

Purchase Approver Guide

The following guide covers all aspects of the Vroozi Financial Approver role in *Vroozi Purchase*. Based on your organization's requisition workflow there may be many approvers in the approval chain.

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PROFILE

PERSONAL DETAILS

Upon logging in for the first time, all users should update their personal details. See your Getting Started Guide for further details.

PIN CODE

For approvers the Pin Code field is particularly important. See the [Approve on the Go!](#) section for further details.

The screenshot displays the 'Personal Details' section of a user profile. On the left is a dark blue sidebar with navigation options: Reports, Document Flow, Approve Requests, and Approve Expenses. The main content area shows the user's name 'Sam' and a dropdown arrow. Below this is the 'Personal Details' section, which includes a circular profile picture of a man. Underneath the picture are two buttons: 'Upload New Avatar' (blue) and 'Delete Avatar' (red). The form fields are organized into two columns. The left column contains 'First Name' (Sam), 'Last Name' (Shields), and 'Contact Title' (Sr. IT Director). The right column contains 'Email' (approver@vroozi.com), 'Username' (approver@vroozi.com), 'Telephone' ((310) 555-1212), 'Fax' ((310) 555-1211), and 'Pin Code' (****). The 'Pin Code' field is highlighted with a red border. At the bottom center of the form is a green 'Save' button.

APPROVER SETTINGS

ALTERNATE APPROVER

Essentially acts a “clone” of the original approver

- Receives the **same** email notifications and can perform the **same actions** as the original
 - “Inherits” the same attributes as the original, including approval levels and next approver
 - Requisition and approval status show up in both user’s approval queues
-

When to Use

- A long-term “back-up” or “second contact” for approvals
- Coverage for unplanned availability
- Minimizes maintenance activity

Need to Know

- This creates a scenario where both users can attempt the same action.
- Requisitions show up in both user’s queues.
- Changes affect only newly created documents, not previously existing ones.
- The settings are performed and visible only within the approver’s profile.

OUT OF OFFICE

A temporary process that forwards emails/actions to another user

- Retains same roles/privileges as initially set for a limited time period
- Easy to set and control; automatically expires

Need to Know Info:

- ✓ Changes affect only newly created documents, not previously existing ones
- ✓ The settings are performed and visible only within your own

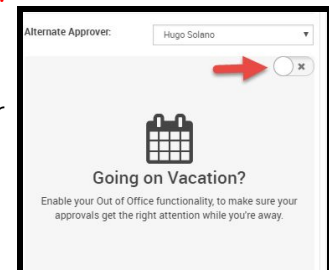
Next Steps

- ✓ **Review** your current approver levels/flow
 - *next approver; fallback approver; auto-forward time*
- ✓ **Inform** your Alternate or OOO approver of the setting
 - Alternate and OOO together are not compatible

ENABLE OUT OF OFFICE

**OOO is only available if activated by your Vroozii Administrator.*

To get started, open your User Profile and turn on the Vacation Responder “On”. (shown on right) Once the Vacation Responder is activated, complete the following steps:



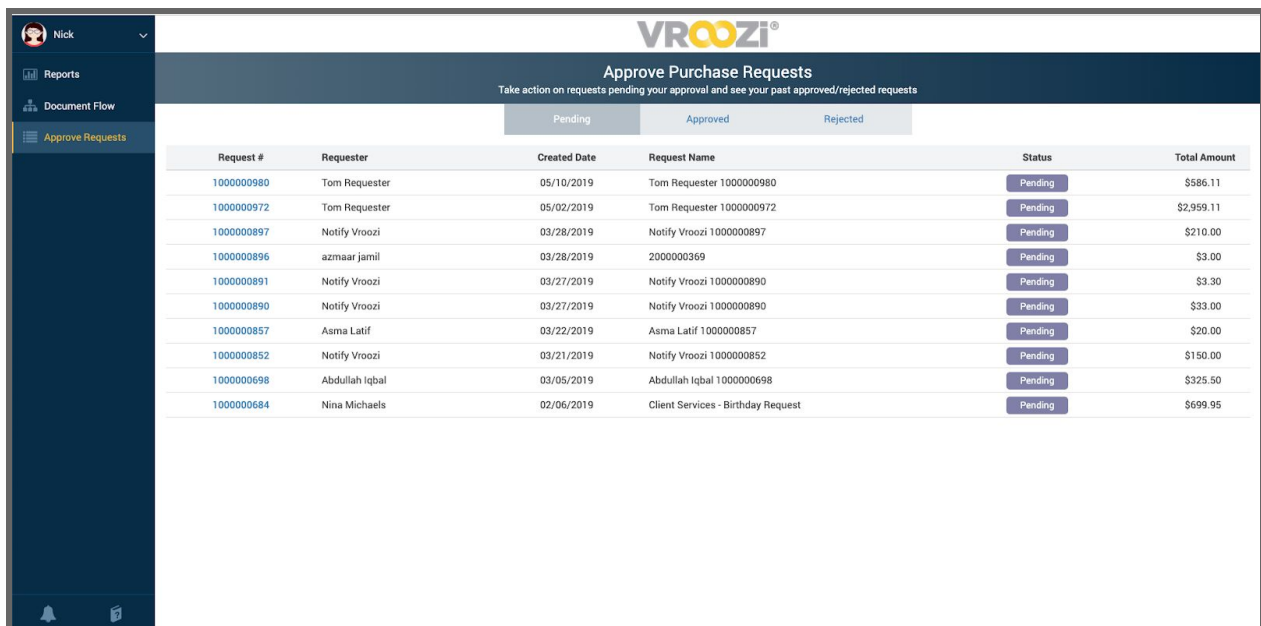
1. Enter the **Starting Date**
2. Enter the **Ending Date**
3. Complete Out of Office Message.
4. Select if you want your approvals forwarded. If a **Specific Approver** is selected, you will be prompted to select that person.
 - *Note: Selection of ‘Do Not Forward’ could be overwritten by any global approval queue settings defined by your administrator.

5. Select an Approver from the list of Approvers defined for your organization.
6. **'Save Out Of Office Settings'** to confirm vacation changes

NAVIGATION PANEL

When logging in as a Financial Approver you are immediately redirected to the Pending tab within the 'Approve Requests' category in your Navigation Panel.. Here requests are divided into 3 statuses.

- **Pending:** Displays any requests requiring your response.
- **Approved:** The Approved tab indicates PRs you have approved. At which point the Purchase Request has converted to a PO or if using a staircase workflow, may be going through further approvals.
- **Rejected:** The 3rd tab houses requests that you have rejected.



The screenshot shows the VROOZI 'Approve Purchase Requests' interface. The top navigation bar includes 'Reports', 'Document Flow', and 'Approve Requests'. The main content area displays a table of pending requests with columns for Request #, Requester, Created Date, Request Name, Status, and Total Amount. The 'Status' column shows 'Pending' for all listed requests, each with a corresponding 'Pending' button. The 'Request Name' column contains details such as 'Tom Requester 100000980' and 'Notify Vroozii 100000897'.

Request #	Requester	Created Date	Request Name	Status	Total Amount
100000980	Tom Requester	05/10/2019	Tom Requester 100000980	Pending	\$586.11
100000972	Tom Requester	05/02/2019	Tom Requester 100000972	Pending	\$2,959.11
100000897	Notify Vroozii	03/28/2019	Notify Vroozii 100000897	Pending	\$210.00
100000896	azmaar jamil	03/28/2019	2000000369	Pending	\$3.00
100000891	Notify Vroozii	03/27/2019	Notify Vroozii 100000890	Pending	\$3.30
100000890	Notify Vroozii	03/27/2019	Notify Vroozii 100000890	Pending	\$33.00
100000857	Asma Latif	03/22/2019	Asma Latif 100000857	Pending	\$20.00
100000852	Notify Vroozii	03/21/2019	Notify Vroozii 100000852	Pending	\$150.00
100000698	Abdullah Iqbal	03/05/2019	Abdullah Iqbal 100000698	Pending	\$325.50
100000684	Nina Michaels	02/06/2019	Client Services - Birthday Request	Pending	\$699.95

REQUISITION TYPES

Within Vroozi, requesters may submit several types of requisitions.

