September 2020
Vroozi Release Notes

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Vroozi Invoice (AP Processors)
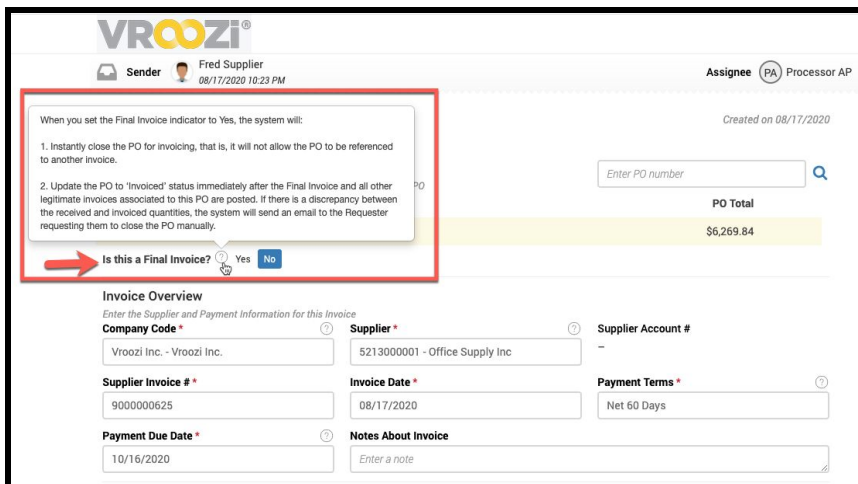
DESIGNATE INVOICE AS 'FINAL INVOICE'

AP Processors can now finalize an invoice and close the related PO. The Final invoice indicator is located directly under the linked PO (as shown below). The indicator will default to 'No' but can be changed to Final Invoice by clicking 'Yes.'

Final Invoices are most often applied to Blanket or Service POs when the allocated PO amount is not representative of the Actual PO value. The PO actual amount is what the buying organization is invoiced for.

- For example the service PO may be for $600 but the actual invoice may only come in at $550. In this case the AP Processor can elect to close the invoice for receiving and future invoices created against the PO by selecting 'Final Invoice'.

Currently Final Invoice functionality does not apply to invoices with multiple POs. The final invoice indicator will appear on invoices with more than one PO but the toggle defaulted to 'No' cannot be changed as it could be for a single PO.
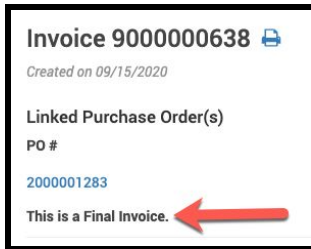
1. The PO will be closed for receiving, therefore no longer requiring a Goods Receipt.

2. If there are items that have **not** been invoiced those remaining items will be *cancelled*.

   - The non Invoiced items will be removed from the PO.
   - The auditing trail will show the changes.

> **Note:** After closing a PO for receiving and invoicing, if the PO still remains in another status besides INVOICED, an email is sent out to Requesters and/or Buyers with instructions on how to close the PO. This will ONLY happen if the amount received is higher than the amount of the 'Last Invoiced'. (See Requester notes for further details.)

Posted short closed invoices will display the message 'This is a Final Invoice' directly under the linked PO. (next page)

Invoice 9000000638 🖨

Created on 09/15/2020

Linked Purchase Order(s)

PO #

2000001283

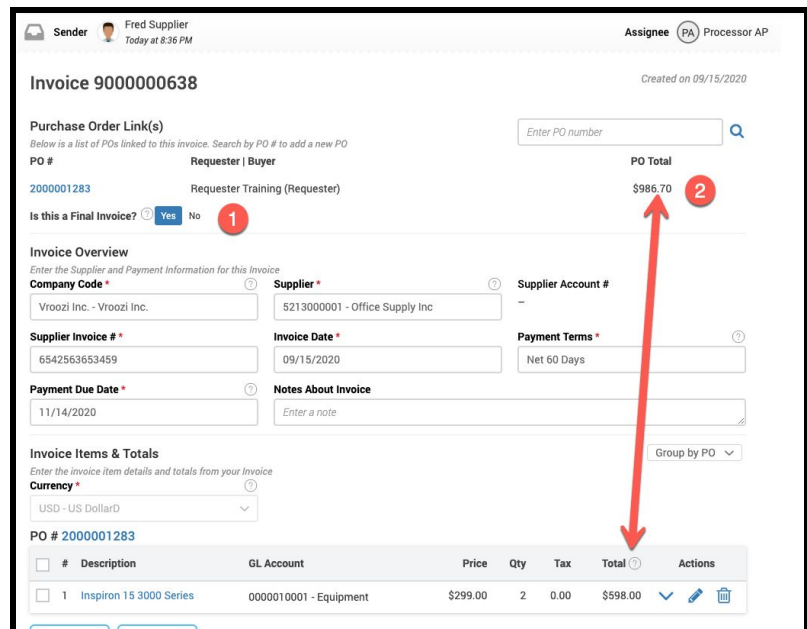This is a Final Invoice.

