

# **PEARL (Partner Engagement and Relationship Tools) Vendor Onboarding Training Manual**

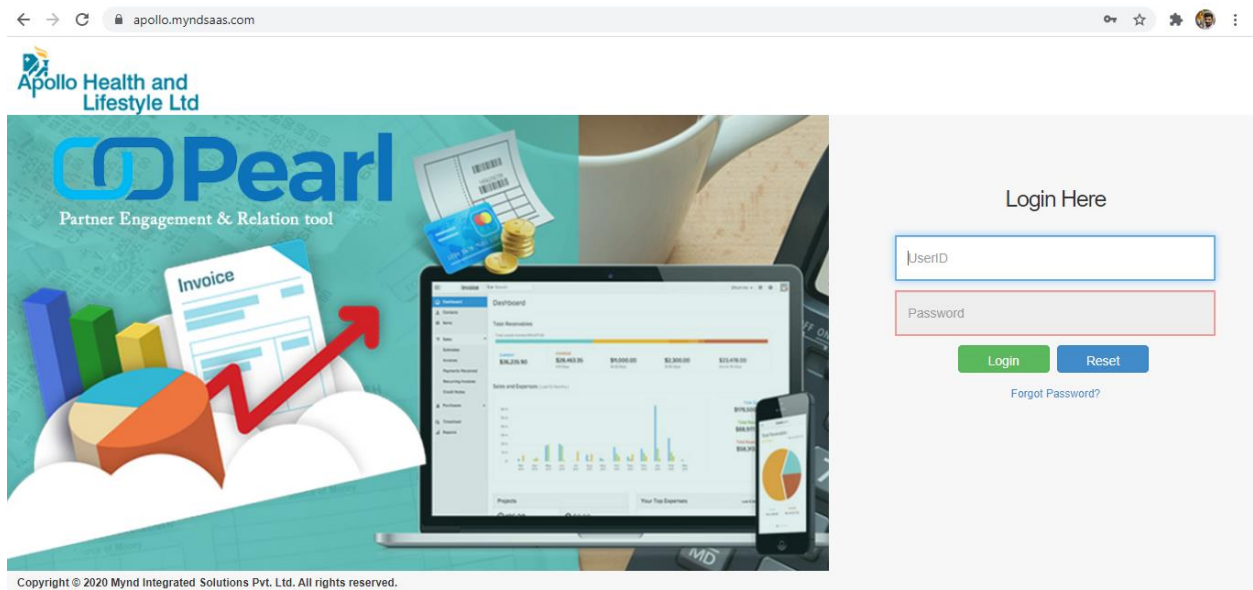


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## 1. PEARL Login Page



User has to login in PEARL as per below details:

**URL:** <https://apollo.myndsas.com/>

**Username:** Username as Employee Code or Vendor Code

**Password:** As per password generated by user in PEARL through email notification.

## Home Page

### User Login details

**Username:** Username as Employee Code or Vendor Code

**Password:** As per password generated by user in PEARL through email notification.

Apollo Health and Lifestyle Ltd. Welcome , Requester Your Role REQUESTER

HOME REPORTS DOCUMENT

Document Type : [ ]

Need To Act (0) My Request (0) History (0) Draft (0)

Export to Excel

Action	SYSTEM ID	SUBJECT	STATUS	CREATED BY	RECEIVEDON	PENDING DAYS
No records available.						

20 items per page No items to display

- Required user can raise Vendor creation request and status of same can be checked as mentioned in below steps.

## 2. Vendor Creation Request

Path: Document > vendor Creation

### Vendor Creation Form

Apollo Health and Lifestyle Ltd. Welcome , Requester Your Role REQUEST...

HOME REPORTS DOCUMENT

#### Vendor Creation

Nature of Vendor*	Others	Apollo Legal Entity*	AHLL Diagnostics Limited
Operating Unit*	AHLL_Corporate	Sub Department*	Cardiology
Vendor Name*	Apollo Pharmacy	Email*	anuj.gupta@myndsol.com
Contact Person*	Vishal Agrwal	Contact Number*	8102000010
Reason for Onboarding Vendor*	Supplier	Remarks	
	<input checked="" type="checkbox"/> Oracle		
Applications*	<input checked="" type="checkbox"/> IT Dose	Credit Period*	30 days
	<input type="checkbox"/> Insta		
	<input type="checkbox"/> IDP Meta		
Supplier Category*	Opex		

Save

- Apollo legal Entity shows data from Company master.

- Sub department shows data from sub department master.
- \* Marked fields are mandatory at user level.
- Save Button is used to save document, If moved to different page without save then need to fill required details again.

## Vendor Creation Submission Form

The screenshot shows the 'Vendor Creation' form. The 'Applications' dropdown menu is open, showing options: Oracle, IT Dose, Insta, and DR Meta. A green pop-up message is displayed in the center of the form, stating 'System DOC ID is 3139175' and 'Temp Vendor ID is VC1017' with a 'Close' button.

- User will get above pop up screen on saving vendor creation request with Doc ID and Temp Vendor ID.

## Home Page View

The screenshot shows the 'Home Page View' with a table of documents. The 'Document Type' is set to 'Vendor Creation'. The table has columns: Action, SYSTEM ID, SUBJECT, STATUS, CREATED BY, RECEIVED ON, and PENDING DAYS. The first row shows a document with SYSTEM ID 3139175, SUBJECT 'Vendor Creation', STATUS 'Dept SPOC Approval', CREATED BY 'Requester', RECEIVED ON '02/11/2020', and PENDING DAYS '0'. A 'View Details' button is highlighted next to the first row.

Action	SYSTEM ID	SUBJECT	STATUS	CREATED BY	RECEIVED ON	PENDING DAYS
<a href="#">View Details</a>	3139175	Vendor Creation	Dept SPOC Approval	Requester	02/11/2020	0

- Requester can view the documents created by him/her and current status of the document.
- Details can be checked by clicking View details as highlighted above and below Doc detail page will appear.

