

# Vroozi Release Notes

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Indicates a User Interface enhancement

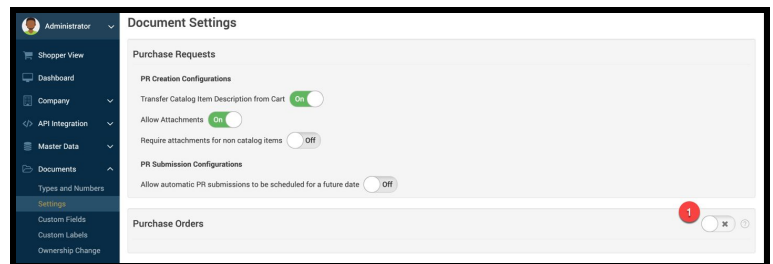
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# Vroozzi Purchase (Administrator)

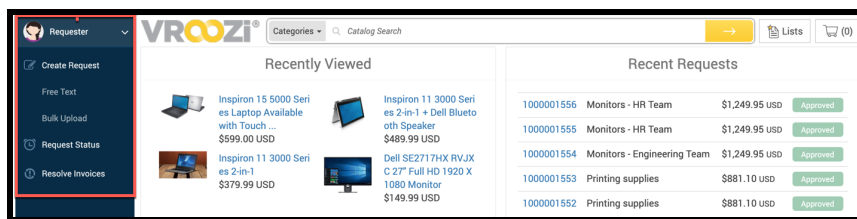
## DISABLE PURCHASE ORDER FUNCTIONALITY

Through the use of two new configurations, Administrators can now choose to alter Purchase Order functionality within the Vroozzi platform.

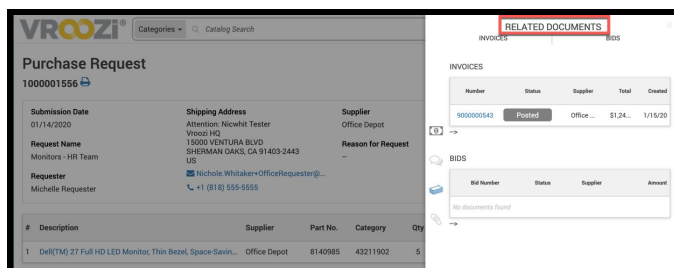
The first configuration if toggled *off*, will turn Purchase Order functionality completely off. Requisitions can still be created but will not convert to POs within the Vroozzi system. (*Toggle #1* shown on right) With the disablement of PO functionality. 'PO Status', 'Buy Route' and 'Document Flow' access will be removed from all user's navigation panels.



*Requester Panel with PO functionality disabled:*

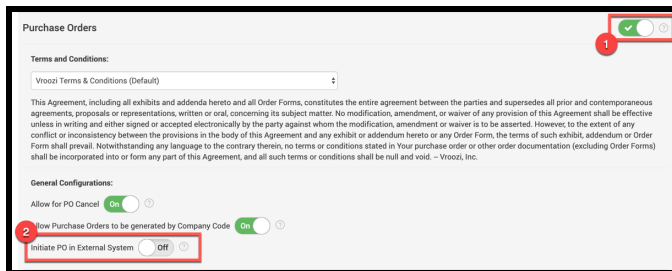


*The Document History will not include PO status:*

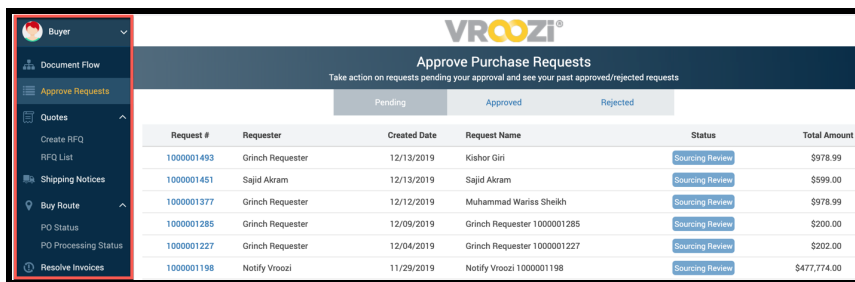


If *Toggle #1* is enabled, the buying organization can choose to turn off PO functionality within Vroozzi and instead create POs in an external system by enabling 'Initiate PO in External System'. (*next page*) Requisitions created within the Vroozzi System will feed into the external system for PO conversion and submission to supplier.

