Vroozi Release Notes: July 6th, 2018

Vroozi Purchase Features & Enhancements

What's New…

1. **Minimum Order Value on PR Line Item Bulk Upload**: For those of you using the current Line Item Bulk Upload within the Purchase Requisition, we have added an additional validation against the Min Order Value per supplier. If your supplier has been setup with a Minimum Order Value, meaning that you must have a minimum dollar value per PO, the system will now check this against each supplier item added to your Requisition via the bulk upload.

   The validation will check against each supplier's configuration, and if the requisition you are building does not meet the minimum value set for any supplier in your bulk upload, the system will then require you to add additional quantity or line items for that specific supplier.

   Remember, not all suppliers will have a required minimum order value, so in most cases, you will not see any validations. Ask your administrator for the suppliers who have a Minimum Order Value.

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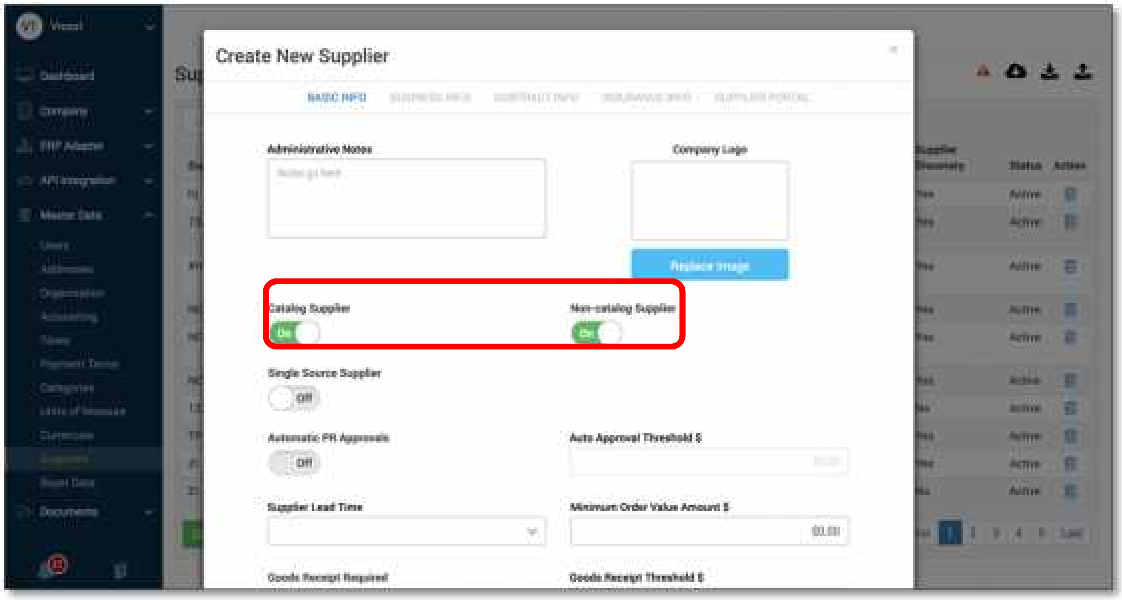
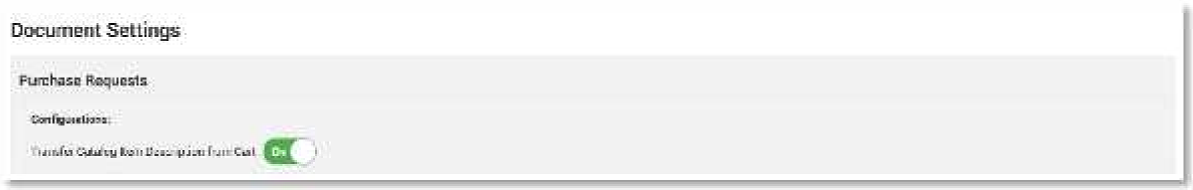
2. **Catalog & Non-Catalog Supplier Flags:** The Catalog and Non-catalog Supplier flags have been introduced into the Vroozi Purchase supplier record. Vroozi Purchase Administrators can now control this supplier classification right within the Vroozi Purchase administration panel, under ***Master Data -> Suppliers -> Supplier Modal -> Basic Info.***

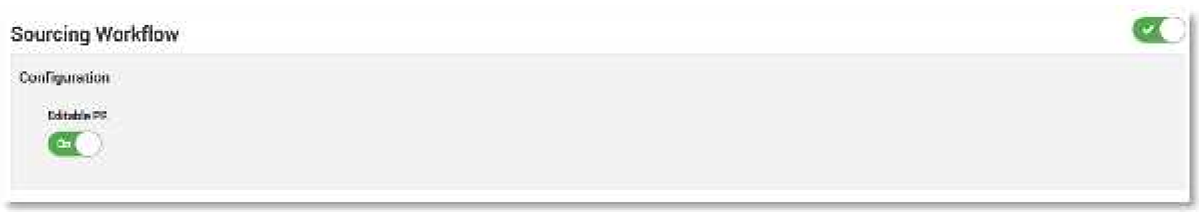


   a. <u>Catalog Supplier:</u> If the '*Catalog Supplier'* flag is turned 'On' for a supplier, the system will only allow Purchase Orders, and Purchase Requests documents to be created from catalog line items. This supplier name will not appear on the 'Recommended Supplier' field when creating a 'Free-Text' line item.
   b. <u>Non-Catalog Supplier:</u> If the 'Non-Catalog Supplier flag is turned 'On' for a supplier, the system will only allow the Purchase Orders, and Purchase Request documents to be created from free-text line items. This supplier will not be available to create a catalog against.
   c. <u>Catalog & Non-Catalog Supplier</u>: if both flags are turned 'On', the supplier will be available for both Catalog & Non-Catalog Purchase Request line items.

3. **Item Long Descriptions for Catalog Items:** Vroozi has introduced a new configuration to prevent the catalog 'Long Item Descriptions' from transferring from the catalog to the PR. This company level configuration applies to all catalog items and can be set up from the document settings screen in the PMAN Admin Panel, under ***Documents -> Settings -> Purchase Requests***.



4. **Sourcing Approvers can edit Supplier Notes on a Purchase Request:** For Purchase Requests under Sourcing Review; a Sourcing Approver can now edit the supplier notes written by the requester, in addition to the Approver Notes.
   a. Editable PR settings**:** The editable PR settings can be setup under **Company → Sourcing Workflow → Configurations.**



   b. Editing a PR in Sourcing Review: The Sourcing Approver can also edit all line item information, pricing, and quantity when the PR is in 'Edit' mode.

General Defect Fixes

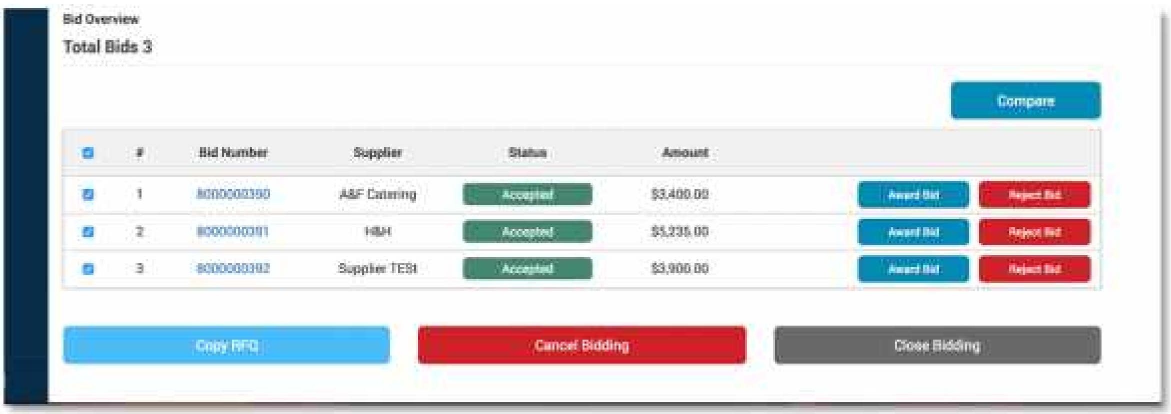
1. Fixed an issue, allowing users to submit a purchase request, while an attachment is being uploaded to a document, or a line item is being copied on requisition. The system will now allow the attachment transaction and/or line item copying to complete, before the 'Submit', 'Saved' or 'Delete' buttons are enabled.

