Release Notes

July 2020

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Indicates a significant enhancement to the user interface.

Vroozi Purchase (Administrator)

OPTIONAL OR REQUIRED CUSTOM FIELDS

Custom fields can be classified as "Required" for specific suppliers and/or categories. By default Custom fields are set to optional. This criteria will then be applied to all documents Requisition through Invoice.

Once 'Required' is toggled on (shown on right) administrators can select specific suppliers, categories or a combination of both to set the custom field requirement against. Multiple entries are allowed per field.

Type into the field to select from pre-existing suppliers or categories.

Supplier and Categories tied to the specific custom field requirement:

In the example shown above the custom field 'Capacity' will only be required for line items associated with Grainger (supplier) and/or any line items categorized as *Petroleum machinery* or *Hydraulic machinery*.

CUSTOM FIELD BULK UPLOAD

The introduction of *bulk upload* capabilities will now make custom field maintenance easier. The upload/download options are located in the top right corner of the 'Custom Fields' view.

Documents -> Custom Fields

To get started using Custom Fields click the cloud icon to download the Custom Field Template. (shown on right)

Buying Organizations already using custom fields can click the middle downward facing arrow (shown below)to Export their current list of custom fields.

To upload your populated template, select the upward facing arrow (shown on right)
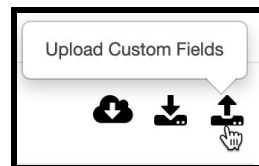
Tip! *An uploaded file will overwrite any existing Custom Field information.*

OPTIONAL SUPPLIER SELECTION

Customers now have the ability to remove the *Supplier* selection requirement at the line item level on a Requisition. This can be accomplished through the new line item configuration which allows the 'Supplier' field to be defined as "Required', "Optional" or "Hidden" for both Catalog and Non-Catalog line items. (shown on next page)

Line Item Field Configuration

General Information

Field	Options
Part No.	Required · **Optional** · Hidden
Service Part No.	Required · **Optional** · Hidden
Price Unit	Required · **Optional** · Hidden
Manufacturer Part No.	Required · Optional · **Hidden**
Manufacturer Name	Required · Optional · **Hidden**
Brand Name	Required · Optional · **Hidden**
Quote Number	Required · **Optional** · Hidden
Ref Web URL	Required · **Optional** · Hidden

Shipping

Field	Options
Shipping Charges	Required · **Optional** · Hidden

Supplier ⑦

Field	Options
Catalog Item	Required · Optional · **Hidden**
Non-Catalog Item	**Required** · Optional · Hidden

Requisition view with missing error message for an item with the Supplier information set to 'Required'.

By setting the Supplier field to "Optional" or "Hidden", the responsibility of selecting a supplier can be removed from the Requester and instead directed to the post Requisition submission workflow via Sourcing Approval or Buy Route. The next two sections walk through these workflows.

Supplier Selection at Sourcing Review

To initiate Sourcing Approver completion of the Supplier field, Sourcing Rules must match the line item configurations. Example shown below demonstrates a sourcing rule designed to flow all catalog requests to Sourcing Approvers.

Tip! *Create your Sourcing Approvers before creating your Sourcing Rules. See our Sourcing Review materials for further details.*

Company ->Workflow ->Sourcing Workflow

Supplier Selection at Buy Route

Similar to the enablement of supplier selection during Sourcing review, to enable Supplier Selection at the Buyer level, customers should set the Supplier line item requirement for Catalog Items as 'Hidden' or 'Optional'.

Tip! *Be sure Buy Route has been properly configured and Buyers have been defined at the User level. See the [Buy Route Guide](#) for further details.*

Buy Route -> Settings

## IDENTIFY MULTIPLE cXML TRANSMISSIONS

The Vroozi system will now recognize and define multiple inbound (memos, invoices and PO acknowledgements) and outbound (POs) cXML transmissions from a single supplier. This new functionality enables the Vroozi Supplier team or experienced customers or to set up a supplier's cXML transmissions.

New and existing supplier cXML credentials and configurations are stored in one location within the Administrator navigation panel. (shown on right)

Documents -> cXML Setup

This new design gives experienced Content Managers the ability to update or add new credentials for a supplier.
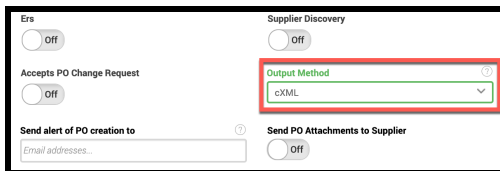
Click 'View' (shown on previous page) to edit or view credentials for the supplier listed in that row.