## Vendor Creation Request Doc Detail Page View

Logged In User : Varun Sharma | Role : APPROVER

Workflow History:

- Superuser (CREATOR) UPLOADED 28 Sep 2020 15:00:34
- Sunil Gauri (USER) Dept SPOC Approval 28 Sep 2020 17:18:11
- Yogesh kumar RECONSIDERED 28 Sep 2020 17:19:17
- Superuser (CREATOR) UPLOADED 28 Sep 2020 17:20:50
- Sunil Gauri (USER) Dept SPOC Approval 28 Sep 2020 17:26:46
- Varun Sharma

Approval Form:

Comm Fin Approval Remarks:

Credit Period\*:

Credit Limit:

Attachment:

Approve

CURRENT	HISTORY	Vendor Creation- [System Document ID: 3080151]	
Created By	Superuser	Creation Date	28/09/20 - 15:00:34
Current Status	Commercial Fin Approval	Nature of Vendor	Others
Apollo Legal Entity	Apollo Specialty Hospitals Private Limited	Operating Unit	ADCL_Corporate
Sub Department	Cardiology	Vendor Name	Ashish Asthana
Email	Varun.s@myndsol.com	Contact Person	Ashish Kumar Asthana
Contact Number	8700192679	Reason for Onboarding Vendor	Testing

- Doc detail page view of document shows the information in detail to user with respect to data entered by him/her along with movement details and future movement.

### 3. Vendor Creation Approvals

#### 1-Dept SPOC Approval

##### User Login Details

**Username:** Username as Employee Code or Vendor Code

**Password:** As per password generated by user in PEARL through email notification.

## Email Notification



Mon 02-11-2020 16:21

no-reply@myndsol.com

Vendor Creation Request for Approval.

To Varun.s@myndsol.com

Dear Sunil Gaur,

This is to inform you that New Vendor Creation Request is generated on Portal and due for your Action -

Summary of Request is given below -

Vendor Name : Apollo Pharmacy.  
Contact Person Name : Vishal Agarwal.  
Contact Person mobile no. : .8102000010  
Contact Person E-mail id : [anuj.gupta@myndsol.com](mailto:anuj.gupta@myndsol.com)  
Sub Department : Cardiology  
Created By : Requester

Please Approve/Reject Request within SLA Period

[Click Here](#) to Login on Pearl Portal using your User ID and Password

Regards

Procurement Team

Apollo Hospitals

Email: [Apollohelpdesk@Apollo.com](mailto:Apollohelpdesk@Apollo.com)

This is a system generated mail. Please do not reply to this mail.

- Next approver will receive the above email notification to approve the document arrived in his/her bucket.



## Dept SPOC Home Page

Document Type : **Vendor Creation**

**Need To Act (1)** | My Request (0) | History (5) | Draft (0)

Export to Excel

Action	SYSTEM ID	SUBJECT	STATUS	CREATED BY	RECEIVED ON	PENDING DAYS
<a href="#">View Details</a>	3139175	Vendor Creation	Dept SPOC Approval	Requester	02/11/2020	0

20 items per page | 1 - 1 of 1 items

- Approver can view the documents pending in need to act for further action.

## Vendor Creation Doc Detail Page

Welcome to eDMS Control Panel > Welcome to eDMS Control Panel > Doc Detail Page

apollo.myndsas.com/NewDocDetail.aspx?DOCID=3080151

Logged In User : Varun Sharma | Role : APPROVER

Approve Reconsider

Superuser (CREATOR) UPLOADED 28 Sep 2020 15:00:34 > Sunil Gaur(#USER) Dept SPOC Approval 28 Sep 2020 17:18:11 > Yogesh kumar RECONSIDERED 28 Sep 2020 17:19:17 > Superuser (CREATOR) UPLOADED 28 Sep 2020 17:20:50 > Sunil Gaur(#USER) Dept SPOC Approval 28 Sep 2020 17:26:46 > Varun Sharma

**Approve**

Comm Fin Approval Remarks

Credit Period\* 45 days

Credit Limit 0

Attachment

**Vendor Creation- [System Document ID: 3080151]**

Created By	Superuser	Creation Date	28/09/20 - 15:00:34
Current Status	Commercial Fin Approval	Nature of Vendor	Others
Apollo Legal Entity	Apollo Specialty Hospitals Private Limited	Operating Unit	ADCL_Corporate
Sub Department	Cardiology	Vendor Name	Ashish Asthana
Email	Varun.s@myndsol.com	Contact Person	Ashish Kumar Asthana
Contact Number	8700192679	Reason for Onboarding Vendor	Testing

- Approver can view the details of document created in explained manner in above.

## Approval Screen

Logged In User : Varun Sharma | Role : APPROVER

Approve Reconsider

Superuser (CREATOR) UPLOADED 28 Sep 2020 15:00:34

Sunil Gaur(#USER) Dept SPOC Approval 28 Sep 2020 17:18:11

Yogesh kumar RECONSIDERED 28 Sep 2020 17:19:17

Superuser (CREATOR) UPLOADED 28 Sep 2020 17:20:50

Sunil Gaur(#USER) Dept SPOC Approval 28 Sep 2020 17:26:46

Varun Sharma

Approve

Comm Fin Approval Remarks

Credit Period\* 45 days

Credit Limit 0

Attachment

CURRENT HISTORY Vendor Creation - [System Document ID: 3080151]

Created By	Superuser	Creation Date	28/09/20 - 15:00:34
Current Status	Commercial Fin Approval	Nature of Vendor	Others
Apollo Legal Entity	Apollo Specialty Hospitals Private Limited	Operating Unit	ADCL_Corporate

- Approver has to click on approve to process the document to next stage.

