

January 13, 2023

# Vroozzi January 2023

## Release Notes

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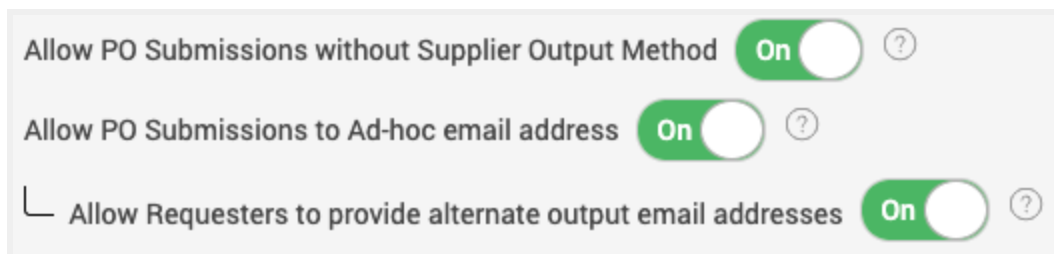
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# Vrooz Purchase (Admin)

## **PO OUTPUT WHEN THE SUPPLIER OUTPUT METHOD IS MISSING OR THE EMAIL NEEDS TO BE CHANGED**

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When the PO Output method is missing in the Supplier master record or if an email is missing or needs to be changed, an Admin can configure how the PO can be processed. New options are now available under Documents => Settings => Purchase Orders.



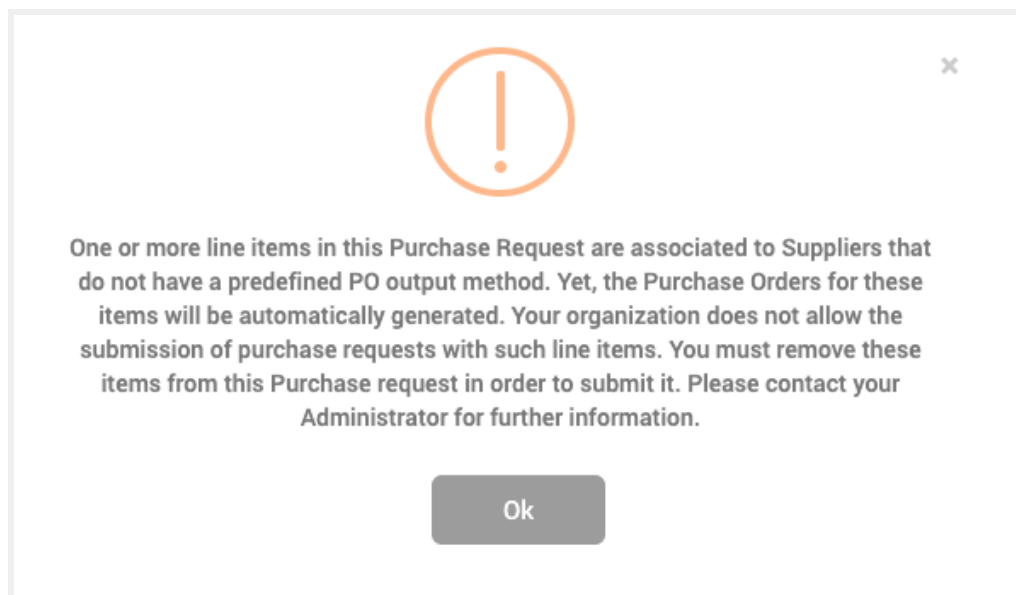
Allow PO Submissions without Supplier Output Method ☒ ?

Allow PO Submissions to Ad-hoc email address ☒ ?

└ Allow Requesters to provide alternate output email addresses ☒ ?

### **ALLOW PO SUBMISSIONS WITHOUT SUPPLIER OUTPUT METHOD**


With the configuration toggle off, users will not be able to “submit” a Purchase Order when the output method is missing in the supplier master record. Requesters will not be able to create Purchase Requests to suppliers without an Output Method defined.



If a Buyer creates a PO and the Output Method is missing on the supplier master record a PO will be created in Draft status. The Buyer will not be able to submit the PO.

With the configuration toggle on, users will be able to “submit” an order when the output method is missing on the supplier master record.

