to finalize your individual username and password.

Update user name: prepopulated and editable

Change password:

Confirm password:

Update email address: prepopulated and editable

The reason to have such a screen can be found at US 4 - Single Sign on - BR_MRX2.0 User Transition.

BR_Automatic Logout

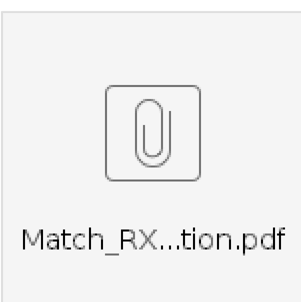
A mobile user should be not logged out from the app if the user exits the app or kills the app. The user should be required to log in again only when the app is uninstalled and reinstalled or the user has logout from the app.

Acceptance Criteria

1. The following types of users are able to successfully login using Mobile login:
    a. MRX 3.0 only
    b. MRX 3.0 and VM Buyer
2. The VM vendor is NOT able to login using Mobile login
3. The VM buyer only is NOT able to login using Mobile login
4. A pharmacy user is able to successful reset the password using "Forgot Password" in Mobile login.
5. A VM vendor is NOT able to successful reset the password using "Forgot Password" in Mobile login
6. A VM buyer only is NOT able to successful reset the password using "Forgot Password" in Mobile login
7. The user receives the correct error message when incorrect information is provided during:
    a. Login
    b. Forget password
8. The following types of users with orders requiring action in "Purchases in process" is taken to the MRX 3.0 " Order - Purchases in process" tab after login
    a. MRX 3.0 only
    b. MRX 3.0 and VM Buyer
9. The following types of users with orders requiring action in "Sales in process" is taken to the MRX 3.0 " Order - Sales in process" tab after login
    a. MRX 3.0 only
    b. MRX 3.0 and VM Buyer
10. The following types of users with orders requiring action in both "Purchases in process" and "Sales in process" is taken to the MRX 3.0 " Order - Sales in process" tab after login
    a. MRX 3.0 only
    b. MRX 3.0 and VM Buyer.
11. A MRX 3.0 only user without orders requiring action is taken to the MRX 3.0 " Buy" tab after login
    a. MRX 3.0 only
    b. MRX 3.0 and VM Buyer
12. A MRX 2.0 user logging in for the first time in MRX 3.0 should be able to log in with default username and redirected to BR_ Mobile Transition Page.

Screen Prototype

Page 1:
Question mark icon next to username to provide message mentioned in BR_Mobile Transition Page



US 16 - Mobile Hamburger Menu & Pharmacy Info

WBS #	

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-441	WBS#128 - Pharmacy info will not have bank details displayed in mobile app	Nov 28, 2017 10:38		Jansi Venkataramanujam	CLOSED	Unresolved	Sprint 2
MHX-438	WBS#127 - Are we going to get the list of menu items from web service? Whether the list of menu items going to change based on the user type?	Nov 28, 2017 10:43		Jansi Venkataramanujam	CLOSED	Unresolved	Sprint 2
MHX-33	WBS 128: MatchRX Mobile Pharmacy info	Dec 26, 2017 16:48		Maguesh Balakrishnan	CLOSED	Unresolved	Sprint 2
MHX-32	WBS 127: Hamburger Menu	Dec 26, 2017 16:46		Maguesh Balakrishnan	CLOSED	Unresolved	Sprint 2

4 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered active user of MRX 3.0 mobile app, I want to a menu so that I can navigate and "Pharmacy Information" section so that I can view the information.

End Objective:	A menu for the user to navigate within the app and a section to provide pharmacy related information
User/Actor:	Registered Primary and Secondary user of MRX 3.0
Program Type:	Mobile App
Trigger:	Hamburger icon on the left side of the app once logged in
Related User Story:	US 6 - Pharmacy/VM Wholesaler Menu
Related WBS #:	127, 128

Related WBS description:

127	This Menu will list the tabs (e.g. Buy, Sell, Order, Manage). Sub-lists for options under each tab (e.g. My profile under Manage)

128	Display brief info about a pharmacy i am logged in. (Name, Address, Owner. That's it to simplify view for mobile) The information provided during registration.

Business Rules

Menu Master for Mobile:

Level 1 on Hamburger menu	Level 2 as Tabs	
Buy	All Postings	
	My Previous Purchases	
	Items In My Wishlist	
Sell	Post New Item	
	My Postings	
My Orders (notification number)	Sales in Process	Action Required (number)
		Open Orders (number)
	Purchases in Process	Action Required (number)
		Open Orders (number)
	~~History~~	
~~My Dashboard~~	~~Match Money~~	
	~~Seller Rating~~	
	~~TBD~~	
My Wishlist		
My Account	Pharmacy Info	
Settings		
Logout		

Pharmacy Information

Mobile app should display the same information that is displayed on web - US 6 - Pharmacy Menu - Pharmacy Information

Notifications

The mobile user should be able to switch push notifications on and off. The user is expected to receive the selected push notifications whenever logged in. The user should not receive a notification when not logged in the mobile app. When logging in, the user should not receive the notifications that were pushed by the server when the user was not logged in. The notification settings will be synced across the devices (e.g. The user switches on Payment notification setting in device 1. The user logs into Device 2 and switches off payment notification setting. The settings will be synced across devices and the payment notification setting will be switched off in device 1 as well.) Refer US 6 - Pharmacy Menu - BR_Notification for the list of notification types and triggers for the mobile app.

The mobile app user will have the below options under the "Settings" menu.

Notification Name	Toggle
When Selling	
Order Activity	On/Off

Payment Notification	On/Off
When Buying	
Order Activity	On/Off
Delivery Notification	On/Off

Log out

When a user clicks on logout, the user should be logged out.

Acceptance Criteria:

A user logged in should be able to:

- Navigate within the app using the options mentioned in Menu master
- View Pharmacy information
- Change the four types of push notifications
- log out

Screen Prototype

1. Menu

US 17 - MRX 3.0 Buy Menu

WBS #	
	(see issues table below)

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-825	CLONE - WBS 42: PHP Additional Sorting and Filters	Mar 07, 2018 07:48		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 6
MHX-247	WBS 42: PHP Additional Sorting and Filters	Mar 07, 2018 07:44		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 5
MHX-136	WBS 48: PHP Order[Display item from Same seller]	Mar 09, 2018 07:32		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 6
MHX-135	WBS 47: PHP Order[Display Add to cart in 3 versions]	Mar 09, 2018 07:32		Varun Sankaranarayana	IN STAGING	Unresolved	Sprint 6
MHX-108	WBS 40: PHP Grid to Export	Mar 07, 2018 07:38		Divyalakshmi	IN STAGING	Unresolved	Sprint 4
MHX-107	WBS 42: PHP Additional Sorting and Filters	Mar 07, 2018 07:43		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 5
MHX-106	WBS 41: PHP Sorting and Filters [display the postings in Buy page in a business contexts...]	Mar 07, 2018 07:43		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 5
MHX-105	WBS 39: PHP Sorting and Filters [Click Columns Headers...]	Mar 08, 2018 09:11		Divyalakshmi	IN STAGING	Unresolved	Sprint 5
MHX-104	WBS 38: PHP Sorting and Filters [Columns spec]	Mar 07, 2018 07:38		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 4
MHX-102	WBS 37: Search Results - List view and easier navigation	Mar 07, 2018 07:49		Divyalakshmi	IN STAGING	Unresolved	Sprint 6
MHX-100	WBS 35: PHP Search Results [mouse cursor over...]	Mar 07, 2018 07:48		Senthil Vasan	IN STAGING	Unresolved	Sprint 6
MHX-99	WBS 34: PHP Search Results with additional information	Mar 07, 2018 07:47		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 6
MHX-98	WBS 33: PHP Search item [Quick search...]	Mar 07, 2018 07:47		Divyalakshmi	IN STAGING	Unresolved	Sprint 6
MHX-97	WBS 32: PHP Search Form Specification	Mar 07, 2018 07:47		Divyalakshmi	IN STAGING	Unresolved	Sprint 6

14 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	

QA	

Table of Contents

User Story

As a registered active user of MRX 3.0 website, I want a search bar and buy menu so that I can search, view and filter all the live posting in the marketplace.

End Objective:	To provide search functionality and section to view and filter all live postings
User/Actor:	Registered Primary and Secondary user of MRX 3.0
Program Type:	Web application
Trigger:	Buy tab on the left menu and the search bar will be found on all pages after successfully logged in.
Related User Story:	
Related WBS #:	32-35, 37-42, 47, 48

Related WBS description:

32	As a user, I want to use a simple form consisting of one field to enter the name of the item [string] and one button to submit my search phrase so that the application displays a filtered list of posted items matching the search phrase. A user can also enter NDC. As you type in the NDC, the name of the drug displays below the NDC. Member should also be able to scan into this field with a handheld scanner.
33	As a pharmacy, when typing my search phrase in the quick search form, I want the application to display the list of 10 items with names beginning with the string (sorting: alphabetical). The prompting should begin as I type the first letter. The list of the prompted items should be refreshed each time any character in the quick search form changes. The list items should be displayed as: [item name] [item strength]. For each prompted item: - the inputted search phrase should be visually distinguished in the item's name; - the item should act as a button resulting with changing the search phrase for the phrase equal to the list item display phrase. For no prompt results: a notification "No results!" should be displayed. Everything same as in 2.0
34	As a user, I want the application to display additional information (icons) on the item condition: - Package condition (1 of 5 options: D = Damaged / TPL = Torn Package Label / ONS = Original Non-Sealed / OS = Original Sealed / OT = Other); - Previously Purchased (Active = previously purchased / Inactive = not purchased before); - Free Ground Shipping (1 of 3 options: Inactive = No shipping offer available; $50 = Free Ground Shipping on orders of $50 or more; $250 = Free Ground Shipping on orders of $250 or more); - Add this item to your Wishlist (Active = item not in user's Wishlist [clickable - adds item to user's wishlist, no front-end feedback] / Inactive = item already in user's Wishlist); - G = Generic Equivalents [link to modal pop-up dialog "Item details", tab "Generic Equivalent"]; - Compare Prices (Active = there are postings to compare [link to modal pop-up dialog "Item details", tab "Compare Prices"] / Inactive = there are no postings to compare); - Refrigerated Item (Active = the item is refrigerated / Inactive = the item is non-refrigerated). This will same as "Buy" page in 2.0 but only for the drug that was searched.

35	As a user, I want the application to display additional helpful information if I place my mouse cursor over: - item photo thumbnail (enlarges the photo) - each of icons at "Item info" column; - partial packaging icon. Same as 2.0 current state
37	As a user I want the application to display (close to the list) set of tools allowing me to adjust the list view and easier navigation: - "number of items per page" drop-down menu (10/25/50/100/200 items per page); - navigation between pages of results; - results sum-up ("showing results X to YYY from ZZZ. Page A of B.").
38	As a user, I want the list to contain the columns: - "Name" (name [one of many]; photo thumbnail; NDC#; Labeler/Mfg); - "Item info / Seller rating" (set of icons [look: display Item info icons]; graphical representation of seller rating (0-5 stars, 0,5 star accuracy)); - "Strength / Packaging" (strength; packaging [+ icons]); - "Exp" (posting expires); - "% off WAC" (WAC discount); - "Price / Unit (ea)" (Total price; Unit price); - "Qty" (form field (drop-down), which allows to define the quantity to be purchased); - "" (add to cart icon). As a user, I want to be able to display legend for the "Item info" column by clicking a question mark icon in the column header. Filtering and sorting should work for all the items and not just for that page.
39	As a user, I want to be able to filter and sort the list of my posted items by clicking column headers (name, strength, packaging, exp, % off WAC, price, Unit (ea), qty). The user should have the ability to edit the price, qty, lot # and expiration date without opening the full edit form of the order.
40	As a user, I want to be able to export the list of my posted items into a CSV file by clicking a "XLS" icon.
41	As a user, I want to quickly display the postings in Buy page in a business contexts (predefined versions of the all postings list): - My previous purchases: -- Filtering: purchased by my pharmacy My previous purchases filter does not include "my postings". Only when viewing the total marketplace will "my postings" be displayed. These are identified with a blue add to cart button. -- Modifications: --- "Add to cart" button in different color for purchased postings; --- "Edit my posting" button instead of "Add to cart" button in list items posted by my pharmacy; --- information on last purchase date or last sale date in the list item; --- list items representing my postings highlighted in different color + marked with an MRX icon in column "Name". - Items in my wishlist: -- Filtering: items matching drugs in my wishlist; -- Modifications: --- same as for: My previous purchases;
42	As a pharmacy I want to be able to apply additional filters to: all items list / quick search results list / predefined item list. Filters: - Packaging (Any; Full; Partial); - Expiration Date (Any; > 1 month; > 3 months; > 6 months); - Minimum WAC Discount (Any; 25% or greater; 50% or greater; 75% or greater); - Brand & Generic (Any; Brands Only; Generic Only); - Posted Within (Any; 1 day; 3 days; 7 days). I want to be able to reset (remove) the additional filters.
47	As a pharmacy I want the "add to cart" button be displayed in 3 versions: - add to cart (for never before purchased items); - add to cart (for items my pharmacy has purchased before); - edit my posting (for my postings). I want the button to be displayed per each list item. I want a choice of the "reason for purchase" (obligatory): - Specific patient need; - Declared public health emergency; and a quick explanation of both.

48	As a pharmacy, after I added an item to my shopping cart, I want the application to filter the buy marketplace to items posted by the same seller only. The application should also provide a button to switch between full buy marketplace and filtered marketplace with items listed by sellers that the user have already added to the cart.

Business Rules

Buy Menu

The "Buy" menu will be on the left pane on all pages once logged in. "Buy" menu will contain the following three tabs.

- All postings
- Buy again
- My wishlist

When the user clicks on "Buy" menu, the default view will be "All postings" tab and it will contain the following fields. Most of the information will be provided when the item is posted. Refer US 8 - Post an item to know details about the data.

1. Product Name
2. NDC
3. Manufacturer
4. Expiry Date
5. Strength
6. Packaging (has an icon, if the item is partial pack)
7. Package Condition
8. WAC discount % (Calculated based on latest WAC price and not the WAC price when posting was created)
9. Per unit price
10. Price
11. Quantity available
12. Estimated delivery date (Fedex API - calculated based on seller's shipping ZIP code and buyer's shipping ZIP code, shipping method selected by the seller, shipping date will be + 2 business days of current date) (Question mark icon - Other conditions could impact the delivery date)

The following information will be represented as icons

Icon	Active	Inactive	Information
Generic Equivalence (Medi span)	If a generic equivalent NDC is available in the marketplace	If there is no generic equivalent NDC available in the marketplace.	Mouse over provides information. "Search for generic equivalent" (If active). "No generic equivalent available" (If inactive)
Price comparison	If there is at least one other posting of the same NDC	If there is no other posting of same NDC	Mouse over provides information. "Compare price against all sellers" (if active). "No other price available" (If inactive)
Refrigerated item (from Medispan)	If the NDC is a refrigerated or frozen item	If the NDC is not a refrigerated or frozen item	Mouse over provides information. "This is a refrigerated/frozen item" (If active). "This is not a refrigerated/frozen item" (If inactive)
Purchase history	If the NDC was previously ordered by the member (even if the order is canceled and even if it is more than 12 months ago)	If the NDC was never ordered	Mouse over provides information "Previously purchased by your pharmacy" (if active). "Never purchased by your pharmacy"(if inactive)
Shipping (Posting page)	If seller pays the shipping $50 - for items $50 or more $200- for order $200 or more	If buyer pays the shipping	Mouse over provides information. "Free shipping on items $50 or more" (If active and $50 option) "Free shipping on orders $200 or more" (If active and $200 option) "No free shipping options available" (if inactive)
Seller Rating		No Seller Rating	Mouse over provides information. "Based on last 30 completed sales"
Add to wishlist	NDC in wishlist	NDC not in wishlist	User can click to add and remove NDC from the wishlist

The user will be able to sort the products (all products and not just the products in the page) on the following parameters. The user should be able to sort both ascending and descending

Sort options	Ascending	Descending
Date Posted	Oldest to Newest	Newest to Oldest
Product Name	A Z	Z A
Expiry Date	Oldest to Newest	Newest to Oldest
Strength	Alpha first (A Z), then lowest to highest in numeric	highest to lowest in numeric first and then Alpha (Z A)
WAC discount %	Smallest to largest	Largest to smallest
Price per unit	Smallest to largest	Largest to smallest

Default sort - Latest updated/posted item will be at the top. When a NDC is posted with declining price, that posting has to be brought to the top of the marketplace every time the price is updated (considering it as an updated posting). When an NDC is searched, the default sort will be based on the price per unit (cheapest at the top)

The page should provide the following advanced filters (default value = any). The user should have the ability to reset all filters at once. The user should also be able to save a particular filter combination (only one) and subsequent saves will overwrite the previous filter combination saved.

Filter	Options
Packaging	Any / Full / Partial
Expiration Date	Any / > 1 month / > 3 months / > 6 months
Minimum WAC Discount	Any / 25% or greater / 50% or greater / 75% or greater
Brand & Generic	Any / Brands Only / Generic Only
Posted Within	Any / 1 Day / 3 Days / 7 Days
Package condition	Any / Sealed / Unsealed

The page will have two additional pre-defined filters as tab next to "all postings". It should be possible to use the above mentioned advanced filters on pre-defined filters list

Pre-defined filter	Rules	Notes
Buy again	Displays the items in marketplace that has the same NDC as previously purchased by the member (n ot user). This should includes NDCs which are found in open orders and cancelled orders.	Does not display items posted by the member.
My Wishlist	Displays the items in marketplace that has the same NDC as those found in the member's (not user) wishlist	Does not display items posted by the member.

The "add to cart" click-to-action (CTA) button will be of one of the three options

CTA	Trigger	Notes
My posting (Blue)	If the listing was posted by the same member	
Add to cart (Green)	If the NDC was previously purchased by the member in the last 12 months. If more than 12 months, display Orange "Add to cart"	Display information on last purchase date only if purchases in the last 12 months.
Add to cart (Orange)	All other scenarios other than above two	

The user will be provided an option to export the filtered results in CSV format. (format file: Marketplace Export.xlsx)

The page should have pagination at the bottom of the page

- "number of items per page" drop-down menu (10/25/50/100/200 items per page) - Default value 100
- navigation between pages of results;
- Results sum-up ("showing results X to YYY from ZZZ. Page A of B.").

When there is no item to display on the buy page or product details page due to factors such as too many filters, the system should display the message "No items displayed".

Search

The search bar should be available on all pages if the user is logged in. This search bar will only search for items in "Buy" menu.

A user may enter the search phrase (name of the item), NDC number or scan the bar-code/QR code using a handheld scanner. To use handheld scanner for search, the user has to activate the search by clicking on the search field. The system should search as soon as the scanner recognizes a bar-code/QR code. If the user types in the search field, the user should be able to submit the search phrase by either typing enter key or tab key on the keyboard or by clicking the magnifying glass icon on the screen.

When the user types the search phrase,the system display the list of 10 items with names beginning with the string (sorting: alphabetical).
The prompting should begin immediately after the first letter is typed. The list of the prompted items should be refreshed each time any character in typed.
The list items should be displayed as: [item name] [item strength].
When the user clicks on a result, the system should start the search.
For no prompt results: a notification "No available posting!" should be displayed.

As the user types NDC, the name of the drug should display below the search bar.

The system should redirect the user to the "Buy" Menu page displaying a filtered list of posted items matching the search phrase. The default sort will be based on the price per unit (cheapest at the top).

Product visibility

Pharmacy state restriction:

Based on the pharmacy state of the user, the buy marketplace should be filtered to show the postings that correspond to the below grid. This business rule will be always be applicable. The back office user should be able to add new states and edit the settings of existing states.

Pharmacy State	Buy Sealed from Same state pharmacy	Sell Sealed to same state ph armacy	Buy Sealed from other state pharmacies	Sell Sealed to other state pharmacies	Buy Non sealed from same state pharmacy	Sell Non sealed to same state pharmacy	Buy Non sealed from other state pharmacies	Sell Non sealed to other state pharmacies
Arizona	Yes	Yes	No	Yes	Yes	Yes	No	Yes
California	Yes	Yes	No	Yes	Yes	Yes	No	Yes
All other states	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Seller filter:

Once the user adds a product to the cart, the buy marketplace has to be filtered to show only the products sold by that seller. The added item should be highlighted in the Buy page (refer MRX 2.0 in which the item is highlighted as yellow). If more qty is available, user should be able to add. If more qty is not available, add to cart button should be disabled.

The user should have a tab (Marketplace) to select and view the marketplace of products from sellers other than Seller A. Similarly, the user should have a tab (seller A) to select and view Seller A's product only. The Seller tab should indicate the total quantity of items in the cart from this seller. The user should be able to select both tabs (Marketplace and Seller A) to view the entire marketplace.

When the user adds another product to the cart from seller B, the buy marketplace has to be filtered to show only the products sold by the seller B. A new tab (seller B) should be added which will help the user select and view Seller B items only. Maximum of 5 sellers can be allowed per shopping cart. At any time, the user should be able to select one or more than one tabs. In the cart, if the buyer removes all the items from a particular seller, then that seller's tab should be removed from the page.

These tabs will be active until the item cart is empty (either by deleting the items in the cart or by placing an order with the items in the cart).

WAC discount less than 10%:

When the WAC discount based on the current WAC price is less than 10%, the system has to hide those postings from the buy marketplace.
When AAWP price is used for posting, the system has to hide postings with WAC discount less than 25% from the buy marketplace.

Acceptance Criteria:

1. The predefined filters are working as described.
2. The buy page has the fields and icons mentioned.
3. The buy page provides the ability to sort and do advanced filtering.
4. The buy page has three variants of add to cart button.
5. The user is able to search with a phrase.
6. The user is able to search with NDC.
7. The user is able to search by scanning the bar-code.
8. The user is able to search by scanning the QR code.
9. The marketplace is correctly filtered based on Pharmacy state restriction
10. The marketplace is correctly filtered to show only seller's items after adding to cart.
11. The user is able to switch to full marketplace when viewing a specific seller's marketplace.

Screen Prototype

1. Buy Menu

MRX-buy-menu-filter.pdf

US 18 - BO Manage Pharmacy Group

WBS #	<table><tr><th>Key</th><th>Summary</th><th>Updated</th><th>Due</th><th>Assignee</th><th>Status</th><th>Sprint</th></tr><tr><td>MHX-1333</td><td>SF - UAT Bugs - Aug 2</td><td>Aug 07, 2018 07:24</td><td></td><td>Ramprakash</td><td>RESOLVED</td><td></td></tr><tr><td>MHX-1199</td><td>SF - UAT 2 - Round 3 - 22 Apr</td><td>Sep 23, 2018 18:10</td><td></td><td>Senthil Vasan</td><td>RESOLVED</td><td></td></tr><tr><td>MHX-45</td><td>WBS 178: BO - Manage pharmacies' groups</td><td>Mar 07, 2018 07:40</td><td></td><td>Swapna.Patnaikuni</td><td>IN STAGING</td><td>Sprint 4</td></tr></table>3 issues
Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a back office user of MatchRx, I want pharmacy groups to manage parameters like selling fees and the ability to view, add, edit and delete groups so that I can customize the parameters to a specific group of pharmacies.

End Objective:	To provide a system for the back office users to group pharmacies and customize certain parameters.

User/Actor:	Back office users of MatchRX
Application:	Sales Force
Trigger:	
Related User Story:	US 13 - BO Member Search

Related WBS Description:

178	As BO User, I want to add members to groups which are defined (meta described) by: - Name (string); - Buying fee (money); - Buying fee period (days) (integer); - Buying order min (money); - Buying max escrow (money); - Selling fee (decimal (percent)); - Selling fee less than 25 items (decimal (percent)); - Selling fee less than 25 items registration date (date). I want to create, edit and delete these groups. I want to export list of groups to XLS/CSV file and to print the list. I want the meta description to be used as parameters in the business rules engine. (e.g. seller fee, escrow limit) All new members are added to the default group. There will be around 10 different groups and the BO user will have to manually change the groups for the member. The above groups doesn't apply for VM seller. The pharmacy will be part of the same group for both the 3.0 and VM buyer.

Business Rules

BR_Financial Group

A financial group will have the following parameters:

1. Group Name
2. Buying order min (money)
3. Buying max escrow (money) - The max escrow is shared between both the VM and MRX 3.0, and only applies to ACH transactions. Credit card transactions on the VM buyer application will not be applied against the escrow.
4. Selling fee if # of items posted in the lifetime are between 0 - 24(decimal (percent))
5. Selling fee if # of items posted in the lifetime are more than or equal to 25 (decimal (percent));
6. Selling fee when 50 or more open postings (including the sold item) at the time of sale

The value set for the above parameters in a particular financial group will be applicable for all the pharmacies in that group.

A particular pharmacy will belong to one and only one group. By default, a newly registered pharmacy will be assigned to "Default" group. A back office user should be able to change the group for a particular pharmacy or group of pharmacies. There will be not automated business rule to reassign the groups for the pharmacies. The pharmacy will be part of the same group for both the 3.0 and VM buyer platform. The user should be able to create, clone, edit and delete these groups.

When clicked on the name of a particular group, the list of pharmacies belonging to group should be displayed in the member page as described in "US 13 - BO Member Search"

Parameter/Group Name	Default	High roller 30K	High roller 40K	Z Group	No Buy	No Sell	Probation
MRX 3.0 Buying order min (money);	$15	$15	$15	$15	$0	$15	$15
Buying max escrow (money);	$20,000	$30,000	$40,000	$100,000	$0	$20,000	$500
Selling fee if # of items posted in the lifetime are between 0 - 24(decimal (percent))	12 %	12 %	12 %	12 %	12 %	0%	12%
Selling fee if # of items posted in the lifetime are more than or equal to 25 (decimal (percent));	9.5 %	9.5 %	9.5 %	9.5 %	9.5 %	0%	9.5%
Selling fee when 50 or more open postings (including the sold item) at the time of sale	7.5%	7.5%	7.5%	7.5%	7.5%	0%	7.5%

BR_No Buy

All members assigned to this group should not have access to "Buy" tab.

BR_No Sell

All members assigned to this group should not have access to "Sell" tab.

When a member with open postings is assigned to No sell group, the postings should be hidden from the marketplace.

When a member with open seller orders is assigned to No sell group , All orders after seller confirmation should be allowed to complete and other orders should be cancelled.

Back Office User Access Rules

Page Visibility and features/User Role	Admin	Accountant	IT	CSR Lead	CSR Team	Sales Manager	Sales Team	Compliance Manager	Marketing	Member Trainer	Utilization Manager	Wholesaler Manager
Pharmacy Group Page	RE	R	R	R	R	R	R	R	R	R	R	R
Ability to view pharmacies belonging to group	RE	R	R	R	R	R	R	R	R	R	R	R
Create New Group	E	N	N	N	N	N	N	N	N	N	N	N
Clone a Group	E	N	N	N	N	N	N	N	N	N	N	N
Edit a Group	E	N	N	N	N	N	N	N	N	N	N	N
Delete a Group (cannot delete unless the number of members is zero)	E	N	N	N	N	N	N	N	N	N	N	N

Fields/User Role	Admin	Accountant	IT	CSR Lead	CSR Team	Sales Manager	Sales Team	Compliance Manager	Marketing	Member Trainer	Utilization Manager	Wholesaler Manager
Group Name	RE	RE	R	R	R	R	R	R	R	R	R	R
MRX 3.0 Buying order min (money);	RE	RE	R	R	R	R	R	R	R	R	R	R
Buying max escrow (money);	RE	RE	R	R	R	R	R	R	R	R	R	R
Selling fee if # of items posted in the lifetime are between 0 - 24(decimal (percent))	RE	RE	R	R	R	R	R	R	R	R	R	R
Selling fee if # of items posted in the lifetime are more than or equal to 25 (decimal (percent));	RE	RE	R	R	R	R	R	R	R	R	R	R
Selling fee when 50 or more open postings (including the sold item) at the time of sale	RE	RE	R	R	R	R	R	R	R	R	R	R

R - Read   E - Edit   None - Not visible

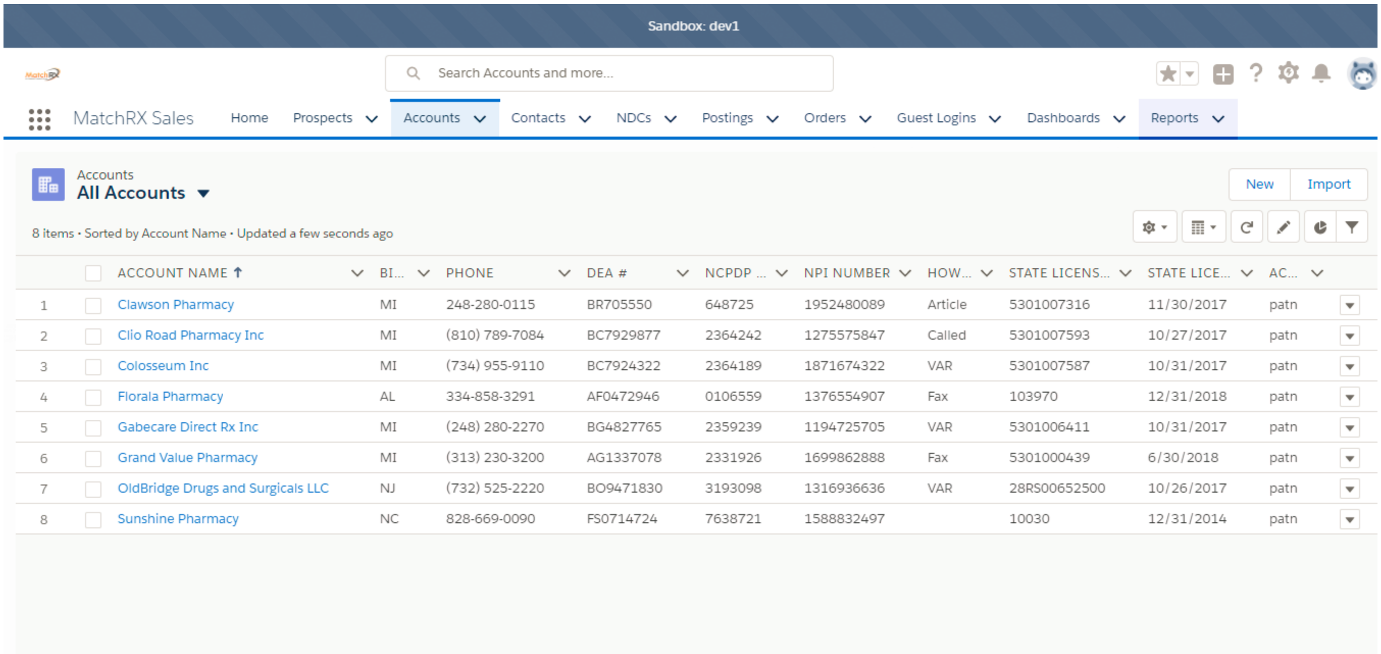
Acceptance Criteria

Pharmacy Group page

1. has the correct columns
2. Read access is correctly defined
3. Edit access is correctly defined
4. Able to move a pharmacy from one group to another
5. Able to reassign multiple pharmacy to a different group at once
6. Able to create a new group
7. Able to clone a group parameters
8. Able to edit group's paramaters
9. Able to delete a group
10. Not able to delete a group when the group has pharmacies assigned to that group
11. A newly created pharmacy is assigned correctly to default group

Screen Prototype

It will be a standard Sales force screen similar to the below attached page



US 19 - MRX 3.0 Product Details

WBS #

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-544	CLONE - WBS 43: PHP Item Details	Mar 19, 2018 09:08		Divyalakshmi	IN QA	Unresolved	Sprint 7
MHX-101	WBS 36: PHP Search Results - Product page	Feb 26, 2018 06:17		Divyalakshmi	IN QA	Unresolved	Sprint 7
MHX-39	WBS 43: PHP Item Details - Product page	Mar 09, 2018 07:24		rajasekar.jeyakumar@htcindia.com	IN STAGING	Unresolved	Sprint 6

3 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered active user of MRX 3.0 website, I want a product details page so that I can know detailed information of the product.

End Objective:	A page providing detailed description of the product
User/Actor:	Registered Primary and Secondary user of MRX 3.0
Program Type:	Web application
Trigger:	When clicked on a product image/drug name in the "Buy" tab.
Related User Story:	US 17 - MRX 3.0 Buy Menu
Related WBS #:	36, 43

Related WBS description:

36	As a user, when searching for items, I want the application to allow me to navigate between detailed information on the posted item and related postings: - - photo gallery of actual item for sale - item details (drug details); - item details (posted subject details); - item ingredients; - item generic equivalents; - other postings of that item (compare prices); - other items of the same seller; - list of my purchases of the same item (drug). This is same as product page during the Buying process
43	As a pharmacy I want the application to display additional information (icons) on the item condition: - Package condition (1 of 5 options: D = Damaged / TPL = Torn Package Label / ONS = Original Non-Sealed / OS = Original Sealed / OT = Other); - Previously Purchased (Active = previously purchased / Inactive = not purchased before); - Free Ground Shipping (1 of 3 options: Inactive = No shipping offer available; $50 = Free Ground Shipping on orders items of $50 or more; $250 200 = Free Ground Shipping on orders of $250 200 or more); - Add this item to your Wishlist (Active = item not in user's Wishlist [clickable - adds item to user's wishlist, no front-end feedback] / Inactive = item already in user's Wishlist); - G = Generic Equivalents [link to modal pop-up dialog "Item details", tab "Generic Equivalent"]; - Compare Prices (Active = there are postings to compare [link to modal pop-up dialog "Item details", tab "Compare Prices"] / Inactive = there are no postings to compare); - Refrigerated Item (Active = the item is refrigerated / Inactive = the item is non-refrigerated).

Business Rules

When a user clicks on the product image or the drug name on the "Buy" page, the system should popup a frame with the following tabs. After pop up, if the user types the "Esc" key or clicks outside the frame or the "X" on the right top of the frame, the user should be back on the "Buy" page.

Refer US 17 - MRX 3.0 Buy Menu to get details about the various fields mentioned below.

If the user has added an item to the cart, the items found under seller tabs (Refer US 17 - MRX 3.0 Buy Menu - Seller Filter) will have only item details and Purchase history tabs in the pop-up. The marketplace tab or if cart is empty, the pop up will have all five tabs (Item details, Generic Equivalent, Compare price, seller's other items, purchase history).

The tabs Generic Equivalent, Compare price, seller's other items will have the following fields:

1. Drug Name
2. NDC
3. Photos (Medi-span image as default). Photo gallery at the bottom to let user choose the photos.
4. Strength - Single / Multi (when Multi provide a question mark - rollover on the multi should display all the ingredients e.g check NDC 68001013100 in MRX 2.0)
5. Labeler/Mfg
6. Packaging
7. Package Condition
8. Package Quantity
9. Expiration Date
10. Unit Price
11. WAC Discount

12. AAWP Discount
13. Seller Notes
14. Ship Promo
15. Package Price
16. Quantity Available as user entry field
17. Add to cart (Three colors possible with date, if applicable. Change Blue to grey and do not allow the user to edit the posting)

These three tabs will be sorted by the lowest price per unit. The user will not have the pre-defined filter such as "Items in my wishlist" and "My previous purchases" available. The rules mentioned in US 17 - MRX 3.0 Buy Menu - Pharmacy state restriction applies to these list. These pages should have unlimited scrolling. If there is no posting in the marketplace to be shown in these tab, these tab should be disabled and greyed out (but should be visible).

Item Details

This will be the default tab when the user clicks on the product image or drug name. This tab will have the following fields.

1. Drug Name
2. NDC
3. Photos (Medi-span image as default). Photo gallery at the bottom to let user choose the photos.
4. Generic Name
5. Strength - Single / Multi (when Multi - display all the ingredients e.g check NDC 68001013100 in MRX 2.0)
6. Form
7. Storage
8. Labeler/Mfg
9. Shape
10. Lot Number
11. Packaging
12. Package Condition
13. Package Quantity
14. Expiration Date
15. Unit Price
16. WAC Discount
17. AAWP Discount
18. Shipping Method
19. Seller Notes
20. Est. Delivery date
21. Ship Promo
22. Package Price
23. Quantity Available as user entry field
24. Add to wishlist
25. Add to cart (Three colors possible with date, if applicable)

Generic Equivalent

This tab will list all the live posting in the marketplace which have the same generic drug (which can be found in Medi-span table). The list should also include the current NDC that is being viewed.

Compare Prices

This tab will list all the live postings in the marketplace which have the same NDC.

Seller's Other Items

This tab will list all the live posting in the marketplace posted by the same seller.

Prior Orders

This tab should display the purchase order history of the selected NDC. The order details will have the following fields

1. Order ID
2. Order Date
3. Packaging
4. Quantity (of that NDC) (it will be 1 if the packaging is partial)
5. Price per unit (of that NDC)
6. Status

This tab should not include orders with the status "Cancelled". The list should be sorted by order date (newest first). This page should have unlimited scrolling. If the order has multiple items in the order, the quantity, price per qty and Total $ value fields should mention the values that correspond to that particular NDC only and not the entire order.

If there is no order to be shown in this tab, this tab should be disabled and greyed out (but should be visible).

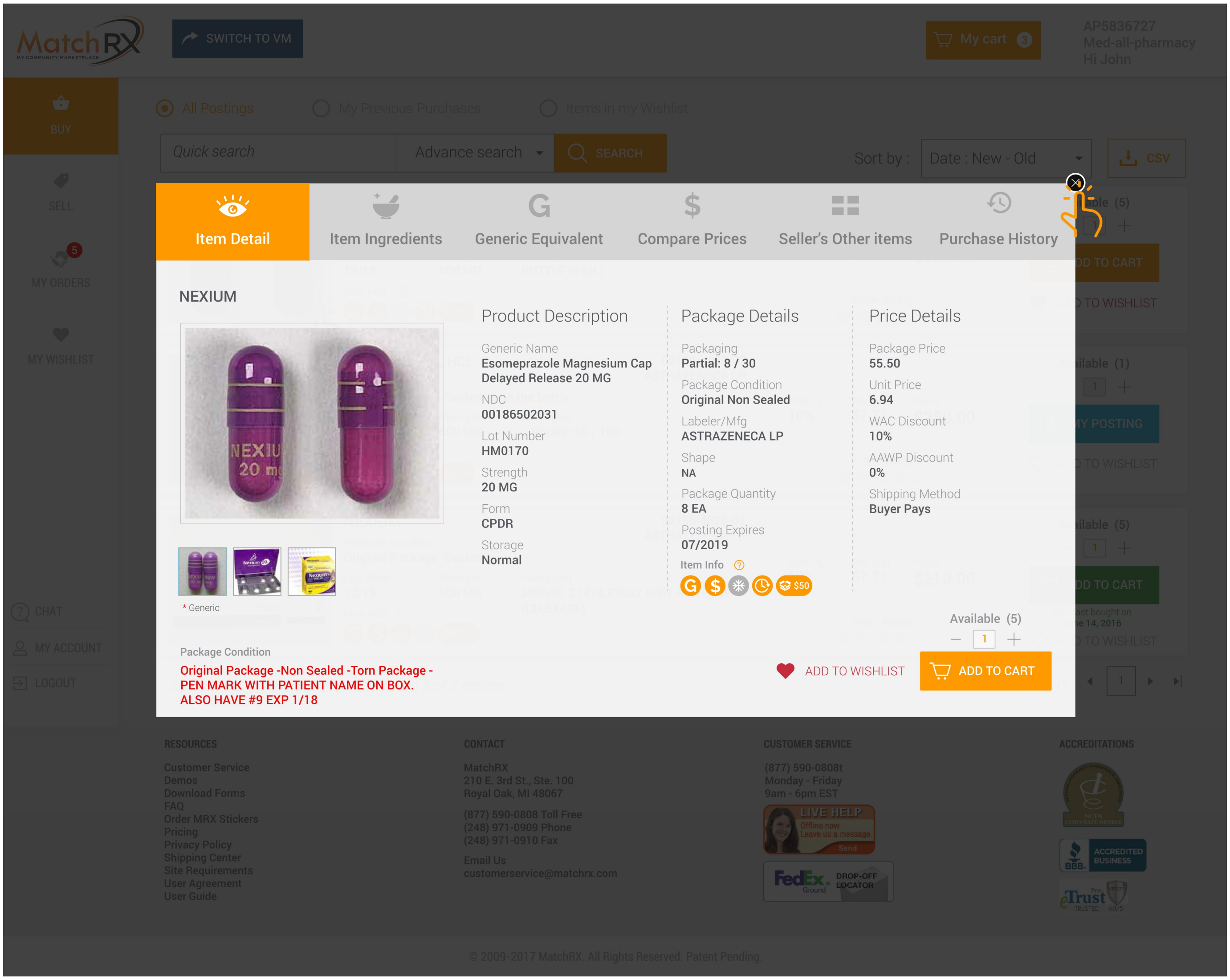
The below table explains the default tab to be opened when user clicks on an icon on "Buy" page

Icon clicked	Default tab to open on product details
Generic Equivalence	Generic Equivalent
Price comparison	Compare Prices
Refrigerated item	No action
Purchase History	Prior Order
Shipping	Item details
Seller Rating	No action

Acceptance Criteria:

1. All tabs should be displayed
2. Fields under each tab is correctly populated.
3. Tabs are disabled correctly when there is not item to display.
4. Clicking on the icon in Buy page redirects to the correct tab.
5. Strength rollover displays correctly.
6. Add to wishlist populates correctly when selected.

Screen Prototype



US 20 - BO Restricted NDCs

Key	Summary	Updated	Due	Assignee	Status	Sprint
MHX-122	WBS 183: BO - Review Restricted NDC details	Mar 07, 2018 07:40		Swapna.Patnaikuni	IN STAGING	Sprint 4
MHX-121	WBS 182: BO - Review List of restricted NDCs from MRX	Mar 07, 2018 07:41		Swapna.Patnaikuni	IN STAGING	Sprint 4

2 issues

WBS #	(see issues above)
Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	

QA	

Table of Contents

User Story

As a back office user of MatchRx, I want the ability to view, add, delete and edit the NDCs that are considered completely restricted or restricted to full pack by MatchRX so that I can manage a list of NDCs that should not be allowed to be posted in MatchRX website.

End Objective:	To provide a system for the back office users to restrict certain NDCs or restrict the partial posting of certain NDC to be posted in MatchRX website
User/Actor:	Back office users of MatchRX
Application:	Salesforce
Trigger:	
Related User Story:	

Related WBS Description:

182	Display all NDCs which are resrticted for posting from MRX. NDC, date added, options to delete or add new restriction. All postings related to MRX 3.0 need to be validated against this list. This is a summary view. This is a predefined list created and maintained by MRX admin.

183	This is the detailed view of the above.
	As BO user I want to see restricted NDC details :
	- Name
	- Generic name;
	- Strength;
	- Form;
	- NDC#;
	-- Date created;
	-- Date modified;
	-- Comments
	- search the list by NDC#;
	- mange view of the list (number of records per page, sorting, navigation);
	- export the list to Excel file;
	- print the list;
	- add new records of restricted NDCs;
	  -The NDC and drug name are required.
	  -Notes field is an open text field
	- delete existing records of restricted NDCs.
	
	The above fields are retrieved from Medi-Span when a NDC # is typed.

Business Rule

The completely restricted NDCs & restricted to full pack NDC should be maintained as two separate list and should be shown as pre-defined filters in Salesforce.

BR_Restricted NDCs Basic Search

The Back office user should be able to search for completely restricted NDCs & restricted to full pack NDC using the Global search

BR_Restricted NDCs Page

The default view should display a grid with the following columns and the ability to sort

1. NDC #
2. Drug Name
3. Generic Name
4. Strength
5. Form
6. Ingredients
7. Comments (250 character limit)
8. Date Added
9. Date Modified
10. Last modified by (BO user name)

BR_Add new drug

The user should be able to add new drugs to the lists and edit/delete existing drugs.

To add a new drug, user should be able to search the drugs using NDC or drug name but not both at the same time. When the user enters the NDC or drug name, salesforce should display all the drugs which match the NDC or drug name from Medi-span file saved in MatchRx database (same file used during US 8 - MRX 3.0 & Mobile - Post an item). The user should be able to select multiple drugs at the same time and add it to restricted list.

Date added, date modified and last modified by should be system generated. Comments will be entered by the user. Rest of the fields are prepopulated (if available) from Medi-span file saved in MatchRx database (same file used during US 8 - MRX 3.0 & Mobile - Post an item).

BR_Restricted NDC Details Page

When the user clicks on the NDC#, the user should be redirected to details page which will have the following fields

1. NDC #
2. Drug Name
3. Generic Name
4. Strength
5. Form
6. Ingredients
7. Comments
8. Date Added
9. Date Modified
10. Last modified by (BO user name)

Back Office User Access Rules

Page Visibility/User Role	Admin	Accountant	IT	CSR Lead	CSR Team	Sales Manager	Sales Team	Compliance Manager	Marketing	Member Trainer	Utilization Manager	Wholesaler Manager
Restricted NDCs Page	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes
Add new drug	Yes	No	No	No	No	No	No	No	No	No	No	No

Restricted NDC Details Page Fiel ds/User Role	Admin	Accountant	IT	CSR Lead	CSR Team	Sales Manager	Sales Team	Compliance Manager	Marketing	Member Trainer	Utilization Manager	Wholesaler Manager
NDC #	R	R	R	R	R	R	R	R	None	R	R	R
Drug Name	R	R	R	R	R	R	R	R	None	R	R	R
Generic name	R	R	R	R	R	R	R	R	None	R	R	R
Strength	R	R	R	R	R	R	R	R	None	R	R	R
Form	R	R	R	R	R	R	R	R	None	R	R	R
Ingredients	R	R	R	R	R	R	R	R	None	R	R	R

Date added	R	R	R	R	R	R	R	R	None	R	R	R
Date modified	R	R	R	R	R	R	R	R	None	R	R	R
Comments	RE	R	R	R	R	R	R	R	None	R	R	R
Last modified by (BO user name)	R	R	R	R	R	R	R	R	None	R	R	R
Update button	RE	R	R	R	R	R	R	R	None	R	R	R
Delete button	RE	R	R	R	R	R	R	R	None	R	R	R

R - Read E - Edit None - Not visible

Acceptance Criteria

Restricted NDC page

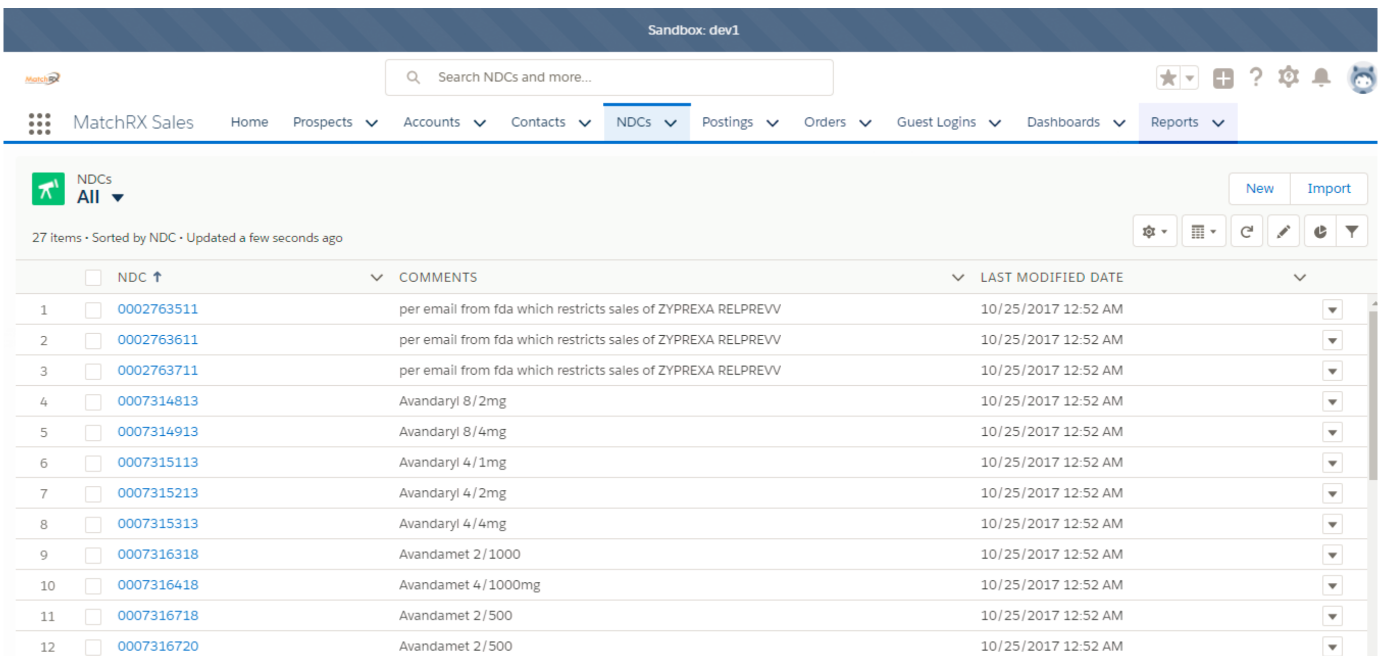
1. has the correct default columns
2. user role marketing is not able to view this page
3. Only user role admin has access to adding a new drug
4. User is able to add a drug using NDC
5. User is able to add a drug using drug name

Restricted NDC Details page

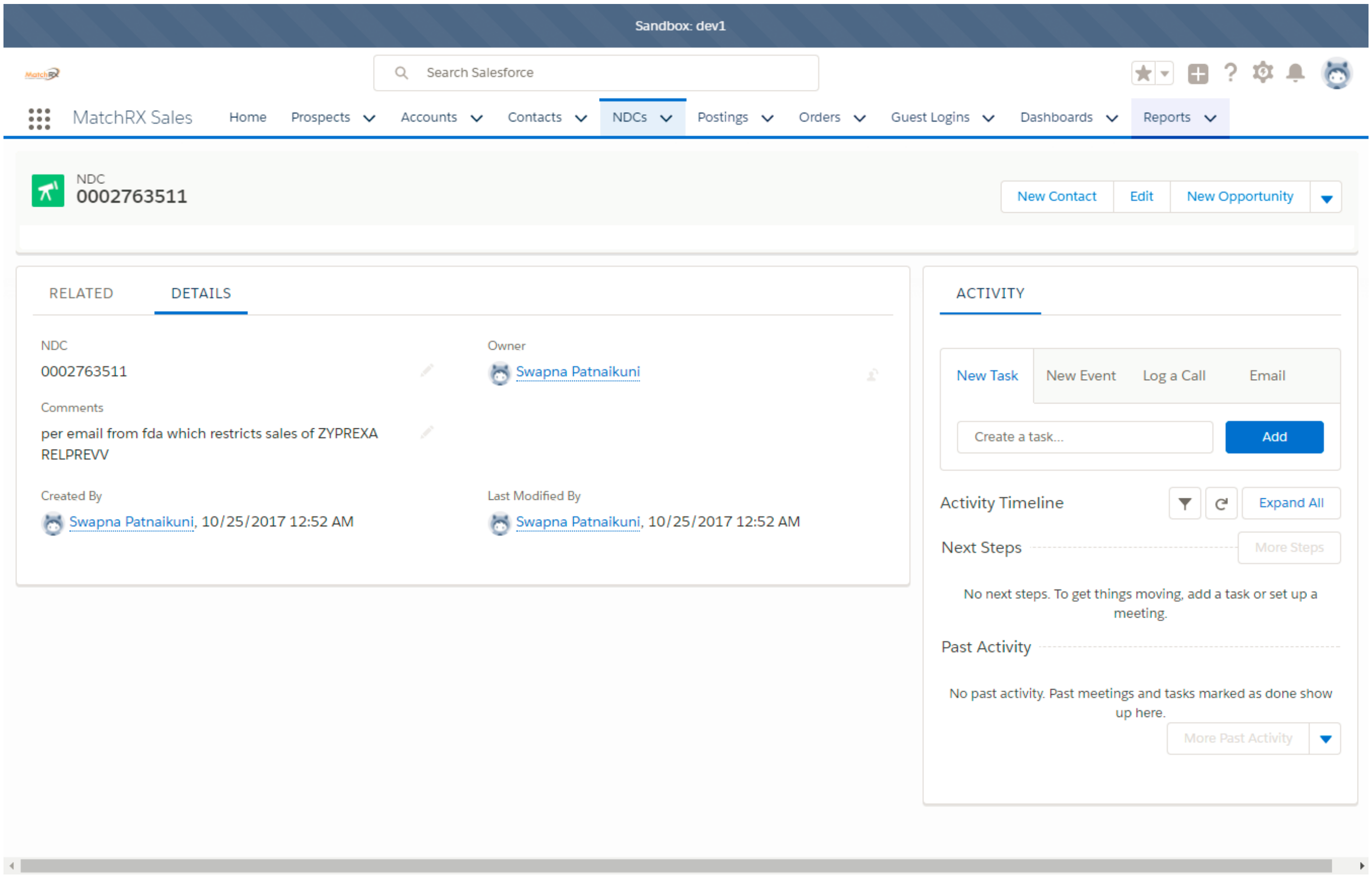
1. has the correct fields
2. Only user role admin has access to editing/deleting a drug

Screen Prototype

1. Restricted NDCs Page



2. Restriced NDC Details Page



US 21 - Mobile Buy Menu

WBS #	
	(issues table below)

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-255	WBS 142: Mobile Search and Filter: Additional Filters	Apr 17, 2018 07:01		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 8
MHX-254	WBS 141: Mobile Search & Filter - display the postings in a business contexts	Apr 17, 2018 07:01		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 8
MHX-253	WBS 140: Mobile Search and Sort filters	Apr 17, 2018 07:02		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 8
MHX-252	WBS 139: Mobile Search & Filter - Result list spec	Mar 26, 2018 10:29		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 7
MHX-251	WBS 138: Mobile Search Item	Mar 21, 2018 08:54		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 7
MHX-139	WBS 147: Mobile Order[Display item from Same seller]	Mar 07, 2018 07:49		Maguesh Balakrishnan	IN STAGING	Unresolved	Sprint 6
MHX-138	WBS 146: Mobile Order[Display Add to cart in 3 versions]	Mar 07, 2018 07:49		Maguesh Balakrishnan	IN STAGING	Unresolved	Sprint 6

7 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered active user of MRX 3.0 mobile app, I want a search bar and buy menu so that I can search, view and filter all the live posting in the marketplace.

End Objective:	To provide search functionality and a section to view and filter all live postings
User/Actor:	Registered Primary and Secondary user of MRX 3.0
Program Type:	Mobile application

Trigger:	Buy tab on the hamburger menu and the search bar will be found on all pages after successful log in.
Related User Story:	US 17 - MRX 3.0 Buy Menu
Related WBS #:	138 - 142, 146, 147

Related WBS description:

138	As a user, I want to use a simple form consisting of one field to enter the name of the item [string] and one button to submit my search phrase so that the application displays a filtered list of posted items matching the search phrase. A user can also enter NDC. This search field should be available on all pages on the mobile app.
139	As a user, I want the search result list to contain the columns: - "Name" (name [one of many]; photo; NDC#; Labeler/Mfg); - "Item info / Seller rating" (set of icons [look: display Item info icons]; graphical representation of seller rating (0-5 stars, 0,5 star accuracy)); - "Strength / Packaging" (strength; packaging [+ icons]); - "Exp" (posting expires); - "% off WAC" (WAC discount); - "Price / Unit (ea)" (Total price; Unit price); - "Qty" (form field (drop-down), which allows to define the quantity to be purchased); - "" (add to cart icon). As a pharmacy I want to be able to display legend for the "Item info" column by clicking a question mark icon in the column header.
140	As a user, I want to be able to sort the list items (name, strength, packaging, exp, % off WAC, price, Unit (ea), qty).
141	As a user, I want to quickly display the postings in a business contexts (predefined versions of the all postings list): - My previous purchases: -- Filtering: purchased by my pharmacy and posted by my pharmacy; -- Modifications: --- "Add to cart" button in different color for purchased postings; --- "Edit my posting" button instead of "Add to cart" button in list items posted by my pharmacy; --- information on last purchase date or last sale date in the list item; --- list items representing my postings highlighted in different color + marked with an MRX icon in column "Name". - Items in my whishlist: -- Filtering: items matching drugs in my whishlist; -- Modifications: --- same as for: My previous purchases; All the above will be under "Refine" option
142	As a user, I want to be able to apply additional filters to: all items list / quick search results list / predefined item list. Filters: - Packaging (Any; Full; Partial); - Expiration Date (Any; > 1 month; > 3 months; > 6 months); - Minimum WAC Discount (Any; 25% or greater; 50% or greater; 75% or greater); - Brand & Generic (Any; Brands Only; Generic Only); - Posted Within (Any; 1 day; 3 days; 7 days). I want to be able to reset (remove) the additional filters. All the above will be under "Refine" option
146	As a user I want the "add to cart" button be displayed in 3 versions: - add to cart (for never before purchased items); - add to cart (for items my pharmacy has purchased before); - edit my posting (for my postings). I want the button to be displayed per each list item. I want a choice of the "reason for purchase" (obligatory): - Specific patient need; - Declared public health emergency; and a quick explanation of both.
147	As a pharmacy, after I added an item to my shopping cart, I want the application to filter the buy marketplace to items posted by the same seller only. The application should also provide a button to switch between full buy marketplace and filtered marketplace with items listed by sellers that the user have already added to the cart.

