Vroozi Purchase Requester Guide

An employee with the Requester role will have the ability to initiate the procurement process through the creation of a requisition. That requisition once it passes any applicable approval processes will convert into a Purchase Order, a formal document sent to the supplier(s) requesting the listed goods and/or services.

As part of their role, Requesters may also be required to complete a Goods Receipt, resolve exceptions related to their Purchase Orders and document the details of a return.

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Procurement Documents 101

Purchase Requisition (PR):

- Often referred to as a *Request*
- Initiates the Purchase Process
- Document generated by a user to notify internal stakeholders of items or services needed.

Purchase Order (PO):

- Notifies a supplier of a procurement request
- Document generated against a Purchase Requisition after an approval process.

Goods Receipt (GR):

- Document issued to acknowledge the receipt of the items listed in a Purchase Order
    - Service receipts can be created to confirm the completion of requested services.

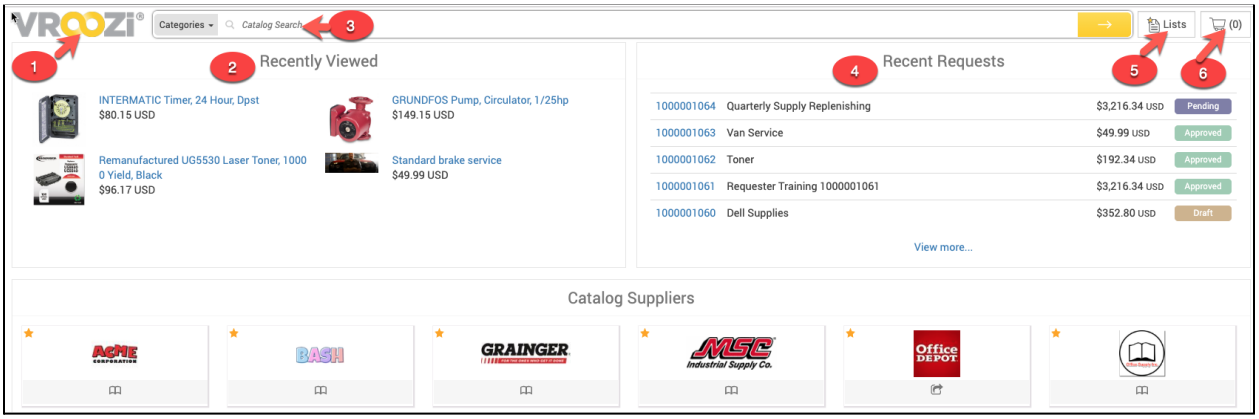
Advanced Shipment Notice (ASN):

- Document initiated by suppliers via the Vroozi Supplier portal notifying Requesters of the shipment details for items contained in their PO. (only applicable for buying organizations using the Supplier Portal)

Invoice:

- Initiates payment for goods/services received against a PO.

Homepage Anatomy



1. **Your Logo**: Essentially your "Home" button. From any screen in Vroozi Purchase, , clicking your logo returns you to the homepage.

2. **Recently Viewed**: A history of recently viewed *Internal Catalog* items, click to view the item detail.

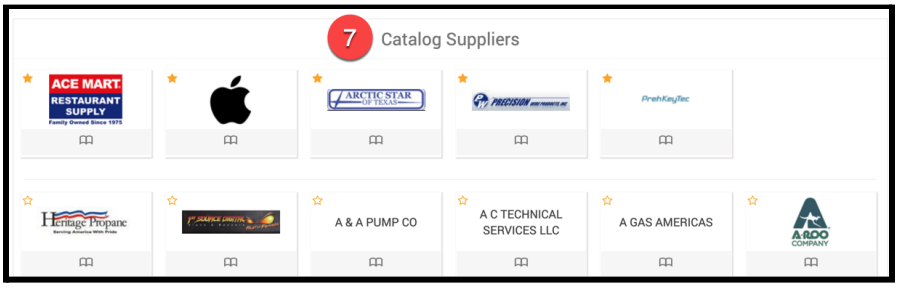
3. **Search Bar with Categories Menu**: Where to search for internal catalog items by keyword(s) or other product identifiers such as SKU, Manufacturing Number, Part Number etc.

    - Allows you to narrow your search to specific categories when searching for *Internal Catalog* items. Used in combination with the *Search Bar*.

4. **Recent Requests**: The 5 most recent requisitions you have submitted. Status' shown to the right of each document number.

5. **Lists**: Create personalized lists of frequently requested items from *Internal Catalogs*. Lists can be saved and applied to future requests.

6. **Shopping Cart**: A "holding area" for catalog items that can be placed into an existing requisition draft or converted into a new request.

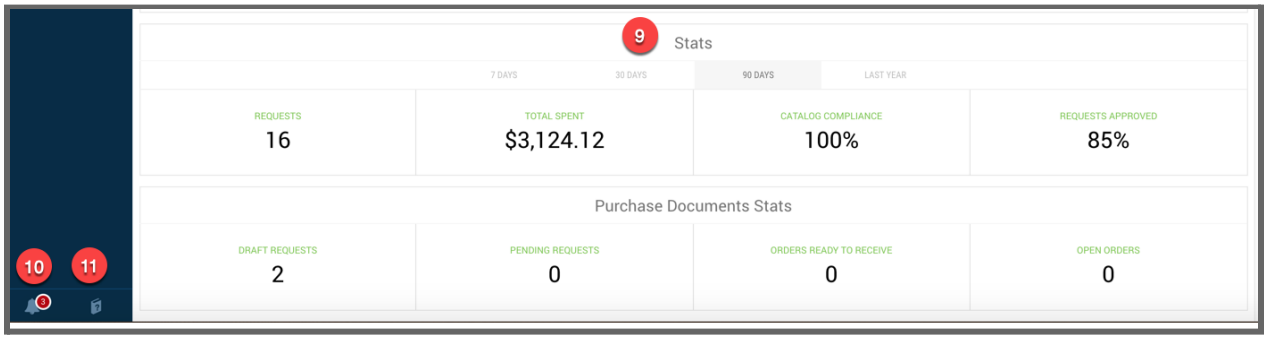


7. **Catalog Suppliers**: A list of all approved catalogs for your organizational group based on regional availability. This may include both *Internal* and *Punchout* suppliers. (shown on previous page)

8. **Purchase Document Stats**: Statistics reflecting the shopper's personal purchasing date.

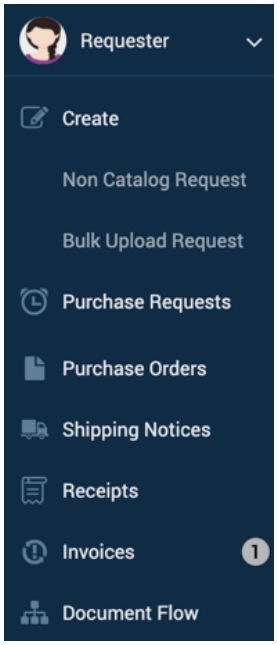
9. **Notifications (Bell Icon)**: View *Administrator* messages.

10. **Help (Book Icon)**: Access to 'The Vroozi Success Forum' which includes the self-help knowledge base and the ability to submit a request to the *Vroozi Helpdesk*.



See Setup Requirements Guide for further navigation details.

Navigation Panel



Your First Name and Initials: The drop-down menu here reveals your *Profile*, *My Data*, as well as the *Logout* icon.

Create: Click Free Text to create a non-catalog requisition.

Purchase Requests: Where to check the status of your request; a history of your requests.

Purchase Orders:: Where to check the status of your *PO*; a history of *Approved Requests* that have associated *PO Document Numbers*.

Shipping Notices: View Supplier Shipment Notifications

*Only applicable for Supplier Portal customers

Receipts: Where to create *Goods Receipts* and returns.

Invoices: Number badge next to this category indicates your Action is Required to resolve Invoices sent back for completion of a missing Goods Receipt.

Document Flow: Where to look up and view the status and associated records for any type of document. This feature also provides a visual diagram representation of how *Related Documents* are interconnected with each other.

Catalog Shopping

In *Vroozi Purchase*, requesters are able to create both *Catalog* and *Non-Catalog* requisitions.

Types of Requisitions

1. **Catalog Requests:** include both searchable Internal Catalogs and Punchout Catalogs. Your organization has granted you catalog access based on organizational function and in some cases region.
2. **Non-Catalog Requests:** pertain to Free Text line items for vendor products or services that are not available in the catalogs.

A single requisition may contain line items from multiple suppliers. In this case, multiple POs will be created from a single request. Any combination of goods and services, as well as Catalog and Non-Catalog line items can also share the same Request Name and Request Number.

Cart vs. Requisition

The *Cart* and *Request* creation functionalities are two separate but related functions of *Vroozi Purchase*. The following section describes the differences between the two processes.

Cart: The first document created in the purchasing process for *Catalog* purchases. Just like a physical shopping cart, this is a document that holds all of the items you would like to order until you are ready to check out.

1. You can add, remove, or edit the quantities of the items you have selected.
2. Once you are ready to check out, or submit your request, just click on 'Move to Request' or select an existing request, where you can review it and submit for approval.

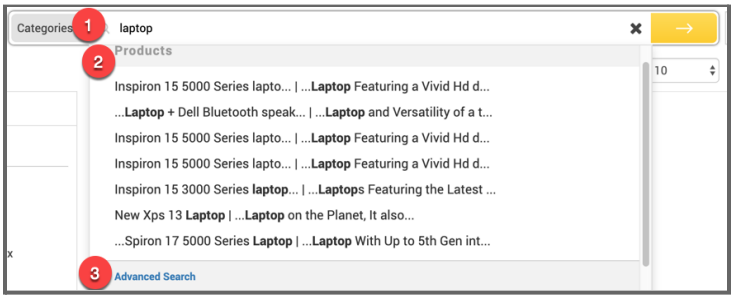
Request: Contains all of the information necessary for an order to be submitted and fulfilled by the supplier(s). Prior to submission, you can add, remove, or edit the items you have created or selected. Once the submitted request is approved, it becomes the final document that will be sent for approval and will ultimately be what the *Purchase Order* is based on.

Internal Catalogs

Internal Catalogs are those that are uploaded by your organization into *Vroozi Purchase*. The search bar allows you to search across multiple vendors. It does not allow you to specifically search across items in one catalog, but you may use the vendor filtering function after you have executed the search.

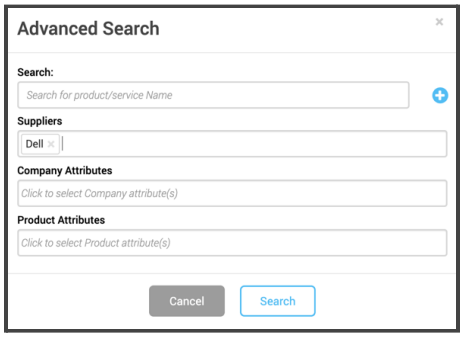
Internal Catalog Search Options

There are several ways to search for items or services. (This searching does not include Punchout catalog inventory.)



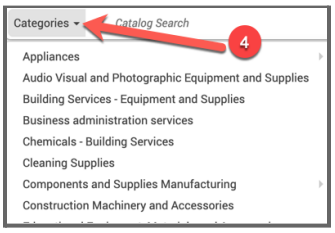
Search by specific details or keywords

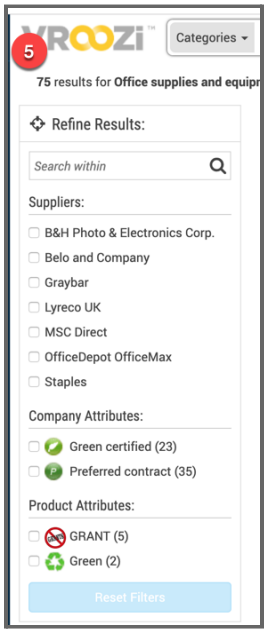
1. Submit basic search
2. Select quick reference options
3. Select 'Advanced Search'



Search by Category

4. Select from preloaded list of categories
5. View results for suppliers with products or services mapped to that category. You may refine search results from here by selecting specific suppliers, company attributes or searching by keyword. (shown on next page)

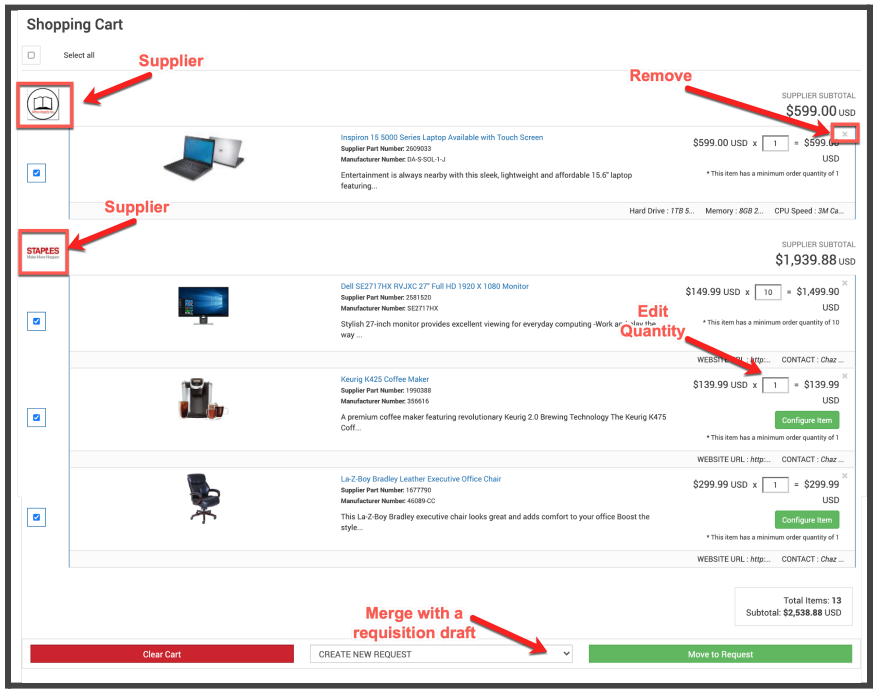




Note: *The search can be a specific item ID (NON026330) or a keyword, like "gloves" or "Swingline Stapler." This will search across all Internal Catalog vendors for available items.*