- Requesters will be able to create Purchase Requests. The system will create a PO in “Ordered” status and the PO will be sent to the Buyer via email with a PO pdf attachment (ie: does not go to the vendor because there is no output method assigned).



Shay Ilahi created Purchase Order **2000000197** for Staples. But this Order has not been communicated to the Supplier.


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<b>12/21/2022</b>	<b>1</b>	<b>\$55.00</b>
REQUESTED DELIVERY	ITEMS	TOTAL

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<b>Company :</b> Acme Industries	<b>Requester Name :</b> Shay Ilahi
<b>Issue Date :</b> 12/21/2022	<b>Requester Phone :</b> N/A
<b>Order Type :</b> standard	<b>Requester Email :</b> <a href="mailto:shay.ilahi@vroozi.com">shay.ilahi@vroozi.com</a>
<b>Version :</b> 1	

- Users will also be able to change the status of a Purchase Order from DRAFT to ORDERED without the system sending the PO (ie: does not go to the vendor because there is no output method assigned)


Draft

### Edit Purchase Order 2000000223

ORDER NUMBER: 2000000223  
CREATION DATE: 12/22/2022  
BUYER: Naufli Buyer

BUYER CONTACT: naufli.aziz@vrooz.com

PURCHASING ORGANIZATION: 100 - Vrooz

PURCHASING GROUP: Demo Buyer Group - Demo Buyer Group

ORDER NAME: New Laptop

ORDER TYPE: Standard

COMPANY CODE: 1000 - Vrooz

PAYMENT TERMS: Net 30 Days

FOR TERMS:

LAST INFO:

**Company Information**

SHIPPING ADDRESS: ☐

Vrooz  
Attention: Naufli Buyer  
Vrooz  
1212 Broadway Plaza, STE 2100  
Walnut Creek, CA 94596 US  
naufli.aziz@vrooz.com  
+1 (818) 631-6259

**Supplier Information**

SUPPLIER NAME: CDW111 - CDW  
SUPPLIER ADDRESS: 120 S Riverside Plaza  
Chicago, IL 60605  
supplier@vrooz.com  
+1 (818) 554-8977

SUPPLIER EMAIL: supplier@vrooz.com  
VENDOR ID: CDW111

SHIPPING INSTRUCTIONS:

INVOICE COMMENTS:

**Company Address**

Vrooz Test  
15000 Ventura Blvd  
Sherman Oaks, CA 91403 US

**Line Item Overview**

#	Description	Supplier	Part No.	Category	Delivery Date	Qty	Unit	Unit Price	Total
1	Laptop	CDW		43000000	12/22/2022	1	EA	\$1,500.00	\$1,500.00

Add Item
Apply to All

SUBTOTAL (USD) \$1,500.00

SHIPPING CHARGES (USD) \$0.00

TAX (USD) \$0.00

**TOTAL (USD) \$1,500.00**

TERMS & CONDITIONS

This Agreement, including all exhibits and addenda hereto and all Order Forms, constitutes the entire agreement between the parties and supersedes all prior and contemporaneous agreements, proposals or representations, written or oral, concerning its subject matter. No modification, amendment, or waiver of any provision of this Agreement shall be effective unless in writing and either signed or accepted electronically by the party against whom the modification, amendment or waiver is to be asserted. However, to the extent of any conflict or inconsistency between the provisions in the body of this Agreement and any exhibit or addendum hereto or any Order Form, the terms of such exhibit, addendum or Order Form shall prevail. Notwithstanding any language to the contrary therein, no terms or conditions stated in Your purchase order or other order documentation (excluding Order Forms) shall be incorporated into or form any part of this Agreement, and all such terms or conditions shall be null and void. -- VROOZI, INC.

Delete
Save

Send PO to a different email address
Submit
...

## ALLOW PO SUBMISSIONS TO AD-HOC EMAIL ADDRESS

With the configuration toggle on, users have the option to add or change the email address for the PO output in the PO. The ad hoc email can be used when 1) the supplier record is missing the Output Method or 2) the supplier record has an Output Method defined, but the email address needs to be changed for the specific order. All subsequent communications with the supplier will use the new ad hoc email address.

## ALLOW REQUESTERS TO PROVIDE ALTERNATE OUTPUT EMAIL ADDRESSES (A SUB OPTION THAT IS DISPLAYED WHEN THE FIRST OPTION IS TOGGLED TO ON)


Requesters, with permission in their user master record, have the option to add or change the email address for the PO output in the Purchase Request.