Additional Conditions

If other Invoices for the same PO are in progress under following statuses the system will display a warning message before marking invoice as 'Final Invoice'.

- DRAFT
- PARKED
- CODING
- EXCEPTION
- PENDING

- REJECTED
- APPROVED
- READY TO POST
- POSTING
- POSTING FAILED

Final Invoices from the Supplier Portal

In the event an Invoice is marked as a 'Final Invoice' by a supplier user in the Supplier Portal, AP Processors will see 2 identifiers on the Supplier's Invoice. (right)

1. Upon opening the Final Invoice indicator will already be flagged to 'Yes'.

2. The Linked PO will reference the original PO total while the Invoice total will reflect the short closed final invoice total.

| Sender | Fred Supplier Today at 8:36 PM | | Assignee (PA) Processor AP |

Invoice 9000000638   *Created on 09/15/2020*

Purchase Order Link(s)

Below is a list of POs linked to this invoice. Search by PO # to add a new PO

PO #	Requester | Buyer		PO Total
2000001283	Requester Training (Requester)		$986.70

Is this a Final Invoice? ⓘ **Yes** No

Invoice Overview

Enter the Supplier and Payment Information for this Invoice

Company Code * ⓘ	**Supplier** * ⓘ	**Supplier Account #**
Vroozi Inc. - Vroozi Inc.	5213000001 - Office Supply Inc	–

Supplier Invoice # *	**Invoice Date** *	**Payment Terms** * ⓘ
6542563653459	09/15/2020	Net 60 Days

Payment Due Date * ⓘ	**Notes About Invoice**	
11/14/2020	Enter a note	

Invoice Items & Totals   Group by PO ⌄

Enter the invoice item details and totals from your Invoice

Currency * ⓘ

USD - US DollarD ⌄

PO # 2000001283

	#	Description	GL Account	Price	Qty	Tax	Total ⓘ	Actions
☐	1	Inspiron 15 3000 Series	0000010001 - Equipment	$299.00	2	0.00	$598.00	⌄ ✎ 🗑

Vroozi Supplier Portal (Supplier Users)

FINAL INVOICE

As noted in the previous enhancement, the ability to define an invoice as a 'Final Invoice' will also apply to Supplier Portal Users. Like AP Processors at the buying organization, the Invoice 'Draft' will include the Final Invoice indicator just below the referenced PO.

Supplier users viewing an invoice designated as 'Final Invoice' by the buying organization, will see "This is a final invoice." noted on the Invoice. This message will be visible once the Invoice has been processed and submitted for coding, approval, or posting by the buying organization. (below)

SUPPLIER NOTIFICATIONS FOR CANCELLED POs

PO cancellation emails will now be sent to suppliers who are using email or Supplier Portal for their invoice transmission method.

1. This functionality is enabled based on a global setting found in the Administrator Panel. *Documents -> Settings -> Purchase Orders -> Allow PO Cancel*

2. If the permission is enabled, a Purchase Order may be canceled by the Requester, the Buyer, or Administrator.

When a Purchase Order is cancelled both the supplier and the originator of the PO will receive an email notification. A notification must be sent to the following people:

Supplier

The Supplier email subject line will contain the PO number, that it was

cancelled and the name of the Buying Organization.
At onset, cXML suppliers will not receive cancelled PO notifications. This capability
will be added in a future release.
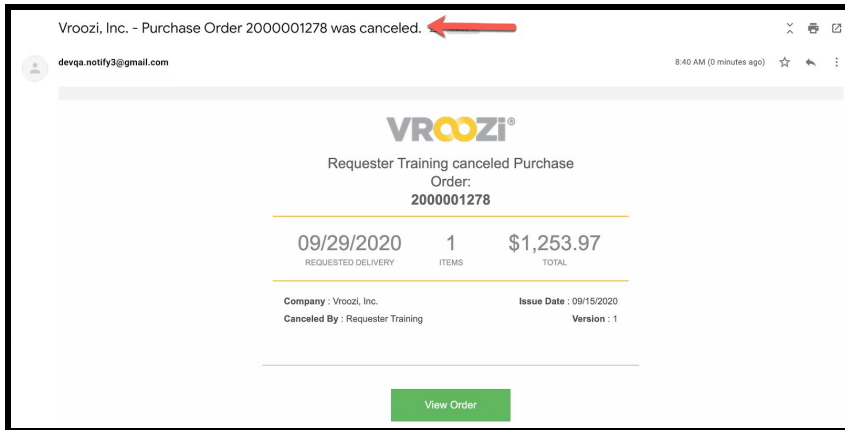
Requester or Buyer

