Vroozi Purchase Express

Vroozi Express provides casual users the ability to create requests without having the need to access ERP platforms and systems while allowing "buy on behalf" scenarios.

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USER CONFIGURATION

VROOZI EXPRESS ROLES

<u>Employee:</u> Based on the user's configured content view, a Shopper Express employee creates shopping lists within Vroozi Purchase.

<u>Power Shopper:</u> Completes Shopping lists by converting to carts.

CREATE AN EMPLOYEE (EXPRESS SHOPPER)

There are 2 ways to set up an Express Shopper account; Creating the user manually through Vroozi Purchase or sending a self registration link.
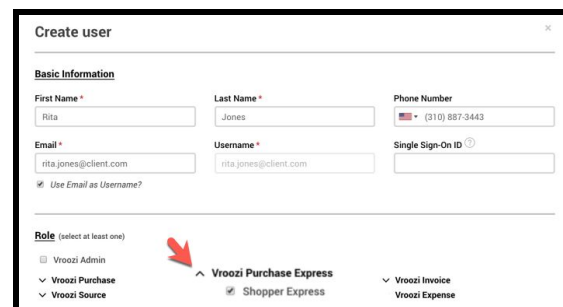
User Creation through Vroozi Purchase

1. Using your Vroozi Purchase login access User set up within Master Data
2. Once logged in, expand the 'Master Data' category and select 'Users'
3. Select 'Create a new user' and complete all Basic user information.
4. Below user information expand the Vroozi Purchase Express category to reveal 'Shopper Express' and check the box next to it. (shown next page)
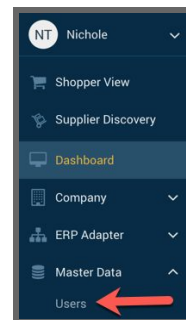
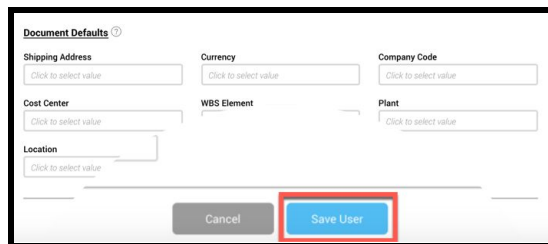***Note:*** *If your buying organization currently is not using any other aspects of Vroozi Purchase, this panel should ONLY be used for creation of Express Shoppers.*

5. *All details remaining on the user creation page are optional.

While entering the appropriate 'Content Mapping Group' is optional, it is a best practice for routing conversion of lists to specific people.
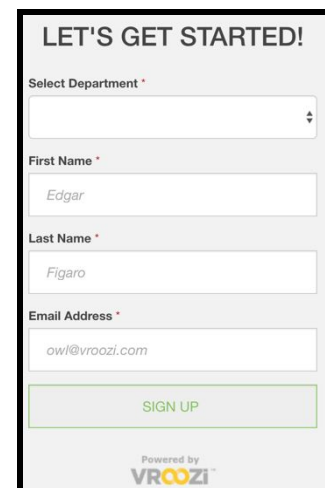
6. Once all required fields are complete, click the blue 'Save User' button.
7. The user will then receive a Registration email asking them to create a password.

Self Registration

As configured with the Vroozi Integration team, Administrators can be provided with a self registration link. This link can be shared with individuals who will be acting as Express Shoppers.

1. The user receives the registration link via email, completes all fields and selects to 'Sign Up.'
2. This triggers the Registration Notification email. Open and select to 'Activate Account.' Further details on this email can be found in the *Getting Started with Vroozi Purchase Guide*.

CREATE A POWER SHOPPER

Power Shopper user records may be created in Vroozi Purchase *ahead of* the Power Shopper accessing smartOCI via their external system. If a Power Shopper accesses smartOCI *before this record has been created* in Vroozi Purchase, Administrators will again receive email notification that a new user has registered and be asked to complete any missing data in that user's record.

The following outlines the process of creating a new Power Shopper record for a shopper that has not yet accessed the Vroozi Platform.