- ☒ **Employee**
  - ☐ Allow Bulk Line Item Upload
  - ☐ Restrict Coding of PR/PO
  - ☐ Power Shopper
  - ☒ Specify Ad-hoc PO Output

## EMPLOYEE RESTRICTION TO COMPANY AND GL CODES

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Admins can now restrict Employees to Company and GL Codes in the User record. Admins can assign multiple codes to an employee.

**Access** 

**Company Code**  

Select accessible codes ▼

**GL Account**  

Click to select value ▼

Employees will only be able to use their assigned Company and GL Code in Purchase Request (PR) line items.

## DISPLAY NAME CHANGES THE WAY THE SUPPLIER NAME IS DISPLAYED IN VROOZI AND INTERNAL COMMUNICATIONS

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The Supplier Master Record has two fields, Name and Display Name. Admins have the ability to change the Display Name of the Supplier, which changes how the supplier is displayed in the application and internal email communication. All external email communications to the Supplier will display the “Name” field.

BASIC INFO	BUSINESS INFO	CONTRACT INFO	INSURANCE INFO	SUPPLIER PORTAL	CHANGE HISTORY
<b>Name *</b> <input type="text" value="CDW Inc."/>		<b>Vendor Id *</b> <input type="text" value="CDW111"/>			
<b>Display Name</b> <input type="text" value="CDW"/>		<b>External Id</b> <input type="text"/>			
<b>Country *</b> <input type="text" value="United States of America"/>					
<b>Street *</b>					

With the January release into production, empty Display Name fields will be populated with the Name field.

Display Name will be used in all system documents (eg: Purchase Requests, Purchase Orders, Goods Receipts, Invoices, and Memos) where the supplier name is displayed.

<input type="checkbox"/>	#	Description	Supplier
<input type="checkbox"/>	1	Laptop Backpack	CDW

Internal Email notification will use the “Display Name” of the supplier.



Shay Ilahi is asking you to approve

Purchase Request **1000000376**

**Date Submitted**

12/21/2022

**Supplier**

CDW

**Reason for Request**

-

**Notes for Approver**

N/A

**12/28/2022**

REQUESTED DATE

**1**

ITEMS

**\$110.00**

TOTAL

**Budget Overview:**

● Within Budget 0

● At Budget 0

● Over Budget 0

**REJECT**

**APPROVE**



Purchase Request **1000000376**  
is ready for sourcing

**12/28/2022**

REQUESTED DELIVERY

**1**

ITEMS

**\$110.00**

TOTAL

[View Purchase Request](#)

Company: Vroozi Demo System

Issue Date: 12/21/2022

Purchase Request #: 1000000376

Request Name: Shay Ilahi 1000000376

**Supplier:**

CDW

120 S Riverside Plaza

CHICAGO, IL 60606-3913

Email: [supplier@vroozi.com](mailto:supplier@vroozi.com)

Phone: +1 (818) 554-8977

**Requester:**

Shay Ilahi

115 TEAM HENDRICK WAY

CARY, NC 27511-1428

Email: [shay.ilahi@vroozi.com](mailto:shay.ilahi@vroozi.com)

Phone: -

External communications will display the "Name" field from the supplier record.





Hendrick Automotive  
115 TEAM HENDRICK WAY  
CARY, NC 27511-1428 US

P: +1 (919) 439-7749

## PURCHASE ORDER: 2000002495

Version 1  
Date: 12/21/2022  
Issued On: 12/21/2022  
Buyer Name: Jack Jarrett  
Buyer Email: buyer@vroozi.com

FOB Terms: -  
Payment Terms: Net due on 15th day of the month

**CDW Inc.**  
120 S Riverside Plaza  
CHICAGO, IL 60606-3913 US

E: supplier@vroozi.com  
P: +1 (818) 554-8977

**Vendor ID:** CDW111

## GOODS RECEIPT AND RETURNS EMAIL NOTIFICATIONS TO SUPPLIERS

Suppliers can now receive email notification for Goods Receipts and Goods Returns created in Vroozi. This feature is not available by default and can be turned on for the company, per request.

Emails will be sent to the email addresses in the “Output Email” and in the “Send PO Alerts” fields of the supplier record.

