

November 13, 2020

November 2020

Vroozzi Release Notes

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Indicates a User Interface enhancement

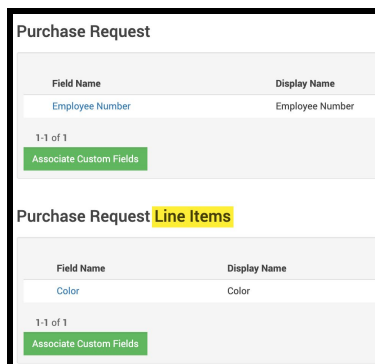
Vroozzi Purchase (Administrators)

CUSTOM FIELD ASSIGNMENT BY DOCUMENT TYPE AT THE LINE ITEM LEVEL

Vroozzi now provides you with additional flexibility to define specific Line Item Custom Fields down to the document type. In addition to the assignment of a Custom Field at the catalog level, or the document header level, Custom Fields can now be set against the line items of a specific document type. This means you can now create specific line item custom fields for your Goods Receipt and/or your Purchase Orders.

Configuration

From the admin panel, the line item assignment can be found in the individual configuration of a custom field (*shown on right*) and directly under the custom field lists for each document.

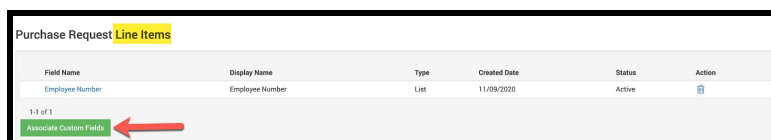
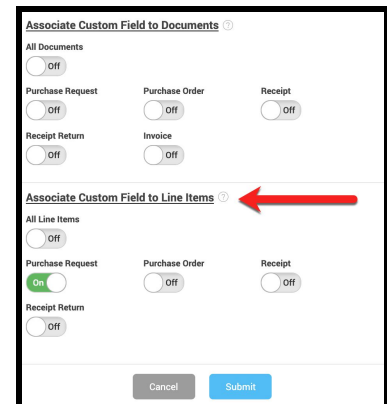
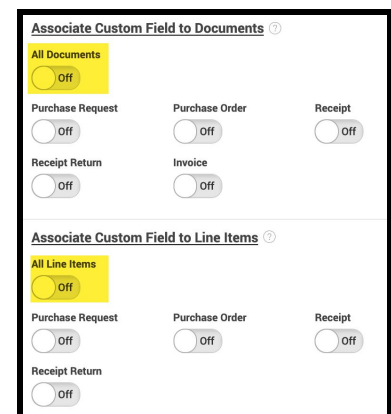


All existing custom field functionality including the assignment of requirements against particular categories and/or suppliers can be applied to the new line item configuration.

In support of the new line item configurations, the 'All Documents' toggle has been added to the document level requirements. Similarly, the Line item

configuration includes the toggle 'All Line Items'. (right)

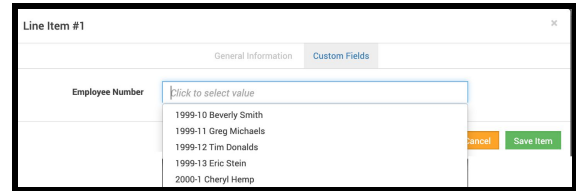
Existing Custom Fields can also be selected and added from the Document Type Line Item view. Simply, check the box next to a custom field to associate to the document line item.

Workflow

Once added, the Custom Field will appear in the 'Custom Fields' tab of the appropriate line item for the assigned document type. (PO, GR, etc)

If the custom field is required and no default value is set, the custom field will behave like a header level custom field prohibiting field with a warning above the line item noting that the custom field is missing. Requesters/Buyers will select to edit the line item, select the Custom Fields tab and complete the line item custom field for the particular document.



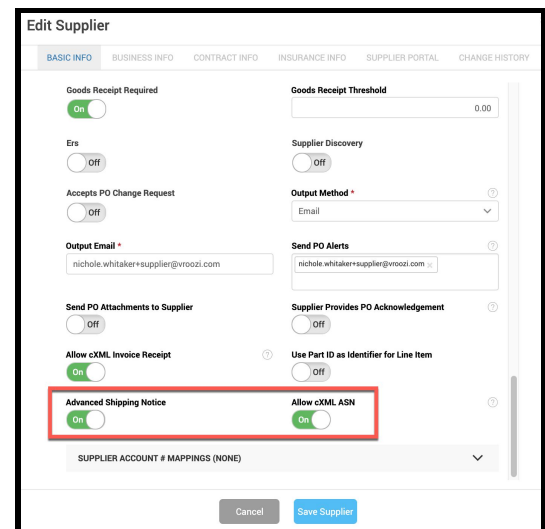
ADVANCED SHIPPING NOTICES SENT VIA cXML

Vroozi can now support the receipt of supplier sent Advanced Shipping Notices (ASNs) via cXML transmission. An ASN is a supplier initiated document created against a PO that notifies the recipient of the anticipated shipment and delivery dates for the items contained in the PO. It often also includes carrier and tracking information.