1. Select the 'Create a New User' button.
2. Complete the required 'Basic Information"

3. Select *Employee* and check the *Power Shopper* permission box.

Creation of a Power Shopper will not trigger an email notification to the Power Shopper since he/she will never access *Vroozi Purchase*.

Update a Power Shopper Record

Any updates to an existing Power Shopper record will trigger a different destination.

Selecting 'Send Confirmation' will save the updates and send the updated information to your external system.

See [User Roles Directory](#) for further details on role permissions.

POWER SHOPPER MAPPING RULES MANAGEMENT

Improvements have been introduced to both the access and configuration of Power Shopper Rules.

Vroozi Catalog Master Administrators upon navigating to *smartOCI->Data Mapping->Power Shoppers* will find a link directing them to the *Vroozi Purchase* Administrative Panel.

Once the hyperlinked 'click here' is selected (shown above), users will be routed to the Power Shopper Mapping screen in *Vroozi Purchase*. Power Shopper configurations can also be accessed directly within *Vroozi Purchase* by accessing *Company->Power Shoppers->Power Shopper Mapping*.
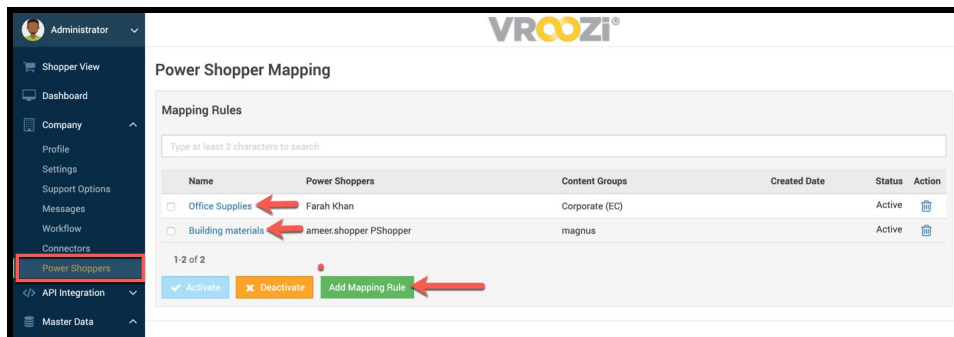
Power Shopper Rules can be defined by the following:

- **Line Item Type** (Product, Service , Blanket, Invoice Plan) Multiple types can be selected per rule.

- The **Content Group** associated to the Shopper Express user, or the Employee

- The **Company Code** associated to the Shopper Express user, or the Requisition Line Item

- The **Cost Center** associated to the Shopper Express user, or the Requisition Line Item

- The **Plant Code** associated to the Shopper Express user, or the Requisition Line Item

- The associated **Category(s)** code

- The **Supplier(s)** associated to the line item

- The total line item **Amount**

- The **Currency** associated to the line item

- The **Power Shopper**
  - A single Power Shopper can be associated with multiple mapping rules.

POWER SHOPPER MAPPING ON SHOPPING CART

In addition to enabling *Shopper Express* users to share their cart with a Power Shopper, rules can be used to allow Employees to submit their Requisition to an external system and assign to a Power Shopper in that system. For a *Shopper Express* Shopper, when they're sharing their shopping cart with a Power Shopper,

the list of Power Shoppers they can pick from is going to be based on which mapping rules are applicable to their current cart.

The rules are evaluated against every single line item in their cart as well *and* against the default preferences of the Shopper Express user creating the cart. The Vroozi system will compare the Content Group, Company Code, Cost Center, and Plant code criterion from the rules to the Shopper Express user creating the cart. Based on which rules are applicable to the cart, the system allows the Shopper Express user to select a Power Shopper to share the cart with.