Create a Requisition from an Internal Catalog(s)

1. Click '*Add to Cart*'. The item will be added to *Cart*.
2. Repeat the search process (steps 1-3) until all desired items are added.
3. Once you have added all of your items, click the *Cart* icon at the top right of the



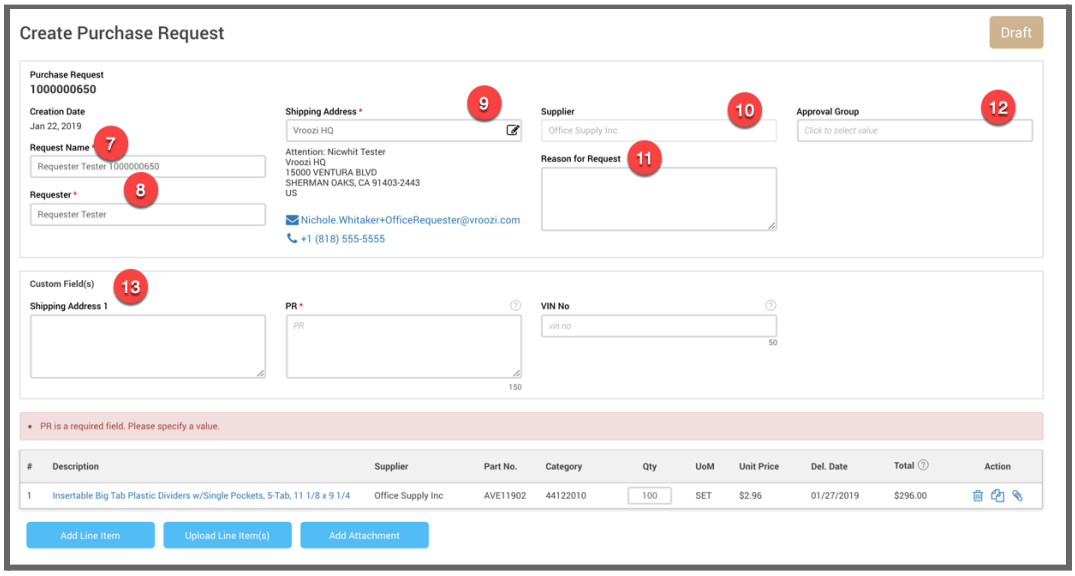
screen. The cart view will display all items in your *Cart*, organized by the vendor.

4. At the cart, you will see all items divided by supplier. From the cart you may still delete items or edit the quantity. Items will remain in your cart for the remainder of your shopping session. Logging out will remove cart items.
    - Your organization may not allow for multiple suppliers in a Requisition or have specific suppliers that cannot be combined in a Requisition.

5. Once you are ready to convert your cart to a requisition you have 2 options; items can either be added to an existing requisition in 'Draft' status (shown above) or created in a new requisition by selecting 'Move to Request'. (also shown above)
    - To add cart items to an existing draft: use the drop-down menu to select from requisitions in draft status.

6. Click 'Move to Request'. You will be redirected to the Create Purchase Request screen.

7. The *Request Name* is defaulted to your name plus the *Request Number*—it is optional, but recommended, to rename this request to something more recognizable.



8. Request Name: Defaults to the shopper's name and the Request Number—it is optional, but recommended, to input more specific information about the request, i.e. "monthly office supply order," a project reference, or vendor name(s).

9. Requester: Defaults to the shopper's name. If buying on behalf of someone else, the actual requester's name should be entered. Approvers will be able to see that you have placed the Request on that person's behalf.

10. Shipping Address: Verify details. See the Change Shipping Address section for more information on how to change the address.

11. Supplier(s): Name listed. Field is not editable.

12. Reason for Request: Optional Field

13. Approval Group: Select (if applicable)

14. Custom Fields: Custom data fields may be set up by the Purchase Administrator(s) and set at either optional or required.

15. Missing Information: Customized message identifying any required information that is missing either in the line item description or the purchase request fields above.

16. Line Item Overview: Review the contents of the request. Catalog-only requests usually have all of the required information defaulted, so typically no additional data needs to be entered by line item.

17. Approval or Supplier Notes: Input any notes for the approver or supplier. This is optional.

18. Delete, Save or Submit the requisition.

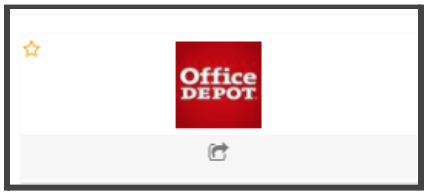
19. You will receive a "request submitted" notification at the top of the screen (not pictured). Once approved, you will receive a confirmation email.

Punchout Catalogs

Punchout Catalogs, like *Internal Catalogs* can be used to add items to the cart or request. When using *Punchouts*, you are redirected away from *Vroozi Purchase* to the vendor website to search and select items. The instructions below show how to recognize a *Punchout* catalog, as well as how to use it to add items to the cart and proceed to request submission. Keep in mind that a supplier can be both a *Punchout* as well as an *Internal Catalog* within *Vroozi Purchase*.

Create a Punchout Catalog Requisition

1. From the *Homepage*, locate the *Punchout Catalog* under the *Catalog Supplier* area.



2. Look at the supplier to reveal an arrow icon, indicating the catalog is a Punchout catalog. If the supplier only displays a book icon, then it is an *Internal Catalog*.

3. Click on the arrow icon of the *Punchout* catalog supplier. A new window will pop up.

> **Note:** You may need to disable pop-up blockers depending on your browser settings.

4. Search for items in the vendor website and add them to the cart. Each supplier environment is different and will have varying features and functionalities. (not pictured)

5. Checkout of the vendor website by clicking the “submit” or “transfer your order”-type button. The exact wording of the function varies by vendor. (not pictured) Your items from the Punchout will be pulled into your Cart in Vroozi Purchase.

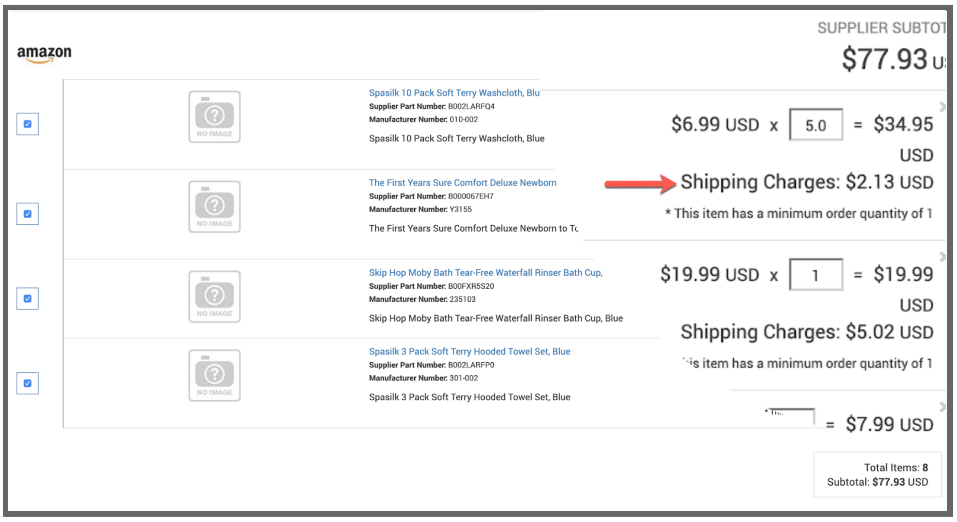
6. Once you have returned the items to your Vroozi cart the process to convert the cart to a Requisition will be the same as the steps outlined in the previous section covering internal catalogs.

    - Items returning to your Vroozi cart from a punchout catalog will not include the product/service image.

Shipping Charges Carry over for cXML Punchout Catalogs

Shipping charges can be captured from a punchout supplier’s catalog allowing shoppers to capture actual spend on Punchout Catalog items.

The shipping charges will be added to the Vroozi shopping cart and then transferred to the Purchase Request and all subsequent related documents thereafter.



Note: This only applies to all cXML punchout catalogs and the shipping charges must be included from the supplier.

Product or Service Free Text Requisitions

Create a requisition for items or services that are **not** available in the *Vroozi Purchase* catalogs. Requesters wishing to create a free text requisition should confirm with their supervisor/administrator that the supplier they wish to use has been added to the Vroozi system, as this will be required before the requisition can be completed.

Create a Free Text Requisition

1. From the Homepage, click 'Free Text under the 'Create'; category in the navigation panel.

2. At the requisition draft, the *Request Name* is defaulted to your name plus the *Request Number*—it is optional, but recommended to rename this request to something more recognizable.

3. The *Requester* area defaults to your own name. If you are buying on behalf of someone else, enter their name.

4. Verify the defaulted *Shipping Address*. See the *Change Shipping Address* section for more information on how to change the address.

5. Enter the *Reason for Request*. This is optional.

6. Scroll down to reveal the *Line Item Overview*.

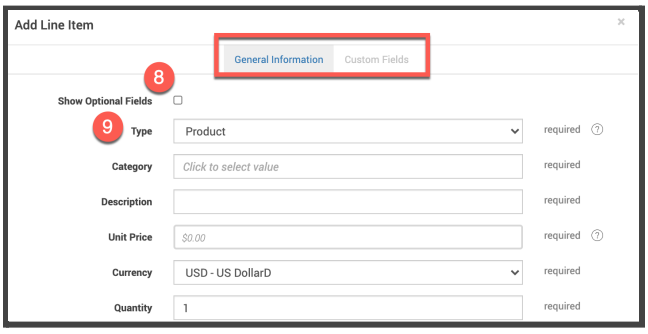
7. Click 'Add Line Item'. The line items details screen will pop up to be completed.

    - Information is divided into 2 tabs; 'General Information' and 'Custom Fields'

        ➢ Custom Fields will contain any custom fields required or optional at the requisition level.

8. The *Show Optional Fields* box can be left unchecked. You have the ability to check this box to reveal additional data such as the line item *Long Text* and *Product ID* fields.

9. Input the required 'General Information'. The exact options may vary based on your organization's protocols and administrative configurations.



Type: The *Line Item Type* is either a *Product*, *Service*, *Blanket* or *Invoice Plan*. You may create mixed service and product requests, but *Blanket* and *Invoice Plan* line items may not be mixed with any other *Type*.

Category: This lists all the preset options for your organization. Start typing in the first digit of the *Category* or *Category* description and make the selection using the drop-down menu. Choose the *Category* that best fits what you are ordering.

Description: Type in the description of the product or service being requested.

Unit/Service Price: Input the value of the product or service, leaving off special characters like "$" and commas. Decimal points are OK.

Currency: This area is defaulted but can be updated if your organization's *Administrator* has configured other *Currency* options for use.

Quantity: The amount of the product or service to be used.

UoM: The unit of measure is defaulted to each (EA) for products, and *Activity Unit* (AU) for *Services*, *Blanket*, and *Invoice Plans*. This drop down can be changed manually if needed.

Recommended Supplier: The supplier you recommend being used—start typing either the *Vendor ID* number or *Vendor Name*. You must make a selection from the drop-down menu, as this area does not accept free text. If you cannot find the supplier you are looking for, contact your company's internal *Vroozi Purchase Administrator* for assistance.

Delivery Date/Service Period: For products, this is defaulted by your organization's *Administrator* for 30 days in the future, which does not need to be changed. For services or *Blanket Requests*, select a *Service Period* using the calendar function. It is OK for the *Date Range* to be an educated guess of when a project or service will be taking place and doesn't have to be perfect.

10. Accounting

Split Account Assignment: Splitting the *Account Assignment* is optional to use when required for the *Request*. Choose how to split your *Account Assignment*—choices include *None*, by *Quantity*, by *Value*, and by *Percent*. If split, the fields will update and require more information based on your selection. See Split Accounting section for further details.

Account Category: This will default to the Cost Object designated by your company's *Administrator*. Your selection will update the following drop-down menu to reflect your choice.

Cost Object: This selection automatically populates to your default *Cost Object* but will vary based on your selection of the *Account Category*. The *Cost Object* drop down can be updated by choosing the options on the drop-down menu.

G/L Account: If this is required by your organization, start typing the first few characters of the *General Ledger Account* number or description to reveal a drop-down list provided by your organization. Make the appropriate selection using the drop-down menu. If you don't know what *GL Account* to choose, contact your finance team.

All of your *Company Info* is defaulted for you but can be updated if needed.

11. Select delivery address. (Requester addresses set by administrator)

12. Update the following required tax information (if needed):
    - **Tax Code**: The *Tax Code* will automatically default, but you are able to make changes when necessary.
    - **Tax Value**: No value needs to be entered in this area. If your instance of Vroozi Purchase is integrated with an external ERP system like SAP, the Tax Value will be calculated there.