Configuration

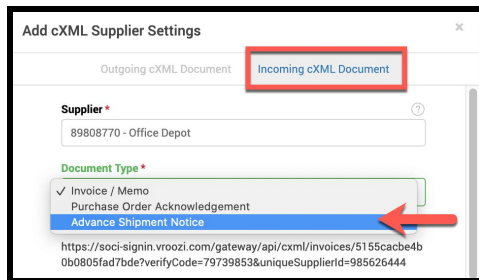
Customer organizations ready to move forward with cXML Advanced Shipping Notices must request ASNs be turned on for their account. You can do so by creating a ticket with the support team via the [Vroozi HelpDesk webform](#).

Once enabled on the backend by our technical team, administrators will have two (2) steps to complete.



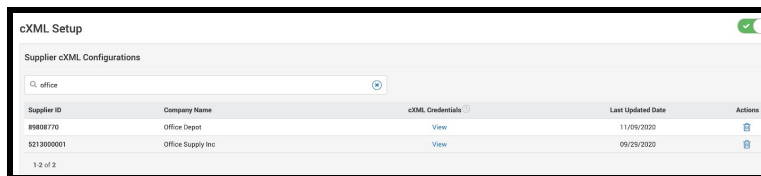
Access the *Basic Info* tab of the supplier's record. At the bottom of this tab, locate the 'Advanced Shipping Notice' toggle.

- Once toggled **on**, an additional toggle; 'Allow cXML ASN' toggle will appear. Both ASN toggles must be turned on. (next page) Both toggles will default to 'Off'.



2. Define the cXML ASN configurations in the *Documents -> cXML Setup* category of the navigation panel.

- Configured ASN credentials can be accessed, viewed or deleted from the cXML Supplier Configurations view.

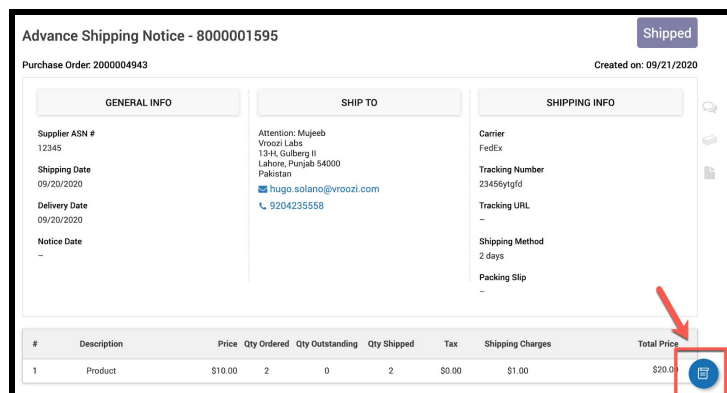


Workflow

After configuration, Requesters/Buyers will be able to view Advance Shipping Notice documents received from suppliers via cXML under their newly added 'Shipping Notices' category within their navigation panel. This category is only visible in the Requester navigation panel if cXML ASNs have been enabled for their organization.

Requesters/Buyers will also receive an email notification when a new ASN is sent by a supplier.

From the ASN view Requesters may choose to create a Goods Receipt for the related PO. This can be achieved by selecting the receipt icon in the bottom right hand corner. (shown on right) From here, the Goods Receipt draft and steps to completion will be the same as if created from the 'PO View' or the 'Receipts' category.



Note: A Supplier may also now cancel the ASN via cXML. Cancellation of the ASN is allowed under the following conditions:

- An ASN has already been received by the Requester
- An ASN can only be cancelled while the PO is still in 'Shipped' status. Once the status changes to Received, cancellation is no longer possible

INCREASED POCR PERMISSIONS FOR 'SHIP TO ADDRESS' AT THE LINE ITEM

A POCR permission has been added to allow user reassignment of the shipping address at the line item level. Previously this could only be done on the PO header.

Configuration

From the POCR settings (Documents -> Settings) the 'Change Shipping Info' toggle appears in the line item permission section.

The screenshot shows the 'PO Change Request' settings. Under the 'On the PO line item, allow users to:' section, the 'Change Shipping Info' toggle is turned on and highlighted with a red box. Other toggles include 'Add Items', 'Remove Items', 'Edit Items', 'Change Accounting Info', 'Edit Custom Fields', and 'Change Shipping Info' under the header section.

Workflow

Once a Requester requests a 'Change Order' from the PO view and opens an applicable line item they will have access to any administrator created addresses.

If enabled at the administrative level, Requesters may also select from any addresses they've personally created in their 'My Data'. These addresses will be housed under the 'My Addresses' label. (shown on right)

Once selected and saved, like all POCR changes, the change of address information is captured in the Purchase Order History via the right nav panel. (next page)

The screenshot shows the 'Location Info' dropdown menu. It has a 'Ship to Address' label and a search bar. Below the search bar, there are two sections: 'My Addresses' and 'Ship to Addresses'. The 'My Addresses' section lists 'Vroozi HQ' and 'Tempe Office'. The 'Ship to Addresses' section lists 'Admin Labb' and 'Austin Office'.

