

October 11, 2024

Vroozi October 2024 Release Notes

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Vroozi Administration (Admin)

LINE ITEM FIELD CONFIGURATION FOR AP DOCUMENTS (MORE FIELDS)

Admins can set fields such as Cost Center, WBS, Internal Order, Profit Center, GL Account and Plant as optional, required, or hidden for Invoices and Memos. The settings now apply to AP documents line items to ensure fields are handled consistently across all Procure-to-Pay documents.

To enable this feature, please contact support@vroozi.zendesk.com. Once enabled, line item fields in AP documents will adhere to the configured settings.

Line Item Field Configuration					
General Information		Company Information			
Part No.	Required	Optional	Hidden		
Service Part No.	Required	Optional	Hidden		
Price Unit	Required	Optional	Hidden		
Manufacturer Part No.	Required	Optional	Hidden		
Manufacturer Name	Required	Optional	Hidden		
Brand Name	Required	Optional	Hidden		
Quote Number	Required	Optional	Hidden		
Ref Web URL	Required	Optional	Hidden		
Supplier		Accounting			
Catalog Item	Required	Optional	Hidden		
Non-Catalog Item	Required	Optional	Hidden		
Shipping		Purchasing Organization - QA	Required	Optional	Hidden
Shipping Charges	Required	Optional	Hidden		
		Plant - QA	Required	Optional	Hidden
		Cost Center	Required	Optional	Hidden
		WBS Element	Required	Optional	Hidden
		Internal Order	Required	Optional	Hidden
		Profit Center	Required	Optional	Hidden
		GL Account	Required	Optional	Hidden
		Customer - QA	Required	Optional	Hidden
		Class - QA	Required	Optional	Hidden
		Project	Required	Optional	Hidden
		Location - QA	Required	Optional	Hidden

USD - US Dollar

#	Description	Price	Qty	Tax	Total
Please enter your invoice item #1 details below					
General Information			Accounting		
Shipping Address <i>Click to select value</i>					
Type *	Description *	Price *	Quantity *		
Product	Test	\$1.00	1		
Category	Tax Code	Discount	Shipping Charges		
<i>Enter Category</i>	<i>Enter tax code</i>	\$0.00	\$0.00		
Tax	UoM *	Company Code - QA *	Purchasing Organization - QA		
\$0.00	EA - test	C1001 - Sam CC 1001	<i>Enter Purchasing Organization -</i>		
Plant - QA	← Plant - Optional / Required				
<i>Enter Plant - QA</i>					
<p>Vrooz Intelligence has new suggestions for fields <i>Tax Code, Company Code - QA, Plant - QA, GL Account, Customer - QA, Location Type - QA, Location - QA, Class - QA</i></p>					
Previous			Next		

Add Item Apply to All Delete Item(s)

USD - US Dollar

#	Description	Price	Qty	Tax	Total
Please enter your invoice item #1 details below					
General Information			Accounting		
Shipping Address <i>Click to select value</i>					
Type *	Description *	Price *	Quantity *		
Product	Test	\$1.00	1		
Category	Tax Code	Discount	Shipping Charges		
<i>Enter Category</i>	<i>Enter tax code</i>	\$0.00	\$0.00		
Tax	UoM *	Company Code - QA *	Purchasing Organization - QA		
\$0.00	EA - test	C1001 - Sam CC 1001	<i>Enter Purchasing Organization -</i>		
Plant - QA	← Plant Hidden				
<i>Enter Plant - QA</i>					
<p>Vrooz Intelligence has new suggestions for fields <i>Tax Code, Company Code - QA, Plant - QA, GL Account, Customer - QA, Location Type - QA, Location - QA, Class - QA</i></p>					
Previous			Next		

