

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.

Vroozi 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'

VROZI	
Buy Route	
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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 <u>Administrator Guide</u>.

Buyer	Data				
Buyer (Groups				
			Default Buyer Group	Tech	×
	Group Name	Group Description	Created Date	Status	Action
0	Tech	Tech & Office	03/24/2014	Active	
	MKT	Marketing	04/25/2019	Inactive	
0	Admin	Administration	04/25/2019	Inactive	
	Building Services	Building Services	04/25/2019	Active	
0	General	Default	04/25/2019	Inactive	<u> </u>
	Office Suppliers	Office	01/09/2020	Inactive	(
✓ A0	ilvate 🗙 Deactivate Add Buyer Group				

Buyer Group Creation:



Group Name	П	required
Group Description	Buying for all IT equipment	required
Associated	7P0UKM HWG028 × 180585 WW4384 ×	
Buyer(s)	1WBDJH UNCNSM ×	
Product	43190000 - Communications Devices ×	
Categories	43210000 - Computer Equipment 🗵	
	43211500 - Computers and Servers 🗵	
	43211600 - Computer accessories ×	
Vendor(s)	Office Depot - Office Depot 🚿	
	106067 - CENTRAL OFFICE EQUIPMENT 🗵	
	123785 - OFFICE INNOVATIONS INC	
	132111 - DONT PANIC OFFICE SYSTEMS ×	

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.

<u>Step 1:</u>

Login to Vroozi using your buyer role credentials.

<u>Step 2:</u>

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

<u>Step 3:</u>

The 'Create Purchase Order' window will appear.



Please provide ba	asic order information
Supplier	Order Type *
Click to select value	Standard ~
PITCODI - PIT CREW 18911 REDRIVER TRAIL SAN ANTONIO, TX 1 PITNODI - PITNEY BOWES GLOBAL FINANCIAL SERVICE PO BOX 371887 PITTSBURGH, PA 1 PITNO2 - PURCHASE POWER **ACH** PO BOX 371847 PITTSBURGH, PA	43213 - Marketing
Currency *	VAT Info
United States Dollar 🗸 🗸	
c	ontinue

- Fill in the required information fields:
 - Supplier Name
 - Order Type
 - Payment Terms
 - o Order Name

- FOB Terms (Optional)
- Company Code
- Currency



<u>Step 4:</u>

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

Please p	rovide bas	ic order information
Supplier		Order Type *
SIGN004 - SIGNS ALL SIGNS		Standard V
Payment Terms *		Order Name *
Net 60 Days	~	Billboard
FOB Terms		Company Code *
		543213 - Marketing
Currency *		VAT Info
United States Dollar	~	

<u>Step 5:</u>

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

to your order Qty UoM Unit Price ems.	Total Price
	Total Price
ems.	
Total (USD)	\$0.00
Continue	

<u>Step 6:</u>

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
- Add Line Item Show Optional Fields **General Information** * required ⑦ Type Product Category 43190000 - Communications Devices required Description Billboard on Highway 1 required \$15,000.00 required ⑦ USD required Currency 1 required Quantity EA - EA required UoM SIGN004 - SIGNS ALL SIGNS Supplier General ¢ Buver Group Delivery Date 08/24/2019 required
- 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.

<u>Step 7:</u>

Enter the appropriate accounting information for the line item.

<u>Step 8:</u>

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.

Shipping s	hipping Charges	\$0.00		required
Taxes	Vertex Tax Code	DC020000 - Custom Computer Software - physical media		
	Tax Code	TX01 - Tax	\$	required
			Ca	ncel Save Item

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



<u>Step 9:</u>

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.

			Supplie	R SIGNS ALL SIGN	IS		
		Let's	s add sor	ne items to y	our order		
	Description	Category	Part No.	Delivery Date	Qty UoM	Unit Price	Total Price
1	Billboard on Highway 1	43190000		08/24/2019	1 EA	\$15,000.00	\$15,000.00 🗙
	Add item				Total (USD)		\$15,000.00
		Back			Continue		

<u>Step 10:</u>

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.