13. Click 'Save Item'. Your line item will be saved and reflected in the line item overview.

14. Repeat steps 7-13 until you have all the *Free Text Line Items* you need in the request or use the duplicate function. See the *Duplicate Line Item* section for more information.

15. There may or may not be a notification prompting you to add an attachment at the line item or header level. Click 'Add Attachment' and select a saved file off of your computer as supporting documentation. The system accepts most major file formats up to 100MB each.

16. Input any notes for the *Approver* or *Supplier*. This is optional.

17. 'Submit '.

18. A blue "request submitted" notification appearing in the bottom left corner of the screen will notify of a successfully submitted request. You will receive an email notification of the Requisition status of approval or rejection.

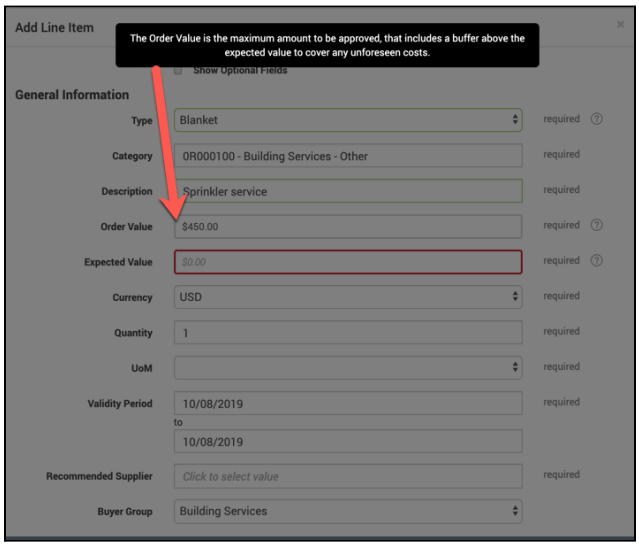
Create a Blanket (Limit) Request

A *Blanket* or *"Limit" Request* is a type *of Non-Catalog Free Text* request that consists of items of services that will be delivered over a period of time. Multiple invoices will be submitted by the supplier against the PO. The PO will remain open until the Order Value has been reached. Blanket POs do not require goods receipt.

1. From the Homepage, click 'Create' on the blue navigation bar to create a Requsition draft.

2. Fill out request details as you would for other requests; Updating defaulted information and fill out incomplete fields. Click 'Add Line Item'. The line item details screen will pop up to be completed.

3. Input the required General Information: Additional details are required for the completion of the Blanket item:
    - Order Value *(see image next page)*
    - Expected Value: must be equal or less than *Order Value*.
    - Validity Period



4. Click 'Save Item'. Your line item will be saved and reflected in the line item overview.

5. There may or may not be a notification prompting you to add an attachment at the line item or header level. Click 'Add Attachment' and select a saved file off of your computer as supporting documentation. The system accepts most major file formats up to 100MB each.

6. Input any notes for the *Approver* or *Supplier*. This is optional.

7. Click 'Submit Request'.

> **Note:** Like Invoice Plans, you may only enter a single Blanket Line item per request, so don't try to add more than one!

Create an Invoice Plan Request (Only applicable for SAP users)

An *Invoice Plan* is an automatic scheduled payment of the same amounts where an invoice is then not required. Payment is automatically sent to the supplier.

- Only compatible with SAP integration.
- Only 1 invoice plan can be added to the requisition..

1. From the Homepage, click the 'Create' category on the blue navigation bar. The Create a Request page will appear.

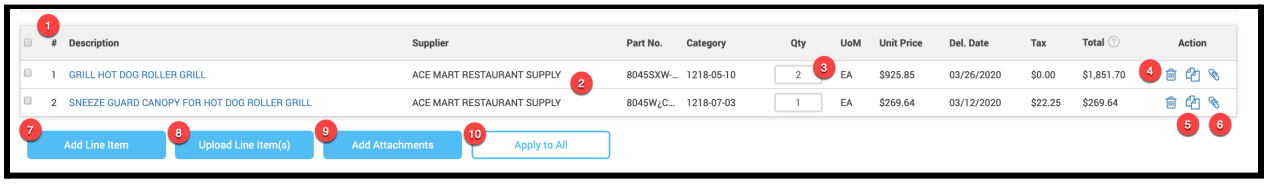
2. Fill out request details as you would for other requests; Updating defaulted information and fill out incomplete fields. Click 'Add Line Item'. The line items details screen will pop up to be completed.

3. Input the required General Information:
4. Click 'Save Item'. Your line item will be saved and reflected in the line item
5. There may or may not be a notification prompting you to add an attachment at the line item or header level. Click 'Add Attachment' and select a saved file off of your computer as supporting documentation. The system accepts most major file formats up to 100MB each.
6. Input any notes for the *Approver* or *Supplier*. This is optional.
7. Click 'Submit Request'.
8. You will receive a "request submitted" notification at the top of the screen (not pictured). Once approved, you will receive a confirmation email.

Modify Request Details

Line Item Functions & Anatomy

1. **Line Item Checkboxes**: Used in correspondence with the Apply to All Function. (see #10 for full description)
2. **Part Number**: Where the Part Number appears for Catalog Items. The Requester is able to manually input the Part Number for Non-Catalog Free Text Request Line Items by clicking into the Line Item Details and updating this information. Part Numbers are required for any Line Item that will be electronically transmitted from Vroozi Purchase to the vendor.



3. **Quantity**: Where the Requester can review and update the Line Item Quantity before Request submission.
4. **Trash Can Icon**: Click the Trash Can to delete a specific Line Item.
5. **Paper Icon**: This is the Duplicate Line Item function.

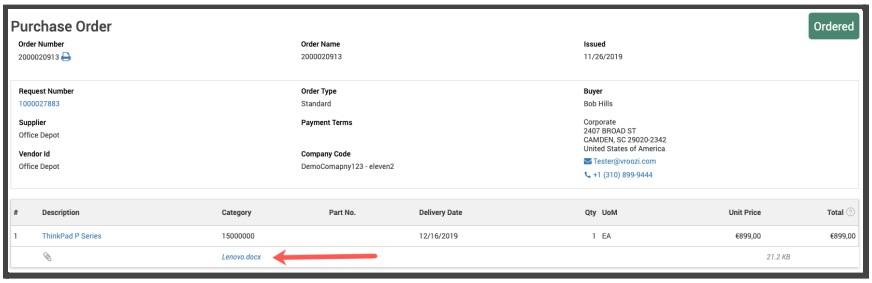
6. **Paperclip Icon**: Use this to add an attachment to a specific Line Item. If adding an attachment for the entire Request, it is recommended to add attachments at the header level. (see #9 for Header Level Attachments)

7. **Add Line Item**: See section on how to add line item.

8. **Upload Line Items**: Requesters can bulk line items by using this function. An item template can be completed instead of searching or creating items manually. See the Item Upload section for more information.

9. **Add Attachment (at the Header Level)**: The 'Add Attachment' button allows users to attach supporting documentation at the Header Level. This is in contrast to the Paperclip Icon, which uploads attachments by individual line item.

    - Purchase Orders will inherit the attachments associated with the approved Requisition and individual line items within the document. Administrators can control if they want these attachments sent with the PO to the applicable Supplier(s).



10. **Apply to All**: Requesters have the ability to apply Line Item Details from one item to other items within the same Request. This includes Accounting and Tax information. See 'Apply to All' section for further details.

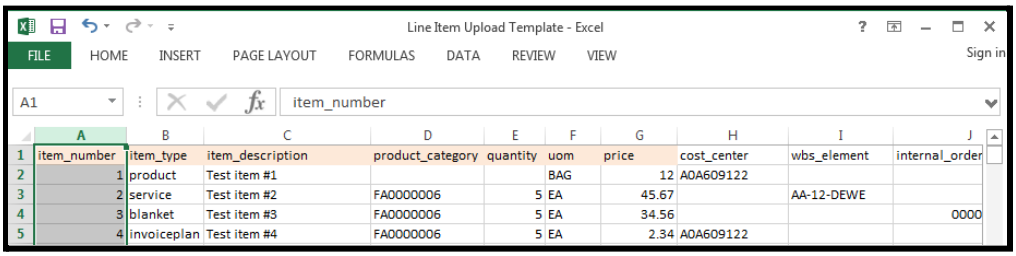
Create a Bulk Item Upload Requisition

Vroozi Purchase allows Requesters to create requisitions using the Bulk Item Upload feature directly from the 'Create' category. This is particularly useful when there is a

Request with several dozens of Line Items, as it is an alternative to creating or searching for Line Items one at a time.

1. Start the process by downloading the Excel *Bulk Item Upload Template* in the Vroozi HelpDesk.

    - Examples of *Line Items* are available on the template, however, make sure to delete these out when preparing your template.



	A	B	C	D	E	F	G	H	I	J
1	item_number	item_type	item_description	product_category	quantity	uom	price	cost_center	wbs_element	internal_order
2	1	product	Test item #1			BAG	12	A0A609122		
3	2	service	Test item #2	FA0000006	5	EA	45.67		AA-12-DEWE	
4	3	blanket	Test item #3	FA0000006	5	EA	34.56			0000
5	4	invoiceplan	Test item #4	FA0000006	5	EA	2.34	A0A609122		

2. Fill out the template information into the spreadsheet and save it to your computer.

3. Once completed, log into *Vroozi Purchase*.

4. Click 'Create' from the blue navigation bar. (not pictured)

5. Review and update the *Purchase Request* information at the top, like *Request Name* and *Shipping Address* if needed.

6. Click 'Upload Line Item(s)'.

7. Follow your computer's prompts to select the *Line Item* template that you completed beforehand. Your *Line Items* will automatically be uploaded.

8. If there is any required information that is missing, the system will provide notifications in **red** of what needs attention. These messages vary. Once the items listed are addressed, continue to step #10.

9. Review your uploaded line items for accuracy.

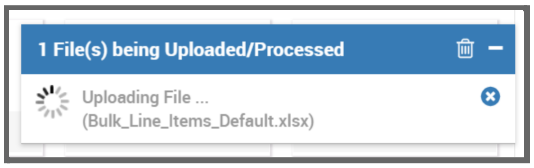
10. Add any *Approver* or *Supplier Notes*. This is optional.

11. Click 'Submit'.

Track Bulk Upload Progress

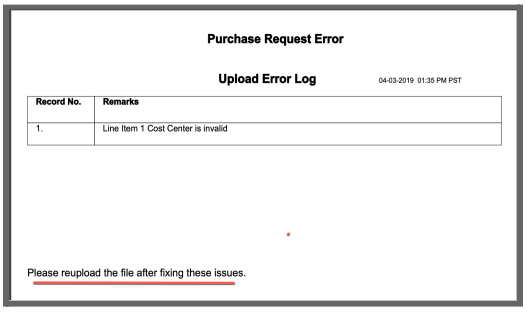
Line item bulk upload files can be uploaded to a PR via the Bulk Upload function or via the standard Create/Edit Purchase Request screen. In either case, the file is

processed synchronously, in the background. Allowing the user to continue utilizing the application regardless of the size of the file being uploaded.



Users will see a new file progress tracker that remains visible to the user no matter which screen they are on, allowing them to monitor the progress of any number of files processing.

The newly updated PR can also be uploaded PR from the tracker. Users will be able to access the newly created or updated PRs from this tracker, as well as any PDF error reports generated by any of their uploaded files.



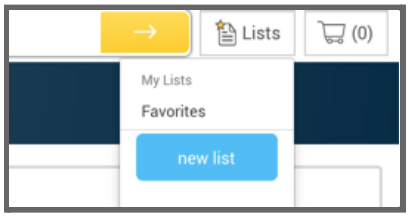
View Errors

If errors occur in the upload, users can click the error message in the tracker to view the PDF error report generated by the system.

Catalog Lists

Catalog Lists are an optional function in *Vroozi Purchase* that help make it fast and easy to add frequently ordered *Internal Catalog* items to a request. If you add the same items to the request on a regular basis, you may want to take the time to create your *List* and utilize this feature. This chapter describes how to create an *Internal Catalog List*, and how to use them to create requisitions.

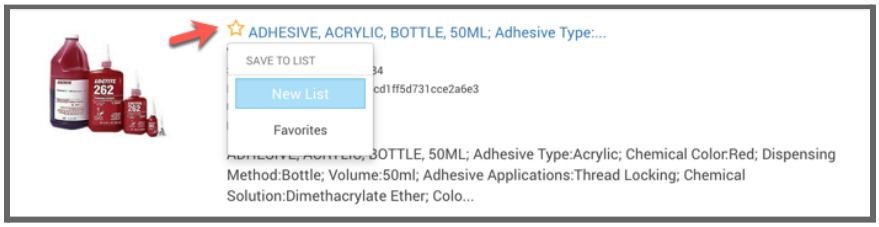
Create a List



1. From the *Homepage*, click 'Lists' to reveal a drop down of previously created lists. (Example below shows a 'Favorites' list) or 'new list' options.
2. Click 'new list'. The new list that you created has a default name of *My List*.
3. You can change the name of your list by simply clicking *My List* text area and typing in the name of your new *List*. (i.e. Office Supplies, Weekly Snack Order, Phone Accessories)
4. Click the blue 'Get started here!' link to add items to your list.

