

Buy Route

Where buyers can create purchase orders, convert Requisition line items into PO's, view PO statuses, resubmit failed PO's, and schedule the Purchase Order Activity report.

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Buy Route Configuration

Buy Route workflow should be enabled through the creation of Buying Groups.

Buy Route settings can be configured for Catalog and Non-catalog items. Client default is automatically set to route only non-Catalog Requisitions.

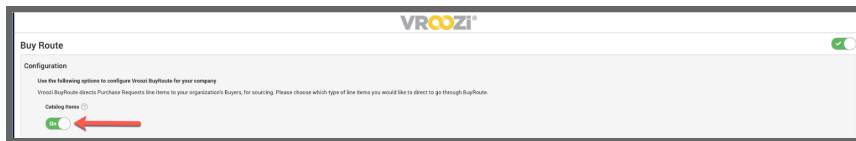
Vrooz Purchase Administrators can configure the behavior of the BuyRoute feature for their organization.

ENABLEMENT

If the Buy Route toggle is enabled, all administrators can enable Buy Route for all non-catalog items.

Buy Route -> Settings

To apply Buy Route to Catalog items, select the additional 'Catalog Items'



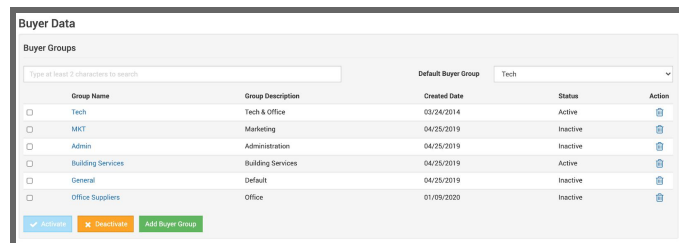
Once this toggle is enabled, all items included in PRs, whether they are catalog items, or free text items; will be sent into BuyRoute. Where a Buyer with access to the appropriate Buyer Group, will be able to see the items on their "Ready for Sourcing" screen upon logging into the system. From here, Buyers can review the items and add them to a PO.

BUYING GROUPS

A Buying Group identifies categories that require buyer assistance and specific buyers to provide that oversight.

You can use buying groups regardless of whether your organization is using BuyRoute.

Buyer Groups are configured and Managed from *Master Data -> Buyer Data*. (shown on right) For further details regarding Buyer Groups, see the [Administrator Guide](#).



Buyer Data					
Buyer Groups					
Type at least 2 characters to search			Default Buyer Group	Tech	
<input type="checkbox"/>	Tech	Tech & Office	03/24/2014	Active	
<input type="checkbox"/>	MKT	Marketing	04/25/2019	Inactive	
<input type="checkbox"/>	Admin	Administration	04/25/2019	Inactive	
<input type="checkbox"/>	Building Services	Building Services	04/25/2019	Active	
<input type="checkbox"/>	General	Default	04/25/2019	Inactive	
<input type="checkbox"/>	Office Suppliers	Office	01/09/2020	Inactive	

Buyer Group Creation:

Buy Route Workflow

CREATE ORDER

Buyers can bypass PR workflow and create a rush PO via Buy Route.

Note: Only users assigned to the 'Buyer' role will be able to create these types of direct purchase orders.

Step 1:

Login to Vroozzi using your buyer role credentials.

Step 2:

From the navigation panel on the left side of the screen, select the 'Create Order' option.

Step 3:

The 'Create Purchase Order' window will appear.

Create a Purchase Order Cancel

Please provide basic order information

Supplier **Order Type ***

Supplier Name *

Company Code *

Currency * **VAT Info**

- Fill in the required information fields:
 - Supplier Name
 - Order Type
 - Payment Terms
 - Order Name
 - FOB Terms (Optional)
 - Company Code
 - Currency

Step 4:

Click the green 'Continue' button to proceed with the order.

Create a Purchase Order
Supplier: SIGNS ALL SIGNS

Please provide basic order information

Supplier: SIGN004 - SIGNS ALL SIGNS

Order Type *: Standard

Payment Terms *: Net 60 Days

Order Name *: Billboard

FOB Terms:

Company Code *: 543213 - Marketing

Currency *: United States Dollar

VAT Info:

Continue >>

Step 5:

Click the blue 'Add Item' button to add line items to the order.

Create a Purchase Order
Supplier: PRECISION AUTO BODY & PAINT, INC.

