

Release Notes

July 2020

Table of Contents:

Vroozi Purchase (Administrator)	2
Optional or Required Custom Fields Custom Field Bulk Upload Optional Supplier Selection Supplier Selection at Sourcing Review Supplier Selection at Buy Route Identify Multiple cXML transmissions Incoming cXML Documents Outgoing cXML Documents Downloadable cXML Templates	2 3 4 5 5 6 7 8
Vroozi Purchase (Requester)	9
Product Description Now Inclusive of the Material Number	9
Vroozi Purchase Express (Shopper)	9
Updated Power Shopper Selection	9
Vroozi Invoice (All)	11
GL Account consolidation	11
Vroozi Supplier Portal (Supplier Users)	12
Selection of Multiple Dispute Reasons Buyer Receipt Notification	12 13
Resolutions	14
Invoice Supplier Portal	14 14



Indicates a significant enhancement to the user interface.



Vroozi Purchase (Administrator)

OPTIONAL OR **R**EQUIRED **C**USTOM 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:

Required ⑦ On	Post Filter ⑦ Off
Searchable ⑦	Include in PO? ⑦
Off	Off
Required for the following Suppliers: Grainger - Grainger ×	(2)
Required for the following Categories:	?
23110000 - Petroleum machinery × 27	20000 - Hydraulic machinery 🛪

Edit a Custom Fie	ld	×
Field Name *		
Capacity		
Display Name		
Capacity		
Type *		?
List		\sim \rightarrow
Placeholder Text		(?
Required ⑦ On	Post Filter ⑦ Off	
Searchable ⑦	Include in PO? ⑦	
Off	Off	
Required for the following Sup	opliers:	
Specify suppliers to be included	in the rule	
Required for the following Cate	egories:	
Specify categories to be include	d in the rule	

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.

Release Notes July 2020 3

Documents -> Custom Fields

Custom Fields

Export Custom Fields

^

	A ocaion by rich hanne, Display Hume, Type, otacido and oracled bate				
		Field Name	Display Name	Туре	Created Date
		Billing Contact Name	Billing Contact Name	Fixed	10/08/2019
		Billing Contact Phone Num	Billing Contact Phone Num	Fixed	10/08/2019
To get s downlo	start bad t	ed using Custom he Custom Field 1	Fields click the clo emplate. (shown c	ud icon to 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

1

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)



0 1 1

Action

圃



Status

Active

Active







Line Item Field Configurat	ion		
General Information			
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			
Shipping Charges	Required	Optional	Hidden
Supplier ⑦			
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'.

• Lir	ie Item	#1: Field 'recommended supplier' missing or empty									
		Description	Supplier	Part No.	Category	Del. Date	Qty	UoM	Unit Price	Total 💮	Action
	1	Computer			52160000	07/23/2020	1	EA	\$479.00	\$479.00	0 20
	2	Inspiron 15 5000 Series Laptop Available with Touch Screen	Office Supply Inc	2609033	48100000	07/13/2020	1	EA	\$599.00	\$599.00	8 C1 %
	Add	Line Item Add Attachments Apply to All									

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 <u>Sourcing Review</u> materials for further details.



Company ->Workflow ->Sourcing Workflow

Sourcing Wor	I Rules					
Enter you	ur search terms					
	Catalog Item	Product Type	Amount	Created Date	Status	Action
	Catalog	Product	\$1.00	12/20/2019	Active	Ŵ

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 <u>Buy Route Guide</u> for further details.

Buy Route
Configuration
Use the following options to configure Vroozi BuyRoute for your company
Vroozi BuyRoute directs Purchase Requests line items to your organization's Buyers, for sourcing. Please choose which type of line items you would like to direct to go through BuyRoute.
Catalog Items 🕥
Qr O

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.

) Administrator 🗸 🗸	VROOZI°				
Payment Terms Categories	cXML Setup				~
Units of Measure Currencies	Supplier cXML Configurations				
Suppliers Buyer Data	Q Type at least 2 characters to search for a supplie	er cXML Settings			
Documents ^	Supplier ID	Company Name	cXML Credentials	Last Updated Date	Actions
Types and Numbers	AMAZ001	AMAZON WEB SERVICES, INC.	View	06/25/2020	Û
Settings	SUPPLIERID	MSC Direct	View	06/25/2020	1
eXML Setup	Maggi	Magnus	View	06/25/2020	Ê
Custom Labels	247T001	Office Supply Inc	View	06/25/2020	ê
Ownership Change	PH-800	Pizza Hut CXML	View	06/25/2020	Ê
Accounts Payable 🗸	1001	Sam API Supplier 1001	View	06/25/2020	Ē
Supplier Partal	DefaultVendor-S8312	Suppiler-8312	View	06/25/2020	
	ahmed.habib724	ahmed.habib724	View	06/25/2020	1
reports	1-8 of 8				
Document Flow	Add aVMI Cattings				
Approve Requests	ADD CAME Settings				
	Download cXML Invoice Sample	Download cXML Memo Sample			



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'.