5. Search for the item you would like to add to the list using the *Search Bar*.

6. Click the yellow star icon next to the item description to reveal a drop-down menu.



7. Select the name of the *List* you would like to add it to. The item will be added to your *List*.

8. Repeat steps 6-8 to add more items to the *List*.

Add Line Items to a Request using Lists

If you have not created your list yet, refer to the *Create a Catalog List* section first.

1. From the *Homepage*, click 'Lists' to reveal a drop down of options.

2. Click on the *Name* of the *List* you would like to select items or services from.

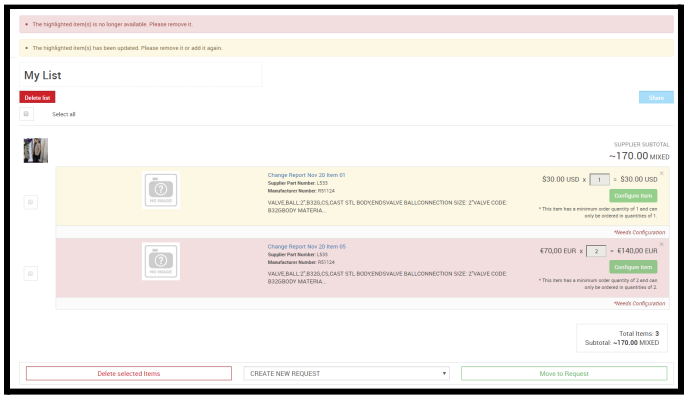
3. Your *List* will be displayed. Here, you have the opportunity to remove or change the item quantities before moving them into a *Request*.

4. After making the necessary amendments, review your subtotal and select whether you would like to *Create a New Request*, or add the items to an existing *Draft Request* using the drop-down menu.

5. Click 'Move to Request'.

List Item Updates

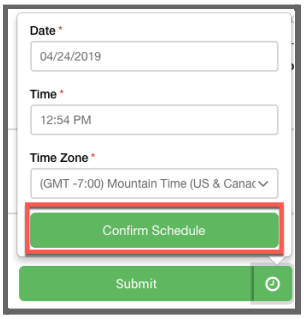
If an item in a Requester's List is updated (via administrator or supplier user update) that item will be highlighted in the favorites list with a message notifying of the update. If the item still exists in the catalog, then the requester must go to the item listing and re-add.



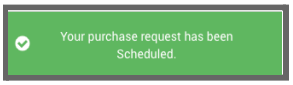
Requisition Creation Tips & Features

Schedule Submission of a PR

If enabled at the administrative level, employees will have the ability to schedule the automatic submission of their Purchase Requests at a date & time in the future. This schedule can be defined for a PR from either bulk upload creation screen or the standard Create/Edit Purchase Request screen.



1. Set Date, Time and Time Zone.
   - Date: Schedule 24 hours to 1 year in advance.
   - Time: Set specific hour and minutes
   - Time Zone: All time zones available
2. Select 'Confirm Schedule'
3. A notification will appear confirming the PR has been successfully scheduled.



4. Based on a defined schedule of a PR, the system will automatically process and submit the PR in the background at the correct time. The requester will receive an email confirmation that the PR has been created & submitted.

Note: If a user does not wish to schedule PR submission they can simply select 'Submit' at the PR creation page to immediately submit.

Duplicate (Copy) A Line Item

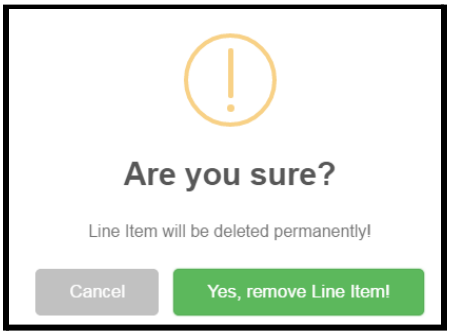
This section describes how to use the duplicate function as an alternative to 'Add Line Item' when adding line items to a request. The copy functionality is applicable for both *Free Text, Non-Catalog* and *Catalog Line Items*. If you would like to start from the request process from the Homepage, refer to additional sections of the *Create a Request* chapter.

1. From the *Create a Request* screen, find the line item you would like to duplicate, and click the copy (paper) icon on the right. Your line item will be duplicated.

2. To update the information like *Description*, *Accounting*, and *Quantity*, click on the linked *Description* of the line item.
3. The *Line Item Detail* screen will open up. Make the necessary changes to the *Line Item*. (not pictured)
4. Click 'Save Item'. (not pictured) Your updates will reflect in the *Line Item Overview* like the example below.

Delete a Line Item

In the *Line Item Overview* area, you have the ability to remove items from the purchase request. This section addresses how to delete a line item from the *Create Purchase Request* screen, after line items have already been selected or created. If you would like to start the request process from the Homepage, refer to prior sections of the *Create a Request* chapter.

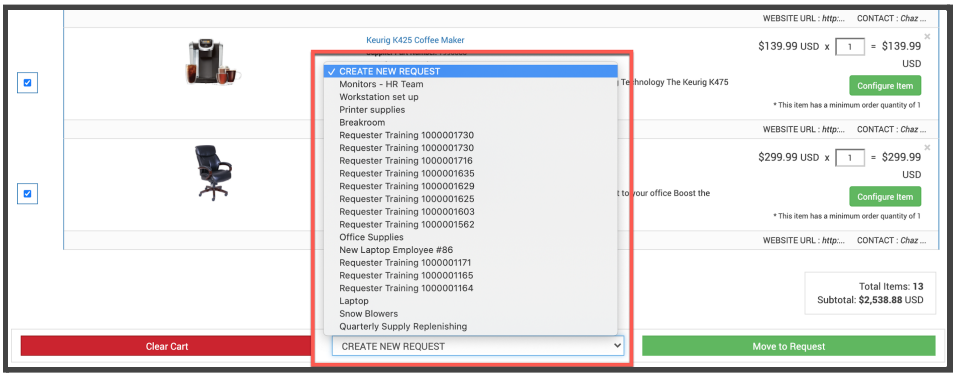


1. Identify the item that you would like to delete.
2. Click the trash can icon. The item will be removed from your *Request*.
3. A pop up will appear asking if you are sure you would like to delete the item. Click the 'Yes, Remove Line Item!' to accept. The item will be removed.

Add Shopping Cart Items to an Existing Draft

From your shopping cart you have the ability to add line items to the *Purchase Request* after other line items have already been selected. If you would like to start a new *Request* from the *Homepage*, refer to other *Create a Request* sections available.

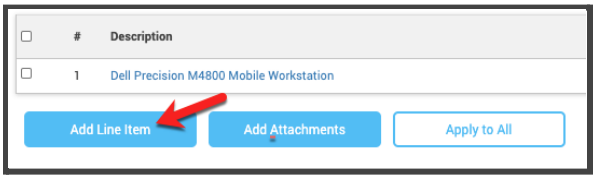
1. From the *Create Purchase Request* screen, enter your search term, and click the magnifying glass icon to execute the search.
2. Locate the item and amend the *Quantity* if needed.
3. Click 'Add to Cart'.
4. Continue searching for and adding items to the *Cart* until you have everything you need from the *Internal Catalogs*. (not pictured)
5. Click the *Cart* icon.
6. Review the contents of your *Cart*.
7. Use the drop-down menu to find the request you would like to add the items to.



8. Click 'Move to Request'. The line items will be added to your request.
9. Continue with the submission of your request (not pictured). For more detailed instructions of how to do this, refer to additional *Create a Request* sections.

Add a Free Text Line Item

While in the *Create Purchase Request* screen, you have the ability to add *Line Items* to an existing *Purchase Request*. If you would like to start a new *Free Text Request* from the *Homepage*, refer to the various *Create a Free Text Request* sections available.

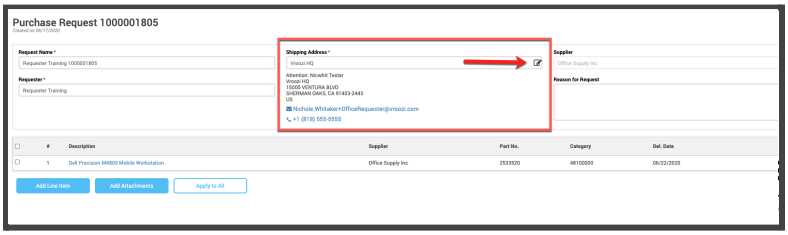


1. From the Purchase Requisition draft, select 'Add Line Item'. The Line Item Details screen will pop up to be completed. See the Free Text Requisition section for further details on completion of each field.
2. The 'Show Optional Fields' box can be left unchecked. You have the ability to check this box to reveal additional data such as the line item *Long Text* and *Product ID* fields depending on your organization's specific *Vroozi Purchase* configurations.

Edit Shipping Address

Global permission allowing Requesters to edit 'Shipping Address' is set by your Vroozi Administrator. The features defined in this section only apply to organizations with address editing enabled.

The Shipping Address for all Requests is defaulted based on your set Profile Information. However, this information can be updated on a request by request basis.

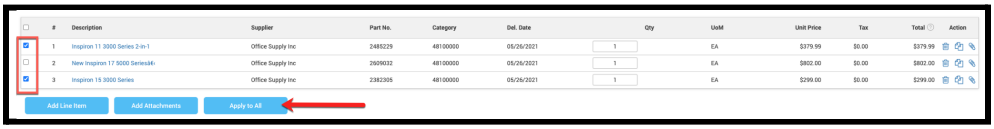


1. From the Create Purchase Request screen, click the ‘Pencil Edit’ icon next to the shipping address. The Edit Address window will pop up prompting you to fill out new address information.
2. Fill out all required fields.
3. Once the address has been updated, slide the Update Address function from “off” to “on”.
4. Click ‘Save Address’.
5. You will be returned to the *Create Purchase Request* screen with your new address information populated on the *Request*. (not pictured)

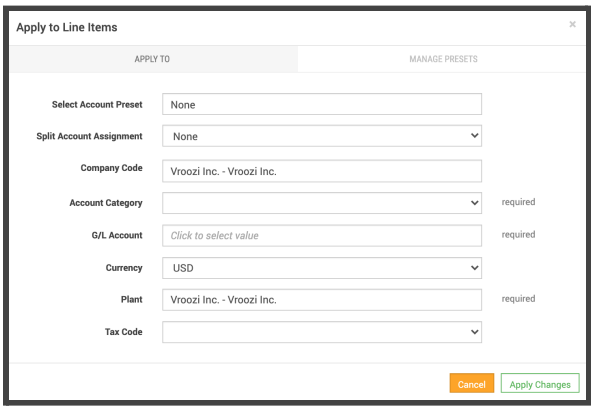
Apply To All Function

Edit accounting information for more than one line item at a time by following the steps outlined below.

1. Select the Line Items you would like to update with the same information by checking the boxes next to them.
2. Click the box in the line item description header or once one item is selected click 'Apply to All' to apply any changes to all items.



3. Fill out the appropriate information. Not all of the options need to be selected in order to proceed to the next step.



4. Click 'Apply Changes'. You will be returned to the Line Item Overview and your Line Items will be updated.

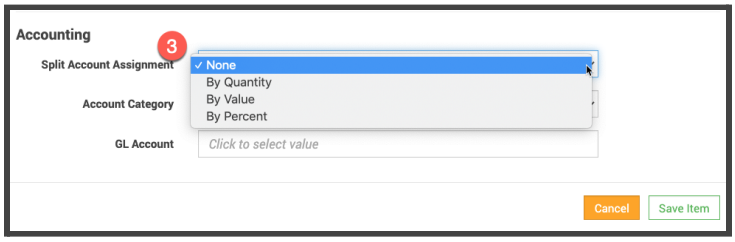
Note: Depending on the vendor and item, you may need to enter additional required information for each Line Item before you are able to submit your Request above and beyond what was selected while using Apply All. Vroozi

Purchase will provide a message if any minimum information requirements have not been met.

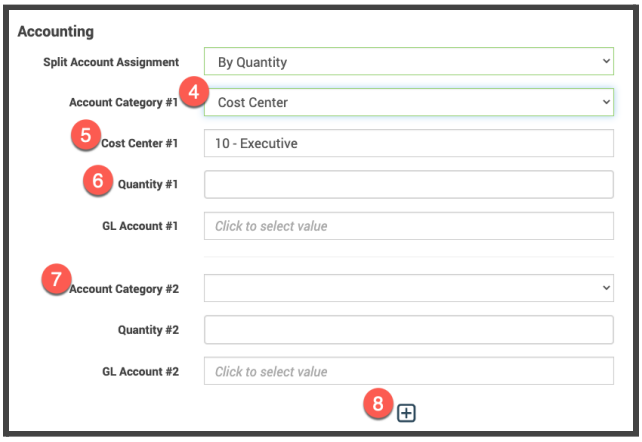
Split Account Assignment

Use split accounting to share the cost of an item among multiple accounting groups. For Requesters with the permission to edit line items (assigned by your administrator), the ability to split the accounting will be available.

1. From the *Purchase Request* draft, locate the item you would like to update 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. (Image below shows the Split Account assignment by Quantity.)
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.