POCR DETAILS

Today at 4:33 PM
6 change(s) made to the PO#2000001309

Sport Band CHANGED

Quantity: 2 Price: \$49.00

MacBook CHANGED

Quantity: 3 Price: \$1,599.00

Old Value:
Attention: Requester Training
Vrooz HQ
15000 VENTURA BLVD
SHERMAN OAKS, CA 91403-2443
US
Nichole.Whitaker+OfficeRequester@vrooz.com
+1 (818) 555-5555

New Value:
Attention: Mike Evans
Philly Office
1500 S 9TH ST
Floor: 6
PHILADELPHIA, PA 19147-6403
US
+1 (856) 555-5555

The 'Apply to All' feature (shown on right) under the item description view, allows Requesters to choose multiple line items for a single address change.

Change Request

<input type="checkbox"/>	#	Description	Supplier	Qty
<input checked="" type="checkbox"/>	1	Keurig K425 Coffee M...	STAPLES	1
<input type="checkbox"/>	2	Staples 4-Drawer Lett...	STAPLES	3
<input checked="" type="checkbox"/>	3	La-Z-Boy Bradley Leat...	STAPLES	1
<input type="checkbox"/>	4	La-Z-Boy Bradley Leat...	STAPLES	1
<input checked="" type="checkbox"/>	5	Staples 4-Drawer Lett...	STAPLES	3
<input type="checkbox"/>	6	Keurig K425 Coffee M...	STAPLES	1

Add Line Item Add Attachment **Apply to All**

Requesters may then select a new address or select a 'Account Preset' previously created. (next page)

Apply to Line Items

APPLY TO: MANAGE PRESETS

Select Account Preset: None

Split Account Assignment: None

Company Code: Vroozi Inc. - Vroozi Inc.

Account Category: Cost Center (required)

Cost Center: 10 - Executive (required)

G/L Account: 20014 - Discretionary (required)

Project: Click to select value

Location: Click to select value

Currency: USD

Plant: Vroozi Inc. - Vroozi Inc. (required)

Shipping Address: Click to select value (red arrow points here)

Tax Code: Ship to Addresses

Admin Labb

Austin Office

Philly Office

VROOZI LABS

Apply Changes

Supplier Portal Workflows

Suppliers accessing the *Vroozi Supplier Portal* will see the change request called out on the PO view just as they would other line item changes.

Like the Requester/Buyer, Supplier Portal users will also see the specific details of the change in the Right Action panel via 'Purchase Order History'.

Item 2 has been updated.

	#	Description	Category	Part No.	Delivery Date	Qty	UoM	Unit Price	Total	Status
<input type="checkbox"/>	1	Inspiron 11 3000 Series 2-in-1	48100000	2485229	11/24/2020	1	EA	\$379.99	\$379.99	Ready
<input type="checkbox"/>	2	Inspiron 11 3000 Series 2-in-1	48100000	2485229	11/24/2020	1	EA	\$379.99	\$379.99	Ready

The Shipping Address has been updated (red arrow points here)

POCR DETAILS

Today at 7:28 PM

2 change(s) made to the PO#2000001311

Notes to Supplier was changed

Inspiron 11 3000 Series 2-in-1 CHANGED

Quantity: 1 Price: \$379.99

Old Value:

Attention: Requester Training

Vroozi HQ

15000 VENTURA BLVD

SHERMAN OAKS, CA 91403-2443

US

Nichole.Whitaker+OfficeRequester@vroozi.com

+1 (818) 555-5555

New Value:

Attention: Vroozi (red arrow points here)

Austin Office

1788 2nd Ave

Building: 2

Floor: 2

Austin, TX 78703

US

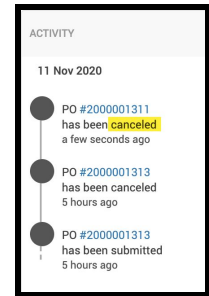
+1 (512) 555-5555

Vroozi Purchase (All)

EMAIL NOTIFICATION ON CANCELLED cXML AND SUPPLIER PORTAL POs

Vroozi has enhanced the flow of communication with your cXML and Supplier Portal suppliers when a PO is cancelled in the system. Now, when a PO is cancelled by your organization, the corresponding cXML supplier will receive an electronic cXML cancellation transmission.

Similarly Supplier Portal users will receive an email notification. This accompanies existing functionality for Portal users wherein a cancelled PO is documented in the 'Activity' stream (shown on right) as well as on the actual PO. The email serves as an additional notification to ensure cancellation is properly reviewed at the supplier level.