EMPLOYEE (SHOPPER)

SHOPPER EXPERIENCE

1. Displays the most recently reviewed catalog items.

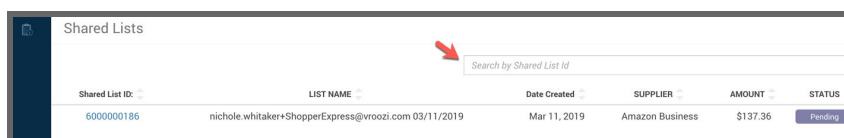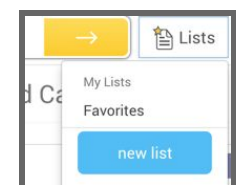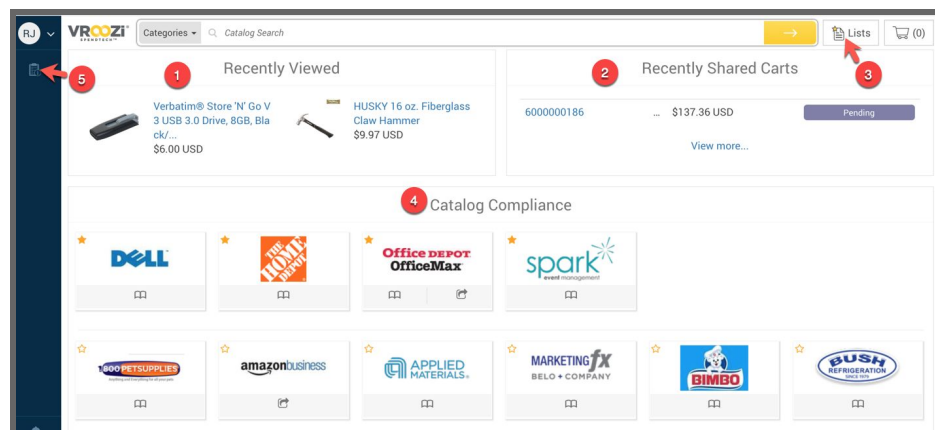2. Displays a Shopper's **5** most recent carts. Each row displays one cart detailing the cart number, the amount and status. Click 'view more' to view the repository of all carts submitted.

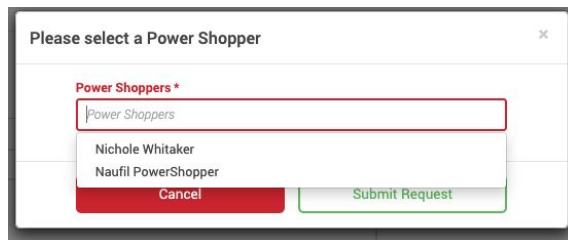3. View saved lists and/or create a 'new list.'

4. View catalogs and begin adding them to a list.
   - Click the star in the top left corner of each supplier card to pin it to the top of your Catalog list.

5. View the entire repository of shared lists. Use the search bar to search for a specific list. Search by number, supplier or keyword.

Build a List

Employees can build a shopping list from pre-configured products and services or forms from contracted and approved suppliers. The products are organized and defined by the catalogs displayed on the shopper's homepage. Once a catalogis selected users can begin viewing and adding items to their list.

Select a catalog card to open and view a specific catalog.

From the catalog view, employees can do the following:

1. Click an item name to view product specifications
2. Refine the search criteria
3. Add the item to their cart
4. [Add the item to a new or existing list template](#).

Once you have added items to your list, click the Cart icon in the top corner of your screen to display your cart items. Here you can update quantity and delete items from your list.

Send Lists to Power Shoppers

Once the list is ready for review, you are just a few clicks away from sending to a specified Power Shopper.

1. Complete all required details and update line items if needed.
2. Select 'Submit'.
3. After clicking 'Submit' and the Requisition is <u>finalized</u>, Shoppers are prompted to select from the

applicable list of Power Shoppers.

Once a list has been Sent to a Power Shopper it remains in Pending status until either of the following:

- **Pending** = The list has **not** yet been added to a cart
- **Approved:** List has been added to the Power Shopper's cart
- **Rejected:** List has been deleted by the Power Shopper

SAVE A LIST

Lists for products frequently requested together can be prepared and saved to use as often as needed. You may create as many lists as you like.