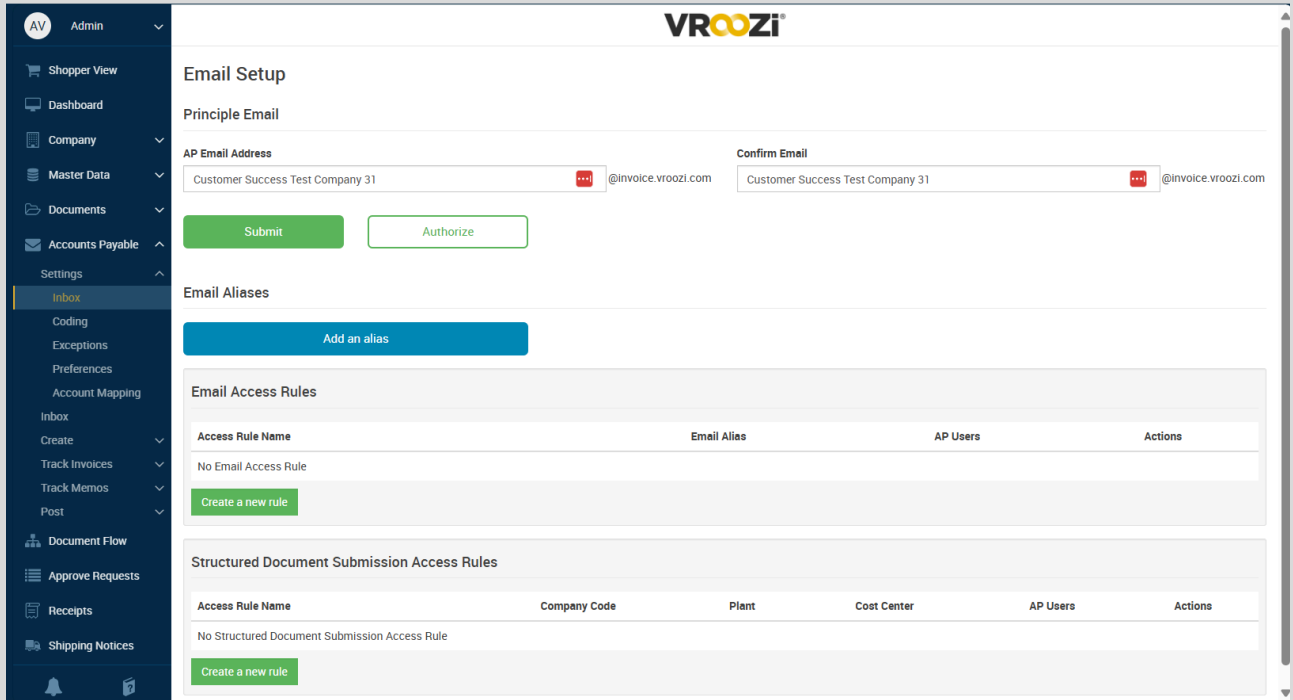
Add Item Apply to All Delete Item(s)

OPTION TO RESTRICT INVOICE INBOX VISIBILITY FOR AP MANAGERS

If enabled, AP Managers will only see AP documents in the Hopper Inbox (“Document Inbox”) or Archive folder based on the Email Access or Structured Document Submission Access Rules. AP Managers will need to be explicitly assigned using the access rules to access AP documents in the inbox. Some companies allow AP Managers to access all documents, but if you want to restrict what the AP Managers can access, then this option will allow the restriction through the access rules.

To enable this feature, please contact support@vroozi.zendesk.com. Once activated, AP Managers will see only the documents associated with their assigned Access Rules.

The Access Rules can be defined in the Admin Panel under Accounts Payable => Settings => Inbox under the sections “Email Access Rules” and “Structured Document Submission Access Rules”.



The screenshot displays the VROOZI Admin Panel interface. The left sidebar contains navigation options such as Admin, Shopper View, Dashboard, Company, Master Data, Documents, Accounts Payable, Settings, and Inbox. The main content area is titled "Email Setup" and includes the following sections:

- Principle Email:** Fields for "AP Email Address" (Customer Success Test Company 31 @invoice.vroozi.com) and "Confirm Email" (Customer Success Test Company 31 @invoice.vroozi.com), with "Submit" and "Authorize" buttons.
- Email Aliases:** A button labeled "Add an alias".
- Email Access Rules:** A table with columns "Access Rule Name", "Email Alias", "AP Users", and "Actions". It shows "No Email Access Rule" and a "Create a new rule" button.
- Structured Document Submission Access Rules:** A table with columns "Access Rule Name", "Company Code", "Plant", "Cost Center", "AP Users", and "Actions". It shows "No Structured Document Submission Access Rule" and a "Create a new rule" button.