## Reconsider Screen

Logged In User : Varun Sharma | Role : APPROVER

Approve Reconsider

Superuser (CREATOR) UPLOADED 28 Sep 2020 15:00:34

Sunil Gaur(#USER) Dept SPOC Approval 28 Sep 2020 17:18:11

Yogesh kumar RECONSIDERED 28 Sep 2020 17:19:17

Superuser (CREATOR) UPLOADED 28 Sep 2020 17:20:50

Sunil Gaur(#USER) Dept SPOC Approval 28 Sep 2020 17:26:46

Varun Sharma

Reconsider

Comm Fin Reconsider Reason\*

Attachment

CURRENT HISTORY Vendor Creation - [System Document ID: 3080151]

Created By	Superuser	Creation Date	28/09/20 - 15:00:34
Current Status	Commercial Fin Approval	Nature of Vendor	Others
Apollo Legal Entity	Apollo Specialty Hospitals Private Limited	Operating Unit	ADCL_Corporate
Sub Department	Cardiology	Vendor Name	Ashish Asthana
Email	Varun.s@myndsol.com	Contact Person	Ashish Kumar Asthana
Contact Number	8700192679	Reason for Onboarding Vendor	Testing

- Approver has to click on reconsider to revert back the document if any changes to be required to be done by the creator.
- Dept reconsider Reason is a mandatory field as \* can be seen.

## Document Approved Message

apollo.myndsas.com says  
Action Completed Successfully

**Approve Document**

Dept Approval Remarks: Ok and Approved

Approve

S.No	User
1	
2	

S.No	User/Role to Action	STAGE	TAT
------	---------------------	-------	-----

- Approver will get the pop up message on both approver and reconsider action > Click Ok to finish

**\*\* If Nature of Vendor is Others, Document will go to Comm Finance**

**If Nature of Vendor is Implant, Document will go to Procure approval**

## 2- Commercial Fin Approval (Nature of vendor is others for used case)

### User Login Details

**Username:** Username as Employee Code or Vendor Code

**Password:** As per password generated by user in PEARL through email notification.

## Commercial Fin Home Page

Document Type : **Vendor Creation**

**Need To Act (2)** | My Request (0) | History (5) | Draft (0)

Action	SYSTEM ID	SUBJECT	STATUS	CREATED BY	RECEIVED ON	PENDING DAYS
<a href="#">View Details</a>	3139175	Vendor Creation	Commercial Fin Approval	Requester	02/11/2020	0
<a href="#">View Details</a>	3080151	Vendor Creation	Commercial Fin Approval	Superuser	28/09/2020	35

Export to Excel

1 - 2 of 2 items

- Next Approver can view the documents pending in need to act for further action.
- Approver can check details by clicking view details and doc detail page will open in a separate tab then only he/she can approve or reconsider the document.

## Vendor Creation Doc Detail Page

Logged In User : Varun Sharma | Role : APPROVER

[Approve](#) [Reconsider](#)

Superuser (CREATOR) UPLOADED 28 Sep 2020 15:00:34

Sunil Gaur(#USER) Dept SPOC Approval 28 Sep 2020 17:18:11

Yogesh kumar RECONSIDERED 28 Sep 2020 17:19:17

Superuser (CREATOR) UPLOADED 28 Sep 2020 17:20:50

Sunil Gaur(#USER) Dept SPOC Approval 28 Sep 2020 17:26:46

Varun Sharma

**Approve**

Comm Fin Approval Remarks

Credit Period\* 45 days

Credit Limit 0

[Approve](#)

**Attachment**

**Vendor Creation- [System Document ID: 3080151]**

CURRENT	HISTORY
Created By	Superuser
Current Status	Commercial Fin Approval
Apollo Legal Entity	Apollo Specialty Hospitals Private Limited
Sub Department	Cardiology
Email	Varun.s@myndsol.com
Contact Number	8700192679
Creation Date	28/09/20 - 15:00:34
Nature of Vendor	Others
Operating Unit	ADCL_Corporate
Vendor Name	Ashish Asthana
Contact Person	Ashish Kumar Asthana
Reason for Onboarding Vendor	Testing

- Approver can view the details of document created in explained manner.

## Approval Screen

Logged In User : Varun Sharma | Role : APPROVER

Approve Reconsider

Superuser (CREATOR) UPLOADED 28 Sep 2020 15:00:34

Sunil Gaur(#USER) Dept SPOC Approval 28 Sep 2020 17:18:11

Yogesh kumar RECONSIDERED 28 Sep 2020 17:19:17

Superuser (CREATOR) UPLOADED 28 Sep 2020 17:20:50

Sunil Gaur(#USER) Dept SPOC Approval 28 Sep 2020 17:26:46

Varun Sharma

Approve

Attachment

Comm Fin Approval Remarks

Credit Period\* 45 days

Credit Limit 0

Vendor Creation- [System Document ID: 3080151]

Created By	Superuser	Creation Date	28/09/20 - 15:00:34
Current Status	Commercial Fin Approval	Nature of Vendor	Others
Apollo Legal Entity	Apollo Specialty Hospitals Private Limited	Operating Unit	ADCL_Corporate
Sub Department	Cardiology	Vendor Name	Ashish Asthana
Email	Varun.s@myndsol.com	Contact Person	Ashish Kumar Asthana
Contact Number	8700192679	Reason for Onboarding Vendor	Testing

- Approver has to click on approve to process the document to next stage or Archive it.
- Credit Period is a mandatory field to approve.