Configurations as seen in the Administrator Panel: Documents > Settings > Purchase Orders:



Enablement of POs through an external system will disable the 'Ready for Sourcing' and 'Create PO' capabilities for Buyers, Sourcing Approvers and Administrators. (shown below)



Request #	Requester	Created Date	Request Name	Status	Total Amount
1000001493	Grinch Requester	12/13/2019	Kishor Giri	Sourcing Review	\$978.99
1000001451	Sajid Akram	12/13/2019	Sajid Akram	Sourcing Review	\$599.00
1000001377	Grinch Requester	12/12/2019	Muhammad Wariss Sheikh	Sourcing Review	\$978.99
1000001285	Grinch Requester	12/09/2019	Grinch Requester 1000001285	Sourcing Review	\$200.00
1000001227	Grinch Requester	12/04/2019	Grinch Requester 1000001227	Sourcing Review	\$202.00
1000001198	Notify Vroozzi	11/29/2019	Notify Vroozzi 1000001198	Sourcing Review	\$477,774.00

In order to retain PO visibility within the Vroozzi system, a buying organization using an external system for PO creation will need to access the connector through an open Vroozzi API. If PO visibility is not required, no connector is needed.

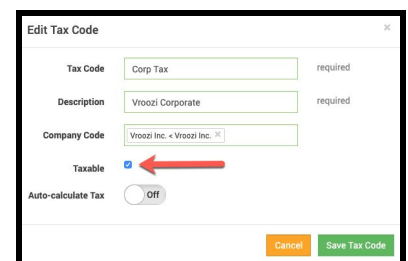
## NEW TAX CODE ATTRIBUTES

Two new attributes have been added to the Tax Code record, 'Taxable' and 'Auto-Calculate Tax'. If the 'Taxable' checkbox is checked (shown on right) it implies that the Tax Code is taxable.

Checking 'Taxable' will prompt the Administrator to determine if the taxes should be Auto-calculated when the tax code is referenced. By default this toggle is set to *Off*.

If the 'Auto-calculate Tax' toggle is turned *On*, Administrators are required to enter a tax percentage to be applied.

Administrators can also elect to apply tax to shipping charges. (shown on next page)



**Edit Tax Code**

Tax Code: Taxable required

Description: Corp required

Company Code: 1000 x Vrooz Corporate Inc.

Taxable: ☒

Auto-calculate Tax: **On**



**Tax Percentage: 8%** required

Include Shipping Charges: ☐



Cancel Save Tax Code

With 'Auto-calculate tax', once the code is saved, any new Requisitions linked to the referenced Tax Code will display taxes according to the code configuration.

*Tax Calculation for Code with Auto-calculate enabled:*

#	Description	Supplier	Part No.	Category	Qty	UoM	Unit Price	Del. Date	Total ⓘ	Action
1	New Dell Chromebook 11	Office Supply Inc	2609031	43231513	<input type="text" value="1"/>	EA	\$249.00 →	01/26/2020	\$249.00 →	 
<div><div>Add Line Item</div><div>Upload Line Item(s)</div><div>Add Attachments</div></div>										
Subtotal (USD)									\$249.00	
Shipping Charges (USD)									\$0.00	
Tax (USD)									\$19.92	
Total (USD)									\$268.92	

*Auto-Calculate Tax Calculation with Shipping Charges included:*

#	Description	Supplier	Part No.	Category	Qty	UoM	Unit Price	Del. Date	Total ⓘ	Action
1	New Dell Chromebook 11	Office Supply Inc	2609031	43231513	1	EA	\$249.00 →	01/26/2020	\$249.00 →	 
<div><div>Add Line Item</div><div>Upload Line Item(s)</div><div>Add Attachments</div></div>										
Subtotal (USD)									\$249.00	
Shipping Charges (USD)									\$5.00	
Tax (USD)									\$20.32	
Total (USD)									\$274.32	

The auto-calculate tax is intended for buying organizations without a current tax connector. Buying organizations with a tax connector (ex: Avalara) will continue to use the tax calculations defined by the outside connector.