2. Fixed an issue, preventing the formatting on a Vroozi Purchase announcement from being updated and displayed properly. This would occur only when the announcement was edited a second time. All announcement formatting is now persisting, despite any additional editing done to the announcement.

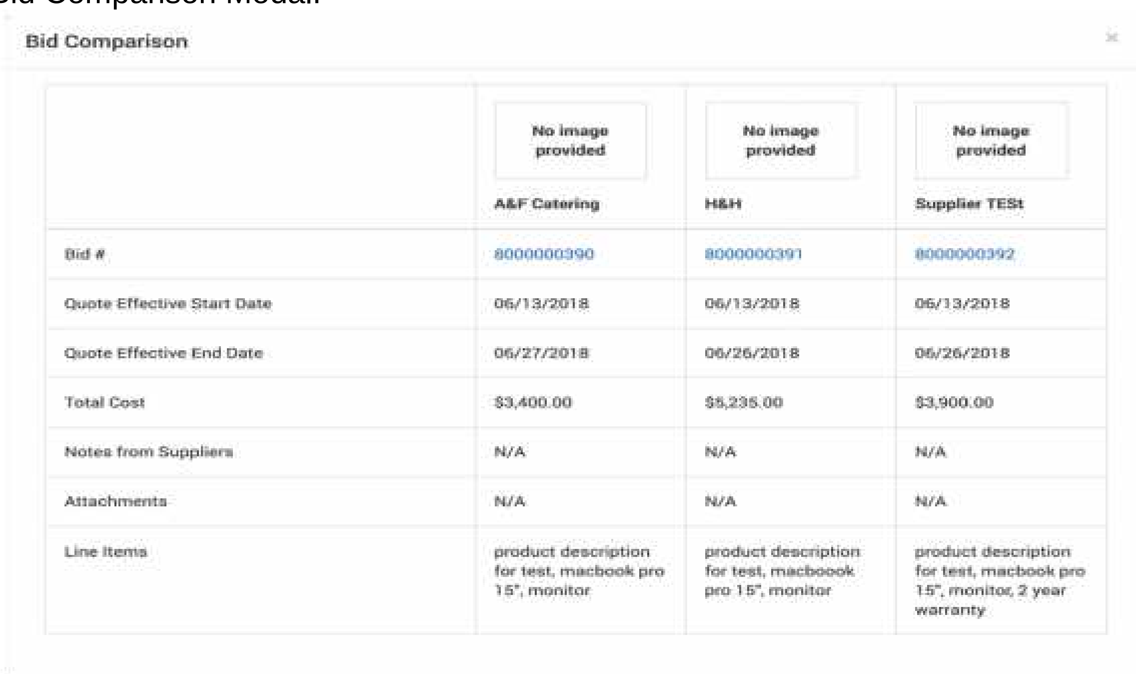
Vroozi Sourcing Features

What's New…

1. **QRFx Bid Comparison:** Users can now compare incoming bids from suppliers. Users can select the bids they want to compare; when the user clicks on the 'Compare' button a pop-up window will appear to display the bids side by side displaying the details for each bid. This will help user's determent which bid to award/reject and equip them to make the best sourcing decision for their business needs.



Bid Comparison Modal:



	No image provided A&F Catering	No image provided H&H	No image provided Supplier TESt
Bid #	8000000390	8000000391	8000000392
Quote Effective Start Date	06/13/2018	06/13/2018	06/13/2018
Quote Effective End Date	06/27/2018	06/26/2018	06/26/2018
Total Cost	$3,400.00	$5,235.00	$3,900.00
Notes from Suppliers	N/A	N/A	N/A
Attachments	N/A	N/A	N/A
Line Items	product description for test, macbook pro 15", monitor	product description for test, macboook pro 15", monitor	product description for test, macbook pro 15", monitor, 2 year warranty

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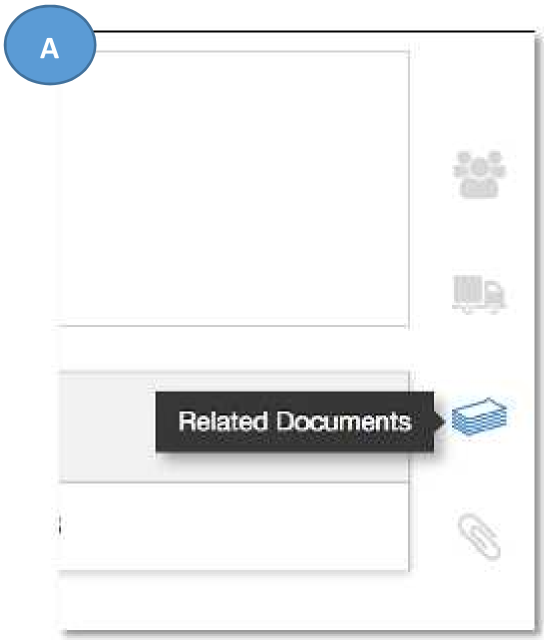
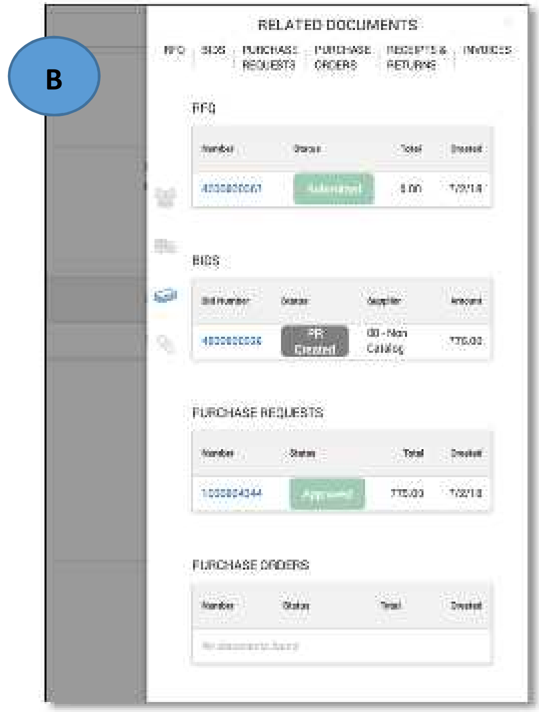
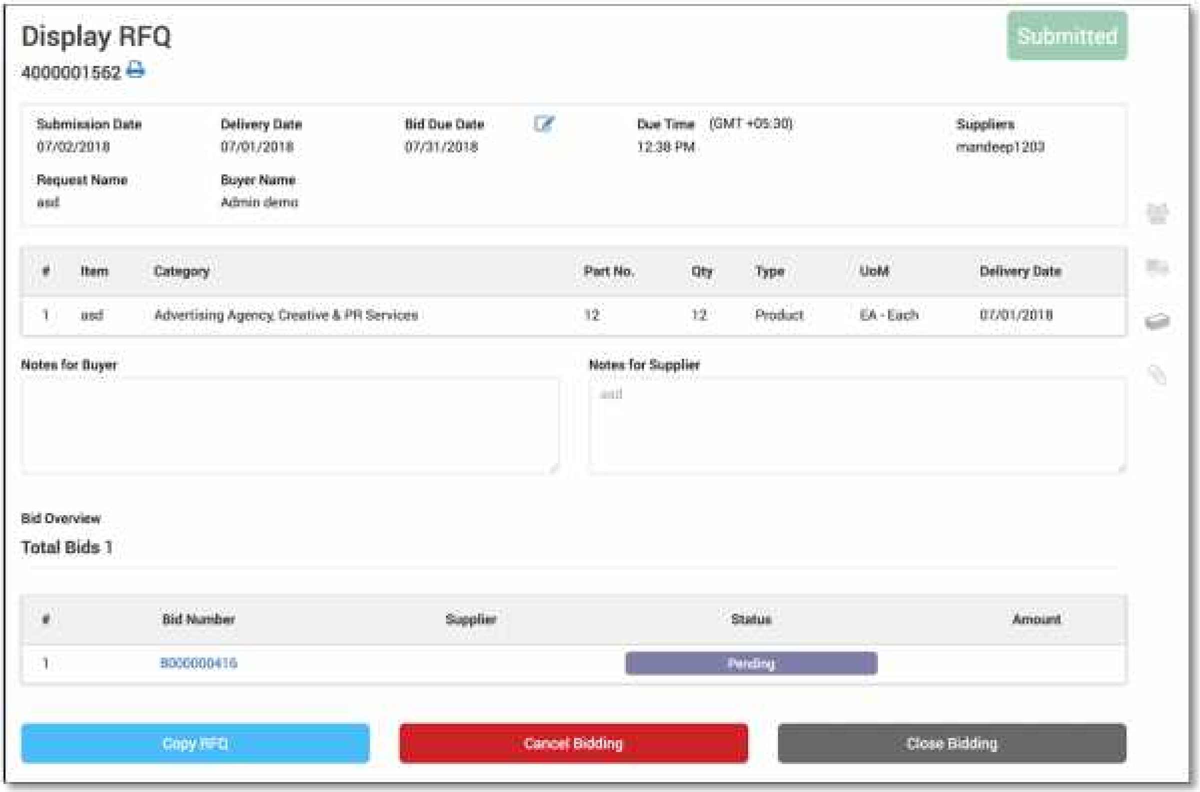
2. **Side panel buttons for RFQ documents:** Users can now access the side panel buttons on all RFQ documents - Request Form, RFQ, and Bids. Users can see information pertaining to: purchasing parties, suppliers, related documents, and attachments. By navigating to the related documents section *(figure A pictured below),* users can reference and link back to all of the related documents in the flow *(figure B pictured below)*. This feature provides users visibility to detailed information surrounding the RFQ documents.