Upon opening existing or new cXML credentials (via 'add cXML Settings') the configurations are organized into 2 tabs; 'Incoming cXML Document' and Outgoing 'cXML Document'. The next 2 sections explain the data contained in these configurations.
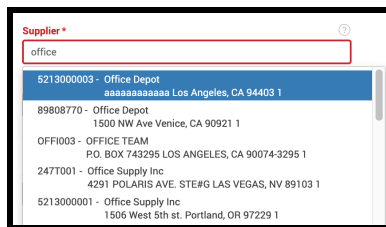
Incoming cXML Documents

Tip! *If creating credentials for a* <u>new supplier</u> *you must select the 'Output Method' on the supplier record as 'cXML'. (shown below)*
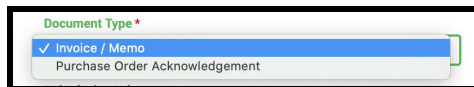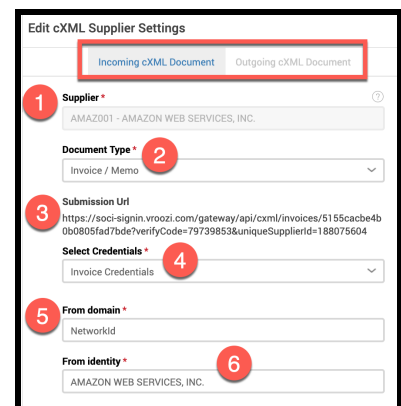
Master Data -> Suppliers

1. **Supplier:** The supplier will not be editable for an existing record. New records can select a Supplier from their repository of existing suppliers.

2. **Document Type:** Incoming Documents can be selected as either 'Invoice/Memo' or 'Purchase Order Acknowledgement'.

3. **Submission URL:** This field will auto-populate once the user selects the Output method as cXML or turns on the Invoice Receipt toggle.

4. **Select Credentials:** Existing Records will list previously created credentials whereas a new record at point of creation will only have the option to select 'New'.

5. **From Domain:** This information should be requested from and provided by the Supplier

6. **From Identity:** Supplier Provided

7. **To Domain:** This information should be requested from and provided by the Supplier

8. **To Identity:** Vroozi,Inc

9. **Sender Domain:** Auto created for default credentials and can also be user provided or updated

10. **Sender Identity:** Auto created for default credentials can also be user provided

11. **Shared Secret:** Auto created for default credentials can also be user provided

12. Save

13. Any cXML credentials already associated with the Supplier will be viewable below Cancel/Save.

Outgoing cXML Documents

1. **Supplier:** The supplier will not be editable for an existing record. New records can select a Supplier from your repository of existing suppliers.
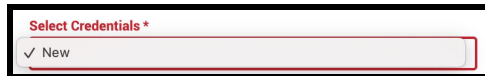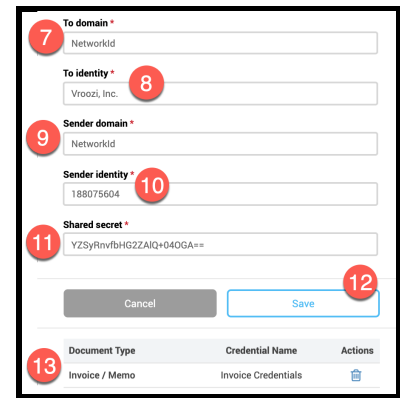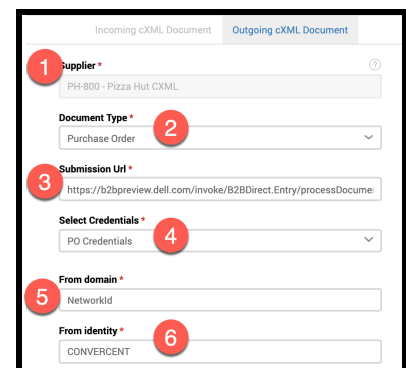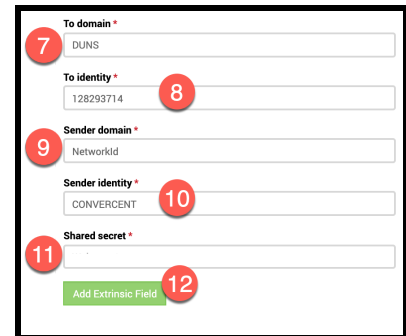

2. **Document Type:** Currently only 'Purchase Order' can be selected for this field.

3. **Submission Url:** This information should be requested from and provided by the Supplier.

4. **Select Credentials:** Supplier Provided

5. **From Domain:** Supplier Provided

6. **From Identity:** Supplier Provided

7. **To Domain:** This information should be requested from and provided by the Supplier

8. **To Identity:** Supplier Provided

9. **Sender Domain:** Supplier Provided

10. **Sender Identity:** Supplier Provided

11. **Shared Secret:** Supplier Provided

12. **Add Extrinsic Field:** Information not included in standard cXML transmission. Ex: Custom Fields that are required by the supplier.