Click the star next to any item to add that item to the default 'Favorites' list or create a 'new list'.
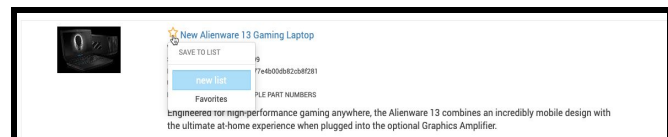
If 'new list' is selected, you can customize the list name and/or add the list item to your cart.
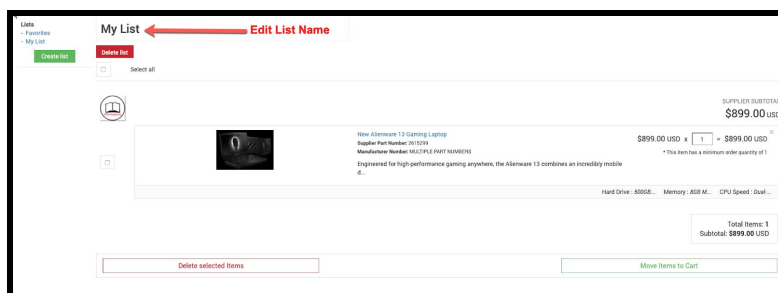
Power Shopper

Notifications

Power Shoppers will receive email notification when a new list is shared with them by an Express Shopper. The subject line of the email will include the list's unique document number.
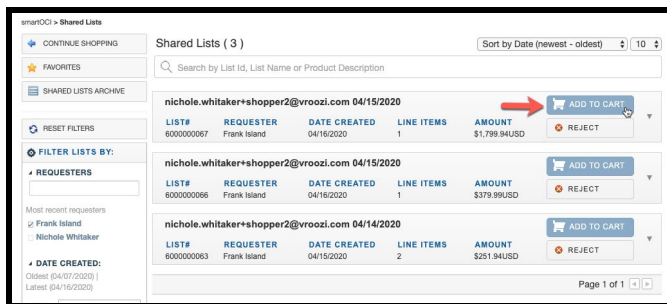
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Access Shared Lists

Upon connecting to Vroozi Catalog, Power Shoppers may access the lists shared with them via 2 locations on their homepage.


- **'Information' bar** - Located in the center of the login page this will indicate the number of lists shared.

- **Lists' icon** - Located next to the shopping cart icon, the number of shared lists awaiting review will also populate.
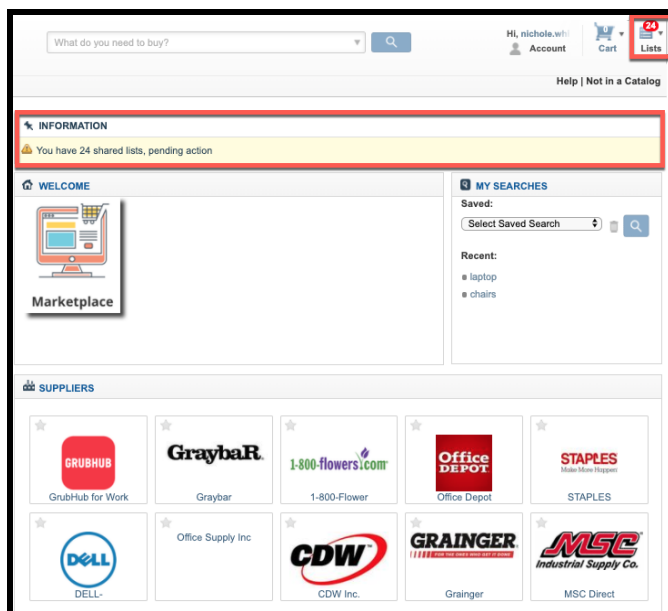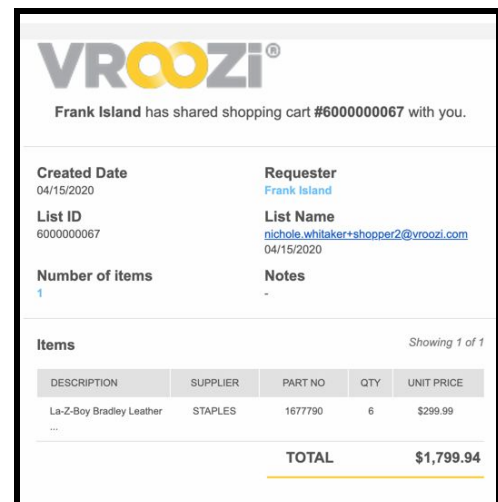

Once selected, you can view the repository of lists. Click the arrow to the right of each list to view specific item details. (shown next page)

Note: *Lists items cannot be edited from this page but can be edited once added to a cart.*

Search & Filter

Use the 'Filter Lists By' options to search for lists by specific employee, date, line item quantity or amount.