Business Rules

Buy Menu

The "Buy" menu will be on the hamburger menu once logged in. "Buy" menu will contain the following three tabs.

- All postings
- My previous purchases
- Items in my wishlist

When the user clicks on "Buy" menu, the default view will be "All postings" tab and it will contain the following fields. Most of the information will be provided when the item is posted. Refer US 8 - MRX 3.0 & Mobile - Post an item to know details about the data.

1. Product Name
2. NDC
3. Manufacturer
4. Expiry Date
5. Strength
6. Packaging
7. WAC discount % (Calculated based on the current WAC and not the WAC price when the item was posted)
8. Price
9. Estimated delivery date (Fedex API - calculated based on seller's ZIP code and buyer's ZIP code, shipping method selected by the seller, shipping date will be +2 business days of current date)
10. Wishlist (display heart if item has been wishlisted previously. Not displayed if it is "your posting")
11. Seller Rating (Not displayed if it is "your posting")
12. Quantity (Displayed only if it is "your posting")

This page will not have "quantity selection" and "add to cart" button.

The following information will be represented as icons

Icon	Active	Inactive
Ship Promo	Displayed only if the seller pays the shipping $50 - for items $50 or more $200- for order $200 or more	If buyer pays the shipping

The following information should be displayed as label

Label	Trigger	Notes
Blue	If the listing was posted by the same member	The content should have "Your posting" and "Modified on MM-DD-YYYY". These postings should have a edit pencil icon. If the user clicks on the pencil icon, the app should display the edit posting page. If the user clicks on the posting (anywhere other than pencil icon), the app should display the item details page with "My postings" instead of "Add to cart"
Green	If the NDC was previously purchased by the member in the last 12 months. If more than 12 months, do not display green label	Display information on last purchase date only if purchased in the last 12 months. If the user clicks on the posting, the app should display the item details page.
No label	All other listings should not have any label	If the user clicks on the posting, the app should display the item details page.

The user will be able to sort the products (all products and not just the products in the page) on the following parameters. The user should be able to sort both ascending and descending

Sort options	Ascending	Descending
Date Posted	Oldest to Newest	Newest to Oldest
Product Name	A Z	Z A
Expiry Date	Oldest to Newest	Newest to Oldest
Strength	Alpha first (A Z), then lowest to highest in numeric	highest to lowest in numeric first and then Alpha (Z A)
WAC discount %	Smallest to largest	Largest to smallest
Price per unit	Smallest to largest	Largest to smallest

Default sort - Latest updated/posted item will be at the top. When a NDC is posted with declining price, that posting has to be brought to the top of the marketplace every time the price is updated (considering it as an updated posting). When an NDC is searched, the default sort will be based on the price per unit (cheapest at the top)

The page should provide the following advanced filters (default value = any). The user should have the ability to reset all filters at once. The page should display number of active filters.

Filter	Options
Packaging	Any / Full / Partial
Expiration Date	Any / > 1 month / > 3 months / > 6 months
Minimum WAC Discount	Any / 25% or greater / 50% or greater / 75% or greater
Brand & Generic	Any / Brands Only / Generic Only
Posted Within	Any / 1 day / 3 days / 7 days
Package condition	Any / Sealed / Unsealed

The page will have two additional pre-defined filters as tab next to "all postings". It should be possible to use the above mentioned advanced filters on pre-defined filters list

Pre-defined filter	Rules	Notes
Buy again	Displays the items in marketplace that has the same NDC as previously purchased by the member (not user). This should includes NDCs which are found in open orders and cancelled orders. Special filter of this tab - based on the purchase date (Any / 1 year / 2 year / 3 year)	Does not display items posted by the member.
My Wishlist	Displays the items in marketplace that has the same NDC as those found in the member's (not user) wishlist	Does not display items posted by the member.

The page should have unlimited scroll and a while scrolling a small button to return to the top. When there is no item to display on the buy page or product details page due to factors such as too many filters, the app should display the message "No items displayed".

Search

The search bar should be available on all pages if the user is logged in. This search bar will only search for items in "Buy" menu.

The user should be able to search by scanning the bar code/QR code using the mobile phone camera.

A user may enter the search phrase (name of the item), NDC number or scan the bar-code/QR code using the mobile phone camera. To use mobile camera for search, the user has to activate the search by clicking on the search field. The system should search as soon as the mobile camera recognizes a bar-code/QR code. If the user types in the search field, the user should be able to submit the search phrase by either typing enter key or tab key on the keyboard or by clicking the magnifying glass icon on the screen.

Product visibility

Pharmacy state restriction:

US 17 - MRX 3.0 Buy Menu - Product Visibility - Pharmacy state restriction

Seller filter:

Once the user adds a product to the cart, the buy marketplace has to be filtered to show only the products sold by that seller. The added item should be highlighted in the Buy page (refer MRX 2.0 in which the item is highlighted as yellow). If more qty is available, user should be able to add. If more qty is not available, add to cart button should be disabled.

The user should have a tab (Marketplace) to select and view the marketplace of products from sellers other than Seller A. Similarly, the user should have a tab (seller A) to select and view Seller A's product only. The user should be able to select both tabs (Marketplace and Seller A) to view the entire marketplace.

When the user adds another product to the cart from seller B, the buy marketplace has to be filtered to show only the products sold by the seller B. A new tab (seller B) should replace the Seller A tab. This Seller B tab will help the user select and view Seller B items only. Maximum of 5 sellers can be allowed per shopping cart.

These tabs will be active until the item cart is empty (either by deleting the items in the cart or by placing an order with the items in the cart).

If the user wants to view a specific seller's marketplace, the user should have the option to click on the "view seller's other items" on the checkout page which will redirect the user to buy page with two tabs, "Marketplace" and "Seller's tab" to view that specific seller's items. On the checkout page, each seller will have a separate "View seller's other items" link.

WAC discount less than 10%:

When the WAC discount based on the current WAC price is less than 10%, the system has to hide those postings from the buy marketplace.

Acceptance Criteria:

1. The predefined filters are working as described.
2. The buy page has the fields and icons mentioned.
3. The buy page provides the ability to sort and do advanced filtering.
4. The user is able to search with a phrase.
5. The user is able to search with NDC.
6. The user is able to search using the bar code / QR code scanner
7. The marketplace is correctly filtered based on Pharmacy state restriction
8. The marketplace is correctly filtered to show only seller's items after adding to cart.
9. The user is able to switch to full marketplace when viewing a specific seller's marketplace.

Screen Prototype

1. Buy Menu

US 22 - Mobile My Postings and Edit a posting

WBS #	<table><tr><th>Key</th><th>Summary</th><th>Updated</th><th>Due</th><th>Assignee</th><th>Status</th><th>Resolution</th><th>Sprint</th></tr><tr><td>MRX-319</td><td>Mobile-UAT-WBS 136 Modified date should display either the original posting date or the last modified date. Currently only displays a date when the posting has been modified.</td><td>Aug 21, 2018 08:09</td><td></td><td>rajasekar.jeyakumar@htcindia.com</td><td>CLOSED</td><td>Unresolved</td><td>Sprint 5</td></tr><tr><td>MHX-120</td><td>WBS 137: Mobile Delete Posting</td><td>Mar 07, 2018 07:45</td><td></td><td>Maguesh Balakrishnan</td><td>IN STAGING</td><td>Unresolved</td><td>Sprint 5</td></tr><tr><td>MHX-119</td><td>WBS 136: Mobile Edit Posting</td><td>Mar 07, 2018 07:45</td><td></td><td>Maguesh Balakrishnan</td><td>IN STAGING</td><td>Unresolved</td><td>Sprint 5</td></tr></table>3 issues
Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered user of MRX 3.0 mobile app, I want the view all my open posting and the ability to edit a posting so that I can change the details of a posting

End Objective:	To provide a page for registered users to view and edit their postings
User/Actor:	Primary users and Secondary users of MRX 3.0 mobile app
Program Type:	Mobile app
Trigger:	Click on "Sell" Menu My Postings
Related User Story:	US 8 - MRX 3.0 & Mobile - Post an item & US 14 - MRX 3.0 My Postings and Edit a posting
Related WBS #:	136-137

Related WBS description

136	As a pharmacy user, I want to be able to edit my posting and to delete it. I want the system to notify me on success or failure. Member cannot edit an open posting for a full bottle and change to a partial pack. Must delete original posting and create new. When changing price and/or qty, current WAC is used in calculation, not WAC from original posting. Item should be displayed at the top of the marketplace when saved. When user clicks on edit in "my posting", notify user that WAC price will be updated if user enters edit screen. Confirm before continuing.

137	As a pharmacy I want to be able to edit my posting and to delete it. I want the system to notify me on success or failure. Member cannot edit an open posting for a full bottle and change to a partial pack and vice versa. Must delete original posting and create new.

Business Rules

My postings

This page will be part of the "Sell" menu and it will list all the open postings of a particular member in the form of the card. The card will have the following fields.

1. Product Name
2. NDC
3. Lot #
4. Expiry Date
5. Strength
6. Packaging
7. Qty available
8. Ship Promo
9. WAC discount % (Calculated based on current WAC and not based on the WAC at the time of posting)
10. Price
11. Modified Date
12. Delete (trash can) icon

The posting should be sorted by last modified field (newest first) but the postings which have less than 10% WAC discount (lowest first) will be at the top. If the WAC discount is less than 0%, display 0%. When there is at least one posting with less than 10% of WAC discount, this message should be displayed on top of the table "Postings with WAC discount of less than 10% will not display in the marketplace. Adjust the WAC discount to 10% or more."

When the user clicks on a posting, edit a posting page should open. . If the user clicks Delete trash can icon, a warning message should be displayed requesting the user to confirm the delete.

The user should be able to

1. Sort using
    a. Product Name
    b. Expiry Date
    c. WAC discount % (Calculated based on current WAC and not based on the WAC at the time of posting)
    d. Modified Date
2. Search by drug name and NDC using a search bar (different from global search bar used for searching buy marketplace) or barcode/QR code scanner.

The page should have infinite scrolling.

Edit a posting

The user will land here, when the user clicks on edit icon of a card in the "My postings" page or the "Buy" menu.

Refer US 14 - MRX 3.0 My Postings and Edit a posting - Edit a posting

BR_database

Refer US 14 - MRX 3.0 My Postings and Edit a posting - BR_database

BR_Edit when item was ordered

Refer US 14 - MRX 3.0 My Postings and Edit a posting - BR_Edit when item was ordered

BR_Edit when item in cart

Refer US 14 - MRX 3.0 My Postings and Edit a posting - BR_Edit when item in cart

Acceptance Criteria:

1. The user is able to view all the fields mentioned in My postings
2. The user is able to sort based on all the fields mentioned in My postings
3. The postings with WAC discount less than 10% is always at the top
4. The user is able to search a posting using NDC #
5. The user is able to search a posting using Drug Name
6. The user is able to edit a posting in the edit posting page
7. If the user clicked "Edit" button from Buy marketplace, the user should be redirected to Buy marketplace page after clicking Update or Delete button.
8. If the user clicked "Edit" button from My postings page, the user should be redirected to My posting page after clicking Update or Delete button.
9. The system should show the message Do you want to delete this posting?", when a user deletes a posting

Below acceptance criteria should be tested when order related functionalities are built.

1. When a user updates an posting which has a open order in life-cycle, the order should not be updated.
2. When a user updates an posting which has a completed order, the order should not be updated.
3. When a user updates an posting which has been placed in the cart by another user, the user should receive either of the message

   "Item(s) in your cart have changed/removed. Please review and submit order again" (when one or more items have been changed or removed by sellers)

   "The seller has informed us that the item is no longer available" (when all items in the cart have been removed by sellers)

Screen Prototype

My postings & Edit a Posting page

Match_RX_App_V04_my postings and Edit postings.pdf

US 23 - BO List of all Postings in MRX 3.0

WBS #

Key	Summary	Updated	Due	Assignee	Status	Sprint
MHX-1347	WBS 187 After setting vacation mode in SF,	Sep 24, 2018 06:33		Raja Ponnuswamy	OPEN	
MHX-261	WBS 187: BO - MRX Remove (hide) existing posting from the marketplace	Mar 07, 2018 07:49		Swapna.Patnaikuni	IN STAGING	Sprint 6
MHX-127	WBS 189: BO - EDIT posting details from 3.0	Mar 07, 2018 07:46		Swapna.Patnaikuni	IN STAGING	Sprint 5
MHX-126	WBS 188: BO - Review posting details from 3.0	Mar 07, 2018 07:46		Swapna.Patnaikuni	IN STAGING	Sprint 5
MHX-125	WBS 186: BO - Review List of all postings regardless of Posting Status	Mar 07, 2018 07:46		Swapna.Patnaikuni	IN STAGING	Sprint 5
MHX-124	WBS 185: BO - Review List of all postings[Search,Export,Print]	Mar 07, 2018 07:46		Swapna.Patnaikuni	IN STAGING	Sprint 5
MHX-123	WBS 184: BO - Review List of all postings from 3.0	Mar 07, 2018 07:46		Swapna.Patnaikuni	IN STAGING	Sprint 5

7 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a back office user of MatchRx, I want the ability to view all postings by all pharmacies so that I can know the details of the posting.

End Objective:	To provide a system for the back office users to view by all pharmacies' postings and its details
User/Actor:	Back office users of MatchRX
Application:	Salesforce
Trigger:	
Related User Story:	US 8 - MRX 3.0 & Mobile - Post an item & US 14 - MRX 3.0 My Postings and Edit a posting

Related WBS Description:

184	Display all postings from all pharmacies with the following info: - Posting Id; - NDC; - Name (item); - Seller (pharmacy name); - State (state symbol); - Posted (date & time); - Modified (date & time); - Expires (date); - Qty (integer); - original posted qty - Method (from dictionary); - Min price (money); - Max price (money); - Current (money); - Current Total (money); Current $ x Qty - Total Posted (money); Original posted qty x Current - AAWP (decimal (percent)); - WAC (decimal (percent)); - Pack Type (boolean); - Full pack size (decimal); - Actual Pack size (decimal); - Strength (string); - Packaging (string); - Storage (N or R); Normal or Refrigerated - Lot (string); - Condition (from dictionary); - Ship method (from dictionary); - Shipping paid by (from dictionary); - Deleted (boolean); - Description (string).
185	Ability to do the following for above list. I want to: - search the list; - mange view of the list (number of records per page, sorting, navigation); - export the list to CSV/XLS file; - print the list.

186	As BO user, I wants to view record of all postings regardless of posting status I want predefined list views with relevant list items filtering, list columns & list sorting for each stage of transaction: - Active; - Hidden [temporarily removed from marketplace to be then shown again e.g. vacation mode] - deleted, [removed foreverfrom marketplace but still shown for BO]- sold - expired postings
187	As BO user i want to Remove (hide) chosen posting(s) from the marketplace. Check if the posting is not in active order lifecycle - allow action. E.g. If a seller posted an item with qty 5. Let's say an order for 2 is in active order life cycle. If the BO user wants to hide this posting, then the BO user can hide the 3 items which are showing in the marketplace currenty. If hide - mark as hidden in BO, leave them in BO list, remove from marketplace - ability to unhide only by the BO - so that items will be again visible on Marketplace. Post's visibility can be controlled by BO. If delete - remove totally from marketplace, still display as "removed" at BO. Ability to select mutliple posting at once and perform an action.
188	As BO user I want to see posting details : - Posting Id; - NDC; - Name (item); - Seller (pharmacy name); - State (state symbol); - Posted (date & time); - Modified (date & time); - Expires (date); - Qty (integer?); - Qty LS (integer?); - Method (from dictionary); - Min price (money); - Max price (money); - Current (money); - Current Total (money); Current $ x Qty - Total Posted (money); Original posted qty x Current - AAWP (decimal (percent)); - WAC (decimal (percent)); - Pack Type (boolean); - Full pack size (decimal); - Actual Pack size (decimal); - Strength (string?); - Packaging (string?); - Storage (?); - Lot (string?); - Condition (from dictionary); - Ship method (from dictionary); - Shipping paid by (from dictionary); - Deleted (boolean); - Description (string). - is refrigerated (yes/no) Status of the posting to be displaued - Active; - declined posting - Archived. (deleted posting)
189	As a BO user, I need the ability to edit 3.0 posting details

Business Rules

BR_Postings Basic Search

The Back office user should be able to search for posting using the Global search

BR_List of Postings Page

The default view should display a grid with the following columns and the ability to sort

1. Posting ID
2. NDC
3. Drug Name (item)
4. Seller (pharmacy name)
5. Seller State Code
6. Posted (date & time)
7. Modified (date & time)
8. Expires (date)
9. Qty Available (integer) (Current qty in marketplace)
10. Original Qty posted (integer)
11. Min price (money)
12. Max price (money) (original Max price posted)
13. Current (money) (price displayed in markteplace currently)
14. Current Total (money) (Current $ x Qty available)
15. Original Posted Total (money) (Max Price $ * Original Qty posted)
16. Current WAC discount (percent)
17. WAC discount when posted (percent)
18. Pack Type (P or F)
19. Full pack size (decimal)
20. Actual Pack size (decimal)
21. Strength (string)
22. Packaging (string)
23. Storage (N or R); Normal or Refrigerated
24. Lot (string)
25. Sealed/Unsealed (Sealed or Unsealed)
26. Package condition (Torn package label, Sticker/Glue residue, X" on container, Writing on container)
27. Ship method (Fedex ground/Fedex two day/Fedex overnight)
28. Shipping paid by (buyer/seller)
29. Status (Active, Expired, Deleted, BO Hidden, Vacation Hidden, Sold)
30. Images
31. Seller Notes (string)

BR_Predefined List views

The user should have the following predefined list views with the above mentioned fields.

1. Active
2. Vacation Hidden [temporarily removed from marketplace to be then shown again e.g. vacation mode]
3. BO hidden (temporarily removed from mktplace by a BO user and to be shown again)
4. Deleted, [removed forever from marketplace but still shown for BO]
5. Sold
6. Expired postings

The user should be able to manage the number of results per page (pagination).

BR_ BO Hide & Delete Postings

The BO user should be able to hide/delete the selected posting(s) from the marketplace. The BO user should be able to select multiple postings and perform the action.

Before hiding/deleting, the system has to check if the posting has any active order in the order life-cycle. If not, the system should allow action of hiding/deleting the entire posting. If there is a order in the lifecyle, the system should hide/delete only the quantity which is not in active order life-cycle.
For e.g. If a seller posted an item with qty 5. Let's say an order with qty 2 is in active order life cycle. If the BO user wants to hide/delete this posting, then the system can hide/delete the 3 qty which are currently shown in the marketplace currently.

Once hidden/deleted from the marketplace, the posting should be marked as hidden/deleted but still be view-able by the BO user. The BO user should also have the ability to un-hide a posting which will display the posting in the marketplace. The FO user should not be able to un-hide a BO user hidden posting. The BO should not be able to undo a delete of posting.

BR_Posting Details

When the user clicks on the Posting ID, the user should be redirected to details page which will have the same fields as mentioned in *BR_List of Postings Page*

BR_Edit Posting

The BO user should be able to edit the posting in SalesForce. The business rules mentioned in US 8 - MRX 3.0 & Mobile - Post an item and US 14 - MRX 3.0 My Postings and Edit a posting will not be applicable. Editing through salesforce can override those business rules.

BR_Expiring Postings

On every 16th of the month (12:00 AM EST), the postings that are expiring on the same month should be removed from the marketplace. The postings should also be not visible on US 14 - MRX 3.0 My Postings and Edit a posting - My Postings page and US 22 - Mobile My Postings and Edit a posting - My Postings page. The status of these postings should be marked as "Expired" on Salesforce screens.

Back Office User Access Rules

Page Visibility/User Role	Admin	Accountant	IT	CSR Lead	CSR Team	Sales Manager	Sales Team	Compliance Manager	Marketing	Member Trainer	Utilization Manager	Wholesaler Manager
List of Postings Page	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	No
Active	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	No
Hidden	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	No
Deleted	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	No
Sold	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	No
Expired	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	No

List of Postings Page Fields & Posting Details Page fields /User Role	Admin	Accountant	IT	CSR Lead	CSR Team	Sales Manager	Sales Team	Compliance Manager	Marketing	Member Trainer	Utilization Manager	Wholesaler Manager
1. Posting ID	R	R	R	R	R	R	R	R	None	R	R	None
2. NDC	R	R	R	R	R	R	R	R	None	R	R	None
3. Drug Name (item)	R	R	R	R	R	R	R	R	None	R	R	None
4. Seller (pharmacy name)	R	R	R	R	R	R	R	R	None	R	R	None
5. Seller State Code	R	R	R	R	R	R	R	R	None	R	R	None
6. Posted (date & time)	R	R	R	R	R	R	R	R	None	R	R	None
7. Modified (date & time)	R	R	R	R	R	R	R	R	None	R	R	None
8. Expires (date)	R	R	R	R	R	R	R	R	None	R	R	None
9. Qty Available (integer) (Current qty in marketplace)	RE	R	R	R	R	R	R	R	None	R	R	None
10. Original Qty posted (integer)	R	R	R	R	R	R	R	R	None	R	R	None
11. Min price (money)	R	R	R	R	R	R	R	R	None	R	R	None
12. Max price (money) (original Max price posted)	R	R	R	R	R	R	R	R	None	R	R	None
13. Current (money) (price displayed in markteplace currently)	R	R	R	R	R	R	R	R	None	R	R	None
14. Current Total (money) (Current $ x Qty available)	R	R	R	R	R	R	R	R	None	R	R	None
15. Original Posted Total (money) (Max Price $ * Original Qty posted)	R	R	R	R	R	R	R	R	None	R	R	None
16. Current WAC discount (percent)	R	R	R	R	R	R	R	R	None	R	R	None
17. WAC discount when posted (percent)	R	R	R	R	R	R	R	R	None	R	R	None
18. Pack Type (P or F)	R	R	R	R	R	R	R	R	None	R	R	None
19. Full pack size (decimal)	R	R	R	R	R	R	R	R	None	R	R	None
20. Actual Pack size (decimal)	RE	R	R	R	R	R	R	R	None	R	R	None
21. Strength (string)	R	R	R	R	R	R	R	R	None	R	R	None
22. Packaging (string)	R	R	R	R	R	R	R	R	None	R	R	None
23. Storage (N or R); Normal or Refrigerated	R	R	R	R	R	R	R	R	None	R	R	None
24. Lot (string)	RE	R	R	R	R	R	R	R	None	R	R	None
25. Sealed/Unsealed (Sealed or Unsealed)	RE	R	R	R	R	R	R	R	None	R	R	None
26. Package condition (Torn package label, Sticker/Glue residue, X" on container, Writing on container)	RE	R	R	R	R	R	R	R	None	R	R	None

27. Ship method	RE	R	R	R	R	R	R	R	None	R	R	None
28. Shipping paid by	RE	R	R	R	R	R	R	R	None	R	R	None
29. Status (Active, Expired, Deleted, BO Hidden, Vacation Hidden, Sold)	RE	R	R	RE(Edit only for Active to BO hidden or vice versa)	RE(Edit only for Active to BO hidden or vice versa)	RE(Edit only for Active to BO hidden or vice versa)	RE(Edit only for Active to BO hidden or vice versa)	R	None	R	RE(Edit only for Active to BO hidden or vice versa)	None
30. Images (only user uploaded images - max 2)	RE	R	R	RE	RE	RE	RE	RE	R	R	R	R
31. Seller Notes (string)	RE	R	R	R	R	R	R	R	None	R	R	None

R - Read   E - Edit   None - Not visible

Acceptance Criteria

List of postings page

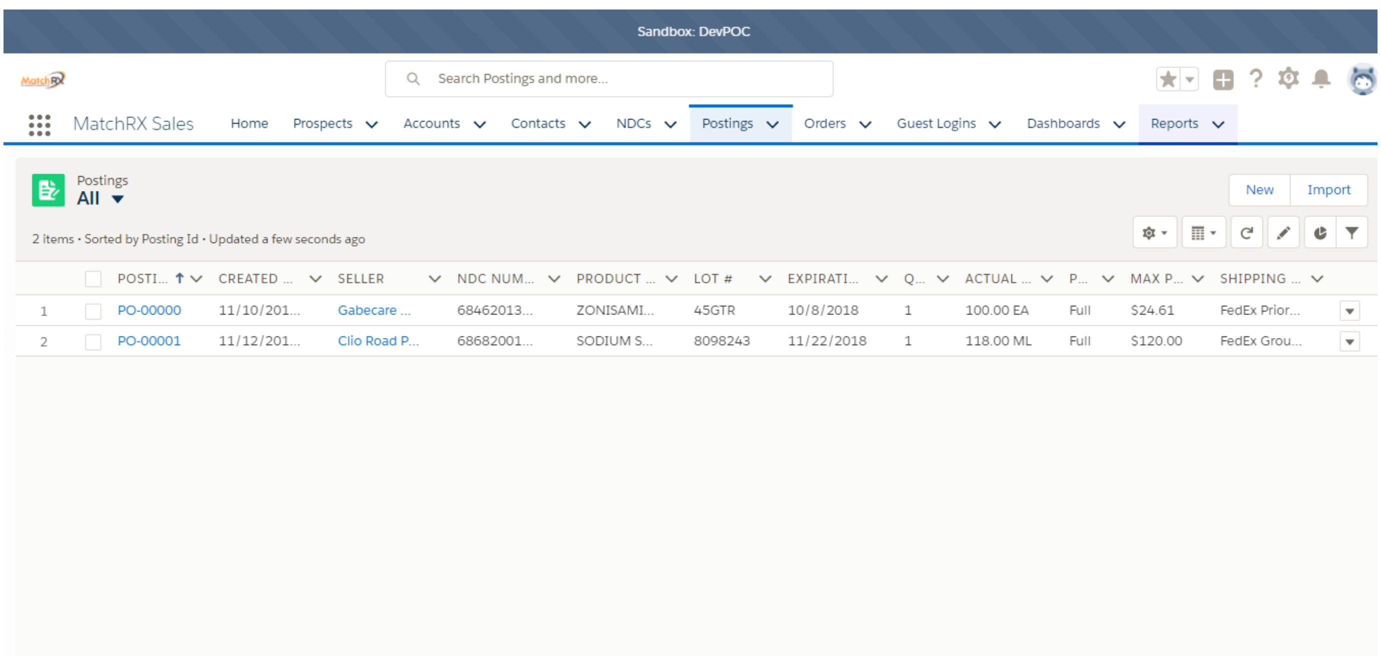
1. has the correct default columns
2. user role marketing is not able to view this page

Posting Details page

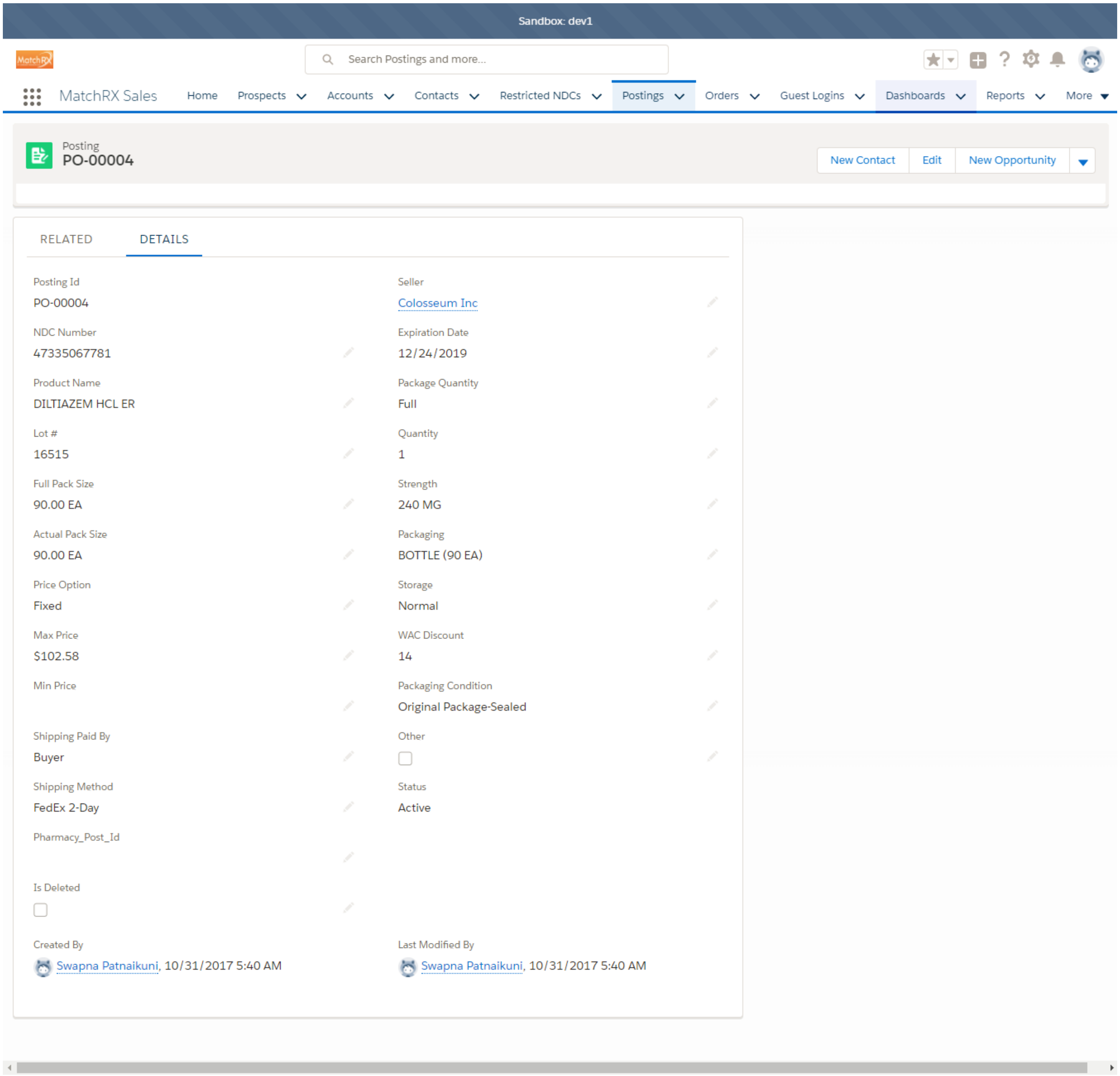
1. has the correct fields
2. Only user role admin has access to editing/deleting a drug

Screen Prototype

1. List of Postings Page



2. Posting Details Page



US 24 - VM Buy Menu

WBS #								
	Key	**Summary**	**Updated**	**Due**	**Assignee**	**Status**	**Resolution**	**Sprint**
	MHX-309	WBS 108: PHP VM List of Items	Jun 25, 2018 08:17		Karthigaichamy Malaimegam	IN QA	Unresolved	Sprint 10
	MHX-306	WBS 104: VM Quick Search	May 30, 2018 07:09		Karthigaichamy Malaimegam	OPEN	Unresolved	Sprint 9
	MHX-305	WBS 103: VM Search for a Product	May 30, 2018 07:09		Karthigaichamy Malaimegam	OPEN	Unresolved	Sprint 9
	MHX-41	WBS 102: PHP VM Marketplace Buy page	May 30, 2018 07:09		Karthigaichamy Malaimegam	IN QA	Unresolved	Sprint 9
	MHX-40	WBS 101: PHP VM Buyer Homepage	Jul 05, 2018 12:31		Karthigaichamy Malaimegam	IN QA	Unresolved	Sprint 9
	5 issues							
Document status	APPROVED							
Document owner	Raghul Manoharan							
UI Developer								
Developers								
QA								

Table of Contents

User Story

As a registered active user of VM Buyer website, I want a search bar and buy menu so that I can search, view and filter all the live VM posting in the marketplace.

End Objective:	To provide search functionality and section to view and filter all live VM postings
User/Actor:	Registered Primary and Secondary user of VM Buyer
Program Type:	Web application
Trigger:	Buy tab on the left menu and the search bar will be found on all pages after successfully logged in.
Related User Story:	
Related WBS #:	101-104, 108

Related WBS description:

101	A Large Search Bar Top bar with drop downs for - Categories - Sale - Popular Items - Contact us - New Arrival - Manage Profile Slide show for featured products 3 lines of Featured categories with products Ability for the admin to edit the above featured items. Footer with static content and links e.g. about us, contact us, documents.
102	Filters tab on the left. Search within filters. Product grid with large product images, product title, short description, price and add to cart. Clicking the product will take the user to the detail product page. The number of items listed on a page will be defined value and the page will not have infinite scrolling
103	As a buyer I want to use a simple form allowing to: - search by the name of the item (or category) - Suggest search terms based on characters entered by the user. - promo items relevant to the search should be listed first in the results - Search results should a grid similar to Buy marketplace page. - filter marketplace by Vendor so that the application displays a filtered list of posted items matching the search phrase.
104	As a buyer, when typing my search phrase in the quick search form, I want the application to display the list of 10 items with names beginning with the string (sorting: alphabetical). * The prompting should begin as I type the first letter. The list of the prompted items should be refreshed each time any character in the quick search form changes. * The list items should be displayed as categories For each prompted item: * the inputted search phrase should be visually distinguished in the item's name; * the item should act as a button resulting with changing the search phrase for the phrase equal to the list item display phrase. For no prompt results: a notification "No results!" should be displayed.
108	As a buyer I want to be able to sort the items using a drop down (alphabetically, price, item rating, newest posting).

Business Rules

Categories Menu

The "Buy" (Similar to Buy in MRX 3.0) menu will be on the left pane on all pages once logged in. "Buy" menu will contain the following four tabs.

- All Products
- Popular Products
- New Products
- Clearance

The Categories list will be displayed on mouse over. The list of categories can be found in US 37 - BO VM Posting Categories. The tertiary category "Sales and Closeouts" will have all the items with sales promo active in that particular secondary category. The tertiary category "All..." will have all the items found in that particular secondary category. The term item and product are interchangeable used and it means the same.

When the user selects a category, above the marketplace grid, the system should display the category breadcrumb with hyperlinks (e.g. Category 1 Sec. Category 3 Tert. Category 2). When the user clicks on one of the link, the user should be redirected to that category.
The marketplace grid should have the following fields for each product. Most of the information will be provided when the item is posted. Refer US 34 - VM Post item to know details about the data.

1. Product Name
2. Price (Two prices possible when the item is on sale. Original and Sale price)
3. MSRP (Suggested Retail Price)
4. Images (on mouse over the page should display the 2nd image for that particular product if available)
5. Promotion (If yes, a tag on top of the image with text "Sale")
6. Last bought on '{date} (displayed if the UPC was previously purchased by the member in the last 365 days.)

The following information will be represented as icons

Icon	Active	Inactive	Information

Add to wishlist	UPC in wishlist	UPC not in wishlist	User can click on to add and remove UPC from the wishlist. If the product doesn't have a UPC, then only that product (posting) is saved in the wishlist.
Free shipping	If free shipping is provided	Not displayed	

The user will be able to sort the products (all products and not just the products in the page) on the following parameters.

1. Price (low to high)
2. Price (high to low)
3. Relevance
4. Newest (Latest updated/posted at the top)

Default sort - Latest updated/posted item will be at the top. When an product name is searched, the default sort should be based on the relevance. Relevance will be inactive if search is not performed.

The page should provide the following advanced filters (default value = any). The user should have the ability to reset all filters at once. The user should also be able to save a particular filter combination (only one) and subsequent saves will overwrite the previous filter combination saved.

Filter	Options
Category	All categories should be available. The user should be able to select multiple categories. When a search is performed, the options should be limited to the categories that the search result belongs to. When a category is selected, the options should be limited to categories under the selected category.
Seller	List all sellers with a search field. When a search is performed, the options should be limited to the sellers that the search result belongs to. When a category is selected, the options should be limited to sellers that the results belongs to.
Free Shipping	Yes / No
Discount %	< 25% / 26% - 50% (25% to 26% will also be part of this option. The system should always round up the discount % to round number.) / `> 50%

The page will have three additional pre-defined filters as tab next to "all postings". It should be possible to use the above mentioned advanced filters on pre-defined filters list

Pre-defined filter	Rules
Promo	Product which have sale promo active will be listed in this section.
Popular Items	Items purchased the most by unique pharmacies in the last 365 days. 100 most popular items should be shown.
New Products	A new posting is considered a new product. A posting edited recently is not considered as a new product. This page should have products posted in the last 60 days only. It should be sort latest posted first.

The page should have pagination at the bottom of the page

- "number of items per page" drop-down menu (10/25/50/100/200 items per page) - Default value 100
- navigation between pages of results;
- Results sum-up ("showing results X to YYY from ZZZ. Page A of B.").

Search

The search bar should be available on all pages if the user is logged in. This search bar will only search for items in "Buy" menu.

A user may enter the search phrase (name of the item), UPC number or scan the bar-code/QR code using a handheld scanner. To use handheld scanner for search, the user has to activate the search by clicking on the search field. The system should search as soon as the scanner recognizes a bar-code/QR code. If the user types in the search field, the user should be able to submit the search phrase by either typing enter key or tab key on the keyboard or by clicking the magnifying glass icon on the screen.

When the user types the search phrase,the system displays the list of 10 items with names beginning with the string (sorting: alphabetical). The prompting should begin immediately after the first letter is typed. The list of the prompted items should be refreshed each time any character in typed.

For each prompted item in the list
- the inputted search phrase should be visually distinguished in the item's/categories' name;
- when the user clicks on a result, the system should start the search.

The system should redirect the user to the "Buy" Menu page displaying a filtered list of posted items matching the search phrase. The default sort will be based on relevance.

The system should search the term/number entered in the following fields in the following order of preference.

1)UPC

2) Product Title

3) Tags

4) Product Description

If the system does not find any results for the search term, the system has to display the Amazon search result page as explained in BR_Amazon

BR_Amazon

When the user searches for an item and if the system doesn't find any results, the system has to display the "The item you are searching for is not available in the marketplace. You are being redirected to Amazon in a new tab" and provide two buttons: "Proceed" and "Cancel".

If the user clicks "Proceed", the system should open Amazon result page for the search term as a new tab and the user should land in the newly opened Amazon tab. The system should use the affiliate code when connecting to Amazon. Any activity within Amazon need not be tracked by our system (Few examples: An order placed in amazon website will not be available in the "My orders" section of the VM application and our system will not handle the order life-cycle. The user will also not be able to use the credit card or ACH stored in VM for Amazon purchases.)

If the user clicks "Cancel" or after the user clicks "Proceed", the system should display the VM marketplace with the filter and sort applied prior to the search. If no filter or sort was applied prior to the search, VM full marketplace has to be displayed.

Acceptance Criteria:

1. The predefined filters are working as described.
2. The buy page has the fields and icons mentioned.
3. The buy page provides the ability to sort and do advanced filtering.
4. The buy page has two variants of add to cart button.
5. The user is able to search with a phrase.

Screen Prototype

VM Buy Menu

Match-RX_VM_BUY-V1.pdf

US 25 - BO Member Details Page

WBS #

Key	Summary	Updated	Due	Assignee	Status	Sprint
MHX-1345	WBS 181 Attempted to reset the PW	Sep 24, 2018 06:33		Divyalakshmi	OPEN	
MHX-317	WBS 234: BO - User password. Manage	Mar 17, 2018 12:53		Swapna.Patnaikuni	IN QA	Sprint 7
MHX-316	WBS 233: BO - Review Seller/Buyer User List	Mar 17, 2018 12:53		Swapna.Patnaikuni	IN QA	Sprint 7
MHX-314	WBS 231: BO - Review seller & Buyer details - Column list	Mar 17, 2018 12:53		Swapna.Patnaikuni	IN QA	Sprint 7
MHX-313	WBS 230: BO - Review seller & Buyer details	Mar 17, 2018 12:53		Swapna.Patnaikuni	IN QA	Sprint 7
MHX-292	WBS 227: BO - Deactivate Membership	Mar 17, 2018 12:53		Swapna.Patnaikuni	IN QA	Sprint 7
MHX-239	WBS 228: BO - Manage members Fee setting	May 02, 2018 07:02		Swapna.Patnaikuni	DEVELOPMENT	Sprint 9
MHX-183	WBS 202: BO - Member Dashboard	Mar 07, 2018 07:49		Swapna.Patnaikuni	IN STAGING	Sprint 6
MHX-117	WBS 181: BO - Salesforce - User password. Manage	Mar 07, 2018 07:46		Swapna.Patnaikuni	IN STAGING	Sprint 5
MHX-47	WBS 180: BO - Review Member's Users list (Contacts)	Mar 07, 2018 22:53		Swapna.Patnaikuni	IN STAGING	Sprint 5
MHX-46	WBS 179: BO - Review Member Details (Members name/edit)	Mar 07, 2018 07:46		Swapna.Patnaikuni	IN STAGING	Sprint 5
MHX-44	WBS 177: BO - Deactivate Pharmacy	Mar 07, 2018 07:46		Swapna.Patnaikuni	IN STAGING	Sprint 5
MHX-27	WBS 226: BO -Log in for Seller/Buyer FO	Mar 07, 2018 07:49		Swapna.Patnaikuni	IN STAGING	Sprint 6
MHX-26	WBS 176: BO - Log is for pharmacy FO	Jun 25, 2018 09:13		Swapna.Patnaikuni	IN STAGING	Sprint 6

14 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a back office user of MatchRx, I want the ability to view member's details in a single page so that I can quickly find all information of the member.

End Objective:	To provide a system for the back office users to view member's details
User/Actor:	Back office users of MatchRX
Application:	MRX BO
Trigger:	
Related User Story:	

Related WBS Description:

176	As MRX I want to be able to conduct login as chosen member to MRX 3.0 (user impersonation) VIEW ONLY Another option would be Remote assistance (taking control of member's computer)
177	As a BO user, I want the ability to Deactivate pharmacy . Once deactivated, Members will not be able login through FO all pharmacy postings are hidden from marketplace Notification is sent to primary contact BO user needs to be able to deactivate (cancel and suspend) a membership. Any orders within the lifecycle will either be canceled through the BO or allowed to complete, depending on the reason for deactivation. This will be decided with each unique case. Regardless, any open postings will need to be hidden (if suspended) or removed (if canceled) from the marketplace. The system should not automtically cancel the orders that are withinn the lifecycle for canceled accounts

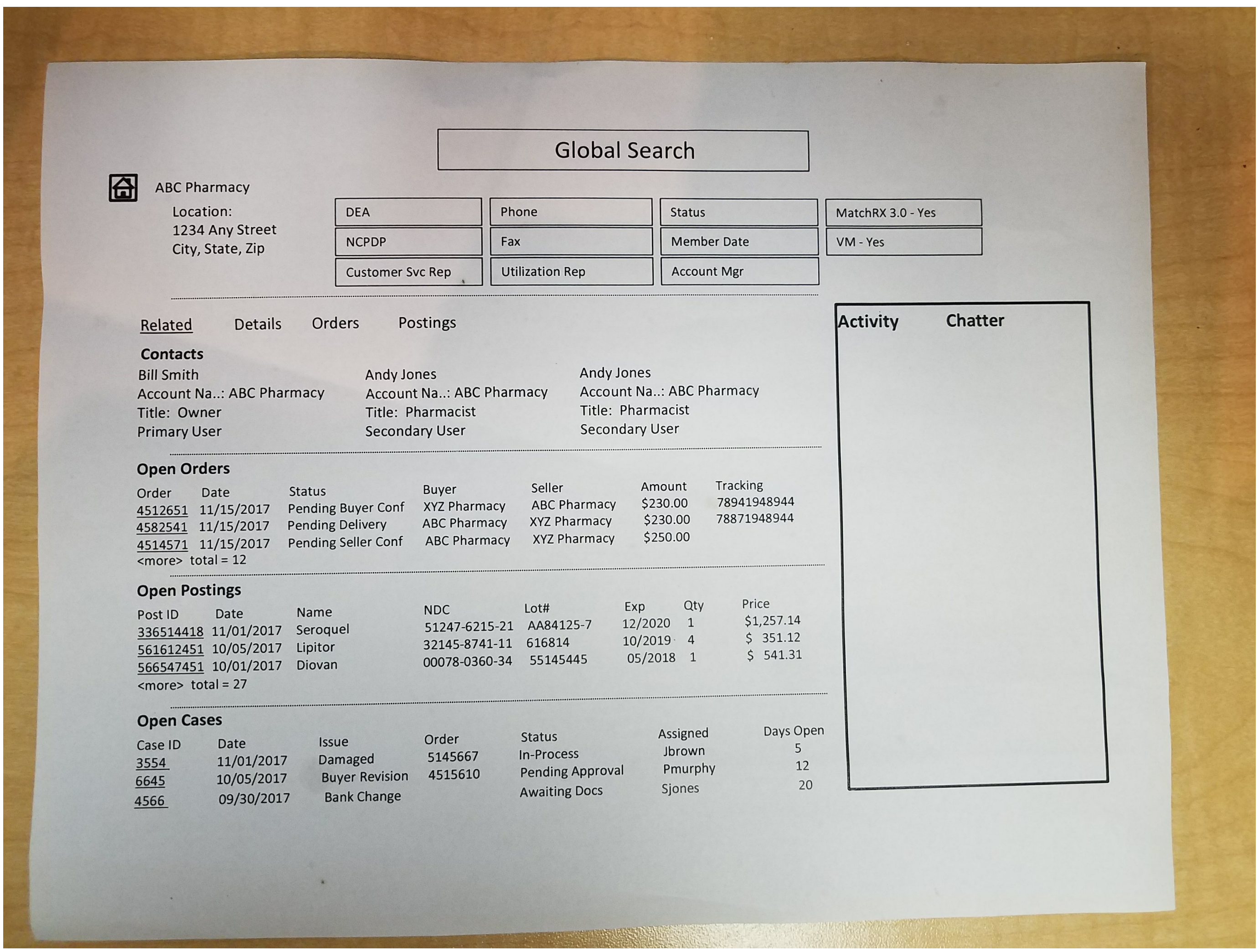
179	As BO user I want to review Members' details: - Membership Status; - Group; - AR [Sales Person; assigned] - update copy from "AR" to Sales Rep" - CSR [Customer Service Rep assigned] - DEA; - Legal Business Name; - DBA; - Primary contact: - First Name; - Last Name; - Mobile; - Address; - Address2; - City; - State; - Zip Code; - Phone; - Fax; - Email; - Npi Number; - NCPDP Number; - State License Number; - State License Date; - DEA Date; - Date Added; - Bank Info Date Added; - Promo Code; - Referred by; A BO user may be able to edit the above information based of the access role.
180	As BO user I want to review Member's users as a list with columns - Column "First Name" (first name); - Column "Last Name" (last name); - Column "Title/Position" (title/position); - Column "Mobile" (mobile phone number); - Column "Email" (email address); - Column "Primary Contact" (Yes/No); - Column "Receive Notifications Via Email" (Yes/No); - Sales: Item Sold (Yes/No); Payment Submitted (Yes/No) - Purchases: Shipmnet Notification (Yes/No); Delivery Notification (Yes/No) - Wishlist: (yes/No) - Column "Receive Notifications Via Text" (Yes/No). - Sales: Item Sold (Yes/No); Payment Submitted (Yes/No) - Purchases: Shipmnet Notification (Yes/No); Delivery Notification (Yes/No) ---- Test SMS through twilio. I want to: - search the list; - mange view of the list (number of records per page, sorting, navigation); - export the list to CSV/XLS file; - print the list. A BO user may be able to edit the above information based on the access role.
181	Send and/or reset member's password As BO user, I want to reset the password of a registered member so that system sends him a new one or an instruction how to define a new password.
202	Member Dashboard View Seller/Buyer details structured (general/ users / accounting / postings / orders (sell/buy))
226	As MRX I want to be able to conduct login as chosen member to VM FO (user impersonation) VIEW ONLY Another option would be Remote assistance (taking control of member's computer)

227	Deactivate VM Membership Once deactivated, members can not login to VM FO All eller postings are hidden from marketplace Notification will be sent to primary contact As a BO user, I need the ability to deactivate (cancel and suspend) a membership. Any orders within the lifecycle will either be canceled through the BO or allowed to complete, depending on the reason for deactivation. This will be decided with each unique case. Regardless, any open postings will need to be hidden (if suspended) or removed (if canceled) from the marketplace. The system should not automatically cancel the orders that are within the lifecycle.
228	MRX to control the selling fee unique to the vendor. This is the amount that MatchRX retains when settling the financial transaction with the vendor. Fee's could be different between vendors depending on what is being sold. Fee terms are decided manually during the vendor negogiation. As a BO user, I need the following three fee options to assign to a seller. 1) % of sale. The % value will be entered by BO user per vendor and the BO user should have the ability to change the % value. 2) Fixed price per month. The fixed price value will be entered by BO user per vendor and the BO user should have the ability to change the fixed price value. 3) Tier pricing: A BO user have the ability to edit any of the below fields Sale Volume/ month Seller A(/listing) Seller B(/listing) 1 - 100 $1 $2 101-500 $0.75 $1 501 & above $0.50 $0.50
230	Member Dashboard View Seller/Buyer details structured (general/ users / accounting / postings / orders (sell/buy))
231	As BO user I want to review Members' details (as applicable to buyer/seller): - Membership Status; - Group; - AR [Sales Person; assigned] - update copy from "AR" to Sales Rep" - DEA; - Legal Business Name; - DBA; - Primary contact: - First Name; - Last Name; - Mobile; - Address; - Address2; - City; - State; - Zip Code; - Phone; - Fax; - Email; - Npi Number; - NCPDP Number; - State License Number; - State License Date; - DEA Date; - Date Added; - Bank Info Date Added; - Promo Code; - Referred by; A BO user may be able to edit the above information based of the access role.

233	As a BO user, I want to review Member's users as a list with columns - Column "First Name" (first name); - Column "Last Name" (last name); - Column "Title/Position" (title/position); - Column "Mobile" (mobile phone number); - Column "Email" (email address); - Column "Primary Contact" (Yes/No); - Column "Receive Notifications Via Email" (Yes/No); - Column "Receive Notifications Via Text" (Yes/No). ---- Test SMS through twilio. I want to: - search the list; - mange view of the list (number of records per page, sorting, navigation); - export the list to CSV/XLS file; - print the list. A BO user may be able to edit the above information based of the access role.
234	Send and/or reset member's password As a BO user, I want to reset the password of a registered member's user so that system sends him a new one or an instruction how to define a new password.

Business Rules

BR_Member details page design



The design is common for both MRX 3.0/VM Buyer member and VM Wholesaler member. The fields under each section might be different and some sections may not be available for VM wholesaler.

Section 1 - Header section - Important details of a Member pharmacy / VM Company provided during registration

Section 2 - Details section - All details of a Member pharmacy / VM Company provided during registration

Section 3 - Related section - High level information of the Open Orders, Open Posting, Open Cases and the list of contacts

Section 4 - Order - This tab will have all orders

Section 5 - Postings - This tab will have all postings

Section 6 - NCPDP - This tab will have DataQ information and user entered information. This tab will be visible only for pharmacy members and not for VM wholesalers.

Section 7 - Financial Transactions - This tab will contain the financial transaction details

Section 8 - Activity & Chatter section - Salesforce built-in functionality

Fields and Access levels for the above sections are defined in the attached file :

US 25 - Access Grid.xlsx

Updated file for Sprint 7 with VM wholesaler details - US 25 - Access Grid_Feb 22.xlsx

Updated file for Sprint 9 with VM fee field - US 25 - Access Grid_Apr 17.xlsx

Update file for Sprint 12 with mobile app push notification preference - US 25 - Access Grid_Jun 23.xlsx

BR_Section 3 Related

This section is further divided into following four sub-sections

1. Contacts
2. Buy Orders
3. Sell Orders
4. ~~Postings~~
5. Cases

Contacts

This sub-section will have the following read only fields and these fields are applicable to both MRX/VM Buyer and VM Wholesaler.

1. Full Name (Hyperlinked to open contact mentioned in attached excel)
2. Title
3. User access

Please refer to US 6 - Pharmacy/VM Wholesaler Menu - Contacts Manager to know more about the adding, editing and deleting a contact.

Additionally, the BO user should be able to edit (subscribe/unsubscribe) the wishlist notification feature for the contacts.

Gatekeeper - The BO user should be able to add a contact who will not have access to the FO website and not visible in the Contacts Manager page for any pharmacy user. These contacts are visibile only on the SalesForce screen.

Contact status is changed to deleted when the contact is deleted by a BO user or by the pharmacy user on the website.

Buy Orders:

This sub-section will have the latest orders (based on the Order Date) bought by the member. Applicable only for MRX 3.0 and VM Buyer

Sell Orders:

This sub-section will have the latest orders (based on the Order Date) sold by the member. Applicable only for MRX 3.0 and VM Wholesaler

~~Postings:~~

~~This sub-section will have the latest postings (based on modified date). Applicable only for MRX 3.0 and VM Wholesaler~~

Cases

This sub-section will have the latest cases.

Section 6 - NCPDP

MRX/VM Buyer

This section will have two subsections split vertically and both subsections will have the following fields. The left side DataQ sub section will be populated using DataQ data and it is Read only. This data will be regularly updated using DataQ file sent from MatchRX server. The fields on the right side user-entered sub section will be populated by the fields mentioned in *Section 2 Details (duplication of data and not new fields in the Salesforce DB).* This data will also be read only. The user has to use the Details tab to make changes

Notifications:

The fields that are updated since the last DataQ file will be provided by MatchRX (out of scope for HTC) and the fields that would require notification to a BO user will also be identified by MatchRX (out of scope for HTC). HTC will have to build the required setup in salesforce to notify the BO user.

Section 8 - Activity & Chatter section

Built in sales-force functionality

- To know the details of the latest communication between MatchRX company and the member.
- To create new cases/tasks
- Assigning new tasks or re-assigning existing tasks to other members
- Ability to chat with other salesforce users of MatchRX

BR_Vacation Settings

The BO user should be able to temporarily hide all the postings of a member from the marketplace. The BO user should choose the start date and end date.

This should be a button in the Postings tab. If vacation mode is set, display the end date. When the button is clicked, it should popup with the content,

"Temporarily hide member's postings from the marketplace by choosing Start and end date"

and display the following fields

Start date: Calendar option - has to be current date or a future date

End Date (including): Calendar option - has to be current date or a future date and has to be same or after start date.

Confirm button.

Once the BO user sets the vacation mode, the BO user will be able to change the start date and the end date without turning off the vacation mode and see the below message

"The member is currently in vacation mode and their postings are temporarily hidden from the marketplace. Member's postings will be visible on (end date + 1}".

The BO user will also have the option to turn off the vacation mode.

The BO user will be able to set only one set of vacation dates.

The FO member should also be able to do it from the website screen - US 14 - MRX 3.0 My Postings and Edit a posting - Vacation Mode button

BR_Disable Buy and Sell

Buy disabled, sell disabled and buy & sell disabled will be options in the field "Membership status" mention in the Section 1. All three options will be applicable to pharmacies and only disabled Sell option will be applicable to VM wholesalers. The FO users will not be able to enable or disable this settings on their own from the website. If both buy and sell are disabled, the FO users will still have access to other functionalities except Buy and Sell tab

When "buy & sell disabled" or "Sell disabled" is enabled, all the member's postings will be hidden from the marketplace (US 23-BO List of all Postings in MRX 3.0-BR_BO Hide & Delete Postings). Orders will not be cancelled automatically

BR_Suspension & Closed

When the BO user sets the membership status to suspended, all users of the member cannot log into the website. Orders will not be cancelled automatically. When the member is suspended, all the member's postings will be hidden from the marketplace.

When the BO user sets the membership status to closed, all users of the member cannot log into the website. Orders will not be cancelled automatically. When the member is closed, all the member's postings will be deleted and removed from the marketplace.