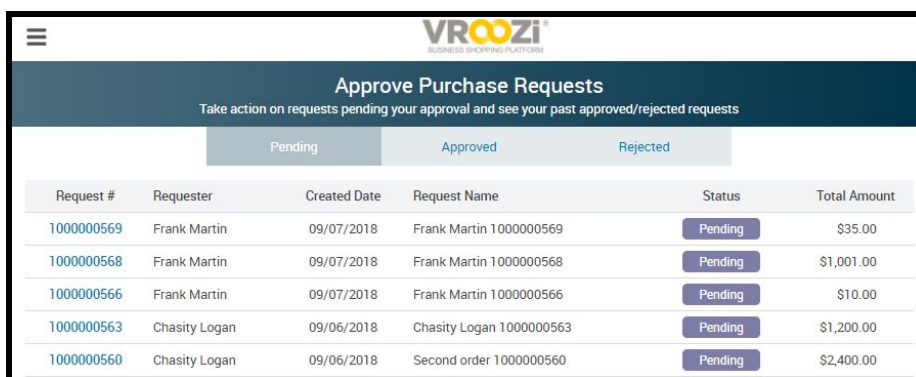
- **Catalog:** Includes both searchable Internal Catalogs and Punchout Catalog items and services.
- **Non-Catalog:** Free Text line items for vendor products or services that are not available in the catalogs.

**Requisitions submitted may include both free text and catalog items.*

- **Blanket or “Limit”:** A type of *Non-Catalog Free Text* request that consists of a requirement that will be delivered over a period of time.
- **Invoice Plan:** An automatic scheduled payment plan, like scheduled monthly lease payments or interval payments. This section outlines how to create an *Invoice Plan* by using the *Non-Catalog Free Text Request* functionality.

APPROVE FROM YOUR COMPUTER

1. Locate the request you would like to take action on.
2. At login you are directed to the Pending Menu as these are requests that require the action of the Approver



Approve Purchase Requests					
Take action on requests pending your approval and see your past approved/rejected requests					
Pending Approved Rejected					
Request #	Requester	Created Date	Request Name	Status	Total Amount
1000000569	Frank Martin	09/07/2018	Frank Martin 1000000569	Pending	\$35.00
1000000568	Frank Martin	09/07/2018	Frank Martin 1000000568	Pending	\$1,001.00
1000000566	Frank Martin	09/07/2018	Frank Martin 1000000566	Pending	\$10.00
1000000563	Chasity Logan	09/06/2018	Chasity Logan 1000000563	Pending	\$1,200.00
1000000560	Chasity Logan	09/06/2018	Second order 1000000560	Pending	\$2,400.00

3. From here, select to 'Approve' or 'Reject' the Requisition.

Purchase Request
1000001892

Submission Date: 10/19/2020
Request Name: Requester Training 1000001892
Requester: Requester Training

Shipping Address: Attention: Requester Training, Vroozzi HQ, 15000 VENTURA BLVD, SHERMAN OAKS, CA 91403-2443, US
Requester: Nichole Whitaker-OfficeRequester@vroozzi.com, +1 (818) 555-5555