### Output Email \*

supplier@vroozi.com

### Send PO Alerts



shay.ilahi@vroozi.com x

Once a PO is received (a Goods Receipt is submitted), an email notification is sent with a pdf attachment.



Acme Industries has received item(s) of the Purchase Order **2000000196**

**"Goods Receipt#"**  
3000000056

**Buyer Name**  
Naufil Buyer

**12/21/2022**  
RECEIVING DATE

**1**  
ITEMS

**\$1,405.99**  
TOTAL

**Product Items:**

*Showing 1 of 1*

DESCRIPTION	ORDERED QUANTITY	RECEIVED QUANTITY	TOTAL PRICE
Dell Latitude 7370 Laptop	1	1	\$1,405.99

**Total Received (USD)**

**\$1,405.99**

**To review the full Goods Receipt, Kindly click on the attached PDF.**



Vroozi Test  
15000 Ventura Blvd  
Sherman Oaks, CA 91403 US

### Goods / Service Receipt: 3000000056

Posting Date: 12/21/2022  
Creation Date: 12/21/2022  
Purchase Order: 2000000196  
Receipt Creator: Shay Ilahi

**CDW Inc.**  
120 S Riverside Plaza  
Chicago, IL 60606 US  
  
E: supplier@vroozi.com  
P: +1 (818) 554-8977  
  
**Vendor ID: CDW111**

Item#	Type	Description	Unit Price	Qty Ordered	Qty Received	Value Ordered	Value Received	Del. Date	Total Price
1	product	Dell Latitude 7370 Laptop	\$1,405.99	1.000	1.000	\$1,405.99	\$1,405.99	12/21/22	\$1,405.99

**Total Amount: \$1,405.99**

## INCLUDE/EXCLUDE TAX AND SHIPPING CHARGES FOR FINANCIAL APPROVALS

Admins can configure if tax and shipping charges should be considered for Financial Review. If excluded, the sub-total amount will be used to determine the Financial Review.

This can be configured on Company => Workflow screen

**Request Approval Workflow**

Financial Workflow Configuration

Select your purchase request approval workflow style ⓘ

Spend Limit Staircase

Select your global Fallback Financial Approver ⓘ

Sam (Approval Limit is \$ ▾)

Enable Out of Office for Approvers ⓘ

Off

Exclude Shipping Charges from Workflow ⓘ

Off

Exclude Tax Amount from Workflow ⓘ

On

Once the toggle is on, Sub-total section of PR will show the label “Total Amount in Financial Review”. The Total amount in Financial Review will be the amount that is checked against the Employee’s Spend Limit and will determine the approver(s) for Financial Approval workflow.

<b>Subtotal (USD)</b>	<b>\$1,000.00</b>
<b>Shipping Charges (USD)</b>	<b>\$0.00</b>
<b>Tax (USD)</b>	<b>\$12.00</b>
<hr/>	
<b>Total (USD)</b>	<b>\$1,012.00</b>
<b>Total Amount in Financial Review (USD) ⓘ</b>	<b>\$1,000.00</b>

## MORE OPTIONS FOR PURCHASE ORDER CHANGE REQUESTS (POCR)

More options have been added to the POCR configuration so you can limit or add more options for what users can change during a PO change process. The configuration is in the Admin panel under Documents => Settings => Purchase Orders.

Based on the toggles, the Buyer, Employee or Central Receiver roles who can perform changes to a PO will be able to make the corresponding changes to the fields in the Purchase Order.

The following toggles are available for Catalog Line Items.

**PO Change Request - Catalog Line Items**

Allow users to make the following changes to Catalog items in the PO:

Remove Items ? <input checked="" type="checkbox"/> On	Edit Items ? <input checked="" type="checkbox"/> On		
Change Item Category ? <input type="checkbox"/> Off	Change Item Description ? <input type="checkbox"/> Off	Change Item Price ? <input checked="" type="checkbox"/> On	Change Delivery Date / Service Period ? <input checked="" type="checkbox"/> On
Change Item Identifier ? <input type="checkbox"/> Off	Change Item SKU Number ? <input type="checkbox"/> Off	Change Accounting Info ? <input checked="" type="checkbox"/> On	Change Shipping Info ? <input checked="" type="checkbox"/> On
Change Tax Info ? <input type="checkbox"/> Off	Change Custom Fields ? <input type="checkbox"/> Off		