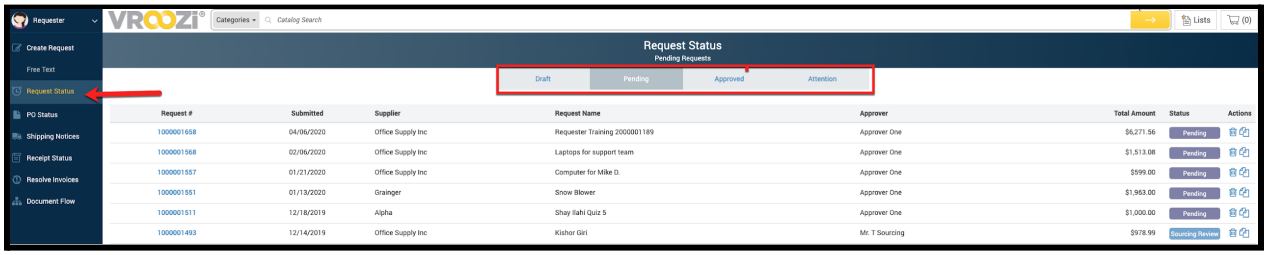


9. Scroll down and click the *Save* button to update the *Line Item*. (not pictured)

Purchase Requests

A *Requester* is able to view any *Request* they have created by navigating to the *Purchase Requests* category in the Navigation Panel. Here Requests are organized into 4 categories; Drafts, Pending, Approved and Attention (rejected) *Requests*.

Click on the desired status column to display a historical list of *Requisitions*. (The *Pending* tab has been selected in the image below.)



To view the details or initiate an action on a PO, click the linked 'Request Number'

Duplicate (Copy) a Request

Once a *Request* has been approved, you have the ability to duplicate, or "copy" this request and submit it as a new *Request* for approval. This function is time-saving for large recurring orders because you do not have to search for the line items again. Once copied, you are able to add or delete *Line Items* to tailor the request to your needs at that time.

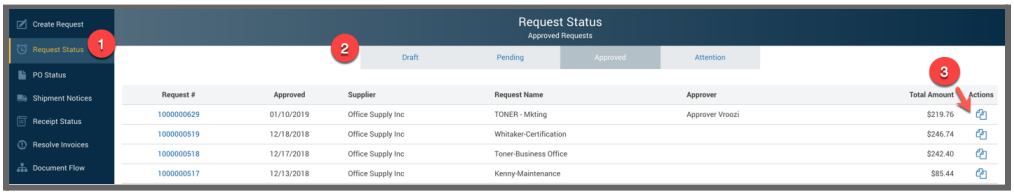
Pending and approved *Requests* with line items from internal catalogs may be copied, and the system will validate the pricing before submission. However, *Punchout* catalog line items cannot be copied because the price checking function is not available for external websites.

For more detailed information about how to complete purchase requests after the duplication process, see previous *Create'* sections.

1. First, you must locate the approved request to duplicate. From the *Homepage*, select 'Purchase Requests' from the navigation panel.

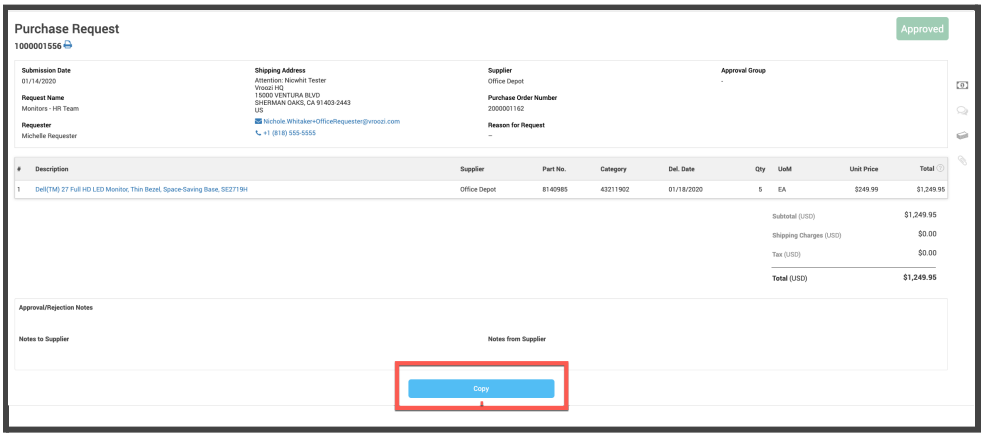
2. From this page, you are able to view your requests by status. Click on 'Approved' or 'Pending' requests.

3. Locate the request



you would like to copy and click the 'Duplicate Request' icon (stacked papers on the right side) to begin the process. You may preview this request beforehand by clicking into the linked 'Request Number'.

4. Alternatively you may copy a requisition from the requisition view by clicking Copy. (shown below)



5. A new requisition with a new unique document number will be created with the same items and Accounting and Tax information as defined in the original request. (not pictured)

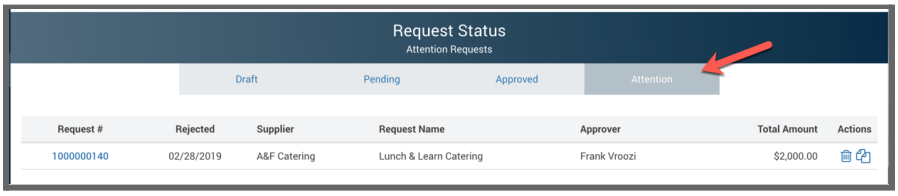
6. Verify the correctness of the new *Purchase Request* and update the information if needed.

7. You are able to customize your newly copied *Request* using the available functions within the request like adding or removing line items, updating quantities, adding attachments, and updating the accounting sections. See the *Create a Request* sections for more details.

8. Once the data and notes for the copied request are updated and verified, *save'* the request or 'Submit' for approval. (not pictured)

Resubmit a Rejected Request

At the administrative level, your organization may configure the Vroozi system to allow Requesters the ability to directly edit and resubmit a Requisition that has been rejected. If your organization does not allow for resubmittance of requisitions, see the *Copy (Duplicate) Request* section as an alternative method of



re-submitting a *Request* for approval.

When a *Request* is rejected, you will be notified via email. The *Request* will be in the *Attention* status tab for you to review and take action to edit and submit it again to your approver(s).

1. Click the *Attention* (rejected) *Requests*.
2. To drill down into *Request Details*, click the linked *Request Number*.
3. Review the *Notes from Approver* to see why the *Request* was rejected and if it needs to be amended and re-submitted for approval.

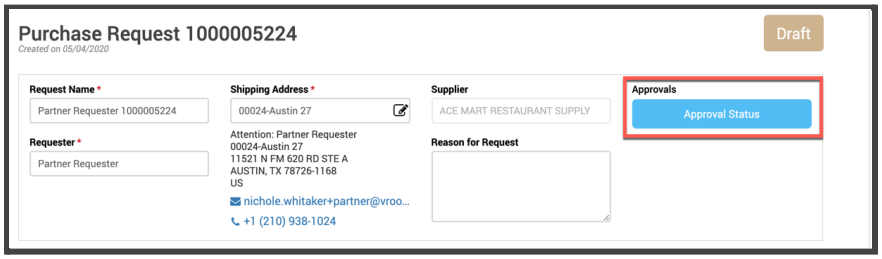
> **Note:** If there aren't any new notes or attachments from the approver, it is recommended that you email or call the approver who rejected your Request to find out the reason for rejection.

4. Make any necessary changes to the *Request*. This could be a *Quantity* change, adding or removing *Line Items*, or attaching relevant documents for example.
5. Add any *Notes for the Approver* if needed by clicking 'Add Note'. Enter any comments and click the green 'Save Note'. (not pictured)
6. Scroll down to the bottom and click 'Submit Request'. (not pictured) The *Request* will now be classified as *Pending* if it is above the auto-approval threshold. You will receive an email notification once it has been approved (or rejected again).

Approval Status

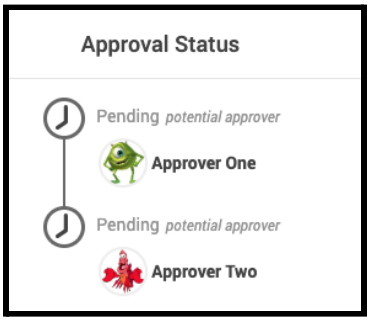
Based on configurations defined by your administrator. Based on each individual's spend threshold, requisitions after submission may go through a series of approvals.

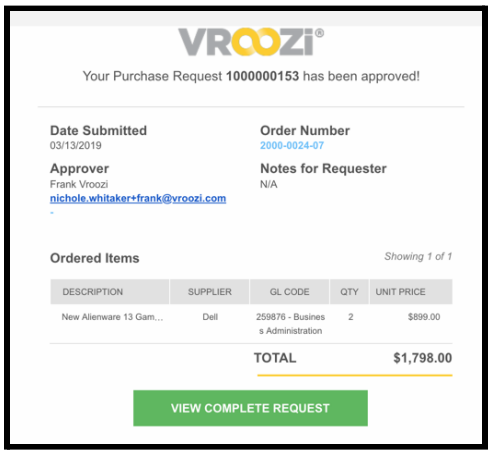
Before or after submitting a requisition you can view the approval workflow by clicking 'Approval Status'



(shown on right) on the Requisition.

Once clicked all approvers will be revealed. (shown below) If approval review has been completed by any listed approvers, the date and time of their response will be notated.
Once your Requisition has completed any applicable approval workflow, an email notification will confirm approval.





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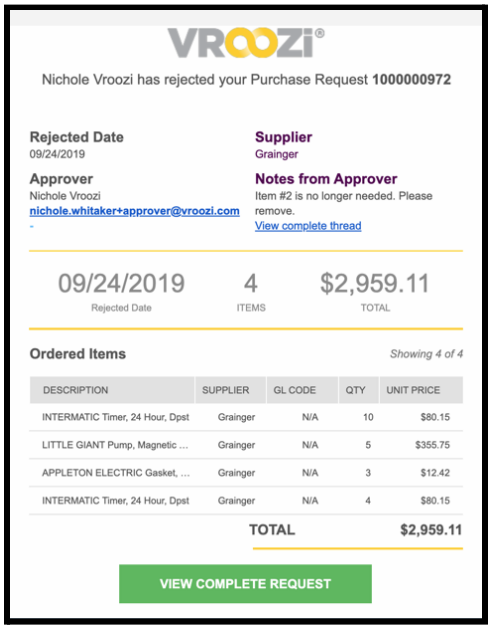
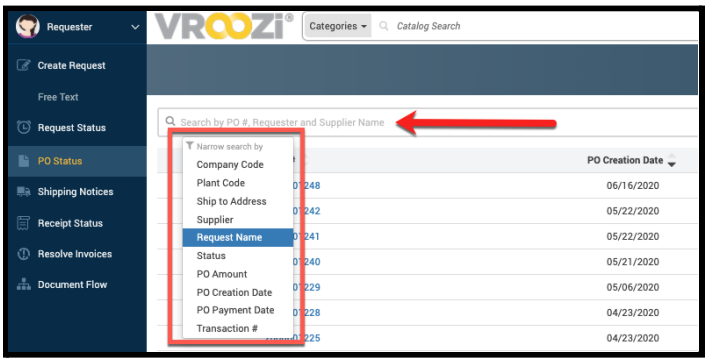
Similarly rejected Requisitions will trigger an email notification. The email notification will include who rejected the requisition and if available will include the rejection notes provided by the Approver.



Purchase Orders

A *Requester* is able to view all their *Purchase Order* by navigating to the Purchase Orders category. Here, POs are able to be searched, filtered and viewed.

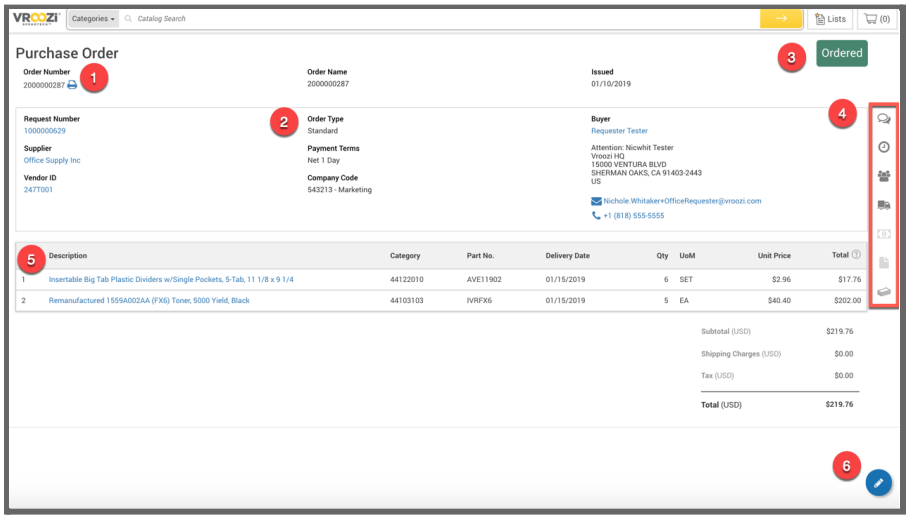
1. Select 'Purchase Orders' in the navigation panel.
2. From here you will be able to view the repository of all your *POs*. Use the Search bar to search by Accounting elements, Request Name, Status, Supplier, etc. (shown on right)



3. Click any of the arrows to organize by *PO Number*, *PO Creation Date*, *Supplier*, *Request Number* or '*Purchase Orders*' by ascending or descending order. POs are automatically organized from oldest to newest.
4. To drill down into PO Details, click the linked PO Number for more information.
5. The corresponding *Purchasing Parties*, *Supplier*, *Payment*, *Communications*, and *Related Document* data can be viewed by clicking the icons on the right side of the page.
6. There is also an option to *Print* or save it as a print-friendly document.
7. If the *PO* has been *Ordered*, a *Goods Receipt* can be created directly from this page by clicking on the circular blue icon docked on the bottom right of the page.