Convert List to Cart

Power Shoppers wishing to convert a list to cart may do so by selecting 'Add to Cart'.

You can add as many lists as you choose to a cart before selecting to "Checkout Now'. Example below shows 1 list already in the cart with another to be added.
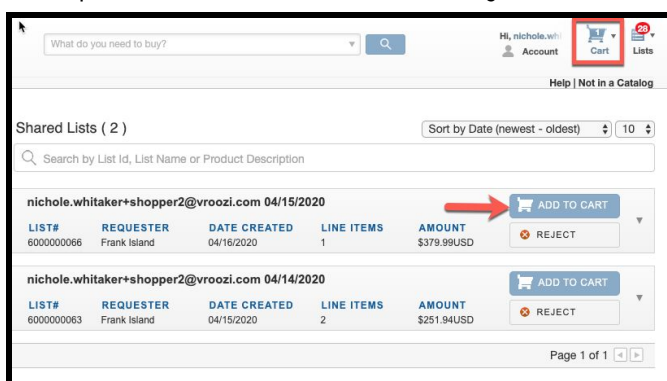
Note: *The quantity displayed on the cart icon indicates the total number of line items across all carts. The example below shows a cart with 4 total line items created from 3 lists.*
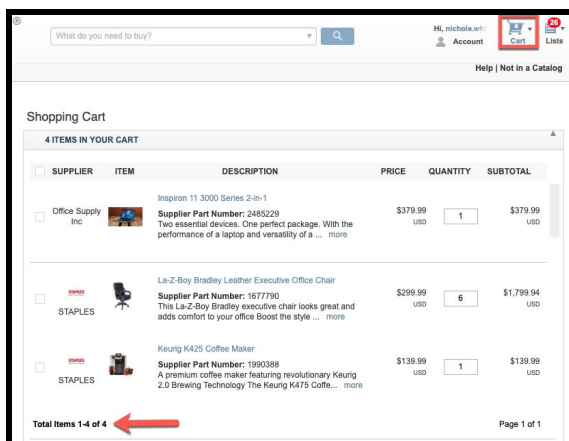