Email Access Rules

Access Rule Name *

Access Rule Description *

Email Alias *

AP Users *

JM Jane

Dashboards

AP Manager

Inbox 4 155

Create

Invoice

Memo

Resolve Invoices 7

Track Invoices

Inbox & T

Incoming documents that need processing an

Document Inbox

Archive 0

Sender	Subject	Date
Sujoy Kar <sujoy.kar@vroozi.com>	Email sent to Construction	Today at 09:19 AM ⋮

Vroozi Purchase (Supplier)

MORE PROMINENT PO CANCELLATION STATUS ON THE PO PDF

The canceled status will now be more prominent on a Purchase Order (PO) PDF so that suppliers clearly know that the order is canceled ie: not a new order.

The PO pdf is generated and sent to the supplier after a user performs a Purchase Order Change Request (POCR). When items are canceled in an order, suppliers will now have better visibility into the status of the PO or PO Line items.



The screenshot displays a Vroozi Purchase Order PDF. At the top left is the Vroozi logo. To the right, a prominent red box contains the word "CANCELED" in white capital letters. Below the logo, the Vroozi HQ address and contact information are listed. The purchase order number is 2000001804. The document is divided into sections for Version, Date, Issued On, Buyer Name, Buyer Email, FOB Terms, and Payment Terms. It also includes contact information for MJ Supplies, including their address, phone number, and email. At the bottom, there are sections for "SHIP TO" and "BILLING", both of which show the Vroozi HQ address and contact information.

VROOZI®

Vroozi HQ
15000 VENTURA BLVD
Building: 2
SHERMAN OAKS, CA 91403-2443 US

E: nichole.whitaker@vroozi.com
P: +1 (818) 555-5555

PURCHASE ORDER: 2000001804

Version	1	MJ Supplies
Date:	09/24/2024	600 Atlantic Ave
Issued On:	09/24/2024	Boston, MA 02210 US
Buyer Name:	adab ul Qayyum	E: mike.jud+mjsupsoc@vroozi.com
Buyer Email:	adabul.qayyum+socibuyer@vroozi.com	P: +1 (210) 555-1234
FOB Terms:	-	Vendor ID: 202409231615
Payment Terms:	4.0% Disc 1Day, 2.0% Disc 1Day, Net 1	

SHIP TO
Attention: asma
Vroozi HQ
15000 VENTURA BLVD
Building: 2
SHERMAN OAKS, CA 91403-2443 US

E: nichole.whitaker@vroozi.com
P: +1 (818) 555-5555

BILLING
-
E: -
P: -

Resolutions

- In Vrooz Purchase and Marketplace, users can now add fractional quantities to the shopping cart from Punchout Catalogs items.
- If an item has an Item Model Number defined, the field will now be displayed in the Purchase Request and Shopping Cart item details.
- Users can now customize the line item column display in the Payment Request.
- Vrooz Purchase
 - Removed the GL display restriction (formerly 10 GLs) in the User Profile GL Access field.
 - Fixed searching in the Receipts => Ready to Receive screen. Prior to this release, when the system would reset the documents list to the default state, it didn't recognize the user's new search query until the reset was complete. Now the user can't enter a new value in the search field until the reset operation on the screen is complete.
 - PR and PO Line items will no longer be deleted after updating the supplier master data.
 - Resubmitting a Rejected Change Request after changing item data will update the line item status to 'Change(s)' instead of 'New Addition'.
 - Resolved a freezing issue in "Apply to All" caused by manually adding a % sign in the Split by Percent value. The % value now defaults automatically, eliminating the need for manual entry.
- Catalog change report will capture additional fields after a user updates the item price via Direct Item Update.
- Fixed an issue where the configurable item checkbox functionality did not work properly if existing items are updated via Merge & Update.
- Vrooz Invoice
 - Improved Inbox, Invoice, and Track Invoice user experience on mobile.
 - Users can now successfully select and replace an existing exception percentage.
- Resolved an issue in the line item column selection (Invoice, Memo, and Purchase Request) where the filtering options did not highlight relevant matches and caused the Column Preferences list to reset upon selection.