BR_Log in as member

The BO user should have the ability to log into to the MRX 3.0 and VM wholesaler website as a primary user of that member. The system should track which BO user logged into which member's account. Salesforce should have a button which will open the MRX 3.0 or VM wholesaler website on a new tab, when clicked. The website should not request for DEA, username and password. The BO user should be logged in automatically.

BR_Reset password

The BO user should have the ability to trigger the reset password email to a particular primary or secondary user of a member. This should be a button on the Section 2 - Contacts page. The email with the link to reset password should be sent to the email address in the file for the user. The Reset password button should be disabled for "finance" and "No access" user.

BR_New Member workflow

US 25 - Task creation.xlsx

US 25 - VM Wholesaler Task creation.xlsx

Acceptance Criteria

1. The design of the page should resemble the picture attached at the start of the user story.
2. The fields listed in the attached excel should be available and access is correctly defined
3. The BO user is able to view, edit, delete and add users of pharmacy.
4. The BO user will be able to add a pharmacy user with user role Gatekeeper.
5. the fields are correctly populated based on the member type (VM Wholesaler or MRX & VM Buyer member)
6. The BO user is able to successful trigger the reset password email to the user's email.
7. The BO user is able to log in to the FO website of a member (pharmacy) as a primary user.
8. When BO user logs in to FO website, the system should logs which BO user has logged in to which member account with time-stamp.
9. The BO user should be able to switch on vacation mode from Salesforce. When a user logs in FO, the vacation mode must be switched on My postings page
10. The BO user should be able to switch off vacation mode from Salesforce. When a user logs in FO, the vacation mode must be switched off My postings page
11. The BO user should be able to disable buy and sell for MRX & VM Buyer users.
12. The BO user should be able to disable sell for VM Wholesalers
13. When BO user changes membership status to Suspended, users of the pharmacy should not be able to log in. The postings of the member should be hidden from marketplace.
14. When BO user changes membership status to Closed, users of the pharmacy should not be able to log in. The postings of the member should be set to status "Deleted"

US 26 - Mobile Product Details

WBS #

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-880	WBS 143: Mobile Buy [List view & Product detail view]... Continuation	Mar 07, 2018 07:49		Maguesh Balakrishnan	IN STAGING	Unresolved	Sprint 6
MHX-118	WBS 143: Mobile Buy[Display Additional Information-Icons]	Mar 07, 2018 07:45		Maguesh Balakrishnan	IN STAGING	Unresolved	Sprint 5

2 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered active user of the mobile app, I want a product details page so that I can view detailed information of the product.

End Objective:	A page providing detailed description of the product
User/Actor:	Registered Primary and Secondary user of MRX 3.0
Program Type:	Mobile application
Trigger:	When clicked on a product image/drug name in the "Buy" tab.
Related User Story:	US 21 - Mobile Buy Menu , US 19 - MRX 3.0 Product Details
Related WBS #:	143

Related WBS description:

143	As a user, I want the application to display additional information (icons) on the item condition: - Package condition (1 of 5 options: D = Damaged / TPL = Torn Package Label / ONS = Original Non-Sealed / OS = Original Sealed / OT = Other); - Previously Purchased (Active = previously purchased / Inactive = not purchased before); - Free Ground Shipping (1 of 3 options: Inactive = No shipping offer available; $50 = Free Ground Shipping on items of $50 or more; 200= Free Ground Shipping on orders of 200 or more); - Add this item to your Wishlist (Active = item not in user's Wishlist [clickable - adds item to user's wishlist, no front-end feedback] / Inactive = item already in user's Wishlist); - G = Generic Equivalents [link to modal pop-up dialog "Item details", tab "Generic Equivalent"]; - Compare Prices (Active = there are postings to compare [link to modal pop-up dialog "Item details", tab "Compare Prices"] / Inactive = there are no postings to compare); - Refrigerated Item (Active = the item is refrigerated / Inactive = the item is non-refrigerated). These information will be available in the product page but not in the buy marketplace or search result page

Business Rules

When a user clicks on the product image or the drug name on the "Buy" page, a new page with the below information will be opened. The user can return to "Buy" page using the Back button.

Refer US 17 - MRX 3.0 Buy Menu to get details about the various fields mentioned below.

Item Details

The item details should be displayed in the same order as web. US 19 - MRX 3.0 Product Details

1. Drug Name
2. Photos (Medi-span image as default). Photo gallery let the user view more photos.
3. Generic Name
4. Strength - Single / Multi (when Multi - hyperlink to provide a popup and display all the ingredients e.g check NDC 68001013100 in MRX 2.0)
5. Form
6. Storage
7. Packaging
8. Package Condition
9. Labeler/Mfg
10. Shape
11. Seller Notes (Comments mentioned in the seller notes description text box and the 4 check boxes under Package condition (optional) should be displayed here)
12. NDC
13. Lot Number
14. Package Quantity
15. Package Price
16. Unit Price
17. WAC Discount (Calculated based on latest WAC price and not the WAC price when posting was created)
18. Expiration Date
19. Shipping Method
20. Quantity Available
21. Quantity required (user entry field)
22. Estimated delivery date (Fedex API - calculated based on seller's ZIP code and buyer's ZIP code, shipping method selected by the seller, shipping date will be +2 business days of current date) (Question mark icon - Other conditions could impact the delivery date)
23. Add to wishlist
24. Add to cart (Three colors possible. Date, if applicable)

The following information will be represented as icons

Icon	Active	Inactive	Information
Price comparison	If there is at least one other posting of the same NDC	If there is no other posting of same NDC	When the user clicks on this icon, the app should show all the postings of this particular NDC (clear the filter) in the marketplace. If an item has been added to cart by the user, the results should contain all the postings(of that particular NDC) in the marketplace (not restricted to one seller).
Ship Promo	Displayed only if the seller pays the shipping $50 - for items $50 or more $200- for order $200 or more	If buyer pays the shipping	Clicking on question mark provides "Free shipping on items $50 or more" (If active and $50 option) "Free shipping on orders $200 or more" (If active and $200 option) "No free shipping options available" (if inactive)
Seller Rating	Stars	No stars	

The "add to cart" click-to-action (CTA) button will be of one of the three options

CTA	Trigger	Notes
My posting (Blue)	If the listing was posted by the same member	
Add to cart (Green)	If the NDC was previously purchased by the member in the last 12 months. If more than 12 months, display Orange "Add to cart"	Display information on last purchase date only if purchases in the last 12 months.
Add to cart (Orange)	All other scenarios other than above two	

Acceptance Criteria:

1. All the fields are correctly populated
2. The user is able to view user uploaded photos when available.
3. Three different versions of Add to Cart is correctly shown
4. Strength hyperlink displays correctly.
5. Add to wishlist populates correctly when selected.
6. Back button on mobile returns user to the same item on the Buy Page (e.g. If the user clicks the 50th item, views the details and clicks back, the user should be at the 50th item on the Buy Page)
7. When the user clicks "Compare Prices", a new page should open with the current item Frozen at the top and other postings with the same NDC displayed below. If the user clicks on another item, the app should display the item details page of that item with "Compare Price" button disabled. If user clicks back, the user should be shown the compare price page.

Screen Prototype

Image will be added later

US 27 - MRX 3.0 Wishlist

WBS #	
Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-132	WBS 45: PHP Choose items from Wishlist to add in cart	Mar 07, 2018 07:48		Karthigaichamy Malaimegam	IN STAGING	Unresolved	Sprint 6
MHX-131	WBS 44: PHP Wishlist of Items	Mar 08, 2018 09:23		Karthigaichamy Malaimegam	IN STAGING	Unresolved	Sprint 6

2 issues

Table of Contents

User Story

As a registered user of MRX 3.0, I want the ability to view and delete the NDCs that I have added to the wishlist and the ability to view top wishlist items of MatchRX.

End Objective:	To provide a page for registered users to view wishlist-ed NDCs and top wishlist NDCs
User/Actor:	Primary users and Secondary users of MRX 3.0
Program Type:	Web
Trigger:	Click on "Wishlist" Icon on left bar

Related User Story:	US 17 - MRX 3.0 Buy Menu
Related WBS #:	44-45

Related WBS description

44	As a pharmacy I want to have a wishlist of items with columns: - Select list item (check-box); - Item (item name [link to "All postings" site with postings list filtered to this item]); - Compare prices (price [price choosing algorithm not known] [link to "All postings" site with postings list filtered to this item]); - Wish date (date added to wishlist). Column headers allow list sorting. List footer (summary, list navigation). "Remove from wishlist" button (works for selected list items).
45	As a pharmacy i want to have an ability to choose item(s) from a wishlist to add them to my active shopping cart

Business Rules

Wishlist

"Wishlist" menu will have two tabs, My Wishlist and Top wishlist items. When the user clicks on wishlist menu on the left navigation menu, the default tab will be "my wishlist".

My Wishlist

This page will list all the NDCs that have been added to the wishlist by any user of a member pharmacy in a grid. The grid will have the following fields.

Field Name	Rules
☐ (Check box)	Selection - User can check/uncheck to select the NDC. The user should be able to select all postings on the page by click on the check box in the header. When the header check box is checked, the system should display the number of NDCs selected and also provide an option to select all NDCs (across all pages)in the wishlist.
Image	
NDC #	Hyperlinked. When user clicks on the NDC #, the system should search the buy marketplace with the NDC #
Drug Name	Read only field
Available Qty	Mentions the quantity (not the number of postings) available in the marketplace for the NDC.
Wishlist Date	Read only field. Date on which the product was added to the wishlist
Trash can icon	Delete action button to delete the NDC. A warning message should be provided to confirm deletion.

Above the grid, the page will have the message "A summary email will be sent every morning listing all of your wishlist items posted the previous date." By default, the items will be sort by date added to wishlist (newest item added on top).

The user should be able to

1. Select multiple NDCs
2. Sort using all the above fields across all pages. The user should be able to sort based on check box field as well.
3. Options to select all NDCs (display number of NDCs selected), select none and delete selected NDCs

The page should have pagination at the bottom of the page

- "number of items per page" drop-down menu (10/25/50/100/200 items per page) - Default value 100
- navigation between pages
- sum-up ("X to YYY. Page A of B.").

Top wishlist

This page will list the top 100 NDCs that have been added to the wishlist by the users of MatchRX in a grid. The grid will have the following fields.

The top 100 NDCs are the NDCs that are most wishlist-ed by the users of MatchRX.

Field Name	Rules
Rank Number	Rank of the NDC in the top 100 list
Image	
NDC	Hyperlinked. When user clicks on NDC #, the system should search the buy marketplace with the NDC #
Drug Name	Read only field
Add to Wishlist	A button for the user to add the NDC to his/her wishlist.
Post this item	A button for the user to post the NDC. When the button is clicked, the system should display the "Post an item" tab under the "Sell" menu with the NDC field pre-filled with the NDC #.

Above the grid, the page will have the message "Top 100 Wishlist Items : The following are Wishlist items with the highest demand in the marketplace. If you have these items in overstock, post them on MatchRX today!"

The user should be able to

1. Sort using all the above fields except add to wishlist and Post this item.

The top 100 NDCs should be displayed on a single page.

Acceptance Criteria

My wishlist page:

1. The user is able to sort the wishlist using all the fields
2. The user is able to sort based on check box field
3. The user is able to select multiple NDCs and delete
4. The user is able to select all NDCs and select none

Top Wishlist page:

1. The user is able to sort the list using all the fields except Add to wishlist
2. The user is able to add a NDC to their wishlist
3. The user is able to remove a NDC from their wishlist

Screen Prototype

My wishlist page

Grand Value Pharmacy (AG1337078)

Click here to chat

MatchRx your overstock solution

My Savings LAST 12 MONTHS $9,376.74

BUY | SELL | MANAGE | MESSAGES | WISHLIST | Quick Search | CLEAR

My Wishlist | Top Wishlist Items

Wishlist (34 Items) - You will be notified by e-mail when a fellow member posts any of your Wishlist items. Use Quick Search to add items to your Wishlist.

Item	Compare prices	Wish Date
CLONIDINE HCL ER 0.1 MG	68	12/13/2017
GLYCOPYRROLATE 2 MG	39	12/13/2017
TRIHEXYPHENIDYL HCL 2 MG	11	10/30/2017
MOMETASONE FUROATE 50 MCG/ACT	113	10/30/2017
TRINTELLIX 5 MG	4	10/25/2017
AMLODIPINE BESYLATE/BENAZ	154	10/25/2017
TEMOZOLOMIDE 5 MG	0	10/25/2017
XARELTO 10 MG	1	10/25/2017
SEROQUEL XR 150 MG	162	10/24/2017
EXEMESTANE 25 MG	26	10/24/2017
BYSTOLIC 2.5 MG	13	10/21/2017
INDOMETHACIN ER 75 MG	59	10/20/2017
ACETAZOLAMIDE 250 MG	85	10/20/2017
BECONASE AQ 42 MCG/SPRAY	1	10/20/2017
SYNVISC 16 MG/2ML	0	10/20/2017
FABIOR 0.1 %	0	10/20/2017
ZENPEP	62	10/20/2017
CIALIS 10 MG	23	10/20/2017
CALCITRIOL 0.5 MCG	31	09/01/2017
DILANTIN 30 MG	13	08/04/2014
XARELTO	1	03/21/2014
BYSTOLIC	18	02/13/2014
SPIRIVA HANDIHALER	1	01/02/2014
SYMBICORT	4	06/14/2012
VENTOLIN HFA 108 MCG/ACT	7	03/30/2012
ALPHAGAN P 0.1 %	0	02/21/2012
AZOPT 1 %	0	10/26/2010
ADVAIR DISKUS	0	09/13/2010
ATRIPLA	0	09/09/2010
VIAGRA 100 MG	2	08/24/2010
QVAR 80 MCG/ACT	0	07/08/2010
QVAR 40 MCG/ACT	0	07/05/2010
CIALIS 20 MG	0	06/21/2010
KEPPRA 500 MG	0	06/21/2010

Home | FAQs | Pricing | Contact Us | Register | Demos | MRX Forms | User Guide | Shipping Center
Privacy Policy | User Agreement | Browser Requirements

Top wishlist page

Grand Value Pharmacy (AG1337078) Your cart is EMPTY Click here to chat

MatchRx your overstock solution

My Savings LAST 12 MONTHS $9,376.74

BUY | SELL | MANAGE | MESSAGES | WISHLIST | Quick Search | CLEAR

My Wishlist | Top Wishlist Items

Top 100 Wishlist Items - The following are Wishlist items with the highest demand in the marketplace. If you have these items in overstock, post them on MatchRX today!

	Demand Level	Item
1.)	High	JANUVIA 100 MG
2.)	High	CRESTOR 10 MG
3.)	High	NEXIUM 40 MG
4.)	High	ABILIFY 5 MG
5.)	High	ABILIFY 10 MG
6.)	High	ABILIFY 2 MG
7.)	High	LIALDA 1.2 GM
8.)	High	LEVITRA 20 MG
9.)	High	WELCHOL 625 MG
10.)	High	ABILIFY 15 MG
11.)	High	CREON
12.)	High	ABILIFY 20 MG
13.)	High	SEROQUEL XR 400 MG
14.)	High	SEROQUEL XR 300 MG
15.)	High	ELMIRON 100 MG
16.)	High	AMITIZA 24 MCG
17.)	High	CLOBETASOL PROPIONATE 0.05 %
18.)	High	VESICARE 10 MG
19.)	High	TRUVADA
20.)	High	DIOVAN HCT
21.)	High	PRISTIQ 50 MG
22.)	High	SENSIPAR 30 MG
23.)	High	CIALIS 10 MG
24.)	High	ZYVOX 600 MG
25.)	High	JANUMET
26.)	High	ABILIFY 30 MG
27.)	High	STRATTERA 25 MG
28.)	High	VYTORIN
29.)	High	ATRIPLA
30.)	High	HYDROXYCHLOROQUINE SULFAT 200 MG
31.)	High	NAMENDA 10 MG
32.)	High	SEROQUEL XR 150 MG
33.)	High	AZOR
34.)	High	FLOMAX 0.4 MG
35.)	High	DEPAKOTE ER 500 MG

	Demand Level	Item
51.)	High	NORVASC 10 MG
52.)	High	PROGRAF 1 MG
53.)	High	TOPROL XL 50 MG
54.)	High	AVALIDE
55.)	High	GEODON 80 MG
56.)	High	TAMSULOSIN HCL 0.4 MG
57.)	High	LAMICTAL 100 MG
58.)	High	SEROQUEL 200 MG
59.)	High	ZYPREXA 10 MG
60.)	High	COUMADIN 5 MG
61.)	High	PROTONIX 40 MG
62.)	High	LAMICTAL 200 MG
63.)	High	LOTREL
64.)	High	HYZAAR
65.)	High	TOPAMAX 100 MG
66.)	High	SEROQUEL 300 MG
67.)	High	XELODA 500 MG
68.)	High	ACTOPLUS MET
69.)	High	SEROQUEL 100 MG
70.)	High	GLEEVEC 400 MG
71.)	High	TOPAMAX 50 MG
72.)	High	ENABLEX 7.5 MG
73.)	High	TEGRETOL-XR 200 MG
74.)	High	UROXATRAL 10 MG
75.)	High	CADUET
76.)	High	MICARDIS HCT
77.)	High	LAMICTAL 25 MG
78.)	High	LASIX 40 MG
79.)	High	GEODON 40 MG
80.)	High	ENTOCORT EC 3 MG
81.)	High	TRILEPTAL 300 MG
82.)	High	NORVASC 5 MG
83.)	High	ZYPREXA 5 MG
84.)	High	ALTACE 10 MG
85.)	High	GEODON 60 MG

US 28 - MRX Cart & Checkout page

WBS #

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-137	WBS 49: PHP Order[Display Checkout option to processing]	Mar 09, 2018 07:26		Senthil Vasan	IN STAGING	Unresolved	Sprint 6
MHX-134	WBS 46: PHP Order[Display a shopping cart preview]	Jun 22, 2018 12:32		Senthil Vasan	IN STAGING	Unresolved	Sprint 6

2 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered active user of MRX 3.0 website, I want a shopping cart widget so that I can preview items in my cart and a checkout page so that I can review and place the order.

End Objective:	To provide shopping cart widget and checkout page
User/Actor:	Registered Primary and Secondary user of MRX 3.0
Program Type:	Web application
Trigger:	Cart icon on the header should show the shopping cart. A button in the cart should open the checkout page
Related User Story:	
Related WBS #:	46, 49

Related WBS description:

46	As a pharmacy I want the application to display a shopping cart preview (simplified shopping cart widget) on all sites and pages, as long as I am logged in: - "Your shopping cart is empty" notification if the cart is empty; - items added to shopping cart with quantity and value; - total value of the cart; - checkout button.
49	As a buyer I want a "checkout" button to start processing my shopping cart towards an order. As a buyer I want to see full shopping cart details: - list of items in the current order (columns: Wishlist; Name; Item info; Strength / Packaging; Exp; % of WAC; Price / Unit (ea); Qty; Total): list of items items added to shopping cart - vendor (grouped per vendor inside the cart view) e.g. Two Suborder Vendor 1 - Ground Shipping Item A Vendor 2 - 2 day shipping Item C - total value of the cart; - checkout button. - option to remove items from cart - option to change item quantity - Change shipping method -- "Change reason for purchase" button per listitem [allows to change the value of choice]; - button "Shop more" [go back to shopping]; - button "Complete order" [finalizes the order & displays order confirmation (order number and total debit value)]. - If purchasing from more than one seller in cart, multiple order numbers will be displayed in order confirmation.

Business Rules

Shopping cart

The shopping cart icon should be available on the header on all pages as long as the user remains logged in. The shopping cart should always display the quantity (not the number of unique NDCs) currently in the cart. When the user is in MRX 3.0, the shopping cart will be specific to MRX 3.0. Items added in VM will not be found in this shopping cart. Similarly, when the user is in VM, the shopping cart will be specific to VM and the items added in MRX 3.0 will not be found in the cart.

The shopping cart will be specific and unique to the user of the pharmacy. If user 1 of Pharmacy A adds an item to the cart, another user 2 of same pharmacy A will not have that item in his/her cart.

~~Once an item has been added to the cart, the quantity ordered will be reserved for the particular user till the user removes the item from the cart or 12 hours from the time it was added, whichever is earlier.~~

The shopping cart should display the following information when the user mouse overs:

- Seller A:
    1. Drug Name

    a. NDC #
    b. Quantity ordered (with ability to edit qty)
    c. Price per unit
    d. Price
    e. Drug total (Quantity ordered x price)
2. Drug Name:
    a. NDC #
    b. Quantity ordered (with ability to edit qty)
    c. Price per unit
    d. Price
    e. Drug total (Quantity ordered x price)
3. Seller Total (sum of Drug total for Drug A and Drug B)

- Seller B:
    1. Drug Name
        a. NDC #
        b. Quantity ordered (with ability to edit qty)
        c. Price per unit
        d. Price
        e. Drug total (Quantity ordered x price)

and so on.

- Cart Total (sum of Seller A Total and Seller B Total)

The shopping cart will also have a checkout button.

If the user hasn't added any item to the cart, the shopping cart will be empty with the message "Your shopping cart is empty".

Checkout Page

When the user clicks on checkout button on the shopping cart widget, the system should load the checkout page with the following information. Items sold by the same seller is grouped as one order. The Buy Menu on the left navigation pane should not be active (should not be filled with Orange).

Once an item has been added to the cart, the quantity added will NOT be reserved for the particular user. It will be available for everyone else in the buy marketplace to purchase. When the user clicks on "Submit Order" in the checkout page, the system has to check the quantity requested in the order and quantity available.If requested quantity is not available, the order should not proceed and the following message should be displayed "Item(s) in your cart have changed/removed. Please review and submit order again". The checkout page should be updated with the latest quantity available. If a particular item has no quantity available, the item has to be removed from the checkout page. If all items are removed from the checkout page, display the message "The seller(s) has informed us that the item(s) is no longer available".

Order Information Sections

- Seller A: (Hyperlink - The user should be taken to Buy marketplace and shown Seller A's other items)
    1. Item #1
        a. All details (except Est delivery date & add to cart) that are shown on Buy page (US 17 - MRX 3.0 Buy Menu)
        b. The user should be able to view product details pop
        c. The user should be able to edit quantity
        d. "Add to cart" will be replaced with "Remove from cart" icon
        e. Drug total (Quantity ordered x price)
    2. Items #2
        a. All details (except Est delivery date & add to cart) that are shown on Buy page (US 17 - MRX 3.0 Buy Menu)
        b. The user should be able to view product details pop
        c. The user should be able to edit quantity
        d. "Add to cart" will be replaced with "Remove from cart" icon
        e. Drug total (Quantity ordered x price)
    3. Item total (sum of Drug total for item #1 and item #2)
    4. Shipping
        a. Shipping method (Ground/Two-day/Priority Overnight) with fee and estimate delivery date
    5. Seller Total (sum of item total and shipping fee)
- Seller B: (Hyperlink - The user should be taken to Buy marketplace and shown Seller B's other items)
    1. Item #1
        a. All details (except Est delivery date & add to cart) that are shown on Buy page (US 17 - MRX 3.0 Buy Menu)
        b. The user should be able to view product details pop
        c. The user should be able to edit quantity
        d. "Add to cart" will be replaced with "Remove from cart" icon
        e. Drug total (Quantity ordered x price)
    2. Items #2
        a. All details (except Est delivery date & add to cart) that are shown on Buy page (US 17 - MRX 3.0 Buy Menu)

    b. The user should be able to view product details pop
    c. The user should be able to edit quantity
    d. "Add to cart" will be replaced with "Remove from cart" icon
    e. Drug total (Quantity ordered x price)
3. Item total (sum of Drug total for item #1 and item #2)
4. Shipping
    a. Shipping method (Ground/Two-day/Priority Overnight) with fee and estimate delivery date
5. Seller Total (sum of item total and shipping fee)

- Shipping note:
    1. Per the MatchRX User Agreement, your order may take up to two business days to process by the Seller. After processing, your order will be shipped via the above selected shipping method."
    2. Please Note: your order(s) may take up to two business days to process by the Seller. After processing, your order(s) will be shipped via the above selected shipping method.
- Grand Total (sum of Seller A Total and Seller B Total)
- Submit order

Maximum number of sellers per shopping cart is 5.

Shipping

Shipping Method:

If an order contains a refrigerated item, display only the priority overnight method and the message "**This order contains a refrigerated item and must ship FedEx priority overnight."** In an order (items sold by same seller), the shipping fee should be calculated based on the below rules.

MatchRX shipping promotions

1. If a seller's order value is $2000 or more, the entire seller's order is upgraded to Two-day shipping at ground price. The user will be able to switch to Ground shipping. The message to be displayed next to Two day shipping option is "Orders for $2,000.00 or more are automatically upgraded to 2-Day for the price of Ground." When the order value is between $1800 and 1999.99 (both inclusive), the system should display the message "Add $'{$2000 minus current order value} to your order and upgrade to 2 Day Express shipping for the price of Ground."
2. MRX Free shipping promo: If a seller's order value is $X or more, the entire seller's order is free ground shipping. Both seller and buyer doesn't pay. The message to be displayed next to ground shipping option is "Free shipping {day of the week} - Free ground shipping for orders over $ {value set by BO user)". On Salesforce, the BO user should be able to schedule the start and end date of the promo (both inclusive). The BO user should also be able to select the days of the week in the scheduled period, the promo will be applicable. The BO user should be able to change the value of X. When the order value is between 90% and 99.9% (both inclusive) of the value set by BO user, the system should display the message "Add $'{value set by BO user minus current order value} to your order to qualify for the free Ground shipping". When free shipping promo applicable on a particular day, the system should display the message " Free shipping {Day of the week} on orders $X or more" on all pages on the center of top white bar.

If one of the NDC is refrigerated or frozen, the entire order should be defaulted to "Priority Overnight" and the user should not be able to change the shipping method.

# No	Offer	Overnight
1	If MRX free shipping promo is active, order qualifies for MRX free shipping promo and order doesn't qualify for seller paid shipping.	Buyer Pays
2	If MRX free shipping promo is active, order qualifies for MRX free shipping promo and order also qualifies for seller paid overnight shipping	Seller Pays
3	If MRX free shipping promo is active, order qualifies for MRX free shipping promo and order also qualifies for seller paid two day/Ground shipping	Buyer Pays
4	Order value is >= $2000	Buyer Pays
5	Order value is >= $2000 and has an NDC paid by seller overnight($200/$50)	Seller Pays
6	Order value is >= $2000 and has an NDC paid by seller ground/two days($200/$50)	Buyer Pays
7	Order qualifies for seller paid shipping and seller has chosen Ground	Buyer Pays

8	Order qualifies for seller paid shipping and seller has chosen Two day	Buyer Pays
9	Order qualifies for seller paid shipping and seller has chosen Overnight	Seller Pays
10	Order qualifies for seller paid shipping. Seller has chosen more than one shipping method and order qualifies for all methods. (e.g. Order value is $200 with 2 NDCs A ($50) and B($150). The seller has selected seller paid ground shipping for NDC A if items values is >= $50 and selected seller paid overnight shipping for NDC B if order value >=$200.)	Seller Pays
11	Order qualifies for seller paid shipping. Seller has chosen more than one shipping method and order qualifies for one method which is overnight. (e.g. Order value is $200 with 2 NDCs A ($50) and B($149). The seller has selected seller paid overnight shipping for NDC A if items values is >= $50 and selected seller paid ground shipping for NDC B if order value >=$200.)	Seller Pays
12	Order qualifies for seller paid shipping. Seller has chosen more than one shipping method and order qualifies for one method which is ground (e.g. Order value is $150 with 2 NDCs A ($50) and B($101). The seller has selected seller paid ground shipping for NDC A if items values is >= $50 and selected seller paid overnight shipping for NDC B if order value >=$200.)	Buyer Pays
13	Order value is < $2000 and the order doesn't qualify for seller paid shipping	Buyer Pays

If order doesn't have a refrigerated or frozen NDC, the user will be able to choose any of the three shipping options.

# No	Offer	Overnight	Two day	Ground
1	If MRX free shipping promo is active, order qualifies for MRX free shipping promo and order doesn't qualify for seller paid shipping.	Buyer Pays	Buyer Pays	MRX pays
2	If MRX free shipping promo is active, order qualifies for MRX free shipping promo and order also qualifies for seller paid overnight shipping.	Seller Pays	Buyer Pays	MRX pays
3	If MRX free shipping promo is active, order qualifies for MRX free shipping promo and order also qualifies for seller paid two day shipping.	Buyer Pays	Seller Pays	MRX pays
4	If MRX free shipping promo is active, order qualifies for MRX free shipping promo and order also qualifies for seller paid ground shipping.	Buyer Pays	Buyer Pays	MRX pays
5	Order value is >= $2000	Buyer Pays	Buyer pays Ground price	Buyer pays
6	Order value is >= $2000 and has an NDC paid by seller for overnight ($200/$50)	Seller Pays	Buyer pays Ground price	Buyer pays
7	Order value is >= $2000 and has an NDC paid by seller for two day ($200/$50)	Buyer Pays	Seller Pays Ground price	Buyer pays
8	Order value is >= $2000 and has an NDC paid by seller for ground ($200/$50)	Buyer Pays	Buyer pays Ground price	Seller Pays
9	Order qualifies for seller paid shipping and seller has chosen Ground	Buyer Pays	Buyer pays	Seller Pays
10	Order qualifies for seller paid shipping and seller has chosen Two day	Buyer Pays	Seller Pays	Buyer Pays
11	Order qualifies for seller paid shipping and seller has chosen Overnight	Seller Pays	Buyer pays	Buyer Pays
12	Order qualifies for seller paid shipping. Seller has chosen more than one shipping method and order qualifies for all methods. (e.g. Order value is $200 with 2 NDCs A ($50) and B($150). The seller has selected seller paid ground shipping for NDC A if items values is >= $50 and selected seller paid overnight shipping for NDC B if order value >=$200.)	Seller pays for shipping methods selected by seller as long as the order qualifies for that shipping method. For other options, Buyer pays. (For the provided example, seller will pay for overnight and ground shipping and buyer will for two day shipping)		
13	Order qualifies for seller paid shipping. Seller has chosen more than one shipping method and order qualifies for one method. (e.g. Order value is $200 with 2 NDCs A ($50) and B($149). The seller has selected seller paid ground shipping for NDC A if items values is >= $50 and selected seller paid overnight shipping for NDC B if order value >=$200.)	Seller pays for shipping methods selected by seller as long as the order qualifies for that shipping method. For other options, Buyer pays. (For the provided example, seller will pay for ground shipping and buyer will for two day and overnight shipping)		
14	Order value is < $2000 and the order doesn't qualify for seller paid shipping	Buyer Pays	Buyer pays	Buyer Pays

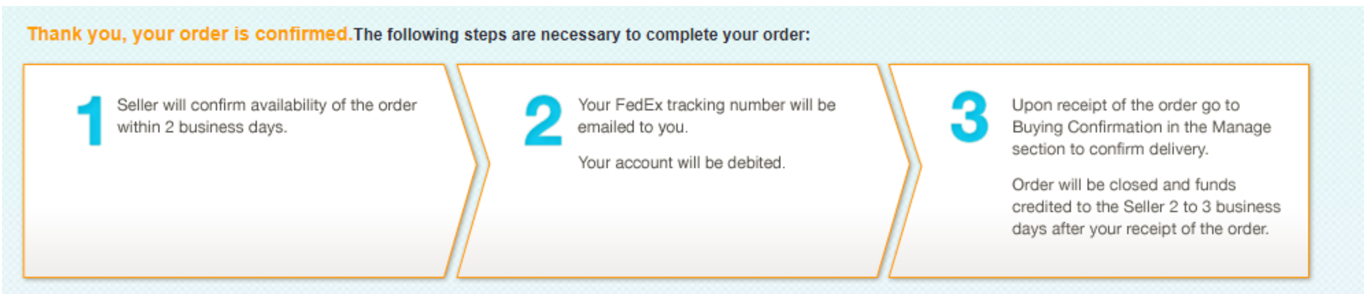
Shipping fee & estimated delivery date:

The system has to send the following information to Fedex to get the fee and estimated delivery date

1. Seller's Zip
2. Buyer's Zip
3. Box dimension & Weight
    a. Two day / Overnight: 12x10x4 inches in dimensions, 4 lbs in weight
    b. Ground: 12x10x2 inches in dimensions, 2 lbs in weight
4. Shipping method

Order Summary:

Once the user places an order, the NDCs in the order should be automatically add to the wishlist. The system should load the next page with below details.



- Seller A
    - Order #
    - Item #1
        - NDC
        - Drug Name
        - Qty ordered
        - Price
        - Drug Total (Quantity ordered x price)
    - Item #2
        - NDC
        - Drug Name
        - Qty ordered
        - Price
        - Drug Total (Quantity ordered x price)
    - Item Total
    - Shipping Fee - Shipping Method
    - Seller Total
- Seller B
    - Order #
    - Item #1
        - NDC
        - Drug Name
        - Qty ordered
        - Price
        - Drug Total (Quantity ordered x price)
    - Item #2
        - NDC
        - Drug Name
        - Qty ordered
        - Price
        - Drug Total (Quantity ordered x price)
    - Item Total
    - Shipping Fee - Shipping Method
    - Seller Total
- Text - "MatchRX will debit bank account `{Bank Name}' - '{last 4 digits of bank account number}' for each order separately when confirmed by the seller."
- Button - 'Continue Shopping'

Acceptance Criteria:

Shopping cart widget & Checkout page:

1. The shopping cart correctly displays the quantity (not the number of unique NDCs) currently in the cart.
2. When the user clicks the shopping cart icon, the app redirects the user to check out page if the shopping cart is not empty
3. If the user hasn't added any item to the cart and clicks the shopping cart icon, the shopping cart widget will be empty with the message "Y our shopping cart is empty".
4. On checkout page, Items sold by the same seller is grouped as one order. Max of five sellers should be allowed per checkout page.
5. Each seller should have a Hyperlink. When clicked, the user should be taken to Buy marketplace and shown Seller's other items
6. Fields mentioned in Business rules section should be correctly displayed.
7. Shipping note should be displayed.

Shipping:

1. When order value is equal to or more than $2000 from a particular seller, the two day shipping price should be same a ground shipping price. The message also should be displayed.
2. When the order value is between $1800 and 1999.99 (both inclusive), the system should display the message "Add $'{$2000 minus current order value} to your order and upgrade to 2 Day Express shipping for the price of Ground."
3. Free shipping promo - When the order value is between 90% and 99.9% (both inclusive) of the value set by BO user and free shipping promo is applicable for the day, the system should display the message "Add $'{value set by BO user minus current order value} to your order to qualify for the free Ground shipping".
4. When free shipping promo applicable on a particular day, the system should display the message " Free shipping {Day of the week} on orders $X or more" on all pages on the center of top white bar.
5. When free shipping promo applicable on a particular day and the order qualifies, the message to be displayed next to ground shipping option is "Free shipping {day of the week} - Free ground shipping for orders over $ {value set by BO user)"
6. Shipping fee, method and payer (Seller/Buyer/MRX) works as explained in the two tables in Shipping sections

Order Summary:

1. All fields & buttons are displayed as mentioned in the user story
2. Order number is hyperlinked to the My order page

Screen Prototype

US 29 - MRX 3.0 My Orders

WBS #	Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
	MHX-207	WBS 64: PHP Orders view [View Cancelled Buy / Sell orders]	Apr 12, 2018 06:29		Varun Sankaranarayana	IN QA	Unresolved	Sprint 8
	MHX-206	WBS 63: PHP Orders view[Buy History]	Apr 12, 2018 09:19		Varun Sankaranarayana	IN QA	Unresolved	Sprint 8
	MHX-205	WBS 62: PHP Orders view[Sell History]	Apr 13, 2018 10:22		Varun Sankaranarayana	IN QA	Unresolved	Sprint 8
	MHX-146	WBS 56: PHP Open Orders - Buy	Mar 08, 2018 09:32		Senthil Vasan	IN STAGING	Unresolved	Sprint 6
	MHX-145	WBS 50: PHP Open Orders - Sell	Mar 08, 2018 09:37		Senthil Vasan	IN STAGING	Unresolved	Sprint 6
	5 issues							

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	

Developers	
QA	

Table of Contents

User Story

As a registered user of MRX 3.0, I want the view all my orders so that I can manage my orders

End Objective:	To provide a page for registered users to view and manage their orders
User/Actor:	Primary users and Secondary users of MRX 3.0
Program Type:	Webpage
Trigger:	Click on "My Orders" Menu
Related User Story:	
Related WBS #:	50, 56, 62 - 64, 66

Related WBS description

50	Order Tab -> Open orders Sale Orders: As a selling pharmacy user, I want to be able to display my order which were sold by me and are still in order lifecyle (order not compeleted) as a list with columns: - "View order" (order number [links to order details] [LOOK: viewing order details]); - "Order date" (date); - "Seller confirmed" (date); - "Product total" (?, money); - "MRX fee" (money); - "Shipping total" (money); - "Credit total" (money); - "Shipping method" (value from shipping methods dictionary) - "Shipping date" (date); - "Expected delivery date" (date); - "Shipping documents" (Incomplete; View/Print [links to "Shipping documents" site]); - "Tracking #" (FedEx tracking number [links to FedEx web page with parcel tracking information); - "Order status" (value from statuses dictionary). The order which require seller's action has to be listed at the top of this list

56	Order Tab -> Open orders Buy Orders As a buying pharmacy user, I want to be able to display orders which were purchased by me and are still in order lifecyle (order not completed) as a list with columns: - "View order" (order number [links to order details] [LOOK: viewing order details]); - "Order date" (date); - "Seller confirmed" (date); - "Product total" (?, money); - "Shipping total" (money); - "Debit total" (money); - "Shipping method" (value from shipping methods dictionary) - "Shipping date" (date); - "Expected delivery date" (date); - "Tracking #" (FedEx tracking number [links to FedEx web page with parcel tracking information); - "Order status" (value from statuses dictionary). The orders that requires buyer's action should be listed at the top of the list.
62	Orders tab -> Sell History As a pharmacy I want to be able to display orders which were sold by me and completed as a list with columns: - "View invoice" (order number [link to invoice]; - "Order date" (date); - "Seller confirmed" (date); - "Product total" (money); - "MRX fee" (money); - "Shipping total" (money); - "Credit total" (money); - "Shipping method" (value from shipping methods dictionary) - "Shipping date" (date); - "Tracking #" (FedEx tracking number [links to FedEx web page with parcel tracking information); - "Buyer confirmed" (date); - "ACH credit date" (value from statuses dictionary).
63	Order tab - > Buy history As a pharmacy I want to be able to display orders which I placed and completed as a list with columns: - "View invoice" (order number [link to invoice]); - "Order date" (date); - "Seller confirmed" (date); - "Product total" (money); - "Processing fee" (money); - "Shipping total" (money); - "Debit total" (money); - "Shipping method" (value from shipping methods dictionary) - "Shipping date" (date); - "Tracking #" (FedEx tracking number [links to FedEx web page with parcel tracking information); - "Buyer confirmed" (date); - "ACH debit date" (value from statuses dictionary).
64	As a pharmacy, I want to be able to see all orders (buys and sells) that were canceled. In 2.0, canceled orders are not displayed. In 3.0, this should be displayed. This will be part of the new "Orders" tab under " Buy or Sell History"
66	As a pharmacy I want the system to prepare the invoice so that I can easily view it (online) and/or print it (pdf).

Order status dictionary

The list of possible statuses for an order are mentioned in US 30 - MRX 3.0 Order Life-cycle - Order Status Dictionary

My Orders

The "My Orders" menu will be on the left pane on all pages once logged in. The sum of number of orders under the section "Action required" (Sales in Progress & Purchases in Progress) should be displayed as superscript on the "My Orders" menu . The "My Orders" menu will contain the following three tabs.

- In Progress
- Sell History
- Buy History

In Progress

This page will list all the active orders sold or bought by a particular member (even items listed by other users of the same pharmacy). Active orders are orders with any status in the Order dictionary other than complete or canceled. The orders will be grouped into two sections, namely:

- Sales in Progress
- Purchases in Progress

Sales in Progress

This page will list all the active orders sold by a particular member (even items listed by other users of the same pharmacy). The grid will have the following fields.

Sorting:

Orders with status "Pending seller confirmation" should always be at the top. After that the orders should be sorted from oldest order date to the earliest. The user should be able to sort using other fields but orders with status "Pending seller confirmation" should always be at the top.

The fields without "X" means that these fields will not be populated and will remain empty always for orders with the mentioned status. The fields with "X" may or may not be populated.

Field Name / Status type	1 - Pending Seller confirmation	2 - Other Statuses	Information
Action/Status	X	X	1 - Button hyperlinked to the order details page. The button Name will named be Confirm Order. 2 - US 30 - MRX 3.0 Order Life-cycle - Order Status Dictionary
Order Number	X	X	Hyperlinked to the order details page
Order Date	X	X	Date on which the order was placed by the buyer
Shipping total	X	X	Seller pays for shipping only when the seller member has selected "Yes" in "Do you want to pay for the shipping" when posting an item (US 8 - MRX 3.0 & Mobile - Post an item) $2.50 is always added to shipping total (even when seller doesn't pay for shipping) if the shipping method is Ground shipping and Free shipping promo (US 28 - MRX Cart & Checkout page - Free shipping promo) is not active.
Credit total	X	X	1 - Item total - MatchRX fee - Shipping fee. ~~If the Credit total is less than or equal to 0, display 0.~~ 2 - Item total - MatchRX fee + MatchMoney - Shipping insurance fee - Shipping fee

Shipping Date		X	~~If shipping method is:~~
			
			• ~~Ground = Add one business day to the date on which tracking number is generated.~~
			• ~~Two Day/Overnight~~
			  ◦ ~~If the tracking number is generated on or later than 2 PM (seller's shipping address timezone), add one business day to the date on which tracking number is generated.~~
			  ◦ ~~If the tracking number is generated before 2 PM (seller's shipping address timezone), shipping date is same as the date on which tracking number is generated.~~
			
			Display the date picked by the seller during seller confirmation process.

Expected Delivery date		X	Based on the date provided by Fedex API. The date has to be updated frequently through Fedex API
Tracking Number		X	Hyperlinked tracking number redirecting to Fedex tracking page (opens in new tab). Received through Fedex API as soon as the seller confirms the order.

Purchases in Progress

This page will list all the active orders bought by a particular member (even items bought by other users of the same pharmacy). The grid will have the following fields.

Sorting:

Orders with status "Seller revised" / "Delivered - Pending buyer" should always be at the top. After that the orders should be sorted from oldest order date to the earliest. The user should be able to sort using other fields but orders with status "Seller revised" / "Delivered - Pending buyer" should always be at the top.

The fields without "X" means that these fields will not be populated and will remain empty always for orders with the mentioned status. The fields with "X" may or may not be populated.

Field Name / Status type	1 - Pending seller confirmation	2 - Seller revised	3 - Delivered - Pending buyer confirmation	4 - / Pending FedEx Pick-up/ Pending FedEx Drop-off / Pending delivery / Buyer Revised / Return / Exchange	Information
Action/Status	X	X	X	X	1 - Pending seller confirmation 2 - Button hyperlinked to the order details page. The button Name will be Confirm Revision. 3 - Button hyperlinked to the order details page. The button Name will be Confirm Receipt 4 - Actual status name
Order Number	X	X	X	X	Hyperlinked to the order details page
Order Date	X	X	X	X	Date on which the order was placed by the buyer
Seller confirmation date			X	X	Date on which the seller confirmed.
Debit total	X	X	X	X	= items(s) total + Shipping total
Shipping method	X	X	X	X	Displayed based on buyer selection during the order placement. (US 8 - MRX 3.0 & Mobile - Post an item)

Shipping Date			X	X	~~If shipping method is:~~
					• ~~Ground = Add one business day to the date on which tracking number is generated.~~
					• ~~Two Day/Overnight~~
					  ◦ ~~If the tracking number is generated on or later than 2 PM (seller's shipping address timezone), add one business day to the date on which tracking number is generated.~~
					  ◦ ~~If the tracking number is generated before 2 PM (seller's shipping address timezone), shipping date is same as the date on which tracking number is generated.~~
					
					Display the date picked by the seller during seller confirmation process.

Expected Delivery date			X	X	Based on the date provided by Fedex API. The date has to be updated frequently through Fedex API
Tracking Number			X	X	Hyperlinked tracking number redirecting to Fedex tracking page (opens in new tab). Received through Fedex API as soon as the seller confirms the order.

Sell History

This section will contain orders sold by the member and has the status complete / canceled. The grid will have the following fields. Default sort will be Order date (most recent at top).

Field Name	Information
Status	Completed / Canceled
Order Number	Hyperlinked to the order details page
Order Date	Date on which the order was placed by the buyer
Seller confirmation date	Date on which the seller confirmed.
Item(s) total	Value of order in $ without including shipping, MatchRX fees and MatchMoney

MatchRX fee	% of order value calculated based on Financial Group the member belongs to (US 18 - BO Manage Pharmacy Group - BR_Financial Group)
MatchMoney	If the seller used MatchMoney during the seller confirmation process, the value of MatchMoney used is displayed. Else, $0 should be displayed
Shipping and insurance fee	Sum of shipping and insurance fee paid by seller Seller pays for shipping, only when the seller member has selected "Yes" in "Do you want to pay for the shipping" when posting an item
Credit total	
ACH Date	The date on which ACH was processed by MMS system.
Delivery date	Based on the date provided by Fedex API. The date has to be updated frequently through Fedex API

Buy History

This section will contain orders bought by the member and has the status complete / canceled. The grid will have the following fields. Default sort will be Order date (most recent at top).

Field Name / Status type	Information
Status	Completed / Canceled
Order Number	Hyperlinked to the order details page
Order Date	Date on which the order was placed by the buyer
Item(s) total	Value of order in $ without including shipping fees
Shipping total	Shipping Fee and insurance fee paid by the buyer
Debit total	
ACH Date	The date on which ACH was processed by MMS system.
Delivery date	Based on the date provided by Fedex API. The date has to be updated frequently through Fedex API
Tracking Number	Hyperlinked tracking number redirecting to Fedex tracking page (opens in new tab). Received through Fedex API as soon as the seller confirms the order.

Order Search & Pagination

The user should be able to search an order based on

- Drug name
- NDC #
- Order #

If the user uses Drug name / NDC, the results should contain orders which contain the drugs / NDC relevant to search term.

In Progress tab will not have any pagination. All orders will be listed in one page.

Buy history and Sell history tab should have pagination at the bottom of the section

- "number of orders per page" drop-down menu (10/25/50/100/200 items per page) - Default value 100
- navigation between pages
- sum-up ("X to YYY. Page A of B.").

BR_database

Each order will have a unique order ID. When a order is updated, the history of previous values should be stored in the history field as a JSON script.

Acceptance Criteria

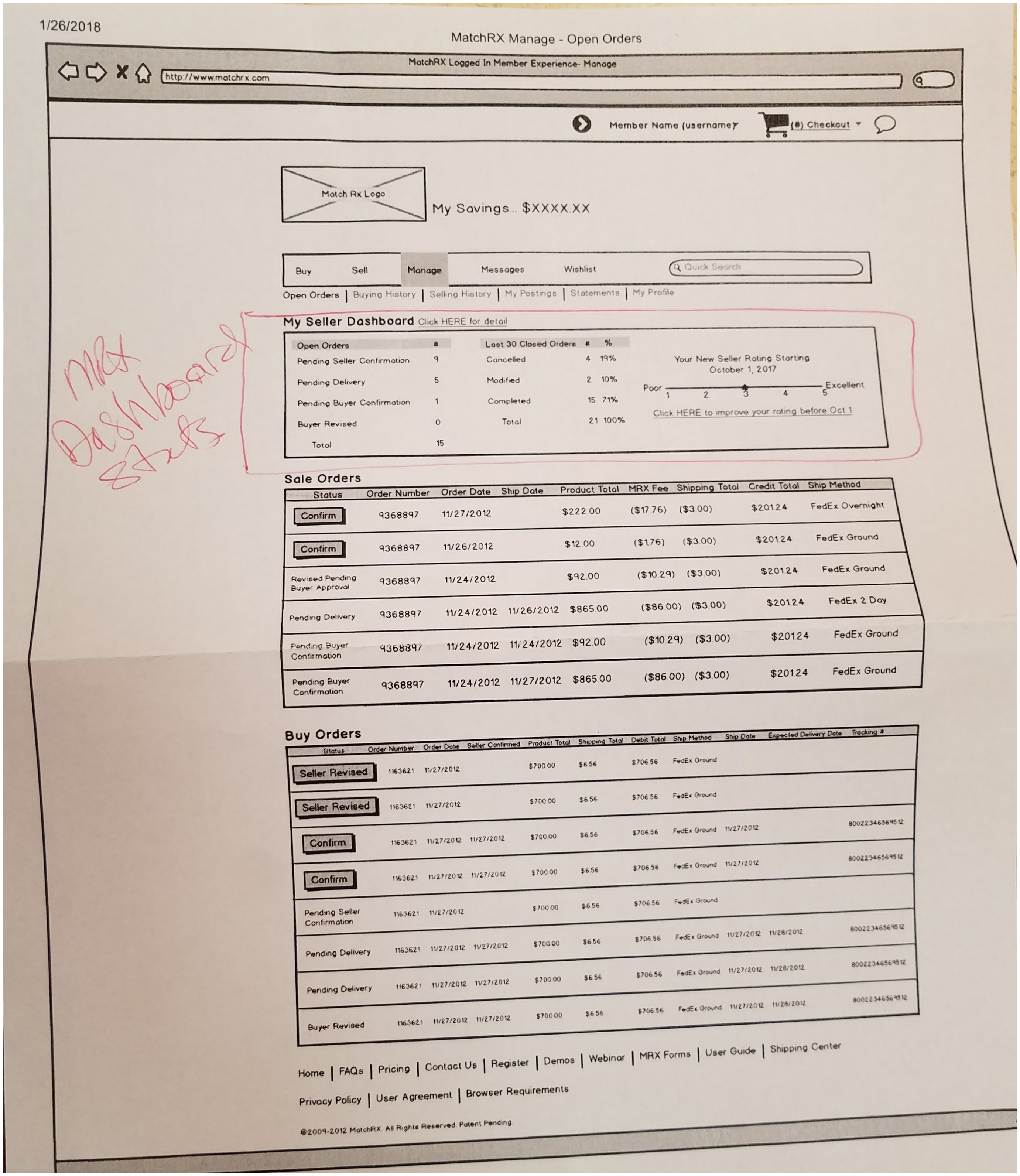
My postings page:

1. The user is able to sort the orders
2. The user is able to search based on NDC and drug name
3. In Progress tab will not have pagination
4. History tabs will have pagination.
5. All fields are populated with correct values (based on formulas/logic mentioned)
6. The orders are correctly categorized based on the order status

Screen Prototype

In Progress Tab:

The section boxed with Red will not be part of this tab and should be removed.