The new options are:

- Cancel items has been renamed to Remove items
- Change Item Category
- Change Item Description
- Change Item Identifier
- Change Item SKU Number
- Change Tax Info

The following options are available for Non-Catalog Line Items

**PO Change Request - Non-catalog Line Items**

Allow users to make the following changes to Non-catalog items in the PO:

Add Items ? <input checked="" type="checkbox"/> On	Remove Items ? <input checked="" type="checkbox"/> On	Edit Items ? <input checked="" type="checkbox"/> On	
Change Item Category ? <input type="checkbox"/> Off	Change Item Description ? <input type="checkbox"/> Off	Change Item Price ? <input checked="" type="checkbox"/> On	Change Delivery Date / Service Period ? <input checked="" type="checkbox"/> On
Change Accounting Info ? <input checked="" type="checkbox"/> On	Change Shipping Info ? <input checked="" type="checkbox"/> On	Change Tax Info ? <input type="checkbox"/> Off	Change Custom Fields ? <input type="checkbox"/> Off

The new options are:

- Cancel items has been renamed to Remove items
- Change Item Category
- Change Item Description
- Change Tax Info

## Vroozii Purchase (Requesters, Approvers, Buyers, and Central Receivers)

### **PURCHASE ORDER OUTPUT BY THE BUYER WHEN THE OUTPUT METHOD IS MISSING**

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If Vroozii is configured to “Allow PO Submissions without Supplier Output Method” (See Admin configuration), the system will “submit” Purchase Orders (POs) when the Output Method is missing from the supplier master record.

- Requesters will be able to create Purchase Requests. The system will create a PO in “Ordered” status and the PO will be sent to the Buyer via email with a PO pdf attachment (ie: does not go to the vendor because there is no output method assigned). Buyers can then process orders outside the system (eg: print and send/fax scenarios).

Requesters will be notified that the PO will be created and output to the Buyer..



One or more line items in this Purchase Request are associated to Suppliers that do not have a predefined PO output method. If you proceed with submitting this PR, the auto-generated Purchase Orders for these items will be created, but they will not be communicated to the specified suppliers. Instead, the designated Buyers will be notified of the creation of these POs, via email. Such POs will have to be communicated to the supplier via alternate means. Are you sure you want to proceed with submitting this PR?

Cancel

Submit



Shay Ilahi created Purchase Order **2000000197** for Staples. But this Order has not been communicated to the Supplier.

**12/21/2022**

REQUESTED DELIVERY

**1**

ITEMS

**\$55.00**

TOTAL

**Company** : Acme Industries

**Issue Date** : 12/21/2022

**Order Type** : standard

**Requester Name** : Shay Ilahi

**Requester Phone** : N/A

**Requester Email** :  
[shay.ilahi@vroozi.com](mailto:shay.ilahi@vroozi.com)

**Version** : 1

- The buyer role will also be able to change the status of a Purchase Order from DRAFT to ORDERED without the system sending the PO (ie: does not go to the vendor because there is no output method assigned)

**Edit Purchase Order 2000000223** Draft

ORDER NUMBER: 2000000223    CREATION DATE: 12/22/2022    BUYER CONTACT: naufl.aziz@vroozi.com

ORDER NAME: New Laptop    PAYMENT TERMS: Net 30 Days

ORDER TYPE: Standard    FOR TERMS:    ORDER DATE: 12/22/2022

PURCHASING ORGANIZATION: 100 - Vroozi    COMPANY CODE: 1000 - Vroozi    BUYER: Naufl Buyer

PURCHASING GROUP: Demo Buyer Group - Demo Buyer Group    COMPANY ADDRESS: Vroozi Test, 15000 Ventura Blvd, Sherman Oaks, CA 91403 US

**Company Information**

SHIPPING ADDRESS: Vroozi    ATTENTION: Naufl Buyer    1212 Broadway Plaza, STE 2100, Walnut Creek, CA 94596 US    naufl.aziz@vroozi.com    +1 (818) 631-6259