Purchase Order Navigation

1. Click the print icon to print the PO or save as a PDF
2. Basic Buyer and Supplier details shown.
3. Quick reference status icon.
4. Navigation icons to add comments, view PO history, supplier and payment details, record notes and view related documents. (more on comments in next section)

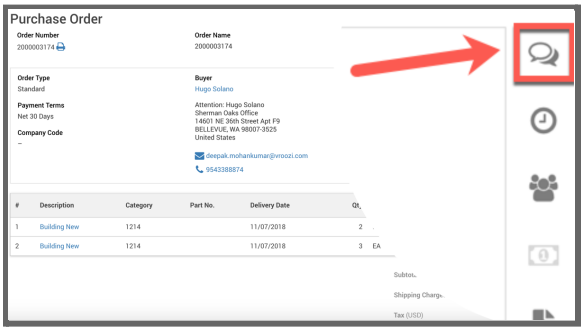


5. Line Items. Click the description to view specific details.
6. Create a PO Change Request (as defined by your administrator)

Document Navigation

The Document Navigation bar is available within any submitted Requisition through to Invoice.

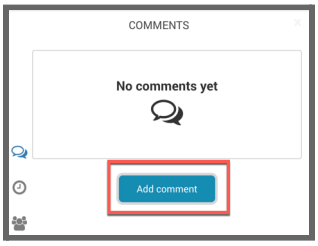
Here you can access the history of the document. Which includes various communication channels and history through different looks.



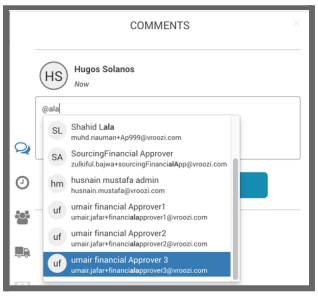
Add Comments to a PO

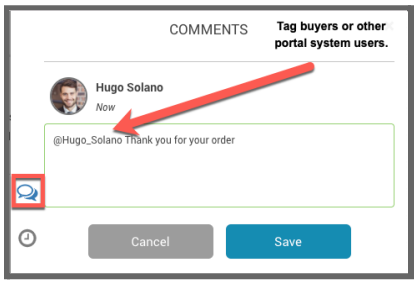
An optional 'Comment' icon can be accessed at the top of the navigation icons on the right side of a PO or Invoice, allowing any user with access to the document to communicate internally with other users in the application.

- Comments field expands to view or 'Add comments

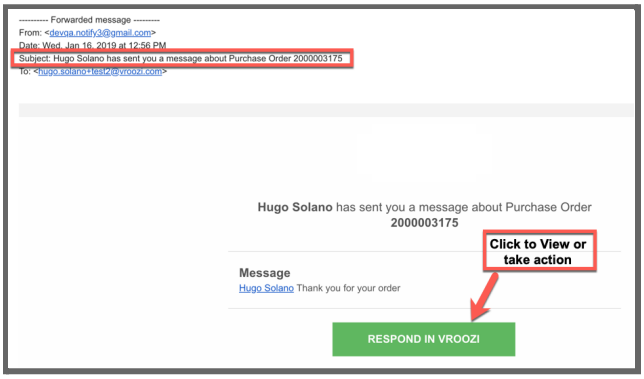


- Comments will be viewable by all users with access to the document. To specifically notify a user(s), type @ to retrieve a list of users to tag in the comment.





- Any user(s) tagged will receive an email notification of a 'Comment' (See below)



Purchase Order History

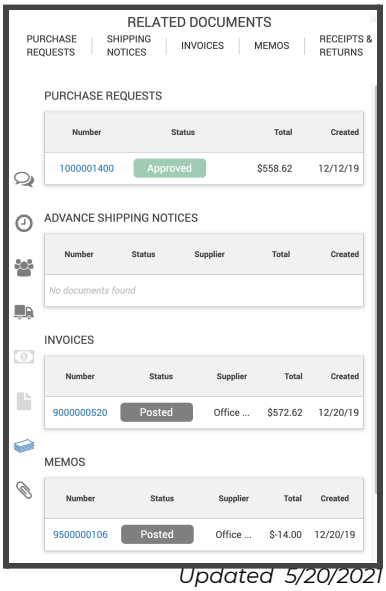
View the history of the document including user names, action taken with date & time stamps.

Purchasing Parties

View Requester, Buyer, Company Code and Supplier details.

Supplier

Access Supplier contact information



View Payment History

View invoice history (if it exists)

Notes

View history of Notes that have been added to each transactional document in the flow. This may include notes from requester, buyer, (approvers), AP team members & the supplier.

Related Documents

View Purchase Requests, Shipment notice, Invoices, Receipts & Returns. Click the hyperlinked document number to access the referenced document directly. (shown on right)

Note: Any fields without data can be selected but will appear in a light gray color. Example on previous page shows a PO that has not yet been paid therefore the Payment Icon appears in a lighter color. (shown below)

Responding to a Disputed or Confirmed Purchase Order

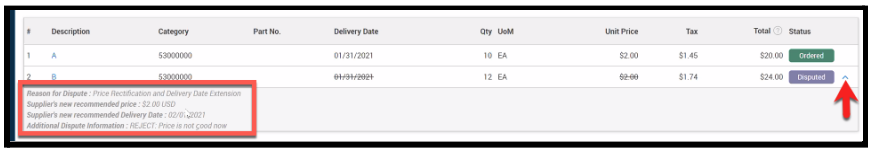
Based on the communication standards set by each supplier, you may receive PO status updates from a supplier that includes confirmation or dispute of each line item.

What if an item is confirmed?

This means that the supplier has accepted the quantity, price and delivery date of the item as listed in the PO.

What if an item is confirmed?

Based on the type of PO Change Request permissions available, you may choose to remove the Disputed PO item(s) and add a replacement item.



If the item has been disputed based on the delay in shipment, you may choose to leave the PO as is and wait to receive the items. If the item has been disputed based on a price change, you (if POCR is enabled) may change the price.

Changes made to the PO may send that document back through financial and/or sourcing approval reviews following your organizations workflow configuration. Once

approved, all of the PO changes will result in the transmission of an updated PO to the supplier, which will again be confirmed or disputed by the supplier.

Outside of POCR actions, Requesters could choose to create a new PO with alternative items or services.

Goods Receipt

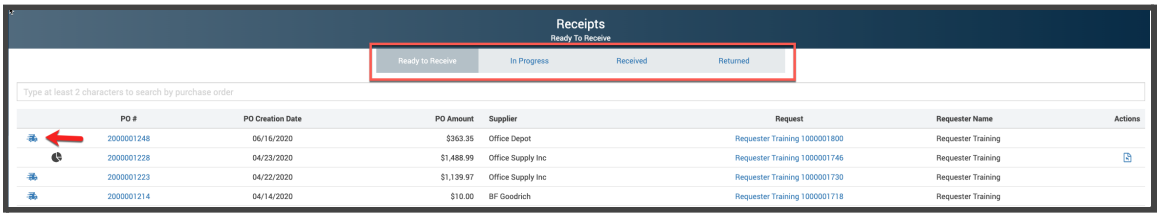
A *Goods Receipt* is a document that is issued to acknowledge the receipt of items received from external vendors.

Create a Goods Receipt

After catalog products or products & services are delivered to you, verify the completeness of your order and create a *Goods Receipt*. This section describes how to create a *Goods Receipt* when all products and mixed requests are delivered as expected, without issue.

From the *Homepage*, click 'Receipts' from your Requester panel. Your view will default to the 'Ready to Receive' tab listing all POs awaiting the completion of a goods receipt. Any POs that do require a goods receipt will not be listed in this tab. Please see your administrator for specific information of the Goods receipt requirements for your organization.

1. Locate the *PO Number* you would like to receive. Next to it, click the truck icon. Once selected, the *Create Goods Receipt* view will open.



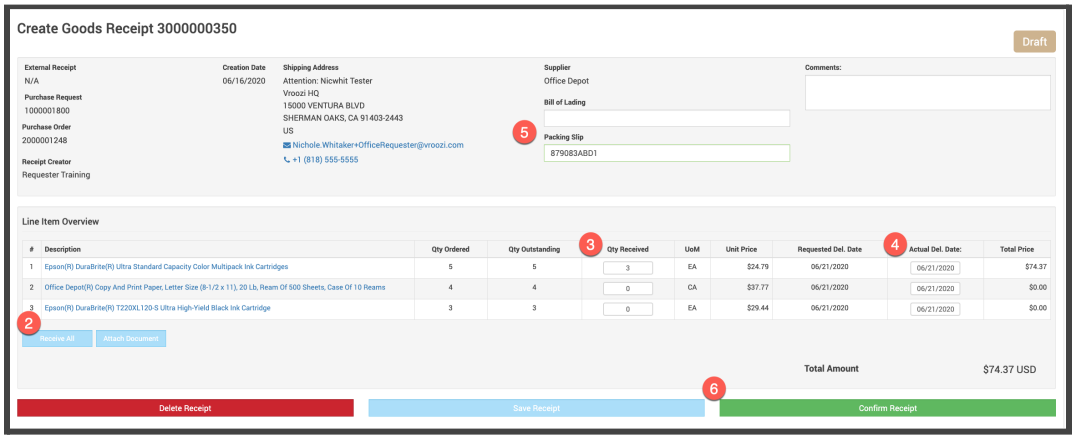
2. From the Goods Receipt draft, review the line item quantities and compare to what has been received. If all items have been received click 'Receive all'. (shown on next page)

3. If some items have been received, enter the specific number of received items in the Quantity Received field. Once submitted, this action will create a parietal goods receipt and the PO will remain in the 'Ready to Receive tab

until all items have been received. POs in this status will be indicated with a pie icon as shown in the next section.

4. If the item(s) were received prior to receipt creation click into the 'Actual Del. Date' of the line item to select the appropriate date in the delivery calendar. Unless updated the delivery date will default to the date the receipt draft was originally created.

5. Enter the *Bill of Lading* and/or *Packing Slip* information. If needed, add any *Comments* to the *Goods Receipt*. These fields are optional.



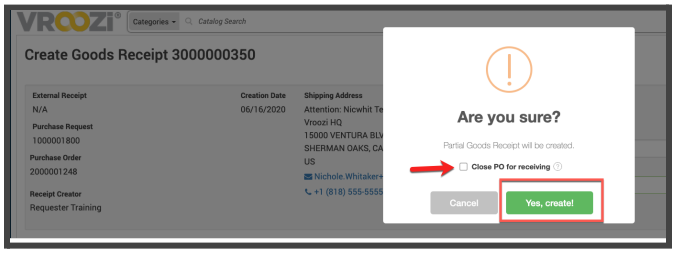
6. Click 'Confirm Receipt'. Once completed, the Goods Receipt will be relocated to the 'Ready to Receive' tab within 'Receipt Status.

Create a Goods Receipt for Partial Delivery (1/2)

As outlined in the previous section, a partial receipt of goods can be completed. For many organizations it is a best practice to receive items as they come in rather than waiting until all have arrived, making the partial receipt process a frequent occurrence.

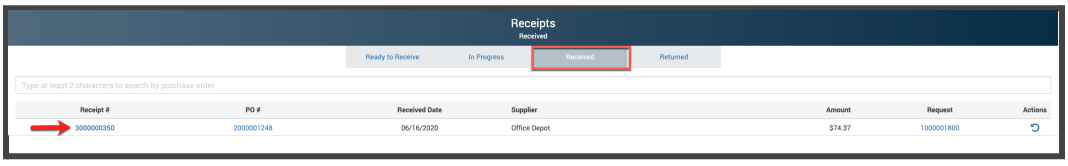
To get started follow steps 1 and 2 outlined in the previous section. At Step **3** enter the specific quantities received. Once you have completed any packing slip information, added comments or updated actual date of delivery, complete the partial receipt by selecting 'Confirm Receipt.'

A pop up window will prompt confirmation that you would in fact like to submit the partial *Goods Receipt*. Click 'Yes, Create!'.

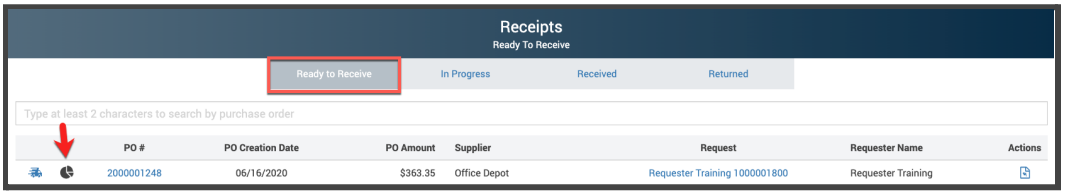


> ***Note:*** *If the non-received items will never be received due to discontinuation or reasons. Select 'Close PO for Receiving'.* This will remove any further receipt requirements for items related to the particular PO.

The *Goods Receipt* document will be recorded in the *Received* status tab historical data. The dollar amount for this Goods receipt will only display the value of the received items.



The PO will also remain in the 'Ready to Receive' tab with a *Pie* icon next to the delivery truck icon. (shown below) This indicates that some but not all items have been received.



