Vroozi May 2020 Release Notes

The following enhancements are scheduled for release at *10:00pm PST on Friday May 15, 2020.*

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 Indicates a User Interface enhancement

Vroozi Catalog (Administrator)

CUSTOM FIELD DEFAULTS

Vroozi Purchase and *Vroozi Catalog* Administrators will now have the ability to specify a default option for how list type custom fields appear at the line item level. They can do this via the catalog template, 'Custom Field Management' in *Vroozi Catalog* or the 'Custom Field' configurations in the *Vroozi Purchase* administrator panel. The default will then automatically be selected, whenever the custom field is present on a line item in Vroozi Purchase.

Vroozi Catalog

From the *Custom Fields Management > Create Custom Field* select 'Drop Down List' Once Values are created (click the green **+** sign), select the 'Default Value' from the values created.

Vroozi Purchase

From *Document > Custom Fields* select a custom field to create or edit.

Click the arrow displayed to the right of the Custom Field selected of 'List' Type to create List options and select Default.

Enter List Values. Once completed select the Default Value at the top of the screen. Once selection has been entered. Click 'Submit'.

Vroozi Purchase (Administrator)
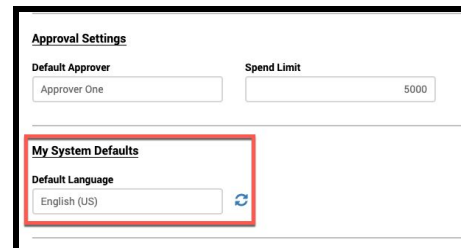
DECIMAL PLACE LOGIC ADDED TO CURRENCY SELECTION

Two new fields called "Min. Decimal Places" and "Max. Decimal Places" have been added to the 'Currencies' table found in *Master Data*. This configuration will dictate the decimal place precision displayed on amount fields pertaining to a specific currency.

This allows customers to define the decimal place set up for based on each currency. For example, a customer could configure 0 decimal places for JPY and 2 decimal places for USD.

CURRENCY LOCALIZATION APPLIED AT USER LANGUAGE SELECTION

Localization updates have been made to *All* amount fields on *All* transactional documents within Vroozi will display based on the language selection on each user's record within *Master Data*.
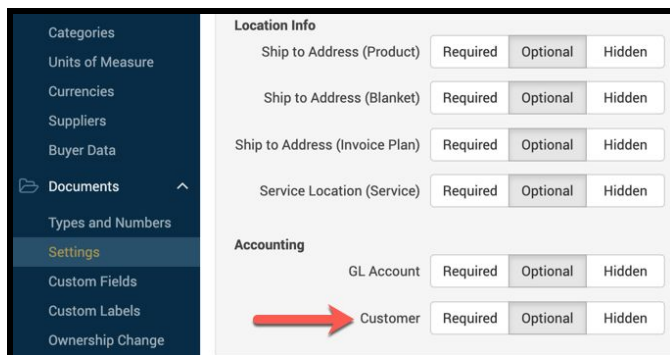
For example, when the 'Default Language' selected on a user's profile is 'English (US)', then all amounts will have ',' as thousand separator and '.' as the decimal separator – EUR 1000 will be displayed as 1,000.00 although the EUR standard is 1.000,00.

'CUSTOMER' ACCOUNT OBJECT IS NOW OPTIONAL

The 'Customers' accounting object will no longer be a mandatory field. Within *Document > Settings* the field can now be set to a 'Required', 'Optional' or 'Hidden' field on the requisition.

Vroozi Invoice (All Users)

ADDITIONAL 'TAX DISTRIBUTION' OPTION FOR VERTEX CUSTOMERS

For Vertex based tax calculations a new distribution has been introduced;

'Proportional to Estimated tax'. When selected, tax will be distributed (while maintaining decimal precision) based on the tax that is returned by the tax connector. This new default option will only be visible in the *Master Data > AP Settings* when the Vertex tax connector is on.

REFORMATTING OF INVOICE LINE ITEM INFORMATION

The invoice and memo line-item layout has been redesigned with line-item information distributed into two tabs; 'General Information' and 'Accounting'. The new design is intended to make keying in information easier for existing users and more intuitive for new users.

The split design is displayed when viewing and editing a line item. In either instance the view will default to the 'General Information' tab.

View Line Item: As previously performed, click on the line item 'Description' to view the details organized by 'General Information and 'Accounting. Click each tab to navigate from one to the next.

Edit Line item: Select 'Next' or click 'Accounting' to navigate there. Line item changes can be saved (check mark in bottom right corner) from either the 'General Information' or Accounting' view.

DISCOUNTS APPLIED ON CREDIT/DEBIT MEMOS

Discounts can now be represented on a Credit or Debit memo at both the Line Item and Header level.

As previously introduced on invoices Discount 'Percentage' or 'Value can be applied to line items.

Alternatively, 'Distribution Type' can be selected on the memo by clicking the calculator icon in the 'Calc. Discount' field. Distributions can be selected as follows; *Proportional to Subtotal, First line item, Equally between line items, Do not Distribute*. The default setting for discounts at the memo level will be *'Proportional to Subtotal.'*

Use Tax Editability

The Use tax field on Credit/Debit memos will now be editable. Within a line item, an AP Processor can edit the 'Use Tax' just as they would 'Price'.

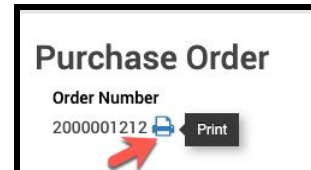Use Tax modifications will then be reflected in the Memo Header.

Vroozi Supplier Portal (Supplier Users)

PO CHANGE REPORT REDESIGN

The PO Change Report accessed via PDF at the 'Print' screen will now be divided into **2** sections; 'General Changes' and 'Line Item Changes'.

If there are no changes in any section, then a placeholder message stating that "There was no general change in PO" will appear.

Resolutions

INVOICE

✓ **Previously:** Invoices were not correctly routing to the Processors or Managers identified in a custom workflow.

Now: Invoices associated to a custom workflow will again correctly route to the defined AP Processors/Managers.

✓ **Previously:** The INVOICED status was not correctly being applied to invoices.

Now: A PO will now correctly transition to INVOICED status if all of its line-items have been invoiced and posted, even if there are additional invoice(s) being processed for that PO.

SUPPLIER PORTAL

✓ **Previously:** There was an error blocking successful upload of User Avatars within the Supplier User's profile of the Supplier Portal.

Now: Supplier Portal avatars can now be successfully uploaded in the Supplier Portal user's profile.

✓ **Previously:** Line item statuses were not appearing for POs entering the Vroozi System from an external system.

Now: Clients affected by this issue will now see line item statuses for applicable POs.

PURCHASE

✓ **Previously:** Delivery dates for a line item were being reset each time a user selected a supplier for the line item.

Now: Delivery dates will now remain static when or if a supplier is selected at the line item level.