Once a list(s) has been converted to a cart, you may edit the list items and quantities (shown next page) before sending that cart to your external system. However, you may not add items to the list. If wishing to do this, you should either reject the cart and advise the user to add the appropriate items or create a new cart yourself and confirm this in the cart rejection note back to the Shopper Express employee.
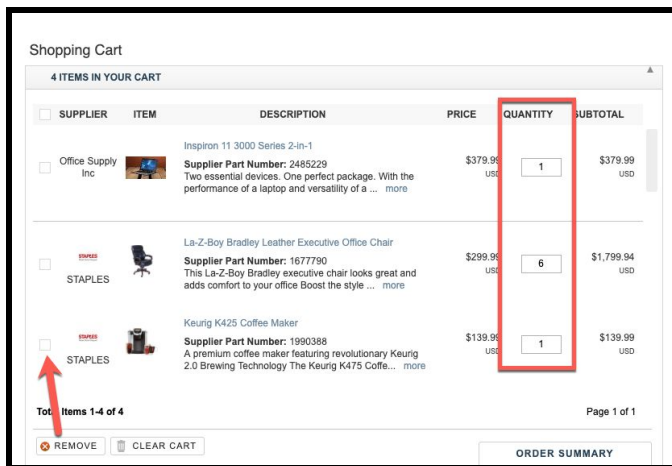
Multiple lists can be added to one cart. At which point, they will be grouped by supplier and not by individual list. The Shopper Express user is NOT notified of any of the described changes at this stage.
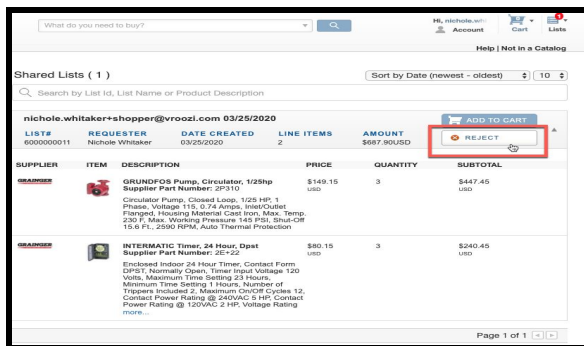
Checkout Cart: Select 'Checkout Now' to send the cart to your SRM or ERP. (shown below)
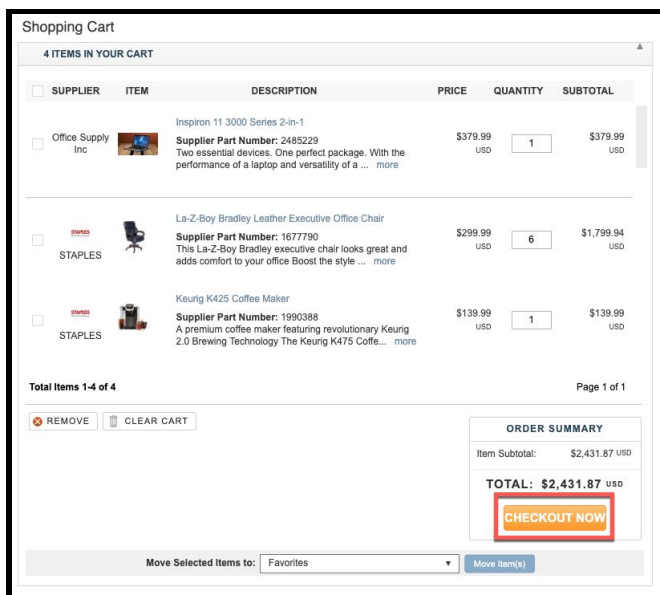
SHARED LIST REJECTION WORKFLOW

Power Shoppers are able to return a shared list back to the Shopper Express *user* when rejecting it.

Rejection selection on the Shared List view:

When rejecting a list, they may also provide notes with details about why the list has been rejected and the appropriate steps required for approval.
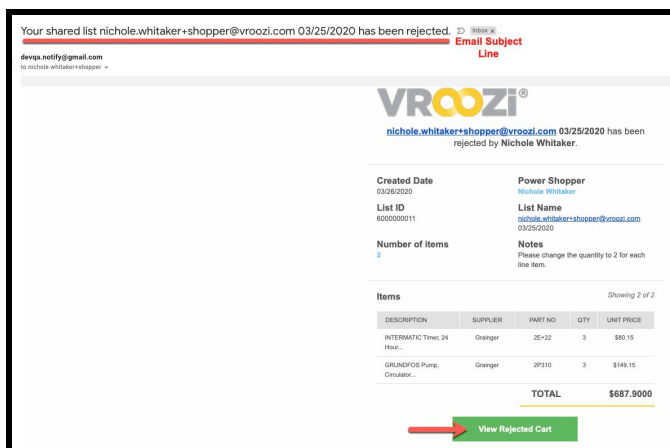
Rejection Note field:

Rejection will trigger an email notification to the Shopper Express *user* including any notes submitted during rejection.

Employees can click 'View Rejected Cart' to navigate directly to the rejected list by clicking the action button included in the email.

Shopper Express Users can view the rejection message within List view. From here, quantities can be edited, items can be removed. 'Resubmit List'.