1/26/2018

MatchRX Manage - Open Orders

MatchRX Logged In Member Experience- Manage

http://www.matchrx.com

Member Name (username) (#) Checkout

Match Rx Logo

My Savings... $XXXX.XX

Buy | Sell | Manage | Messages | Wishlist | Quick Search

Open Orders | Buying History | Selling History | My Postings | Statements | My Profile

MRX Dashboard Starts

My Seller Dashboard Click HERE for detail

Open Orders	#
Pending Seller Confirmation	9
Pending Delivery	5
Pending Buyer Confirmation	1
Buyer Revised	0
Total	15

Last 30 Closed Orders	#	%
Cancelled	4	19%
Modified	2	10%
Completed	15	71%
Total	21	100%

Your New Seller Rating Starting October 1, 2017

Poor 1 2 3 4 5 Excellent

Click HERE to improve your rating before Oct 1

Sale Orders

Status	Order Number	Order Date	Ship Date	Product Total	MRX Fee	Shipping Total	Credit Total	Ship Method
Confirm	9368897	11/27/2012		$222.00	($17.76)	($3.00)	$201.24	FedEx Overnight
Confirm	9368897	11/26/2012		$12.00	($1.76)	($3.00)	$201.24	FedEx Ground
Revised Pending Buyer Approval	9368897	11/24/2012		$92.00	($10.29)	($3.00)	$201.24	FedEx Ground
Pending Delivery	9368897	11/24/2012	11/26/2012	$865.00	($86.00)	($3.00)	$201.24	FedEx 2 Day
Pending Buyer Confirmation	9368897	11/24/2012	11/24/2012	$92.00	($10.29)	($3.00)	$201.24	FedEx Ground
Pending Buyer Confirmation	9368897	11/24/2012	11/27/2012	$865.00	($86.00)	($3.00)	$201.24	FedEx Ground

Buy Orders

Status	Order Number	Order Date	Seller Confirmed	Product Total	Shipping Total	Debit Total	Ship Method	Ship Date	Expected Delivery Date	Tracking #
Seller Revised	1163621	11/27/2012		$700.00	$6.56	$706.56	FedEx Ground			
Seller Revised	1163621	11/27/2012		$700.00	$6.56	$706.56	FedEx Ground			
Confirm	1163621	11/27/2012	11/27/2012	$700.00	$6.56	$706.56	FedEx Ground	11/27/2012		80022346569512
Confirm	1163621	11/27/2012	11/27/2012	$700.00	$6.56	$706.56	FedEx Ground	11/27/2012		80022346569512
Pending Seller Confirmation	1163621	11/27/2012		$700.00	$6.56	$706.56	FedEx Ground			
Pending Delivery	1163621	11/27/2012	11/27/2012	$700.00	$6.56	$706.56	FedEx Ground	11/27/2012	11/28/2012	80022346569512
Pending Delivery	1163621	11/27/2012	11/27/2012	$700.00	$6.56	$706.56	FedEx Ground	11/27/2012	11/28/2012	80022346569512
Buyer Revised	1163621	11/27/2012	11/27/2012	$700.00	$6.56	$706.56	FedEx Ground	11/27/2012	11/28/2012	80022346569512

Home | FAQs | Pricing | Contact Us | Register | Demos | Webinar | MRX Forms | User Guide | Shipping Center

Privacy Policy | User Agreement | Browser Requirements

US 30 - MRX 3.0 Order Life-cycle Version 2 (Latest)

WBS #

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-1119	CLONE - WBS 53: Seller Revision	May 21, 2018 06:49		samuel jeya singh	IN QA	Unresolved	Sprint 9
MHX-1116	CLONE - WBS 52: PHP Seller Confirmation[View shipping document]	May 08, 2018 06:15		Senthil Vasan	IN QA	Unresolved	Sprint 9
MHX-275	WBS 68: PHP MRx Notifications	Jun 20, 2018 07:47		Karthigaichamy Malaimegam	IN QA	Unresolved	Sprint 11
MHX-209	WBS 66: PHP Orders view - Prepare Invoice	May 30, 2018 07:08		logesh.karthikeyan@htcindia.com	IN QA	Unresolved	Sprint 9
MHX-208	WBS 65: PHP Orders view - History[Display details of order sold/purchased]	May 30, 2018 07:08		Senthil Vasan	IN QA	Unresolved	Sprint 9
MHX-200	WBS 60: Order Cancellation	Apr 12, 2018 06:28		samuel jeya singh	IN QA	Unresolved	Sprint 8
MHX-197	WBS 59: PHP Mark order as return or exchange	Apr 10, 2018 13:48		Varun Sankaranarayana	IN QA	Unresolved	Sprint 8
MHX-172	WBS 55: PHP Buy revision cancellation	Apr 13, 2018 09:53		samuel jeya singh	IN QA	Unresolved	Sprint 8
MHX-171	WBS 54: PHP Buyer revision acceptance	Apr 12, 2018 06:27		samuel jeya singh	IN QA	Unresolved	Sprint 8
MHX-170	WBS 57: PHP Buy lifecycle (Buyer confirmation)	Apr 13, 2018 10:21		samuel jeya singh	IN QA	Unresolved	Sprint 8
MHX-169	WBS 58: Seller Rating [Rate the seller as a buyer]	Apr 12, 2018 06:27		Varun Sankaranarayana	IN QA	Unresolved	Sprint 8
MHX-149	WBS 53: Seller Revision	Apr 12, 2018 06:26		samuel jeya singh	IN QA	Unresolved	Sprint 8
MHX-148	WBS 52: PHP Seller Confirmation[View shipping document]	Apr 10, 2018 09:21		Senthil Vasan	IN QA	Unresolved	Sprint 7
MHX-147	WBS 51: PHP Seller Confirmation[Display order information]	Apr 10, 2018 11:39		Senthil Vasan	IN QA	Unresolved	Sprint 7

14 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered user of MRX 3.0, I want the view order details so that I can view and take actions on my orders

End Objective:	To provide a page for registered users to view the order details and take action
User/Actor:	Primary users and Secondary users of MRX 3.0
Program Type:	Webpage
Trigger:	Clicks on a hyperlink/button provided
Related User Story:	US 29 - MRX 3.0 My Orders
Related WBS #:	51 - 55, 57 - 60, 65, 66, 68

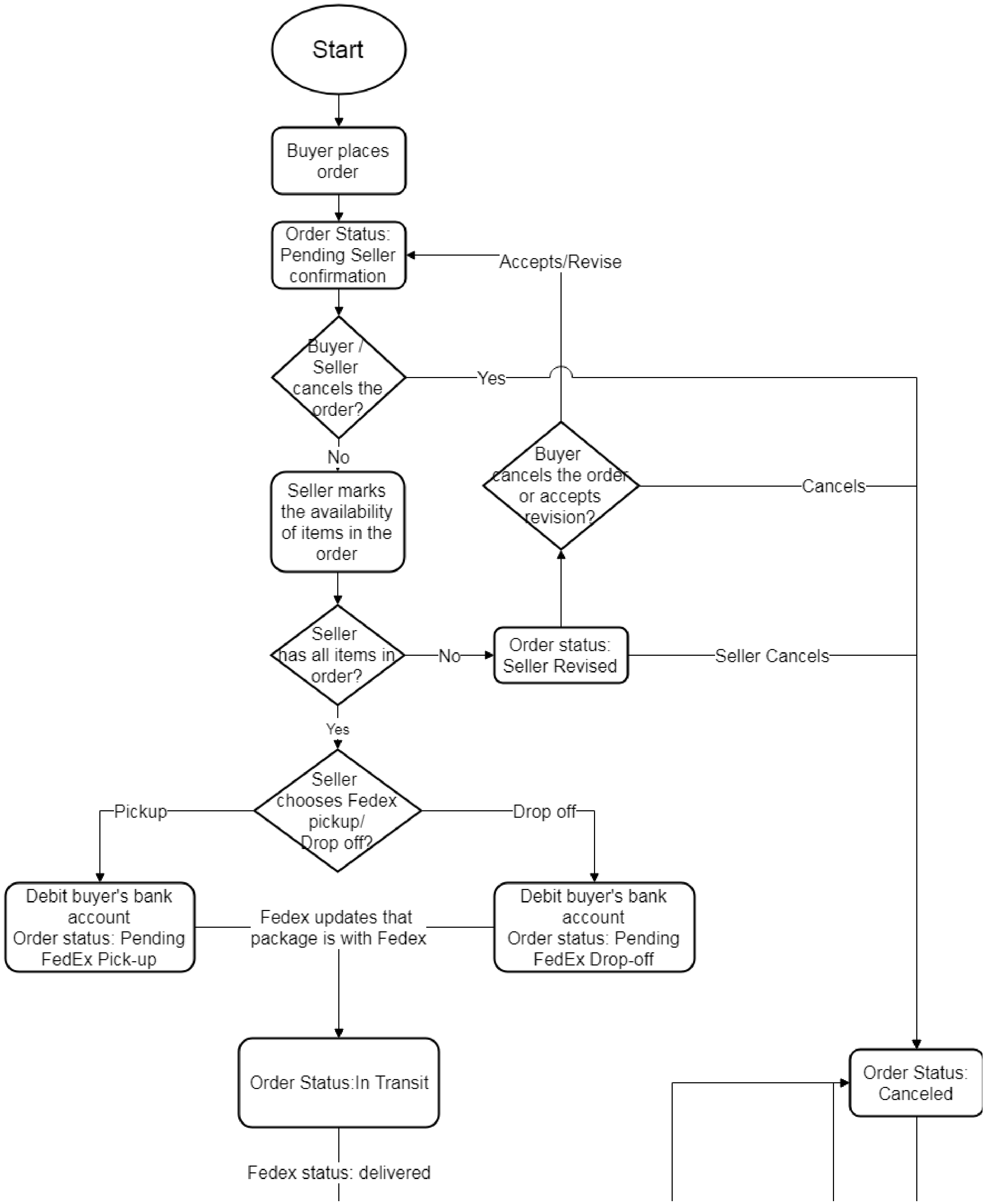
Related WBS description

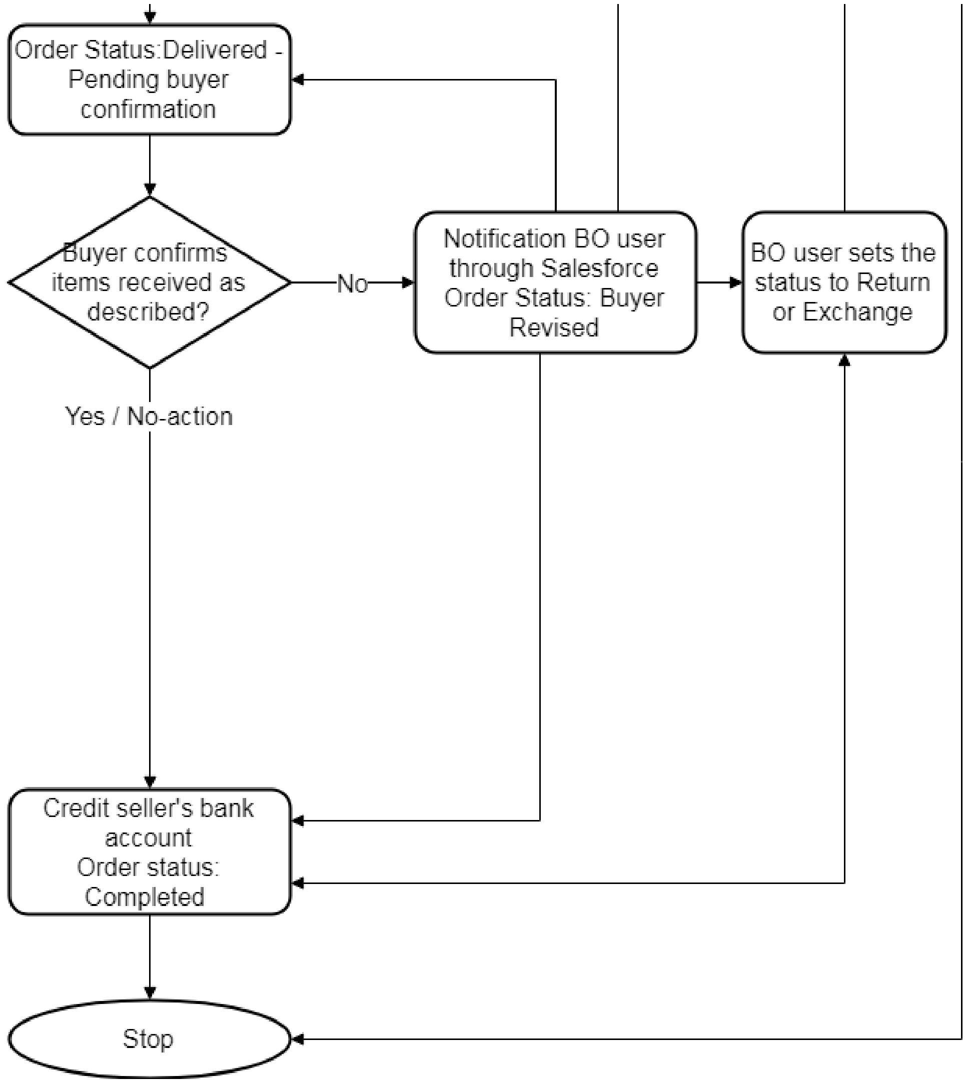
51	As a selling pharmacy user, I want a "confirm shipment" button to display the order information for the seller to edit the order or confirm the order to complete shipment of my sold posting. I want the system to display: - Order Number - list of the items in the order; - "Confirmation status" radio button (Available / Revise); - Seller rating preview; - "Shipment details" form: -- shipping date; -- schedule parcel pick up / drop off; - Financial summary section; - buttons: Cancel; Submit. This will be part of the new "Order" tab - > Open orders page that is being created for 2.0.
52	As a selling pharmacy user, once I confirm the shipment, I want the system to prepare the shipping documents so that I can easily view them (online) and/or print them (pdf). Fedex API integration is required.
53	As a selling pharmacy user, while confirming shipment of my sold posting, I want to be able to inform the buyer that the available quantity of the item has changed. I want to use the "Confirmation status" radio button (Available / Revise) and set it to "Revise" so that the system displays an item revision form: - "Out of stock" check-box; If seller originally posted multiple quantities within the same posting ID, the remaining quantity available in the marketplace should be changed to 0. - "Revised Partial quantity" (number) (active only if item was posted as "Pack quantity" = Partial); - "Revised full packages" (number) (active only if item was posted as "Pack quantity" = Full and ordered quantity is >1); - "Note" (string); - Buttons: Cancel; Save revision [display seller confirmation without shipment details. This will be part of the new "Order" tab - > Open orders page that is being created for 2.0. When clicked on Order number/Action button, the order details page have to show up with the above options. Business Rules: - If partial pack, seller cannot enter an amount equal or greater than the original posting quantity. - If partial pack, cannot change to a full pkg. - It is a violation of MatchRX policy to convert a full pack to a partial pack during the seller revision process. -If a full pack, seller cannot increase the quantity ordered. - State restriction that are applicable to posting an item

54	As a buying pharmacy user, I want to be able to accept an order after it was revised by the seller. The buyer is notified based on the notification setting. This will be part of the new "Order" tab - > Open orders page that is being created for 2.0. When clicked on Order number/Action button, the order details page have to show up with the above options.
55	As a buying pharmacy user, I want to be able to cancel an order after it was revised by the seller. After item was cancelled due to some reasons - posting of corresponding items in the order - disappears so that Vendor needs to post it again with usual posting procedure so that it would be availabe on a marketplace again. The order history information will be stored in the Database and displayed to BO. Currently, an email is sent to the buyer with options "Accept" and "Cancel". In 3.0, the buyer should have the ability to accept or cancel in the website. This will be part of the new "Order" tab - > Open orders page that is being created for 2.0. When clicked on Order number/Action button, the order details page have to show up with the above options.
57	As a buying pharmacy user, I want to be able to confirm the receipt an order (after it was confirmed or after it was revised by the seller and accepted by me). I want the system to display: - Ordered items with "Available" radio button (Yes / No) for each list item; - "Seller rating" form (stars); - Financial summary section; - buttons: Cancel; Confirm. The buyer has two business days to confirm the receipt of the order. After 2 days, the order is manually marked as confirmed. For the BO, the list of order which has crossed the two business day mark will be displayed. I want the system to deactivate the seller rating form if I set Available = No for one or more ordered items. Develop forms/fields (CRM Case Management) to capture more information about the issue from the buyer.
58	5 stars system. As a buyer, I will be able to rate the seller from 1-5 and select a reason from a pre defined drop down.
59	To have an ability as a buyer to mark that i need a return or exchange of an order (set "return" for order and add comment). We need to develop a CRM form (case management form) to capture the reason for return information. The return and exchange process is still has to be handled manually by the BO user.
60	Both Buyer and seller should have an ability to cancel the order. Seller has the ability today to cancel during the seller confirmation. Buyer is unable to cancel after seller confirmation, they must call customer service and get it cancelled through the BO. We want the buyers to be able to cancel themselves only if the order is pending seller confirmation. If buyer cancels, seller must be notified to repost the item. This will be part of the new "Order" tab - > Open orders page that is being created for 2.0. When clicked on Order number/Action button, the order details page have to show up with the above options. After item was cancelled due to some reasons - posting of corresponding items in the order - disappears so that Vendor needs to post it again with usual posting procedure so that it would be availabe on a marketplace again
65	As a pharmacy I want to be able to display details of each order I sold or I purchased : - Buyer name, address, DEA - Seller name, address, DEA - Ship Date - Ship method - "order number"; - "order date"; - "Name" (item name; NDC#) ; - "Strength / Packaging" (strength; packaging); - "Exp" (expiration month and year); - "Price / Unit (ea)" (price; price per unit); - "Qty" (quantity); - "MRX Fee" (sales only) - "Shipping $" - "Total" (ordered item's value - MRX Fee + shipping). List has a summary row with total product cost. This section is displayed when "View invoice" is clicked. Buyer and Seller Invoices will have applicable data fields.
66	As a pharmacy I want the system to prepare the invoice so that I can easily view it (online) and/or print it (pdf).
68	In 3.0, notification should be sent to the contacts who have signed up for that notification. In contact manager page, option to sign up (check box) for notification. By default, the contact should be signed up for email wishlist notification. In system notification is new to 3.0. It is a small number on top of the tab to indicate the number of action items remaining. (e.g. fb notification number)

Order Life-cycle

Order life-cycle flow chart





Order status dictionary

The list of possible statuses for an order:

Order Status	Action needed to reach this status	Occurence	Notification to	Notification Action (US 6 - Pharmacy/VM Wholesaler Menu - BR_Notifications)	Triggers - Financial
Pending seller confirmation (Mobile Buyer: Pending Seller)	• Once an item posted by the seller is sold or • When the seller has revised the order and buyer has accepted/changed the seller-revised order	All orders will have this status at least once and may have this infinitive number of times.	Seller	• Seller Posting Sold • Seller Reconfirm Order	N/A
Seller revised	When the seller marks one or more item/quantity in the order is not available.	Orders may or may not have this status during the order life-cycle.	Buyer	• Buyer Modified Order	N/A

Pending FedEx Pick-up (Mobile Buyer: Pending Pick-up)	When seller schedules FedEx pick-up in either of the below two scenarios • For non-revised orders, the seller confirms that the items and quantity mentioned in the order is available • For revised orders, the seller confirms that the items and quantity mentioned in buyer accepted/changed order is available	All orders will have one of the status (Pick-up/Drop-off) once unless the order is canceled before it reaches this stage in the life-cycle	Buyer	• Buyer Order Confirmation	Debits Buyer
Pending FedEx Drop-off (Mobile Buyer: Pending Drop-off)	When seller chooses FedEx drop-off in either of the below two scenarios • For non-revised orders, the seller confirms that the items and quantity mentioned in the order is available • For revised orders, the seller confirms that the items and quantity mentioned in buyer accepted/changed order is available	All orders will have one of the status (Pick-up/Drop-off) once unless the order is canceled before it reaches this stage in the life-cycle	Buyer	• Buyer Order Confirmation	Debits Buyer
In Transit	When Fedex has scanned (FedEx drop-off/pick-up)	All orders will have this status once unless the order is canceled before it reaches this stage in the life-cycle			N/A
Delivered - Pending buyer confirmation (Mobile Seller: Delivered)	Once the item has been delivered per Fedex tracking status	All orders will have this status once unless the order is canceled before it reaches this stage in the life-cycle	Buyer	• Buyer Verification of Order	N/A
Buyer Revised	When the buyer states that the items received is not as described.	Orders may or may not have this status during their life-cycle	• MatchRX BO user	• Notification on salesforce as a case	N/A
Complete	• When the buyer confirms receipt of the order in acceptable condition or • 1: 00 AM EST of 3rd business day after delivered date (Day 0) per Fedex tracking status (e.g. Delivered on 1st - status changes on 4th 01:00 AM)	All orders will have this status once unless the order is canceled before it reaches this stage in the life-cycle	Seller	• Seller Sale Complete	Credits Seller
Canceled	• If the seller cancels when the status is pending seller confirmation or • if the buyer cancels when the status is seller revised.	Orders may or may not have this status during their life-cycle	Seller / Buyer	• Buyer Canceled Modified Order • Seller Canceled Order	
Return	The BO user may change the status to Return when the buyer wants to return	Orders may or may not have this status during their life-cycle			
Exchange	The BO user may change the status to Return when the buyer wants to return	Orders may or may not have this status during their life-cycle			

Notifications

~~MRX-Notification_EMAILS_SMS_cb.xlsx~~

~~Updated on June 6~~

~~MRX-Notification_EMAILS_SMS_cb.xlsx~~

~~Updated on June 15 (Yellow highlights)~~

~~MRX-Notification_EMAILS_SMS_cb June 15.xlsx~~

~~Update on June 21 (Orange font - Row# 14)~~

~~MRX Notification_EMAILS_SMS_eb June 21.xlsx~~

Update on July 12

MRX Notification_EMAILS_SMS June 25.xlsx

Sample email Templates - Emails_All.pdf

Order Details Page

The order details page will vary based on section (US 29 - MRX 3.0 My Orders - My Orders) in which the order is found. In all statuses, if a BO user adds/edits/deletes an item in the order from Salesforce, it should be reflected in the website.

Sales in Progress - Action Required

Status = Pending Seller Confirmation

The order details page will have the following field.

Seller Confirmation: Confirm the availability of each item and quantity in the order by checking Available, Revise Qty/Pkg or Out of Stock in the "Confirmation Status" column.

Field Name	**Information**
Section 1	
Order Number	System Generated
Order Date	System Generated
Confirmation Status	Available Revise Qty/Pkg Out of Stock If packaging is full and quantity is 1, Revise Qty/Pkg option will be disabled. If the user selects Revise qty/pkg or Out of stock and if there is more quantity available in the marketplace for the same posting, the qty has to be changed to 0 and removed from marketplace.

Items in the order listed one below the other	The item details will have the following fields
	
	• Image
	• Drug Name
	• NDC
	• Manufacturer
	• Form
	• Lot #
	• Exp Date
	• WAC discount % (Discount % calculated when the order is submitted)
	• Strength
	• Package condition
	• Price
	• Price per unit
	• Qty (Value will be 1 if packaging is partial)
	    • If its a non-revised item, this field will display the qty placed in the original order. If it is a revised order, this field will display the qty accepted by Buyer.
	    • If user clicks "Revise Qty", this field is enabled for edit if it is a full pack. The options should be 1 , 2, and so on with maximum value equal to one less than Qty column. The seller will select the quantity available with the seller pharmacy. If it is partial pack, the qty will remain 1 and the field will not be enabled for edit. ~~The posting related to the item should not be changed in the DB~~ .
	    • If user clicks "Out of stock", the Qty should be changed to 0 (even for partial packaging). ~~The posting related to the item should not be changed in the DB.~~
	• Packaging
	    • If partial,
	        • If its a non-revised item, this field will display the partial qty placed in the original order. If it is a revised order, this field will display the partial qty accepted by Buyer.
	        • If user clicks "Revise Qty", this field is enabled for edit. It will be text field (numeric only) and the max value allowed will be one less than ordered partial qty. The seller will select the quantity available with the seller pharmacy. The posting related to the item should not be changed in the DB
	    • If full, Packaging value from Medispan should be displayed and it will remain read only.
	• Total
	    • If full pack - Price x Qty available
	    • If partial pack - (Price / partial qty ordered) x partial qty available
	
	The seller will not be able to convert a full pack to partial or vice versa. Similarly, the seller will not be able to change a non-sealed package to sealed and vice-versa.

Message	Per the MatchRX User Agreement, buyer attests that items are for a specific patient need or purchased during a declared public health emergency.
Section 2 - Option A - If quantity available is "Available" for all items in the order	
Shipping Method	Read only field. The field will be populated based on shipping option selecting while placing the order

<table>
<tr>
<td>Add Fedex insurance (with hyperlink to T&C of fedex insurance - http://www.fedex.com/cm/shippingguide/terms/#18)</td>
<td>Based on the item total, the system should display the fedex insurance fee ~~(using Fedex API)~~. The user should be given the option to opt in/opt out of FedEx insurance.

RE Updates.msg.

FedEX insurance fee is calculated as follows:

1. If order value <= $100, the FedEx insurance fee will be $0 and the check box will be checked and read only.
2. If order value is $101, the FedEx insurance fee will be $2 and the check box will be unchecked and select-able. The system should add $1.00 per $100 in order value, rounding up to the nearest $100. Maximum FedEx insurance fee will be $500.
3. When the confirmation status of any of the item is changed, the previous selection of the FedEx insurance fee check box is wiped out, becomes unchecked and select-able. The only exception to this rule is when the revised value is <= $100. If the revised value is <=100, the check box will be checked and read only.

E.g.

<table>
<tr><th>Order value</th><th>FedEx insurance fee</th></tr>
<tr><td>$100</td><td>$0</td></tr>
<tr><td>$200</td><td>$2</td></tr>
<tr><td>$1001</td><td>$11</td></tr>
<tr><td>$50,000</td><td>$500</td></tr>
<tr><td>$50,001</td><td>$500</td></tr>
</table>

"All shipments are insured up to $100 by FedEx. You may purchase additional FedEx insurance for the full item total. Maximum insurable value is $50,000."</td>
</tr>
<tr>
<td>Shipping Date</td>
<td>Today and Next business day (Fedex business day) should be shown as options.

If the order contain Refrigerated/Frozen item and

• current day is Thursday, the options will be Thursday and Monday.
• current day is Friday/Saturday/Sunday, the option will be Monday only.</td>
</tr>
<tr>
<td>Package will be ready for pickup at

informational message below the field "Allow up to x hours for pick up" where x is the pick up lead time from FedEx API</td>
<td>When shipping method = Ground

• If today is selected, the next dropdown should only provide the option to drop off at fedex location
• If next business day is selected, the dropdown should provide drop off at fedex location and pick up time slots based on Fedex API

When shipping method - 2 day/ Priority Overnight

• For both today and next business day selection, the dropdown should provide drop off at fedex location and pick up time slots based on Fedex API

FedEx API will be provide the pick up lead time (e.g. 3 hours). The system should assume that all pharmacies close at 6 PM local time. The dropdown should provide pick up options until 6 pm minus the pick up lead time (e.g. 6 PM minus 3 hours = till 3 PM). For example, if lead time is 3 hours and the current time at seller's mailing address is 1 PM, the drop down options will be 1:30 PM, 2:00 PM, 2:30 PM, 3:00 PM. If the lead time is 2 hours, the options will be 1:30 PM, 2:00 PM, 2:30 PM, 3:00 PM, 3:30 PM, 4:00 PM.</td>
</tr>
<tr>
<td colspan="2">Section 2 - Option B - If quantity available is "Out of Stock" for all items in the order</td>
</tr>
<tr>
<td>Message</td>
<td>This order will be canceled
The item(s) in this order is unavailable. You must click the Submit Cancellation button now to send a notification to the Buyer.
Once submitted, no further action is required.</td>
</tr>
<tr>
<td colspan="2">Section 2 - Option C - If quantity available is "Revised" for at least one items in the order or of it is "out of stock" for at least one item but not all items.</td>
</tr>
</table>

Message	**This order has been modified** Please verify remaining items. When done click the **Submit Revision** button to send a notification to the Buyer. Approved revisions will automatically appear in the My orders - Sales in Progress section as an order awaiting Seller Confirmation.
Section 3	
MatchMoney	Separate User Story
Section 4	
Item(s) total	Value of the order in $ without including shipping and MatchRX fees. This value will be updated if the "Qty available" field is changed.
Shipping charge	Shipping cost to be paid by the seller. Refer US 28 - MRX Cart & Checkout page - Shipping to calculate the shipping total. If the shipping method is ground, $2.50 should be added. This $2.5 should be added even if the seller is not paying for the shipping.
MatchRX fee	% of order value calculated based on Financial Group the member belongs to (US 18 - BO Manage Pharmacy Group - BR_Financial Group)
MatchMoney	Based on the MatchMoney section
Fedex Insurance	Display the insurance fee if the user opts in for Fedex insurance in Section 2
Credit total	Item total - Shipping charge - MRX fee + MatchMoney - Fedex insurance (if opted in)
Submit Order / Submit Cancellation / Submit Revision	If quantity available is "Out of Stock" for all items in the order, the button text will be **Subm it Cancellation.** If quantity available is "Revised" for at least one items in the order or of it is "out of stock" for at least one item but not all items, the button text will be **Submit Revision** If quantity available is "Available" for all items in the order, the button text will be **Submit Order.** The submit order/revision/cancelation button should be disabled. Only when one of the Available/Revise/OoS is selected and When Available is selected, ship date and package ready for pick up at fields is selected, the submit button should be enabled.
Back	

Once the user clicks one of the "submit" button, the following scenarios are possible:

Order canceled

If quantity available is "Not available" for all items in the order, the system has to set the status to "Canceled" and display the below message Order Cancellation Notice

Your order has been canceled

You may reach us at customerservice@matchrx.com
or call 1-877-590-0808.

Order revised

If quantity available is not equal to quantity ordered at least one of the item in the order, the system has to set the status to "Seller Revised" and display the below message

Order Revision Notice
You have indicated one or more of the items in the order is no longer available.* An account representative will contact the buyer on your behalf and you will receive
an e-mail informing you of the Buyer's decision to purchase or cancel the remaining items in the order. If the buyer accepts the revision, the order will automatically appear in the My orders - Sales in Progress section as an order awaiting Seller Confirmation.

You may reach us at customerservice@matchrx.com
or call 1-877-590-0808.

Full order confirmed

1. If the quantity available is equal to quantity ordered for all the items in the order, based on the "Schedule Pick Up/Drop Off" field selection , the system should change the status as follows
    a. Fedex Pick-up - status changes to Pending FedEx pick-up
    b. Fedex Drop-off - status changes to Pending FedEx drop-off
2. The system should provide a button to save and print the shipping documents (shipping label & packing slip). Instructions for seller: Include the signed Packing Checklist with the order.
3. Display the message "Upon Fedex pickup/drop-off of any package, make sure FedEx scans your package at that time."
4. ASD DC Ground Packing.pdf (The content in this PDF should be shown as message on the webpage.)

Shipping label & packing slip

The following fields will be available in the shipping label & packing slip

matchrx_shipdocs_order_8771371.pdf

FedEx failure

Scenario 1:

We should display the seller confirmation page but the 2nd section – Shipping should be replaced with the below message and "submit order" button should be disabled. If the order is revised or marked as out of stock, the button would have changed to "submit revision" or "submit cancelation" which should be enabled.

"FedEx is experiencing technical difficulties at this time and they are working to resolve the issue. Please try again shortly"

Scenario 2:

If the FedEx API fails after "submit order" button is clicked and FedEx fails to provide the shipping label, we should display the above message. The system should not change the order status to "Seller confirmed" .The order status should be changed only when Fedex provides the shipping label. Also the financial transaction should be generated only after the change in status to "Seller confirmed".

Sales in Progress - Open Orders

This section will contain orders sold by the pharmacy and with any status other than Pending seller confirmation / complete / canceled.

Status - Seller Revised

Field Name	Information
Section 1	
Order Number	System Generated
Order Date	System Generated

<table>
<tr><td>Items in the order listed one below the other</td><td>The item details will have the following fields

Image
Drug Name
NDC
Manufacturer
Lot #
Exp Date
WAC discount % (Discount % calculated when the order is submitted)
Strength
Package condition
Price
Price per unit
Qty (Value will be 1 if packaging is partial)

If its a non-revised item, this field will display the qty placed in the original order.
If it is a revised item, this field will display the original qty with a strike through and the revised qty.
If the item is marked out of stock, this field will display the original qty with a strike through and the new quantity as 0. (even for partial packaging)
~~If the revision for this item is rejected by the buyer (Acceptance Status = Reject), the confirmation status will be marked "Rejected" and qty will be marked 0.~~

Packaging

If partial,

If its a non-revised item, this field will display the partial qty placed in the original order.
If it is a revised item, this field will display the partial qty placed in the original order with a strike through and the revised qty
If the item is marked out of stock, this field will display the original qty
~~If the revision for this item is rejected by the buyer (Acceptance Status = Reject), the confirmation status will be marked "Rejected" and qty will be marked with the last revised value.~~

If full, Packaging value from Medispan should be displayed and it will remain read only.

Total

If full pack - Price x Qty available
If partial pack - (Price / partial qty ordered) x partial qty available

</td></tr>
<tr><td>Message</td><td>Per the MatchRX User Agreement, buyer attests that items are for a
specific patient need or purchased during a declared public health emergency.</td></tr>
<tr><td colspan="2">Section 2</td></tr>
<tr><td>Shipping Method</td><td>Read only field.</td></tr>
<tr><td>Message</td><td>This order has been modified
The order is awaiting buyer's acceptance. Once the buyer approves the revision, the order will automatically appear in the My orders - Sales in Progress section as an order awaiting Seller Confirmation</td></tr>
<tr><td colspan="2">Section 3</td></tr>
<tr><td>Item(s) total</td><td>Value of the order in $ without including shipping and MatchRX fees.</td></tr>
<tr><td>Shipping total</td><td>Shipping cost to be paid by the seller.</td></tr>
<tr><td>MatchRX fee</td><td>% of order value calculated based on Financial Group the member belongs to (US 18 - BO Manage Pharmacy Group - BR_Financial Group)</td></tr>
<tr><td>Credit total</td><td></td></tr>
<tr><td>Cancel</td><td>A Seller can cancel the order using this button</td></tr>
<tr><td>Back</td><td></td></tr>
</table>

Status = Pending FedEx / In-transit / Delivered - Pending Buyer confirmation / **Buyer Revised / Return / Exchange**

When order status = Buyer Revised / Return / Exchange , any revision made through back office will not be updated in this page. For example:

1. Buyer order 5 items
2. Seller revised to 3 items and buyer accepts
3. Order status changes to Delivered - Pending buyer confirmation
4. Buyer calls back office and mentions that he wants to return 1 and keep 2 and seller agrees.
5. BO user will make the revision on Salesforce and the set the order status to "Return"
6. When the seller views this page, he/she will see all three items as it was when shipping label was generated.
7. When the order status is changed to completed by the BO user, the order details page will display only the 2 items retained by the buyer.

The returned item will not be shown.

Field Name	Information
Section 1	
Order Number	System Generated
Order Date	System Generated

Items in the order listed one below the other	The item details will have the following fields
	• Image
	• Drug Name
	• NDC
	• Manufacturer
	• Lot #
	• Exp Date
	• WAC discount % (Discount % calculated when the order is submitted)
	• Strength
	• Package condition
	• Price
	• Price per unit
	• Qty (Value will be 1 if packaging is partial)
	  ◦ If its a non-revised item, this field will display the qty placed in the original order.
	  ◦ If it is a revised item, this field will display the revised qty.
	  ◦ If the item is marked out of stock or rejected, this item will not display
	• Packaging
	  ◦ If partial,
	    ▪ If status = Pending FedEx/In-transit/Delivered - Pending Buyer confirmation
	      ▪ If its a non-revised item, this field will display the qty placed in the original order.
	      ▪ If it is a revised item, this field will display the revised qty.
	      ▪ If the item is marked out of stock or rejected, this item will not display
	  ◦ If full, Packaging value from Medispan should be displayed and it will remain read only.
	• Total
	  ◦ If full pack - Price x Qty available
	  ◦ If partial pack - (Price / partial qty ordered) x partial qty available

Message	Per the MatchRX User Agreement, buyer attests that items are for a specific patient need or purchased during a declared public health emergency.
Section 2	
Shipping Method	Read only field.
Shipping Date	This will be read only field based on seller selection during Seller confirmation stage
Package will be ready for pickup at informational message below the field "Allow up to x hours for pick up" where x is the pick up lead time from FedEx API	This will be read only field based on seller selection during Seller confirmation stage
Tracking number	This will be read only field based on seller selection during Seller confirmation stage
Buyer Name & Address	This will be read only field based on seller selection during Seller confirmation stage
Print Shipping label & Packing slip	This will be button for user to download shipping label and packing slip that was generated at the end of the Seller confirmation process.
Section 3	
Item(s) total	Value of the order in $ without including shipping and MatchRX fees.
Shipping total	Shipping cost to be paid by the seller.

MatchRX fee	% of order value calculated based on Financial Group the member belongs to (US 18 - BO Manage Pharmacy Group - BR_Financial Group)
MatchMoney	If Order Status = Seller Revised, this field will be 0. For other statuses, display the amount with which the order was confirmed during the seller confirmation process.
Fedex Insurance	If Order Status = Seller Revised, this field will be 0. For other statuses, display the amount with which the order was confirmed during the seller confirmation process.
Credit total	
Back	

Purchases in Progress - Action Required

Status = Seller Revised

<table>
<tr><th>Field Name</th><th>Information</th></tr>
<tr><td colspan="2" align="center">Section 1</td></tr>
<tr><td>Order Number</td><td>System Generated</td></tr>
<tr><td>Order Date</td><td>System Generated</td></tr>
<tr><td>Acceptance Status (for each item)</td><td>Accept / Reject</td></tr>
<tr><td>Items in the order listed one below the other</td><td>The item details will have the following fields

Image
Drug Name
NDC
Manufacturer
Lot #
Exp Date
WAC discount % (Discount % calculated when the order is submitted)
Strength
Package condition
Price
Price per unit
Qty (Value will be 1 if packaging is partial)

If its a non-revised item, this field will display the qty placed in the original order.
If it is a revised item, this field will display the original qty with a strike through and the revised qty.
If the item is marked out of stock, this field will display the original qty with a strike through and the new quantity as 0 (even for partial packaging)

Packaging

If partial,

If its a non-revised item, this field will display the partial qty placed in the original order.
If it is a revised item, this field will display the partial qty placed in the original order with a strike through and the revised qty
If the item is marked out of stock, this field will display the original qty.

If full, Packaging value from Medispan should be displayed and it will remain read only.

Total

If full pack - Price x Qty available
If partial pack - (Price / partial qty ordered) x partial qty available

</td></tr>
<tr><td>Message</td><td>Per the MatchRX User Agreement, buyer attests that items are for a
specific patient need or purchased during a declared public health emergency.</td></tr>
<tr><td colspan="2" align="center">Section 2</td></tr>
</table>

Shipping Method	The buyer should be given the option to choose the shipping method, if one or both of the following happens: • If the previous version for the order before seller revision had refrigerated item and all refrigerated items in the order were marked as Out of stock by the seller • If the buyer marks all refrigerated items in the order as rejected (even if the item is not revised by the seller) The cost of shipping through Fedex API should be displayed. If the seller has agreed to pay for an item during the posting process and if order qualifies, the cost of relevant shipping method will be charged to the seller. If not, buyer pays for the shipping. Free shipping promo and two day shipping at ground rate will not be applicable while calculating the shipping cost. If the revised order contains an refrigerated item or if the previous version for the order before seller revision did not have any refrigerated item then this will be a Read only field. The field will be populated based on shipping option selecting while placing the order.
Section 3	
Item(s) total	Value of the order in $ without including shipping.
Shipping charges	Shipping cost to be paid by the buyer. Refer US 28 - MRX Cart & Checkout page - Shipping to calculate the shipping total.
Debit total	Item total - Shipping total
Back	
Submit / Cancel Order	If user marks "Reject" for all items in the order, the button text will be**Cancel Order.** In all other scenarios, the button text will be**Submit Order.**

Once the user clicks "Submit" button, the following scenarios are possible:

Cancel Order

If the button name is "Cancel Order", the system has to set the status to "Canceled" and display the below message

Order Cancellation Notice

Your order has been canceled

You may reach us at customerservice@matchrx.com
or call 1-877-590-0808.

Submit Order

If the button name is "Submit Order", the system has to set the status to "Pending Seller confirmation" and display the below message

"The seller has been notified and will process the order."

Status = Delivered - Pending Buyer confirmation

Display the below message at the top of the page

Buyer Confirmation: Approve the item(s) received match the line item details in the order by checking Yes or No in the Approved column.

Field Name	Information
Section 1	
Order Number	System Generated
Order Date	System Generated
Approved (for each item) Approve all checkbox to select "Yes" for all items	Yes/No (Default selection is None) If No is selected, a text box is displayed with the message inside the text box "Describe the issue in detail i.e. I received NDC, Lot #, Exp. date or Qty received was xx".

<table>
<tr><td>Items in the order listed one below the other</td><td>The item details will have the following fields

Image
Drug Name
NDC
Manufacturer
Lot #
Exp Date
WAC discount % (Discount % calculated when the order is submitted)
Strength
Package condition
Price
Price per unit
Qty (Value will be 1 if packaging is partial)

If its a non-revised item, this field will display the qty placed in the original order.
If it is a revised item, this field will display the revised qty.
If the item is marked out of stock or rejected, the item will not be displayed

Packaging

If partial,

If its a non-revised item, this field will display the partial qty placed in the original order.
If it is a revised item, this field will display the revised qty
If the item is marked out of stock or rejected, the item will not be displayed.

If full, Packaging value from Medispan should be displayed and it will remain read only.

Total

If full pack - Price x Qty available
If partial pack - (Price / partial qty ordered) x partial qty available

</td></tr>
<tr><td>Message</td><td>Per the MatchRX User Agreement, buyer attests that items are for a
specific patient need or purchased during a declared public health emergency.</td></tr>
<tr><td colspan="2">Section 2 - Option A - If Approved column is Yes for all items</td></tr>
<tr><td>Shipping Method</td><td>Read only</td></tr>
<tr><td>Tracking Number</td><td>Hyperlinked to FedEx tracking</td></tr>
<tr><td>Seller Rating</td><td>Rating stars will be increment of 1 (min 1, max 5)
Comments section will not be displayed by default. It will appear only when the user selects a rating 4 or below.</td></tr>
<tr><td colspan="2">Section 2 - Option B - If Approved column is No for at least one item</td></tr>
<tr><td>Shipping method</td><td></td></tr>
<tr><td>Tracking number</td><td></td></tr>
<tr><td>Reason for order issue</td><td>~~Drop down~~ Check box with options (Incorrect quantity, Incorrect item(s), Packaging issue, Item(s) damaged, Other) - Multi selection is possible.</td></tr>
<tr><td colspan="2">Section 3 - Option A - If Approved column is Yes for all items</td></tr>
<tr><td>Item(s) total</td><td></td></tr>
<tr><td>Shipping charges</td><td></td></tr>
<tr><td>Debit total (with ACH date)</td><td></td></tr>
<tr><td>Back</td><td></td></tr>
<tr><td>Submit</td><td>Button</td></tr>
<tr><td colspan="2">Section 3 - Option B - If Approved column is No for at least one item</td></tr>
<tr><td>Submit Case</td><td>Button</td></tr>
</table>

Completed Order:

If the buyer marks "Yes" for all items, the order status is changed to "Completed". The financial transaction for seller and buyer (if any refund/charge needs to be done) is generated for MMS to use.

Display the below message:

"Your order is complete."

Continue shopping button

Buyer Revised:

If the buyer marks "No" to one or more items, the order status is changed to "Buyer Revised". The financial transactions are not generated. A case should be generated in Salesforce with Order Number, Buyer Account, Buyer Contact (user who submitted the case) Seller account (all three hyperlinked), Reason for order issue and the NDCs marked as "Yes/No" with text box.

Display the below message in the webpage.

"Your case has been submitted. A customer service representative will contact you for further review. Please reference the order number '{order number} when contacting customer service at 877 590 0808."

Continue shopping button.

Purchases in Progress - Open Orders

This section will contain orders with statuses other than Seller Revised / completed / canceled.

Status = Pending Seller confirmation

<table>
<tr><th>Field Name</th><th>Information</th></tr>
<tr><td colspan="2" align="center">Section 1</td></tr>
<tr><td>Order Number</td><td>System Generated</td></tr>
<tr><td>Order Date</td><td>System Generated</td></tr>
<tr><td>Items in the order listed one below the other</td><td>The item details will have the following fields
Image
Drug Name
NDC
Manufacturer
Lot #
Exp Date
WAC discount % (Discount % calculated when the order is submitted)
Strength
Package condition
Price
Price per unit
Qty (Value will be 1 if packaging is partial)
If its a non-revised item, this field will display the qty placed in the original order. If it is a revised order, this field will display the qty accepted by Buyer.
If the item was marked out of stock or rejected, then the item will not be displayed.
Packaging
If partial,
If its a non-revised item, this field will display the qty placed in the original order. If it is a revised order, this field will display the qty accepted by Buyer.
If the item was marked out of stock or rejected, then the item will not be displayed.
If full, Packaging value from Medispan should be displayed
Total
If full pack - Price x Qty available
If partial pack - (Price / partial qty ordered) x partial qty available</td></tr>
<tr><td>Message</td><td>Per the MatchRX User Agreement, buyer attests that items are for a
specific patient need or purchased during a declared public health emergency.</td></tr>
<tr><td colspan="2" align="center">Section 2</td></tr>
<tr><td>Shipping Method</td><td>Read only field. The field will be populated based on shipping option selecting while placing the order</td></tr>
<tr><td colspan="2" align="center">Section 3</td></tr>
<tr><td>Item(s) total</td><td>Value of the order in $ without including shipping.</td></tr>
<tr><td>Shipping charges</td><td>Shipping cost to be paid by the buyer. Refer US 28 - MRX Cart & Checkout page - Shipping to calculate the shipping total.</td></tr>
</table>

Debit total	Item total + Shipping total
Back	
Cancel Order	A buyer can cancel the order using this button**.**

Cancel Order

If the button name is "Cancel Order", the system has to set the status to "Canceled" and display the below message

Order Cancellation Notice

Your order has been canceled

You may reach us at customerservice@matchrx.com
or call 1-877-590-0808.

Status = Pending fedex Pickup / Pending Fedex Drop-off / In Transit / Buyer revised / Return / Exchange

After the order reaches the status - Delivered pending buyer confirmation, any revision made through back office or through website will not be updated in this page. For example:

1. Buyer order 5 items
2. Seller revised to 3 items and buyer accepts
3. Order status changes to Delivered - Pending buyer confirmation
4. Buyer calls back office and mentions that he wants to return 1 and keep 2 and seller agrees.
5. BO user will make the revision on Salesforce and the set the order status to "Return"
6. When the buyer views this page, he/she will see all three items as it was when shipping label was generated.
7. When the order status is changed to completed by the BO user, the order details page will display only the 2 items retained by the buyer. The returned item will not be shown.

Field Name	Information
Section 1	
Order Number	System Generated
Order Date	System Generated

Items in the order listed one below the other	The item details will have the following fields
	• Image
	• Drug Name
	• NDC
	• Manufacturer
	• Lot #
	• Exp Date
	• WAC discount % (Discount % calculated when the order is submitted)
	• Strength
	• Package condition
	• Price
	• Price per unit
	• Qty (Value will be 1 if packaging is partial)
	  ◦ If status = Pending FedEx/In-transit/Delivered - Pending Buyer confirmation
	    ▪ If its a non-revised item, this field will display the qty placed in the original order.
	    ▪ If it is a revised item, this field will display the revised qty.
	    ▪ If the item is marked out of stock or rejected, this item will not display
	• Packaging
	  ◦ If partial,
	    ▪ If status = Pending FedEx/In-transit/Delivered - Pending Buyer confirmation
	      ▪ If its a non-revised item, this field will display the qty placed in the original order.
	      ▪ If it is a revised item, this field will display the revised qty.
	      ▪ If the item is marked out of stock or rejected, this item will not display
	  ◦ If full, Packaging value from Medispan should be displayed and it will remain read only.
	• Total
	  ◦ If full pack - Price x Qty available
	  ◦ If partial pack - (Price / partial qty ordered) x partial qty available

Message	Per the MatchRX User Agreement, buyer attests that items are for a specific patient need or purchased during a declared public health emergency.
Section 2	
Shipping Method	Read only field.
Shipping Date	Based on the Fedex tracking number generation date (Blank if Order status = Pending seller confirmation)
Expected Delivery Date	Based on Fedex API
Tracking number	Based on Fedex API
Section 3	
Item(s) total	Value of the order in $ without including shipping.
Shipping charges	Shipping cost to be paid by the buyer. ReferUS 28 - MRX Cart & Checkout page - Shippingto calculate the shipping total.
Debit total (with ACH date)	Item total + Shipping total
Back	

History

This page will list all the non-active orders brought or sold by a particular member (even items listed by other users of the same pharmacy). Non-active orders are orders with status complete or canceled n the Order dictionary. The orders will be grouped into two sections, namely:

Sell History

This section explains the details of orders sold by the pharmacy and has the status complete / canceled.

Field Name	Information
Section 1	
Order Number	System Generated
Order Date	System Generated

<table>
<tr><td>Items in the order listed one below the other</td><td>The item details will have the following fields

Image
Drug Name
NDC
Manufacturer
Lot #
Exp Date
WAC discount % (Discount % calculated when the order is submitted)
Strength
Package condition
Price
Price per unit
Qty (Value will be 1 if packaging is partial)

If its a non-revised item, this field will display the qty placed in the original order.
If it is a revised item, this field will display the revised qty.
If the item is marked out of stock or rejected, the item will not be displayed
For canceled orders, the qty will be 0 for all items

Packaging

If partial,

If its a non-revised item, this field will display the partial qty placed in the original order.
If it is a revised item, this field will display the revised qty
If the item is marked out of stock or rejected, the item will not be displayed

If full, Packaging value from Medispan should be displayed.

Total

If full pack - Price x Qty available
If partial pack - (Price / partial qty ordered) x partial qty available

</td></tr>
<tr><td colspan="2">Section 2 - Option A - Order Status = Completed & Order status = canceled after seller confirmation</td></tr>
<tr><td>Ship Method</td><td>Based on actual ship method</td></tr>
<tr><td>Tracking Number</td><td></td></tr>
<tr><td>Shipped Date</td><td>Date on which tracking number was generated.</td></tr>
<tr><td>Delivery Date</td><td>Based on Fedex delivery status</td></tr>
<tr><td>Bank Name</td><td></td></tr>
<tr><td>Account Credited</td><td>Account number masked with last 4 digits visible</td></tr>
<tr><td>Payment Date</td><td>Same as ACH date found in Salesforce (US 36 - BO Financial Transaction). This is the date provided my MMS application</td></tr>
<tr><td>Buyer Name & Address</td><td>Shipping address & State license #</td></tr>
<tr><td>Message (only for status = canceled)</td><td>Your order has been canceled</td></tr>
<tr><td colspan="2">Section 2 - Option B - Order Status = Canceled before seller confirmation</td></tr>
<tr><td>Message</td><td>Your order has been canceled</td></tr>
<tr><td colspan="2">Section 3 - Displayed for Option A only</td></tr>
<tr><td>Item(s) total</td><td>Value of the order in $ without including shipping and MatchRX fees.</td></tr>
<tr><td>Shipping charge</td><td>Shipping cost paid by the seller.</td></tr>
<tr><td>MatchRX fee</td><td></td></tr>
<tr><td>MatchMoney</td><td></td></tr>
<tr><td>Fedex Insurance</td><td></td></tr>
<tr><td>Credit total</td><td></td></tr>
<tr><td>Download Invoice</td><td>Button to download the above information as an invoice. Sample invoice (MRX-Orders-Sell-V2.pdf)</td></tr>
<tr><td>Message</td><td>Per the MatchRX User Agreement, buyer attests that items are for a
specific patient need or purchased during a declared public health emergency.</td></tr>
<tr><td>Back</td><td></td></tr>
</table>

Buy History

This section explains the details of orders bought by the pharmacy and has the status complete / canceled.

Field Name	Information
Section 1	
Order Number	System Generated
Order Date	System Generated

Items in the order listed one below the other	The item details will have the following fields
	- Image
	- Drug Name
	- NDC (Hyperlinked. When user clicks, the system should search the NDC in the Buy Page)
	- Manufacturer
	- Lot #
	- Exp Date
	- WAC discount % (Discount % calculated when the order is submitted)
	- Strength
	- Package condition
	- Price
	- Price per unit
	- Qty (Value will be 1 if packaging is partial)
	  - If its a non-revised item, this field will display the qty placed in the original order.
	  - If it is a revised item, this field will display the revised qty.
	  - If the item is marked out of stock or rejected, the item will not be displayed
	  - For canceled orders, the qty will be 0 for all items
	- Packaging
	  - If full, Packaging value from Medispan should be displayed.
	  - If partial,
	    - If its a non-revised item, this field will display the partial qty placed in the original order.
	    - If it is a revised item, this field will display the revised qty
	    - If the item is marked out of stock or rejected, the item will not be displayed
	- Total
	  - If full pack - Price x Qty available
	  - If partial pack - (Price / partial qty ordered) x partial qty available

Section 2 - Option A - Order Status = Completed & Canceled after seller confirmation	
Ship Method	Based on actual ship method
Tracking number	
Shipped Date	Date on which tracking number was generated.
Delivery Date	Based on Fedex delivery status
Bank Name	
Account Debited	Account number masked with last 4 digits visible
Payment Date	Same as ACH date found in Salesforce (US 36 - BO Financial Transaction). This is the date provided my MMS application
Seller Name & Address	Shipping address & State license #
Message (only for status = canceled)	Your order has been canceled
Section 2 - Option B - Order Status = Canceled before seller confirmation	
Message	Your order has been canceled
Section 3 - Displayed for Option A only	
Item(s) total	
Shipping charge	

Debit total	
Download Invoice	Button to download the above information as an invoice. Sample invoice (MRX-Orders-Buy-V2.pdf)
Message	Per the MatchRX User Agreement, buyer attests that items are for a specific patient need or purchased during a declared public health emergency.
Back	

US 31 - BO List of all Orders in MRX 3.0

WBS #

Key	Summary	Updated	Due	Assignee	Status	Sprint
MHX-1035	CLONE - WBS 197: BO Order Actions to be made by BO user for order in a life cycle (order edit)	Apr 04, 2018 10:29		Swapna.Patnaikuni	DEVELOPMENT	Sprint 8
MHX-1033	CLONE - WBS 195: BO - Modify order status	Apr 06, 2018 12:46		Swapna.Patnaikuni	DEVELOPMENT	Sprint 8
MHX-1009	C006 - Salesforce - Rescheduling a pick up-WBS 196	Aug 22, 2018 11:21		Swapna.Patnaikuni	OPEN	Sprint 15
MHX-182	WBS 201: BO - 3.0 Orders view as FedEx shippings view	Mar 19, 2018 07:47		Swapna.Patnaikuni	IN QA	Sprint 7
MHX-181	WBS 198: BO - 3.0 Order Actions to be made by BO user for order in a lifecycle (NDC line item edit)	Mar 19, 2018 07:52		Swapna.Patnaikuni	IN QA	Sprint 7
MHX-159	WBS 197: BO Order Actions to be made by BO user for order in a life cycle (order edit)	Mar 20, 2018 08:19		Swapna.Patnaikuni	DEVELOPMENT	Sprint 7
MHX-157	WBS 195: BO - Modify order status	Mar 20, 2018 08:17		Swapna.Patnaikuni	DEVELOPMENT	Sprint 7
MHX-156	WBS 194: BO - Order details from 3.0 (order list)	Mar 19, 2018 07:52		Swapna.Patnaikuni	IN QA	Sprint 7
MHX-155	WBS 192: BO - List all orders from 3.0[List,Filtering and Sorting]	Mar 07, 2018 07:49		Swapna.Patnaikuni	IN STAGING	Sprint 6
MHX-154	WBS 193: BO - List all orders from 3.0[Sort,Export,Print]	Mar 07, 2018 07:50		Swapna.Patnaikuni	IN STAGING	Sprint 6
MHX-153	WBS 191: BO - List all orders from 3.0 which are in a life cycle	Mar 07, 2018 07:49		Swapna.Patnaikuni	IN STAGING	Sprint 6

11 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a back office user of MatchRx, I want the ability to view all orders by all pharmacies so that I can know the details of the orders.

End Objective:	To provide a system for the back office users to view by all pharmacies' orders and its details
User/Actor:	Back office users of MatchRX
Application:	Salesforce
Trigger:	
Related User Story:	

Related WBS Description:

191	I want to view all orders as a list with columns: - Order #; Seller & Buyer stated - Items inside the order (quantity) - Order Status; - Revised; (yes/no) - Seller Reconfirm; trigger to confirm on behalf of seller - Buyer Cancelled; trigger to cancel on behalf of buyer - Date; - Buyer (association); - Buyer State; - Seller (association); - Seller State; - Seller AR; - Product Cost (money); - Fee Seller (money); - Ship Buyer (money); - Ship Seller (money); - Total Ship (money); - Total Buyer (money); - Total Seller (money); - Ship Method (FedEx Ground / FedEx 2 day / FedEx priority overnight); - Tracking; - Last Ship Status; - Ship Status Time.
192	I want predefined list views with relevant list items filtering, list columns & list sorting for each stage of transaction: - Pending seller confirmation; - Pending buyer confirmation; - Seller revised; - Buyer revised; - In transit (Pending delivery); - Complete; - Cancelled; - Return; - Exchange; - Pending seller alerts; - Pending pickup alerts; - Pending buyer alerts; - Pending express orders; - FedEx Delay.
193	List actions: - sort the list by all columns - mange view of the list (number of records per page, sorting, navigation); - export the list to CSV/XLS file; - print the list.

194	I want to view details of the order with list of the ordered items in the view. -Edit order (view number of line items and item details); - Order #; - Order Status; - Revised; (yes/no) - Seller Reconfirm; trigger to confirm on behalf of seller - Buyer Cancelled; trigger to cancel on behalf of buyer - Date; - Buyer (association); - Buyer State; - Seller (association); - Seller State; - Seller AR; - Product Cost (money); - Fee Seller (money); - Ship Buyer (money); - Ship Seller (money); - Total Ship (money); - Total Buyer (money); - Total Seller (money); - Ship Method (FedEx Ground / FedEx 2 day / FedEx priority overnight); - Tracking; - Last Ship Status; - Ship Status Time.
195	BO user to assist /modify order lifecycle: - Change Shipping paid by (Buyer pays / Seller pays / Seller pays $200 or more); - Set as "confirmed by seller" - Set as "Revised by seller + details" - Set as "confirmed after revision from Buyer"
197	BO user to assist /modify order lifecycle: - A member will be able to submit a ticket (CRM form in the website) for return/exchange. - This ticket will be assigned to a BO user who will contact the seller/buyer. - Based on the issue, BO user will complete or reassign the ticket. - BO user will manually access and complete the transaction - set as return or exchange if needed - Notes.
198	BO user to assist/modify order details per NDC line item: - Order #; - Item ID; -DSCSA [SPN, Declared public health]; - Lot # [integer]; - Expiration date [date]; - Pack Size [decimal]; - Pack Qty [decimal]; - Pack Price [decimal] (Pack size x Pack Qty) - AAWP Disc [decimal]; - WAC Disc [decimal]; - Seller Status; - Buyer Status.

201	As BO user, I want to see all non delivered express seller confirmed orders as a list with columns: - Order #; - Order date; - Seller confirmed (date); - Tracking #; - Ship method; - last ship status; - Ship status date; - DEA; - Member; - Oder status. I want predefined list views with relevant list items filtering, list columns & list sorting for each stage of delivery: - All; - FedEx delayed; - Delivery exceptions. I want to: - search the list; - mange view of the list (number of records per page, sorting, navigation);

Business Rules

BR_Orders Basic Search

The Back office user should be able to search for orders using the Global search

BR_List of Orders Page

The default view, predefined filters, order details fields and automatic task creation are mentioned in the attached excel file

~~US_31_-_Field_&_Access_Grid_20MAR2018.xlsx~~

~~US 31 - Field_&_Access_Grid_07AUG2018.xlsx - Updated on Aug 7 - Changes are highlighted in green.~~

Updated on Aug 28

US 31 - Field_&_Access_Grid_14AUG2018.xlsx - Updates in orange highlighted

Below requirement is removed.

~~During revision, when the BO user sets the status as Return/Exchange/Buyer Revised, salesforce should update only the status and not the values in MySQL DB. The item and order details on the webpage will continue to show the values available in MySQL DB. When the BO user sets the status as anything other than Return/Exchange/Buyer Revised , Salesforce should update MySQL and webpage should show the updated values~~

US 32 - Mobile Checkout page

WBS #	Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
	MHX-140	WBS 148: Mobile Order[Display Checkout option to processing]	Mar 07, 2018 07:49		Maguesh Balakrishnan	IN STAGING	Unresolved	Sprint 6

1 issue

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered active user of MRX 3.0 mobile app, I want a shopping cart icon so that I can know the quantity of items in my cart and a checkout page so that I can review and place the order.

End Objective:	To provide shopping cart icon and checkout page
User/Actor:	Registered Primary and Secondary user of MRX 3.0 mobile app
Program Type:	Mobile application
Trigger:	Clicking on the shopping cart icon on the header should open the checkout page
Related User Story:	
Related WBS #:	148

Related WBS description:

148	As a buyer I want a "checkout" button to start processing my shopping cart towards an order. As a buyer I want to see full shopping cart details: - list of items in the current order (columns: Wishlist; Name; Item info; Strength / Packaging; Exp; % of WAC; Price / Unit (ea); Qty; Total): list of items items added to shopping cart - vendor (grouped per vendor inside the cart view) e.g. Two Suborder Vendor 1 - Ground Shipping Item A Vendor 2 - 2 day shipping Item C - total value of the cart; - checkout button. - option to remove items from cart - option to change item quantity - Change shipping method -- "Change reason for purchase" button per listitem [allows to change the value of choice]; - button "Shop more" [go back to shopping]; - button "Complete order" [finalizes the order & displays order confirmation (order number and total debit value)].