## Reconsider Screen

Logged In User : Varun Sharma | Role : APPROVER

Approve Reconsider

Superuser (CREATOR) UPLOADED 28 Sep 2020 15:00:34

Sunil Gaur(#USER) Dept SPOC Approval 28 Sep 2020 17:18:11

Yogesh kumar RECONSIDERED 28 Sep 2020 17:19:17

Superuser (CREATOR) UPLOADED 28 Sep 2020 17:20:50

Sunil Gaur(#USER) Dept SPOC Approval 28 Sep 2020 17:26:46

Varun Sharma

Reconsider

Attachment

Comm Fin Reconsider Reason\*

Reconsider

Vendor Creation- [System Document ID: 3080151]

Created By	Superuser	Creation Date	28/09/20 - 15:00:34
Current Status	Commercial Fin Approval	Nature of Vendor	Others
Apollo Legal Entity	Apollo Specialty Hospitals Private Limited	Operating Unit	ADCL_Corporate
Sub Department	Cardiology	Vendor Name	Ashish Asthana
Email	Varun.s@myndsol.com	Contact Person	Ashish Kumar Asthana
Contact Number	8700192679	Reason for Onboarding Vendor	Testing

- Approver has to click on reconsider to revert back the document if any changes to be required to be done by the creator.
- Comm Fin Reconsider Reason is a mandatory field to reconsider document.

## Document Approved Message

apollo.myndsas.com says  
Action Completed Successfully

OK

Vendor Creation - [System Document ID: 3139175] Logged In U

Approve Document

Comm Fin Approval Remarks: OK and Approved

Credit Period\*: 30 days

Credit Limit: 100000

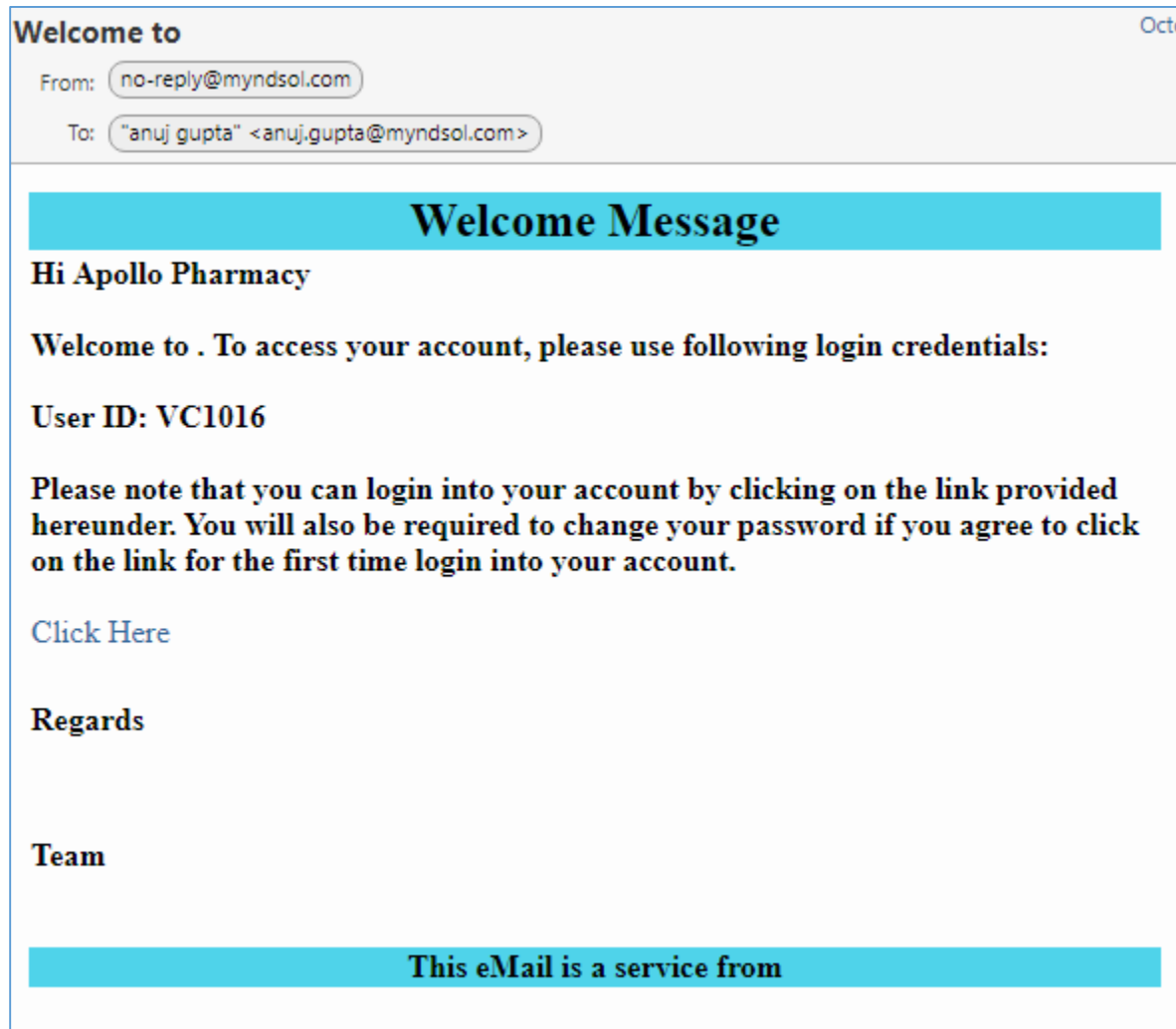
please wait...

Approve

S.No	User Name	STAGE	In Date	Out Date	TAT	Actual TAT	Remarks
1	Requester (CREATOR)	UPLOADED	02 Nov 2020 16:21:18	02 Nov 2020 16:21:18	0	0	Document Created
2	Sunil Gaur(#USER)	Dept SPOC Approval	02 Nov 2020 16:21:18	02 Nov 2020 16:41:54	1	0	
3	Varun Sharma		02 Nov 2020 16:41:54		1		

Approver will get the pop up message on both approver and reconsider action > Click Ok to finish

- Vendor Creation form will be archived as it passed with all approval levels and details can be checked in report section.
- Email notification to vendor will be auto raised by system once Vendor creation is approved at all levels (or archived) and Temporary User ID gets assigned like below.