Let's add some items to your order

#	Description	Category	Part No.	Delivery Date	Qty	UoM	Unit Price	Total Price	
No current line items.									
								Total (USD)	\$0.00

Add Item

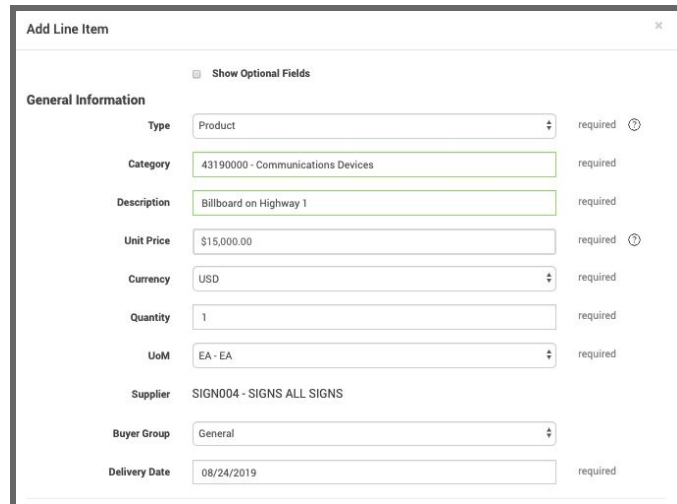
Back Continue

Step 6:

Fill in the required line item fields, same as you would to submit a free text or non-catalog purchase request.

1. **Type:** Select product or service)
2. **Category:** Choose from pre-existing categories. Use the drop down menu or search to select the category which best classifies the line item)

3. **Description:** Provide details that will help your Buyer understand the need.
4. **Unit price:** Cost per item or service
5. **Currency:** Select from currencies configured for your organization.
 - Currency will default to USD
6. **Quantity:** Enter desired amount.
7. **UoM:** Unit of measure
8. **Supplier:** Choose from pre-existing suppliers.
 - This field may not be required. In some cases it may be hidden. In these instances, complete as needed.
9. **Service Period or Delivery Date:** Selection depends on what 'Type' of item was identified in #1.



The screenshot shows the 'Add Line Item' form with the following fields and values:

Field	Value	Required
Type	Product	required
Category	43190000 - Communications Devices	required
Description	Billboard on Highway 1	required
Unit Price	\$15,000.00	required
Currency	USD	required
Quantity	1	required
UoM	EA - EA	required
Supplier	SIGN004 - SIGNS ALL SIGNS	
Buyer Group	General	
Delivery Date	08/24/2019	required

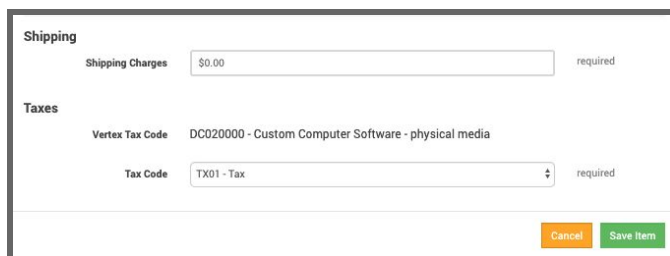
Step 7:

Enter the appropriate accounting information for the line item.

Step 8:

Enter the company information for the Purchasing Organization and Plant fields. Select the correct tax option from the drop down menu (i.e. taxable, tax exempt, etc.)

Note: Requirements will vary based on your organization's configurations.



The screenshot shows the 'Shipping' and 'Taxes' sections of the form:

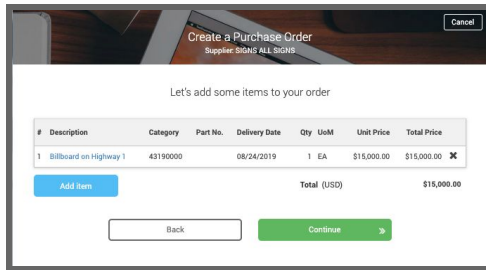
Section	Field	Value	Required
Shipping	Shipping Charges	\$0.00	required
	Taxes		
Taxes	Vertex Tax Code	DC020000 - Custom Computer Software - physical media	
	Tax Code	TX01 - Tax	required

Buttons: Cancel (orange), Save Item (green)

- Click the green 'Save Item' button to save the line item to the purchase order.

Step 9:

Repeat steps 5-8 as needed until all line items have been added to the purchase order. Click the green 'Continue' button to proceed once all line items have been added.

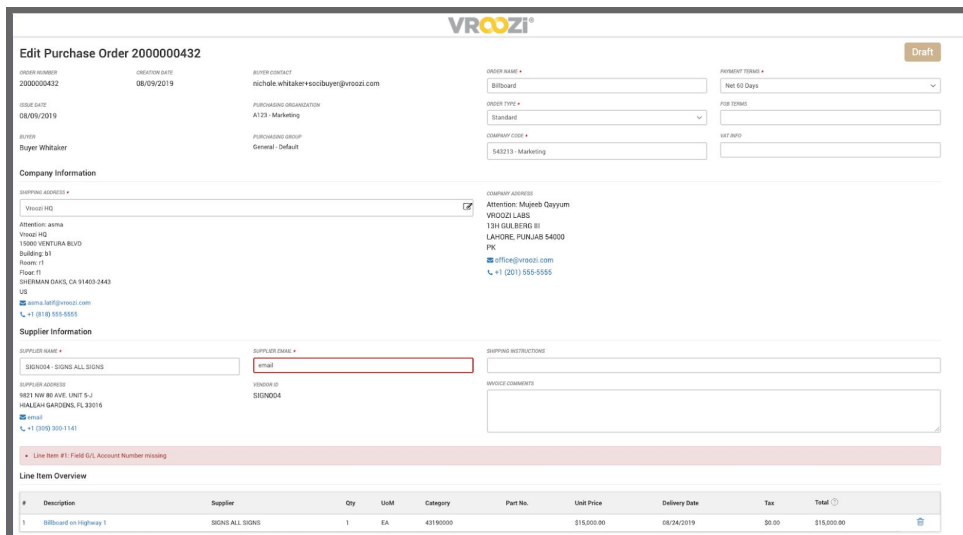


Step 10:

Click the shipping address field and select the appropriate address from the dropdown menu. Add any internal comments regarding the purchase order and any notes or instructions for the supplier into the appropriate fields.