	Incoming cXML Document	Outgoing cXML Document	J
Supp	lier *		_
AN	IAZ001 - AMAZON WEB SERVICE	S, INC.	
Docu	iment Type *		
Inv	oice / Memo		,
Subr https 0b08 Sele	nission Url ://soci-signin.vroozi.com/gatew 05fad7bde?verifyCode=7973985 ct Credentials *	ay/api/cxml/invoices/5155cac 3&uniqueSupplier1d=1880756/	cbe 04
Subr https 0b08 Selec	nission Url s://soci-signin.vroozi.com/gatew 05fad7bde?verifyCode=797398 ct Credentials * oice Credentials	ay/api/cxml/invoices/5155caa 3&uniqueSupplierId=1880756	cbe 04
Subr https 0b08 Selec	nission Url :://soci-signin.vroozi.com/gatew 05fad7bde?verifyCode=797398 ct Credentials * oice Credentials	ay/api/cxml/invoices/5155caa 3&uniqueSupplierId=1880756	cbe 04
Subr https 0b08 Select Inv	nission Url :://soci-signin.vroozi.com/gatewa Clofad7bde7verftyCode=7973982 ct Gredentials * oice Credentials * domain *	ay/api/cxml/invoices/5155caa 38.uniqueSuppliertd=1880756	cbe 04
Subr https 0b08 Seler Inv From	nission Url ://soci-signin.vroozi.com/gatew 05fad7bder?verifyCode=7973988 ct Credentials * oice Credentials domain * tworkid	ay/api/cxml/invoices/5155caa 38.uniqueSuppliertd=1880756	cbe 04
Subr https 0b08 Selec Inv From Ne	nission Url ://soci-signin.vroozi.com/gatew. 05/ad7bed?verifyCode=7973988 et Credentials * oice Credentials * et oreania * tworkld i dentity *	ay/api/cxml/invoices/5155ca 38uniqueSupplierid=1880756	cbe 04

- 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'.



Select Credentials *	
√ 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

Incoming cXML Document	Outgoing cXML Document
upplier *	
PH-800 - Pizza Hut CXML	
Document Type *	
Purchase Order	~
Submission Url *	
https://b2bpreview.dell.com/invoke/	B2BDirect.Entry/processDocume
Select Credentials *	

CONVERCENT

	To domain *		
\checkmark	NetworkId		
	To identity*		
9	Sender domain *		
	Sender identity *		
a	Shared secret * YZSyRnvfbHG2ZAIQ+040GA==		
	Cancel	Save	12
	Document Type	Credential Name	Actions
13	Invoice / Memo	Invoice Credentials	Ê



- 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.

To domain *	
7 DUNS	
To identity *	
128293714	8
Sender domain *	
Networkld	
Sender identity *	
CONVERCENT	10
Shared secret *	
Add Extrinsic Fi	ield (12)

×	
^	

Add Products Pield

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:

//2020	vroozi-test-cxml.s3.amazonaws.com/sample-memo-cxml.xml
This XML file does below.	not appear to have any style information associated with it. The document tree is shown
<cxml version="<br">05:00"></cxml>	1.2.025" payloadID="Sam.2.1000l@vroozi.com" timestamp="2019-11-25T02:50:33-
<header></header>	
<from></from>	
<credentia< td=""><td>1 domain="NetworkId"></td></credentia<>	1 domain="NetworkId">
<identit< td=""><td>y>Sam Supplier</td></identit<>	y>Sam Supplier
<td>al></td>	al>
<to></to>	
<credentia< td=""><td>1 domain="NetworkId"></td></credentia<>	1 domain="NetworkId">
<identit< td=""><td>y>Vroozi Validation</td></identit<>	y>Vroozi Validation
<td>al></td>	al>
<sender></sender>	
<credentia< td=""><td>1 domain="NetworkId"></td></credentia<>	1 domain="NetworkId">
<identit< td=""><td>y>539608769</td></identit<>	y>539608769
<shareds< td=""><td>ecret>********</td></shareds<>	ecret>********
<td>al></td>	al>
<useragent< td=""><td><pre>>Supplier User Agent</pre></td></useragent<>	<pre>>Supplier User Agent</pre>
<request depl<="" td=""><td>oymentMode="production"></td></request>	oymentMode="production">
<invoicedet< td=""><td>ailRequest></td></invoicedet<>	ailRequest>
<invoicede< td=""><td>tailRequestHeader invoiceID="Sam-100001" invoiceOrigin="supplier"</td></invoicede<>	tailRequestHeader invoiceID="Sam-100001" invoiceOrigin="supplier"
<pre>purpose=": <invoice< pre=""></invoice<></pre>	<pre>ineLevelCreditMemo" operation="new" invoiceDate="2019-11-25T02:50:33-05:00"> DetailHeaderIndicator/></pre>
<invoice< td=""><td>DetailLineIndicator isTaxInLine="yes" isShippingInLine="yes"/></td></invoice<>	DetailLineIndicator isTaxInLine="yes" isShippingInLine="yes"/>
<tnyoice< td=""><td>Partner></td></tnyoice<>	Partner>

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.