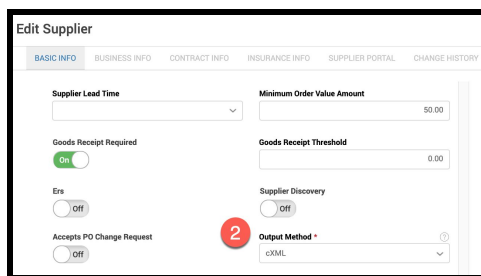
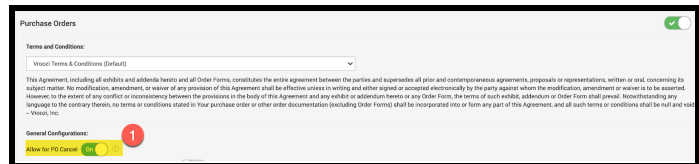


Note: Suppliers whose output method is 'email' have already been receiving cancellation emails. Similarly, all internal stakeholders (Requester/Buyer) will continue to receive email confirmation of their PO cancellation.

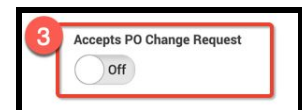
Configurations

In order to enable this communication, several settings must be configured:

1. The global 'PO cancel' toggle found in *Documents -> Settings -> Purchase Orders* must be turned on.
2. From the Supplier's record on the 'Basic Info' tab, the 'PO Output method' must be selected as 'cXML' or Supplier Portal.



3. For cXML suppliers an additional feature on their supplier record must be toggle on; 'Accepts PO Change Request'.



- Still from the Supplier Record, regardless of whether the customer's output method is cXML Supplier Portal, the appropriate supplier contact email addresses must be added to the 'Send PO Alerts' field. Example below shows cXML Output Method with 'Alerts' emails.

Workflow

When a Requester cancels a Purchase Order from the 'PO View', a notification is sent to the following people:

- The Supplier Representatives
- The Requester
- The Buyer if available on the PO; if no buyer, only includes the Requester.

The image below shows a PO cancellation email as seen by the Requester, Buyer and supplier contact(s).

Vroozi Purchase (Requester & Buyer)

CREATE A GOODS RETURN AGAINST AN 'INVOICED' PO

Vroozi will now support the complexity of re-invoicing (rebilling) processes with your suppliers. Users will have the ability to create a Goods Return for an item which has already been 'Invoiced' in the system in order to initiate the re-invoicing process. Previously the option to return items was removed from the Goods Receipt view once the associated PO was in 'Invoiced' status.

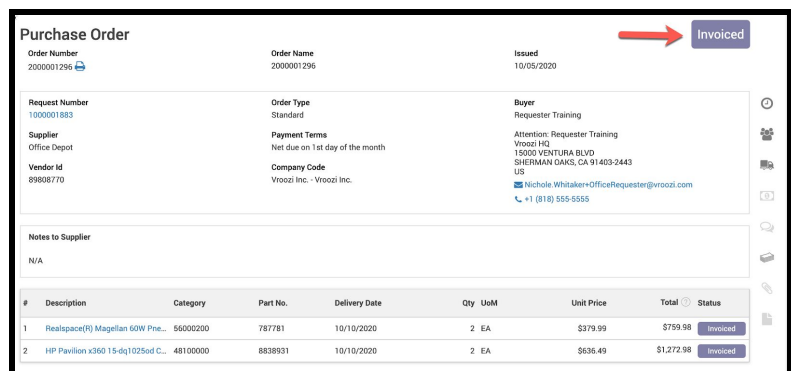
(See the [Vroozi Invoice \(Administrator\)](#) section for configuration details)

Workflow

When a PO is allowed to be reopened post invoicing by Requesters/Buyers the Goods Receipt status will either be, 'Confirmed', 'Shipped' or 'Ordered'. The change of status from 'Invoiced' back to one of these

statuses opens the PO for returns and then if necessary receiving. When a Goods Return is created for the item(s), the PO and Goods Receipt statuses will change back to the status they retained prior to the Goods Return creation; 'Confirmed', 'Shipped' or 'Ordered'.

In the example on the next page, the PO and Goods Receipt status changed back to 'Confirmed' once the return was documented in the system.



Purchase Order

Order Number: 2000001296

Order Name: 2000001296

Issued: 10/05/2020

Request Number: 1000001883

Order Type: Standard

Buyer: Requester Training

Supplier: Office Depot

Payment Terms: Net due on 1st day of the month

Attention: Requester Training

Vendor Id: 89808770

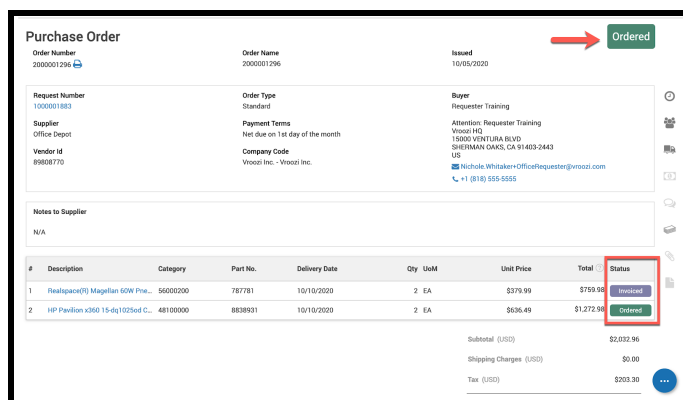
Company Code: Vroozi Inc. - Vroozi Inc.