- Vendor can click in **Click Here** to set password and below screen will appear.
- After successfully resetting the password, Vendor can login to the [link](#) and proceed with Vendor registration details.

A screenshot of a web form titled "Apollo Health and Lifestyle Ltd Password Reset". The form has a header with the company logo and name. Below the header, there is a text box with the instruction: "Setup a new Password or reset the existing one for login. The Password field is case sensitive." The form contains two input fields: "Enter Password [?]" and "Confirm Password [?]", both with placeholder text ".....". To the right of the first input field, it says "5 more characters". Below the input fields is a green "Submit" button. At the bottom of the form, there are two checkboxes: "Password should contain minimum '5' and maximum '10' characters" and "Password Policy is 'NORMAL'".

## 4- Vendor Registration (By Vendor)

User Login details

**Username:** Username as Employee Code or Vendor Code

**Password:** As per password generated by user in PEARL through email notification.

Vendor Home Page

Document Type :

Need To Act (0) My Request (0) History (0) Draft (0)

Export to Excel

Action	SYSTEM ID	SUBJECT	STATUS	CREATED BY	RECEIVED ON	PENDING DAYS
No records available.						

20 items per page No items to display

Vendor Registration Form

- Path: Document > Vendor Registration

Vendor Registration

Registration Type\* New Vendor

Nature of Vendor Others

Vendor Name Apollo Pharmacy

City New delhi

Telephone 1\*

Email\* anuj.gupta@myndsol.com

Contact Person Mobile 8102000010

Secondary Contact Person Designation\* Sub Head

Supplier Type\* Trader

GST Status\* Unregistered

GST City

GST PIN Code

GST Fax Number

Bank Account\* 5600015001515

Branch Name\* Noida

Request ID\* VC1016

Supplier ID\* SI\_1010

Credit Period 30 days

Apollo Legal Entity\* AHLL Diagnostics Limited

Registered Address Udhog Vihar

State Delhi

Telephone 2

Operating Unit AHLL\_Corporate

Contact Person Email anuj.gupta@myndsol.com

PAN Number\* GHBGH7890H

Organization Type\* Proprietorship

GST Num

GST State

GST Telephone 1

GST Email\* anuj.gupta@myndsol.com

Account Holder Name Apollo Pharmacy

Bank1 Address1\* sector 62, Noida

Bank1 City\*

Bank1 State\*

New Site Code\* VR1010

Credit Limit 100000

Sub Department\* Cardiology

PIN Code\* 110047

Country India

Fax Number

Contact Person Name Vishal Agarwal

Primary Contact Person Designation\* Sales Head

PAN Copy\* Choose File Decl...pdf 637388943809009299\_...pdf

Organization Regn Certificate Choose File No f...osen

GST Certificate Choose File No f...osen

GST Country

GST Telephone 2

Bank Key (IFSC Code)\* HDFC0000123

Bank Name\* HDFC Bank LTD

Bank1 Address2\* sector 62, Noida

Bank1 State\*

- Vendor has to fill up the basic details for registration along with the few document attachment requirements.
- \* Marked fields are mandatory and other fields are non-mandatory.
- Grey colored fields are non-editable at user end.



- Different Validations are present to avoid mistakes at user level and will prompt on save button.

## Vendor Registration form Submission

The screenshot shows the Apollo Health and Lifestyle Ltd Vendor Registration form. The form is titled 'Vendor Registration' and contains various fields for registration details. A confirmation message is displayed in the center: 'Confirmation System DOC ID is 3108843 New Site Code is VR1011'. The message has a 'Close' button.

- Vendor will get above message once he/she has submitted the registration form using save button.
- Vendor Registration document will go for required approval (like next steps) as per DOA defined in pearl.

## Vendor Registration Doc Detail Page

The screenshot shows the Apollo Health and Lifestyle Ltd Vendor Registration Doc Detail Page. The page displays a table with the following columns: Action, SYSTEM ID, SUBJECT, STATUS, CREATED BY, RECEIVED ON, and PENDING DAYS. The table contains one row with the following data: Action: View Details, SYSTEM ID: 3108843, SUBJECT: Vendor Registration, STATUS: AP Desk Validation, CREATED BY: Apollo Pharmacy, RECEIVED ON: 21/10/2020, PENDING DAYS: 0. The 'My Request (1)' tab is highlighted.

Action	SYSTEM ID	SUBJECT	STATUS	CREATED BY	RECEIVED ON	PENDING DAYS
<a href="#">View Details</a>	3108843	Vendor Registration	AP Desk Validation	Apollo Pharmacy	21/10/2020	0

- Vendor can view details of his/her submitted request from home page by clicking view details as highlighted above under my request tab.
- After successfully submitting the vendor registration request, next approver will get email notification like below.

## Email Notification

**Vendor Registration for Approval!**

From: [no-reply@myndsol.com](mailto:no-reply@myndsol.com)

To: "sunil pareek" <[sunil.pareek@myndsol.com](mailto:sunil.pareek@myndsol.com)>

**Dear AP Desk,**

This is to inform you that New Vendor Registration Request is submitted by Vendor on Portal and due for your Action -

Summary of Request is given below -

Vendor Name	: Apollo Pharmacy
Contact Person Name	: Vishal Agarwal
Contact Person mobile no.	: 8102000010
Contact Person E-mail id	: <a href="mailto:anuj.gupta@myndsol.com">anuj.gupta@myndsol.com</a>
PAN Number	: GHBGH7890H
GST Num.	:
Address	: Udhayog Vihar
City	: New delhi
State	: Delhi
Country	: India
Bank Key (IFSC Code)	: HDFC0000123
Bank Account No.	: 5600015001515
Account Holder Name	: Apollo Pharmacy
MSME Registration Type	: None
Bank Account No.	: 5600015001515
GST State	:
Organization Type	: Proprietorship

Please Approve/Reject Request within SLA Period

[Click Here](#) to Login on Pearl Portal using your User ID and Password

Regards

**Procurement Team**

- AP Desk user will get the email notification for his/her action.