Business Rules

Shopping cart

The shopping cart icon should be available on the header on all pages as long as the user remains logged in. The shopping cart should always display the quantity (not the number of unique NDCs) currently in the cart.

The shopping cart will be specific and unique to the user of the pharmacy. If user 1 of Pharmacy A adds an item to the cart, another user 2 of same pharmacy A will not have that item in his/her cart.

~~Once an item has been added to the cart, the quantity ordered will be reserved for the particular user till the user removes the item from the cart or 12 hours from the time it was added, whichever is earlier.~~ Once an item has been added to the cart, the quantity added will NOT be reserved for the particular user. It will be available for everyone else in the buy marketplace to purchase. When the user clicks on "Submit Order" in the checkout page, the system has to check the quantity requested in the order and quantity available.If requested quantity is not available, the order should not proceed and the following message should be displayed "Item(s) in your cart have changed/removed. Please review and submit order again". The checkout page should be updated with the latest quantity available. If a particular item has no quantity available, the item has to be removed from the checkout page. If all items are removed from the checkout page, display the message "The seller(s) has informed us that the item(s) is no longer available".

When the user clicks the shopping cart icon, the app should redirect the user to check out page . If the user hasn't added any item to the cart, the checkout will be empty with the message "Your shopping cart is empty". ~~The page will also have "Continue Shopping" button to redirect the user to buy page.~~

Checkout Page

When the user clicks the shopping cart icon, the app should load the checkout page with the following information. Items sold by the same seller is grouped as one order.

Order Information Sections

- Seller A: (Hyperlink - The user should be taken to Buy marketplace and shown Seller A's other items)
    1. Item #1
        a. Image
        b. Drug Name
        c. NDC
        d. Manufacturer Name
        e. Quantity with ability to change (if full) / Packaging (if partial)
        f. "Remove from cart" button
        g. Drug Total (Qty ordered x price)
    2. Items #2
        a. Image
        b. Drug Name
        c. NDC
        d. Manufacturer Name
        e. Quantity with ability to change (if full) / Packaging (if partial)
        f. "Remove from cart" button
        g. Drug Total (Qty ordered x price)
    3. Item Total (Sum of Drug total of item #1 and item #2)
    4. Shipping
        a. Shipping method (Ground/Two-day/Priority Overnight) with fee and estimate delivery date
    5. Seller Total (sum of drug total and shipping fee)
- Seller B: ((Hyperlink - The user should be taken to Buy marketplace and shown Seller B's other items)
    1. Item #1
        a. Image
        b. Drug Name
        c. NDC
        d. Manufacturer Name
        e. Quantity with ability to change (if full) / Packaging (if partial)
        f. "Remove from cart" button
        g. Drug Total (Qty ordered x price)
    2. Items #2
        a. Image
        b. Drug Name
        c. NDC
        d. Manufacturer Name
        e. Quantity with ability to change (if full) / Packaging (if partial)
        f. "Remove from cart" button
        g. Drug Total (Qty ordered x price)
    3. Item Total (Sum of Drug total of item #1 and item #2)
    4. Shipping
        a. Shipping method (Ground/Two-day/Priority Overnight) with fee and estimate delivery date
    5. Seller Total (sum of drug total and shipping fee)
- Shipping note:
    1. Per the MatchRX User Agreement, your order may take up to two business days to process by the Seller. After processing, your

order will be shipped via the above selected shipping method."
2. Please Note: your order(s) may take up to two business days to process by the Seller. After processing, your order(s) will be shipped via the above selected shipping method.

- Grand Total (sum of Seller A Total and Seller B Total)
- Submit order

Maximum number of sellers per shopping cart is 5.

Shipping

US 28 - MRX Cart & Checkout page - Checkout Page - Shipping

Order Summary:

US 28 - MRX Cart & Checkout page - Order Summary

Acceptance Criteria:

1. The shopping cart correctly displays the quantity (not the number of unique NDCs) currently in the cart.
2. When the user clicks the shopping cart icon, the app redirects the user to check out page .
3. If the user hasn't added any item to the cart and clicks the shopping cart icon, the checkout page will be empty with the message "Your shopping cart is empty".
4. Items sold by the same seller is grouped as one order. Max of five sellers should be allowed per checkout page.
5. Each seller should have a Hyperlink. When clicked, the user should be taken to Buy marketplace and shown Seller's other items
6. Fields mentioned in Business rules section should be correctly displayed
7. Shipping note should be displayedShipping & Order Summary
8. Refer US 28 - Acceptance Criteria

Screen Prototype

US 33 - Mobile Wishlist

WBS #	
Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-175	WBS 144: Mobile Wishlist	Mar 26, 2018 10:28		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 7

1 issue

Table of Contents

User Story

As a registered user of MRX mobile, I want the ability to view and delete the NDCs that I have added to the wishlist.

End Objective:	To provide a page for registered users to view and delete wishlist-ed NDCs
User/Actor:	Primary users and Secondary users of MRX mobile app
Program Type:	Mobile
Trigger:	Click on "Wishlist" Icon on hamburger menu
Related User Story:	US 21 - Mobile Buy Menu & US 27 - MRX 3.0 Wishlist
Related WBS #:	144

Related WBS description

144	As a user I want to have a wishlist of items with columns: - Select list item (check-box); - Item (item name [link to "All postings" site with postings list filtered to this item]); - Compare prices (price [price choosing algorithm not known] [link to "All postings" site with postings list filtered to this item]); - Wish date (date added to wishlist). Column headers allow list sorting. List footer (summary, list navigation). "Remove from wishlist" button (works for selected items).

Business Rules

Wishlist

This page will list all the NDCs that have been added to the wishlist by any user of a member pharmacy in a grid. The grid will have the following fields.

Field Name	Rules
Trash icon	If the user clicks Delete trash can icon, a warning message should be displayed requesting the user to confirm the delete.
NDC #	Hyperlinked. When user clicks on the NDC #, the system should search the buy marketplace with the NDC #
Drug Name	Read only field
Available Qty	Mentions the quantity (not the number of postings) available in the marketplace for the NDC.
Wishlist Date	Read only field. Date on which the product was added to the wishlist

Above the grid, the page will have the message "A summary email will be sent every morning listing all of your wishlist items posted the previous date."

The items will be sort by date added to wishlist (newest item added on top). The page should have infinite scrolling.

Acceptance Criteria

My wishlist page:

1. All fields mentioned should be correctly populated
2. The user should be able to successfully delete an NDC in the wishlist
3. The app should provide a warning when the user clicks the trash icon.

Screen Prototype

My wishlist page

US 34 - VM Post item

WBS #	Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
	MHX-329	WBS 85: PHP VM item preview	May 21, 2018 07:57		Unassigned	IN QA	Unresolved	Sprint 10
	MHX-328	WBS 82: PHP VM Bulk upload (csv)	Aug 10, 2018 11:32		Karthigaichamy Malaimegam	IN QA	Unresolved	Sprint 14
	MHX-279	WBS 81: PHP VM Post one Item	Jul 26, 2018 11:17		Divyalakshmi	IN QA	Unresolved	Sprint 8
	MHX-248	WBS 90: PHP VM Promo Items	Apr 16, 2018 10:18		rajasekar.jeyakumar@htcindia.com	DEVELOPMENT	Unresolved	Sprint 8
	4 issues							

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered user of VM Wholesaler application, I want the ability to post items so that I can sell

End Objective:	To provide a page for registered users to post their item to sell
User/Actor:	Primary users and Secondary users of VM Wholesaler
Program Type:	Webpage
Trigger:	Click on "Sell" Tab
Related User Story:	
Related WBS #:	81, 82, 85, 90

Related WBS description

81	As a vendor I want a "Sell" button to display a form in which I define my posting: User selects Category and Sub category. The follow information is required for posting. 1) Title 2) Description 3) Price (should be more than 0) 4) Quantity (should be more than 0) 5) Images (Limit 4 in number - size restriction) 6) Shipping - Free shipping - Flat fee - Ground - Next day - Two day - Frieght 7) Return policy - Returnable - Yes/No If yes, Text box - Vendor enters the return policy 8) UPC if available (no validation) 9) Seller SKU ID 10) Suggested Retail price 11) Promotion: Yes/No Promo Price: As a % and Price Duration of the promo: Start and End Date 12) Tags: Attributes All of the above (except UPC) will be required field. There are no business rules. All the posting will have to be approved manually by the BO user before the posting becomes live on the website. Members are restricted from posting any NDC-related medication. Return policy should be described by the vendor per each item (not per Vendor)
82	Bulk upload of items for sale should be applied to our postings list/postings form. Format can be csv, xml. 1) Title 2) Description 3) Price (should be more than 0) 4) Quantity (should be more than 0) 5) Images (Limit 4 in number - size restriction) 6) Shipping - Free shipping - Flat fee - Ground - Next day - Two day - Frieght 7) Return policy - Returnable - Yes/No If yes, Text box - Vendor enters the return policy 8) UPC if available (no validation) 9) Seller SKU ID 10) Suggested Retail price 11) Promotion: Yes/No Promo Price: As a % and Price Duration of the promo: Start and End Date Members are restricted from posting any NDC-related medication. Return policy should be described by the vendor per each item (not per Vendor)
85	Display item preview when items are posted individually (not bulk). This will be preview of how the posting will be displayed to a buyer.
90	Promo Items Management If vendor wishes to create a promotion for a specific item, we will use the functionality which allows to state item as promo, state discount %, and duration of promo. The promo items should have a special tag to differentiate from normal items in the buy marketplace page. Once the promo period ends, the posting should remain live without the sale tag.

Posting form

When the user clicks the Sell tab on the left navigation pane, the system should display the "Post item" tab with the below fields.

Field Name	Example	Data Type	Default Value	M/O/R*	Control Type	Remarks

Seller SKU ID	abC-123	varchar(min 1, max 50)	Empty	O	Text box (default cursor focus should be on this feild)	Internal reference number for the wholesaler. This will not be displayed on the buy marketplace When the user exits this field, the system has to check if this Seller SKU ID already posted (and un-deleted). If yes, the system has to provide the message "This SKU already exists. Do you want to continue?" Yes/No. If no, the seller SKU ID field will become blank.
Product Name	Handmade Organic Candle - Size 2	varchar (min 3, max 50)	Empty	M	Text box	
Category	Beauty Face Cream	varchar (min 1), max 50	Empty	M	Text box	When the user types, the system should suggest the relevant categories (searching only tertiary level). The user has to select from the suggestion. Else should throw an error. The user can choose to use browse category option to select the category.
Browse Category	Beauty Face Cream			O	Menu tree	
UPC	123456789	Numeric (min 3, max 13	Empty	O	Text box	
Description	Specialty candles made with organic material. Dimensions: 6" tall	varchar (min 3, max 1000)	Empty	M	Text Box	Information message to wholesalers: Please describe the product, dimensions, color, weight etc.
Price	$199.99	Numeric with two decimals (min $0.01 , max infinite)	Empty	M		
Sale Promo	N/A	N/A	Un-selected	O	Check box	If user selects, the fields Start date, End date, sale price and sale promo description should be displayed. Informational message that products will be posted with actual price when promo ends.
Start Date	Jan 20, 2019	Calendar	Current date	M if sale promo is checked	Calendar	The date has to be current date or in the future. The promo will start on the start date mentioned. Irrespective of the state of the seller, we should use EST time for starting the promo.
End Date	Feb 01, 2018	Calendar	Empty	M if sale promo is checked	Calendar	Max number of promo days - 90 days from start date (both inclusive). This is to prevent indefinite promo. The date has to be current date or in the future. The promo will end on the start of day after end date. Irrespective of the state of the seller, we should use EST time for ending the promo.
Sale price	$149.99	Numeric with two decimals	Empty	M if sale promo is checked		Has to be less than Price field. % discount (whole number. 20.4% should be rounded to 20% and 20.5% should be rounded to 21%) should be displayed next to the field % discount = [(Sale price - Price) / Price] x 100
Sale Promo description	Labor Day Sale	varchar (min 3, max 500)	Empty	O	Text Box	.
Quantity	90	Numeric (has to be a positive integer) (min 1, max infinite)	1	M	Text field	
Minimum Order Quantity	10	Numeric (has to be a positive integer) (min 1, max = qty field)	1	M	Text field	When the quantity value is below the minimum order quantity (possible when purchased by many buyers), the item should not be displaedy in the buy marketplace and buyers will not be able to place an order (even if it already added to the cart).
Maximum Order Quantity	100	Numeric (has to be a positive integer) (min 0, max = infinte)	blank	O	Text field	Infinite maximum order quantity, if user leaves the field blank. Max order qty has to be same or more than min order qty.
Quantity Discount (Apply discounts for Bulk purchases)		checkbox	Unchecked	O	checkbox	

<table>
<tr><td>Quantity Discount table</td><td></td><td></td><td></td><td>M if Quantity discount is selected</td><td>Table</td><td>Options (Radio button): % discount / flat $ discount per unit
<table>
<tr><th>Min</th><th>Max</th><th>% discount/flat $ discount per unit</th></tr>
<tr><td>2</td><td>5</td><td>0%</td></tr>
<tr><td>6</td><td>10</td><td>10%</td></tr>
<tr><td>11</td><td>20</td><td>15%</td></tr>
<tr><td>21+</td><td></td><td>20%</td></tr>
</table>

User should be able to add rows infinitely.

Min value should be auto-populated. The first Min value will be the value in "Minimum order quantity" field + 1. The next min value will be one plus the previous max value and so on. There is no limit on Max value.</td></tr>
<tr><td>Suggested Retail Price</td><td>$299.99</td><td>Numeric with two decimals</td><td>Empty</td><td>M</td><td>Text field</td><td>Has to be more than price field (even when sale promo field is checked)</td></tr>
<tr><td>Return Policy</td><td>Yes</td><td>Yes/No radio button</td><td>Empty</td><td>M</td><td>Radio button</td><td>If yes is selected, "return policy" description text box has to enabled.</td></tr>
<tr><td>Return Policy description</td><td>Return accepted 30 days from the shipped date</td><td>varchar

(min 3, max 200)</td><td>Empty</td><td>M if return policy is Yes</td><td>Text box</td><td></td></tr>
<tr><td>Ships within</td><td>2 days</td><td>Days (min 1, max 14)</td><td>No selection</td><td>M</td><td>Dropdown</td><td></td></tr>
<tr><td>Free shipping</td><td>checkbox</td><td>checkbox</td><td>Unchecked</td><td>O</td><td>checkbox</td><td>If selected the fields shipping box dimension, weight, shipping fee per shipping box and max qty per shipping box is hidden</td></tr>
<tr><td>Shipping box dimension (inches)</td><td>2 x 10 x 8</td><td>numeric (in inches and one decimal allowed. min 1 digit, max 4 digit +1 decimal digit)</td><td>Empty</td><td>M if free shipping is unchecked</td><td>text box</td><td></td></tr>
<tr><td>Weight (lbs)</td><td>8</td><td>numeric (in lbs and one allowed)</td><td>Empty</td><td>M if free shipping is unchecked</td><td>text box</td><td></td></tr>
<tr><td>Shipping fee per shipping box</td><td>$10</td><td>Dollar</td><td>Empty</td><td>M if free shipping is unchecked</td><td>text box</td><td></td></tr>
<tr><td>Max qty per shipping box</td><td>100</td><td>numeric (min 1, max infinite, no decimals)</td><td>Empty</td><td>M if free shipping is unchecked</td><td>text box</td><td></td></tr>
<tr><td>Image</td><td></td><td>Images (min 1, max 4)

Size : 10 Mb/image</td><td>Empty</td><td>M</td><td>Image upload button</td><td>The system should compress the image to the resolution required for webpage
Format: The system should allow standard image formats and convert to .png and store it.
Crop and resize: The system should provide frame (similar to facebook profile picture upload experience) which the user can use to crop the image.
All user uploaded pictures will be immediately live with the posting without the need for an approval. A back office user should have the ability to view and remove one or more user uploaded pictures without removing the posting.

User will be able to reorder images. The first image will be defaulted as primary image and the user will be able to assign any image as primary. Only one image can be set as primary.</td></tr>
<tr><td>Tags</td><td>lipstick</td><td>varchar(min 2,</td><td>Empty</td><td>M</td><td>textbox</td><td>Tags should be separated by comma.

The system should suggest tags based on the commonly used tags that match the phrase typed by the user.

The database of commonly used tags will grows as users enter more tags.

Max number of tags per posting is 5</td></tr>
<tr><td>Status</td><td>Active</td><td>Selection buttons</td><td>Active</td><td>M</td><td>Selection buttons and calendar</td><td>Options: Active, inactive.active later (mandatory calendar - Future date only).

If active later, the post will become active on the date mentioned in the calendar. Irrespective of the state of the seller, we should use EST time for making the post the active.</td></tr>
<tr><td>Preview</td><td></td><td></td><td></td><td></td><td></td><td>When user clicks on Preview, the system will display a new page (US 41 - VM Product Details). Only item details tab should be displayed. Other tabs such as compare price and seller's other items need not be displayed.</td></tr>
</table>

Post					Button	

Business Rules

BR_Bulk Upload

The user should be able to bulk upload postings by uploading an .cvs file . The system should provide a template .csv file with the fields prepopulated for a few items as an example for the user to download and fill information. The system should also provide a category file.

Bulk upload template: US_34_-_Bulk_upload_-_MG_June 22.xlsx

Categories: US 34 - Bulk upload categories.xlsx

Process:

The user should upload CSV file with image file name as column. The user should also Drag and drop the images in the image upload area on the website. After both are done, the user has to click upload.

BR_Error

When bulk upload fails for certain lines in the CSV file: The system has to display the error message "You have successfully uploaded '{number of items uploaded} items. '{number of items failed to upload} items failed to upload. The following items failed to upload

'{List of items with row number that failed to upload}

The system should also provide a file with items that failed to upload.

Buttons:

Save (save the upload of the successful ones)

Cancel (discard the upload of any item)

BR_Leaving the page message

If the user clicks on any other tab(e.g. My order) after entering Product name, the system has to display the below message and ask the user to confirm before proceeding.

"The information in this page will not be saved. Do you want to leave this page?" Confirm and cancel buttons.

Acceptance Criteria:

1. All the field validations and data type is working correctly.
2. Price is not less than or equal to sale price
3. Suggested retail price is not less than or equal to price or sale price.
4. Sale promo start date and end date do not allow past date.
5. Sale promo end date is not more thann 90 days from start date
6. Sale promo start date is equal to or less than end date

US 35 - VM My Postings and Edit a posting

WBS #	
	See table below

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-1124	CLONE - WBS 80: PHP VM - See list of my postings	May 21, 2018 06:49		rajasekar.jeyakumar@htcindia.com	IN QA	Unresolved	Sprint 9
MHX-300	WBS 89: VM Out of Stock Management	Apr 20, 2018 07:53		rajasekar.jeyakumar@htcindia.com	DEVELOPMENT	Unresolved	Sprint 9
MHX-284	WBS 86: PHP VM Delete Posting	Mar 20, 2018 08:09		rajasekar.jeyakumar@htcindia.com	IN QA	Unresolved	Sprint 7
MHX-283	WBS 83: PHP VM Edit Posting	Apr 27, 2018 09:46		rajasekar.jeyakumar@htcindia.com	DEVELOPMENT	Unresolved	Sprint 9
MHX-282	WBS 80: PHP VM - See list of my postings	Apr 10, 2018 09:27		rajasekar.jeyakumar@htcindia.com	IN QA	Unresolved	Sprint 7
MHX-281	WBS 88: PHP VM Export Posting	Mar 20, 2018 08:09		rajasekar.jeyakumar@htcindia.com	IN QA	Unresolved	Sprint 7
MHX-280	WBS 87: PHP VM Hide Posting	Mar 20, 2018 09:25		Karthigaichamy Malaimegam	DEVELOPMENT	Unresolved	Sprint 7

7 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered user of VM Wholesaler application, I want the view all my open posting and the ability to edit a posting so that I can change the details of a posting

End Objective:	To provide a page for registered users to view and edit their postings
User/Actor:	Primary users and Secondary users of VM Wholesaler application
Program Type:	Webpage with Form
Trigger:	Click on "Sell" Menu
Related User Story:	US 34 - VM Post item
Related WBS #:	80, 83, 86 - 89

Related WBS description

80	All my posted items - posting date - status - posting details 1) Title 2) Primary Image 3) UPC if available (no validation) 4) Seller SKU ID
83	Edit form has the same rules as posting form 1) Title 2) Description 3) Price (should be more than 0) 4) Quantity (should be more than 0) 5) Images (Limit 4 in number - size restriction) 6) Shipping (Check box to choose the below option and a separate box to enter the shipping fee) - Free ground shipping - Flat fee - Ground - Next day - Two day - Frieght 7) Return policy - Returnable - Yes/No If yes, Text box - Vendor enters the return policy 8) UPC if available (no validation) 9) Seller SKU ID 10) Suggested Retail price 11) Promotion: Yes/No Promo Price: As a % and Price Duration of the promo: Start and End Date The user should have the ability to do bulk updates. The user should also have the option to update existing postings and create new postings with the same file upload. Members are restricted from posting any prescription related medication. Return policy should be described by the vendor per each item (not per Vendor)
86	As a vendor I want to be able to delete my posting. [if it is not in a lifecycle] I want the system to notify me on success or failure. The Manage page will not have the details of the deleted post. The database will have the deleted post and the BO user will have ability to view the deleted post.
87	As a vendor, I want to be able to hide a posting. This posting will not be displayed in the marketplace. This posting will be visibile in the manage page.
88	As a vendor, I want to able to export my current posting as a .csv file
89	As VM 0.0 has no backorders - if no quantity available, item does not display. This posting will be visibile in the manage page.

Business Rules

My postings

This page will be part of the "Sell" menu and it will list all the open postings of a particular member in a grid. The grid will have the following fields. While editing a posting in "My postings" page, all business rules mentioned in user story US 34 - VM Post item is applicable for this page. On top of that, the follow rules should be implemented.

Field Name	**Rules**
Action buttons	Selection - User can check/uncheck to select the posting. The user should be able to select all postings on the page by click on the check box in the header. User should be able to delete multiple postings at once. The user should be provided a warning pop up to confirm deletion. Edit button - User can click and it will redirect the user to "Edit a posting" page Delete button - User can click to delete the posting. The user should be provided a warning pop up to confirm deletion.
Posting ID	Unique ID generated for the posting by the system. User cannot edit.
Image	Primary Image

Product Name	User cannot edit
UPC	User cannot edit
Seller SKU ID	User can edit
Price	User can edit
Sale Price	If the sale promo check box is select, the sale price has to be displayed. Else blank. User can edit.
Available Quantity	Default value will be equal to originally posted quantity subtracted by the quantity ordered by the buyers. If an order is canceled, the quantity is not added to the available quantity. User can edit. The posting should be displayed even if the available quantity is zero.
Ship Carrier	Display the ship carrier selected for the posting by the seller. If the seller has selected more than one ship carrier, display the text "Multi".
Last Modified	User cannot edit. System should generate. The posting should be sorted by last modified field (newest first)

The user should be able to

1. Select multiple postings
2. Sort using all the above fields except Image. The user should be able to sort based on selection fields.
3. Options to select all postings (display number of postings selected), select none and delete selected postings
4. Search by product name, UPC, Seller SKU ID and Ship Carrier.
5. Print selected postings as a report with above fields
6. Export selected postings as a report with above fields (file format will be similar to MRX posting export file My postings export.xlsx)

Ability to upload file to quick update quantity and price with Posting ID.

The page should have pagination at the bottom of the page

- "number of items per page" drop-down menu (10/25/50/100/200 items per page) - Default value 100
- navigation between pages
- sum-up ("X to YYY. Page A of B.").

Vacation Mode button

A member will be able to temporarily hide all of their postings from the marketplace. The member should choose the start date and end date. The member cannot choose to hide postings selectively.

This should be a button on the top of the page. If vacation mode is set, display the button in a different color and display the start and end date. When the button is clicked, it should popup with the content,

"Temporarily hide your postings from the marketplace by choosing Start and end date"

and display the following fields

Start date: Calendar option - has to be current date or a future date

End Date (including): Calendar option - has to be current date or a future date and has to be same or after start date.

Confirm button.

Once the user sets the vacation mode, the user will be able to change the start date and the end date. without turning off the vacation mode and see the below message

"You are currently in vacation mode and your postings are temporarily hidden from the marketplace. Your postings will be visible on (end date + 1}".

The user will also have the option to turn off the vacation mode.

The user will be able to set only one set of vacation dates.

BO user should also be able to do it from Salesforce screen on behalf of the member.

Edit a posting

The user will land in this page, when the user clicks on edit in the "My postings" page. This page will be very similar to the post item page (US 34 - VM Post item) with certain fields disabled for editing. All business rules mentioned in user story US 34 - VM Post item is applicable for this page. On top of that, the follow rules should be implemented.

Field Name	**Example**
Seller SKU ID	User can edit
Product Name	User can edit
Category	User can edit
Browse Category	User can edit category using this option
UPC	User can edit
Description	User can edit
Price	User can edit
Sale Promo	User can edit
Start Date	User can edit
End Date	User can edit
Sale price	User can edit % discount (whole number. 20.4% should be rounded to 20% and 20.5% should be rounded to 21%) should be next to the sale price as read only field. % discount = [(Sale price - Price) / Price] x 100
Sale Promo description	User can edit
Available Quantity	Default value will be equal to originally posted quantity subtracted by the quantity ordered by the buyers. If an order is canceled, the quantity is not added to the available quantity. User can increase or decrease.
Minimum Order Quantity	User can edit
Maximum Order Quantity	User can edit
Quantity Discount (Apply discounts for Bulk purchases)	User can edit
Quantity Discount table	User can edit
Suggested Retail Price	User can edit
Return Policy	User can edit
Return Policy description	User can edit
Ships within	User can edit
Free shipping	User can edit
Shipping box dimension (inches)	User can edit
Weight (lbs)	User can edit

Shipping fee per shipping box	User can edit
Max qty per shipping box	User can edit
Image	User can edit
Tags	User can edit
Status	User can edit
Preview	
Cancel	
Update	
Delete	

BR_database

Each posting will have a unique posting ID. When a posting is updated, the history of previous values should be stored in the history field as a JSON script.

BR_Edit when item was ordered

A wholesaler should be able to edit a posting even if an order related to the posting is currently in the order life cycle or an order related to the posting has completed. In either scenario, the details of the order that was placed before the posting changes should not be changed but orders that are placed after the posting is updated should be based on the updated values.

BR_Edit when item in cart

If a wholesaler edits an item that is in the cart of a buyer, the buyer has to be notified that there is a change to the item when the buyer navigates to the checkout page next time.

The system should also validate when an order is being placed, if a posting has been updated between the time the buyer was in the checkout page and placing the order. If the posting has changed, the order should not be processed. The system should show the checkout page with the below message and the user has to place the order again if the item is still available.

"Item(s) in your cart have changed/removed. Please review and submit order again" (when one or more items have been changed or removed by sellers)

"The seller has informed us that the item is no longer available" (when all items in the cart have been removed by sellers)

BR_Out of stock

When the field available quantity field is 0, the posting should be hidden from the buy marketplace. The posting should not be removed from the "My postings" page.

Acceptance Criteria

My postings page:

1. The user is able to do in-line editing for the fields Available Qty, Price and Sale Price
2. Sort using all the above fields except Image
3. The user is able to sort based on Operations fields
4. The user is able to search based on product name , UPC and Seller SKU ID
5. The user is able to select multiple posting and delete, print and export.
6. The user is able to select all postings and select none
7. The user is able to set vacation settings
8. The vacation mode turns off after the last day of vacation schedule.

Edit a posting page:

1. The user is able to edit the fields based on the rules mentioned.
2. The system should show the message Do you want to delete this posting?", when a user deletes a posting
3. When a user updates an posting which has a open order in life-cycle, the order should not be updated.
4. When a user updates an posting which has a completed order, the order should not be updated.
5. When a user updates an posting which has been placed in the cart by another user, the user should receive either of the message

   "Item(s) in your cart have changed/removed. Please review and submit order again" (when one or more items have been changed or removed by sellers)

   "The seller has informed us that the item is no longer available" (when all items in the cart have been removed by sellers)

Screen Prototype

My postings page

Gabecare Direct Rx Inc (BG4827765) Your cart is EMPTY

MatchRX your overstock solution

My Savings LAST 12 MONTHS $8,932.62

BUY | SELL | MANAGE | MESSAGES | WISHLIST | Quick Search | CLEAR

[+ ADD NEW POST] [+ PRINT STOCK REVIEW PAGE]

Quick Editable Values

Operations	Drug Name	NDC	Lot #	Expiration Date	Packaging Option	Available Quantity	Price	Last Modified
EDIT	FLUOXETINE HCL	00378073493	8044218	02-2018	BOTTLE (30 EA)	1	$ 26.96	04-11-2017
EDIT	MEGESTROL ACETATE	49884028901	28854301	08-2019	PARTIAL: BOTTLE (100 EA)	36 / 100	$ 6.15	04-11-2017
EDIT	ETODOLAC	51672401801	301588	04-2018	BOTTLE (100 EA)	1	$ 80.41	04-10-2017
EDIT	ETODOLAC	51672401801	301588	04-2018	PARTIAL: BOTTLE (100 EA)	75 / 100	$ 67.40	04-10-2017
EDIT	ESTRADIOL	51862033201	33810947	01-2019	PARTIAL: BOTTLE (100 EA)	70 / 100	$ 14.89	04-10-2017
EDIT	CREON	00032120370	1067000	04-2018	PARTIAL: BOTTLE (70 EA)	69 / 70	$ 71.43	04-10-2017
EDIT	SIROLIMUS	55111065301	H600029	10-2017	PARTIAL: BOTTLE (100 EA)	70 / 100	$ 591.50	03-27-2017
EDIT	EMTRIVA	61958060101	007419	11-2018	BOTTLE (30 EA)	1	$ 481.00	03-13-2017
EDIT	DAPSONE	49938010130	16204	06-2019	PARTIAL: BOX (30 EA)	10 / 30	$ 23.00	03-10-2017
EDIT	LASIX	00039006013	8073101	01-2018	PARTIAL: BOTTLE (100 EA)	20 / 100	$ 8.00	02-16-2017
EDIT	TRIAMCINOLONE ACETONIDE	45802005505	6CT0624	01-2018	JAR (454 GM)	1	$ 30.13	01-27-2017
EDIT	DIPYRIDAMOLE	00054043625	459736	11-2017	PARTIAL: BOTTLE (100 EA)	30 / 100	$ 11.60	01-23-2017
EDIT	AMETHIA	52544026829	WFYB	04-2018	DISP PACK (91 EA) X 2 EA	1	$ 223.77	10-11-2016
EDIT	GLYCOPYRROLATE	49884006501	M15100	01-2018	PARTIAL: BOTTLE (100 EA)	80 / 100	$ 25.00	07-20-2016
EDIT	FLUTICASONE PROPIONATE *	00713063260	06320001	02-2018	TUBE (60 GM)	1	$ 20.00	01-14-2016
EDIT	SELZENTRY	49702022418	M81963	05-2019	PARTIAL: BOTTLE (60 EA)	3 / 60	$ 54.00	01-12-2016
EDIT	NITROGLYCERIN TRANSDERMAL	47781029803	140501	12-2017	BOX (30 EA)	3	$ 12.50	12-02-2015

SELECT ALL SELECT NONE INVERT SELECTION REMOVE SELECTED POSTS

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US 36 - BO Financial Transactions

WBS #							
	Key	**Summary**	**Updated**	**Due**	**Assignee**	**Status**	**Sprint**
	MHX-238	WBS 257: BO - Search ACH transactions	May 09, 2018 08:02		Swapna.Patnaikuni	DEVELOPMENT	Sprint 9
	MHX-237	WBS 256: BO - VM Transaction details [Details of the transaction view]	May 09, 2018 08:02		Swapna.Patnaikuni	DEVELOPMENT	Sprint 9
	MHX-236	WBS 255: BO -VM Transaction details[Create/Edit Financial Transactions]	May 09, 2018 08:01		Swapna.Patnaikuni	DEVELOPMENT	Sprint 9
	MHX-235	WBS 254: BO - List all VM ACH transactions including historical	May 09, 2018 08:01		Swapna.Patnaikuni	DEVELOPMENT	Sprint 9
	MHX-234	WBS 253: BO - List all VM financial transactions including historical	Sep 24, 2018 09:51		Swapna.Patnaikuni	IN QA	Sprint 16
	MHX-225	WBS 208: BO - Search transactions	Apr 10, 2018 03:14		Swapna.Patnaikuni	IN QA	Sprint 8
	MHX-224	WBS 207: BO - 3.0 Transaction details [Details of the transaction view]	Apr 12, 2018 06:25		Swapna.Patnaikuni	IN QA	Sprint 8
	MHX-223	WBS 206: BO - 3.0 Transaction details[Create/Edit Financial Transactions]	Apr 12, 2018 06:25		Swapna.Patnaikuni	IN QA	Sprint 8
	MHX-188	WBS 261: BO - List all VM CC transactions with relevant filters	Sep 24, 2018 09:51		Swapna.Patnaikuni	IN QA	Sprint 16
	MHX-187	WBS 260: BO - List all VM CC transactions including historical	Sep 24, 2018 09:51		Swapna.Patnaikuni	IN QA	Sprint 16
	MHX-186	WBS 205: BO - List all 3.0 transactions with relevant order filters	Apr 09, 2018 14:21		Swapna.Patnaikuni	IN QA	Sprint 8
	MHX-185	WBS 204: BO - List all 3.0 transactions including historical	Apr 12, 2018 06:25		Swapna.Patnaikuni	IN QA	Sprint 8
	MHX-174	WBS 259: BO - VM ACH Transactions view MMS integration	Sep 11, 2018 13:20		Swapna.Patnaikuni	IN QA	Sprint 15
	13 issues						
Document status	APPROVED						
Document owner	Raghul Manoharan						
UI Developer							
Developers							
QA							

Table of Contents

User Story

As a back office user of MatchRx, I want the ability to view all financial transactions by all pharmacies so that I can know the details of the transactions.

End Objective:	To provide a system for the back office users to view by all pharmacies' financial transactions and its details
User/Actor:	Back office users of MatchRX
Application:	Salesforce
Trigger:	
Related User Story:	

Related WBS Description:

204	I want to view transactions after it has picked up Fedex (for 3.0) or has tracking # (for VM) as a list with columns: - Order #; - Order Status - Member; (seller/buyer) - Amount (money); - Type (Credit / Debit); - Transaction date (date & time); - Form of Payment (ACH/Visa/MasterCard/Amex/Discover) - Payment Date (date & time populated from MMS & Zeamster); - Note (string);
205	I want predefined list views with relevant orders filtering, list columns & list sorting for each stage of transaction: - Audit; - Debit transactions (current); - Debit transactions (historical); - Credit transactions (current); - Credit transactions (historical); - Fees MRX and shipping (current); - Fees MRX and shipping (historical); - Platform (3.0 / VM) - All historical; I want to: - search the list; - mange view of the list (number of records per page, sorting, navigation); - export the list to CSV/XLS file; - print the list. e.g. In 2.0: Once seller confirms, a debit transaction (Column - debit transaction) is created (money is not actually pulled from the account at this point). Every business day, a batch file with all such debit transactions from previous day or earlier is pushed to the bank. This date is ACH date.
206	I want to create new financial transactions and modify existing ones which are in current state (refer above - Current state means No ACH date). Additional information: - Transaction category (FEDEX_CLAIM / NUISANCE_FEE / SHIPPING_CHARGE / NSF_RESUBMIT / PROMO / REVISION / MRX_PAID
207	details of the transaction view Order ID: DEA #: (if order id provided, DEA of Seller and Buyer only. If not provided, text field to enter the DEA number) Member Name: Populated based on above DEA #. Read only. Transaction Amount: Transaction Type: (Credit/Debit) Transaction Category: Transaction Note: (comment field) Date Created:
208	search by different categories as number of order, status, transaction date, ACH date

253	I want to view transactions after tracking number is uploaded or has tracking # (for VM) as a list with columns: - Order #; - Order Status - Member; (seller/buyer) - Amount (money); - Type (Credit / Debit); - Transaction date (date & time); - Form of Payment (ACH/Visa/MasterCard/Amex/Discover) - Payment Date (date & time populated from MMS & Zeamster); - Note (string);
254	I want predefined list views with relevant orders filtering, list columns & list sorting for each stage of transaction: - Audit; - Debit transactions (current); - Debit transactions (historical); - Credit transactions (current); - Credit transactions (historical); - Fees MRX and shipping (current); - Fees MRX and shipping (historical); - Platform (3.0 / VM) - All historical; I want to: - search the list; - mange view of the list (number of records per page, sorting, navigation); - export the list to CSV/XLS file; - print the list. e.g. In 2.0: Once seller confirms, a debit transaction (Column - debit transaction) is created (money is not actually pulled from the account at this point). Every business day, a batch file with all such debit transactions from previous day or earlier is pushed to the bank. This date is ACH date.
255	I want to create new financial transactions and modify existing ones which are in current state (refere above - Current state means No ACH date). Additional information: - Transaction category (NUISANCE_FEE / NSF_RESUBMIT / PROMO / REVISION / MRX_PAID)
256	Details of the transaction view (as applicable) Order ID: DEA #: (if order id provided, DEA of Seller and Buyer only. If not provided, text field to enter the DEA number) Member Name: Populated based on above DEA #. Read only. Transaction Amount: Transaction Type: (Credit/Debit) Transaction Category: Transaction Note: (comment field) Date Created:
257	search by different categories as number of order, status, transaction date, ACH/settlement date
259	Everyday, a BO user uses MMS to pulls all financial transactions from Pearl which have the debit transaction date but no ACH date. MMS creates a internal file with these transactions in MMS. MMS then removes the transactions from the internal file if the transaction date is same as today. With DEA # as primary key, MMS appends the banking account details to each of the transaction in the internal file and transform the file to the format the bank will accept for ACH transaction. The BO user then downloads this file from MMS and uploads in the MRX primary bank's online banking page. If the bank returns a success message, the BO user clicks the "Process success" button in the MMS page. MMS then populates the ACH date for all those transactions in Pearl.
260	I want to view all CC transactions as a list with columns: - Order #; - transaction id - Order Status - Member; (seller/buyer) - CC details - CC Auth code / transaction ID (from Zeamster) - Amount (money); - Type (Credit / Debit); - Transaction date (date & time); - Note (string); The above information is retrieved from Zeamster

261	I want predefined list views with relevant list items filtering, list columns & list sorting for each stage of CC transaction: - Audit; - Debit transactions (current); - Debit transactions (historical); - Credit transactions (current); - Credit transactions (historical); - VM Fees (current); - VM Fees (historical); - All historical; I want to: - search the list; - mange view of the list (number of records per page, sorting, navigation); - export the list to CSV/XLS file; - print the list.

Business Rules

BR_Financial Transactions Basic Search

The Back office user should be able to search for financial transactions using the Global search

BR_List of Financial Transactions Page & Transactions Details Page

~~The default view, predefined filters, order details fields and automatic task creation are mentioned in the attached excel file~~

~~US 36 - Financial Transactions & Details 28Mar.xlsx~~

~~US 36 - Financial Transactions & Details 4Apr2018.xlsx~~

Updated May 18, 2018:

Salesforce will have the following two tabs:

1. ACH Transactions
2. Credit Card Transactions

ACH Transactions:

All the following transactions will be part of this tab:

- MRX 3.0 Buyer
- MRX 3.0 Seller
- VM Seller
- VM Buyer ACH only

The default view, predefined filters, and order details fields are mentioned in the attached excel file.

~~US 36 -ACH Financial Transactions & Details 18May2018.xlsx~~

US 36 -ACH Financial Transactions & Details 23Jun2018.xlsx - Added transaction status field and added "auto confirmed" in the field "Notes". Updates are highlighted in yellow (June 23)

Credit Card Transactions:

All the following transactions will be part of this tab"

- VM Buyer Credit card only

The default view, predefined filters, and order details fields are mentioned in the attached excel file.

US 36 - CC_Financial_Transactions_&_Details_18May2018-FINAL_MG.xlsx

MMS Financial System

Transaction Status	Explanation
Approved	These transactions should be included in the extract given to MMS system as long as the transaction date is the current date. The default value for all transactions.
On Hold	These transactions should be excluded in the extract given to MMS system. The BO user will set the transaction to this status if they want the transaction to be temporarily excluded from the MMS batch process
Complete	These are transactions which have been processed by MMS. These transactions will have ACH date. When MatchRX gets confirmation from MMS that bank processing is successful, MatchRX will change the transaction status from Approved to Complete.

MRX 3.0

When the BO user process the MRX 3.0 ACH transactions on MMS financial system to submit them to the bank, the MRX 3.0 system has to filter the ACH financial transaction with the below criteria and provide it to MMS system.

1. Include all MRX 3.0 transactions (both buyer and seller) with transaction status = Approved but exclude the transactions that have the current date as transaction date.

After the BO user successfully completes the banking transaction, the BO user will confirm the same on MMS screen and the MMS system will send the financial transaction back to MRX 3.0 system with ACH date and other details. Once the MRX 3.0 system receives the ACH date, the MRX 3.0 system has to change the transaction status = Complete

VM Buyer

When the BO user process the VM Buyer ACH transactions on MMS financial system to submit them to the bank, the VM system has to filter the ACH financial transaction with the below criteria and provide it to MMS system.

1. Include all VM Buyer ACH transactions with transaction status = Approved but exclude the transactions that have the current date as transaction date.

After the BO user successfully completes the banking transaction, the BO user will confirm the same on MMS screen and the MMS system will send the financial transaction back to VM system with ACH date and other details. Once the VM system receives the ACH date, the VM system has to change the transaction status = Complete

VM Seller

When the BO user process the VM seller ACH transactions on MMS financial system to submit them to the bank, the BO user will have the option to select the transaction date range. The VM Seller system has to filter the ACH financial transaction with the below criteria and provide it to MMS system.

1. VM Seller ACH transactions with the transaction date in the selected date range and
2. VM Seller ACH transactions with transaction status = Approved and
3. Corresponding Buyer CC transactions which are not settled by Zeamster should be excluded.

After the BO user successfully completes the banking transaction, the BO user will confirm the same on MMS screen and the MMS system will send the financial transaction back to VM system with ACH date and other details. Once the VM system receives the ACH date, the VM system has to change the transaction status = Complete

US 37 - BO VM Posting Categories

WBS #	Document status	Document owner	UI Developer	Developers	QA

Key	Summary	Updated	Due	Assignee	Status	Sprint
MHX-318	WBS 235: BO - Manage Posting Categories	Mar 17, 2018 12:53		Swapna.Patnaikuni	IN QA	Sprint 7

1 issue

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a back office user of MatchRx, I want the ability to view, edit and delete all the posting categories in Vendor Marketplace so that I can view, edit and delete the categories

End Objective:	To provide a system for the back office users to view, edit and delete VM posting categories
User/Actor:	Back office users of MatchRX
Application:	Salesforce
Trigger:	
Related User Story:	

Related WBS Description:

235	View list of all categories that can be used by a seller to post an item to the marketplace: - Category name - Date added - Number of postings within this category (count from the marketplace) Functionality to add/remove category and sub category for the BO user. FO user cannot add/remove category

Business Rules

BR_VM Posting Categories

The BO user should be able to view, add, edit and delete the categories. The categories will be arranged in three levels (Primary, Secondary and Tertiary). The list of categories will be found in the attached file.

US 37 - VM Category list.xlsx

US 38 - BO List of all Postings in VM

WBS #							
	Key	**Summary**	**Updated**	**Due**	**Assignee**	**Status**	**Sprint**
	MHX-321	WBS 238: BO - Review list of all postings from VM Vendors [predefined list views with relevant list items filtering]	Apr 10, 2018 07:58		Swapna.Patnaikuni	IN QA	Sprint 8
	MHX-320	WBS 237: BO - Review List of all postings from VM Vendors [Search]	Apr 10, 2018 07:50		Swapna.Patnaikuni	IN QA	Sprint 8
	MHX-319	WBS 236: BO - Review List of all postings from VM Vendors [list details]	Apr 10, 2018 07:49		Swapna.Patnaikuni	IN QA	Sprint 8
	MHX-264	WBS 241: BO - EDIT posting details from VM	Apr 10, 2018 08:27		Swapna.Patnaikuni	IN QA	Sprint 8
	MHX-263	WBS 240: BO - Review posting details from VM	Apr 10, 2018 08:25		Swapna.Patnaikuni	IN QA	Sprint 8
	MHX-262	WBS 239: BO - VM Remove (hide) existing posting from the marketplace	Apr 10, 2018 08:14		Swapna.Patnaikuni	IN QA	Sprint 8
	6 issues						
Document status	APPROVED						
Document owner	Raghul Manoharan						
UI Developer							
Developers							
QA							

Table of Contents

User Story

As a back office user of VM, I want the ability to view all postings by all wholesalers so that I can know the details of the posting.

End Objective:	To provide a system for the back office users to view by all wholesalers' postings and its details
User/Actor:	Back office users of VM
Application:	Salesforce
Trigger:	
Related User Story:	US 34 - VM Post item & US 35 - VM My Postings and Edit a posting

Related WBS Description:

236	Display all postings from all VM Vendors with the following info: - Vendor ID/Name - Posting ID - Posting status - posting details "- Posting Id; - Name (item); - SKU (vendor provided SKU #) - Posted (date & time); - Qty Posted (integer); - Qty Available (integer) - Qty Sold (integer) - Total (money); - Ship method (from dictionary); - Shipping paid by (from dictionary); - Deleted
237	I want to: - search the list; - mange view of the list (number of records per page, sorting, navigation); - export the list to CSV/XLS file; - print the list.
238	I want predefined list views with relevant list items filtering, list columns & list sorting for each stage of transaction: - Active; - Hidden [temporarily removed from marketplace to be then shown again e.g. vacation mode] - deleted, [removed foreverfrom marketplace but still shown for BO]- sold - expired postings
239	As BO user i want to Remove (hide) chosen posting(s) from the marketplace. Check if the posting is not in active order lifecycle - allow action. E.g. If a seller posted an item with qty 5. Let's say an order for 2 is in active order life cycle. If the BO user wants to hide this posting, then the BO user can hide the posting with 3 qty which are showing in the marketplace currenty. If hide - mark as hidden in BO, leave them in BO list, remove from marketplace - ability to unhide only by the BO - so that items will be again visible on Marketplace. Post's visibility can be controlled by BO. If delete - remove totally from marketplace, still display as "removed" at BO. Ability to select mutliple posting at once and perform an action.
240	As BO user I want to see posting details : - Posting Id; - Vendor ID/Name - Posting status - posting details "- Posting Id; - Name (item); - Description - Posted (date & time); - Qty posted (integer); - Qty Available (integer); - Qty sold (integer); - Total (money); - Ship method (from dictionary); - Shipping paid by (from dictionary); - Deleted (boolean); - Comments for BO/FO user but not displayed on the VM FO(text); Status of the posting to be displayed - Active; - declined posting - Archived. (deleted posting)
241	As a BO user, I want the ability to edit VM posting details

Business Rules

BR_Postings Basic Search

The Back office user should be able to search for posting using the Global search

BR_List of Postings Page

US 38 - VM Postings.xlsx

BR_ BO Hide & Delete Postings

The BO user should be able to hide/delete the selected posting(s) from the marketplace. The BO user should be able to select multiple postings and perform the action.

Before hiding/deleting, the system has to check if the posting has any active order in the order life-cycle. If not, the system should allow action of hiding/deleting the entire posting. If there is a order in the lifecyle, the system should hide/delete only the quantity which is not in active order life-cycle.
For e.g. If a seller posted an item with qty 5. Let's say an order with qty 2 is in active order life cycle. If the BO user wants to hide/delete this posting, then the system can hide/delete the 3 qty which are currently shown in the marketplace currently.

Once hidden/deleted from the marketplace, the posting should be marked as hidden/deleted but still be view-able by the BO user. The BO user should also have the ability to un-hide a posting which will display the posting in the marketplace. The FO user should not be able to un-hide a BO user hidden posting. The BO should not be able to undo a delete of posting.

BR_Posting Details

When the user clicks on the Posting ID, the user should be redirected to details page which will have the same fields as mentioned in *BR_List of Postings Page*

BR_Edit Posting

The BO user should be able to edit the posting in SalesForce. The business rules mentioned in US 34 - VM Post item & US 35 - VM My Postings and Edit a posting will not be applicable. Editing through salesforce can override those business rules.

Acceptance Criteria

List of postings page

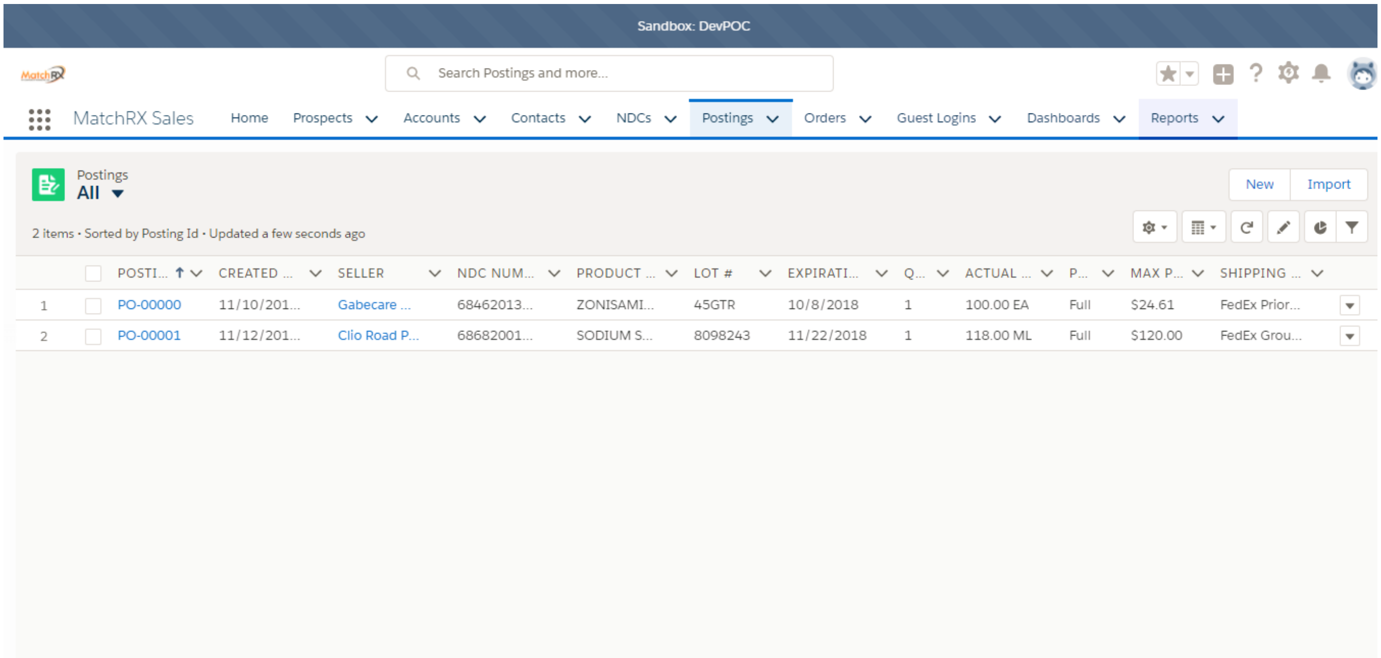
1. has the correct default columns
2. user role have right level of access

Posting Details page

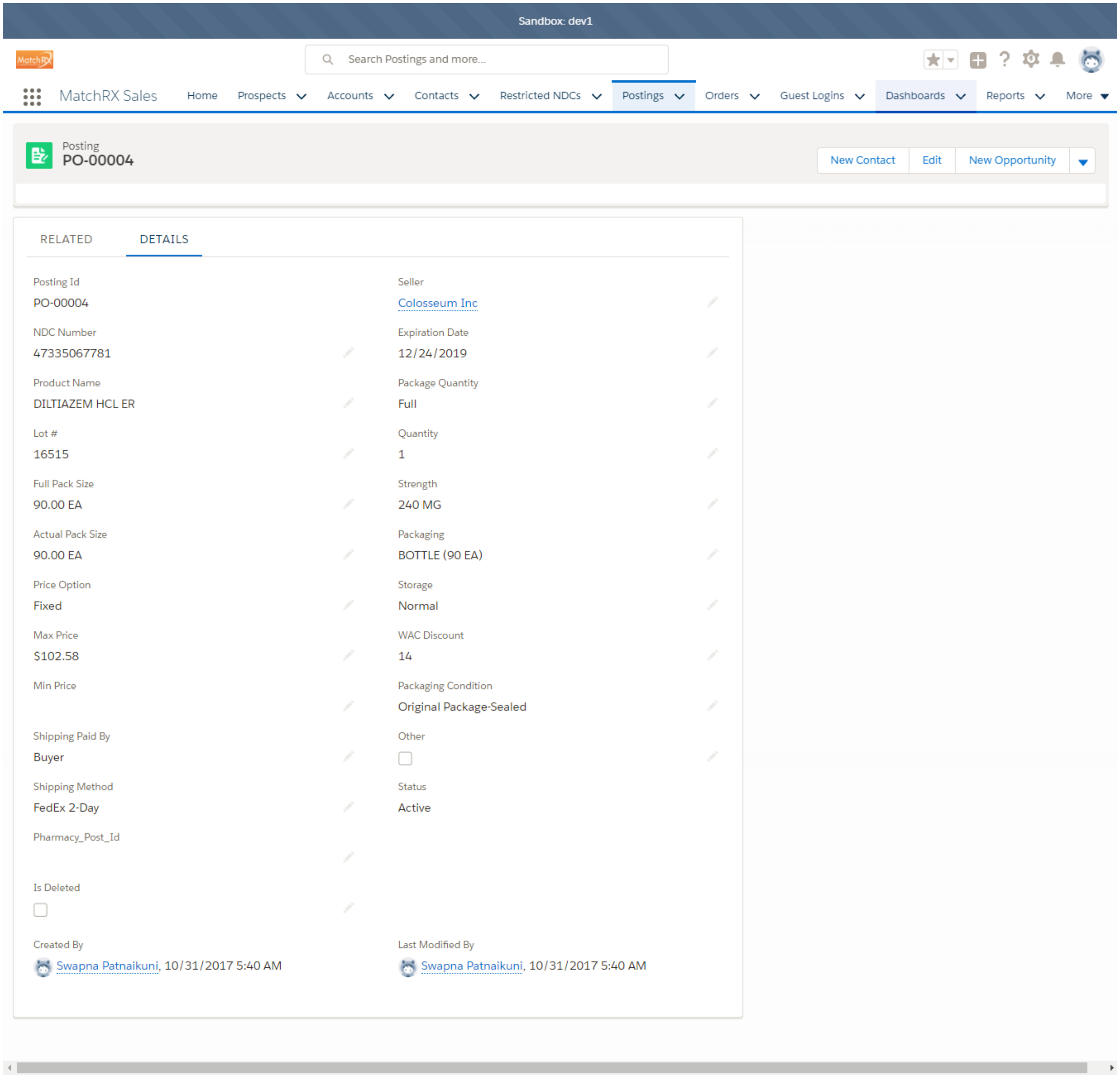
1. has the correct fields
2. user role have right level of access

Screen Prototype

1. List of Postings Page



2. Posting Details Page



US 39 - Mobile Order Life-cycle

WBS #

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-285	WBS 159: Mobile - On/Off Push notifications	Jun 29, 2018 09:22		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 11
MHX-222	WBS 158: Mobile - Buy lifecycle [Accept/Cancel the order]	Jun 29, 2018 09:23		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 11
MHX-219	WBS 154: Mobile - Buy lifecycle [Cancel an order after it was revised by the seller]	May 28, 2018 10:14		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 10
MHX-218	WBS 153: Mobile - Buy lifecycle [Accept the Order after revision by seller]	May 28, 2018 10:13		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 10
MHX-179	WBS 152: Mobile Sell lifecycle [Confirmation Status and Quantity Change]	May 28, 2018 10:13		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 10
MHX-178	WBS 151: Mobile Sell lifecycle [Prepare Shipping Documents]	Aug 09, 2018 05:37		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 11
MHX-177	WBS 150: Mobile Sell lifecycle[Confirm Shipment Option]	May 29, 2018 11:11		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 10

7 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered user of MRX mobile, I want the view order details so that I can view and take actions on my orders.