Like the 'Outgoing cXML Documents' tab any pre-existing transmission configurations for the selected supplier will be listed below the Cancel/Save buttons.

DOWNLOADABLE CXML TEMPLATES

In support of the new self-service cXML management noted above, sample cXML transmissions are now available for download from the *cXML Setup* sub-category.

Here, you can download sample Invoice, Memo and PO Acknowledgements. Click any of the templates to open the template in a new window or tab. From this view, save the file and share with suppliers as needed.

Continued on the next page.

Partial view of the cXML Memo (credit) Template:

Vroozi Purchase (Requester)

PRODUCT DESCRIPTION NOW INCLUSIVE OF THE MATERIAL NUMBER

SAP customers will now see a catalog item's *Material Number* displayed in the product details screen.

While the Material Number was already represented in the internal catalog template (NEW_ITEM-MATNR) it was not yet visible on the product details. If populated in the template this information will now be displayed in the product details screen.

Vroozi Purchase Express (Shopper)

UPDATED POWER SHOPPER SELECTION

The Power Shopper selection has been moved to the last stage of the Requisition process. By pulling the applicable Power Shoppers at the end of the process,

the Vroozi system can correctly evaluate all defined Power Shopper mapping rules. The new workflow avoids the potential for Power Shopper selection on the Requisition before additional changes are made and then resultantly the list of Power Shoppers changes.

Customers familiar with Power Shopper mapping rules are aware that changes to Categories, Cost Centers, Company Code etc, may change the Power Shopper(s) responsible for the Requisition.

Previous Workflow:

The Shopper selected a Power Shopper **before** clicking 'Submit'. After selection of the Power Shopper, the Shopper could make changes possibly impacting the Power Shopper options but without the ability to flag any changes that impacted Power Shopper selection.

New Workflow:

The Shopper will select a Power Shopper **after** clicking *'Submit'*.

After clicking 'Submit' and the Requisition is finalized, Shoppers are prompted to select from the applicable list of Power Shoppers.
(shown on right)

Vroozi Invoice (All)

GL ACCOUNT CONSOLIDATION

The invoice and credit memo line-item view has been enhanced to only display unique GL Accounts in the line-item. If more than two (2) GL accounts are distributed for a single line item, only the first GL Account will be displayed along with a +sign showing how many GL accounts this line item is split into.

At the line item view, additional GL accounts are noted. Hover over the "+…" for a quick preview of the additional GL accounts. The example below displays a +3, indicating 4 GL accounts split across the line item. (shown above)
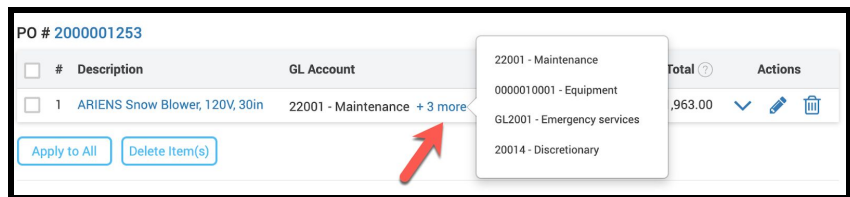
Within the line item details, click 'Accounting' to view further details of the GL accounts distribution. (shown below)
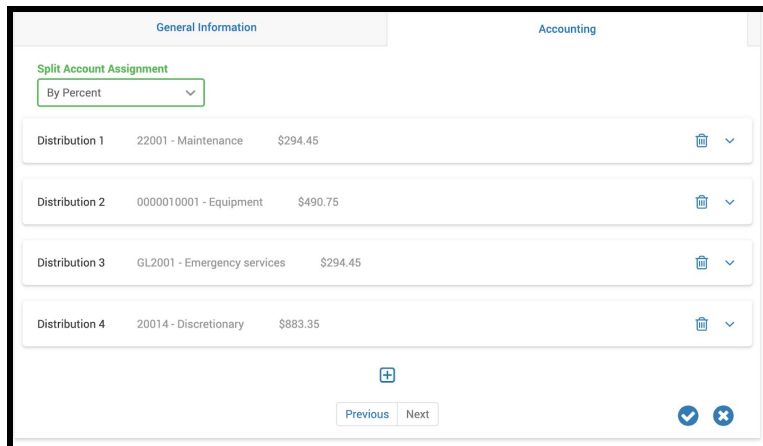
Vroozi Supplier Portal (Supplier Users)