**Supplier Information**

SUPPLIER NAME: CDW111 - CDW    SUPPLIER EMAIL: supplier@vroozi.com    SHIPPING INSTRUCTIONS:    INVOICE COMMENTS:    SUPPLIER ADDRESS: 120 S Riverside Plaza, Chicago, IL 60605    supplier@vroozi.com    +1 (818) 554-8977    VENDOR ID: CDW111

**Line Item Overview**

#	Description	Supplier	Part No.	Category	Delivery Date	Qty	Unit	Unit Price	Total
1	Laptop	CDW		43000000	12/22/2022	1	EA	\$1,500.00	\$1,500.00

Subtotal: \$1,500.00    Shipping Charges: \$0.00    Tax: \$0.00    Total: \$1,500.00

TERMS & CONDITIONS: This Agreement, including all exhibits and addenda hereto and all Order Forms, constitutes the entire agreement between the parties and supersedes all prior and contemporaneous agreements, proposals or representations, written or oral, concerning its subject matter. No modification, amendment, or waiver of any provision of this Agreement shall be effective unless in writing and either signed or accepted electronically by the party against whom the modification, amendment or waiver is to be asserted. However, to the extent of any conflict or inconsistency between the provisions in the body of this Agreement and any exhibit or addendum hereto or any Order Form, the terms of such exhibit, addendum or Order Form shall prevail. Notwithstanding any language to the contrary therein, no terms or conditions stated in Your purchase order or other order documentation (excluding Order Forms) shall be incorporated into or form any part of this Agreement, and all such terms or conditions shall be null and void. - Vroozi, Inc.


Buttons: Delete, Save, Submit (with tooltip: Send PO to a different email address)

## ADDING AD-HOC EMAIL ADDRESSES FOR PO OUTPUT

If Vroozi is configured to “Allow PO Submissions to Ad-hoc email address” (See Admin configuration), users can specify an alternate, ad hoc email address to send the Purchase Order. The ad hoc email can be used when 1) the supplier record is missing the Output Method or 2) the supplier record has an Output Method defined, but the email address needs to be changed for the specific order. All subsequent communications with the supplier will use the new ad hoc email address.

For a PO in Draft status, the user will be able to provide the email address in the Purchase Order after clicking the submit button on the PO.





**Missing pre-defined output method for this supplier**

The supplier associated to this Purchase Order does not have an output method configured. You can optionally provide an email address, that we can send this PO to, or just save the PO, print it and communicate it to the supplier using an alternative channel. In order to send this Purchase Order to the supplier via email, please provide a valid email address in the field below, and click on the **Send PO to Supplier** button. In order to just save the Purchase Order, click on the **Save Final PO** button.

**Email: \***

Save Final PO

Send PO to Supplier

In the case where there is a PO output method defined in the supplier record, the Buyer will have the option to change the PO recipient email address after clicking the ellipsis button next to Submit.


Send PO to a different email address

Submit

...

If Vroozi is configured to “Allow Requesters to provide alternate output email addresses” and given permission in their user master record (See Admin configuration), the Employee role will have the ability to enter an ad hoc email address in the Purchase Request. The user will be notified that the email address is missing in one or more of

the line items in the Purchase Request. The requester can then provide the email address in the Purchase Request after clicking Submit.



One or more line items in this Purchase Request are associated to Suppliers that do not have a predefined PO output method. Yet, the Purchase Orders for these items will be automatically generated. A predefined output destination is required to be able to send these automatically generated POs to the respective suppliers. In order to proceed with submitting this Purchase Request, you must either remove these items from this PR, or provide an output email address to send these auto-generated Purchase Orders to.

Supplier  
**Staples \***

Email Address:

First1Last

Cancel

Submit

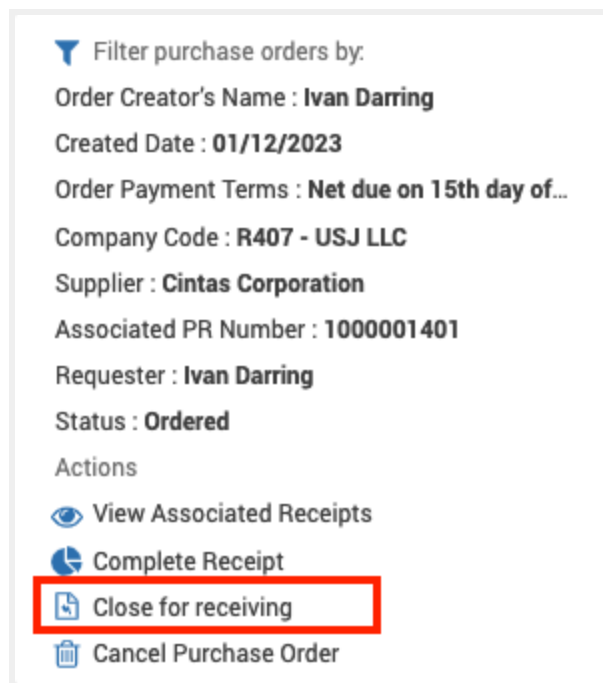
## **PURCHASE ORDER SHORT CLOSE ENHANCEMENTS**