End Objective:	To provide a screen for registered users to view the order details and take action
User/Actor:	Primary users and Secondary users of MRX mobile app
Program Type:	Mobile App
Trigger:	Clicks on a card
Related User Story:	US 30 - MRX 3.0 Order Life-cycle & US 40 Mobile My Orders
Related WBS #:	150 - 154, 158

Related WBS description

150	As a selling pharmacy I want a "confirm shipment" button to confirm complete shipment of my sold posting. I want the system to display: - list of the items in the order; - "Confirmation status" radio button (Available / Revise); - Seller rating preview; - "Shipment details" form: -- shipping date; -- schedule parcel pick up / drop off; - Financial summary section; - buttons: Cancel; Submit.
151	As a pharmacy I want the system to prepare the shipping documents so that I can easily view theme (online) and/or print them (pdf). Ability to print or save as pdf from mobile.
152	As a selling pharmacy user, while confirming shipment of my sold posting, I want to be able to inform the buyer that the available quantity of the item has changed. I want to use the "Confirmation status" radio button (Available / Revise) and set it to "Revise" so that the system displays an item revision form: - "Out of stock" check-box; If seller originally posted multiple quantities within the same posting ID, the remaining quantity available in the marketplace should be changed to 0. - "Revised Partial quantity" (number) (active only if item was posted as "Pack quantity" = ~~Full~~ Partial); - "Revised full packages" (number) (active only if item was posted as "Pack quantity" = Full and ordered quantity is >1); - "Note" (string); - Buttons: Cancel; Save revision [display seller confirmation without shipment details. This will be part of the new "Order" tab - > Open orders page that is being created for 2.0. When clicked on Order number/Action button, the order details page have to show up with the above options. Business Rules: - If partial pack, seller cannot enter an amount equal or greater than the original posting quantity. - If partial pack, cannot change to a full pkg. - It is a violation of MatchRX policy to convert a full pack to a partial pack during the seller revision process. -If a full pack, seller cannot increase the quantity ordered. - State restriction that are applicable to posting an item
153	As a buying pharmacy user, I want to be able to accept an order after it was revised by the seller. The buyer is notified based on the notification setting.
154	As a buying pharmacy user, I want to be able to cancel an order after it was revised by the seller. After item was cancelled due to some reasons - posting of corresponding items in the order - disappears so that Vendor needs to post it again with usual posting procedure so that it would be availabe on a marketplace again. The order history information will be stored in the Database and displayed to BO. Currently, an email is sent to the buyer with options "Accept" and "Cancel". In 3.0, the buyer should have the ability to accept or cancel in the website.
158	As a pharmacy I want to be able to accept an order (after it was confirmed or after it was revised by the seller and accepted by me). I want the system to display: - Ordered items with "Available" radio button (Yes / No) for each list item; - "Seller rating" form (stars); - Financial summary section; - buttons: Cancel; Confirm. The buyer has two business days to confirm the receipt of the order. After 2 days, the order is manually marked as confirmed. For the BO, the list of order which has crossed the two business day mark will be displayed. I want the system to deactivate the seller rating form if I set Available = No for one or more ordered items. Develop forms/fields (CRM Case Management) to capture more information about the issue from the buyer.

Order Life-cycle Flowchart

US 30 - MRX 3.0 Order Life-cycle - flow chart

Order status dictionary

US 30 - MRX 3.0 Order Life-cycle - Order status dictionary

Notifications

US 30 - MRX 3.0 Notifications

Order Details Page

The order details page will vary based on section (US 29 - MRX 3.0 My Orders - My Orders) in which the order is found. In all statuses, if a BO user adds/edits/deletes an item in the order from Salesforce, it should be reflected in the app.

Sales in Progress - Action Required

Status = Pending Seller Confirmation

The order details page will have the following field.

Seller Confirmation: Confirm the availability of each item and quantity in the order by checking Available, Revise Qty/Pkg or Out of Stock in the "Confirmation Status" column.

Field Name	Information
Section 1	
Order Number	System Generated
Order Date	System Generated
Confirmation Status	Available Revise Qty/Pkg Out of Stock If packaging is full and quantity is 1, Revise Qty/Pkg option will be disabled. If the user selects Revise qty/pkg or Out of stock and if there is more quantity available in the marketplace for the same posting, the qty has to be changed to 0 and removed from marketplace.

<table>
<tr><td>Items in the order listed one below the other</td><td>The item details will have the following fields

Image
Drug Name
NDC
Lot #
Exp Date
Price
Qty (Field will not be displayed if packaging is partial)

If its a non-revised item, this field will display the qty placed in the original order. If it is a revised order, this field will display the qty accepted by Buyer.
If user clicks "Revise Qty", this field is enabled for edit if it is a full pack. The options should be 1 , 2, and so on with maximum value equal to one less than Qty column. The seller will select the quantity available with the seller pharmacy. If it is partial pack, the qty will remain 1 and the field will not be enabled for edit. .
If user clicks "Out of stock", the Qty should be changed to 0

Packaging

If partial,

If its a non-revised item, this field will display the partial qty placed in the original order. If it is a revised order, this field will display the partial qty accepted by Buyer.
If user clicks "Revise Qty", this field is enabled for edit. It will be text field (numeric only) and the max value allowed will be one less than ordered partial qty. The seller will select the quantity available with the seller pharmacy. The posting related to the item should not be changed in the DB
If user clicks "Out of stock", the partial qty should be changed to 0.

If full, this field will not be displayed.

Total

If full pack - Price x Qty available
If partial pack - (Price / partial qty ordered) x partial qty available

The seller will not be able to convert a full pack to partial or vice versa. Similarly, the seller will not be able to change a non-sealed package to sealed and vice-versa.</td></tr>
<tr><td>Message</td><td>Per the MatchRX User Agreement, buyer attests that items are for a specific patient need or purchased during a declared public health emergency.</td></tr>
<tr><td colspan="2">Section 2 - Option A - If quantity available is "Available" for all items in the order</td></tr>
<tr><td>Shipping Method</td><td>Read only field. The field will be populated based on shipping option selecting while placing the order</td></tr>
</table>

Add Fedex insurance (with hyperlink to T&C of fedex insurance - http://www.fedex.com/cm/shippingguide/terms/#18)	Based on the item total, the system should display the fedex insurance fee. The user should be given the option to opt in/opt out of FedEx insurance. FedEX insurance fee is calculated as follows: 1. If order value <= $100, the FedEx insurance fee will be $0 and the check box will be checked and read only. 2. If order value is $101, the FedEx insurance fee will be $2 and the check box will be unchecked and select-able. The system should add $1.00 per $100 in order value, rounding up to the nearest $100. Maximum FedEx insurance fee will be $500. 3. When the confirmation status of any of the item is changed, the previous selection of the FedEx insurance fee check box is wiped out, becomes unchecked and select-able. The only exception to this rule is when the revised value is <= $100. If the revised value is <=100, the check box will be checked and read only. E.g. **Order value** **FedEx insurance fee** $100 $0 $200 $2 $1001 $11 $50,000 $500 $50,001 $500 The app should also display the message "All shipments are insured up to $100 by FedEx. You may purchase additional FedEx insurance for the full item total. Maximum insurable value is $50,000."
Shipping Date	Today and Next business day (Fedex business day) should be shown as options. If the order contain Refrigerated/Frozen item and • current day is Thursday, the options will be Thursday and Monday. • current day is Friday/Saturday/Sunday, the option will be Monday only.
Package will be ready for pickup at informational message below the field "Allow up to x hours for pick up" where x is the pick up lead time from FedEx API	When shipping method = Ground • If today is selected, the next dropdown should only provide the option to drop off at fedex location • If next business day is selected, the dropdown should provide drop off at fedex location and pick up time slots based on Fedex API When shipping method - 2 day/ Priority Overnight • For both today and next business day selection, the dropdown should provide drop off at fedex location and pick up time slots based on Fedex API FedEx API will be provide the pick up lead time (e.g. 3 hours). The system should assume that all pharmacies close at 6 PM local time. The dropdown should provide pick up options until 6 pm minus the pick up lead time (e.g. 6 PM minus 3 hours = till 3 PM). For example, if lead time is 3 hours and the current time at seller's mailing address is 1 PM, the drop down options will be 1:30 PM, 2:00 PM, 2:30 PM, 3:00 PM. If the lead time is 2 hours, the options will be 1:30 PM, 2:00 PM, 2:30 PM, 3:00 PM, 3:30 PM, 4:00 PM.
Section 2 - Option B - If quantity available is "Out of Stock" for all items in the order	
Message	**This order will be canceled** The item(s) in this order is unavailable. You must click the **Submit Cancellation** button now to send a notification to the Buyer. Once submitted, no further action is required.
Section 2 - Option C - If quantity available is "Revised" for at least one items in the order or of it is "out of stock" for at least one item but not all items.	

Message	**This order has been modified** Please verify remaining items. When done click the **Submit Revision** button to send a notification to the Buyer. Approved revisions will automatically appear in the My orders - Sales in Progress section as an order awaiting Seller Confirmation.
Section 3	
MatchMoney	Separate User Story
Section 4	
Item(s) total	Value of the order in $ without including shipping and MatchRX fees. This value will be updated if the "Qty available" field is changed.
Shipping charge	Shipping cost to be paid by the seller. Refer US 28 - MRX Cart & Checkout page - Shipping to calculate the shipping total. If the shipping method is ground, $2.50 should be added. This $2.5 should be added even if the seller is not paying for the shipping. (seller_shipping_fee + seller_pickup_fee + additional_seller_shipping_fee + additional_seller_pickup_fee - refund_seller_shipping_fee) **+** **(**fedex_shipping_insurance + additional_fedex_shipping_insurance - refund_fedex_shipping_insurance) +
MatchRX fee	% of order value calculated based on Financial Group the member belongs to (US 18 - BO Manage Pharmacy Group - BR_Financial Group)
MatchMoney	Based on the MatchMoney section
Fedex Insurance	Display the insurance fee if the user opts in for Fedex insurance in Section 2
Credit total	(seller_shipping_fee + seller_pickup_fee + additional_seller_shipping_fee + additional_seller_pickup_fee - refund_seller_shipping_fee) **+** **(**fedex_shipping_insurance + additional_fedex_shipping_insurance - refund_fedex_shipping_insurance) + (mrx_fee – match_money_as_postive_value) - final_item_total
Submit Order / Submit Cancellation / Submit Revision	If quantity available is "Out of Stock" for all items in the order, the button text will be **Submit Cancellation.** If quantity available is "Revised" for at least one items in the order or of it is "out of stock" for at least one item but not all items, the button text will be **Submit Revision** If quantity available is "Available" for all items in the order, the button text will be **Submit Order.** The submit order/revision/cancelation button should be disabled. Only when one of the Available/Revise/OoS is selected and When Available is selected, ship date and package ready for pick up at fields is selected, the submit button should be enabled.
Back	

Once the user clicks one of the "submit" button, the following scenarios are possible:

Order canceled

If quantity available is "Not available" for all items in the order, the system has to set the status to "Canceled" and display the below message Order Cancellation Notice

Your order has been canceled

You may reach us at customerservice@matchrx.com
or call 1-877-590-0808.

Order revised

If quantity available is not equal to quantity ordered at least one of the item in the order, the system has to set the status to "Seller Revised" and display the below message

Order Revision Notice
You have indicated one or more of the items in the order is no longer available.* An account representative will contact the buyer on your behalf and you will receive
an e-mail informing you of the Buyer's decision to purchase or cancel the remaining items in the order. If the buyer accepts the revision, the order will automatically appear in the My orders - Sales in Progress section as an order awaiting Seller Confirmation.

You may reach us at customerservice@matchrx.com
or call 1-877-590-0808.

Full order confirmed

1. If the quantity available is equal to quantity ordered for all the items in the order, based on the "Schedule Pick Up/Drop Off" field selection , the system should change the status as follows
    a. Fedex Pick-up - status changes to Pending FedEx pick-up
    b. Fedex Drop-off - status changes to Pending FedEx drop-off
2. The system should provide a button to save and print the shipping documents (shipping label & packing slip). Instructions for seller: Inclu de the signed Packing Checklist with the order.
3. Display the message "Upon Fedex pickup/drop-off of any package, make sure FedEx scans your package at that time."
4. ASD DC Ground Packing.pdf (The content in this PDF should be shown as message on the app.)

Shipping label & packing slip

The following fields will be available in the shipping label & packing slip

matchrx_shipdocs_order_8771371.pdf

FedEx failure

Scenario 1:

We should display the seller confirmation page but the 2nd section – Shipping should be replaced with the below message and "submit order" button should be disabled. If the order is revised or marked as out of stock, the button would have changed to "submit revision" or "submit cancelation" which should be enabled.

"FedEx is experiencing technical difficulties at this time and they are working to resolve the issue. Please try again shortly"

Scenario 2:

If the FedEx API fails after "submit order" button is clicked and FedEx fails to provide the shipping label, we should display the above message. The system should not change the order status to "Seller confirmed" .The order status should be changed only when Fedex provides the shipping label. Also the financial transaction should be generated only after the change in status to "Seller confirmed".

Purchases in Progress - Action Required

Status = Seller Revised

Field Name	Information
	Section 1
Order Number	System Generated
Order Date	System Generated
Acceptance Status (for each item)	Accept / Reject

<table>
<tr><td>Items in the order listed one below the other</td><td>The item details will have the following fields

Image
Drug Name
NDC
Lot #
Exp Date
Price
Qty (Field will not be displayed if packaging is partial)

If its a non-revised item, this field will display the qty placed in the original order.
If it is a revised item, this field will display the original qty with a strike through and the revised qty.
If the item is marked out of stock, this field will display the original qty with a strike through and the new quantity as 0 (even for partial packaging)

Packaging

If partial,

If its a non-revised item, this field will display the partial qty placed in the original order.
If it is a revised item, this field will display the partial qty placed in the original order with a strike through and the revised qty
If the item is marked out of stock, this field will display the original qty.

If full, this field will not be displayed.

Total

If full pack - Price x Qty available
If partial pack - (Price / partial qty ordered) x partial qty available

</td></tr>
<tr><td>Message</td><td>Per the MatchRX User Agreement, buyer attests that items are for a
specific patient need or purchased during a declared public health emergency.</td></tr>
<tr><td colspan="2">Section 2</td></tr>
<tr><td>Shipping Method</td><td>The buyer should be given the option to choose the shipping method, if one or both of the following happens:

If the previous version for the order before seller revision had refrigerated item and all refrigerated items in the order were marked as Out of stock by the seller
If the buyer marks all refrigerated items in the order as rejected (even if the item is not revised by the seller)

The cost of shipping through Fedex API should be displayed. If the seller has agreed to pay for an item during the posting process and if order qualifies, the cost of relevant shipping method will be charged to the seller. If not, buyer pays for the shipping. Free shipping promo and two day shipping at ground rate will not be applicable while calculating the shipping cost.

If the revised order contains an refrigerated item or if the previous version for the order before seller revision did not have any refrigerated item then this will be a Read only field. The field will be populated based on shipping option selecting while placing the order.</td></tr>
<tr><td colspan="2">Section 3</td></tr>
<tr><td>Item(s) total</td><td>Value of the order in $ without including shipping.</td></tr>
<tr><td>Shipping charges</td><td>buyer_shipping_fee + additional_buyer_shipping_fee + additional_buyer_pickup_fee - refund_buyer_shipping_fee + additional_fedex_shipping_insurance charged to buyer - refund_fedex_shipping_insurance charged to buyer)</td></tr>
<tr><td>Debit total</td><td>Shipping charges + Item total</td></tr>
<tr><td>Back</td><td></td></tr>
<tr><td>Submit / Cancel Order</td><td>If user marks "Reject" for all items in the order, the button text will beCancel Order.

In all other scenarios, the button text will beSubmit Order.</td></tr>
</table>

Once the user clicks "Submit" button, the following scenarios are possible:

Cancel Order

If the button name is "Cancel Order", the system has to set the status to "Canceled" and display the below message

Order Cancellation Notice

Your order has been canceled

You may reach us at customerservice@matchrx.com
or call 1-877-590-0808.

Submit Order

If the button name is "Submit Order", the system has to set the status to "Pending Seller confirmation" and display the below message

"The seller has been notified and will process the order."

Status = Delivered - Pending Buyer confirmation

Display the below message at the top of the page

Buyer Confirmation: Approve the item(s) received match the line item details in the order by checking Yes or No in the Approved column.

Field Name	Information
	Section 1
Order Number	System Generated
Order Date	System Generated
Approved (for each item) Approve all checkbox to select "Yes" for all items	Yes/No (Default selection is None) If No is selected, a text box is displayed with the message inside the text box "Describe the issue in detail i.e. I received NDC, Lot #, Exp. date or Qty received was xx". The text box is mandatory. The text box will have minimum 1 character and max of 250 characters.

Items in the order listed one below the other	The item details will have the following fields
	• Image
	• Drug Name
	• NDC
	• Lot #
	• Exp Date
	• Price
	• Qty (Field will not be displayed if packaging is partial)
	  ◦ If its a non-revised item, this field will display the qty placed in the original order.
	  ◦ If it is a revised item, this field will display the revised qty.
	  ◦ If the item is marked out of stock or rejected, the item will not be displayed
	• Packaging
	  ◦ If partial,
	    ▪ If its a non-revised item, this field will display the partial qty placed in the original order.
	    ▪ If it is a revised item, this field will display the revised qty
	    ▪ If the item is marked out of stock or rejected, the item will not be displayed.
	  ◦ If full, the field will not be displayed
	• Total
	  ◦ If full pack - Price x Qty available
	  ◦ If partial pack - (Price / partial qty ordered) x partial qty available

Message	Per the MatchRX User Agreement, buyer attests that items are for a specific patient need or purchased during a declared public health emergency.
	Section 2 - Option A - If Approved column is Yes for all items
Shipping Method	Read only
Tracking Number	Hyperlinked to FedEx tracking
Seller Rating	Rating stars will be increment of 1 (min 1, max 5) Comments section will not be displayed by default. It will appear only when the user selects a rating 4 or below.
	Section 2 - Option B - If Approved column is No for at least one item
Shipping method	As provided by webservice
Tracking number	As provided by webservice
Reason for order issue	Options (Incorrect quantity, Incorrect item(s), Packaging issue, Item(s) damaged, Other) - Multi selection is possible. If others is selected, the text box is mandatory. The text box will have minimum 1 character and max of 250 characters.
	Section 3 - Option A - If Approved column is Yes for all items

Item(s) total	Value of the order in $ without including shipping.
Shipping charges	buyer_shipping_fee + additional_buyer_shipping_fee + additional_buyer_pickup_fee **-** refund_buyer_shipping_fee + additional_fedex_shipping_insurance charged to buyer - refund_fedex_shipping_insurance charged to buyer)
Debit total (with ACH date)	Item total + shipping charges
Back	
Submit	Button
Section 3 - Option B - If Approved column is No for at least one item	
Submit Case	Button

Completed Order:

If the buyer marks "Yes" for all items, the order status is changed to "Completed". The financial transaction for seller and buyer (if any refund/charge needs to be done) is generated for MMS to use.

Display the below message:

"Your order is complete."

Continue shopping button

Buyer Revised:

If the buyer marks "No" to one or more items, the order status is changed to "Buyer Revised". No new financial transaction is generated. A case should be generated in Salesforce with Order Number, Buyer Account, Buyer Contact (user who submitted the case) Seller account (all three hyperlinked), Reason for order issue and the NDCs marked as "Yes/No" with text box.

Display the below message in the app

"Your case has been submitted. A customer service representative will contact you for further review. Please reference the order number '{order number} when contacting customer service at 877 590 0808."

Continue shopping button.

Acceptance Criteria:

Pending Seller Confirmation:

1. The user is able select the confirmation status
2. When the user selects "Revise", the app has to show a pop up for user to enter a value
    a. If full pack and ordered qty is 1, the revise option will be disabled.
    b. If full pack and ordered qty "n" is more than 1, the allowed values are between 1 and "n-1" both inclusive.
    c. If it is partial pack and partial qty when ordered is 1, the revise option is disabled.
    d. If it is partial pack and partial qty "n" when ordered is more than 1, the allowed values are between 1 and "n-1" both inclusive.
    e. When qty/partial qty is changed, the Totals should be updated.
3. If the user selects " Out of Stock" for an item, the qty/partial qty and total should be changed to 0.
4. Page 2 has to change based on the confirmation status selected on Page 1.
5. If available is selected for all items in page 1, the user should be able to:
    a. select additional fedex insurance (optional)
    b. Ship date
    c. drop off or pick up time
    d. Apply matchmoney
    e. Download packing checklist and shipping label.

Seller Revised:

1. The page should display the qty and total of revised items with strike-through and new value.
2. The user should be able to select "Accept" or "Reject"
    a. If reject is selected, the qty/partial qty and total field should be updated.
3. If the original order had one or more refrigerated item and the revised order after Page 1 has no refrigerated item as "Accept", then the app should provide the option for buyer to select shipping method.

Delivered - Pending Buyer Confirmation:

1. The user should be able to select "Yes" or "No" for each item
    a. The user should be able to select "Yes" for all items at once.
    b. If "No" is selected, the app should provide a pop up for user to enter the reason. The user should also be able to edit the reason.
    c. If "No" is selected for one or more items, page 2 will have checkboxes and text box to collect the issue regarding the order.
    d. If "Yes" for all items, user will be able to give ratings to the seller on page 2. If 4 or less is selected, a pop up should be displayed to capture the reason for lower rating. The user should be able to edit the reason.

US 40 - Mobile My Orders

WBS #	(see issues table below) 4 issues
Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-221	WBS 157: Mobile - Buy lifecycle [Display pending confirmation purchased items]	May 07, 2018 10:22		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 9
MHX-220	WBS 155: Mobile - Buy lifecycle [Display postings of ordered items with no actions required]	May 07, 2018 10:21		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 9
MHX-180	WBS 156: Mobile Sell lifecycle [Display Sold Items details]	May 07, 2018 10:22		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 9
MHX-176	WBS 149: Mobile Sell lifecycle [Display Postings - Pending Transactions]	May 07, 2018 10:21		Maguesh Balakrishnan	IN QA	Unresolved	Sprint 9

4 issues

Table of Contents

User Story

As a registered user of MRX mobile app, I want the view all my orders so that I can manage my orders

End Objective:	To provide screens for registered users to view and manage their orders

User/Actor:	Primary users and Secondary users of MRX mobile app
Program Type:	Mobile app
Trigger:	Click on "My Orders" Menu
Related User Story:	US 29 - MRX 3.0 My Orders
Related WBS #:	149, 155 - 157

Related WBS description

149	As a pharmacy I want to be able to display postings which I sold and which are pending my confirmation as a list with columns: - "Order number" (order number [links to "Order # XXXXX" site] [look: viewing "Order #XXXXX" site]); - "Order date" (date); - "Product total" (money); - "Ship method" (value from shipping methods dictionary). This is a Summary of the order
155	As a pharmacy I want to be able to display postings which I ordered & are considered open with no action item by the buyer. - Order Number - "Order date" (date); - "Expected delivery date" (date); - "Tracking #" (FedEx tracking number [links to FedEx web page with parcel tracking information); - "Order status" (value from statuses dictionary).
156	As a selling pharmacy user, I want to be able to display postings which I have sold & are considered open with no action item by the seller - Order Number - "Order date" (date); - "Expected delivery date" (date); - "Tracking #" (FedEx tracking number [links to FedEx web page with parcel tracking information); - "Order status" (value from statuses dictionary).
157	As a pharmacy I want to be able to display postings which I purchased and which are pending my confirmation as a list with columns: - "Order number" (order number [links to "Order #XXXXX" site] [look: viewing "Order #XXXXX" site]); - "Order date" (date); - Status (Seller Revised/Delivered) - Delivered date (if delivered)

Order status dictionary

The list of possible statuses for an order are mentioned in US 30 - MRX 3.0 Order Life-cycle - Order Status Dictionary

My Orders

The "My Orders" menu will be on the hamburger menu. The sum of number of orders under the section "Action required" (Sales in Progress & Purchases in Progress) should be displayed as superscript on the "My Orders" menu . The "My Orders" menu will contain the following two tabs.

- Sales in Progress
- Purchases in Progress

Sales in Progress

This tab will have two sub tabs:

- Action Required
- Open Orders

This page will list all the active orders sold by a particular member (even items listed by other users of the same pharmacy) The sum of number of orders under each sub tab should be displayed as superscript. Each card will have the following fields.

In the below table, the fields without "X" means that these fields will not be populated and will remain empty always for orders with the mentioned status. The fields with "X" may or may not be populated.

Field Name / Status type	**1 - Action required sub tab. Status = Pending Seller confirmation**	**2 - Open orders sub tab . Statuses except Completed, canceled & pending seller conf.**	**Information**
Status	X	X	1 - The button Name will named be Confirm Order. 2 - Name of the status - US 30 - MRX 3.0 Order Life-cycle - Order Status Dictionary
Order Number	X	X	
Order Date	X	X	Date on which the order was placed by the buyer
Credit total	X	X	(seller_shipping_fee + seller_pickup_fee + additional_seller_shipping_fee + additional_seller_pickup_fee - refund_seller_shipping_fee) **+** **(**fedex_shipping_insurance + additional_fedex_shipping_insurance - refund_fedex_shipping_insurance) + (mrx_fee – match_money_as_postive_value) - final_item_total
Shipping method	X	X	If the shipping method is 2-day or priority overnight, the text will be in different color.
Tracking Number		X	Hyperlinked tracking number redirecting to Fedex tracking page (opens in new tab in the browser). Received through Fedex API as soon as the seller confirms the order. When status is Seller revised, Tracking number will not be displayed.

Purchases in Progress

This tab will have two sub tabs:

- Action Required
- Open Orders

This page will list all the active orders ordered by a particular member (even items ordered by other users of the same pharmacy) The sum of number of orders under each sub task should be displayed as superscript. Each card will have the following fields.

The fields without "X" means that these fields will not be populated and will remain empty always for orders with the mentioned status. The fields with "X" may or may not be populated.

Field Name / Status type	**1 - Pending seller confirmation (Open orders)**	**2 - Seller revised (action required)**	**3 - Delivered - Pending buyer confirmation (action required)**	**4 - In transit / Pending FedEx Pick-up/ Pending FedEx Drop-off / Pending delivery / Buyer Revised / Return / Exchange (Open orders)**	**Information**
Status	X	X	X	X	1 - Actual Status Name 2 - The field name will be Confirm Revision. 3 - The field name will be Confirm Receipt 4 - Actual status name
Order Number	X	X	X	X	

Order Date	X	X	X	X	Date on which the order was placed by the buyer
Debit total	X	X	X	X	buyer_shipping_fee + additional_buyer_shipping_fee + additional_buyer_pickup_fee - refund_buyer_shipping_fee + additional_buyer_fedex_shipping_insurance - refund_buyer_fedex_shipping_insurance + final_item_total
Delivery date			X	X	Based on the date provided by Fedex API. The date has to be updated frequently through Fedex API When status = Pending seller confirmation or Seller Revised, delivery date number will not be displayed.
Tracking Number			X	X	Hyperlinked tracking number redirecting to Fedex tracking page (opens in new tab). Received through Fedex API as soon as the seller confirms the order. When status = Pending seller confirmation or Seller Revised, tracking number will not be displayed.

Both the tabs will have unlimited scrolling. Default sort - The list will be sorted by the order date. The order with the oldest order date will be at the top.

BR_database

Each order will have a unique order ID. When a order is updated, the history of previous values should be stored in the history field as a JSON script.

Acceptance Criteria

My Order page:

1. The pages have unlimited scrolling
2. All fields are populated with correct values
3. The orders are correctly categorized based on the order status
4. Superscript number is correctly calculated and displayed.

Screen Prototype

MRX-Purchases in Progress-Mobile - v2.pdf

MRX-Sales in Progress-Mobile - V1.pdf

US 41 - VM Product Details

WBS #	<table><tr><th>Key</th><th>Summary</th><th>Updated</th><th>Due</th><th>Assignee</th><th>Status</th><th>Resolution</th><th>Sprint</th></tr><tr><td>MHX-308</td><td>WBS 106: PHP VM Product details</td><td>May 30, 2018 07:07</td><td></td><td>Karthigaichamy Malaimegam</td><td>IN QA</td><td>Unresolved</td><td>Sprint 10</td></tr></table> 1 issue
Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered active buying user of VM website, I want a product details page so that I can know detailed information of the product.

End Objective:	A page providing detailed description of the product
User/Actor:	Registered Primary and Secondary Buying user of MRX 3.0
Program Type:	Web application
Trigger:	When clicked on a product image/drug name in the "Buy" tab.
Related User Story:	US 24 - VM Buy Menu
Related WBS #:	106

Related WBS description:

106	As a buyer I want the application to display additional information about the item: - Item rating (set of icons [look: display Item info icons]; graphical representation of seller rating (0-5 stars, 0,5 star accuracy)); - "Price / Unit (ea)" (Total price; Unit price); - "Qty" (form field (drop-down), which allows to define the quantity to be purchased. Predefined limit); - add to shopping cart icon - Previously Purchased - Shipping options description - List similar items by same or different vendors 1) Title 2) Description 5) Images (Limit 4 in number - Scroll, zoom on click) 7) Return policy (Vendor entered the return policy) 8) UPC if available (no validation) 9) VM Vendor Name 10) Suggested Retail price 11) Promotion: Yes/No Promo Price: As a % and Price Duration of the promo: End Date

Business Rules

When a user clicks on the product image/card on the "Buy" page, the system should open a new page (not pop up) with the following details.

Refer US 24 - VM Buy Menu to get details about the various fields mentioned below.

Item Details

1. Product Name
2. Primary Category > Secondary Category > Tertiary Category (All three hyperlinked. When clicked, the product details pop up closes and category buy page should be displayed.)
3. UPC (hyperlinked. When clicked, the buy page should be displayed with results of search using the UPC number)
4. Description
5. Price (When the buyer changes the qty, the system has to check the quantity discount table. If there is a applicable discount, the price has the display the discounted price per unit)
6. Suggested Retail Price
7. Sale Promo tag (if Sales promo is active)
8. Sale price (if Sales promo is active)
9. Sale Promo description (if Sales promo is active)
10. Minimum Order Quantity
11. Maximum Order Quantity (If set as 0 by seller, display "Unlimited")
12. Quantity Discount table (If Quantity Discount method is active - Refer US 34) (The system has to calculate and show the price per unit

value)
13. Returns Allowed (Yes/No)
14. Return Policy description (If Returns allowed is Yes)
15. Ships within "XX" days
16. Free Shipping (Yes/No)
17. Shipping fee per shipping box
18. Max qty per shipping box
19. Images
20. Seller DBA (hyperlinked. When clicked, the buy page should filter and show the seller's items)
21. Add to cart
22. Add/remove from Favorite
23. Back button

Compare Prices & Seller's Other items

Compare Prices - This tab will list all the live postings in the marketplace which have the same UPC.

Seller's other items - This tab will list all the live postings in the marketplace posted by the same seller.

Both the tabs will have the following fields

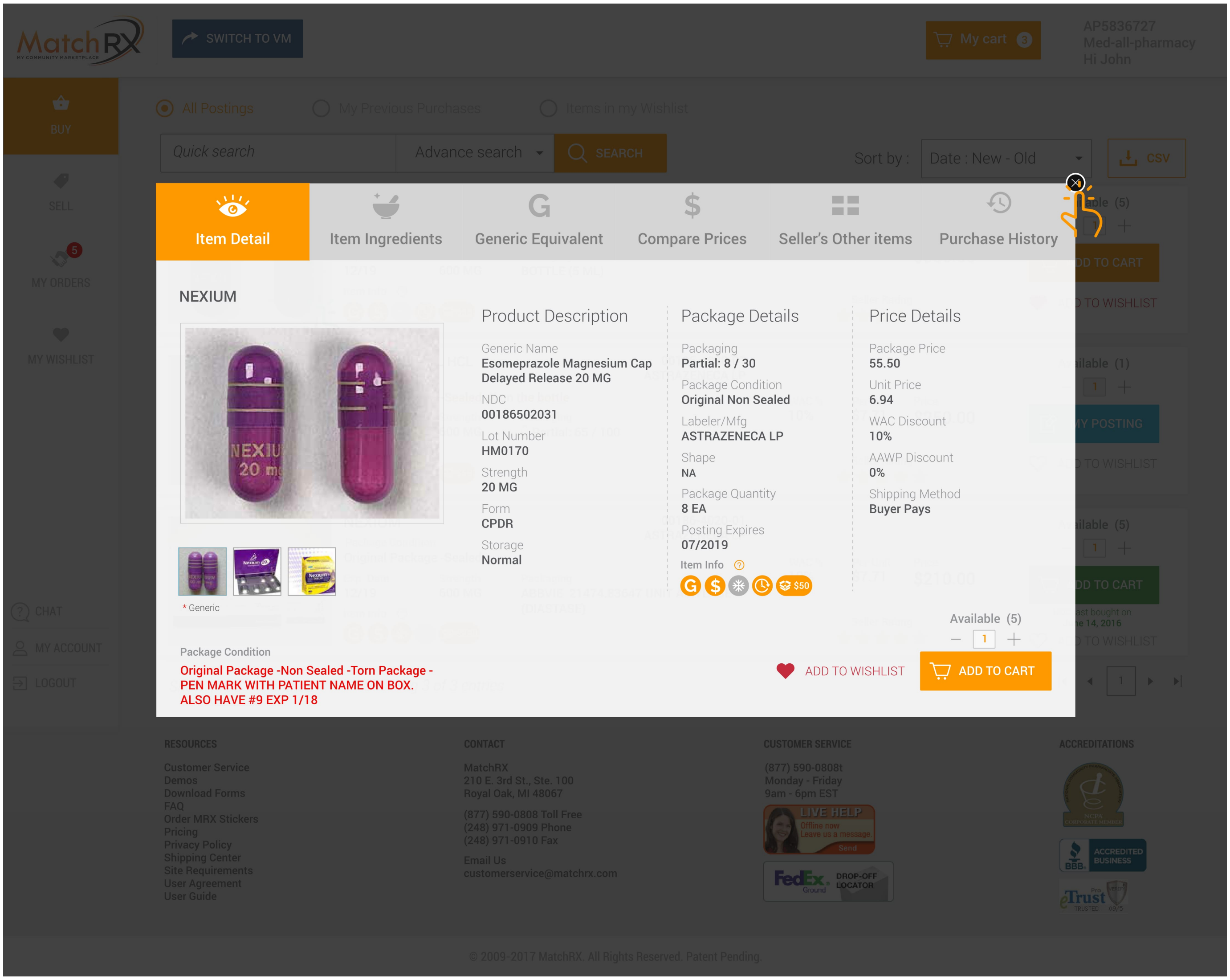
1. Product Name
2. Price (Two prices possible when the item is on sale. Original and Sale price)
3. MSRP (Suggested Retail Price)
4. Images - On rollover, the second image should be shown, if available
5. Shipping (Display it next to price only if it is Free shipping)
6. Promotion (If yes, a tag on top of the image with text "Sale")
7. Add/Remove from Wishlist
8. "last bought on" (if available)

The items in the tab will be sorted by the lowest price. Inside the tab, the user will not have the pre-defined filter such as "Popular Product", New Product" and "clearance" available.The tab should have unlimited scrolling. If there is no posting in the marketplace to be shown in these tab, the tab should be disabled and greyed out (but should be visible).

Acceptance Criteria:

1. All fields are correctly displayed.
2. Fields under each tab is correctly populated.
3. Add/Remove wishlist works correctly

Screen Prototype



US 42 - VM Cart & Checkout page

WBS #

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-311	WBS 112: VM Shopping Cart Sign in all pages	May 31, 2018 09:43		Senthil Vasan	IN QA	Unresolved	Sprint 9
MHX-310	WBS 111: VM Shopping Cart	Jul 09, 2018 18:56		Senthil Vasan	IN QA	Unresolved	Sprint 9
MHX-144	WBS 114: VM Checkout	May 31, 2018 09:44		logesh.karthikeyan@htcindia.com	IN QA	Unresolved	Sprint 9
MHX-143	WBS 113: VM Shopping Cart[Full shopping cart details]	May 31, 2018 09:43		Senthil Vasan	IN QA	Unresolved	Sprint 9

4 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	

QA	

Table of Contents

User Story

As a registered active buyer user of VM website, I want a shopping cart widget so that I can preview items in my cart and a checkout page so that I can review and place the order.

End Objective:	To provide shopping cart widget and checkout page
User/Actor:	Registered Primary and Secondary buyer user of VM
Program Type:	Web application
Trigger:	Cart icon on the header should show the shopping cart. A button in the cart should open the checkout page
Related User Story:	
Related WBS #:	111 - 114

Related WBS description:

111	shopping cart is unique to the user but Order history, manage orders, wishlist should be common to the organization/entity (all users associated with the pharmacy).
112	As a buyer I want to see the a shopping cart sign on all sites and pages, as long as I am logged in: - Number of items in the shopping cart.
113	As a buyer I want to see full shopping cart details: - list of items items added to shopping cart item name quantity item price Extended value vendor (grouped per shipping method per vendor inside the cart view) e.g. Three Suborder Vendor 1 - Ground Shipping Item A Vendor 1 - 2 day shipping Item B Vendor 2 - 2 day shipping Item C - total value of the cart; - checkout button. - option to remove items from cart - option to change item quantity - Change shipping method - Select/Change/Add (CC only) payment method - CC will be Zeamster integration. - If buyer wants to add ACH payment, the buyer is taken to a different page to upload the ACH form. If the buyer decides to purchase with CC, they will be still be able to checkout but if they want to purchase with ACH, they will have to wait for the ACH to be approved by BO user. Te items in cart are not guaranteed while the user waits for approval.
114	As a buyer I want a "checkout" button to start processing my shopping cart towards an order. Since that moment the order has been place, A master order number should be generated for the whole order in the cart and a suffix has to be added to the master order for different sub orders [1 order ID per shipment per Vendor]. CC is authorized at checkout, not charged. When the seller marks the order as shipped, CC is charged.

Business Rules

Shopping cart

The term item and product are interchangeably used. Both mean the same.

The shopping cart icon should be available on the header on all pages as long as the user remains logged in. The shopping cart should always display the quantity (not the number of unique products) currently in the cart. When the user is in MRX 3.0, the shopping cart will be specific to MRX 3.0. Items added in VM will not be found in this shopping cart. Similarly, when the user is in VM, the shopping cart will be specific to VM and the items added in MRX 3.0 will not be found in the cart.

The shopping cart will be specific and unique to the user of the pharmacy. If user 1 of Pharmacy A adds an item to the cart, another user 2 of same pharmacy A will not have that item in his/her cart.

~~Once an item has been added to the cart, the quantity ordered will be reserved for the particular user till the user removes the item from the cart or 12 hours from the time it was added, whichever is earlier.~~

The shopping cart should display the following information when the user clicks:

- Seller '{Seller's DBA} 1:
    1. Product Name
        a. Image
        b. Quantity ordered (with ability to edit qty)
        c. Price
        d. Product total (Quantity ordered x price)
    2. Product Name:
        a. Image
        b. Quantity ordered (with ability to edit qty)
        c. Price
        d. Product total (Quantity ordered x price)
    3. Seller Total (sum of Product total for Product A and Product B)
- Seller '{Seller's DBA} 2:
    1. Product Name
        a. Image
        b. Quantity ordered (with ability to edit qty)
        c. Price
        d. Product total (Quantity ordered x price)

and so on.

- Cart Total (sum of Seller DBA 1 Total and Seller DBA 2 Total)

The shopping cart will also have a checkout button.

If the user hasn't added any item to the cart, the shopping cart will be empty with the message "Your shopping cart is empty".

Checkout Page

When the user clicks on checkout button on the shopping cart widget, the system should load the checkout page with the following information. Items sold by the same seller is grouped as one order. ~~The Buy Menu on the left navigation pane should not be active (should not be filled with Orange).~~

Once an item has been added to the cart, the quantity added will NOT be reserved for the particular user. It will be available for everyone else in the buy marketplace to purchase. When the user clicks on "Submit Order" in the checkout page, the system has to check the quantity requested in the order and quantity available. If requested quantity is not available, the order should not proceed and the following message should be displayed "Item(s) in your cart have changed/removed. Please review and submit order again". The checkout page should be updated with the latest quantity available. If a particular item has no quantity available, the item has to be removed from the checkout page. If all items are removed from the checkout page, display the message "The seller(s) has informed us that the item(s) is no longer available".

Order Information Sections

- Shipping address
    - Drop-down to select the saved shipping address. Default selection will be the default shipping address in the Shipping address section of My Account page
    - Link to shipping address under "My accounts" to add/edit/delete shipping addresses.
- Seller A `{seller's DBA} : (Hyperlink - The user should be taken to Buy marketplace and shown this Seller all items)
    1. Item #1 (hyperlink to Product details page - US 41 - VM Product Details)
        a. Product Name

    b. Image
    c. UPC
    d. Sales Promo tag
    e. Suggested Retail Price
    f. Price (if sales promo is active, strike Price and display sale price). Amount and % saved should be displayed.
    g. Returns Allowed
    h. Return Policy description
    i. Ships within
    j. Add/remove from Favorite
    k. The user should be able to edit quantity. Available qty should be displayed.
    l. "Remove from cart" icon
    m. Product total (Quantity ordered x price)
    n. Shipping method selection (Placeholder for GoShippo)
    o. Shipping fee displayed based on selection
2. Items #2 (hyperlink to Product details page - US 41 - VM Product Details)
    a. Product Name
    b. Image
    c. UPC
    d. Sales Promo tag
    e. Suggested Retail Price
    f. Price (if sales promo is active, strike Price and display sale price). Amount and % saved should be displayed.
    g. Returns Allowed
    h. Return Policy description
    i. Ships within
    j. Add/remove from Favorite
    k. The user should be able to edit quantity. Available qty should be displayed.
    l. "Remove from cart" icon
    m. Product total (Quantity ordered x price)
    n. Shipping method selection (Placeholder for GoShippo)
    o. Shipping fee displayed based on selection
3. Item total (sum of Product total for item #1 and item #2)
4. Shipping total (sum of shipping fee for item #1 and item #2)
5. Total - Seller DBA (sum of item total and shipping total)
6. Purchase order number (min 0, max 50, varchar, optional)
7. Special instructions (min 0, max 150, varchar, optional)

- Seller B`{seller's DBA} : (Hyperlink - The user should be taken to Buy marketplace and shown this Seller all items)
    1. Item #1 (hyperlink to Product details page - US 41 - VM Product Details)
        a. Product Name
        b. Image
        c. UPC
        d. Sales Promo tag
        e. Suggested Retail Price
        f. Price (if sales promo is active, strike Price and display sale price). Amount and % saved should be displayed.
        g. Returns Allowed
        h. Return Policy description
        i. Ships within
        j. Add/remove from Favorite
        k. The user should be able to edit quantity. Available qty should be displayed.
        l. "Remove from cart" icon
        m. Product total (Quantity ordered x price)
        n. Shipping method selection (Placeholder for GoShippo)
        o. Shipping fee displayed based on selection
    2. Items #2 (hyperlink to Product details page - US 41 - VM Product Details)
        a. Product Name
        b. Image
        c. UPC
        d. Sales Promo tag
        e. Suggested Retail Price
        f. Price (if sales promo is active, strike Price and display sale price). Amount and % saved should be displayed.
        g. Returns Allowed
        h. Return Policy description
        i. Ships within
        j. Add/remove from Favorite
        k. The user should be able to edit quantity. Available qty should be displayed.
        l. "Remove from cart" icon
        m. Product total (Quantity ordered x price)
        n. Shipping method selection (Placeholder for GoShippo)
        o. Shipping fee displayed based on selection
    3. Item total (sum of Product total for item #1 and item #2)
    4. Shipping total (sum of shipping fee for item #1 and item #2)
    5. Total Seller DBA (sum of item total and shipping total)
    6. Purchase order number (min 0, max 50, varchar, optional)

7. Special instructions (min 0, max 150, varchar, optional)

- Grand Total (sum of Seller DBA 1 Total and Seller DBA 2 Total). When only one seller is in the checkout page, don't display the seller's total and only display the grand total. If more than one seller is in the checkout page, display each seller's total and the grand total.
- Payment method (Radio button - ACH & Credit Card. Default will be credit card) - This section should follow the rules mentioned in US 6 - Payment section. If the grand total causes the member to exceed the ACH credit limit based on the membership group, the system should display the message "You have exceeded your credit limit. Please use your credit card to complete purchase or contact customer service at 877 590 0808 " and deactivate ACH option. Debit total of any VM and MRX 3.0 order with status other than completed or canceled should be considered for the ACH credit limit calculation.
    - ACH - Display bank name and last 4 digits of the account number (Read only). If "disable ACH payment in Vendor Marketplace" checkbox in payment section of "My account" is checked, ACH method will be disabled for all users.
    - Credit card
        - Drop-down to select the saved credit card. Both primary and secondary users can use a saved card. Default card found in payment section of "My account" section should be the default selection.
        - Ability for a primary user to use a new credit card and optionally save it if the total number of cards saved by the pharmacy is less than 5 cards.
        - Ability for the primary user to use a new credit card without saving the card.
        - Ability for a secondary users to use a new credit card but secondary user will not have the option to save.
- Message: Placeholder to have a text message to be added later.
- Submit order

Maximum number of sellers per shopping cart is 5. This should be part of the config file so that MatchRX IT team can change the number later.

Shipping

Before GoShippo implementation:

1. If the seller has selected as free shipping for a particular item, the shipping fee for that item will be $0 and the text "free" will be mentioned.
2. If the seller has not selected free shipping for the item, the database will have the shipping fee per box and max qty per shipping box for the item. Based on the qty in the cart, the system has to calculate the shipping fee and display.

    For example, if the seller has posted

    Item Name: Pen

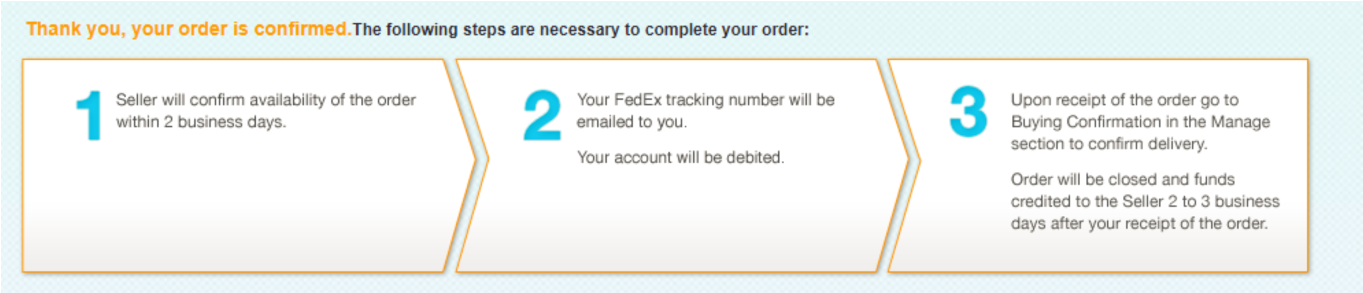
    Shipping fee per box: $10

    Max qty per shipping box: 100

Qty placed in the cart by the buyer	Shipping fee for the qty in the cart
1	$10
100	$10
101	$20
200	$20
201	$30
and so on.	

Order Summary:

Once the user places an order, the UPCs in the order should be automatically add to the "My favorites". If an items doesn't have the UPC, the item will not be added to "My favorites". The system should load the next page with below details.



- Seller `{seller's DBA} 1:
    - Order Number (Hyperlinked to Order details page)
    - Item #1
        1. Product Name
        2. UPC
        3. Price (if sales promo is active, display sale price. Else display normal Price)
        4. Quantity
        5. Product total (Quantity ordered x price)
        6. Shipping method selected (Placeholder for GoShippo)
        7. Shipping fee
    - Items #2
        1. Product Name
        2. UPC
        3. Price (if sales promo is active, display sale price. Else display normal Price)
        4. Quantity
        5. Product total (Quantity ordered x price)
        6. Shipping method selected (Placeholder for GoShippo)
        7. Shipping fee
    - Item total (sum of Product total for item #1 and item #2)
    - Shipping total (sum of shipping fee for item #1 and item #2)
    - Total - Seller DBA (sum of item total and shipping total)
- Seller `{seller's DBA} 2 :
    - Order Number (Hyperlinked to Order details page)
    - Item #1
        1. Product Name
        2. UPC
        3. Price (if sales promo is active, display sale price. Else display normal Price)
        4. Quantity
        5. Product total (Quantity ordered x price)
        6. Shipping method selected (Placeholder for GoShippo)
        7. Shipping fee
    - Items #2 (hyperlink to Product details page - US 41 - VM Product Details)
        1. Product Name
        2. UPC
        3. Price (if sales promo is active, display sale price. Else display normal Price)
        4. Quantity
        5. Product total (Quantity ordered x price)
        6. Shipping method selected (Placeholder for GoShippo)
        7. Shipping fee
    - Item total (sum of Product total for item #1 and item #2)
    - Shipping total (sum of shipping fee for item #1 and item #2)
    - Total - Seller DBA (sum of item total and shipping total)
- Payment method (ACH/Credit Card)
- ~~Text - "MatchRX will debit bank account `{Bank Name}' - '{last 4 digits of bank account number} / Credit card '{VISA/Master/Discover/AMEX} - '{last 4 digits of the credit card number} for each order separately when confirmed by the seller."~~
- Button - 'Continue Shopping'

Acceptance Criteria:

Shopping cart widget & Checkout page:

1. The shopping cart correctly displays the quantity (not the number of unique NDCs) currently in the cart.
2. If the user hasn't added any item to the cart and clicks the shopping cart icon, the shopping cart widget will be empty with the message "Y our shopping cart is empty".
3. On checkout page, Items sold by the same seller is grouped as one order. Max of five sellers should be allowed per checkout page.
4. Each seller should have a Hyperlink. When clicked, the user should be taken to Buy marketplace and shown Seller's all items
5. Fields mentioned in Business rules section should be correctly displayed.

Order Summary:

1. All fields & buttons are displayed as mentioned in the user story
2. Order number is hyperlinked to the My order page

Update log:

Added two field (Purchase order & Special instructions) on April 19

US 43 - VM My Favorites

WBS #	<table><tr><th>Key</th><th>Summary</th><th>Updated</th><th>Due</th><th>Assignee</th><th>Status</th><th>Resolution</th><th>Sprint</th></tr><tr><td>MHX-133</td><td>WBS 110: PHP VM Favourite List</td><td>May 30, 2018 07:07</td><td></td><td>Karthigaichamy Malaimegam</td><td>IN QA</td><td>Unresolved</td><td>Sprint 10</td></tr></table> 1 issue
Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered buyer user of VM, I want the ability to view and delete the items (based on posting ID) that I have added to the favorite list

End Objective:	To provide a page for registered users to view favorite items
User/Actor:	Primary users and Secondary buyer users of VM
Program Type:	Web
Trigger:	Click on "My Favorites" Icon on left bar
Related User Story:	
Related WBS #:	110

Related WBS description

110	Items in my Favorites list As a buyer I want to have a favorites list. - List of items in Grid similar to buy home page - When click on an item, the buyer is directed to the product page. - If the item is no longer available, the user is prompted to remove on click. - Ability to add to cart. * "Remove from wishlist" button. Order history, manage orders, wishlist should be common to the organization/entity

Business Rules

My Favorites

This page will list all the items that have been added to the favorite list by any user of a member pharmacy in a grid. The items listed in this page are vendor specific. The grid will have the following fields.

Field Name	Rules
☐ (Check box)	Selection - User can check/uncheck to select the favorite item. The user should be able to select all items on the page by click on the check box in the header. When the header check box is checked, the system should display the number of items selected and also provide an option to select all items (across all pages)in the favorite list.
Image	The system has to store and display the image even if the posting is no longer available in the marketplace. Only the main image should be displayed.
UPC #	If available, hyperlinked. When user clicks on the UPC #, the system should search the buy marketplace with the UPC #
Product Name	Hyperlinked. When user clicks on the product name, the system should search the buy marketplace with the product name
Seller Name	Hyperlinked. When user clicks on the seller name, the system should search the buy marketplace with the seller name
Available Qty	Mentions the quantity (not the number of postings) available in the marketplace for the particular posting ID. If another vendor is selling the same item (item name/UPC), the system should not consider those in calculating the available qty.
Favorite Date	Read only field. Date on which the item was added to the favorite
Trash can icon	Delete action button to delete the favorite item. A warning message should be provided to confirm deletion.

~~Above the grid, the page will have the message "A summary email will be sent every morning listing all of your wishlist items posted the previous date."~~

By default, the items will be sort by date added to favorites (newest item added on top).

The user should be able to

1. Select multiple items
2. Sort using all the above fields across all pages. The user should be able to sort based on check box field as well.
3. Options to select all items (display number of items selected), select none and delete selected items
4. Add a product to the favorite list for the buy marketplace (only if the product is available in the marketplace currently) or from the order details page.

The page should have pagination at the bottom of the page

- "number of items per page" drop-down menu (10/25/50/100/200 items per page) - Default value 100
- navigation between pages
- sum-up ("X to YYY. Page A of B.").

Acceptance Criteria

My favorite list page:

1. The user is able to sort the favorite list using all the fields
2. The user is able to sort based on check box field
3. The user is able to select multiple items and delete
4. The user is able to select all items and select none

US 44 - BO Pharmacy Reports

WBS #	

Key	Summary	Updated	Due	Assignee	Status	Sprint
MHX-257	WBS 217: BO - MRX Reports and Statistics	Apr 19, 2018 10:31		Swapna.Patnaikuni	DEVELOPMENT	Sprint 9
MHX-232	WBS 203: BO - 3.0 Summary Activity info by member as BO User	Apr 26, 2018 10:21		Swapna.Patnaikuni	DEVELOPMENT	Sprint 9

2 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a back office user of MatchRx, I want the ability to run reports so that I can export to xls format and perform analysis

End Objective:	To provide the ability to run different reprts
User/Actor:	Back office users of MatchRX
Application:	Salesforce
Trigger:	
Related User Story:	

Related WBS Description:

203	As a BO user, I want to view a snapshot of activity by member with the following search filters: - Sales Rep (selected or All) - Activity date from : to - ACH date (membership date) from : to - Member status (Any, active, canceled, suspended, active & suspended) - Export results to CSV file Results displayed: - Account Rep - Pharmacy DBA - Pharmacy Status - DEA - State - Primary Contact & Phone - ACH Date - Last login date - Last Post date - Last Buy date - Last Sell date - # of Current Posts - # of Lifetime Posts - Total Sales (within activity date range) - Total Selling Fees (within activity date range) - Total Match Money Earned (within activity date range) - Total Match Mondy Used (within activity date range) - Total Sales (within activity date range) - Total Purchases (within activity date range) - Total Postings (within activity date range) This is already in place in MRX 2.0. Salesperson can only view activity for their own members with a lookback of 13 months. Management can view activity across all members and dates.
217	As MRX I want to display a monthly revenue report as a list (one month = one row) with columns: As MRX I want to display a daily revenue report as a list (one day = one row) with columns: - Date; - Total orders; - Orders amount; - MRX Fee; - FedEx fee; - Fee total; - Items total. I want to: - export the report to XLS/CSV; - print the report.

Business Rules

Admin Dashboard Report

Only the BO user with Admin user role will be able to run this report. The report will include all order statuses and posting statuses.

The BO user should be able to select

- The activity date range (mandatory). The default date range will be 1st of current month to current date of current month.
- The membership date range (mandatory). The default date range will be Feb 1 2010 to current date.
- Sales Rep/Utilization Manager Name (mandatory). The default will include all sales rep and utilization manager. The user will be able to select multiple.
- Membership status (mandatory). The default will include all status. The user will be able to select multiple.

The report will have the details found in the attached file.

US 44_ Admin Dashboard Report.xlsx

Sales Rep Dashboard Report

The BO users with sales rep and utilization manager will be able to run this report. A sales rep/utilization manager report will only contain the

Pharmacies that are currently assigned to the user. A Sales rep/Utilization manager will only be able to run his/her own report. A Sales rep/Utilization manager will not be able to run other BO user's report. The report will include all order statuses and posting statuses.

The BO user should be able to select

- The activity date range (mandatory). The default date range will be 1st of current month to current date of current month.
- The membership date range (mandatory). The default date range will be Feb 1 2010 to current date.
- Membership status (mandatory). The default will include all status. The user will be able to select multiple.

The report will have the details found in the attached file.

US 44_ Sales Rep Dashboard Report.xlsx

Sales Rep:

The max activity and membership date range will be the previous 13 calendar months including current month. Rep will be able to select a custom date range within the 13 months.

