# Getting Started with Vroozi

## Table of Contents

# USER LOGIN

This guide outlines the steps you will need to take as a new user, including any technology requirements, login, and verification processes that need to take place before creating requests.

## BROWSER COMPATIBILITY

Vroozi Purchase runs on the latest two versions of *Internet Explorer*, *Firefox*, *Chrome*, and *Safari*. Please check that your computer and/or mobile device browser is up to date

## ACCESSING VROOZI (REGISTRATION EMAIL)

To get started, you will receive a welcome email notifying you that your account has been created. The look of the email may vary based on whether your organization uses Single Sign On Authentication or requires individual sign on to Vroozi.

Follow the prompts in your Welcome email to begin accessing Vroozi.

**Registration for Non-SSO users:**

1. Look for the *Vroozi Purchase Registration* in your email inbox from **notifications@Vroozi.com**. If you do not see it, check your *spam box*.

2. Click the green Activate Account button. You will be redirected to the Create Password window.
   - If the pictures do not load, copy and paste the link below the green button into your browser instead to set your password for the first time.
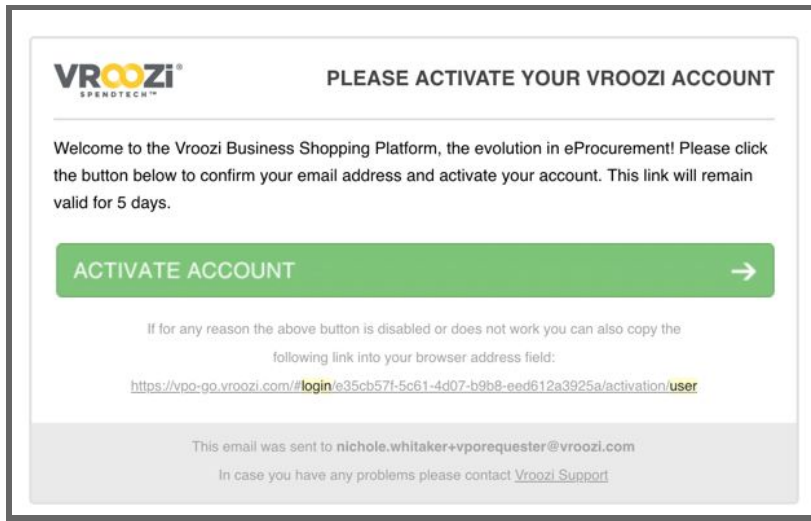
- Click 'Set Password'
- Your password must contain the following:
  - At least 1 number
  - An uppercase letter
  - Minimum of 8 letters
  - At least 1 non-alphanumeric number
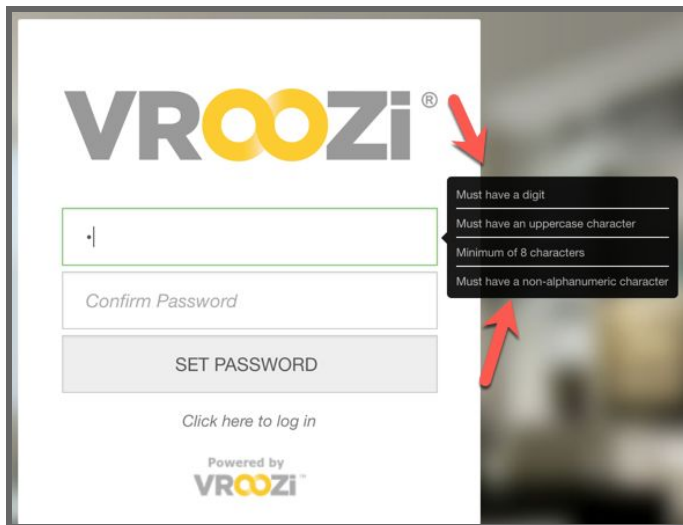


**Note:** If your passwords do not match or do not meet the character requirements, the Set Password button will not be clickable until corrections are made.

## PASSWORD RESET

Password reset is available if you have forgotten your password, deleted or used your initial *Registration Email.*

1.  Start by navigating to the Vroozi Vroozi Purchase login page—if you aren't already there, go to **https://go.Vroozi.com**.

2.  Type in your email address.

3.  Click 'Reset Password'. An email will be sent to you from **notifications@Vroozi.com**.

4.  Create your *New Password* following the password requirements listed above. It must be different than your previous password(s).

5.  Confirm the same password again directly below.

6.  Click '*Set Password'*.

7.  Select the 'Click here to Log In' link in order to take you to the *Vroozi Purchase* login page.

    ○   If the pictures do not load, copy and paste the link below the green button into your browser instead to set your password for the first time.

    ○   If you click on the link and it says that it "has already been used, you may have accidentally double clicked it. Try resetting your password again from step #1 of this section.