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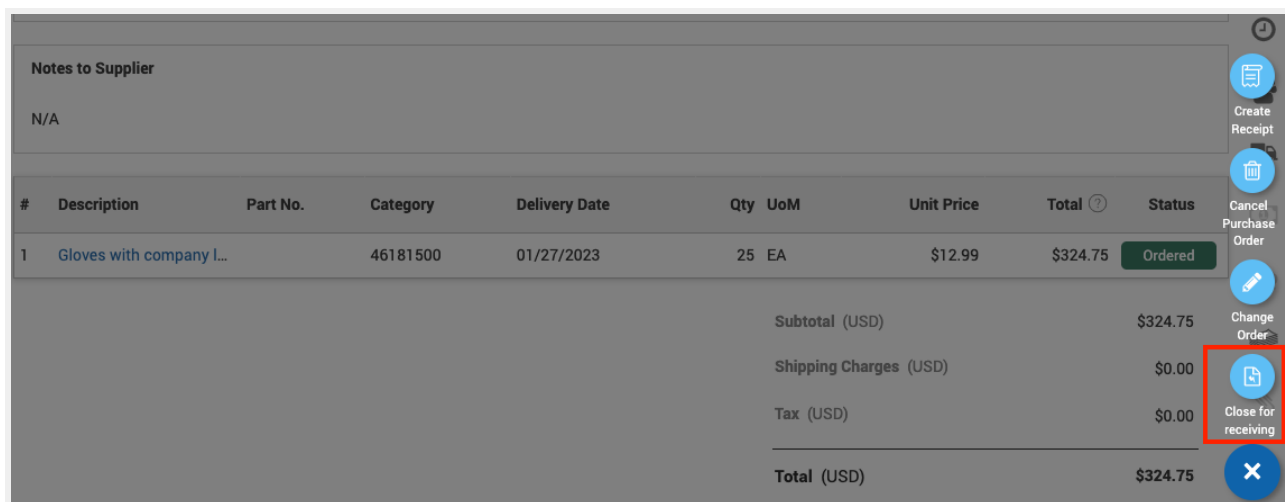
If a partial receipt against a Purchase Order (PO) exists, a user will have the option to short close a PO ("Close for receiving") from the:

- Purchase Order status screen
- Purchase Order document screen
- PO Change Request (POCR) screen

On the Purchase Order Status screen, after clicking the additional options menu (ellipsis or 3-dot menu) on the right, the user will see the option “Close for receiving”.



In the Purchase Order document and after clicking the additional options button (ellipsis or 3-dot button) at the button right, the user will see the option “Close for receiving”



In the PO CR screen, the user will be able to short close a line item or can completely close the PO document.

On clicking the Action menu option in the line item, the user will see the option “Close for receiving”. This will close the line item only.

<input type="checkbox"/>	#	Description	Supplier	Part No.	Category	Delivery Date	Qty	UoM	Unit Price	Total	Status	Action
<input type="checkbox"/>	1	Gloves with c...	Cintas Corporation	46181500		01/27/2023	25	EA	\$12.99	\$324.75	Ordered	...

If the user wants to close the complete PO, the user will see the option “Close for Receiving” after clicking the ellipsis menu option on the Submit button.

Close for Receiving ?

Submit

## Vrooz Integration

### DUPLICATE INVOICE CHECK IN NETSUITE

For NetSuite invoice integrations, Vrooz will check during posting if an invoice with the same supplier and supplier invoice number already exists in Netsuite. If it exists then the system will return an error message instead of posting to Netsuite.

## Resolutions

- Not applicable for this release