					V	R	∾Zi°							
Edit Purchase Order	2000000432												Draft	
ORDER NUMBER	CREATION DATE	BUYER CONTACT					OADER NAME •			PROMENT TERM	s •			
2000000432	08/09/2019	nichole.whitaker+socibuye	r@vroozi.ci	m			Billboard			Net 60 Days	5		~	
1550E 047E		PURCHASING ORGANIZATION					ORDER TYPE .			FOB TERMS				
08/09/2019		A123 - Marketing					Standard		~					
BUYER		PURCHASING GROUP					COMPANY CODE .			WE MED				
Buyer Whitaker		General - Default					543213 - Marketing							
Company Information														
SHIPPOND ADDRESS +							COMPANY ADDRESS							
Vroazi HQ					G		Attention: Mujeeb Qayyun VROOZI LABS	n						
Attention: asma Vroozi HQ							13H GULBERG III							
15000 VENTURA BLVD							LAHORE, PUNJAB 54000 PK							
Building: b1 Room: r1							a office@vroozi.com							
Floar fl SHERMAN DAKS, CA 91403-2443							C +1 (201) 555-5555							
US														
asma.latif@vroozi.com														
C +1 (818) 555-5555														
Supplier Information														
SUPPLIER NAME •		SUPPLIER EMAIL .				_	SHIPPING INSTRUCTIONS							
SIGN004 - SIGNS ALL SIGNS		email												
SUPPLIER ADDRESS		VENDOR ID					INVOICE COMMENTS							
9821 NW 80 AVE, UNIT 5-J HIALEAH GARDENS, FL 33016		SIGN004												
a email														
+1 (305) 300-1141													10	
Line Item #1: Field G/L Account Nu	mbar miseinn													
	and a money													
Line Item Overview														
# Description	Supplier		Qty	UoM	Category		Part No.	Unit Price	Delivery Date		Tax	Total 🛞		
1 Billboard on Highway 1	SIGNS ALL	SIGNS	1	EA	43190000			\$15,000.00	08/24/2019		\$0.00	\$15,000.00	ŧ	

<u>Step 12:</u>

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



Description	Supplier	Qty	UoM	Category	Part No.	Unit Price	Delivery Date	Так	Total ①	
Billboard on Highway 1	SIGNS ALL SIGNS	1	EA	43190300		\$15,000.00	08/24/2019	\$0.00	\$15,000.00	8
Add item										
									SURFORM (USC)	\$15,000.00
									SHIPPING CHARGES (USD)	\$0.00
									TAX (USD)	\$0.00
									TOTAL (USD)	\$15,000.00
IOTES FOR SUPPLIER					TERMS & CONDITIONS					
				ß	contemporaneous agreeme this Agreement shall be effe be asserted. However, to the Order Form, the terms of su-	nts, proposals or representation ctive unless in writing and eith extent of any conflict or inco- ch exhibit, addendum or Order r order documentation (exclud	and all Order Forms, constitutes ns, written or oral, concerning its ser signed or accepted electronics isistency between the provisions. Form shall prevail. Notwithstandi ing Order Forms) shall be incorpo	subject matter. No i ally by the party aga in the body of this J ing any language to	modification, amendment, or wa inst whom the modification, arr sgreement and any exhibit or ad the contrary therein, no terms o	iver of any provision of endment or waiver is to idendum hereto or any r conditions stated in
					conditions shall be null and	volu viouzi, mu.				

<u>Step 13:</u>

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

	Drafts	InProgress	Ordered	Canceled	Received	Invoiced
1	P0 #	Creation Date	Amount	Supplier	Request #	Requester Name
A ¹	2000004109	09/11/2018	\$5,454.00	#НННННННН	1000006403	Notify Vroozi
A	2000004108	09/11/2018	\$100.00	#H11-Ttttttttt	1000007474	Notify Vroozi
ø	2000004093	09/07/2018	\$1,250.00	S_2410	1000007411	azmaar jamil
A	2000004090	09/07/2018	\$1,999.00	1st choice	1000007444	Abdullah Buyer
ø	2000004052	08/27/2018	\$100.00	#H12	1000007288	Abdullah Buyer
1	2000004002	08/13/2018	\$35.00	M-Supplier-Email	1000007257	buyer user
ø	2000003937	07/09/2018	\$64.00	M-Supplier-Email	1000007146	buyer user
A	2000003934	07/06/2018	\$31.00	June_Supplier	1000007139	buyer user
ø	2000003933	07/06/2018	\$100.00	June_Supplier	1000007138	Buyer User
	2000003932	07/06/2018	\$400.00	Post_0604Supplier	1000007104	buyer 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.



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.

			Purchase Order Pro		
				Startis S PAR Namina Net 1 16 YO APPEN	13
Grands of D. Stresson, S.	os la mue l'est	n Esperat			
Seize 🖓	P37 ()	Realiz C	Meangeling 2	Balan () Anders	
and the second	200000112	First days		records.	
and the bound	200000120	Figure Lines		rectorage -	
1242					

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.

	Request 10 ady for sour	
04/08/19 REQUESTED DELIVERY	1 ITEMS	\$1,099.00 TOTAL
Viev	w Purchase Req	uest

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.





3. The PO has been submitted to the Supplier.