Supplier: Office Supply Inc
Purchase Order Number: -
Reason for Request: -

#	Description	Supplier	Part No.	Category	Del. Date	Qty	UoM	Unit Price	Total
1	Inspiron 11 3000 Series 2-in-1	Office Supply Inc	2485229	48100000	11/03/2020	1	EA	\$379.99	\$379.99
2	New Inspiron 17 5000 Series4K	Office Supply Inc	2609032	48100000	11/03/2020	1	EA	\$802.00	\$802.00
Subtotal (USD)									\$1,181.99
Shipping Charges (USD)									\$0.00
Tax (USD)									\$118.20
Total (USD)									\$1,300.19

Approval/Rejection Notes

Buttons: Add Note, Notes to Supplier, Notes from Supplier, Reject, Edit, Approve

APPROVE FROM YOUR MOBILE DEVICE

Once your 4 digit Pin Code has been saved in your user Profile, you are ready to approve on the go!

Approve or Reject: Tap/Click the “APPROVE” option. You will be directed to the Vroozzi Authentication screen where you’ll enter your PIN code and reason.

Once Rejection or Approval is complete a confirmation screen will appear.

VROOZI
BUSINESS SHOPPING PLATFORM

You chose to reject Purchase Request
1000000579

Please enter your PIN code below to confirm

1
Enter Your PIN Code *

2
Leave a Note for the Requester
Rejected as this request is over QTR 3 Budget.

Confirm Rejection

APPROVAL NOTES

Whether approving from your computer or on the go, approval or rejection of a requisition will prompt Approvers to provide a note. This is an optional field.

Add Approval Notes

Approval Notes

Approve

EDIT A REQUISITION

Depending on individual permissions set up at user creation, approvers may have the ability to edit the accounting segments on a Requisition.

To edit the details of a request:

1. Click 'Edit' at the bottom of the Requisition view.
2. The information at the top of the request form includes the Request name, Supplier, Submitted date and Requester.
3. The price and any items related to the specific line items, services or goods cannot be edited. Only the line item accounting string is editable with the Approver editing permission. (See next page)
3. Select to *Save Item*.

Changes to these fields will not require the review of the Requester but may

again be changed by another approver if part of a workflow. Or they could be adjusted at the AP level when approving the Purchase order that by that point has converted to an invoice.

If your organization does not allow changes at the approver level, adjustments are left to the AP team who again can make changes once the PR becomes converted to an Invoice.

Once all details are reviewed, select 'Done' to pass the Requisition forward to the next stage of the procurement process.

APPLY TO ALL EDITING

1. Select the line items you would like to update with the same accounting information by checking the boxes to the left of each.
2. Click 'Apply to All'.

#	Description	Supplier	Part No.	Category	Qty	Unit	Unit Price	Est. Date	Total
1	MacBook	Apple	37902	52150000	2	EA	\$1,999.00	02/18/2019	\$3,198.00
2	iPhone 5c	Apple	35798	52150000	2	EA	\$450.00	02/18/2019	\$900.00

3. Make appropriate changes and select 'Apply Changes'. You will be returned to the Line Item Overview and your Line Items will be updated.

SPLIT ACCOUNT ASSIGNMENT

While in the Edit a Request screen, you have the choice to amend the Line Item Details of the items or services you have selected.

1. From the Purchase Request screen, locate the item you would like to split and click on the linked item Description.
2. Scroll down to the Accounting section.
3. Choose how to split the Account Assignment—by Quantity, by Value or by Percent.
4. Choose an Account Category (i.e. Cost Center) from the drop down menu. The Cost Object options will automatically update based on your selection.

Accounting

Split Account Assignment **3** By Quantity required

Account Category #1 **4** By Quantity

Cost Center #1 **5** By Value

Quantity #1 **6** 1

Account Category #2 **7**

Quantity #2 **7**

8

- 5.** Choose the corresponding Cost Object.
- 6.** Enter your Quantity, Value or Percent for the first part of your Accounting Split.
- 7.** Input the split information for the second Account Category.
- 8.** If more than two splits are needed, click the + button and continue filling out the relevant information for each until completed.
- 9.** Scroll down and click the Save button to update the Line Item. (not pictured)