Address: Vroozi HQ, 15000 VENTURA BLVD, SHERMAN OAKS, CA 91403-2443, US

Contact: Nichole.Whitaker@OfficeRequester@vroozi.com, +1 (818) 555-5555

Notes to Supplier: N/A

#	Description	Category	Part No.	Delivery Date	Qty	UoM	Unit Price	Total	Status
1	RealSpace(R) Magellan 60W Pre...	56000200	787781	10/10/2020	2	EA	\$379.99	\$759.98	Invoiced
2	HP Pavilion x360 15-dq1025sd C...	48100000	8838931	10/10/2020	2	EA	\$636.49	\$1,272.98	Invoiced



Purchase Order

Order Number: 2000001296

Order Name: 2000001296

Issued: 10/05/2020

Request Number: 1000001883

Order Type: Standard

Buyer: Requester Training

Supplier: Office Depot

Payment Terms: Net due on 1st day of the month

Attention: Requester Training

Vendor Id: 89808770

Company Code: Vroozi Inc. - Vroozi Inc.

Address: Vroozi HQ, 15000 VENTURA BLVD, SHERMAN OAKS, CA 91403-2443, US

Contact: Nichole.Whitaker@OfficeRequester@vroozi.com, +1 (818) 555-5555

Notes to Supplier: N/A

#	Description	Category	Part No.	Delivery Date	Qty	UoM	Unit Price	Total	Status
1	RealSpace(R) Magellan 60W Pre...	56000200	787781	10/10/2020	2	EA	\$379.99	\$759.98	Invoiced
2	HP Pavilion x360 15-dq1025sd C...	48100000	8838931	10/10/2020	2	EA	\$636.49	\$1,272.98	Ordered

Subtotal (USD): \$2,032.96

Shipping Charges (USD): \$0.00

Tax (USD): \$203.30

The change in PO status allows your Accounts Payable team to create an Invoice against the PO in the event the supplier sends an updated invoice per their return/exchange process.

When or if the returned/replaced, PO items are again received, the Requester/Buyer has the ability to again confirm receipt of goods for the items in 'Ordered' status. As shown on the previous page, the PO view will again display the options to 'Create Receipt' or 'Close for Receiving'.

Requesters should select 'Close for receiving' if the items returned post invoice will never be replaced by the supplier.

#	Description	Category	Part No.	Delivery Date	Qty	UoM	Unit Price	Total	Status
1	RealSpace(R) Magellan 60W Pre...	56000200	787781	10/10/2020	2	EA	\$379.99	\$759.98	Invoiced
2	HP Pavilion x360 15-dq1025od C...	48100000	8838931	10/10/2020	2	EA	\$636.49	\$1,272.98	Ordered
Subtotal (USD)								\$2,032.96	
Shipping Charges (USD)									
Tax (USD)									
Total (USD)								\$2,032.96	

Supplier Portal Workflows

The functionality described above also applies to customer organizations using the Vroozi *Supplier Portal*. The only differences apply to the statuses that a PO may return to when an 'Invoiced' PO is opened back up for receiving. Since the complexity of the supplier portal allows for increased communication on PO status, in addition to 'Ordered' the PO may return to several other statuses.

- If the line-item was *shipped* by the Supplier to the Requester, the line-item transitions to 'Shipped' status.
- If the line-item was *not shipped* by the Supplier but it was *confirmed or partially confirmed*, the line-item transitions to 'Confirmed' or 'Partially Confirmed' status, respectively.

NOTES TO SUPPLIER ON A PO CR

When making a change to a PO via a PO CR users will now have the ability to communicate additional details with the supplier via a new "Notes to Supplier" field. Use of this feature does not require any configuration as it is now a standard field in the PO CR document header; found directly

#	Description	Supplier	Qty	UoM	Category	Part No.	Unit Price	Delivery Date	Total	Status	Action
1	Inspiron 11 3000 Se...	Office Supply Inc	1	EA	48100000	2485229	\$379.99	11/24/2020	\$379.99	Ordered	View Edit
2	Inspiron 11 3000 Se...	Office Supply Inc	1	EA	48100000	2485229	\$379.99	11/24/2020	\$379.99	Ordered	View Edit

[Add Line Item](#)
[Add Attachment](#)
[Apply to All](#)

Total Amount Added: \$0.00 USD

Notes for Approver:

Reason for Request:


Notes to Supplier:

Please Note that the shipping address for line item #2 has been changed from a California to a Texas location. Thank you!

[Cancel](#) [Submit](#)

below the 'Approver Notes' field. *(shown on previous page)*

'Notes to Supplier' will be included in the PO email notification sent to the supplier. With the intended audience now in receipt of the message, 'Notes to Supplier' is renamed to 'Notes from Buyer.'