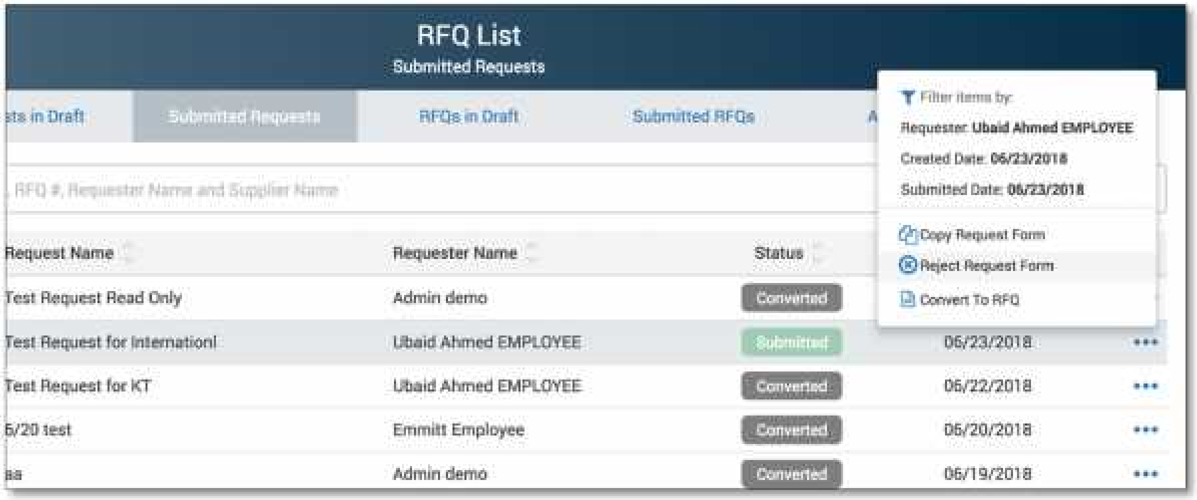




3. **Copy RFQ document functionality:** Users can now copy the RFQ document either from the display RFQ page or the RFQ list page by clicking on the ellipsis and selecting “Copy RFQ.”

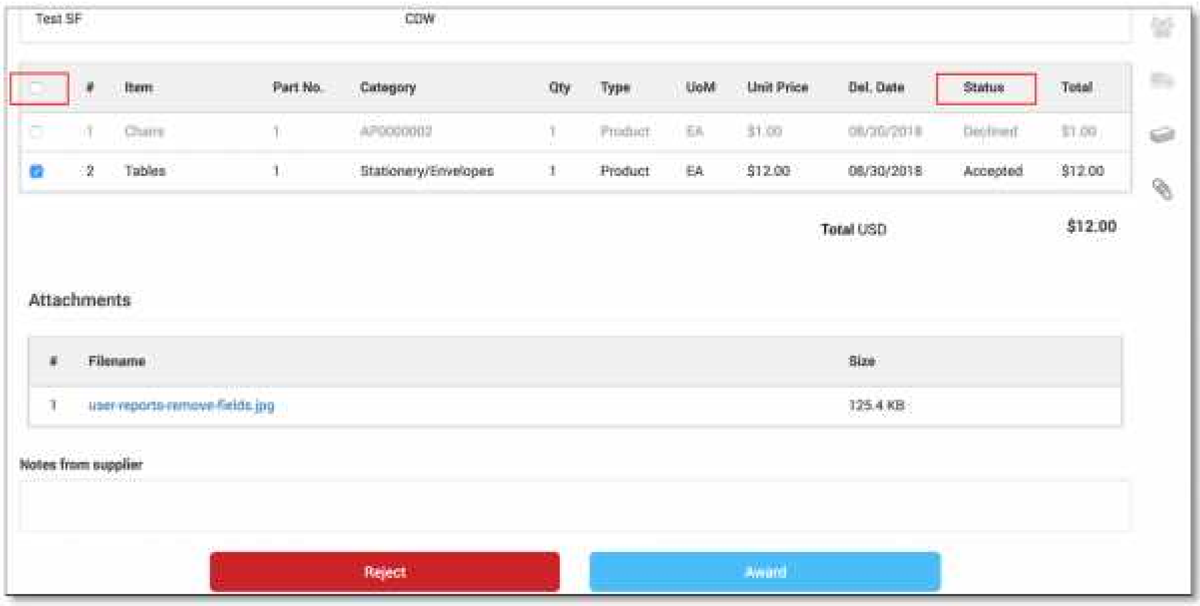


4. **Copy Request Form functionality:** Users can now copy the Request Form document by going to the RFQ list page, clicking on the ellipsis and selecting “Copy Request Form.”

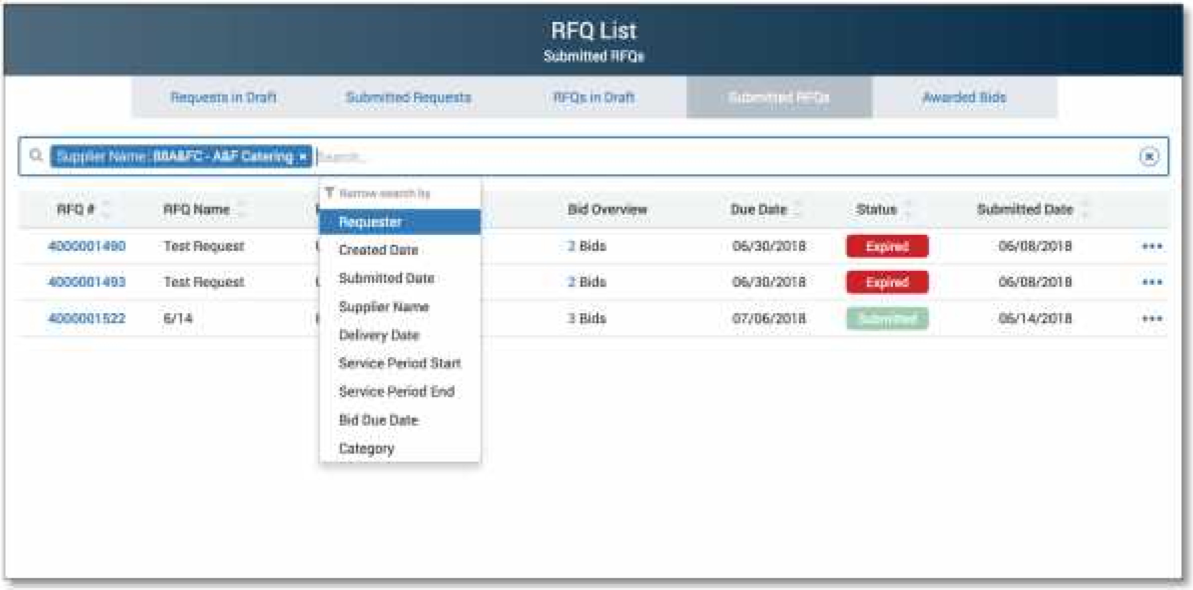


5. **Pre-populated values for the Request Form and RFQ when adding a new item:** To help user in filling out the RFQ documents, we've now added pre-populate values at the header and line item level. On the Request Form and RFQ document, when clicking on "Add Item" the type - "product" and UoM - "Each" is pre-populated. When selecting type - "service", the UoM - "Activity Unit" is pre-populated. On the RFQ, the time, time zone, and the requester name are pre-populated on the header. Pre-populating this information speeds up the data entry process and provides a more convenient experience for users.