The Requester email subject line will contain the PO number and the canceled
status. The Buyer if applicable will receive this notification as well.
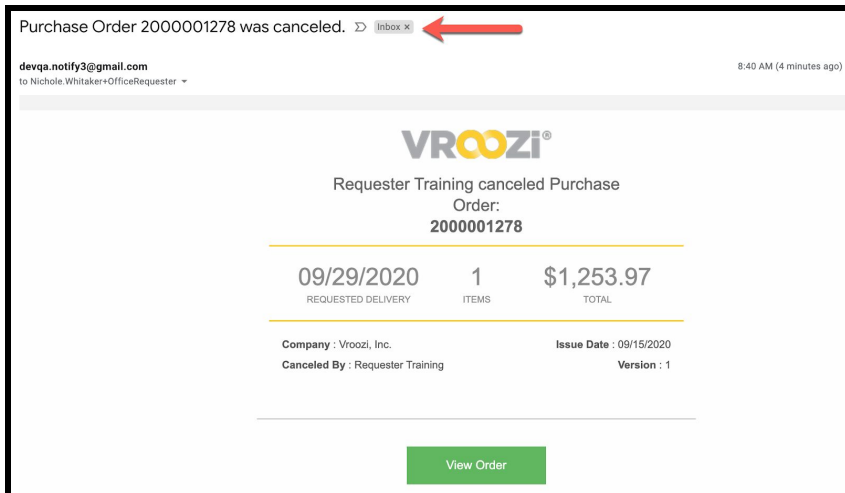
Vroozi Purchase (Requesters/Buyers)

NAVIGATION PANEL UPDATE FOR REQUESTERS

In an effort to improve user navigation and understanding the Navigation Panel categories have been re-labeled for Requesters, Buyers, Central Receivers and Administrators (via the *Shopper View)*. The images below contrast the *Previous* (left) Requester panel design and the *New* design (right).

- *Create Request* is renamed to **Create**

- *Request Status* is re-named to **Purchase Requests**

  - *Free Text* is renamed to **Non Catalog Request**

  - *Bulk Upload* is renamed to **Bulk Upload Request** (only visible if permission has been added to user record)

- *PR Status* is renamed to **Purchase Requests**

- *PO Status* is renamed to **Purchase Orders**

- *Receipt Status* is renamed to **Receipts**

- *Resolve Invoices* is renamed to **Invoices**
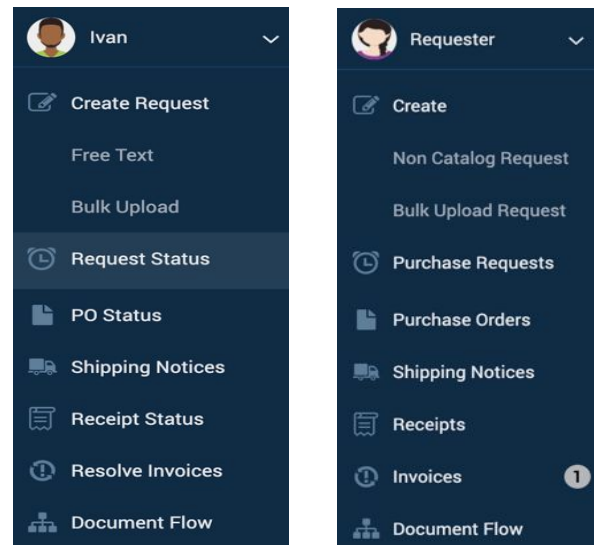
CLOSED PO AFTER A FINAL INVOICE

A Final Invoice indicates that some but not all of the items contained in the referenced PO will be invoiced. This could be the case in the event that a supplier is short on their ability to fulfill an order, an item is returned before an invoice is created, etc.

Final Invoice on a PO without a complete Goods Receipt

In this event, a buying organizations AP team closes the PO for receiving by creating a Final Invoice *and* a Goods Receipt has not yet been completed against the PO, the PO will automatically close for receiving, a Goods Receipt will not be required and the status of the PO will change to 'Invoiced'.

Final Invoice on a PO with a completed Goods Receipt

In the event a Receipt is completed/confirmed for the full amount before the AP Processor determines that the invoice is *Final*, the Requester/Buyer will receive an email with instructions on how to proceed. (below)

Resolutions

Vroozi Express

✓ Previously, when a Shopper Express user tried to share their cart with the Power Shopper, the system was sending an error that disabled the Shopper's ability to successfully complete the action. This issue has now been resolved.