Step 11:

Click the green 'Finish' button to create a draft of your purchase order. Review and verify all information entered into the purchase order is accurate. Add any shipping instructions if necessary.



Step 12:

Click the green 'Submit' button to send the Purchase Order to the supplier.

#	Description	Supplier	Qty	UoM	Category	Part No.	Unit Price	Delivery Date	Tax	Total	
1	Billboard on Highway 1	SIKAS ALL SIKAS	1	EA	4393000		\$15,000.00	08/24/2019	\$0.00	\$15,000.00	
										SUBTOTAL (USD)	\$15,000.00
										DISCOUNT (USD)	\$0.00
										TAX (USD)	\$0.00
										TOTAL (USD)	\$15,000.00

Step 13:

The Order can then be found in 'PO Status' under 'In Progress'. This status will remain until the Supplier confirms shipment of the item(s).

BUY ROUTE (PO STATUS)

Use the Tabs at the top of the Buy Route screen to view POs in various statuses of the procurement process. (shown on next page)

- **Drafts:** Not yet submitted to supplier
- **In Progress:** PO Data enroute to supplier
- **Ordered:** Supplier has PO and is process
- **Cancelled:** PO cancelled by internal user
- **Received:** Supplier has shipped the items and receipt has been verified via creation of a Goods Receipt. A PO will not move into this status until ALL items have been received via the Goods Receipt completion. POs not requiring a Goods Receipt will automatically move here.
- **Invoiced:** Invoice processed.

Buy Route Draft Purchase Orders						
	Drafts	InProgress	Ordered	Cancelled	Received	Invoiced
PO #	Creation Date	Amount	Supplier	Request #	Requester Name	
2000004109	09/11/2018	\$5,454.00	#HHHHHHHHHH	1000006403	Notify Vrooz	
2000004108	09/11/2018	\$100.00	#H11-TTTTTT	1000007474	Notify Vrooz	
2000004093	09/07/2018	\$1,250.00	S_2410	1000007411	azmaar jamil	
2000004090	09/07/2018	\$1,999.00	1st choice	1000007444	Abdullah Buyer	
2000004052	08/27/2018	\$100.00	#H12	1000007288	Abdullah Buyer	
2000004002	08/13/2018	\$35.00	M-Supplier-Email	1000007257	buyer user	
2000003937	07/09/2018	\$64.00	M-Supplier-Email	1000007146	buyer user	
2000003934	07/06/2018	\$31.00	June_Supplier	1000007139	buyer user	
2000003933	07/06/2018	\$100.00	June_Supplier	1000007138	Buyer User	
2000003932	07/06/2018	\$400.00	Post_0604Supplier	1000007104	buyer user	

PO PROCESSING STATUS

Repository for any Purchase Orders that have failed in the order process. You can click the number to view and review what changes need to be made. The Vroozi support team is notified if a PO fails and will reach out with details.



Quantity	PO #	Supplier	Message Log	Status	Actions
10000000233	10000000233	Supplier Name		Processing	View
10000000233	10000000233	Supplier Name		Processing	View

BUY ROUTE NOTIFICATIONS

Buyers:

Will receive email notification when a PR requires Buy Route review. Selecting 'View Purchase Request' will navigate the Buyer to the specific PR within Vroozi.

Purchase Request **1000000233**
is ready for sourcing

04/08/19 <small>REQUESTED DELIVERY</small>	1 <small>ITEMS</small>	\$1,099.00 <small>TOTAL</small>
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View Purchase Request


Requesters:

Will receive email notification as the PR progresses through the Buy Route flow:

1. The Requisition review is complete
2. The PR has converted to a Purchase Order. (shown below)
 - Select View Purchase Order to see if any changes have been made.

Purchase Order 2000000088 was generated and sent to **B & H PHOTO - VIDEO, INC.**

04/08/19	1	\$1,099.00
<small>DELIVERY DATE</small>	<small>ITEMS</small>	<small>TOTAL</small>

[View Purchase Order](#) 

3. The PO has been submitted to the Supplier.

Your Purchase Order has been submitted to **B & H PHOTO - VIDEO, INC.**

04/08/19	1	\$1,099.00
<small>DELIVERY DATE</small>	<small>ITEMS</small>	<small>TOTAL</small>

[View Purchase Order](#)