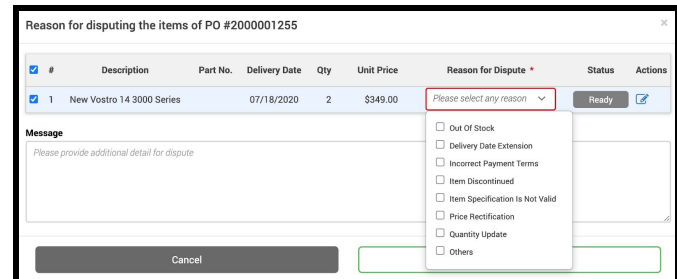## SELECTION OF MULTIPLE DISPUTE REASONS

The Dispute feature now allows for the selection of multiple reasons for disputing a single line item.
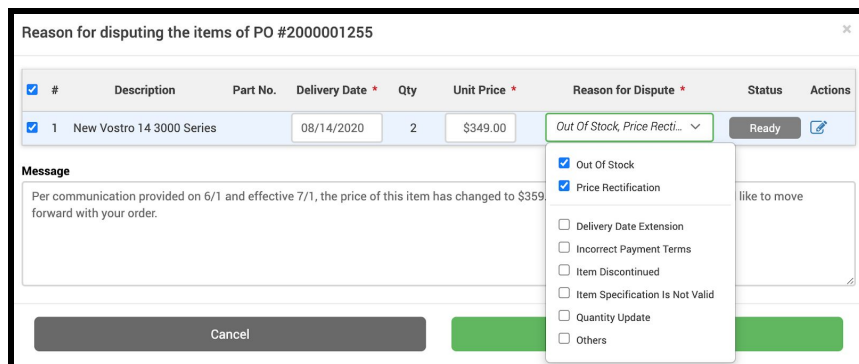
As previously performed when electing to 'Dispute' a line item(s), users will select the 'Reason'. Each time a reason is selected, it will move to the top of the list.

Additional 'Reasons for Dispute' may be selected and will continue to move to the top of the list. (shown on right)

As per previous functionality if 'Out of Stock' or 'Delivery Date Extension' is selected, users will be prompted to select an updated Delivery Date.

Once all Dispute reasons are selected and if applicable the 'Delivery Date' is updated, the remaining steps of the Dispute process remain the same. Once submitted the Requester/Buyer will receive an email notifying them an item(s) has been disputed. (shown below)
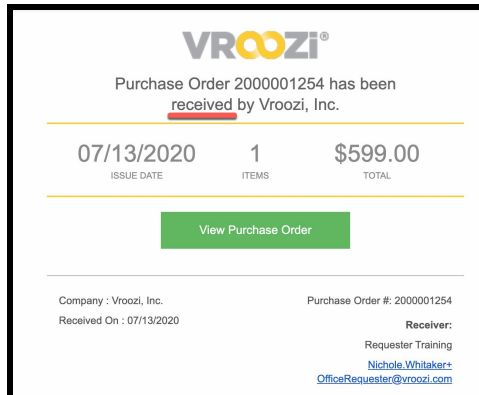

All Dispute Reasons will be viewable in the PO by both the supplier and Requester.

Buyer Receipt Notification

To increase Supplier awareness around the receipt of shipped goods, Supplier Portal users will now receive an email notification when a Goods Receipt is created against their PO.

This supports current functionality that pushes the 'PO Status' from "Shipped" to "Received" when a buying organization creates a goods receipt against the applicable PO.
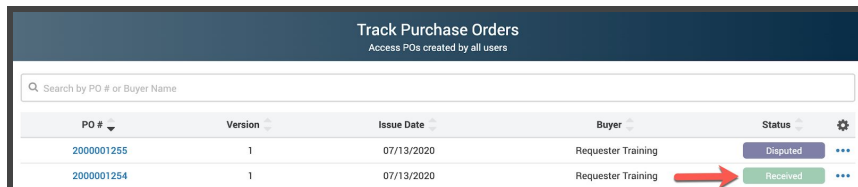
Resolutions

Performance issues that impacted multiple customers.

INVOICE

✓ **Previously:** When printing an invoice some Accounting information pertinent to the line item was missing.

   Now: All Accounting information pertinent to the line-item should be displayed appropriately in the printed copy of the document.

✓ **Previously:** Users were unable to open and view paid invoices from the 'Paid Invoice' status view.

   Now: All applicable invoices can be opened and viewed from the 'Paid Invoice' view.

SUPPLIER PORTAL

✓ **Previously:** An issue prevented Supplier Portal users from confirming a line item in a *Partially Disputed* PO.

   Now: Supplier Portal users will again have the ability to confirm a line item in a *Disputed* or *Partially Disputed* PO. that had originally been disputed.

✓ **Previously:** When a POCR was performed against a PO line item, changes performed outside of the POCR were also being captured in the audit trail.

   Now: Only the changes made during a POCR will be visible in the PO audit trail.