Create a Subsequent Partial Goods Receipt (2/2)

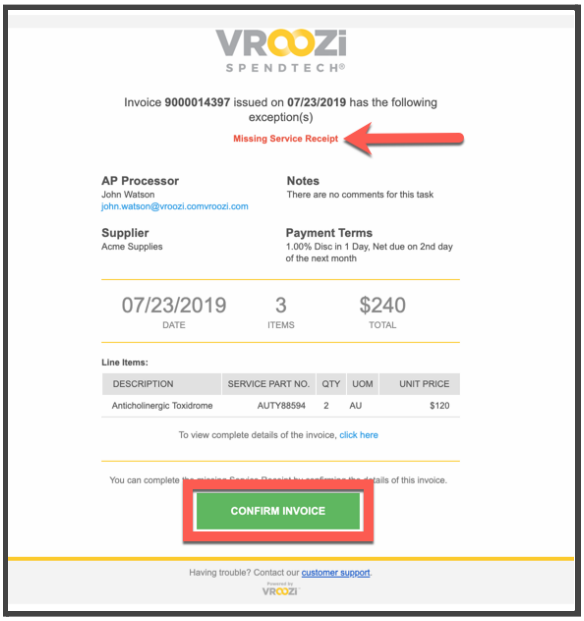
After a partial *Goods Receipt* is executed, the document remains in the *Ready to Receive* status. When the remaining products are delivered, a *Subsequent Partial Goods Receipt* will need to be entered in the system. This may need to happen more than once until fulfillment.

Repeat all steps as defined in Part 1. Once all items are fulfilled the PO will completely move to the 'Received tab.'

Service Receipts with 1-click Confirmation

If enabled by your administrator any recipients of a Missing *Service* Receipt email notification can generate a '**Service Receipt'** with **'1 click'** directly from that email.

- The Service Receipt specification will appear at the top of the email. To take action recipients can simply click 'Confirm Invoice'. *(image on next page)*



Goods Receipt created from an ASN

(Only applicable for buying organizations using the Supplier Portal.)

Advanced Shipment Notices can be submitted through the Supplier portal by the supplier user who creates it against a Purchase Order.

Upon Shipment Notice submission, the PO Requester receives email notification of

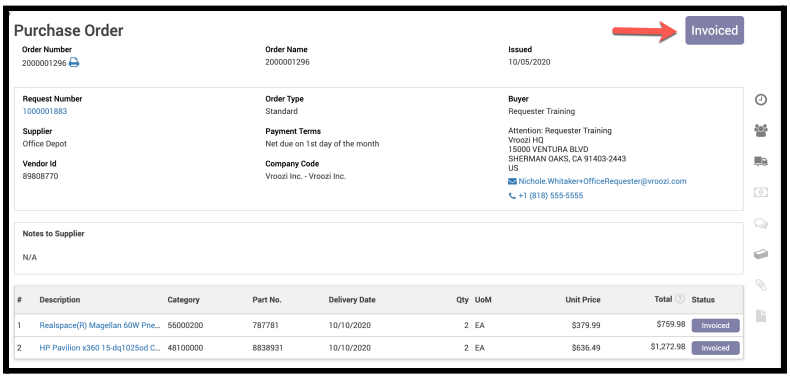
the ASN containing details of the Purchase Order shipment.

PO Requester can create a Goods Receipt directly from Shipment Notices

Create a Goods Return Against an 'Invoiced' PO

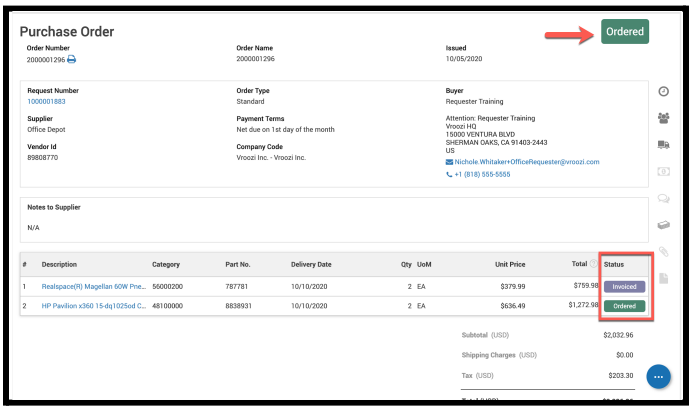
Vroozi supports the complexity of reinvoicing (rebilling) processes with your suppliers. If enabled at the administrative level, Requesters will have the ability to create a Goods Return for an item which has already been *'Invoiced'* in the system in order to initiate the re invoicing process. Previously the option to return items was removed from the Goods Receipt view once the associated PO was in 'Invoiced' status.

Workflow



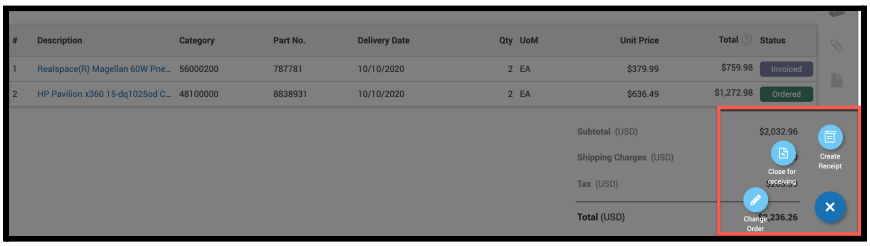
When a PO is allowed to be reopened post invoicing by Requesters/Buyers the Goods Receipt status will either be, '*Confirmed*', '*Shipped*' or '*Ordered*'. *The change of status from 'Invoiced' back to one of these statuses opens the PO for returns and then if necessary receiving.*When a Goods Return 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.



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.

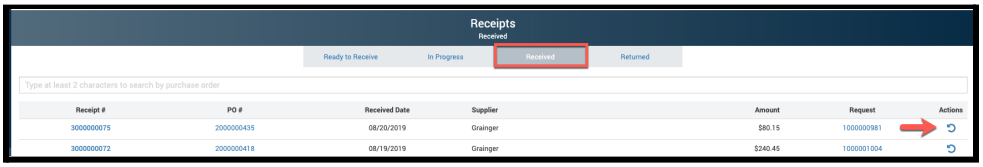
When or if the returned/replaced, PO items are again received, the Requester/Buyer has the ability to again confirm receipt of goods for the items in 'Ordered' status. As shown on the previous page, the PO view will again display the options to 'Create Receipt' or 'Close for Receiving'. Requesters should select 'Close for receiving' if the items returned post invoice will never be replaced by the supplier.



Goods Return

If you need to return a product that was delivered for any reason, you must first create a *Goods Receipt* for those items. Only after the products have been received, can a return be documented in *Vroozi Purchase*. Any return documentation recorded in Vroozi does not trigger communication to the supplier. With this in mind, you should reach out to the supplier directly following any supplier or organization specific processes for initiating the return.

The steps for documenting a Good Return are as follows:



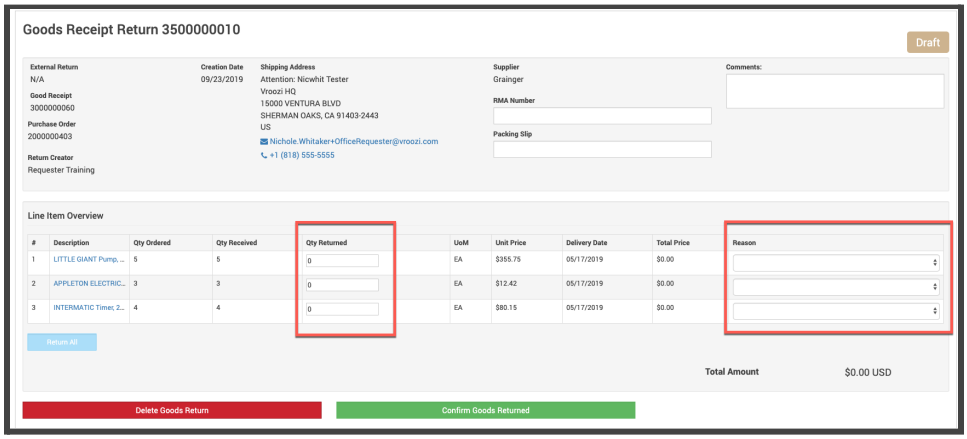
1. From the 'Receipts' category, select the 'Received' tab. This is the repository of all POs with completely or partially received items.

2. Access the completed goods receipt in the 'Received' tab.

3. Find the applicable Goods Receipt or PO number. In the right column click the action arrow. (shown below)

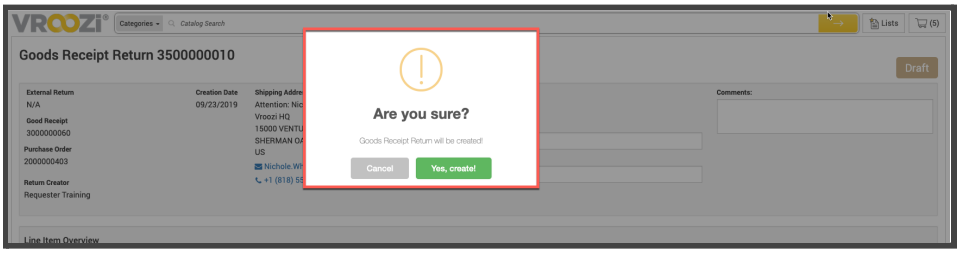
4. This will generate the Goods Receipt Return draft. There are 2 required fields on this draft.

    - ‘Quantity Returned’ and ‘Reason for Return’. (shown below)

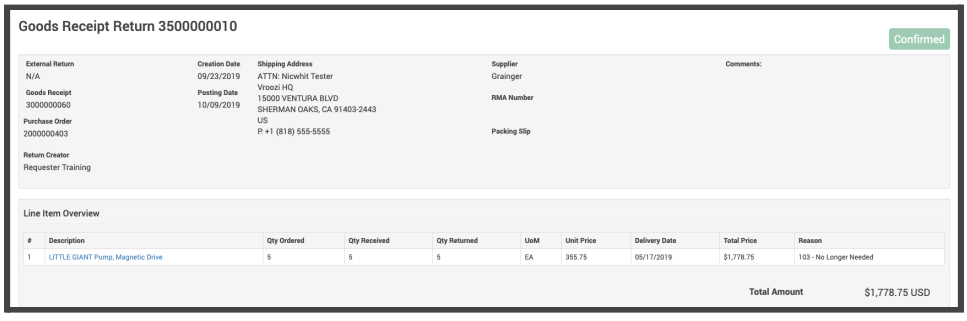


5. The RMA or Packing Slip information, and comments fields are optional.

6. Complete the Return form by selecting ‘Confirm Goods Returned’.
    - A pop up will ask you to reconfirm the return of goods. Select ‘Yes Create’. (shown below)



Success! You have completed the documentation of your goods return. The goods return document may be accessed under the ‘Returned’ tab with it’s own unique number. The new status of this document will be ‘Confirmed’.



A return can also be viewed in the Related Documents section of the navigation bar found in the related PO, Goods Receipt or Invoice.

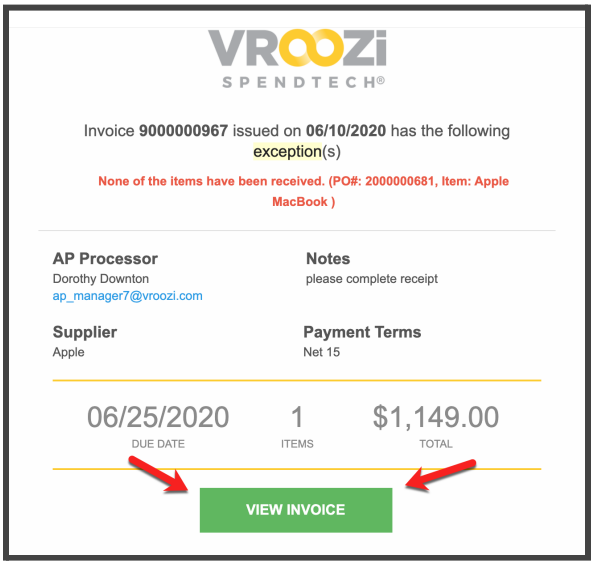
Purchase Order Change Request (POCR)

The POCR functionality allows a range of modifications to be made to a Purchase Order. Change order permissions are based on global settings designated by your organization's Administrators, identify which changes or combinations of changes can be made.

See POCR Guide in the Vroozi HelpDesk for specific details.

Invoices

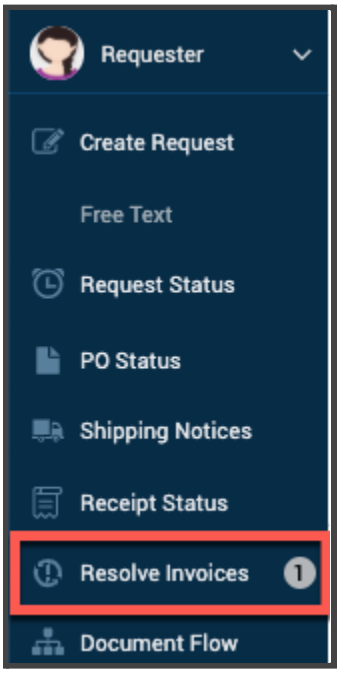
Based on the workflows defined by your organization's administrators you may be asked to resolve exceptions related to a PO created based on a Requisition you submitted. This will require immediate action by you.



Notification

When an exception occurs that requires your attention you will be notified **2** ways.

1. You will receive an email notification. Like other Vroozi emails, the notification will include the PO details and type of action required. Click 'View Invoice' to navigate directly to the invoice in *Vroozi Purchase*. (shown on previous page)
2. A badge indicating the number of invoices awaiting your response will appear next to the 'Resolve Invoices' category in your navigation panel.