6. **Select which line items to approve while awarding the Bid!** When your suppliers have submitted bids, users can now select which items they would like to award or reject. Users have the ability to select all line items or items individually to ultimately award or reject. This helps users to be selective in the line items that they actually need/want.

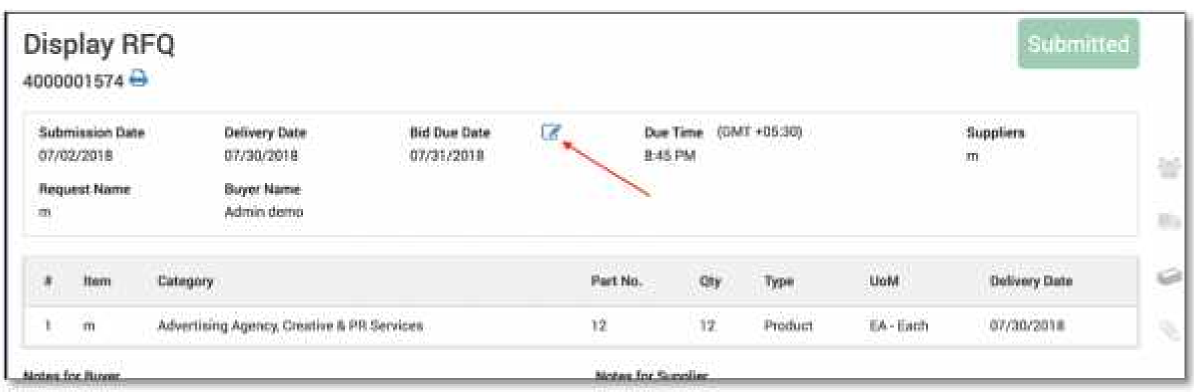


7. **RFQ Search enhancements:** On the RFQ list page, users now have access to our most sophisticated and powerful table search! Users can search for documents using multiple filters and/or specific document content in the search bar. Available filters are: ‘Requester, Created Date, Submitted Date, Supplier Name, Delivery Date, Service Period Start, Service Period End, Bid Due Date, Category”. User can also use ‘Item Description and Item Part Number’ to search for specific documents. This will help users locate their document quickly and accurately.



8. **Attachment checkbox available on the Create RFQ:** Users have the ability to select which attachments get sent to the suppliers and which do not. By default, all attachments that come over from the request form will be included in the RFQ to the suppliers, but users now have the ability to select which attachments to include or exclude. This gives the user the flexibility to send over the appropriate documents as needed.

9. **Ability to extend Bid due Date and Time:** Users now have the ability to extend the bid due date/time on an RFQ after an RFQ has been submitted to suppliers. This gives users the flexibility to allow for ample time for the bidding process to complete, ensuring they get the best value with each Quote they receive.



When you click on the Pencil (edit) icon, the user will receive the following modal which will allow him/her to change the bid Due Date for the selected RFQ.

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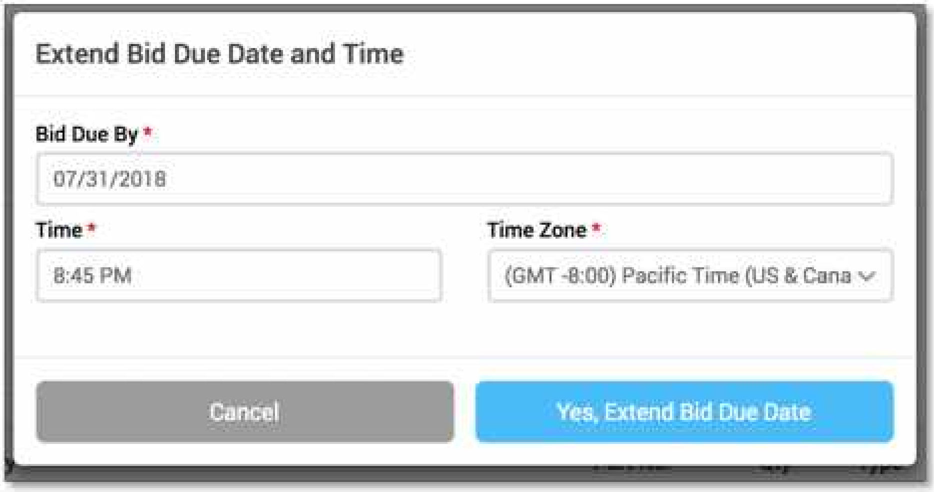

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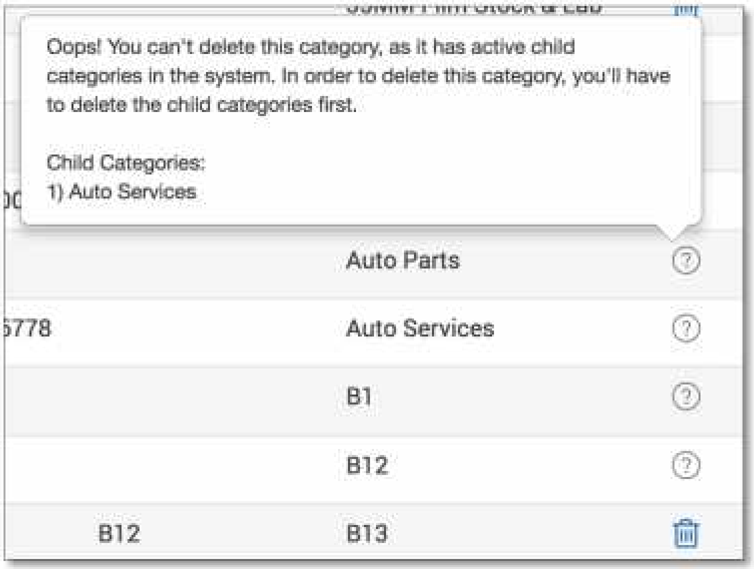
Vroozi Discovery Features

What's New…

1. **Category Deletion:** Users that have Vroozi Discovery can now delete their supplier discovery specific categories. You may not delete categories that have active associations to other categories, but once those associations are inactive or deleted, and there are no longer any associations, a category can be deleted, this is to prevent any unforeseeable issues from happening in the system.
   The deletion of a category also updates the search so that the category will no longer be searchable. This new feature is important for users as is provides them the ability to manage their categories to their business needs.



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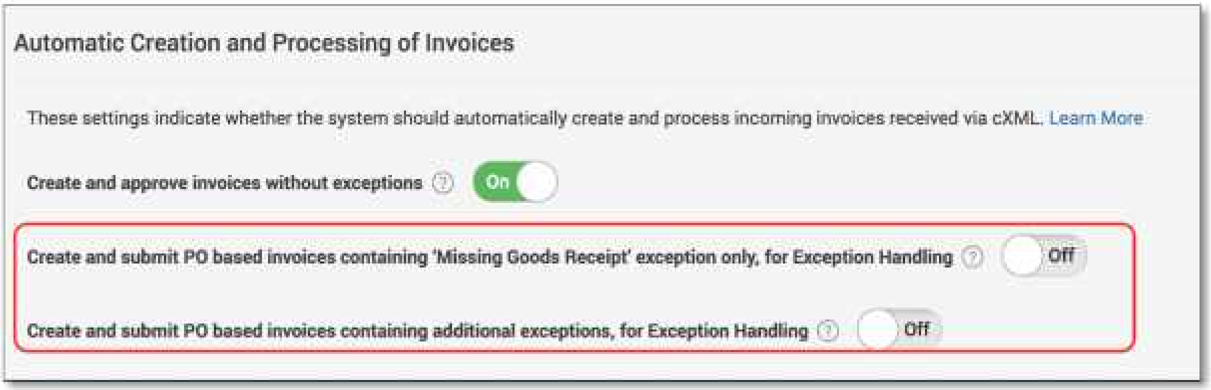
Vroozi Invoice Features