The following PO was sent to Office
Supply Inc:
2000001311

11/24/2020 <small>REQUESTED DELIVERY</small>	2 <small>ITEMS</small>	\$835.98 <small>TOTAL</small>
--	----------------------------------	---

Company : Vroozi, Inc. Issue Date: 11/10/2020 Order Type : Standard	Buyer Name : Natalie Smith Buyer Phone : - Buyer Email :
---	--


Notes from Buyer:
Please Note that the shipping address for line item #2 has been changed from a California to a Texas location. Thank you!

The 'Notes from Buyer' will also be visible on the PDF copy of the PO which is attached to every emailed PO notification.

Notes from Buyer:
Please Note that the shipping address for line item #2 has been changed from a California to a Texas location. Thank you!

Item#	Description	Part No	Delivery Date	UoM	Qty	Unit Price	Total
1	Inspiron 11 3000 Series 2-in-1	2485229	11/24/20	EA	1	\$379.99 USD	\$379.99 USD

For customer organizations also leveraging the *Vroozi Supplier Portal*, their suppliers will see the PO email notification from their homepage under 'Tasks'. *(shown below)*









Orders
4 Total

Shipping
1 Total

Pending Invoices
12 Total

TASKS

User	Id	Amount	Date	Notes	Status	Actions
	2000001311	\$759.98	11/10/2020	Please Note that the shipping address for line item #2 has been...	Ready	 
	2000001301	\$898.00	10/19/2020	2000001301	Partially Confirmed	 

Suppliers will also see the message from the PO view.

Purchase Order

Order Number

2000001311

Version

2

Order Name

2000001311

Issued

11/09/2020

Ready

Order Type

Standard

Payment Terms

Net 60 Days

Buyer

Natalie Smith
 Attention: Requester Training
 Vrooz HQ
 15000 VENTURA BLVD
 SHERMAN OAKS, CA 91403-2443
 US
 Email: Natalie@vrooz.com
 Phone: +1 (818) 555-5555

Notes to Supplier

Please Note that the shipping address for line item #2 has been changed from a California to a Texas location. Thank you!
 Show more

- The Notes to Supplier has been updated
- Item 2 has been updated.

#	Description	Category	Part No.	Delivery Date	Qty	UoM	Unit Price	Total	Status
1	Inspiron 11 3000 Series 2-in-1	48100000	2485229	11/24/2020	1	EA	\$379.99	\$379.99	Ready
2	Inspiron 11 3000 Series 2-in-1	48100000	2485229	11/24/2020	1	EA	\$379.99	\$379.99	Ready

Vroozi Invoice (Administrator)

INTRODUCTION OF REINVOICING SETTINGS

To enable the re invoicing process in your system, new settings in the administrator panel will allow POs that have already been invoiced to be re-opened when a Credit Memo is created against that PO.

The most frequent use case is a supplier who as part of the *return to replacement* process, re-bills for the applicable items. Without these configurations, pre-deployment of this new functionality, when the credit was applied and a second supplier invoice was sent, that second invoice from the rebilled items or services, could not be reflected in Vroozi. Instead requiring that the invoice directly post to each customer's financial system or the invoice was treated as Non-PO based invoice.

Configuration

Access the 'Memo Reinvoicing Settings' from *Accounts Payable -> Settings -> Preferences*.

1. Within this field, checking the box next to each setting adds that option to the AP Processor view on the Memo draft.

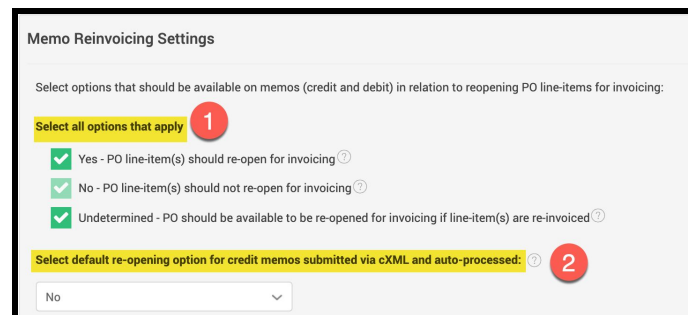
✓ **Yes:** Creation of the emoe reopens the PO for rebilling.

✓ **No:** The Invoice will work as it previously had and the invoice once posted cannot be reopened. This is a default setting selection cannot be toggled off because it's default.

✓ **Undetermined:** Selection by the AP Processor will not immediately open the PO. Instead it will keep the reopening the PO a *possibility* after the invoice has been posted. This is best when an AP Processor processing the memo is uncertain if a PO will be reinvoiced in the future.

2. **Select default reopening option for credit memos submitted via cXML and auto-processed.**

- Simply select *yes* or *no* based on how often your organization will use this feature.