## Vroozi Invoice (AP Processors & AP Managers)

### MULTI-PO INVOICE EXCEPTIONS ASSIGNMENT

For multi-PO invoices AP Processors can now assign PO exception review to the originator of each PO with exceptions. Previously only one Exception Handler could be assigned and would be responsible for resolving *all* exceptions regardless of who initiated them.

For multi-exception invoices, AP Processors can still choose any applicable Exception Groups but can now also choose the specific PO creator to resolve their exception. (shown on right)

Once one user resolves their exception, the Invoice will return to the AP Processor via 'Tasks'.

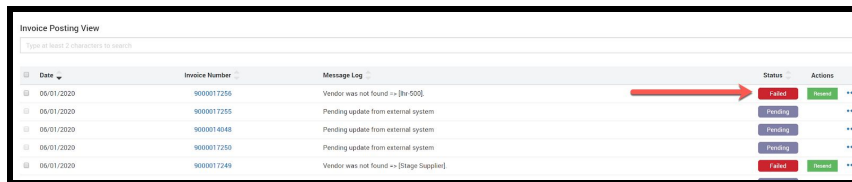
*AP user view of the returned Invoice displaying the remaining exception:*

PO #	Requester	PO Total
20000001159	Requester Training	\$881.10
20000001130	Requester Training	\$558.62
2000001082	Requester Training	\$104.17

Once returned from the first assignee's exception review, the AP user will see on the invoice that the sender's exception has been resolved. (shown above) The invoice can now be assigned to the next PO creator or Exception Group. (shown below)

## QUICK ACCESS TO 'RESEND' INVOICES

A **'Resend'** feature has been added to the invoice line header of the 'Post Invoice' page. This replaces the need to individually open each invoice that failed to process; instead users can click 'Resend'.

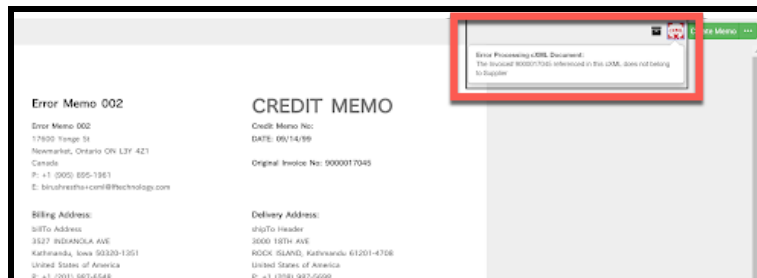


Date	Invoice Number	Message Log	Status	Actions
06/01/2020	9000017256	Vendor was not found => [See 500]	Failed	Resend
06/01/2020	9000017255	Pending update from external system	Pending	
06/01/2020	9000014548	Pending update from external system	Pending	
06/01/2020	9000017250	Pending update from external system	Pending	
06/01/2020	9000017249	Vendor was not found => [Stage Supplied]	Failed	Resend



## WORKFLOW OPTIONS FOR INVOICE PROCESSING ERRORS

Errors during cXML invoice/memo processing will now include an error message workflow rather than stopping the process completely. The processor can view the error message and if they decide to, continue to process invoice/memo.



**Error Memo 002**

Error Memo No: 17800 Yangi St  
Newmarket, Ontario ON L3Y 4Z1  
Canada  
P: +1 (905) 855-1961  
E: bilal@vsthe.com@Technology.com