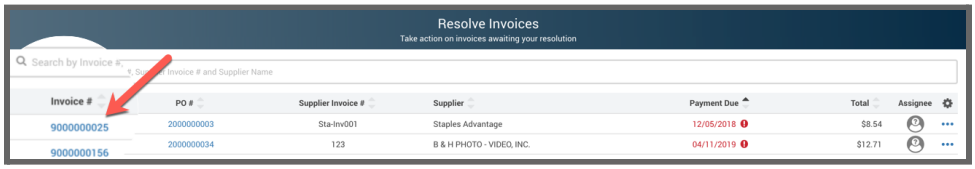


An exception indicates one or both of the following:

1. The PO is missing a Goods Receipt
2. There is a discrepancy between the PO submitted by your organization to the supplier and the Supplier Invoice.

Submit a Resolution

1. Open 'Invoices' and select the Invoice number to view the Exception message(s) and take action.



2. Click 'Assign to me'.

3. View Exception Handling Messages

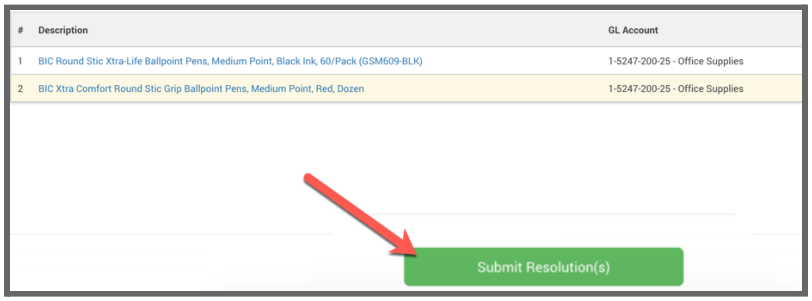
4. Select the Green Exception Actions

   In the example below, the first exception requires the Requester to Create a Goods Receipt. The process will be the same as for any other PO.

5. Resolve Exception will require you to select a resolution. Check the box for the desired action and include a message (optional)

6. Once you select an action the save button will become enabled.

7. 'Submit Resolution' to return back to the AP Processor



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.

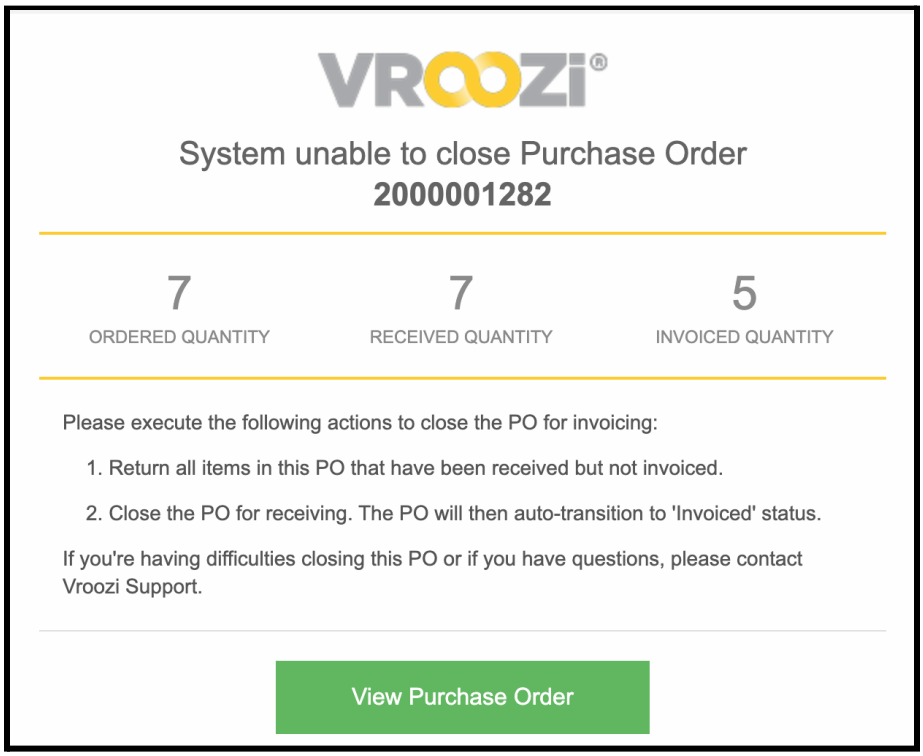
Based on the status of the Goods Receipt at the time this happens, you may be required to take action. In this event email communication will walk you through what to do.

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)



System unable to close Purchase Order
2000001282

7	7	5
ORDERED QUANTITY	RECEIVED QUANTITY	INVOICED QUANTITY

Please execute the following actions to close the PO for invoicing:

1. Return all items in this PO that have been received but not invoiced.
2. Close the PO for receiving. The PO will then auto-transition to 'Invoiced' status.

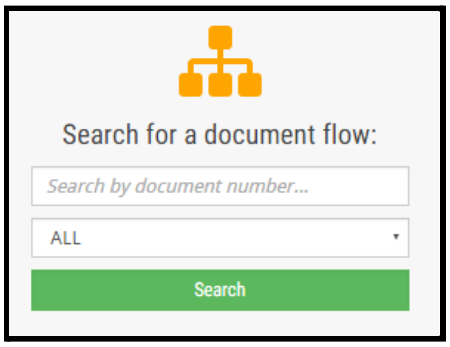
If you're having difficulties closing this PO or if you have questions, please contact Vroozi Support.

View Purchase Order

Document Flow

The *Document Flow* function allows requesters to view details of their transactions by document type. *Related Document* type. It also can display a diagram of where the *Request* is in the purchasing process lifecycle.

1. From the *Homepage*, click 'Document Flow' on the blue navigation bar. The *Document Type* drop down menu defaults to *All*. It is optional to update the type to further narrow the search results.

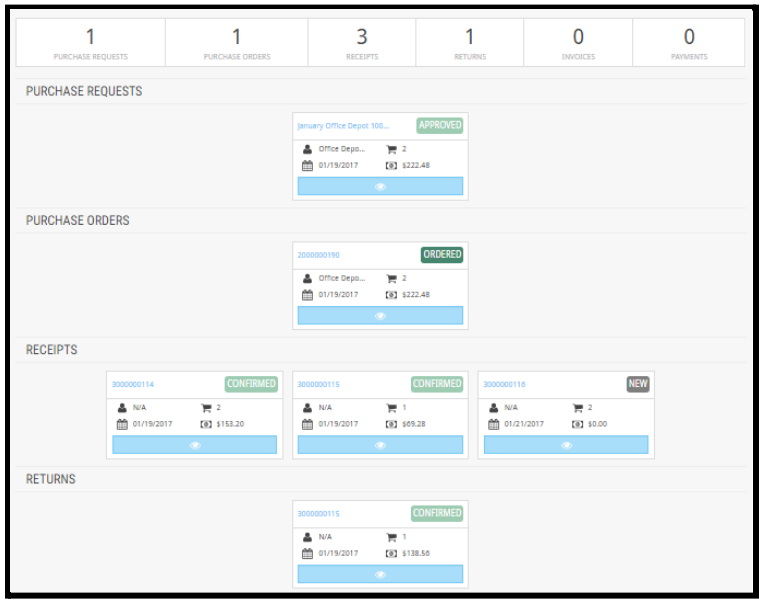


2. Select 'Search'.

3. The *Related Documents* will appear and display the current Status.

4. Click the *Eye* icon in order to view *Document Detail* information. (details not pictured)

5. Click 'Document Flow' to see every *Related Document* and how they are interconnected. See the example below.



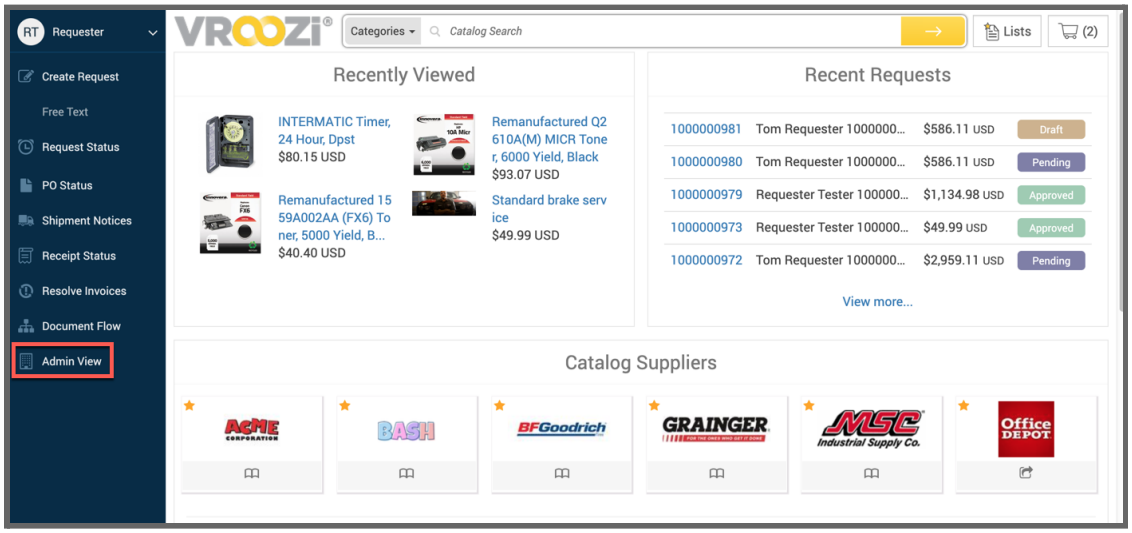
Central Receivers

Central Receivers can confirm receipt of goods or services, return Goods and resolve invoices for any Purchase Order on behalf of anyone in the organization.

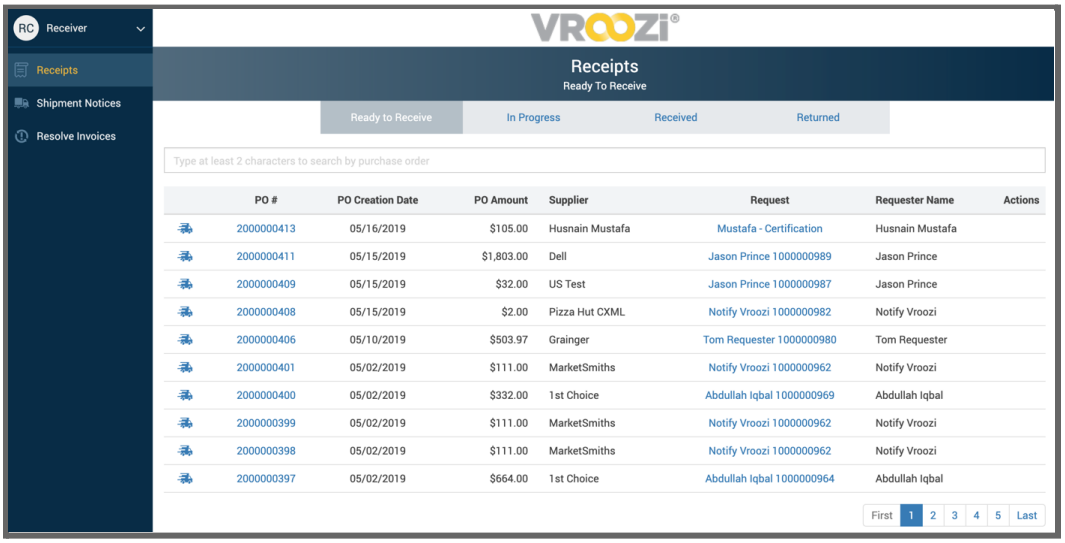
As a Requester with the Central Receiver role, Select Admin View in the navigation panel to open the Central Receiver functions. (see below)

Here you can search for the *PO Number* and create *Goods Receipts* or returns as described in the corresponding *Goods Receipt* and *Ordered Goods Return* sections. Depending on your organization, the *Central Receiver* role may or may not be available.

View of a Requester and Central Receiver dual role.



When logging in as a central receiver without any combined roles, you are immediately directed to the *Goods Receipts* page. Please see the *Goods Receipt* portion of this guide for further instruction.


RC
Receiver
Receipts
Shipment Notices
Resolve Invoices
VROOZI
Receipts
Ready To Receive
Ready to Receive
In Progress
Received
Returned
Type at least 2 characters to search by purchase order
PO # PO Creation Date PO Amount Supplier Request Requester Name Actions
2000000413 05/16/2019 $105.00 Husnain Mustafa Mustafa - Certification Husnain Mustafa
2000000411 05/15/2019 $1,803.00 Dell Jason Prince 1000000989 Jason Prince
2000000409 05/15/2019 $32.00 US Test Jason Prince 1000000987 Jason Prince
2000000408 05/15/2019 $2.00 Pizza Hut CXML Notify Vroozi 1000000982 Notify Vroozi
2000000406 05/10/2019 $503.97 Grainger Tom Requester 1000000980 Tom Requester
2000000401 05/02/2019 $111.00 MarketSmiths Notify Vroozi 1000000962 Notify Vroozi
2000000400 05/02/2019 $332.00 1st Choice Abdullah Iqbal 1000000969 Abdullah Iqbal
2000000399 05/02/2019 $111.00 MarketSmiths Notify Vroozi 1000000962 Notify Vroozi
2000000398 05/02/2019 $111.00 MarketSmiths Notify Vroozi 1000000962 Notify Vroozi
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