# USER PROFILE

Applies to all Vroozi Purchase roles including Sourcing, Expense & Analytics.

## SET PROFILE INFORMATION
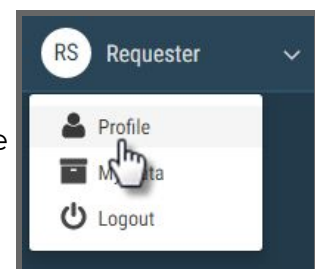
Before executing any task in Vroozi, verify or update your Profile Information. Depending on your organization.

1.  From the Homepage, click your name to reveal a drop down menu on the top left of the screen.

2.  Enter the Personal Details including Contact Title and Telephone Number. Adding your personalized avatar or Profile Picture is optional.

3. If you are an Approver, you will want to create a 4 digit numeric PIN Code. This will enable you to approve or reject Pending Requests directly from email or smartphone. (indicated below)

4. Here you can also reset your password.
   - There is a separate 'Save New Password' button.

5. Once the required details are complete, 'Save' will become enabled.



6. Scroll down to the bottom of the page and verify the *Document Defaults*; *Cost Center*, *Currency* and *Company Code*. Depending on your organization's protocols, the *Document Default* drop down options may vary from what is pictured.

> **Note:** ll users have the ability to edit the document default settings *unless* a restriction has been added at user role creation. This restriction would inhibit the user's ability to edit the defaults of a PR or PO which affects the user's ability to change the document default coding set in their profile.

7. If it has not already been populated, click 'Create Address' to setup your *Default Address* for the first time.

8. Enter in all of the required *Address* information.

9. Click 'Save Address'. *Your Default Shipping Address* has been set.

| My Document Defaults | | |
|---|---|---|
| **Cost Center** | **WBS Element** | **Shipping Address** |
| 100000 - Executive | 26225 - Alaskan Air | CT Office |
| **Company Code** | **Class** | CT Office |
| 10001 - Vroozi | Click to select value | 50 LOVELY ST |
| **Project** | **Currency** | AVON, CT 06001-3138 |
| Click to select value | USD | US |
| **Plant** | | ✉ nichole.whitaker+vporequester@vroozi.com |
| 56 - Los Angeles | | |

# NAVIGATION TOOLS

## LOGO

Your Logo acts as your 'Home' button. Clicking it will redirect you back to your login screen.
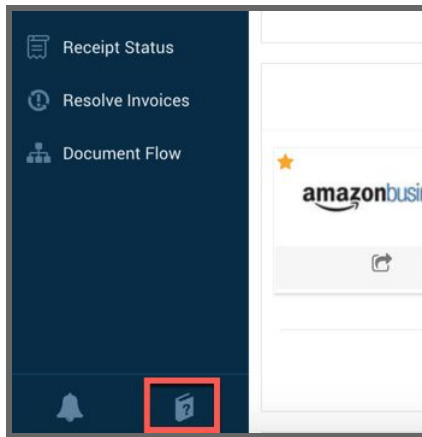


## ANNOUNCEMENTS

Click the bell icon to view administrator announcements. If messages are awaiting your review, a notification will appear next to the bell identifying the number of messages.
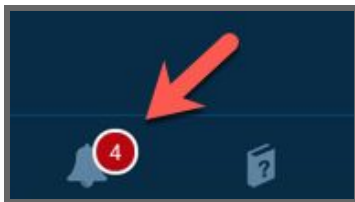


## VROOZI HELPDESK

1. From the *Homepage*, click on the *Help* icon near the bottom left of the screen. (shown below) This will open a new browser tab directing shoppers to the *Help* page.

2. It is recommended that you search for any articles that may answer your question. If the *Knowledge Base* does not address what you need, click the *Submit a Request* link at the top right of the page.

3. Fill out all of the mandatory fields and dropdowns marked with a red asterisk*.

> **Note:** When filling out the Description area, the more specific, the better the helpdesk agent will be able to assist you. Attached screenshots are optional but recommended.

4. Click 'Submit'. You will receive a notification at the top of your screen and a confirmation email immediately after submission. Any updates will be communicated to you via email from the *Vroozi Helpdesk*.

5. If you need to add more information to your ticket, or respond to a helpdesk agent, simply reply to the email. You may cc other people, and they will be included on *all* future ticket correspondences. When the ticket is solved, or is pending your response, you will also be notified via email.

# Navigation Basics

## Hyperlinks

Anytime font or document numbers are displayed in blue, this indicates a hyperlink to view more specific details regarding that item or document.

**Purchase Requester example:**



**Accounts Payable example::**



## Expand field

Downward arrows as shown below indicate you can expand the field to reveal additional options.

**Expanded Field revealed**