**CREDIT MEMO**

Credit Memo No: 06/14/99  
DATE: 06/14/99  
Original Invoice No: 9000017040

**Billing Address:**  
3527 INDIANOLA AVE  
Kathmandu, Iowa 50330-1301  
United States of America  
P: +1 (508) 992-6548

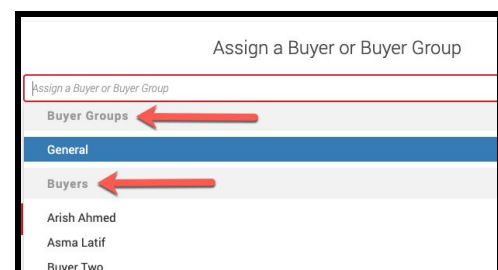
**Delivery Address:**  
ShipTo Header  
3000 18TH AVE  
ROCK ISLAND, Kathmandu 61201-4706  
United States of America  
P: +1 (508) 992-6548

**Error Processing cXML Document:**  
The document 9000017040 referenced in this cXML does not belong to Supplier

## Vroozzi Sourcing (Buyers & Requesters)

### ASSIGN RFQ FORMS TO BUYERS OR BUYER GROUPS

Requesters now have the option of submitting their RFQ forms to a Buyer Group for approval rather than one specific Buyer. The buyer group will be recommended based on the first supplier entered in the RFQ Form. All buyers within the group will receive email notification of the RFQ, at which point any member of the group can take action on it. Once a buyer from the assigned group opens the RFQ, the buyer then



Assign a Buyer or Buyer Group

Assign a Buyer or Buyer Group

**Buyer Groups**

**General**

**Buyers**

Arish Ahmed  
Asma Latif  
Buyer Two

owns the RFQ and the other buyers will not longer see

## CATEGORIES NOW CAPTURED ON RFQ FORM

In support of the above enhancement, Requesters and Buyers can now select an item's Category on the RFQ form. The Category field will include a pre-defined list of categories previously created in the Vroozzi system.

What would you like?

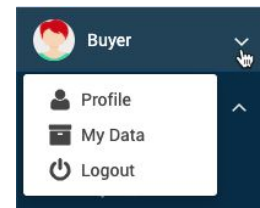
#	Type	Description	Category	Part No.	Qty	Unit	Del. Date
1	Product	Lenovo desktop monitors	Hardware Desktop		20	EA - EA	01/31/2020

Buttons: Add Line Item, Add Attachment

Once the category is selected, the buyers and groups listed under 'Assignment of Buyer or Buyer Group' will populate a listing of the appropriate buyer groups associated with that category.

## ALTERNATE BUYER SETTING

Similar to the 'Out of Office' functionality for Financial Approvers, Buyers will now be able to set an **Alternate Buyer** to act on their behalf. When configured, in the Buyer's Profile the *Alternate Buyer* can be selected from a pre-populated list of all users with the *Buyer* role. (shown on next page)



Buyer Assignment Settings:

Alternate Buyer → Buyer

- Abdullah Buyer
- Arish Ahmed
- Asma Latif
- Buyer Two
- Buyer hira

In this scenario, when an RFQ form is submitted by a Requester, both the original Buyer and designated Alternate Buyer will receive email notification of the form. Both Buyers can take the appropriate actions against it. Once one Buyer opens the form, the RFQ is then assigned to them and will be removed from the other Buyer's 'Submitted Requests' view.

## Product Resolutions

### SOURCING

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- ✓ **Previously:** POCR functionality was prohibited for Requesters whose PO was edited during BuyRoute. Requesters were only able to view the PO.

**Now:** Requesters are now able to perform a POCR on a PR that converted to a PO after BuyRoute review and/or editing.

### PURCHASE

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- ✓ **Previously:** Formatting issues were occurring with Swedish & Danish currencies.

**Now:** Swedish Krona (SEK) and Danish Krone (DKK) currency symbols and formatting now displays correctly.

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- ✓ **Previously:** Documents sent to the Hopper with Japanese characters were not displaying properly when opened.

**Now:** Invoices with Japanese characters will now come through the Hopper *without* any display errors.

### INVOICE

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- ✓ **Previously:** Invoices submitted for Exception Handling with a missing Goods Receipt (GR) exception(s) were *not* auto-transitioning away from 'Exception' status once receipt was confirmed.

**Now:** Invoices submitted for Exception Handling with a missing Goods Receipt (GR) exception(s) *are now auto-transitioning* away from 'Exception' status after the Goods Receipts have been created for all line-items.