View on Memo draft when **all** settings are selected:

Credit Memo 9500000143

Original Invoice and/or Purchase Order
Enter the original Invoice # and/or PO # pertinent to this memo and link them to this document

Original Invoice # 9000000667 Original PO # 2000001305

Should the PO be re-opened for invoicing? *

Yes No Undetermined

For customer organizations who choose not to use the Rebilling process, administrators should leave the 'Memo Re-invoicing Settings' at default. (shown below)

Memo Re-invoicing Settings

Select options that should be available on memos (credit and debit) in relation to reopening PO line-items for invoicing:

Select all options that apply

☐ Yes - PO line-item(s) should re-open for invoicing

☒ No - PO line-item(s) should not re-open for invoicing

☐ Undetermined - PO should be available to be re-opened for invoicing if line-item(s) are re-invoiced

Select default re-opening option for credit memos submitted via cXML and auto-processed:

No

Default settings as they appear on the Memo draft:

Credit Memo 9500000142

Original Invoice and/or Purchase Order
Enter the original Invoice # and/or PO # pertinent to this memo and link them to this document

Original Invoice # N/A (9000000669) Original PO # 2000001307

PO line-item(s) will not re-open for invoicing

Workflow

Once a credit memo is created and linked to a PO or Invoice, the settings for re-opening can be viewed directly below the linked documents. Example below is an example of a buying organization that via the configurations has elected not to use the re-opening of the invoice tool.

Credit Memo 9500000147

Created on 11/19/2020

Linked Invoice and/or Purchase Order
Original Invoice # - Original PO # 2000001285

PO line-item(s) will re-open for invoicing

Memo Overview
The Supplier and Payment information for this Memo

Company Code: Viroal Inc. - Viroal Inc. Supplier: S213000001 - Office Supply Inc. Supplier Memo #: 3424222 Memo Date: 11/19/2020

Posted Date: 11/19/2020 Reason: Returned Items Notes About Memo: -

Memo Items & Totals
The memo item details and totals for this Memo

Currency: USD

PO # 2000001285

#	Description	GL Account	Price	Qty	Tax	Total	Actions
1	Ingram 15 3000 Series	0000010001 - Equipment	\$ 299.00	1	209.30	\$ 299.00	
						Subtotal (USD)	\$ 299.00
						Discount (USD)	\$0.00
						Shipping Charges (USD)	\$0.00
						Tax (USD)	\$ 209.30
						Memo Total (USD)	\$ 508.30

In the scenario below demonstrates how the re-opening of a PO has been allowed. The Supplier's Invoice for the re-billed item can be referenced back to the PO. The invoice can then be keyed in as normal. Previously invoiced items can still be viewed by selecting 'Show invoiced items' above the line items in the right corner.

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
2000001280	Natalie Smith (Requester)	\$1,704.30

Is this a Final Invoice?

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 *
90000006588	11/10/2020	Net 60 Days
Payment Due Date *	Notes About Invoice	
01/09/2021	Enter a note	

Supplier Notes
Re-billing of returned and replaced laptop

Invoice Items & Totals
Enter the invoice item details and totals from your Invoice

Currency *
USD - US Dollar

PO # 2000001280 Show Invoiced Items

#	Description	GL Account	Price	Qty	Tax	Total	Actions
1	Inspiron 15 3000 Series	0000010001 - Equipment	\$299.00	1	0.00	\$299.00	<input type="button" value="✓"/> <input type="button" value="✕"/> <input type="button" value="📄"/>

Supplier Portal Workflow

Suppliers in the *Vroozi Supplier Portal* the 'Flip to Invoice' option will not be available on POs opened back up for rebilling. Instead they need to select 'Create Invoice' and link to the PO. Once this has been done, the Invoice line items will only display the items reflected in the Credit Memo.

Above the line item description an 'Acknowledgement of Changes' message indicates that items from the linked PO have previously been Invoiced. To proceed forward, the supplier user must select 'Acknowledge Change'.

To view specific details of the proceeding invoice, users can click the carrot below the Acknowledgement button. *(next page)*

Invoice 9000000672 Created on 11/10/2020

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
2000001280	Natalie Smith (Requester)	\$1,704.30

Is this a Final Invoice?

Invoice Overview
Enter the Payment Information for this Invoice

Supplier Invoice # *	Invoice Date *	Payment Terms *
Enter supplier invoice #	MM/DD/YYYY	Net 60 Days
Payment Due Date *	Notes to AP	
MM/DD/YYYY	Enter a note	

Invoice Items & Totals
Enter the invoice item details and totals from your Invoice

Currency *
USD - US Dollar

PO # 2000001280

• The associated Purchase Order has been updated by the buyer. In order to proceed with this invoice, please acknowledge all the changes made to the items in this Invoice.

• Item 1 has been updated.

#	Description	Price	Qty	Tax	Total	Actions
1	Inspiron 15 3000 Series	\$299.00	1	0.00	\$299.00	<input type="button" value="✓"/> <input type="button" value="✕"/> <input type="button" value="📄"/>

(All changes saved a few seconds ago...)

PO # 2000001280

The associated Purchase Order has been updated by the buyer. In order to proceed with this Invoice, please acknowledge all the changes made to the items in this Invoice. [Acknowledge Changes](#)

[Hide invoiced items](#)

Note: following items are referenced by other Invoices linked to the same PO. You may choose to add any of these to your Invoice.

Invoice	#	Description	Price	Qty	Tax	Total	Actions
<input type="checkbox"/>	9000000633	1 Inspiron 15 3000 Series	\$299.00	5	0.00	\$1,495.00	v +

Item 1 has been updated.