Example: Current date is April 13, 2018. The range available for selection is March 1, 2017 to April 13, 2018.

Utilization Manager:

No max activity or membership date range restrictions for utilization manager.

Revenue Reports

Only Admin and Accountant user role will have access to this report. A BO user should be able to run two reports (daily report & monthly report) with the following fields

1. Number of orders
2. Item total of all orders
3. Total of MatchRX fee
4. Total of MatchMoney used by sellers
5. Total of Shipping fee paid by buyers and sellers
6. Sum of 3, 4 and 5 above
7. Total number of items sold (If an order contains an NDC with qty 3, it is considered as 1 item sold)
8. Total quantity sold (If an order contains an NDC with qty 3, it is considered as 3 quantity sold)

This report will have the following filters:

1) Order Status (Mandatory): Default will be all. Multiple statuses can be selected.

2) Date Range (Unlimited) (Mandatory)

3) Membership status (mandatory). The default will include all status. The user will be able to select multiple.

Please refer Pearl Accounting Revenue Report / Monthly Revenue Report for better understanding.

US 45 - VM Seller My Orders

WBS #	Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
	MHX-304	WBS 93: PHP VM Search by order #	May 21, 2018 07:54		Senthil Vasan	IN QA	Unresolved	Sprint 10
	MHX-302	WBS 97: PHP VM Sell History - Completed Orders	May 21, 2018 07:56		logesh.karthikeyan@htcindia.com	IN QA	Unresolved	Sprint 10
	MHX-211	WBS 91: PHP VM - Orders list	May 21, 2018 07:54		Senthil Vasan	IN QA	Unresolved	Sprint 10
	3 issues							
Document status	APPROVED							

Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered seller user of VM application, I want the view all my orders so that I can manage my orders

End Objective:	To provide a page for registered VM seller to view and manage their orders
User/Actor:	Primary users and Secondary users of VM seller application
Program Type:	Webpage
Trigger:	Click on "My Orders" Menu
Related User Story:	
Related WBS #:	91, 93, 97

Related WBS description

91	As a vendor I want to be able to display my postings which are in a lifecycle with columns: - "View order" (order number [links to order details] [LOOK: viewing order details]); - Order status Pending vendor confirmation In Process (after Vendor Acceptenace) Pending Vendor Settlement (when tracking number is uploaded. Max of 5 tracking numbers can be added) Settlement (Payment) - "Order date" (date); - "Order total" (money); - "Shipping method" (value from shipping methods dictionary) (if multiple shipments, text "multiple") - "Shipping date" (date); (if multiple shipments, text "multiple") - "Tracking #" (Max of 5 tracking numbers can be added.if multiple shipments, text "multiple")
93	As a Vendor i want to be able search the order by criteria like order #, date, Buyer, product within all my orders. This feature should be available in Open orders, Buy history, Sell history in Orders tab.

97	Orders tab -> Sell History As a vendor, I want to be able to display orders which were sold by me and completed as a list with columns: - "View invoice" (order number [link to invoice]; - "Order date" (date); - "Seller confirmed" (date); - "Product total" (money); - "Shipping total" (money); - "MRX Fee" (money) - "Credit total" (money); - "Shipping method" (value from shipping methods dictionary) - "Shipping date" (date); - "Tracking #" (FedEx tracking number [links to FedEx web page with parcel tracking information); - "ACH credit date" (value from statuses dictionary). Canceled orders will also be listed here.

Order status dictionary

The list of possible statuses for an order are mentioned in US 47 - VM Order Flowchart

My Orders

The "My Orders" menu will be on the left pane on all pages once logged in. The sum of number of orders under the section "Action required" (In Progress) should be displayed as superscript on the "My Orders" menu . The "My Orders" menu will contain the following two tabs.

- In Progress
- History

In Progress

This page will list all the active orders sold by a particular member (even items listed by other users of the same wholesaler). Active orders are orders with any status in the Order dictionary other than complete or canceled. the page is further divided into two sub tabs

- Action Required
- Open Orders

Sorting:

By default, the orders with status "Pending seller acceptance" should always be at the top and all order should be sorted from oldest order date to the earliest. ~~There should be three stages of sorting for all fields. The third stage will be default sort.~~

Action Required

The orders with the following statuses will be part of this sub tab.

1. Pending Seller Acceptance
2. Pending Fulfillment
3. Partially Fulfilled

The grid will have the following fields.

The fields without "X" means that these fields will not be populated and will remain empty always for orders with the mentioned status. The fields with "X" may or may not be populated.

Field Name / Status type	1 - Pending Seller Acceptance	2 - Pending Fulfillment	3 - Partially Fulfilled	Information
Action/Status	X	X	X	1 - Button hyperlinked to the order details page. The button Name will be "Accept Order" 2 - Button hyperlinked to the order details page. The button Name will be "Add Tracking" 3 - Button hyperlinked to the order details page. The button Name will be "Add More"
Order Number	X	X	X	Hyperlinked to the order details page
Order Date	X	X	X	Date on which the order was placed by the buyer

Ship Method	X	X	X	Shipping Method selected by the buyer when order was placed. If manual (shipping fee per box) method is selected, the method will be called "Seller method". If the order has different shipping methods, the field will have the text "Multi"
Ship total	X	X	X	Shipping fee paid by the buyer
Credit total	X	X	X	
Ship Date		X	X	1 - The field will be blank 2 - The field will have the date selected by the seller as "Expected shipping date" during "Seller Acceptance" process. If the "expected shipping date" is in the past (based on EST), the field will display the text "Past due" 3 - If the seller added tracking numbers only once, this field will have the most recent date on which the seller added the tracking number. If the seller added tracking number more than once, the text "Multi" will be displayed.
Tracking Number			X	Tracking number with shipping carrier name will be displayed. If more than one tracking number is provided by the seller, the text "Multi" will be displayed.

Open Orders

The orders with the following status will be part of this sub tab.

1. In-Transit
2. Delivered - Pending Buyer Confirmation
3. Pending Seller Settlement
4. Open Case
5. Return
6. Exchange

The grid will have the following fields.

The fields without "X" means that these fields will not be populated and will remain empty always for orders with the mentioned status. The fields with "X" may or may not be populated.

Field Name / Status type	**1, 2 - In-transit / Delivered - Pending Buyer Confirmation**	**3 - Pending Seller Settlement**	**4 - Open case**	**5, 6 - Return / Exchange**	**Information**
Action/Status	X	X	X	X	Actual status name
Order Number	X	X	X	X	Hyperlinked to the order details page
Order Date	X	X	X	X	Date on which the order was placed by the buyer
Ship Method	X	X	X	X	Shipping Method selected by the buyer when order was placed. If manual (shipping fee per box) method is selected, the method will be called "Seller method". If the order has more than one shipping method, the field will have the text "Multi"
Ship total	X	X	X	X	Shipping fee paid by the buyer
Credit total	X	X	X	X	
Ship Date	X	X	X	X	The field will have the date on which the seller added the tracking number. If the seller added the tracking number only once, the actual date will be mentioned. If the seller added/edited the tracking number more than once, the text "Multi" will be displayed.
Tracking Number	X	X	X	X	Tracking number with shipping carrier name will be displayed. If more than one tracking number is provided by the seller, the text "Multi" will be displayed.
Settlement Date		X	X	X	3 - Date on which the ACH for this order is expected to be processed by MMS. 4, 5, 6 - If the ACH was NOT processed by MMS, then this field will be empty. If the ACH was already processed, this field will display the date on which the most recent ACH was processed by MMS.

Sell History

This section will contain orders sold by the member and has the status complete (seller) / canceled. . Default sort will be Order date (most recent at top).

The page is further divided into two sub tabs

1. Completed
2. Canceled

The grid will have the following fields.

The fields without "X" means that these fields will not be populated and will remain empty always for orders with the mentioned status. The fields with "X" may or may not be populated.

Field Name / Status type	1 - Completed	2 - Canceled	Information
Order Number	X	X	Hyperlinked to the order details page
Order Date	X	X	Date on which the order was placed by the buyer
Shipping Method	X	X	1 - Shipping Method selected by the buyer when order was placed. If manual (shipping fee per box) method is selected, the method will be called "Seller method". If the order has more than one shipping method, the field will have the text "Multi". 2 - Shipping Method selected by the buyer when order was placed. If manual (shipping fee per box) method is selected, the method will be called "Seller method". If the order has more than one shipping method, the field will have the text "Multi". If the order is canceled before tracking number is added, the field will be blank.
Ship total	X	X	Shipping fee paid by buyer.
Credit total	X	X	
Ship Date	X	X	1 - The field will have the date on which the seller added the tracking number. If the seller added the tracking number only once, the actual date will be mentioned. If the seller added/edited the tracking number more than once, the text "Multi" will be displayed. 2 - The field will have the date on which the seller added the tracking number. If the seller added the tracking number only once, the actual date will be mentioned. If the seller added/edited the tracking number more than once, the text "Multi" will be displayed. If the seller never added a tracking number, the field will be blank
Tracking Number	X	X	1 - Tracking number with shipping carrier name will be displayed. If more than one tracking number is provided by the seller, the text "Multi" will be displayed. 2 - Tracking number with shipping carrier name will be displayed. If more than one tracking number is provided by the seller, the text "Multi" will be displayed. If the seller never added a tracking number, the field will be blank
Settlement Date	X	X	1 - Date on which the most recent ACH for this order was processed by MMS. 2 - Date on which the most recent ACH for this order was processed by MMS. If there is a pending ACH to be processed by MMS, the scheduled date will be displayed. If neither of the mentioned scenario, this field will be blank.

Order Search & Pagination

The user should be able to search an order based on

- Product name
- UPC #
- Seller SKU ID
- Order #

If the user uses Product name / UPC / Seller SKU ID, the results should contain orders which contain the product name / UPC / Seller SKU ID relevant to search term.

Pagination

- "number of orders per page" drop-down menu (10/25/50/100/200 items per page) - Default value 100
- navigation between pages
- sum-up ("X to YYY. Page A of B.").

BR_database

Each order will have a unique order ID. When a order is updated, the history of previous values should be stored in the history field as a JSON script.

Acceptance Criteria

My orders page:

1. The user is able to sort the orders
2. The user is able to search based on UPC, Seller SKU ID and product name
3. All fields are populated with correct values (based on formulas/logic mentioned)
4. The orders are correctly categorized based on the order status

US 46 - VM Buyer My Orders

WBS #

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-304	WBS 93: PHP VM Search by order #	May 21, 2018 07:54		Senthil Vasan	IN QA	Unresolved	Sprint 10
MHX-216	WBS 118: PHP VM - See orders "completed"	May 21, 2018 07:56		logesh.karthikeyan@htcindia.com	IN QA	Unresolved	Sprint 10
MHX-214	WBS 116: PHP VM - Orders list[Open Orders]	May 21, 2018 07:56		logesh.karthikeyan@htcindia.com	IN QA	Unresolved	Sprint 10

3 issues

Document status	APROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered buyer user of VM application, I want the view all my orders so that I can manage my orders

End Objective:	To provide a page for registered VM buyers to view and manage their orders
User/Actor:	Primary users and Secondary users of VM Buyer application
Program Type:	Webpage

Trigger:	Click on "My Orders" Menu
Related User Story:	
Related WBS #:	93, 116, 118

Related WBS description

93	As a Vendor i want to be able search the order by criteria like order #, date, Buyer, product within all my orders. This feature should be available in Open orders, Buy history, Sell history in Orders tab.
116	Order Tab -> Open orders Buy Orders As a pharmacy I want to be able to display orders which were purchased by me and are in process as a list with columns: - "View order" (order number [links to order details] [LOOK: viewing order details]); - "Order date" (date); - "Product total" (?, money); - "Shipping total" (money); - Total Order value (money) - "Shipping method" (value from shipping methods dictionary) - "Order status" (value from statuses dictionary includes open return/exchange). All users can view and manage the orders placed by all the users of a particular pharmaxy (entity) As a buyer i want to be able search the order by criteria like order #, date, vendor, product within all my orders
118	Order tab - > Buy history As a pharmacy I want to be able to display orders which I placed and completed as a list with columns: - "Order Number" (order number [link to order details]); - "Order date" (date); - "Product total" (money); - "Shipping total" (money); - Order total" (money); - "Shipping method" (value from shipping methods dictionary) - "Shipping date" (date); - "Tracking #" (FedEx tracking number [links to FedEx web page with parcel tracking information) Canceled orders will also be listed here. As a buyer i want to be able search the order by criteria like order #, date, vendor, product within all my orders

Order status dictionary

The list of possible statuses for an order are mentioned in US 47 - VM Order Flowchart

My Orders

The "My Orders" menu will be on the left pane on all pages once logged in. The "My Orders" menu will contain the following two tabs.

- In Progress
- History

In Progress

This page will list all the active orders bought by a particular member (even items bought by other users of the same pharmacy). Active orders are orders with any status in the Order dictionary other than complete or canceled.

the page is further divided into two sub tabs

- Action Required
- Open Orders

Sorting:

By default, the orders with status "Pending buyer confirmation" should always be at the top and all order should be sorted from oldest order date to the earliest. ~~There should be three stages of sorting for all fields. The third stage will be default sort.~~

Action Required

The orders with the following statuses will be part of this sub tab.

1. Pending Buyer Confirmation

The fields without "X" means that these fields will not be populated and will remain empty always for orders with the mentioned status. The fields with "X" may or may not be populated.

Field Name / Status type	1 - Pending Buyer Confirmation	Information
Status/Action	X	1 - Button hyperlinked to the order details page. The button Name will be "Confirm Receipt"
Order Number	X	Hyperlinked to the order details page
Order Date	X	Date on which the order was placed by the buyer
Seller Acceptance Date	X	Date on which the seller accepted the order
Shipping total	X	
Order total	X	
Shipping Method	X	Shipping Method selected by the buyer when order was placed. If manual (shipping fee per box) method is selected, the method will be called "Seller method". If the order has more than one shipping method, the field will have the text "Multi"
Shipping Date	X	The field will have the date on which the seller added the tracking number. If the seller added the tracking number only once, the actual date will be mentioned. If the seller added/edited the tracking number more than once, the text "Multi" will be displayed.
Tracking Number	X	Tracking number with shipping carrier name will be displayed. If more than one tracking number is provided by the seller, the text "Multi" will be displayed.
Seller Name	X	Hyperlinked - When user clicks, the user is taken to the buy marketplace displaying only the seller's products

Open Orders

The orders with the following status will be part of this sub tab.

1. Pending Seller Acceptance
2. Pending Fulfillment
3. Partially fulfilled
4. In transit
5. Open Case
6. Return
7. Exchange

The fields without "X" means that these fields will not be populated and will remain empty always for orders with the mentioned status. The fields with "X" may or may not be populated.

Field Name / Status type	1 - Pending Seller Acceptance	2 - Pending Fulfillment	3, 4, 5, 6 & 7 - Partially fulfilled / In transit/Open Case/Return/Exchange	Information
Status	X	X	X	Status Name
Order Number	X	X	X	Hyperlinked to the order details page
Order Date	X	X	X	Date on which the order was placed by the buyer
Seller Acceptance Date		X	X	Date on which the seller accepted the order
Shipping total	X	X	X	Shipping fee paid by buyer
Order total	X	X	X	

Shipping Method	X	X	X	Shipping Method selected by the buyer when order was placed. If manual (shipping fee per box) method is selected, the method will be called "Seller method". If the order has more than one shipping method, the field will have the text "Multi"
Shipping Date / Expected Shipping Date		X	X	1 - The field will be blank 2 - The field will have the date selected by the seller as "Expected shipping date" during "Seller Acceptance" process. If the "expected shipping date" is in the past (based on EST), the field will be blank. 3, 4, 5, 6 & 7 - The field will have the date on which the seller added the tracking number. If the seller added the tracking number only once, the actual date will be mentioned. If the seller added/edited the tracking number more than once, the text "Multi" will be displayed.
Tracking Number			X	Tracking number with shipping carrier name will be displayed. If more than one tracking number is provided by the seller, the text "Multi" will be displayed.
Seller Name	X	X	X	Hyperlinked - When user clicks, the user is taken to the buyer marketplace displaying only the seller's products

History

This section will contain orders bought by the member and has the status complete (buyer) / canceled. Default sort will be Order date (most recent at top).

The orders with the following statuses will be part of this tab.

1. Completed
2. Canceled

The grid will have the following fields.

The fields without "X" means that these fields will not be populated and will remain empty always for orders with the mentioned status. The fields with "X" may or may not be populated.

Field Name / Status type	**1 - Completed**	**2 - Canceled**	**Information**
Order Number	X	X	Hyperlinked to the order details page
Order Date	X	X	Date on which the order was placed by the buyer
Seller Acceptance Date	X	X	Date on which the seller accepted the order
Shipping total	X	X	
Order total	X	X	
Shipping Method	X	X	Shipping Method selected by the buyer when order was placed. If manual (shipping fee per box) method is selected, the method will be called "Seller method". If the order has more than one shipping method, the field will have the text "Multi"
Shipping Date	X	X	1 - The field will have the date on which the seller added the tracking number. If the seller added the tracking number only once, the actual date will be mentioned. If the seller added/edited the tracking number more than once, the text "Multi" will be displayed. 2 - The field will have the date on which the seller added the tracking number. If the seller added the tracking number only once, the actual date will be mentioned. If the seller added/edited the tracking number more than once, the text "Multi" will be displayed. If the seller never added a tracking number, the field will be blank
Tracking Number	X	X	1 - Tracking number with shipping carrier name will be displayed. If more than one tracking number is provided by the seller, the text "Multi" will be displayed. 2 - Tracking number with shipping carrier name will be displayed. If more than one tracking number is provided by the seller, the text "Multi" will be displayed. If the seller never added a tracking number, the field will be blank
Seller Name	X	X	Hyperlinked - When user clicks, the user is taken to the buyer marketplace displaying only the seller's products

Order Search & Pagination

The user should be able to search an order based on

- Product name
- UPC #
- Order #

If the user uses Product name / UPC, the results should contain orders which contain the product / UPC relevant to search term.

Pagination

- "number of orders per page" drop-down menu (10/25/50/100/200 items per page) - Default value 100
- navigation between pages
- sum-up ("X to YYY. Page A of B.").

BR_database

Each order will have a unique order ID. When a order is updated, the history of previous values should be stored in the history field as a JSON script.

Acceptance Criteria

My orders page:

1. The user is able to sort the orders
2. The user is able to search based on UPC, Seller SKU ID and product name
3. All fields are populated with correct values (based on formulas/logic mentioned)
4. The orders are correctly categorized based on the order status

US 47 - VM Order Flowchart

WBS #

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-303	WBS 98: PHP VM Sell History - Completed Order Details	Jul 05, 2018 09:10		logesh.karthikeyan@htcindia.com	IN QA	Unresolved	Sprint 12
MHX-301	WBS 96: PHP VM Tracking	Jun 07, 2018 07:13		logesh.karthikeyan@htcindia.com	IN QA	Unresolved	Sprint 11
MHX-249	WBS 94: PHP VM Confirm Order	Jun 07, 2018 07:13		Senthil Vasan	IN QA	Unresolved	Sprint 11
MHX-215	WBS 117: PHP VM - See order details[Purchased Orders]	Jul 05, 2018 09:09		logesh.karthikeyan@htcindia.com	IN QA	Unresolved	Sprint 12
MHX-212	WBS 92: PHP VM - See order details	Jun 07, 2018 07:13		Senthil Vasan	IN QA	Unresolved	Sprint 11
MHX-202	WBS 115: PHP VM - Order Cancel from Buyer	Jul 05, 2018 09:09		logesh.karthikeyan@htcindia.com	IN QA	Unresolved	Sprint 12
MHX-201	WBS 95: PHP VM - Vendor Cancelling the order	Jun 07, 2018 07:13		logesh.karthikeyan@htcindia.com	IN QA	Unresolved	Sprint 11
MHX-199	WBS 119: PHP VM - Return or Xchange - Non-Return Information	Jul 05, 2018 09:09		logesh.karthikeyan@htcindia.com	IN QA	Unresolved	Sprint 12
MHX-198	WBS 99: PHP VM - Returns/Exchanges	Jun 07, 2018 07:13		logesh.karthikeyan@htcindia.com	IN QA	Unresolved	Sprint 11

9 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered seller/buyer user of VM 3.0, I want the view order details so that I can view and take actions on my orders

End Objective:	To provide a page for registered users to view the order details and take action
User/Actor:	Primary users and Secondary seller / buyer users of VM.
Program Type:	Webpage
Trigger:	Clicks on a hyperlink/button provided
Related User Story:	US 45 - VM Seller My Orders & US 46 - VM Buyer My Orders
Related WBS #:	92, 94 - 96, 98, 99, 115, 117, 119

Related WBS description

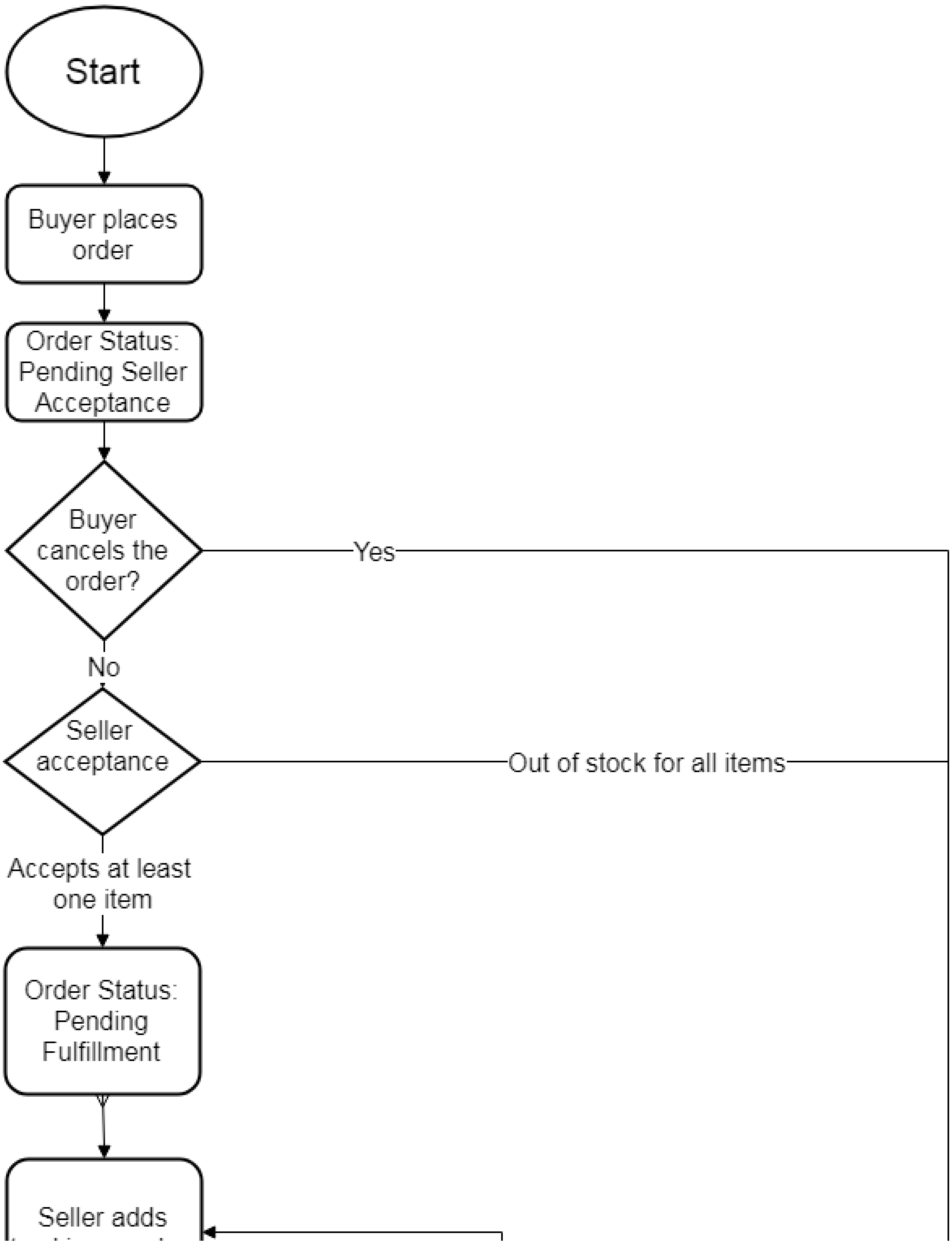
92	As a vendor I want to be able to see full order details: - order id - order status Pending vendor confirmation In Process (after Vendor Acceptenace) Pending Vendor Settlement (when tracking number is uploaded. Max of 5 tracking numbers can be added) Settlement (Payment) - buyer Buyer Name Shipping address - "Order date" (date); - "Order total" (money); - Shipping Grid- Item Name - Qty Order - Qty Shipped 1. ABC 10 5 - all tracking numbers with shipped date to be displayed (Max of 5)

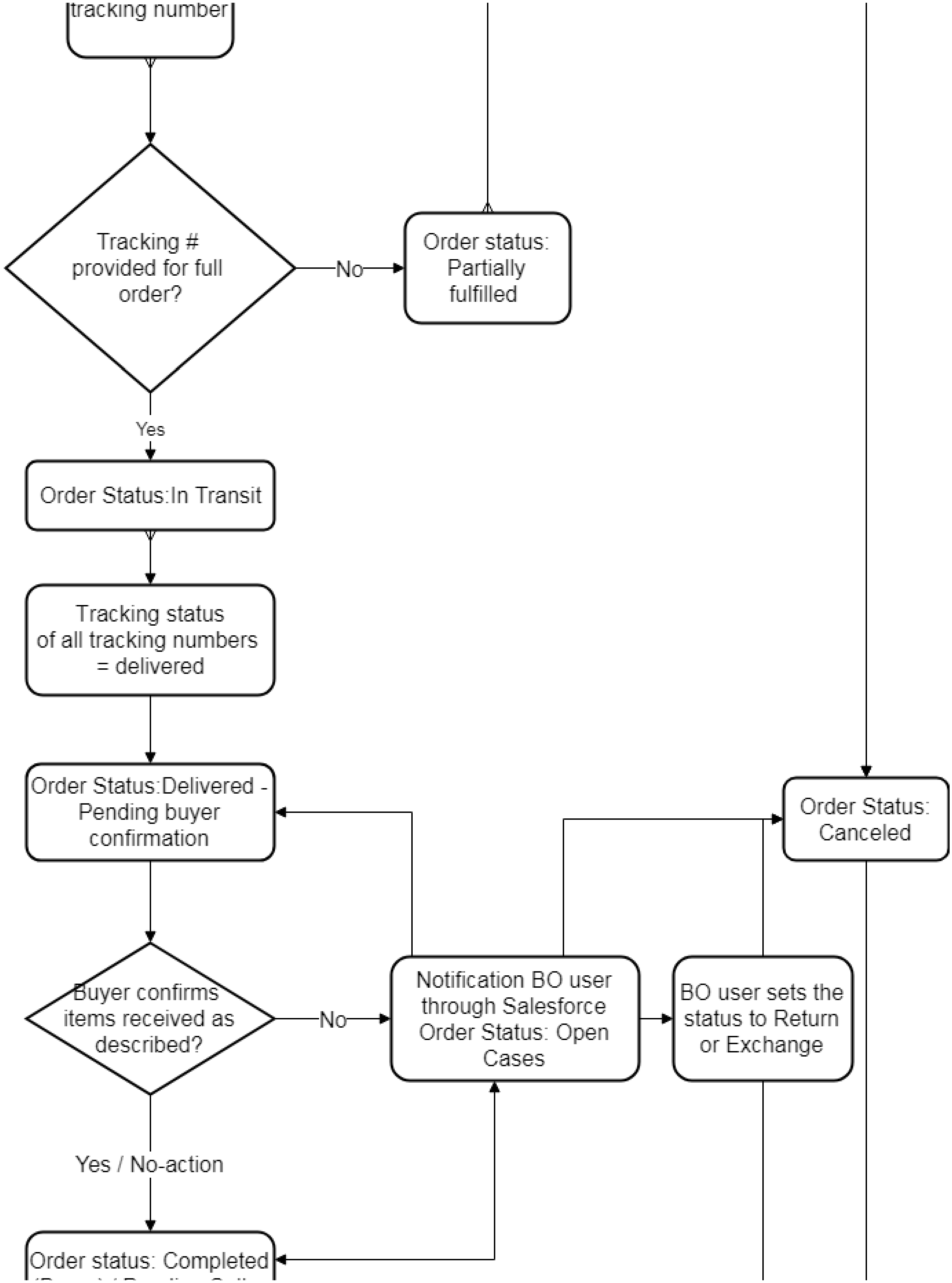
94	As a vendor I want to be able to confirm order [After buyer orders] Once the vendor click the "confirm" button on the order page, the full order details should be displayed and the option to confirm or cancel the order should be available. Once the order is confirmed, the status changes to "In process" waiting for tracking # to be provided so that the system displays:
95	As a Vendor I want to be able to cancel an order if needed After item was cancelled due to some reasons - posting of corresponding items in the order - disappears so that Vendor needs to post it again with usual posting procedure so that it would be availabe on a marketplace again. The canceled order details remain in the order page. The buyer is notified via email that the order has been canceled.
96	As a vendor i want to be able to provide tracking # for order shipping I want the system to display: - list of the items in the order as Shipping Grid Item Name - Qty Order - Qty Shipped 1. ABC 10 5 - Section to enter the tracking number (max of 5) -shipping date; - buttons: Cancel; Submit. Note: partial shipment is possible so that more than one tracking # to be added. Addition of tracking number is the trigger to charge the buyer. Buyer should be debited on the exact items amount as it stated for shipping.
98	As a vendor I want to be able to see full order details: - order id - order status Completed Canceled - buyer Buyer Name Shipping address - "Order date" (date); - "Order total" (money); (Product total + Shipping charges) - "Product total" (money);+G209 - "MRX fee" (money); - "Settlement" (money); - - "Settlement Date" - Shipping Grid- Item Name - Qty Order - Qty Shipped 1. ABC 10 5 - all tracking numbers with shipped date to be displayed (Max of 5)
99	The buyer should have the option to return or exchange the items. The buyer will need to choose the order that contains the items that need to be returned/exchanged. The buyer will be able to select the items and quantity to be returned. Reason to return. Click Submit. (The above will be a CRM form) The BO User will coordinate the return between the buyer and seller manually.
115	As a buyer I want to be able to cancel an order if needed After item was cancelled due to some reasons - posting of corresponding items in the order - disappears so that Vendor needs to post it again with usual posting procedure so that it would be availabe on a marketplace again Order can only be canceled prior to it being marked as seller accepted. If canceled and CC used as payment method, the CC authorization will also be canceled - Zeamster integration.
117	As a user, I want to be able to display details of each order I purchased (items only, no shipping): - "order number"; - "order date"; - "Name" (item name) - Item ID (Vendor's SKU #) - Variants (e.g. color, size) if applicable - "Price / Unit (ea)" (price; price per unit); - "Qty" (quantity); - "Product total" (money); - "Shipping total" (money); - Order total" (money); - "Shipping method" (value from shipping methods dictionary) - "Shipping date" (date); - "Tracking #" (FedEx tracking number [links to FedEx web page with parcel tracking information) List has a summary row with total product cost.

119	If the item is non - returnable, the below should be disabled. If the item is returnable, the user will have an ability as a buyer to mark that i need a return or exchange of an order (set "return/exchange" for order and choose reason from a drop down and comments). This will be a CRM form. This would trigger an action for BO user to call the user.

Order Life-cycle

Order life-cycle flow chart




tracking number
Tracking # provided for full order?
No
Order status: Partially fulfilled
Yes
Order Status:In Transit
Tracking status of all tracking numbers = delivered
Order Status:Delivered - Pending buyer confirmation
Order Status: Canceled
Buyer confirms items received as described?
No
Notification BO user through Salesforce Order Status: Open Cases
BO user sets the status to Return or Exchange
Yes / No-action
Order status: Completed

Order status dictionary

The list of possible statuses for an order:

Order Status	Action needed to reach this status	Occurence	Notification to	Notification Action (US 6 - Pharmacy/VM Wholesaler Menu - BR_Notifications)	Triggers - Financial
Pending Seller Acceptance	• Once an item posted by the seller is sold	All orders will have this status once	Seller & Buyer	Seller - VM_Seller Posting sold Buyer - VM_Buyer Order Confirmation	If credit card is used, credit card is charged. If ACH is used, creates buyer transaction and schedule it for MMS
Pending Fulfillment	• Once the seller has accepted at least one item in the order	Orders may or may not have this status during their life-cycle	Buyer only when one or more items but not all are marked out of stock	VM_Items marked out of stock	If one or more items are marked out of stock, a CC refund has to be processed or ACH should be canceled (if not processed yet) or a refund ACH should be scheduled (if ACH was processed)
Partially fulfilled	• If the seller has uploaded at least one tracking number but tracking number not uploaded for the full order	Orders may or may not have this status during their life-cycle	Buyer	VM_Tracking Number	

In-Transit	• If the seller has uploaded the tracking number for the full order or if the seller have selected "Fulfillment Completed"	All orders will have this status once unless the order is canceled before it reaches this stage in the life-cycle	Buyer	VM_Tracking Number	
Delivered - Pending Buyer Confirmation	• Once all tracking numbers indicate that the full order is delivered.	All orders will have this status once unless the order is canceled before it reaches this stage in the life-cycle	Buyer	VM_Buyer Verification of Order	
Pending Seller Settlement (for Seller) / Completed (for Buyer)	• Once the buyer confirms the receipt of the full order.	All orders will have this status once unless the order is canceled before it reaches this stage in the life-cycle	Seller	VM_Seller Sale Complete	Creates Seller transaction and schedule it for MMS
Open Case	• When the buyer states that the items received is not as described.	Orders may or may not have this status during their life-cycle	• MatchRX BO user • Buyer	• Notification on salesforce as a case • VM_Order Receipt Revision - Buyer	N/A
Completed (f or Seller)	• Once the ACH date is generated for the Seller's financial transaction	All orders will have this status once unless the order is canceled before it reaches this stage in the life-cycle	Seller	• VM_Seller Batch Settlement	Credits Seller
Canceled	• If the seller/buyer cancels when the status is pending seller acceptance	Orders may or may not have this status during their life-cycle	Seller / Buyer	• Buyer Canceled Order • Seller Canceled Order	
Return	The BO user may change the status to Return when the buyer wants to return	Orders may or may not have this status during their life-cycle			
Exchange	The BO user may change the status to Return when the buyer wants to return	Orders may or may not have this status during their life-cycle			

Notifications

~~VM Notification.xlsx~~

~~Updated July 12 - VM Notification June 26.xlsx~~

~~Updated July 25 - VM Notification July 25.xlsx~~

Updated Sep 10 -VM Notification-Sep 10.xlsx

Order Details Page

The order details page will vary based on section (US 45 & US 46) in which the order is found.

In all statuses except Open case/Return/Exchange, if a BO user adds/edits/deletes an item in the order from Salesforce, it should be reflected in the website. The original qty order and product total should have a strike through and the new qty ordered and product total should be mentioned. BO user entered message should also be displayed.

VM Seller - Action Required

Status = Pending Seller Acceptance

The order details page will have the following field.

Seller Acceptance: Confirm the availability of each item by clicking Accept or Out of Stock in the "Confirmation Status" column.

Field Name	Information
	Section 1
Order Number	System Generated

Order Date	System Generated
Confirmation Status	• Accept • Out of Stock If the user selects Out of stock and if there are more quantity available in the marketplace for the same posting, the qty has to be changed to 0 and removed from marketplace.
Items in the order listed one below the other	The item details will have the following fields • Product Name • UPC • Seller SKU ID • Price (price at which the order was placed) • Sale Promo tag (if Sales promo is active) • Quantity Ordered • Ships within "XX" days • Shipping method • Shipping fee • Images • Product Total • Price x Qty available
Section 2 - Option A - If confirmation status is "Accept" for at least one item in the order	
Expected Fulfillment Date	date range: current date + 13 days (e.g. Current date: May 15. The last date in the range is May 28)
Print pick list	A PDF document containing the list of items in the order with UPC, seller sku id, Qty ordered, Ships within, shipping method, price, product total, shipping fee, Buyer's DBA and Buyer's Shipping address selected during checkout
Buyer's DBA and Shipping address	Buyer's DBA and Buyer's Shipping address selected during checkout should be displayed.
Section 2 - Option B - If comfirmation is "Out of Stock" for all items in the order	
Message	**This order will be canceled** Click the **Submit Cancellation** button now to send a notification to the Buyer.
Print Pick List	A PDF document containing the list of items in the order with UPC, seller sku id, Qty ordered, Ships within, shipping method, price, product total, shipping fee, Buyer's DBA and Buyer's Shipping address selected during checkout
Buyer's DBA and Shipping address	Buyer's DBA and Buyer's Shipping address selected during checkout should be displayed.
Section 3	
Item(s) total	Sum of value of the items in $. This value will be 0 if for Section 2 - Option B.
Shipping Fee	Sum of Shipping Fee in $
MatchMH fee	Fixed % of item total that is defined for the particular seller
Credit total	Item total + Shipping fee - MRX fee
Submit Order / Submit Cancellation	If it is Section 2 - Option A, the button text will be **Confirm Acceptance** If it is Section 2 - Option B, the button text will be **Confirm Cancellation.** The buttons should be disabled. Only when one of the confirmation status is selected for all items and expected shipping date is selected, the submit button should be enabled.
Back	

Once the user clicks one of the "submit" button, the following scenarios are possible:

Order canceled

Display the below message
Order Cancellation Notice

Your order has been canceled

You may reach us at customerservice@matchrx.com
or call 1-877-590-0808.

Accepted Order

Accepted Order Successfully
Next steps: Pick, pack, and ship. Return to My Orders page to upload the tracking number(s).

Buttons: Print Pick List, Go to My Orders

Status = Pending Fulfillment/Partially Fulfilled

The order details page will have the following field.

Please enter quantity fulfilled and tracking number for each line item shipment.

Field Name	Information
Section 1	
Order Number	System Generated
Order Date	System Generated

Items in the order listed one below the other	Items that are marked out of stock during seller acceptance will have all the fields below but original qty ordered and product total will have a strike through and the new qty order and product total will be mentioned. Also, the seller will not have the option to enter "Fulfilled Quantity & Tracking number with shipping carrier". "Seller marked as Out of Stock" message should also be displayed.
	
	The item details will have the following fields
	
	• Product Name
	• UPC
	• Seller SKU ID
	• Description (only for Buyer)
	• Price (price at which the order was placed)
	• Sale Promo tag (if Sales promo is active)
	• Quantity Ordered
	• Fulfilled Quantity & Tracking number with shipping carrier
	    ◦ the user will be able to enter any value between 1 and "quantity to be fulfilled" for field "Fulfilled Quantity". The user will be able to add multiple lines till the field "Qty to be fulfilled" reaches 0. The user should enter Tracking number with shipping carrier (drop-down) for each line.
	    ◦ If the order status = partially fulfilled, the user will not be able to edit the previous filled values
	• Quantity to be fulfilled ("Oty ordered" field - sum of all line in "Fulfilled qty" field)
	• Ships within "XX" days
	• Shipping method
	• Shipping fee
	• Images
	• Product Total
	    ◦ Price x Qty available

Section 2	
Expected Fulfillment Date	Read only field.
Print pick list	A PDF document containing the list of items in the order with UPC, seller sku id, Qty ordered, Ships within, shipping method, shipping fee, Buyer's DBA, Buyer's Shipping address selected during checkout, qty fulfilled, to be fulfilled, shipping carrier and tracking number.
Buyer's DBA and Buyer's shipping address	Buyer's DBA and Buyer's Shipping address selected during checkout should be displayed.
Section 3	
Item(s) total	Sum of value of the items in $.

Shipping Fee	Sum of shipping fee in $
MatchMH fee	Fixed % of order value that is defined for the particular seller
Credit total	Item total + Shipping Fee - MRX fee
Submit	The buttons should be disabled. Only when one of the qty fulfilled, shipping carrier field and tracking number is valid for every open line, the submit button should be enabled.
Back	

Partially Fulfilled Order:

Display the below message

Fulfillment Updated Successfully
Fulfill the remaining items/quantity.

Scenario 2: If the order is fully filled, the message should be

Fully Fulfilled Order:

Display the below message

Fulfillment Complete
All items have been successfully fulfilled and uploaded. Buyer has been notified with tracking number(s).

Sales in Progress - Open Orders

This section will contain orders sold by the VM seller and with any status other than Pending Seller Acceptance / Partially Fulfilled / complete / canceled.

The order details page will have the following fields

Status = In-Transit / Pending Settlement / Open Case / Return / Exchange

When order status = Open / Return / Exchange , any revision made through back office will not be updated in this page. For example:

1. Buyer order 5 items
2. Seller accepts, fulfills 2 items and completes fulfillment
3. Order status changes to complete
4. Buyer calls back office and mentions that he wants to return item 1 and keep 2 and seller agrees.
5. BO user will make the revision on Salesforce and the set the order status to "Return"
6. When the seller views this page, he/she will see all five items as it was when the order status is pending settlement.
7. When the order status is changed to completed by the BO user, the order details page will display only the 1 item retained by the buyer.

Field Name	Information
Section 1	
Order Number	System Generated
Order Date	System Generated

Items in the order listed one below the other	The item details will have the following fields
	
	• Product Name
	• UPC
	• Seller SKU ID
	• Price (price at which the order was placed)
	• Suggested Retail Price
	• Sale Promo tag (if Sales promo is active)
	• Sale price (if Sales promo is active)
	• Quantity Ordered
	• Fulfilled Quantity & Tracking number with shipping carrier
	    ◦ If the seller shipped with more than one tracking number, multiple lines with fulfilled qty, tracking number and shipping carrier has to be displayed.
	• Returns Allowed (Yes/No)
	• Return Policy description (If Returns allowed is Yes)
	• Ships within "XX" days
	• Shipping method
	• Shipping fee
	• Images
	• Product Total
	    ◦ Price x Qty available
	• Item Total (Product total + Shipping fee)

Section 2	
Fulfillment Date	Date on which the fulfillment was completed
Buyer Name & Address	
Settlement Amount	• If status = In-transit, this field will not be displayed • If status = Pending Seller Settlement, display the expected settlement amount • If one or more transactions with ACH date is already available (transaction already settled), display each t ransactions separately • If one of more transactions with ACH date is already available and a transaction with pending settlement status, display each transactions separately
Settlement Date	• If status = In-transit, this field will not be displayed • If status = Pending SellerSettlement, display '"{Date} (expected)" • If one or more transactions with ACH date is already available (transaction already settled), display each settlement date separately • If one of more transactions with ACH date is already available and a transaction with pending settlement status, display each settlement date separately
Section 3	
Item(s) total	Value of the order in $ without including shipping and MatchRX fees.
Shipping total	Shipping cost to be paid by the seller.
MatchMH fee	% of order value calculated based on Financial Group the member belongs to (US 18 - BO Manage Pharmacy Group - BR_Financial Group)
Credit total	
Back	

Purchases in Progress - Action Required

Status = Delivered - Pending Buyer confirmation

Display the below message at the top of the page

Buyer Confirmation: Approve the item(s) received match the line item details in the order by checking Yes or No in the Approved column.

Field Name	Information

Section 1	
Order Number	System Generated
Order Date	System Generated
Approved (for each item) Approve all checkbox to select "Yes" for all items	Yes/No (Default selection is None) If No is selected, a text box is displayed with the message inside the text box "Describe the issue in detail i.e. I received wrong product, Qty received was xx".

Items in the order listed one below the other	The item details will have the following fields
	• Product Name
	• UPC
	• Seller SKU ID
	• Price (price at which the order was placed)
	• Sale Promo tag (if Sales promo is active)
	• Quantity Ordered
	• Fulfilled Quantity & Tracking number with shipping carrier
	    • If the seller shipped with more than one tracking number, multiple lines with fulfilled qty, tracking number and shipping carrier has to be displayed.
	• Returns Allowed (Yes/No)
	• Return Policy description (If Returns allowed is Yes)
	• Ships Within
	• Shipping method
	• Shipping fee
	• Images
	• Product Total
	    • Price x Qty available

Section 2 - Option A - If Approved column is Yes for all items	
Rate this order	Rating stars will be increment of 1 (min 1, max 5) Comments section will not be displayed by default. It will appear only when the user selects a rating 4 or below.
Seller	Seller DBA
Payment Date	ACH Date or CC charged date. If multiple payments are attached to this order, display each payment separately.
Form of Payment	Could be ACH or VISA/Mastercard etc. If multiple payments are attached to this order, display each payment separately.
Bank Account or Credit Card Number	Only last 4 will be visible. If multiple payments are attached to this order, display each payment separately.
~~Amount~~	~~Amount charged. If multiple payments are attached to this order, display each payment separately.~~
Section 2 - Option B - If Approved column is No for at least one item	
Reason for order issue	~~Drop down~~ Check box with options (Incorrect quantity, Incorrect item(s), Packaging issue, Item(s) damaged, Other) - Multi selection is possible.
Seller	Seller DBA
Section 3 - Option A - If Approved column is Yes for all items	
Item(s) total	
Shipping charges	
Order total	
Back	
Submit	Button
Section 3 - Option B - If Approved column is No for at least one item	
Submit Case	Button

Completed Order:

If the buyer marks "Yes" for all items, the order status is changed to "Completed" for Buyer and "Pending Settlement" for the seller. The financial transaction for seller and buyer (if any refund/charge needs to be done) is generated for MMS to use.

Display the below message:

"Your order is complete."

Continue shopping button

Open Case:

If the buyer marks "No" to one or more items, the order status is changed to "Open Case". The financial transactions are not generated. A case should be generated in Salesforce with Order Number, Buyer Account, Buyer Contact (user who submitted the case) Seller account (all three hyperlinked), Reason for order issue and the items (Posting ID) marked as "Yes/No" with text box.

Display the below message in the webpage.

"Your case has been submitted. A customer service representative will contact you for further review. Please reference the order number '{order number} when contacting customer service at 877 590 0808."

Continue shopping button.

Purchases in Progress - Open Orders

Status = Pending Seller Acceptance

<table>
<tr><th>Field Name</th><th>Information</th></tr>
<tr><td colspan="2" align="center">Section 1</td></tr>
<tr><td>Order Number</td><td>System Generated</td></tr>
<tr><td>Order Date</td><td>System Generated</td></tr>
<tr><td>Items in the order listed one below the other</td><td>The item details will have the following fields
Product Name
UPC
Seller SKU ID
Price (price at which the order was placed)
Sale Promo tag (if Sales promo is active)
Quantity Ordered
Returns Allowed (Yes/No)
Return Policy description (If Returns allowed is Yes)
Ships Within
Shipping method
Shipping fee
Images
Product Total
Price x Qty available
The buyer will be able to remove one or more items from the item by clicking on the trash icon. The order total and shipping total for the order will be revised. The qty removed by the buyer will be added back to the seller's postings as long as seller hasn't deleted the posting.</td></tr>
<tr><td>Message</td><td>Order is pending seller acceptance. You may remove one or more items at this time. Your refund will be processed within 48 hours.</td></tr>
<tr><td colspan="2" align="center">Section 2</td></tr>
<tr><td>Form of Payment</td><td>Could be ACH or VISA/Mastercard etc. If multiple payments are attached to this order, display each payment separately.</td></tr>
<tr><td>Bank Account or Credit Card Number</td><td>Only last 4 will be visible. If multiple payments are attached to this order, display each payment separately</td></tr>
<tr><td>Payment Date</td><td>ACH Date or CC charged date. If multiple payments are attached to this order, display each payment separately.</td></tr>
<tr><td><s>Amount</s></td><td><s>Amount charged. If multiple payments are attached to this order, display each payment separately.</s></td></tr>
</table>

Section 3	
Item(s) total	Value of the order in $ without including shipping.
Shipping charges	
Order total	Item total + Shipping total
Back / Cancel Order / Revise Order	If the buyer doesn't cancel any item, the button will be back. If the buyer cancels all items, the button will be Cancel Order. If the buyer cancels one or more item but not all items, the button will be Revise Order.

Cancel Order

If the user cancels the order, the system has to set the status to "Canceled" and display the below message

Order Cancellation Notice

Your order has been canceled

You may reach us at customerservice@matchrx.com
or call 1-877-590-0808.

Status = Pending Fulfillment / Partially fulfilled / In Transit / Open Case / Return / Exchange

After the order reaches the status = Open Case / Return / Exchange, any revision made through back office or through website will not be updated in this page. For example:

1. Buyer order 5 items
2. Seller accepts, fulfills 2 items and completes fulfillment
3. Order status changes to complete
4. Buyer calls back office and mentions that he wants to return item 1 and keep 2 and seller agrees.
5. BO user will make the revision on Salesforce and the set the order status to "Return"
6. When the seller views this page, he/she will see all five items as it was when the order status is pending settlement.
7. When the order status is changed to completed by the BO user, the order details page will display only the 1 item retained by the buyer.

Field Name	Information
Section 1	
Order Number	System Generated
Order Date	System Generated

Items in the order listed one below the other	The item details will have the following fields
	• Product Name
	• UPC
	• Seller SKU ID
	• Price (price at which the order was placed)
	• Sale Promo tag (if Sales promo is active)
	• Quantity Ordered
	• Fulfilled Quantity & Tracking number with shipping carrier (Not displayed for status = Pending fulfillment)
	    ◦ If the seller shipped with more than one tracking number, multiple lines with fulfilled qty, tracking number and shipping carrier has to be displayed.
	• Returns Allowed (Yes/No)
	• Return Policy description (If Returns allowed is Yes)
	• Ships Within
	• Shipping method
	• Shipping fee
	• Images
	• Product Total
	    ◦ Price x Qty available

Message	
Section 2	

Fulfillment Date	If status = Pending Fulfillment / Partially fulfilled, display the date provided by seller as Expected fulfillment date. If status = In transit / Open Case/ Return / Exchange, display the date on which the status changed to In transit.
Form of Payment	Could be ACH or VISA/Mastercard etc. If multiple payments are attached to this order, display each payment separately.
Account Number or CC Number	Only last 4 will be visible. If multiple payments are attached to this order, display each payment separately
Payment Date	ACH Date or CC charged date. If multiple payments are attached to this order, display each payment separately.
~~Amount~~	~~Amount charged. If multiple payments are attached to this order, display each payment separately.~~
Section 3	
Item(s) total	Value of the order in $ without including shipping.
Shipping charges	
Order Total	Item total + Shipping total
Back	

History

This page will list all the non-active orders brought or sold by a particular member (even items listed by other users of the same pharmacy). Non-active orders are orders with status complete or canceled n the Order dictionary. The orders will be grouped into two sections, namely:

Sell History

This section explains the details of orders sold by the pharmacy and has the status complete / canceled.

Field Name	Information
Section 1	
Order Number	System Generated
Order Date	System Generated

Items in the order listed one below the other	The item details will have the following fields
	• Product Name
	• UPC
	• Seller SKU ID
	• Price (price at which the order was placed)
	• Suggested Retail Price
	• Sale Promo tag (if Sales promo is active)
	• Sale price (if Sales promo is active)
	• Quantity Ordered
	• Fulfilled Quantity & Tracking number with shipping carrier
	    ◦ If the seller shipped with more than one tracking number, multiple lines with fulfilled qty, tracking number and shipping carrier has to be displayed.
	• Returns Allowed (Yes/No)
	• Return Policy description (If Returns allowed is Yes)
	• Ships within "XX" days
	• Shipping method
	• Shipping fee
	• Images
	• Product Total
	    ◦ Price x Qty available
	• Item Total (Product total + Shipping fee)

Section 2 - Option A - Order Status = Completed & Order status = canceled after seller acceptance	

Settlement Amount	
Settlement Date	
Buyer Name & Address	Shipping address ~~& State license #~~
Message (only for status = canceled)	Your order has been canceled
Section 2 - Option B - Order Status = Canceled before seller confirmation	
Message	Your order has been canceled
Section 3 - Displayed for Option A only	
Item(s) total	Value of the order in $ without including shipping and MatchRX fees.
Shipping charge	Shipping cost paid by the seller.
MatchRX fee	
Credit total	
Download Invoice	Button to download the above information as an invoice. Sample invoice (MRX-Orders-Sell-V2.pdf)
Message	Per the MatchRX User Agreement, buyer attests that items are for a specific patient need or purchased during a declared public health emergency.
Back	

Buy History

This section explains the details of orders bought by the pharmacy and has the status complete / canceled.

Field Name	Information
Section 1	
Order Number	System Generated
Order Date	System Generated

Items in the order listed one below the other	The item details will have the following fields
	• Product Name
	• UPC
	• Seller SKU ID
	• Price (price at which the order was placed)
	• Sale Promo tag (if Sales promo is active)
	• Quantity Ordered
	• Fulfilled Quantity & Tracking number with shipping carrier
	    ◦ If the seller shipped with more than one tracking number, multiple lines with fulfilled qty, tracking number and shipping carrier has to be displayed.
	• Returns Allowed (Yes/No)
	• Return Policy description (If Returns allowed is Yes)
	• Ships Within
	• Shipping method
	• Shipping fee
	• Images
	• Product Total
	    ◦ Price x Qty available

Section 2 - Option A - Order Status = Completed & Canceled after seller acceptance	
Ship Date	If status = Pending Fulfillment / Partially fulfilled, display the date provided by seller as Expected fulfillment date. If status = In transit / Open Case/ Return / Exchange / Completed / Canceled, display the date on which the status changed to In transit.
Bank Name / CC Provider	

Account / CC Number	Account number/CC number masked with last 4 digits visible
Payment Date	Same as ACH date found in Salesforce (US 36 - BO Financial Transaction). This is the date provided my MMS application. If CC, date on which seller accepted the order.
Seller Name	Seller DBA
Message (only for status = canceled)	Your order has been canceled
Section 2 - Option B - Order Status = Canceled before seller acceptance	
Message	Your order has been canceled
Section 3 - Displayed for Option A only	
Item(s) total	
Shipping charge	
Order Total	
Download Invoice	Button to download the above information as an invoice. Sample invoice (MRX-Orders-Buy-V2.pdf)
Message	
Back	

US 48 - BO Document Template

WBS #	**Key**	**Summary**	**Updated**	**Due**	**Assignee**	**Status**	**Sprint**
	MHX-1008	C005 - Salesforce - Document Template Management	May 21, 2018 12:48		Swapna.Patnaikuni	IN QA	Sprint 10
	1 issue						
Document status	APPROVED						
Document owner	Raghul Manoharan						
UI Developer							
Developers							
QA							

Table of Contents

User Story

As a back office user of MatchRx, I want the generate customer specific letters and address label so that I can download, print and mail to the customer to xls format and perform analysis

End Objective:	To provide the ability to generate and download customer specific letters and address label
User/Actor:	Back office users of MatchRX

Application:	Salesforce
Trigger:	
Related User Story:	

Related WBS Description:

C005	**Templates:** • The requirement is to create and store 5 different templates in Salesforce. • These templates are primarily used to create documents as part of a task in salesforce. • These templates will contain variable such as First Name, Last Name, Pharmacy DBA, Address which should be correctly populated from the DB • A BO user should be able to update, edit and delete these templates using a HTML editor. • Two of the example templates are Welcome Letter MRX 01012018.doc and address label which will contain the First Name, Last Name, Pharmacy DBS, Street address 1, Street address 2, City, State, Zip and phone number.

Business Rules

Document Templates

- BO user should be able to create documents from the Account's tab and the Contact tab
- A BO user should be able to update, edit and delete these templates using a HTML editor.
- The template formats are

Welcome_Letter_VM_Buyer_Only_04232018.doc

Welcome_Letter_VM_Seller_04232018.doc

Welcome_Letter_MRX_&_VM_04232018.doc

Address Label

The BO user should be able to create address label from the Account's tab and the Contact tab.

Address label will contain the following fields

1. First Name
2. Last Name
3. Pharmacy DBA
4. Street address 1
5. Street address 2
6. City
7. State
8. Zip
9. Phone number.