What's New…

1. **Enhancements to 'automatic' processing of invoices:** a new set of settings designed to drastically reduce manual actions/work in invoice processing, thereby minimizing Invoice Cycle Time and Cost of Processing an invoice are now available for Admins. These settings can be set to 'On' or 'Off on the ***'Accounts Payable -> Settings -> Preferences*'** page; by default, these settings are set to 'Off'.
    a. *<u>Setting #1:</u>* When this setting is 'On', PO based invoices (received via cXML) created by the system that contain a 'Missing Goods Receipt' exception is automatically submitted for Exception Handling to a user or group of users configured by the Admin. This setting is not applicable for invoices that also contain additional exceptions, such as 'price' or 'Qty' mismatch.
    b. *<u>Setting #2:</u>* When this setting is 'On', PO based invoices (received via cXML) created by the system that contain the following exceptions are automatically submitted for Exception Handling to a user or group of users configured by the Admin.
        i. Line Item Price Exception
        ii. Line Item Quantity Exception
        iii. Subtotal Exception
        iv. Total Quantity Exception
        v. Line Item Total Exception



2. **'Automatic' approval / submission of invoices:** Three new settings are now available for Admins to set to 'On' or 'Off' on the ***'Accounts Payable -> Settings -> Preferences'*** page; by default, these settings are set to 'Off'. This feature is intended to drastically reduce manual actions/work in invoice processing, thereby minimizing Invoice Cycle Time and Cost of Processing an invoice.

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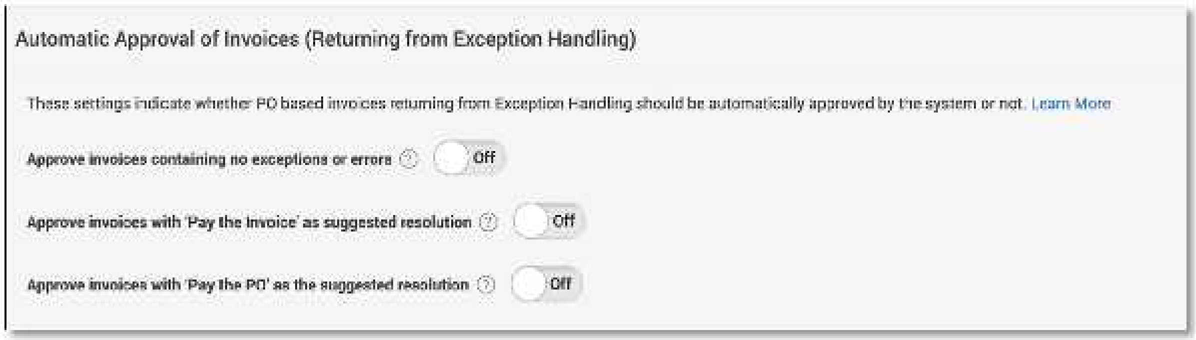
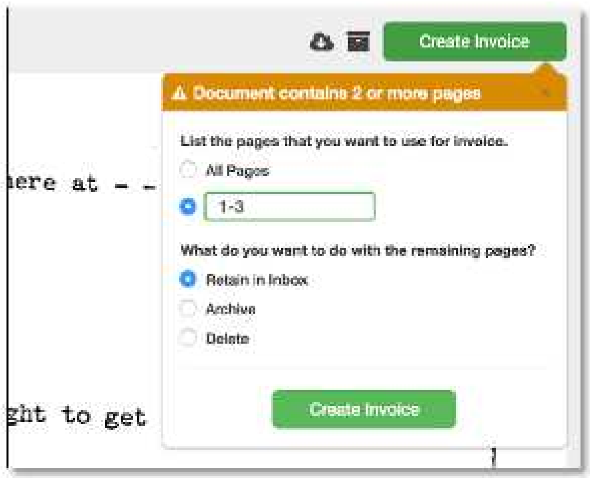
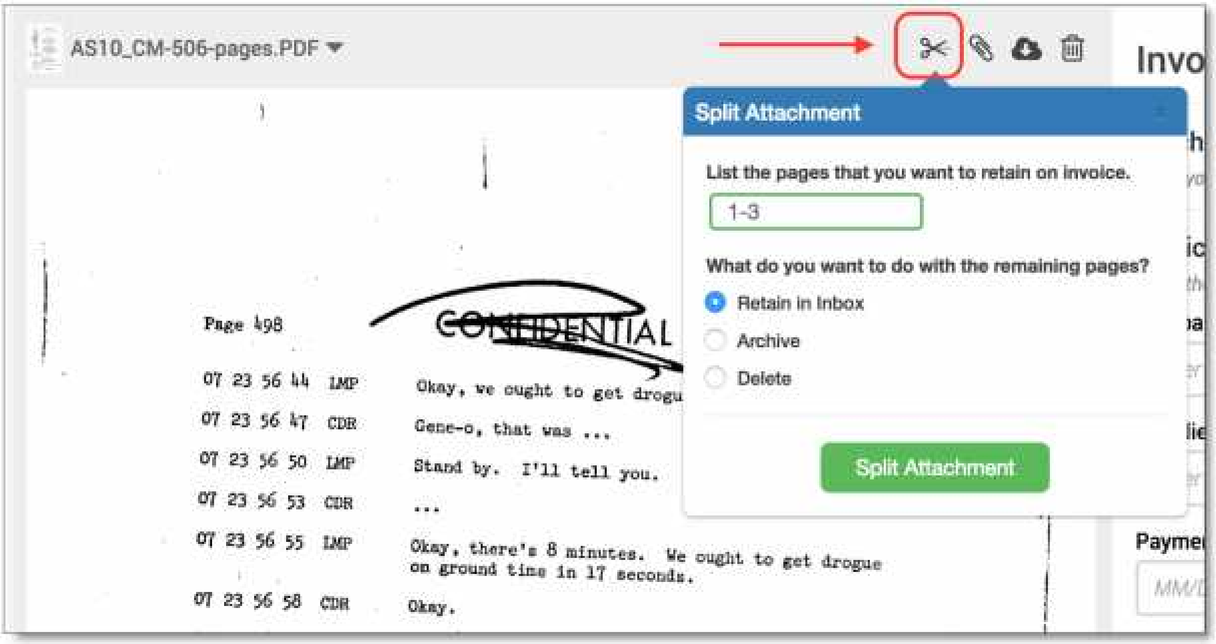
a. *Setting #1:* When this setting is 'On', invoices returning from Exception Handling with no further exceptions or errors are automatically submitted for approval or are automatically approved by the system. These invoices are then ready to 'Post' to your financial system.
b. *Setting #2:* When this setting is 'On', invoices returning from Exception Handling with 'Pay the Invoice' as the suggested resolution are automatically submitted for approval or are automatically approved by the system. These invoices are then ready to 'Post' to your financial system.
c. *Setting #3:* When this setting is 'On', invoices returning from Exception Handling with 'Pay the PO' as the suggested resolution are automatically submitted for approval or are automatically approved by the system. These invoices are then ready to 'Post' to your financial system.



3. **Functionality to split PDF documents received on Invoice Inbox:** Users can now split an invoice document received in your Invoice Inbox (Vroozi Hopper), while creating the invoice or after it has been created.
    a. *Before invoice is created:* While creating an invoice in Vroozi, users are able to specify the pages on the invoice document (on the Inbox) that are relevant to the invoice. The remaining pages can be retained on the Inbox to create additional invoices, deleted, or archived.



b. *After invoice is created:* Users are able to split the invoice document attached from the Inbox, by clicking on the newly added 'scissors' icon above the document. The remaining pages can be saved on the Inbox to create additional invoices, deleted, or archived.



4. **Re-assignment of invoices in Exception Handling:** AP users will now be able to easily re-assign invoices that they submitted for Exception Handling to other users or group of users. Previously, AP users had to return the invoice to themselves and then select another user or group to submit it to, which was cumbersome.
   Additionally, Exception Handler users (to whom invoices in 'Exception' are assigned to) are also able to re-assign invoices to other users or group of users, based on certain conditions.