## 5- Vendor Registration Approvals

### 1-AP Desk

#### User Login Details

**Username:** Username as Employee Code or Vendor Code

**Password:** As per password generated by user in PEARL through email notification.

## AP Desk Home Page

Document Type : **Vendor Registration**

**Need To Act (4)** | My Request (0) | History (5) | Draft (0)

Export to Excel

Action	SYSTEM ID	SUBJECT	STATUS	CREATED BY	RECEIVED ON	PENDING DAYS
<a href="#">View Details</a>	3108843	Vendor Registration	AP Desk Validation	Apollo Pharmacy	21/10/2020	0
<a href="#">View Details</a>	3098828	Vendor Registration	Integration Update	Superuser	14/10/2020	7
<a href="#">View Details</a>	3094989	Vendor Registration	AP Desk Validation	Superuser	12/10/2020	9
<a href="#">View Details</a>	3082678	Vendor Registration	AP Desk Validation	Anuj Gupta_30092020	30/09/2020	21

20 items per page | 1 - 4 of 4 items

- AP Desk can login by using his/her credentials and can see next action in **“Need to Act”** and see Doc details by clicking view details and take necessary actions as below.

## AP Desk Approver Screen

Welcome to eDMS Control Panel | Welcome to eDMS Control Panel | Doc Detail Page

apollo.myndsas.com/NewDocDetail.aspx?DOCID=3094989

Logged In User : AP Desk | Role : AP DESK

**Approve** | **Reconsider**

Superuser (CREATOR)  
UPLOADED  
12 Oct 2020 09:51:12

AP Desk  
Integration Update

**Approve**

Vendor Site Code\* VR1007

Vendor Code

TDS Applicable\* Select

SECTION CODE

ACCTS PAY CODE\* 31.70135.2015040.999.0000.00000

AP Desk Approval Remarks

SIC

SECTION TYPE\* Select

TAX RATE

PREPAY CODE\* 31.70135.1060101.999.0000.00000

**Attachment**

Your company name  
123 Your Street  
City, State, Country  
ZIP Code

994-555-1234  
your@email.com  
yourwebsite.com

BILLED TO  
Client Name  
Street address  
City, State, Country  
ZIP Code

**Invoice**

Description	Unit Price	Quantity	Amount
Unlabeled account	\$0	1	\$0
Your Item Name	\$0	1	\$0
Your Item Name	\$0	1	\$0
Your Item Name	\$0	1	\$0
Your Item Name	\$0	1	\$0
Your Item Name	\$0	1	\$0
Your Item Name	\$0	1	\$0
Your Item Name	\$0	1	\$0
SUBTOTAL	\$0		\$0
DISCOUNT	\$0		\$0
ITEM TAXES	0%		\$0
TAX	\$0		\$0
<b>INVOICE TOTAL</b>			<b>\$2,000</b>

TERMS  
E.g. Please pay invoice by 10/01/2020

**Vendor Registration- [System Document ID: 3094989]**

CURRENT		HISTORY	
Created By	Superuser	Creation Date	12/10/20 - 09:51:11
Current Status	AP Desk Validation	Submitter Name	
Submitter Role		Registration Type	New Vendor
Request ID	VC1007	New Site Code	VR1007
Vendor Selection		Supplier ID	

- AP Desk user will fill required details and approve the document.
- Without filling information in mandatory fields, document can not be approved.
- Once Approved Popup message will appear > Click ok and proceed.

## Reconsider Screen

Logged In User : AP Desk | Role : AP DESK

Superuser (CREATOR)  
UPLOADED  
12 Oct 2020 09:51:12

AP Desk  
Integration Update

**Reconsider**

AP Desk Reconsider Reason\*

**Attachment**

Your company name  
123 Your Street  
City, State, Country  
ZIP Code

555-555-1234  
your@email.com  
yourwebsite.com

BILLED TO  
Client Name  
Street address  
City, State, Country  
ZIP Code

**Invoice**

DESCRIPTION	UNIT COST	QTY/HR RATE	AMT
INVOICE NUMBER 00001			
DATE OF ISSUE 0000000000			
Your Item name	\$0	1	\$0
Your Item name	\$0	1	\$0
Your Item name	\$0	1	\$0
Your Item name	\$0	1	\$0
Your Item name	\$0	1	\$0
Your Item name	\$0	1	\$0
Your Item name	\$0	1	\$0
SUBTOTAL	\$0		\$0
TAXES	\$0		\$0
TAX RATE	0%		0%

**Vendor Registration- [System Document ID: 3094989]**

CURRENT	HISTORY
Created By	Superuser
Creation Date	12/10/20 - 09:51:11
Current Status	AP Desk Validation
Submitter Name	
Registration Type	New Vendor
Request ID	VC1007
New Site Code	VR1007
Vendor Selection	
Supplier ID	
Existing Vendor Code	
Existing Site Code	
Credit Period	45 days
Credit Limit	100000
Nature of Vendor	Others

AP Desk  
Integration Update

- Reconsider Reason is mandatory otherwise document cannot be reconsidered.
- 

## 6- Vendor Amendment

User Login details

**Username:** Username as Employee Code or Vendor Code

**Password:** As per password generated by user in PEARL through email notification.

**Path:** Documents > Vendor Amendment

Welcome , Requester Your Role REQUEST...