US 49 - MRX 3.0 My Dashboard

WBS #	

Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
MHX-203	WBS 61: PHP Sell lifecycle + payment info - Match Money	Jul 10, 2018 10:41		Senthil Vasan	IN QA	Unresolved	Sprint 13
MHX-168	WBS 22: PHP Display Pharmacy Seller rating	Jun 11, 2018 10:35		rajasekar.jeyakumar@htcindia.com	IN QA	Unresolved	Sprint 11
MHX-103	WBS 67: PHP Orders search & Statements	Jul 05, 2018 10:36		rajasekar.jeyakumar@htcindia.com	IN QA	Unresolved	Sprint 12

3 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered user of MRX 3.0 website, I want a dashboard to view member ratings, MatchMoney and order statement so that I can keep track of the rating, MatchMoney and my orders

End Objective:	To provide member rating, MatchMoney and order statement information to the registered users of the website
User/Actor:	Primary users and Secondary users
Program Type:	Webpage
Trigger:	N/A
Related User Story:	
Related WBS #:	22, 61, 67

Related WBS description

22	As a pharmacy I want to display my seller rating. Factors that will affect the rating 1. Time taken by seller to confirm the order, 2. From last 20 completed + canceled orders: % of Orders canceled by sellers % of Orders revised by the Seller excluding canceled orders. %'s will include matrix of tiers that determine rating stepdown. Example: Canceled % => 10% < 15% 1/2 star stepdown Canceled % => 15% < 20% 1 star stepdown Rating given by the buyer. As a pharmacy I want the application to display seller rating in scale 1 to 5 with 0.5 point granulation.. A special rating value "no history" should be displayed if the item posting pharmacy has no sales record. BO user functionality to change parameters in the above variable.

61	This is being currently developed for 2.0 As MatchRx, I want the pharmacy to earn "Match Money" when they sell completed order worth more than $5000 in a calendar month to motivate pharmacy's to sell. Threshold: Any member that sells $5,000 or more (excluding shipping) in a given calendar month will earn 50 basis points (0.5%) in Match Money. Calculation will initiate on the first day of the new month for the previous month order total (based on completion date). Order status must = Completed. Usage: Member will have 2 months to apply the Match Money against new sales orders. Use it or lose it. Business Rules: Earnings are calculated based upon Completion Date. Rewards floor ($5,000) and reward rate (0.5%) will be variables in the configuration file to allow future promo's. Match Money not used within 2 calendar months will automatically expire. Example: Match Money earned from July orders will expire 12:00:01am EST October 1. Match Money usage will be first-in-first-out. Match Money cannot be transferred between locations. Match Money must be applied by seller during the seller confirmation (after all revisions are accepted). All items must be marked as "available" in order for the "Apply My Match Money" to become live in the seller confirmation page. If field is live (member originally marks all as "available" but then member decides to revise an item, feature will grey out. Amount applied against an order cannot exceed the lesser of available balance or seller fee for the order. Member cannot use Match Money to offset seller shipping charges. Member cannot cash in Match Money. Match Money used against shipped orders that result in a buyer revision or buyer return will not be refunded. An email will be sent to all members at the start of the new month disclosing the reward amount and expiration date. Calculation Example: Member has completed sales of $7,345.21 during the month of July (based on completed date, status = Completed). Initial calculation of Match Money is $36.72 ($7,345.21 x .005) to be used by 12:00:01am EST October 1. Member experience: Seller Dashboard displays available Match Money. On seller confirmation page, "Apply Match Money" field is greyed out unless "Available" is selected for all items. Member can click Apply Match Money (amount not to exceed the lesser of available balance or order seller fee) or enter an amount manually (not to exceed the lesser of the available balance or order seller fee). Application of Match Money must display in the seller order history when viewing orders pending delivery and completed orders. Statements page should display the usage of Match Money for each order. Additional details will be added to BO screens. Check the attached file.
67	The data (columns) shown in the "statements" page under "Manage" tab will remain the same for 3.0. In 3.0, the page had to be made more interactive and dynamic by having the ability to filter and sort. The user should have the ability to print as PDF and export as .csv file. The format of exported file will remain the same as 2.0. As a pharmacy I want to be able to search mulitple completed orders for a specific NDC and/or product name. Results should include - "order number"; - "order date"; - "Name" (item name; NDC#) ; - "Strength / Packaging" (strength; packaging); - "Exp" (expiration month and year); - "Price / Unit (ea)" (price; price per unit); - "Qty" (quantity); - "Total" (ordered item's value). As part of "Statement" section under the "Manage" tab, the user should have the ability to search for a specific drug/NDC. Filter if the drug was purchased, sold or both. The existing functionality for searching by date range should remain. In 2.0, the result of statement search is a PDF without any filtering/sorting functionality. In 3.0, we should have that functionality.

My Dashboard

The "My dashboard" menu will be on the left pane on all pages once the user logged in. This menu will have three sections

- Member Status
- Member Rating
- MatchMoney
- Statements

Member Rating

Member rating formula is based on completed buy and sell activity in the past 365 days (excluding current day). Formula contains four rules (1 buy, 3 sell). Each rule will have a different weight when calculating the final published star rating.

When coding, the following should be variables in configuration file

- Minimum orders for each rule
- Maximum orders for each rule
- Look-back period for each rule
- Rule Thresholds
- Final Star Thresholds

Buyer - Rule #1: % of Buyer Canceled orders before Seller Revision or Seller Confirmation.

Count canceled buy orders for

- Buyer Member
- Member with Minimum of 3 orders and maximum 30 orders in the last 365 days (excluding current day)

If member does not meet the minimum and does not qualify for sell rating, Member Rating is “No Rating”.

Each canceled order = 1

Example: 27 Buy Orders in past 365 days.
1 Canceled by member (included in the 27 orders)

3.7% Buyer Canceled Orders sum(1/27) (Round up if .5+)

Rule #1 Star Rating = 4.00 See Rule Thresholds for Star Rating.

Seller - Rule #2: Seller Confirmation History

Minimum of 5 maximum 30 most recently completed or canceled sales in thelast 365 days (excluding current day). If member does not meet the minimum and does not qualify for buy rating, Member Rating is “No Rating”.

Consider only the orders which are confirmed by the seller at the first pending seller confirmation status (the order may reach the pending seller confirmation status multiple times). The orders which are revised or canceled by the seller should not be considered for this rule.

a) # of Seller Confirmations within same business day as Order Placed (E.g.Order Date - May 1st (Sat). Orders confirmed on May 1st will be including in this category).

Each Order = 1

b) # of Seller Confirmations after 2 business days excluding order date (E.g. Order Date - May 1st. Orders confirmed on or after May 4th will be including in this category)

Each Order = 1

Order Placed	Rule #2 a)	Rule #2 b)
Monday	If confirmed on Monday, this order is counted	If confirmed on or after Thursday, this order is counted
Tuesday	If confirmed on Tuesday, this order is counted	If confirmed on or after Friday, this order is counted
Wednesday	If confirmed on Wednesday, this order is counted	If confirmed on or after Monday, this order is counted
Thursday	If confirmed on Thursday, this order is counted	If confirmed on or after Tuesday, this order is counted
Friday	If confirmed on Friday, this order is counted	If confirmed on or after Wednesday, this order is counted
Saturday	If confirmed on Saturday, this order is counted	If confirmed on or after Wednesday, this order is counted
Sunday	If confirmed on Sunday, this order is counted	If confirmed on or after Wednesday, this order is counted

The following six dates of the year are not considered a business day:

- New year Day
- Memorial Day,
- Independence Day (4th of July),
- Labor Day,
- Thanksgiving Day,
- Christmas Day.

Example: 30 Sell Orders
4 Same Business Day (a)
6 3+ Business Days (b)
6.6% Seller Confirmation   sum((b-a)/30). (Round up if .5+)

Rule #2 Star Rating = 3.00 See Rule Thresholds for Star Rating.

If the number of confirmations on the same business day as order placed exceeds the number of confirmations beyond 2 business days (net is a negative number), the % for Rule #2 is 0%.

Seller - Rule #3 Revised / Canceled order history (does not include orders the buyer canceled before revision or seller confirmation).

Minimum of 5 maximum 30 most recently completed or canceled sales last 365 days (excluding current day). If member does not meet the minimum and does not qualify for buy rating, Member Rating is "No Rating"

Each completed revised or seller canceled order = 1

Example: 30 Sell Orders
2 Completed revised orders

3 Canceled orders
16.6% Seller Revised / Canceled   sum(5/30). (Round up if .5+)

Rule #3 Star Rating = 3.00 See Rule Thresholds for Star Rating.

Seller - Rule #4 Average of Buyer Rating from the Buyer Confirmation Page (Auto-confirmed = 4 stars)

Minimum of 5 maximum 30 most recently completed sales last 365 days (excluding current day). If member does not meet the minimum and does not qualify for buy rating, Member Rating is "No Rating"

Example: 30 Sell Orders

Average rating by Buyers = 4.6

Rule #4 Start rating = 4.5. See Final Star Thresholds.

Calculation of final published star rating

If member is Buyer Only (does not meet sell min):   Example

Rule #1 Star Rating = 100% of Member Rating 3.00 * 100% = 3.00

Published Star = 3.00

If member is Seller Only (does not meet buy min):   Example

Rule #2 Star Rating = 25% Member Rating 3.00 * 25% = 0.75

Rule #3 Star Rating = 60% Member Rating 3.00 * 60% = 1.80

Rule #4 Star Rating = 15% Member Rating 4.50 * 15% = 0.68

100% Member Rating = 3.23

Published Star = 3.00

If member is both Buyer and Seller: Example

Buyer Only final star rating = 25% Member Rating 3.00 * 25% = 0.75

Seller Only final star rating = 75% Member Rating 3.23 * 75% = 2.42

100% Member Rating = 3.17

Published Star = 3.00

Rule Thresholds - Round up if .5+

Percent	**Stars**
0% - < 2%	5
2% - < 7%	4
7% - < 20%	3
20% - < 30%	2
30% - < 40%	1
40%+	0

Final Star Thresholds.

Sum of Stars Published Star

0.00 - 0.74 ½ star

0.75 - 1.24 1.0 star

1.25 - 1.74 1 ½ stars

1.75 - 2.24 2.0 stars

2.25 - 2.74 2 ½ stars

2.75 - 3.24 3.0 stars

3.25 - 3.74 3 ½ stars

3.75 - 4.24 4.0 stars

4.25 - 4.74 4 ½ stars

4.75 - 5.00 5.0 stars

The following fields will be displayed on the webpage:

Last 30 Purchases:
Number of orders cancelled as the buyer = x of the most recent y orders.

(y = 30 if there are 30 or more buy orders in the last 365 days. If total number of buy orders is less than 30 in the last 365 days, then y = total number of buy orders)

Last 30 Sales:
Number of Seller Confirmations within same business day as Order Placed = x of the most recent y orders.

Number of Seller Confirmations after 2 business days excluding order date= x of the most recent y orders.

Number of revised or seller canceled order = x of the most recent y orders.

Average rating from Buyers = 4.50

(y = 30 if there are 30 or more sell orders in the last 365 days. If total number of sell orders is less than 30 in the last 365 days, then y = total number of sell orders).

The ratings will will be accompanied with the below description

5 star - Excellent
4 & 4.5 - Good
3 & 3.5 - Fair
2 & 2.5 - Bad
0 & 1.5 - Needs improvement

MatchMoney

MatchMoney page will have the following fields

Field Name	Formula (e.g Current Date is Apr 2)
Available MatchMoney	
Lifetime Earnings	Earnings will include lifetime awarded + current month's earnings
MatchMoney History	
Lifetime Awarded	
Lifetime Utilized	
MatchMoney Activity	
Carry over	Carry over as of 1st of the month.
Awarded	Current month's awarded MatchMoney on 1st.
Utilized	Current month's utilization
Other	
Total Available	
Earnings this month	
Expiring this month	

Julio will provide the source code built for MRX 2.0 which will have the business rules.

~~**Threshold:**~~

~~Any member that sells $2,500 or more (excluding shipping) in a given calendar month will earn 50 basis points (0.5%) in Match Money. Calculation will initiate on the first day of the new month for the previous month order total (based on completion date). Order status must = Completed.~~

~~**Usage:**~~

~~Member will have 2 months to apply the Match Money against new sales orders. Use it or lose it.~~

~~**Business Rules:**~~

- ~~Earnings are calculated based upon Completion Date.~~
- ~~Rewards floor ($2,500) and reward rate (0.5%) will be variables in the configuration file to allow future promo's.~~
- ~~Match Money not used within 2 calendar months will automatically expire. Example: Match Money earned from July orders will expire 12:00:01am EST October 1.~~
- ~~Match Money usage will be first-in-first-out.~~
- ~~Match Money cannot be transferred between locations.~~
- ~~Match Money must be applied by seller during the seller confirmation (after all revisions are accepted). All items must be marked as "available" in order for the "Apply My Match Money" to become live in the seller confirmation page. If field is live (member originally marks all as "available" but then member decides to revise an item, feature will grey out.~~
- ~~Amount applied against an order cannot exceed the lesser of available balance or seller fee for the order.~~
- ~~Member cannot use Match Money to offset seller shipping charges.~~
- ~~Member cannot cash in Match Money.~~
- ~~An email will be sent to all members at the start of the new month disclosing the reward amount and expiration date.~~

~~**Calculation Example:**~~

~~Member has completed sales of $7,345.21 during the month of July (based on completed date, status = Completed). Initial calculation of Match Money is $36.72 ($7,345.21 x .005) to be used by 12:00:01am EST October 1.~~

~~Field/Month~~	~~Jan~~	~~Feb~~	~~Mar~~	~~Apr~~
Earned (item value of completed orders * .005)	$1000 (A1)	$500 (A2)	$600 (A3)	$0 (A4)
Awarded (MatchMoney awarded on the 1st of month)	$0	$1000 (A1 - Expires on Mar 31)	$500 (A2 - Expires on Apr 30)	$600 (A3 - Expires on May 31)
Utilized (MatchMoney utilized)	$0	$200 (B1)	$100 (B2)	$0 (B3)
Carryover (Unused Matchmoney which was awarded previous month)	$0	$0 (C1)	$800 (C2 = If C1 >= B1, A1, else A1+C1-B1)	$500 (C3 = (If C2 >= B2, A2, else A2+C2-B2))
Available (MatchMoney available for utilization)	$0	$800 (A1+C1-B1)	$1200 (A2+C2-B2)	$1100 (A3+C3-B3)
Expiring (MatchMoney expiring at the end of the month)	$0	$0 (C1-B1 or $0 whichever is higher)	$700 (C2-B2 or $0 whichever is higher)	$500 (C3-B3 or $0 whichever is higher)

Reports

When the user lands on the statement page, the page will have fields

Field Name	Example	Data Type	Default	Mandatory / Optional	Control Type	Information
Order Date From	12/31/2017	Date	1st of current month	O	Date Picker	Date Range - Feb 1, 2010 to current date
Order Date To	12/31/2017	Date	current date	O	Date Picker	Date Range - Feb 1, 2010 to current date. Has to be same or greater than "From" Date
NDC	54321-4321-21	Numeric field	Empty	O	Number field	user can enter in either format (with and without hyphen)
Drug name	Nexium	Text field	Empty	O	Text field	The result should contain all the drugs which have the search term partially or fully anywhere within the drug name
Transaction Type	Sales only	Dropdown selection	All	M	Dropdown	Options - All, Sales only, Purchases only.
Run Report					Button	

At least one of the above field is mandatory.

When the user hits the "search" button, the system should provide the two download options:

1. XLS (US 49 - Statement.xlsx)
2. PDF (https___www.matchrx.com_mrx_statement.pdf)

The XLS version will have the format attached. The PDF version will be have the same fields as XLS version. Similar to the attached PDF, the fields Order date and Number will be group per order. All sales order will be grouped and all purchase order will be grouped. Additionally, the pdf version will have summary section at the bottom

The system should also display the report on the screen (similar to PDF) with three hyperlinks (Sales, Purchases and Summary). The hyperlinks will anchor the page to the relevant section.

US 50 - BO List of all Orders in VM

WBS #	
	Key / Summary / Updated / Due / Assignee / Status / Sprint (see below)

Key	Summary	Updated	Due	Assignee	Status	Sprint
MHX-270	WBS 248: BO - VM Order Actions to be made by BO user for order in a lifecycle	Sep 24, 2018 09:53		Swapna.Patnaikuni	IN QA	Sprint 16
MHX-269	WBS 247: BO - Order details from VM	Sep 24, 2018 09:51		Swapna.Patnaikuni	IN QA	Sprint 16
MHX-268	WBS 246: BO - List all orders from VM which are NOT in a lifecycle	May 21, 2018 12:52		Swapna.Patnaikuni	IN QA	Sprint 10
MHX-267	WBS 245: BO - List actions print and export	May 21, 2018 12:52		Swapna.Patnaikuni	IN QA	Sprint 10
MHX-266	WBS 244: BO - Predefined list with filters and Sort	May 21, 2018 12:52		Swapna.Patnaikuni	IN QA	Sprint 10
MHX-265	WBS 243: BO - List all orders from VM which are in a lifecycle Column Spec.	May 21, 2018 12:52		Swapna.Patnaikuni	IN QA	Sprint 10

6 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a back office user of MatchRx, I want the ability to view all Vendor Marketplace orders so that I can know the details of the orders.

End Objective:	To provide a system for the back office users to view by all VM orders and its details
User/Actor:	Back office users of MatchRX
Application:	Salesforce
Trigger:	
Related User Story:	

Related WBS Description:

243	I want to view all orders as a list with columns (as applicable to Seller/Buyer) - Order #; Seller & Buyer stated - Items inside the order (quantity) - Order Status; - Buyer Cancelled; - Date; - Buyer (association); - Buyer State; - Seller (association); - Seller State; - Seller AR; - Product Cost (money); - Fee Seller (money); - Ship Buyer (money); - Ship Seller (money); - Total Ship (money); - Total Buyer (money); - Total Seller (money); - Ship Method ; - Tracking;
244	I want predefined list views with relevant list items filtering, list columns & list sorting for each stage of transaction: (as applicable) - Pending seller confirmation; - Seller revised: - In transit (Pending delivery); - Complete; - Cancelled; - Return; - Exchange; - Pending seller alerts;
245	List actions: - search the list by all columns - Filter by seller/buyer/status - mange view of the list (number of records per page, sorting, navigation); - export the list to CSV/XLS file; - print the list.
246	List all orders as: - Cancelled - Completed - Marked as Return - Marked as exchanged
247	As BO User I want to view all orders as a list with columns: - Order #; Vendor & Buyer stated - Order Status; (corresponding to VM lifecycle) - Items inside the order (quantity) - Partial shipments (Yes/No) - Buyer Cancelled; - Date; - Form of payment (CC or ACH) - Product Cost (money); - MRX Fee (money) - Ship Buyer (money); - Total Ship (money); - Total Buyer (money); - Total Seller (money); - Ship Method - Tracking; (ifmore than one - all of them)
248	BO user to assist /modify order lifecycle: - Set as "confirmed by Vendor" + if partial shipment or not - Set as "tracking #(s) provided by vendor" - Set as return/Exchange - Notes.

Business Rules

BR_Orders Basic Search

The Back office user should be able to search for orders using the Global search

BR_List of Orders Page

The default view, predefined filters, ~~order details fields and automatic task creation~~ (will be implemented in sprint 11/12) are mentioned in the attached excel file

US_50_-_Field_&_Access_Grid_20MAR2018.xlsx

~~During revision, when the BO user sets the status as Return/Exchange/Buyer Revised, salesforce should not update MySQL DB. The item and order details on the webpage will continue to show the values available in MySQL DB. When the BO user sets the status as anything other than Return/Exchange/Buyer Revised , Salesforce should update MySQL and webpage should show the updated values.~~ (will be implemented in sprint 11/12)

~~Updated on May 18 for future sprints 11 and 12:~~

~~US_50_-_Field_&_Access_Grid_18MAY2018.xlsx~~

~~Updated on June 14 for Sprint 12:~~

~~US_50_-_Field__Access_Grid_22MAY2018_-_MG-KP.xlsx~~

~~Updated on August 7:~~

~~US 50 - Field__Access_Grid_07Aug2018.xlsx~~

~~Updated on Aug 28:~~

~~US 50 - Field__Access_Grid_14Aug2018.xlsx - Updates in orange highlight~~

Removed the below requirement

~~During revision, when the BO user sets the status as Return/Exchange/Open Case, salesforce should not update MySQL DB. The item and order details on the webpage will continue to show the values available in MySQL DB. When the BO user sets the status as anything other than Return/Exchange/Buyer Revised, Salesforce should update MySQL and webpage should show the updated values.~~

Update on Sep 11:

US 50 - Field__Access_Grid_11Sep2018.xlsx - Updates in Orange border (Formulae in cells E15 and E18 changed.) and blue highlights

US 51 - VM Buyer My Dashboard

WBS #	<table><tr><th>Key</th><th>Summary</th><th>Updated</th><th>Due</th><th>Assignee</th><th>Status</th><th>Resolution</th><th>Sprint</th></tr><tr><td>MHX-352</td><td>WBS 124: PHP VM REPORTS *Reports - Custom Reports</td><td>Jul 30, 2018 10:34</td><td></td><td>Karthigaichamy Malaimegam</td><td>IN QA</td><td>Unresolved</td><td>Sprint 13</td></tr></table> 1 issue
Document status	APPROVED
Document owner	Raghul Manoharan

UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered buyer of VM website, I want a dashboard to view order statement so that I can keep track of my orders

End Objective:	To provide order statement information to the registered buyer users of the website
User/Actor:	Primary users and Secondary users
Program Type:	Webpage
Trigger:	N/A
Related User Story:	
Related WBS #:	124

Related WBS description

124	Vendor REPORTS Order details report (same columns as order details page from sell history) - based on date range - Order date - Settlement date - Based on SKU ID Buyer REPORTS Order details report (same columns as order details page from sell history) - based on date range - Order date

VM Buyer My Dashboard

The "My dashboard" menu will be on the left pane on all pages once the user logged in.

- Statements

When the user lands on the statement page, the page will have fields

Field Name	Example	Data Type	Default	Mandatory / Optional	Control Type	Information
Order Date From	12/31/2017	Date	1st of the current month	O	Date Picker	Date Range - VM Launch Date to current date
Order Date To	12/31/2017	Date	current date	O	Date Picker	Date Range - VM Launch Date to current date Has to be same or greater than "From" Date
UPC	123456789	Numeric field	Empty	O	Number field	
Product name	Candle	Text field	Empty	O	Text field	The result should contain all the products which have the search term partially or fully anywhere within the product name
Seller Name	ABC	Text Field	Empty	O	Text Field	The result should contain all the sellers which have the search term partially or fully anywhere within the seller DBA

Run Report					Button	

At least one of the above field is mandatory.

When the user hits the "search" button, the system should provide the two download options:

1. XLS (US 51 - vm_buyer_statement.xlsx)
2. PDF

The XLS version and PDF version will have the format attached.

The system should also display the report on the screen (Match-RX_VM_BUY-statement.pdf).

US 52 - VM Seller My Dashboard

WBS #	Key | Summary | Updated | Due | Assignee | Status | Resolution | Sprint MHX-217 | WBS 100: PHP VM - Seller Dashboard | Jul 05, 2018 09:09 | | Karthigaichamy Malaimegam | IN QA | Unresolved | Sprint 12 1 issue
Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a registered seller of VM website, I want an activity page and order statement so that I can keep track of my sales and orders

End Objective:	To provide an activity page and order statement information to the registered seller users of the website
User/Actor:	Primary users and Secondary users
Program Type:	Webpage
Trigger:	N/A
Related User Story:	
Related WBS #:	100

Related WBS description

100	Seller is expected to be paid by MRX on the 15th and 30th of every month. Statment period One is 1 - 15th of the month paid on the 30th Statment period Two is 16 - 31st of the month paid on the 15th of the next month Below e.g. for Statement period One. Three summary sections: Previous Statement period Orders with Sales value, MRX Fee and Net amount. - Order Completed between 16th and 31st of previous month - Return orders completed before 15th of this month (not subject to pay cycle) - Total line item of all the above Current Statement period Orders with Sales value, MRX Fee and Net amount. - Orders Completed between 1 - 15th of this month Third section for orders in process (all order including return which are not completed) The seller should be able to view all orders (and order detail) under each of the above summaries.

VM Seller My Dashboard

The "My dashboard" menu will be on the left pane on all pages once the user logged in. This menu will have two sections

- Activity
- Statements

Activity

The following information should be displayed.

1. Lifetime Sales in $ value (Value of item total in the orders with status "completed")
2. Lifetime Orders (Number of orders with status "completed")
3. Lifetime Quantity Sold (Quantity of item sold in the orders with status "completed")
4. Total # of Open Postings (Open postings = All posting which are displayed on the marketplace. So exclude postings which has qty = 0 or posting status not equal to Active.)
5. Number of stockout items (Number of postings with quantity = 0)
6. Pending Settlement - Prior Period ($ expected to processed by MMS on the upcoming payment date)
7. Pending Settlement - Current Period ($ expected to processed by MMS on the next payment date after the upcoming one)

This section will have the following information represented graphically and the user should have the ability to change the date range)

1. Last 12 months sales in $ for all order statuses (X axis - time, Y axis - Value of item total in the orders)
2. Last 12 months order count for all order statuses (X axis - time, Y axis - Number of orders)
3. Last 12 months quantity sold count for all order statuses (X axis - time, Y axis - Sum of quantity of items found in each order)

This section will have the following information represented as a table.

1. Top ten selling items based on quantity sold. (All postings with same Seller SKU ID should be considered as one item)
2. Top ten selling items based on $ value of the quantity sold. (All postings with same Seller SKU ID should be considered as one item)
3. Top ten favorited items based on the number of times a product has been added to favorite currently (All postings with same Seller SKU ID should be considered as one item)

Statements

When the user lands on the statement page, the page will have fields

Field Name	Example	Data Type	Default	Mandatory / Optional	Control Type	Information
Order Date From	12/31/2017	Date	1st of current month	O	Date Picker	Date Range - VM Launch Date to current date
Order Date To	12/31/2017	Date	current date	O	Date Picker	Date Range - VM Launch Date to current date Has to be same as or greater than "From" Date
Settlement Date From	12/31/2017	Date	1st of current month	O	Date Picker	Date Range - VM Launch Date to current date
Settlement Date To	12/31/2017	Date	current date	O	Date Picker	Date Range - VM Launch Date to current date Has to be same as or greater than "From" Date

UPC	123456789	Numeric field	Empty	O	Number field	
Seller SKU ID	ABc123		Empty	O		
Product name	Candle	Text field	Empty	O	Text field	The result should contain all the products which have the search term partially or fully anywhere within the product name
Seller Name	ABC	Text Field	Empty	O	Text Field	The result should contain all the sellers which have the search term partially or fully anywhere within the seller DBA
Run Report					Button	

At least one of the above field is mandatory.

When the user hits the "search" button, the system should provide the two download options:

1. XLS (US 52 - VM Seller Statement.xlsx)
2. PDF (https___www.matchrx.com_mrx_statement.pdf)

The XLS version will have the format attached. The PDF version will be have the same fields as XLS version. Similar to the attached PDF, the fields Order date and Number will be group per order. Additionally, the pdf version will have summary section at the bottom

The system should also display the report on the screen (similar to PDF).

US 53 - BO Prospects

WBS #	Key	Summary	Updated	Due	Assignee	Status	Resolution	Sprint
	MHX-1319	WBS 209 :BO - MMS integration (Document Upload) for VM	Sep 11, 2018 13:20		Swapna.Patnaikuni	IN QA	Unresolved	Sprint 15
	MHX-256	WBS 216: BO - Data Q integration	Sep 11, 2018 10:16		Swapna.Patnaikuni	DEVELOPMENT	Unresolved	Sprint 16
	MHX-173	WBS 209: PHP - 3.0 ACH Transactions view MMS integration	Jul 11, 2018 10:34		logesh.karthikeyan@htcindia.com	IN QA	Unresolved	Sprint 13
	3 issues							

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a BO user of MatchRX, I want have DataQ information and user-enetered/uploaded information during registration so that I can compare and verify information

End Objective:	To provide an application page for the users to register for MRX 3.0/VM buyer and capture the information in MRX database
User/Actor:	Back office users of MatchRX
Program Type:	Salesforce
Trigger:	
Related User Story:	US 1 - MRX 3.0 & VM Buyer Registration Page & US 12 - VM Wholesaler Registration Page
Related WBS #:	209, 216

Related WBS Description:

209	Everyday, a BO user uses MMS to pulls all financial transactions from Pearl which have the debit transaction date but no ACH date. MMS creates a internal file with these transactions in MMS. MMS then removes the transactions from the internal file if the transaction date is same as today. With DEA # as primary key, MMS appends the banking account details to each of the transaction in the internal file and transform the file to the format the bank will accept for ACH transaction. The BO user then downloads this file from MMS and uploads in the MRX primary bank's online banking page. If the bank returns a success message, the BO user clicks the "Process success" button in the MMS page. MMS then populates the ACH date for all those transactions in Pearl.
216	DEA # or NCPDP # As a BO user, after the member registration, I want to know which values were modified by the pharmacy compared to the DataQ values. As a BO user, I need a screen which displays both member entered information and DataQ information for a particular pharmacy to decide which information is more accurate and edit the member entered information accordingly.

Pharmacy Application Status:

Status	Trigger and rules
Prospect	Default status before a registration starts
New	Once the user submits page 1 of the registration, the application status column of the pharmacy record in prospective member database stored in Salesforce should be updated to "New". The data from the registration form should also be inserted in the prospective member database stored in Salesforce (let's call it user-entered data). Salesforce should never update the DataQ fields The application should be assigned to sales manager. Whenever a document (ACH/Tax form/Cheque) is uploaded on the front-end website, salesforce should update the record with the document uploaded and time stamp it. Salesforce should create a task with application number (hyperlinked) and the name of the document/s uploaded/typed and assign the task to Compliance manager. The task should have the status "Pending Review" Back office user should be able to view both user-entered data and DataQ data in Salesforce
In process	Once the registration application is assigned by the sales manager to a sales rep, the status will be changed to "in process". During the "in process" status, the registration is verified by the compliance team for ownership and licensing.
Pending financial documents	Once verified, the BO user will set the status to "pending financial documents". Once the document is uploaded by the applicant, the web service will transfer the documents/data to MMS document review application and notify Salesforce.

Approved Financial documents	Once the document is reviewed by first BO user, the MMS document review application has to notify Salesforce (Out of scope for HTC). Salesforce has to change the status of the task to "Reviewed" and reassign the task to Accountant (In Scope for HTC) Status = Pending Financial document - Once the document is approved by both the BO users on the MMS document review application, the MMS system has to notify Salesforce (Out of scope for HTC) and the Salesforce will change the application status to "Approved Financial Documents" and task status to "Completed" Status = Anything other than Pending Financial document - Once the document is approved by both the BO users on the MMS document review application, the MMS system has to notify Salesforce (Out of scope for HTC) and the Salesforce will NOT change the application status but change the task status to "Completed"
Rejected	If a BO user wants to reject an application.
Canceled	If the applicant wants to cancel the application, the BO user set the status as canceled on the applicant's behalf
Approved	Once a back office user changes the status to "Approved", link to create login credentials are sent, and a hard copy welcome letter will automatically be generated (two templates developed by MRX – MRX3.0/VM and VM only). Only when an application is approved as a member and the link to create login credentials sent, the user entered data has to be copied to MatchRX database. Salesforce/webservice should communicate the application number and pharmacy ID to MMS so that MMS application can link the pharmacy ID and bank account number for future financial transactions.

VM Seller Application Status:

Application Status	Trigger and rules
Prospect	Default status before a registration starts
New	Once the user submits page 1 of the registration, the application status column of the wholesaler record in prospective member database stored in Salesforce should be updated to "New - WHS". Unlike DataQ prospective member database, the wholesaler prospective member database will be an empty database at the start and will be populated only through wholesaler registration page and back office (salesforce) screens. The application should be assigned to sales manager. Whenever a document (ACH/Cheque/Wholesaler Agreement) is uploaded by Front office user or back office user, salesforce should update the record with the document uploaded and time stamp it. Salesforce should create a task with application number (hyperlinked) and the name of the document/s uploaded/typed and assign the task to Compliance manager. The task should have the status "Pending Review"
In process	Once the registration application is assigned by the sales manager to a sales rep, the status will be changed to "in process". During the "in process" status, the registration is verified by the compliance manager for ownership.
Pending financial documents	Once verified, the BO user changes the status to "pending financial documents". When changed to status "pending financial documents" and if at least one of the documents is yet be uploaded by the user, the system should trigger the Email 3 - link to upload docs. The BO user should also be able to trigger the email via a button in the application record during any status.
Approved Financial Documents	Once the document is reviewed by first BO user, the MMS document review application has to notify Salesforce (Out of scope for HTC). Salesforce has to change the status of the task to "Reveiwed" and reassign the task to Accountant (In Scope for HTC) Status = Pending Financial document - Once the document is approved by both the BO users on the MMS document review application, the MMS system has to notify Salesforce (Out of scope for HTC) and the Salesforce will change the application status to "Approved Financial Documents" and task status to "Completed" Status = Anything other than Pending Financial document - Once the document is approved by both the BO users on the MMS document review application, the MMS system has to notify Salesforce (Out of scope for HTC) and the Salesforce will NOT change the application status but change the task status to "Completed"
Rejected	If a BO user wants to reject an application.
Canceled	If the applicant wants to cancel the application, the BO user set the status as canceled on the applicant's behalf

Approved	Once a back office user changes the status to "Approved", link to create login credentials are sent, and a hard copy welcome letter will automatically be generated in PDF format. Only when an application is approved as a member and the link to create login credentials are sent, the information has to be copied to MatchRX database. Salesforce/webservice should communicate the application number and Company ID to MMS so that MMS application can link the Company ID and bank account number for future financial transactions.

Business Rules:

Data Fields

The following information should be sent to MMS document review application. More information can be found using the link on section heading which is hyperlinked

1A.Application Number (Applicable for Pharmacy Application. Not applicable for VM Seller Application)

Field Name	Example	Data Type	M/O/R*
Application Number	123131	Numeric (min 6, max 6)	M
Name (Legal entity)	XYZ Pharmacy LLC	Varchar (min 1, max 60)	M
DBA	ABC Pharmacy	Varchar (min 1, max 60)	M
DEA (only for pharmacy application)	AB1234567/A01234567	First character has to be Alphabet. Next character is alphanumeric and last 7 characters has to be Numeric (min 9, max 10)	O

1B.Application Number (Applicable only for VM Seller Application)

Field Name	Example	Data Type	M/O/R*	Control Type
Application Number	523131	Numeric (min 6, max 6)	M	Text box
Name (Legal entity)	XYZ LLC	Varchar (min 1, max 60)	M	Text box
DBA	ABC wholesalers	Varchar (min 1, max 60)	M	Text box
Billing Address 1	100 E Main St.	Varchar (min 1, max 55)	M	Text box
Billing Address 2	Ste 2A	Varchar (min 1, max 55)	M	Text box
Billing City	Royal Oak	Varchar (min 1, max 30)	M	Text box
Billing State	Michigan	Varchar (min 1, max 30)	M	Text box
Billing Zip	48201-1234	Numeric (min 5, max 9)	M	Text box
Pharmacy Phone	123-456-7890	Numeric (min 10, max 10)	M	Text box
Email Address	abc@xyz.com	Varchar (min 1, max 50)	M	Text box

2. ACH Info section

Field Name	Example	Data Type	M/O/R*	Remarks
Account Number	1234567	Numeric (min 4, max 20)	M	
Confirm Account Number	1234567	Numeric (min 4, max 20)	M	
Routing Number	123456789	Numeric (min 9, max 9)	M	
Financial Institution	Chase	Alpha numeric (min 1, max 50)	M	Prepopulate using ABA API (https://routingnumber.aba.com/default1.aspx)

Account Type	Checking	Checking/Savings	M	
Uploaded ACH f orm	N/A	PDF/ jpeg	O/M	Upload File size restriction: 3 MB. The user can upload ACH form or use e-sign or both but at least one is mandatory if any field in this section is filled.
E-Signature	John Smith	Varchar (min 2, max 51)	O/M	TERMS OF ACCEPTANCE and SIGNATURE I, [Applicant's name], am authorized to approve the banking information and warrant the truthfulness of the information provided in this application. Electronic Signature: * Please type your First and Last Name I understand that checking this box constitutes a legal signature confirming that I acknowledge and agree to the above Terms of Acceptance.
Date	12-31-2017	Numeric	M	

3.Check section

Field Name	Example	Data Type	M/O/R*	Remarks
Uploaded voided check	N/A	PDF/image	O	Upload File size restriction: 3 MB

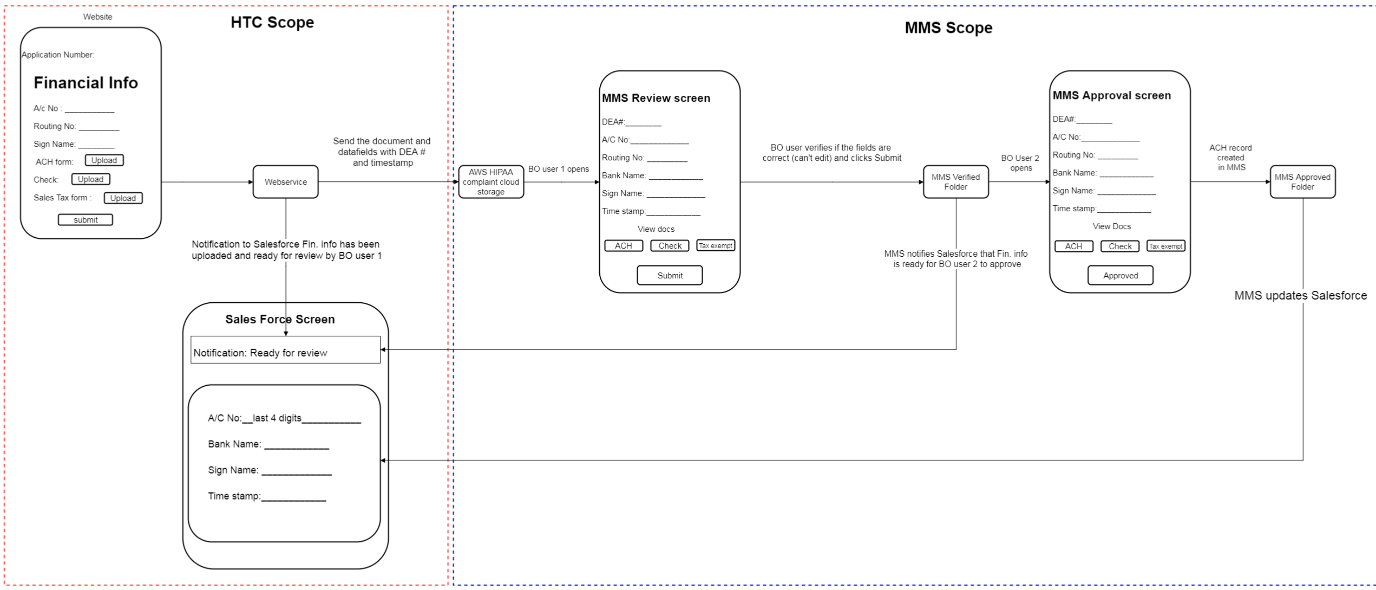
4.Tax-exempt form section (Not applicable for VM Seller Application)

Field Name	Example	Data Type	M/O/R*	Remarks
Uploaded Tax exempt form	N/A	PDF/ jpeg	O	Upload File size restriction: 3 MB Sample file: Uniform-Sales-and-Use-Certificate-5-2016a.pdf

5.Wholesaler Agreement section (Applicable only for VM Seller Application)

Field Name	Example	Data Type	Default Value	M/O/R *	Control Type	Remarks
Upload Wholesaler Agreement	N/A	PDF/ jpeg	Empty	O	File Upload	File size restriction: 3 MB. File to download Wholesaler agreement which will be upload by Back office user. The user is expected to download, sign and upload the signed form. (Should be stored in MatchRX DB and not in MMS)

Document Flow



DataQ (Out of scope for HTC)

The SF DataQ table is updated using the DataQ table stored in the MRX server. The DataQ table in MRX server is updated with an FTP file from DataQ.

The MRX server has to update the Salesforce DB with the latest data and provide the list of pharmacy and the fields that are updated by your daily/weekly/monthly file, so that the salesforce system can alert the BO user when fields such as owner name have changed.

Data field format can be found in the below file starting from section 6.1
NCPDP dataQ Implementation Guide v3.1.pdf

The DataQ table found in MRX server should send the following fields to Salesforce

1. DQ Account Name
2. DQ County
3. DQ DBA
4. DQ DEA Exp Date
5. DQ DEA Number
6. DQ Dispenser Class Code
7. DQ Email Address
8. DQ Fax Phone
9. DQ Federal Tax ID
10. DQ First Name
11. DQ Last Name
12. DQ NPI Number
13. DQ Office Phone
14. DQ Primary Address City
15. DQ Primary Address Postal code
16. DQ Primary Address State
17. DQ Primary Address Street
18. DQ Primary Address Street 2
19. DQ Primary Email
20. DQ Primary First Name
21. DQ Primary Last Name
22. DQ Primary Mobile
23. DQ Primary Title
24. DQ Provider Type Code Primary
25. DQ Provider Type Code Secondary
26. DQ Provider Type Code Tertiary
27. DQ State License Exp Date
28. DQ State License Number
29. DQ Shipping Address City
30. DQ Shipping Address Postal code
31. DQ Shipping Address State
32. DQ Shipping Address Street
33. DQ Shipping Address Street 2
34. DQ Hours of Operation

35. DQ Physical Location Store Open Date
36. DQ Physical Location Store Closure Date
37. DQ NCPDP Number

US 54 - BO VM Reports

WBS #	<table><tr><th>Key</th><th>Summary</th><th>Updated</th><th>Due</th><th>Assignee</th><th>Status</th><th>Sprint</th></tr><tr><td>MHX-258</td><td>WBS 268: BO - VM Reports and Statistics</td><td>Jul 23, 2018 09:29</td><td></td><td>Swapna.Patnaikuni</td><td>IN QA</td><td>Sprint 13</td></tr><tr><td>MHX-233</td><td>WBS 252: BO - 3.0 Summary Activity info by member with Search filters</td><td>Jul 09, 2018 07:45</td><td></td><td>Swapna.Patnaikuni</td><td>IN QA</td><td>Sprint 12</td></tr></table> 2 issues
Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a back office user of VM, I want the ability to run reports so that I can export to xls format and perform analysis

End Objective:	To provide the ability to run different reports
User/Actor:	Back office users of VM
Application:	Salesforce
Trigger:	
Related User Story:	

Related WBS Description:

252	I want to view a snapshot of activity by member with the following search filters: - Sales Rep (selected or All) - Activity date from : to - ACH date (membership date) from : to - Member status (Any, active, canceled, suspended, active & suspended) - Export results to CSV file Results displayed: - Account Rep - Pharmacy DBA - Pharmacy Status - DEA - State - Primary Contact & Phone - ACH Date - Last login date - Last Post date - Last Buy date - Last Sell date - # of Current Posts - # of Lifetime Posts - Total Sales (within activity date range) - Total Selling Fees (within activity date range) - Total Match Money Earned (within activity date range) - Total Match Mondy Used (within activity date range) - Total Sales (within activity date range) - Total Purchases (within activity date range) - Total Postings (within activity date range) This is already in place in MRX 2.0. Salesperson can only view activity for their own members with a lookback of 13 months. Management can view activity across all members and dates.
268	As BO user, I want to display a monthly revenue report as a list (one month = one row) with columns: As MRX I want to display a daily revenue report as a list (one day = one row) with columns: - Date; - Total orders; - Orders amount; - VM Fee; - Items total. I want to: - export the report to XLS/CSV; - print the report.

Business Rules

Admin Dashboard Report

Only the BO user with Admin user role will be able to run this report. The report will include all order statuses and posting statuses.

The BO user should be able to select

- The activity date range (mandatory). The default date range will be 1st of the current month to current date of the current month.
- The membership date range (mandatory). The default date range will be Feb 1, 2010 to current date.
- Sales Rep/Utilization Manager Name (mandatory). The default will include all sales rep and utilization manager. The user will be able to select multiple.
- Membership status (mandatory). The default will include all status. The user will be able to select multiple.
- Membership Type (mandatory). Radio button - VM Buyer / VM Seller

The report will have the details found in the attached file. The information will be specific to VM application

VM Buyer - US 53 - Admin VM Buyer Dashboard Report.xlsx

VM Seller - US 53 - Admin VM Seller Dashboard Report.xlsx

Sales Rep Dashboard Report

The BO users with sales rep and utilization manager will be able to run this report. A sales rep/utilization manager report will only contain the Pharmacies that are currently assigned to the user. A Sales rep/Utilization manager will only be able to run his/her own report. A Sales rep/Utilization manager will not be able to run other BO user's report. The report will include all order statuses and posting statuses.

The BO user should be able to select

- The activity date range (mandatory). The default date range will be 1st of current month to current date of current month.
- The membership date range (mandatory). The default date range will be Feb 1 2010 to current date.
- Membership status (mandatory). The default will include all status. The user will be able to select multiple.

The report will have the details found in the attached file.

The information will be specific to VM application

VM Buyer - US 53 - Sales Rep VM Buyer Dashboard Report.xlsx

VM Seller - US 53 - Sales Rep VM Seller Dashboard Report.xlsx

Sales Rep:

The max activity and membership date range will be the previous 13 calendar months including current month. Rep will be able to select a custom date range within the 13 months.

Example: Current date is April 13, 2018. The range available for selection is March 1, 2017 to April 13, 2018.

Utilization Manager:

No max activity or membership date range restrictions for utilization manager.

Revenue Reports

Only Admin and Accountant user role will have access to this report. A BO user should be able to run two reports (daily report & monthly report) with the following fields

1. Number of orders
2. Item total of all orders
3. Total of MatchMH fee
4. Total of Shipping charge
5. Total number of items sold (If an order contains an item with qty 3, it is considered as 1 item sold)
6. Total quantity sold (If an order contains an item with qty 3, it is considered as 3 quantity sold)

This report will have the following filters:

1) Order Status (Mandatory): Default will be all. Multiple statuses can be selected.

2) Date Range (Unlimited) (Mandatory)

3) Membership status (mandatory). The default will include all status. The user will be able to select multiple.

Please refer Pearl Accounting Revenue Report / Monthly Revenue Report for better understanding.

US 55 - BO User Activity

WBS #	<table><tr><th>Key</th><th>Summary</th><th>Updated</th><th>Due</th><th>Assignee</th><th>Status</th><th>Sprint</th></tr><tr><td>MHX-1254</td><td>WBS 269: PHP Review User Activity Log</td><td>Jul 20, 2018 10:36</td><td></td><td>Senthil Vasan</td><td>IN QA</td><td>Sprint 13</td></tr><tr><td>MHX-1253</td><td>CLONE - WBS 269: BO Review User Activity Log</td><td>Jul 23, 2018 09:30</td><td></td><td>Swapna.Patnaikuni</td><td>IN QA</td><td>Sprint 13</td></tr><tr><td>MHX-323</td><td>WBS 269: BO Review User Activity Log</td><td>Jun 06, 2018 22:02</td><td></td><td>Swapna.Patnaikuni</td><td>IN QA</td><td>Sprint 10</td></tr></table> 3 issues
Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a back office user of MatchRx, I want the ability to find who performed a particular action so that I can audit

End Objective:	To provide the ability to audit major actions by capturing the name of the user and timestamp
User/Actor:	Back office users of MatchRX
Application:	Salesforce
Trigger:	
Related User Story:	

Related WBS Description:

269	To review on UI activity log per user or aggregated per all users of that pharmacy. Stating the date and activity details. Filtering by date/user/activity type This log should be visible only to the BO user Logs contain only transactional activities (e.g. inclusded - Add to cart, purchased, canceled. Excluded - clicks and page views)

Business Rules

The contact (link of the front or back-office user) and timestamp should be displayed for each of the below actions.

#	Action	Page
1	Who created the contact?	Contacts Details Page
2	Who last edited/deleted the contact?	Contacts Details Page
3	Who created the posting?	Posting Details Page

4	Who last edited/deleted the posting?	Posting Details Page
5	Who placed the order as a buyer?	Order Details Page
6	Who last performed the seller confirmation/revision/cancellation as a seller? (MRX 3.0 only)	Order Details Page
7	Who last performed acceptance of revised order/cancellation as a buyer? (MRX 3.0 only)	Order Details Page
8	Who last performed the buyer confirmation / Open case as a buyer after the order is delivered? (MRX 3.0 only)	Order Details Page
9	Who last performed the seller acceptance/cancellation as a seller? (VM Only)	Order Details Page
10	Who added the tracking number as a seller? (each tracking number should be assigned a user) (VM Only)	Order Details Page
11	Who last performed cancellation/revision as a buyer? (VM Only)	Order Details Page
12	Who last performed the buyer confirmation / Open case as a buyer after the order is delivered? (VM Only)	Order Details Page

US 56 - BO Emails

WBS #

Key	Summary	Updated	Due	Assignee	Status	Sprint
MHX-1244	CLONE - WBS 214: BO - E-mail templates management for MRX Users	Jun 25, 2018 21:57		Swapna.Patnaikuni	IN QA	Sprint 10
MHX-1243	CLONE - WBS 213: BO - E-mail sending functionality	Jun 25, 2018 21:58		Swapna.Patnaikuni	IN QA	Sprint 10
MHX-230	WBS 215: PHP List of sent emails as MRX	Jul 09, 2018 07:45		Swapna.Patnaikuni	IN QA	Sprint 12
MHX-229	WBS 266: BO - E-mail templates management for BO Users	Jul 30, 2018 05:57		Swapna.Patnaikuni	IN QA	Sprint 13
MHX-228	WBS 214: BO - E-mail templates management for MRX Users	Jun 25, 2018 21:58		Swapna.Patnaikuni	IN REVIEW	Sprint 9
MHX-227	WBS 213: BO - E-mail sending functionality	Jun 25, 2018 21:59		Swapna.Patnaikuni	IN REVIEW	Sprint 9
MHX-191	WBS 267: BO - List of sent emails	Sep 11, 2018 13:19		Swapna.Patnaikuni	IN QA	Sprint 15
MHX-189	WBS 265: BO - E-mail sending functionality	Jul 30, 2018 05:57		Swapna.Patnaikuni	IN QA	Sprint 13

8 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

1.2 Marketing Emails
1.3 Conversational Emails (Integration with Gmail or Outlook in consideration)

User Story

As a back office user of MatchRx, I want to able to send emails to Salesforce contacts and view email history

End Objective:	To provide the ability to send emails to Salesforce contacts and view email history from Salesforce screen
User/Actor:	Back office users of MatchRX
Application:	Salesforce
Trigger:	
Related User Story:	

Related WBS Description:

213	As BO user I want to manage a list of senders (sending on behalf of MRX): - From name; - Email address; - Signature. Need integration with SendGrid.
214	As MRX I want to send bulk emails to members and I want to use templates. Templates allow to use 3 variables (dynamic data): current year, first name, last name. To send the message I want to use a form: - Template (drop down); - Email address TO (drop down); - Email address from (string); - Subject (string, allows HTML tags); - Body. Form buttons: Preview, Send e-mail, Clean data.
215	AS MRX I want to view list of sent emails and search by email address and subject line.
265	As BO user I want to manage a list of senders (sending on behalf of MRX): - From name; - Email address; - Signature. Need integration with SendGrid.
266	As BO user, I want to send bulk emails to members and I want to use templates. Templates allow to use 3 variables (dynamic data): current date, first name, last name. To send the message I want to use a form: - Template (drop down); - Email address TO (drop down); - Email address from (string); - Subject (string, allows HTML tags); - Body. Form buttons: Preview, Send e-mail, Clean data.
267	AS BO user, I want to view list of sent emails and search by email address and subject line.

Business Rules

Email types	Information	Example
Transactional Emails	Emails triggered by an action by FO user or BO user. Usually, sent through PHP webservice and SendGrid. Prospect related emails are sent through Salesforce.	Order Cancellation email
Marketing Emails	Emails sent by BO users to selected Salesforce contacts. Emails are sent through Salesforce and iContact	Coupon code email
Conversational Emails	Emails sent by a BO user to a specific Salesforce contact. Emails are sent through Salesforce	An email to answer a customer's question

All three emails types should be displayed separately on Salesforce screen.

Transactional Emails

The list of transactional emails can be found in US 30 - Notifications and US 47 - Notifications

On the accounts page, a BO user should be able to search the transactional emails sent to contacts of the account. The user should be able to search by email subject keyword and/or email date range. Salesforce will display a predefined number of results. The BO user has to refine the search to get better results. When clicked on a particular email, Salesforce should display the content of the entire email. The emails should not be stored in SF DB and should not count towards SF DB storage.

The BO user will be able to search only the email and not the SMS and Push Notifications.

Marketing Emails

A BO user should be able to select a list of contacts (related to prospects/accounts) and send marketing emails to the selected contacts. Salesforce should be able to filter contacts who are on the "do not email" or "do not fax" lists. The templates will be stored in iContact web application. Template creation and management are out of scope for HTC.

On the accounts/prospects page, a BO user should be able to see the list of marketing emails sent to contacts of the account/prospects. When clicked on a particular email, Salesforce should display the content of the entire email. The emails should not be stored in SF DB and should not count towards SF DB storage.

Salesforce should also display the metrics on Salesforce screen as provided by iContact for Salesforce.

Conversational Emails (Integration with Gmail or Outlook in consideration)

A BO user should be able to send an email to one or more contacts (related to prospects/accounts). the BO user should be able to select a saved Canned response and edit it or compose an email. The canned response can be stored in Salesforce, if required. The content of the canned response has to be provided by MatchRX.

On the accounts/prospects page, a BO user should be able to search the conversational emails sent to contacts of the account/prospects. The user should be able to search by email subject keyword and/or email date range. When clicked on a particular email, Salesforce should display the content of the entire email. If integrated with Gmail or Outlook, the emails should not be stored in SF DB and should not count towards SF DB storage. If it is not integrated, the email can be stored in SF DB and can count towards SF DB Storage.

US 57 - Chat

WBS #

Key	Summary	Updated	Due	Assignee	Status	Sprint
MHX-324	WBS 270 : BO Support Chat	Jul 23, 2018 09:31		Swapna.Patnaikuni	IN QA	Sprint 13
MHX-278	WBS 123: PHP VM Support Chat	Jul 05, 2018 09:09		Senthil Vasan	IN QA	Sprint 12
MHX-276	WBS 69: PHP Support Chat	Jul 05, 2018 09:10		Senthil Vasan	IN QA	Sprint 12

3 issues

Document status	APPROVED
Document owner	Raghul Manoharan
UI Developer	
Developers	
QA	

Table of Contents

User Story

As a front office user (before and after login) of MatchRX/VM, I want to be able to chat with a BO user to get help and information.

As a back office user of MatchRX/VM, I want to able to respond to chats initiated by front office user (before and after login) of MatchRX/VM to help them.

End Objective:	To provide the ability to connect FO and BO user for chat
User/Actor:	Non-logged front office user, Logged in front office user and Back office users of MatchRX/VM
Application:	Web and Salesforce
Trigger:	
Related User Story:	

Related WBS Description:

69	Third party chat API integration
123	SUPPORT CHAT INTEGRATION
270	Displaying on UI means show user log in terms of: User, action, date of action. Search by user, filter by date

Business Rules

Front Office

The webpage has to display if the BO chat personnel is currently online or offline.

After the end of the chat session, the FO user will have the following non-mandatory options

1. Email the chat transcript to the email address provided before initiation of the chat session
2. Rate the conversation
3. Provide feedback as comments (250 characters)

If the BO user is offline, the system has to send the information collected and question as an email to "customerservice@matchrx.com

Before Login

The webpage should request the following mandatory information to initiate the chat session

1. Full Name
2. Pharmacy/Company Name
3. Email Address
4. Question text box(250 characters)

Guest Logged in (applicable only in MRX 3.0)

The webpage should request the following mandatory information to initiate the chat session

1. Full Name
2. Pharmacy/Company Name
3. Email Address
4. Question (250 characters)

The NCPDP number associated with the guest login should be sent to Livechat BO screen at the start of the chat session.

Logged in

The webpage should request the following mandatory information to initiate the chat session.

1. Full Name (Pre-filled and editable)
2. Pharmacy/Company Name (Pre-filled and editable)
3. Email Address (Pre-filled and editable)
4. Question (250 characters)

The Pharmacy ID or the Company ID associated with the login should be sent to Livechat BO screen at the start of the chat session.

Back Office

The BO user will use a separate application outside of Salesforce to chat with the FO user.

After the end of the chat session, the BO user should be able to view the transcript of chat on Salesforce screen.

If NCPDP/Pharmacy ID/company ID is provided by the webpage, the Salesforce system has to link the transcript to corresponding prospect/account.

If NCPDP/Pharmacy ID/company ID is NOT provided by the webpage, the Salesforce system should provide the ability to the BO user to link the transcript to any prospect/account.

All linked and un-linked chat transcripts should be organized in a separate tab in Salesforce.

Livechat should store canned responses.