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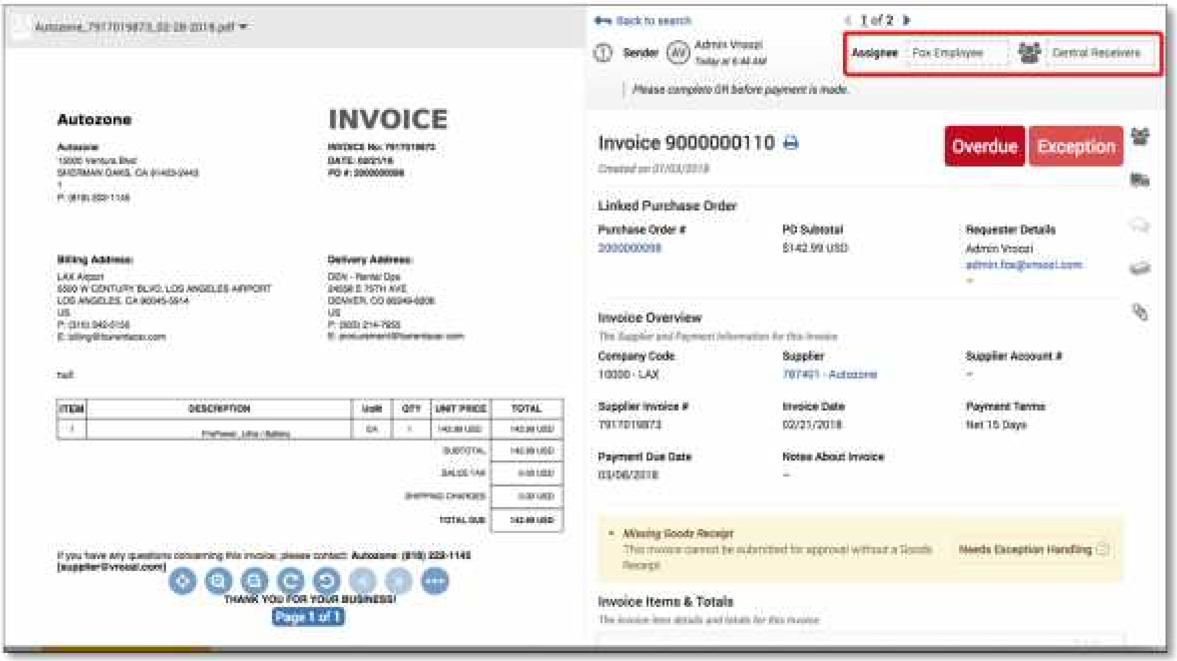
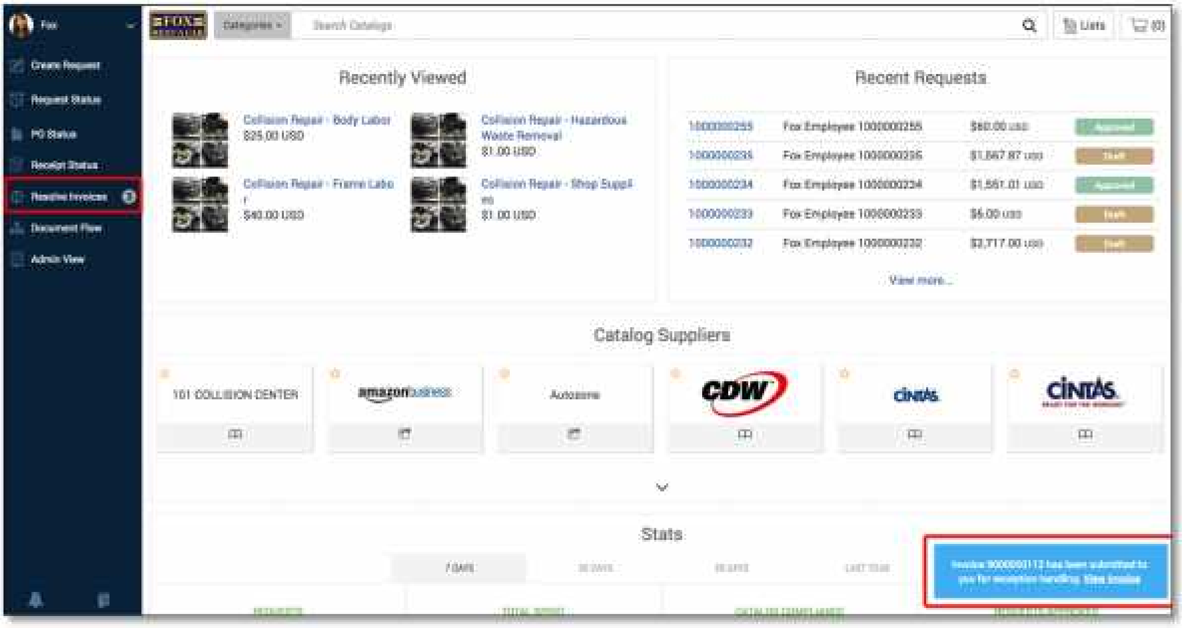
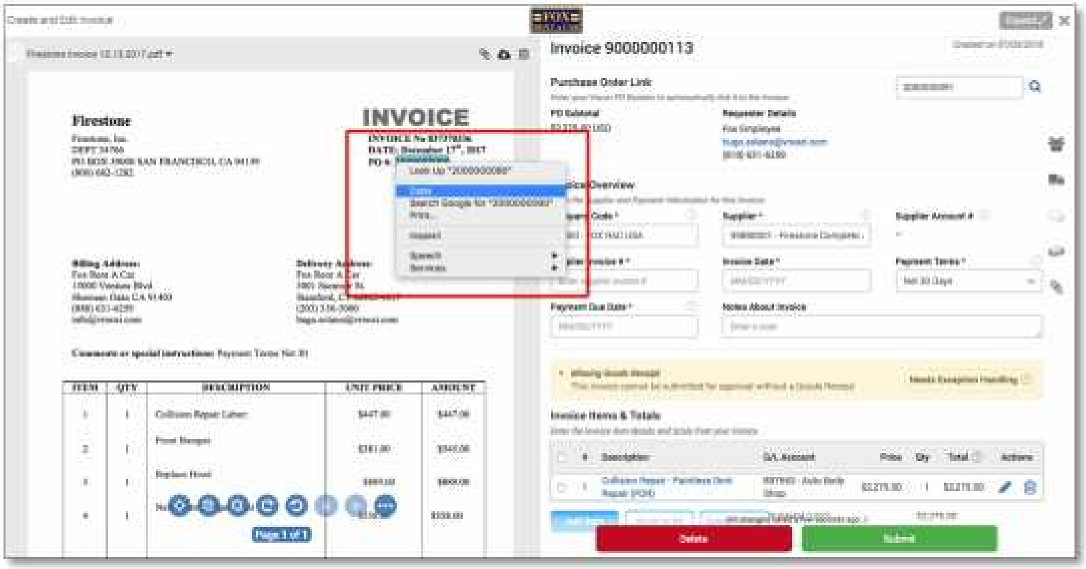


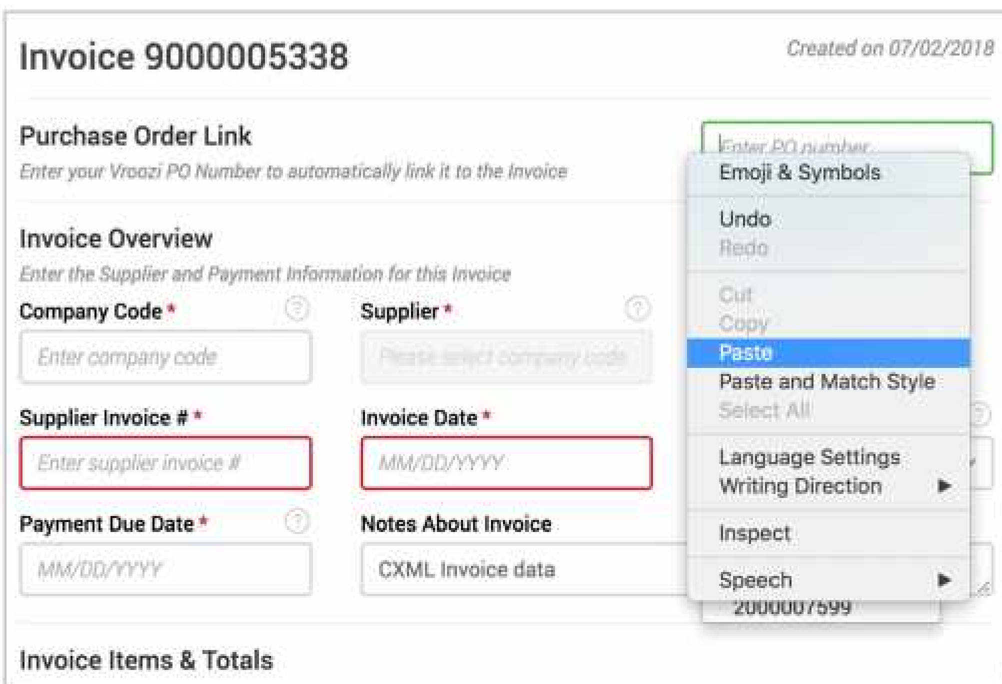
5. **Display of real-time notifications to users in certain situations:** The system will display real-time notifications to AP and Exception Handler users on the bottom right corner of the page in the following situations:
    a. When invoices are submitted to them (for Coding, Approval, or Exception Handling)
    b. When invoices are returned to the user who submitted them. This is intended to help users take immediate action on invoices submitted or returned back to them.