**Vendor Amendment**

Vendor Name*	Apollo Pharmacy-VR1011	Vendor Code*	Ven_21102020
Vendor Site Code*	VR1011	Operating Unit	AHLL_Corporate
PAN Number*	GHBGH7890H	Nature of Vendor	Others
Apollo Legal Entity*	AHLL Diagnostics Limited	Vendor Name	
Credit Period	45 days	Credit Period	Select
Credit Limit	100000	Credit Limit	
Registered Address	Shastri Nagar	Registered Address	
PIN Code*	110047	PIN Code	Select
City	Lucknow	City	
State	Delhi	State	
Country	India	Country	
Telephone 1	011-51515454	Telephone 1	
Telephone 2		Telephone 2	
Fax Number		Fax Number	
Email	anuj.gupta@myndsol.com	Email	
Contact Person Name	Vishal Agarwal	Contact Person Name	
Contact Person Mobile	8102000010	Contact Person Mobile	
Contact Person Email	anuj.gupta@myndsol.com	Contact Person Email	
GST Status*	Unregistered	GST Status	Select

- 2 Sides are available Left and Right, Left is data coming from Vendor Master and Right is to update the new information.
- Vendor Name is a mandatory field to retrieve information of vendor from vendor master.
- Grey colored fields are non-editable at Right Side and nothing can be changed at Left side.

## Vendor Amendment form Submission

- User will get above message once he/she has submitted the amendment form using save button.
- Vendor Amendment document will go for required approval (like next steps) as per DOA defined in pearl.

## Vendor Amendment Doc Detail Page

Action	SYSTEM ID	SUBJECT	STATUS	CREATED BY	RECEIVED ON	PENDING DAYS
<a href="#">View Details</a>	3139369	Vendor Amendment	AP Desk Validation	Requester	02/11/2020	0

- User can view details of his/her submitted request from home page by clicking view details as highlighted above under my request tab.

## 7- Vendor Amendment Approvals

### 1-AP Desk

## User Login Details

**Username:** Username as Employee Code or Vendor Code

**Password:** As per password generated by user in PEARL through email notification.

## AP Desk Home Page

Action	SYSTEM ID	SUBJECT	STATUS	CREATED BY	RECEIVED ON	PENDING DAYS
<a href="#">View Details</a>	3139369	Vendor Amendment	AP Desk Validation	Requester	02/11/2020	0
<a href="#">View Details</a>	3138553	Vendor Amendment	AP Desk Validation	Superuser	02/11/2020	0
<a href="#">View Details</a>	3133792	Vendor Amendment	AP Desk Validation	Superuser	29/10/2020	4
<a href="#">View Details</a>	3133791	Vendor Amendment	AP Desk Validation	Superuser	29/10/2020	4
<a href="#">View Details</a>	3133786	Vendor Amendment	AP Desk Validation	Superuser	29/10/2020	4

- AP Desk can login by using his/her credentials and can see next action in “Need to Act” and see Doc details by clicking view details and take necessary actions as below.

## AP Desk Approver Screen

Vendor Amendment- [System Document ID: 3139369]			
Created By	Requester	Creation Date	02/11/20 - 17:02:09
Current Status	AP Desk Validation	Nature of Vendor	Others
Vendor Site Code	VR1011	AP Desk Approval Remarks	

- AP Desk fill required details and approve the document.
- Without filling information in mandatory fields(\*), document can not be approved.
- On approve button, Popup message will appear > Click ok and proceed.
- Document gets archived on successfully approved.

## Reconsider Screen

Reconsider

AP Desk Reconsider Reason\*

Attachment

CURRENT	HISTORY	Vendor Amendment- [System Document ID: 3139369]	
Created By	Requester	Creation Date	02/11/20 - 17:02:09
Current Status	AP Desk Validation	Nature of Vendor	Others
Vendor Site Code	VR1011	AP Desk Approval Remarks	
SIC		TDS Applicable	
SECTION TYPE		SECTION CODE	
TAX RATE		ACCTS PAY CODE	
PREPAY CODE		AP Desk Reconsider Reason	
Integration Update Flag		Apollo Legal Entity	AHLL Diagnostics Limited

- Reconsider Reason is mandatory otherwise document cannot be reconsidered.
- On Clicking of reconsider, Popup message will appear > Click ok and proceed.

## 8- Vendor Blocking

This functionality helps to restrict vendor to access portal and for this required have to login with his/her credentials and can use vendor blocking function like below.

**Path:** Documents > Vendor Blocking

Vendor Blocking

Vendor Selection\* AGGARWAL ENTERPRISES-AP0019

Vendor Name Aggarwal Enterprises

Vendor Site Code AP0019

Vendor Code 10020

Block Type\* Hold

Effective Date\* 02/11/20

Reason for Blocking\* For Verification

Save

- \* Marked fields are mandatory and other fields are non-mandatory.

- Grey colored fields are non-editable at user end.
- Block Type is important to Block and there are 2 options Hold and Full Block to choose one.
- Once saved by user, will go for approval.

## 9- Vendor Blocking Approvals

### 1-AP Desk

#### User Login Details

**Username:** Username as Employee Code or Vendor Code

**Password:** As per password generated by user in PEARL through email notification.

#### AP Desk Home Page

Open Doc detail page to check more details by clicking on view details as highlighted below

The screenshot displays the Apollo Health and Lifestyle Ltd AP Desk interface. The top navigation bar includes 'HOME', 'REPORTS', and 'DOCUMENT' tabs. The user is logged in as 'AP DESK'. The main section is titled 'Document Type : Vendor Blocking'. Below this, there are tabs for 'Need To Act (2)', 'My Request (0)', 'History (2)', and 'Draft (0)'. The 'Need To Act (2)' tab is active, showing a table of pending actions. The table has columns for Action, SYSTEM ID, SUBJECT, STATUS, CREATED BY, RECEIVED ON, and PENDING DAYS. Two items are listed: one with SYSTEM ID 3139382 and another with 3090234. Both are for 'Vendor Blocking' and 'AP Head Validation'. The first item was created by 'Requester' on 02/11/2020 and has 0 pending days. The second item was created by 'Superuser' on 07/10/2020 and has 26 pending days. A 'View Details' button is highlighted for the first item. At the bottom, there is a pagination bar showing '20 items per page' and '1 - 2 of 2 items'.