If additional items need to be added to the current 'Rejected' List, click the horizontal ellipsis (shown on right) next to 'Resubmit List' to add the items to a new list.
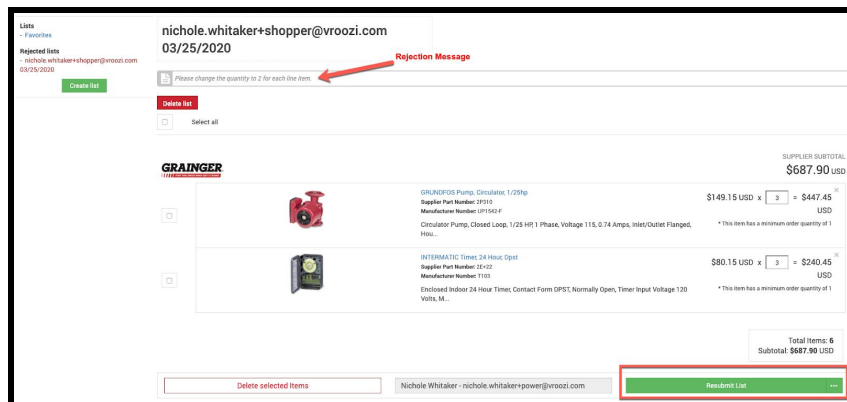

The updated list can then be resubmitted back to the Power Shopper that originally rejected it or a new Power Shopper as available in the Power Shopping selection mapping.

ADD ITEMS TO CART OR LIST

Use the search bar or search directly within the supplier catalog listed under 'Suppliers' to add items to the new cart created by you.
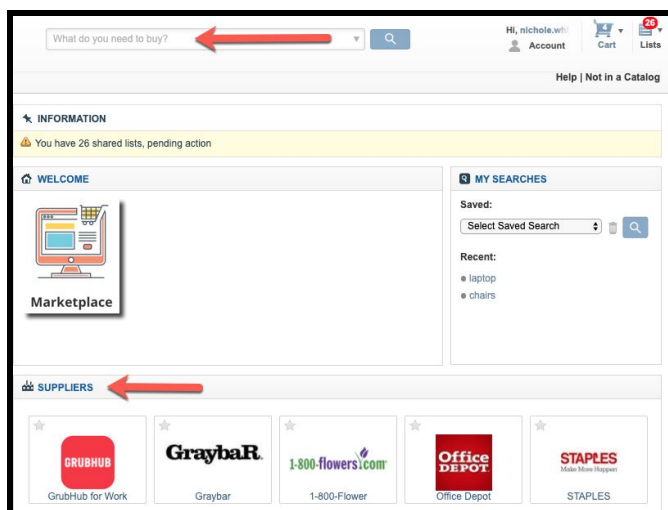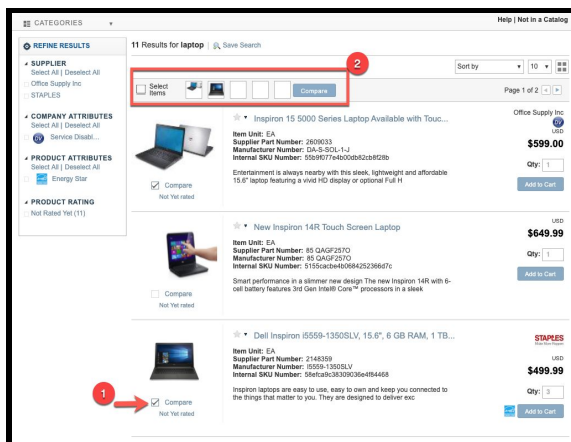

From the cart view, add items to a cart converted from an employee list by clicking 'Continue Shopping'. (shown on next page)
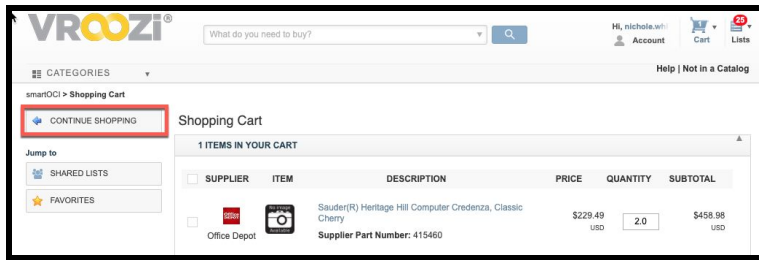
COMPARE ITEMS

Like items appearing in a search result can be compared.

1. **Check the box next to each item.**
2. **When ready select 'Compare'**

3. **At the Comparison view, add selected items to cart or select 'Back to Search Results'. (shown on next page)**