6. **Capability to 'copy' values from electronic PDF invoices:** AP users who are creating or editing an invoice would now be able to 'copy' values from the electronic PDF invoice attached on the left (of the 'Create/Edit Invoice' page) and 'paste' them on the corresponding fields on the Create/Edit Invoice form on the right. Previously, AP users had to manually key in the values on the Create/Edit Invoice form by visually referencing the attached PDF invoice, which was error-prone and time consuming.
   a. *'Copying' value from PDF invoice:*

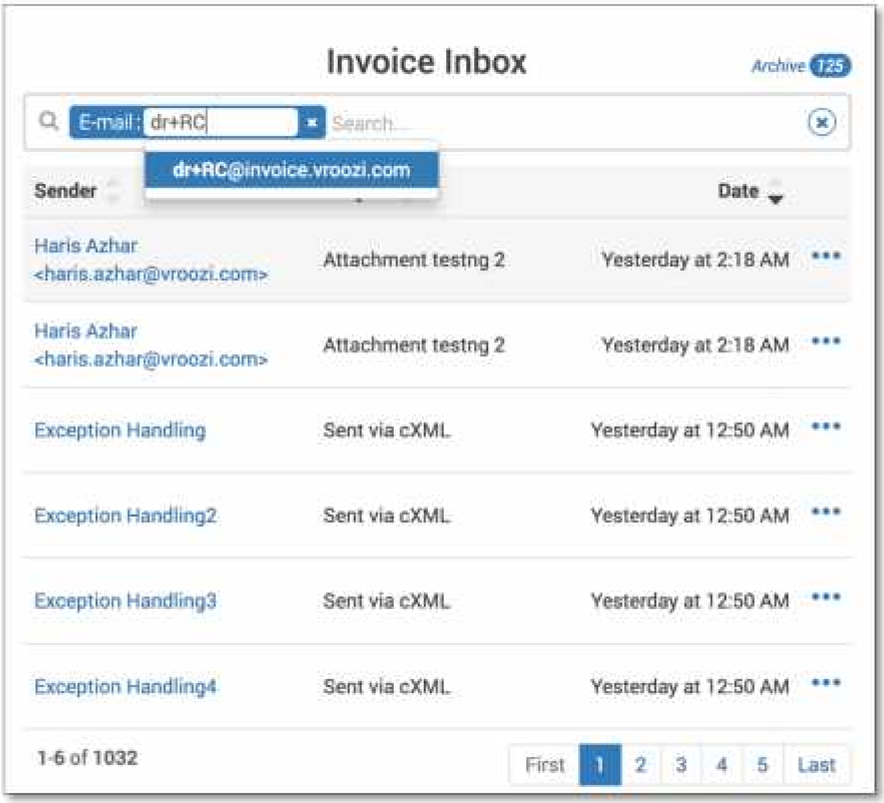


   b. *'Pasting' value into corresponding field in 'Create Invoice' form*

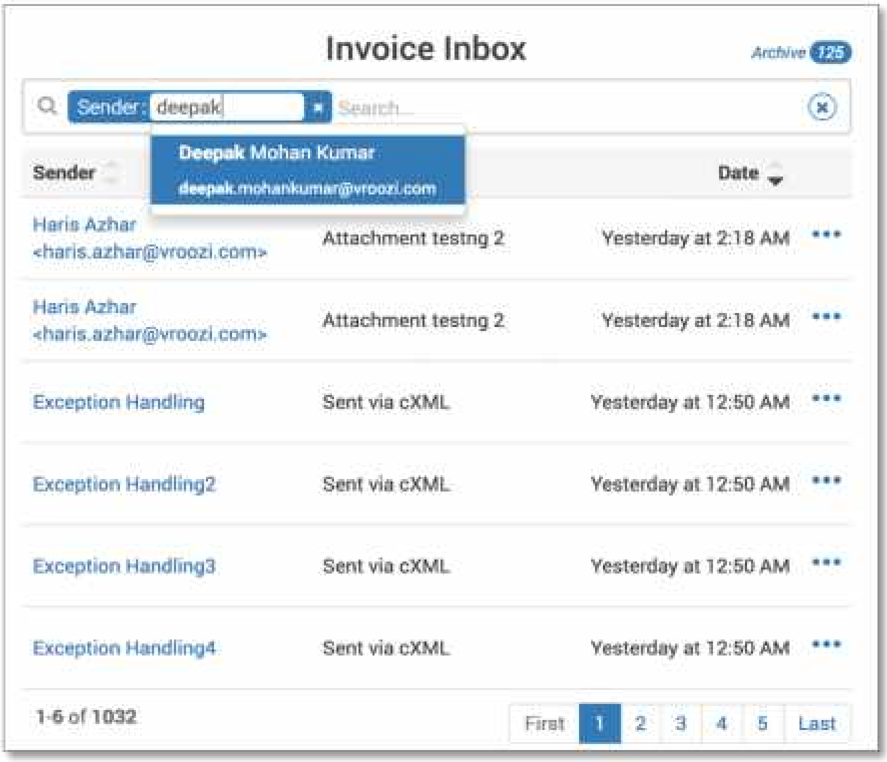


7. **Persistence of filters, sorting, and location on Invoice list pages:** The search criteria, sort criteria, and page number entered by AP and Admins users on a page that contains a list of invoices (Track Invoices, Approve Invoices, Code Invoices, and Resolve Invoices) will be saved by the system until the user is logged out. Every time the user navigates back to the page (either by pressing the 'back' button or directly navigating to the page), they will be able to continue from where they left off as the above information is saved by the system.

8. **Addition of 'search filters' to Inbox page:** AP and Admin users will now be able to filter invoices submitted by Suppliers (to the 'Inbox') using the newly introduced 'E-mail' and the 'Sender' filters.
    a. *'E-mail' filter:* Users will be able to filter invoices submitted by Suppliers (and others) to the e-mails / e-mail aliases configured in the system.



    b. *'Sender' filter:* Users will be able to filter invoices submitted by Suppliers (Senders) via e-mail or cXML, using the Senders' name (for e-mail and cXML invoices) or their e-mail address (for e-mail invoices only).



9. **Capability for AP users to mark certain invoices as 'Posted':** Going forward, AP users will be able to designate invoices in 'Posting' and 'Posting Failed' statuses as 'Posted'. Previously, AP users had to reach out to Vroozi Support to perform database updates when invoices were stuck in 'Posting' and 'Posting Failed' status and required updating to 'Posting' status. AP users can mark an invoice as 'Posted' on the Post Invoices page, the 'All' status page, and on the invoice page.