Action	SYSTEM ID	SUBJECT	STATUS	CREATED BY	RECEIVED ON	PENDING DAYS
<a href="#">View Details</a>	3139382	Vendor Blocking	AP Head Validation	Requester	02/11/2020	0
<a href="#">View Details</a>	3090234	Vendor Blocking	AP Head Validation	Superuser	07/10/2020	26



## AP Desk Doc Detail Page to Approve/Reconsider

Welcome to eDMS Control Panel x Welcome to eDMS Control Panel x Doc Detail Page x Doc Detail Page x +

apollo.myndsas.com/NewDocDetail.aspx?DOCID=3139382

**Apollo Health and Lifestyle Ltd** Logged In User : AP Desk | Role : AP DESK Approve Reconsider

Requester (CREATOR) AP Desk  
UPLOADED  
02 Nov 2020 17:08:50

**Approve**

AP Head Approval Remarks

Attachment

**Vendor Blocking- [System Document ID: 3139382]**

Created By	Requester	Creation Date	02/11/20 - 17:08:50
Current Status	AP Head Validation	Vendor Selection	AGGARWAL ENTERPRISES-AP0019
Vendor Name	Aggarwal Enterprises	Vendor Site Code	AP0019
Vendor Code	10020	Block Type	Hold
Effective Date	02/11/20	Reason for Blocking	For Verification
AP Head Approval Remarks		AP Head Reconsider Reason	
Submitter Cancellation Remarks		Submitter Resubmit Remarks	

Type here to search

## Reconsider Screen

Welcome to eDMS Control Panel x Welcome to eDMS Control Panel x Doc Detail Page x Doc Detail Page x +

apollo.myndsas.com/NewDocDetail.aspx?DOCID=3139382

**Apollo Health and Lifestyle Ltd** Logged In User : AP Desk | Role : AP DESK Approve Reconsider

Requester (CREATOR) AP Desk  
UPLOADED  
02 Nov 2020 17:08:50

**Reconsider**

AP Head Reconsider Reason\*

Attachment

**Vendor Blocking- [System Document ID: 3139382]**

Created By	Requester	Creation Date	02/11/20 - 17:08:50
Current Status	AP Head Validation	Vendor Selection	AGGARWAL ENTERPRISES-AP0019
Vendor Name	Aggarwal Enterprises	Vendor Site Code	AP0019
Vendor Code	10020	Block Type	Hold
Effective Date	02/11/20	Reason for Blocking	For Verification
AP Head Approval Remarks		AP Head Reconsider Reason	
Submitter Cancellation Remarks		Submitter Resubmit Remarks	

**Movement Detail**

Type here to search

- AP Head Approval Remarks is mandatory, Document can't be reconsidered.

## Approve Screen

Apollo Health and Lifestyle Ltd. Logged In User : AP Desk | Role : AP DESK

Requester (CREATOR)  
UPLOADED  
02 Nov 2020 17:08:50

AP Desk

Approve Reconsider

Approve

CURRENT	HISTORY	Vendor Blocking- [System Document ID: 3139382]	
Created By	Requester	Creation Date	02/11/20 - 17:08:50
Current Status	AP Head Validation	Vendor Selection	AGGARWAL ENTERPRISES-AP0019
Vendor Name	Aggarwal Enterprises	Vendor Site Code	AP0019
Vendor Code	10020	Block Type	Hold
Effective Date	02/11/20	Reason for Blocking	For Verification
AP Head Approval Remarks		AP Head Reconsider Reason	
Submitter Cancellation Remarks		Submitter Resubmit Remarks	

- AP Head Approval Remarks is non mandatory

Approve Document

This site says...  
Action Completed Successfully

OK

- Approver will get the pop up message on approve or reconsider action > Click Ok to finish.
- Document will get archived and status will be changed to Blocked.

## 10- Search Report

Search report functions helps user to see detailed information of any available form like Vendor Registration, Vendor Amendment, Vendor Creation etc. and its current status.

**Path:** Report > Search

## Document Search Report Form

Document Search Report

Document Type: Vendor Registration Action: Creation Date

From Date: 2020-10-01 To Date: 2020-10-29

[Click to download in excel](#)

- Document Type field is Select your respective to check details.
- Action Field helps to filter out records and this field has different form fields available in drop down to select.
- Globe Search button is to search record after filling all information and a list of available Documents will be visible like below.
- Information can be downloaded as well by using Click to download in excel

Document Search Report

Document Type: Vendor Registration Action: Creation Date

From Date: 2020-10-01 To Date: 2020-10-29

[Click to download in excel](#)

[Export to Excel](#)

Drag a column header and drop it here to group by that column

DocID	Submitter Name	Submitter Role	New Site Code	Supplier ID	Existing Vendor C...	Existing Site Code	Credit Limit	Vendor Name
3133674			VR1013	SI_1012				Rahul Maheshwari
3109504			VR1012	SI_1011			100000	Kumar sanga
3108843			VR1011	SI_1010			100000	Apollo Pharmacy
3105093			VR1010	Test_20102020			100000	Jayant Sharma
3098828			VR1009				250000	Vipin Traders Ltd.
3096712			VR1008				500000	Tarun Traders Ltd.
3094989			VR1007				100000	Anuj gupta_03

- Click on any of the line to see details and a new window gets opened automatically where you can see detailed information.
- User Can export the data in excel through options as Export to Excel.

\*\*\*\*\* End of Document \*\*\*\*\*