#	Description	Price	Qty	Tax	Total	Actions
<input type="checkbox"/>	1 Inspiron 15 3000 Series	\$299.00	1	0.00	\$299.00	v p c d

Once 'Acknowledge Changes' is selected, the warning message will disappear. The invoiced items can still be viewed by selecting 'Show invoiced items'. (shown below) The invoice line items should then be edited to reflect only the re-billed items.

Invoice Items & Totals

Enter the invoice item details and totals from your Invoice

Currency: [USD - US Dollar](#)

PO # 2000001280 [Show invoiced items](#)

#	Description	Price	Qty	Tax	Total	Actions
<input type="checkbox"/>	1 Inspiron 15 3000 Series	\$299.00	1	0.00	\$299.00	v p c d

[Delete Item\(s\)](#)

Vroozzi Invoice (AP Processor)

INTRODUCTION OF 'COPY' FEATURE AT THE INVOICE LINE ITEM



To improve the speed of manually indexing a Non-PO invoice, the 'Copy Line Item' feature has now been added to the Invoice draft. Similar to the existing 'Copy' functionality at the Requisition level, AP users can copy an existing line item on an Invoice.

As a user who is able to edit Invoice, Memo or Payment Request, Vroozzi is now able to copy existing item(s) so that if you enter similar items more quickly. This will copy the items DNA data but it will not associate it to any existing Purchase Order.

PO # 2000001307

#	Description	GL Account	Price	Qty	Tax	Total	Actions
<input type="checkbox"/>	1 Dell SE2717HX RVJXC 27" Full HD 1920 X 1080 Monitor	0000010001 - Equipment	\$149.99	10	149.99	\$1,499.90	v p c d

[Apply to All](#) [Delete Item\(s\)](#)

1

1. Click the 'Copy' icon.
2. When selected, the system will prompt review of the duplicated line item. From here edits can be made. (next page)

PO # 2000001307

#	Description	GL Account	Price	Qty	Tax	Total	Actions
1	Dell SE2717HX RVJXC 27" Full HD 1920 X 1080 Monitor	0000010001 - Equipment	\$149.99	10	149.99	\$1,499.90	

[Apply to All](#) [Delete Item\(s\)](#)

Non PO

Please enter your invoice item #1 details below

General Information

Shipping Address: Vrooz HQ, 15000 VENTURA BLVD., SHERMAN OAKS, CA 91403-2443 US

Type: Product

Description: Dell SE2717HX RVJXC 27" Full HD 11

Price: \$149.99

Quantity: 10

Category: 44120000 - Office supplies and equi

Tax Code: TX100 - Tax code

Discount: \$0.00

Shipping Charges: \$0.00

Tax: \$149.99

UoM: EA - EA

Company Code: Vrooz Inc. - Vrooz Inc.

Plant: Vrooz Inc. - Vrooz Inc.

Accounting

[Add Item](#) [Apply to All](#) [Delete Item\(s\)](#)

- Once the new line item is saved to the Invoice 'Draft' it will be displayed under the Non-PO header. If a new line item is added to a *PO based invoice* Processors will receive a warning that must be cleared before indexing can be complete.

Total (USD) \$1,649.89

Non PO

Additional Line Item Alert - Line Item #1
Line item not present on PO [Within Tolerance]

[Clear Alert](#)

#	Description	GL Account	Price	Qty	Tax	Total	Actions
1	Dell SE2717HX RVJXC 27" Full HD 1920 X 1080 Monitor Copy	0000010001 - Equipment	\$149.99	10	149.99	\$1,499.90	

[Add Item](#) [Apply to All](#) [Delete Item\(s\)](#)

The Invoice total will update to include the value of the newly added items.

Non PO

#	Description	GL Account	Price	Qty	Tax	Total	Actions
1	Dell SE2717HX RVJXC 27" Full HD 1920 X 1080 Monitor Copy	0000010001 - Equipment	\$149.99	10	149.99	\$1,499.90	

[Add Item](#) [Apply to All](#) [Delete Item\(s\)](#)

Subtotal (USD)	\$1,499.90
Discount (USD)	\$0.00
Shipping Charges (USD)	\$0.00
Tax (USD)	\$149.99
Total (USD)	\$1,649.89

Invoice Totals

Subtotal (USD)	\$2,999.80
Discount (USD)	Value <input type="text" value="\$0.00"/>
Calc. Discount (USD)	\$0.00
Shipping Charges (USD)	\$0.00
Tax (USD) *	\$299.98 (Estimated Tax: \$299.98)
Invoice Total (USD) *	\$3,299.78

Bug Fixes

- ✓ The PR Bulk Upload file will no longer pick up the same price for any 'Price Editable' items in the Requisition with the same item_id, instead the appropriate price will again be recognized for each item during the upload.
- ✓ The Supplier record is now appropriately being 'Activated' or 'Deactivated' on the screen when that designation is selected by an administrator *without* having to refresh your page.