   NOTE*: Please ensure that your invoice has made it to your financial system before marking this invoice as 'Posted'.*

   a. *<u>Mark invoice as 'Posted' from a 'status' page</u>*

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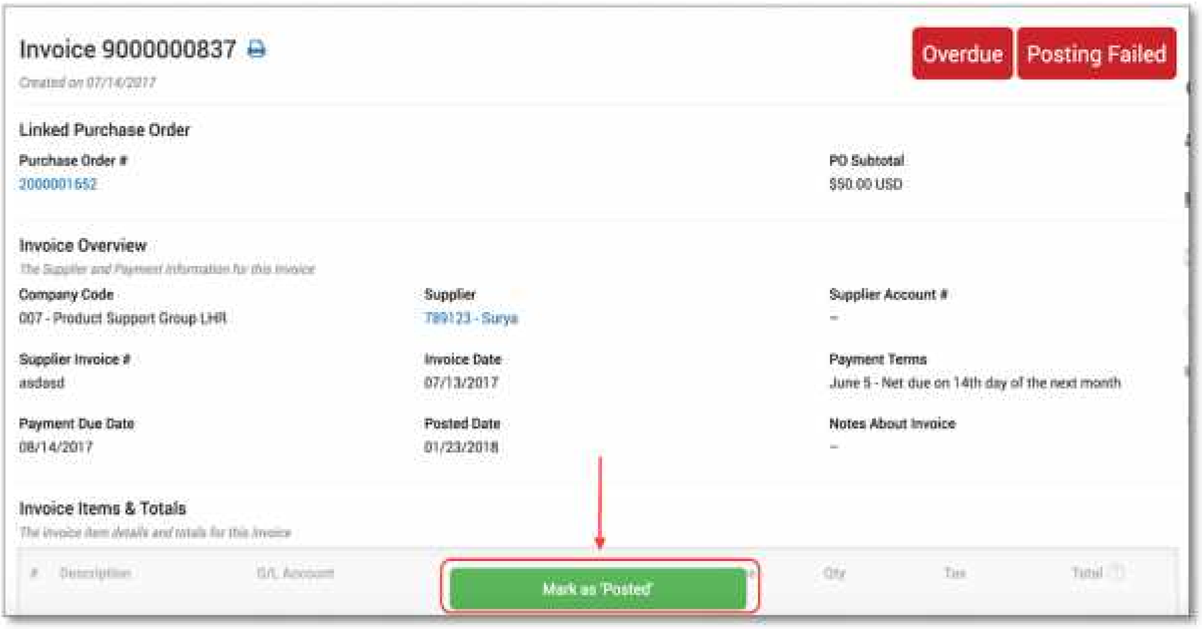
b. *Mark invoices as ‘Posted’ from ‘Post Invoices’ page*

c. *Mark invoices as ‘Posted’ from the invoice page*



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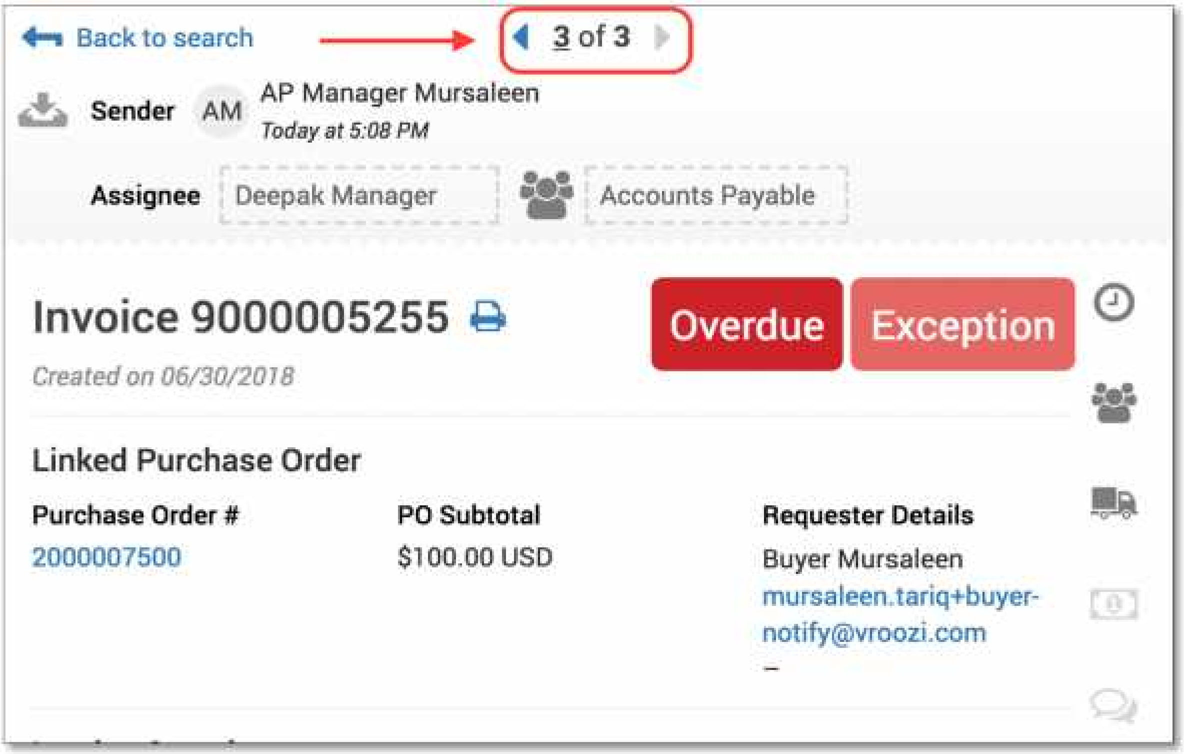
10. **Maximizing ease of navigation between invoices:** AP users and Admins are now able to easily navigate from one invoice to another when they are viewing a specific invoice from a list of invoices, for example, from Tasks (in Inbox), invoice list pages (including Code Invoices, Resolve Invoices, and Approve Invoices). Similarly, when AP users take action on a specific invoice, for example, if they code an invoice, approve an invoice, or submit an invoice, they will be automatically navigated to the next invoice in the list, taking into account the search criteria, sorting criteria, and page number.



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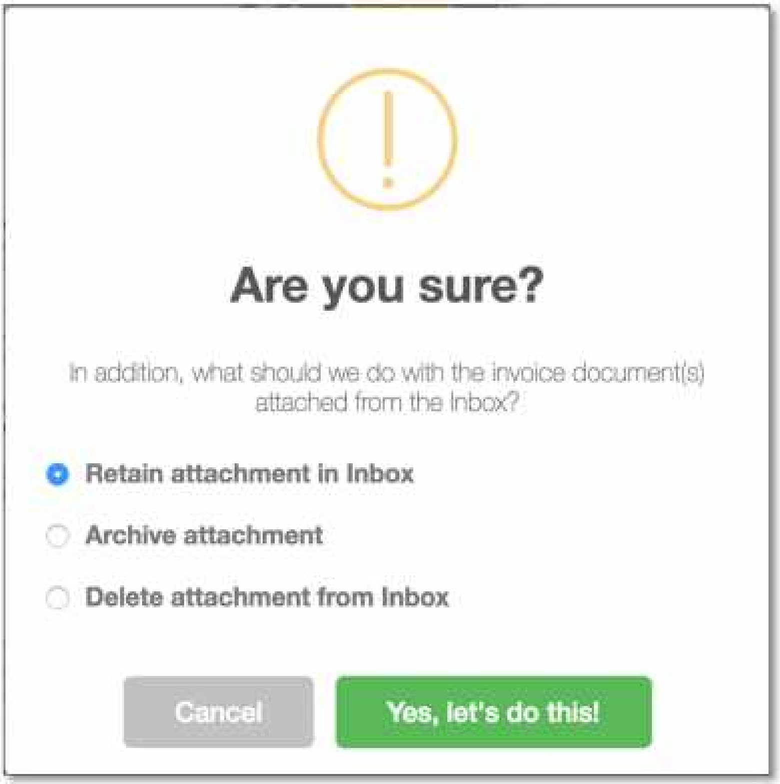
11. **Additional options while deleting invoice:** While deleting a Vroozi invoice (from the 'Create/Edit Invoice' page), users are now able to specify what they want to do with the PDF invoice document attached to it from the Inbox. Users will be able to:
    a. Retain the PDF invoice on the Inbox
    b. Delete the PDF invoice from the Inbox
    c. Archive the PDF invoice



12. **Addition of 'Payment Due' date to Invoice CSV Export:** A new field, Payment Due Date, has been added to the CSV export file that is posted out of Vroozi. The rightmost column, BG, contains the 'Payment Due Date' (Column header and Value), which represents the date when the payment is due for an invoice. This only applies if you have CSV-SFTP connector enabled in your company settings.