D	Detailed Information								
Т	pe:	Product							
N	aterial Number	1048948							
S	ipplier ID:								
S	applier Part Number.	Material							
U	nit:	EA							
N	aterial Group:	U311624							

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.

Irchase Request 1000001604							_			Draf
Request Name *	Shipping Address *			Supplier				ower Shoppers		
Requester Training 1000001599	Vroozi HQ		8	Ciffice Supply Inc			Power Shoppers			
Requester *	Amention: Niewhit Tester Vroazi HQ		Reason for Request							
This Purchase Request must be assigned to a Power Shopper 1	US Sichole, Whitaker+Office C +1 (818) S65-5555 efore being submitted. Please select a Power Shapper	Requester@vrocol.com								
Description		Supplier	Part No.	Category	Qty	UaM	Unit Price	Del. Date	Total 💮	Action
New Alienware 13 Gaming Laptop		Office Supply Inc	2615299	43231513	1	EA	\$899.00	03/08/2020	\$899.00	8 C N

New Workflow:

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

Purchase Request 1000001817										Draft
Request Name 1	Shipping Address *		Suppler			Approval	Srove.			
Prack Island 1000001817	Wrend Headquarters	2				0751	Operations			
Regarder * Fasek Island	Alteredana (modal) Hacigataren (1807) Torik KANNANA AVE ETE 430 (MVNC CA 49021018) UTE antikologi (Santa) (Santa) UTE antikologi (Santa) (San		Reason for Request							
Description	Supplie	er	Part No.	Category	Del. Date	Qty	UeM	Unit Price	Tetel 🗇	Action
D 1 Inspiron 15 5000 Series Laptop Available with Touch Screen	Office 1	Supply inc	2689033	48100080	07/19/2029		EA	\$598.00	\$599.00	8000
Add Law New And Annahananan Apply In Add								Solitated (1553) Shipping Charges (1853) Tas (1855) Total (1555)		00990.00 00.00 00.00 55599.00
Appraval/Rejection Notes			Supplier Notes							
Metrizon.	Stern	Sr	Polit s cate.		tderet 🔉 📀					

After clicking 'Submit' and the Requisition is <u>finalized</u>, Shoppers are prompted to select from the applicable list of Power Shoppers.

(shown on right)

oc ocicor a l'onci onoppei	
Power Shoppers *	
Power Shoppers	
Nichole Whitaker	
Naufil PowerShopper	
Cancel	Submit Request



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)

	General Information	Accounting		
Split Account As By Percent	signment			
Distribution 1	22001 - Maintenance \$294.45		Ŵ	~
Distribution 2	0000010001 - Equipment \$490.75		Ŵ	~
Distribution 3	GL2001 - Emergency services \$294.45		Ē	~
Distribution 4	20014 - Discretionary \$883.35		圃	~
	(Đ		
	Previou	s Next		



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)

eason for disputing the items of PO #2000001255									
2 0	Description	Part No.	Delivery Date	Qty	Unit Price	Reason for Dispute *	Status	Actio	
1	New Vostro 14 3000 Series		07/18/2020	2	\$349.00	Please select any reason 🗸	Ready	0	
essag Please	pe e provide additional detail for disp	ute				Out Of Stock Delivery Date Extension Incorrect Payment Terms Item Discontinued Item Specification Is Not Valid Price Rectification Quantity Update			
	Ca	incel				Others			

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)

Reason for disputing the items of PO #2000001255										
	#	Description Part No.	Delivery Date *	Qty	Unit Price *	Reason for Dispute *	Status	Actions		
	1	New Vostro 14 3000 Series	08/14/2020	2	\$349.00	Out Of Stock, Price Recti 🗸	Ready			
Mes Pe fo	sage er co rwar	a mmunication provided on 6/1 and effectiv d with your order.	Out of Stock Price Rectification Delivery Date Extension Incorrect Payment Terms Item Discontinued	like to move	2					
		Cancel				Ittem Specification Is Not Valid Quantity Update Others				

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

	#	Description	Category	Part No.	Delivery Date	Qty UoM	Unit Price	Total 🕐 Status
	1	New Vostro 14 3000 Series	48100000	2488322	07/18/2020	2 EA	\$349.00	\$698.00 Disputed
Reas Supp Supp	son fo olier's olier's	or Dispute : Out Of Stock and Price Rectificat new recommended Delivery Date : 08/14/20 new recommended price : \$349.00 USD	ion 120					



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.

Purchase Order 2000001254 has been received by Vroozi, Inc.				
07/13/2020 ISSUE DATE	1 ITEMS	\$599.00 Total		
Vi	ew Purchase Orc	ler		
Company : Vroozi, Inc. Received On : 07/13/2020		Purchase Order #: 2000001254 Receiver:		
		Requester Training <u>Nichole.Whitaker+</u> <u>OfficeRequester@vroozi.com</u>		

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.

Track Purchase Orders Access POs created by all users						
Q Search by PO # or Buyer Name						
P0 # 🖕	Version 💭	Issue Date 🌐	Buyer 🌐	Status 🌐	¢	
2000001255	1	07/13/2020	Requester Training	Disputed		
2000001254	1	07/13/2020	Requester Training	Received		



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.