

Yooz Rising training – Business Edition

Module 4: Complementary settings

■ Objectives of the training

- Present to administrators the configuration of multichannel Capture, the possibilities of customization and additional Settings available in the application.
- Handle Settings for Users.

■ Prerequisite

- Having completed the module 1 « Organisational units and Masterdata » and module 2 « User management ».

■ Targeted audience

- This training is for administrators in charge of the Settings of the application.

■ Duration

- 40 minutes.

- Setting up the import of your documents
 - Pairing and configuration of your YoozBox
 - Configuration of Email capture
 - Configuration of Automated Invoice collector

- Creation and management of customized data in the invoice registration form
 - Creation and activation of customized data
 - Management of customized data

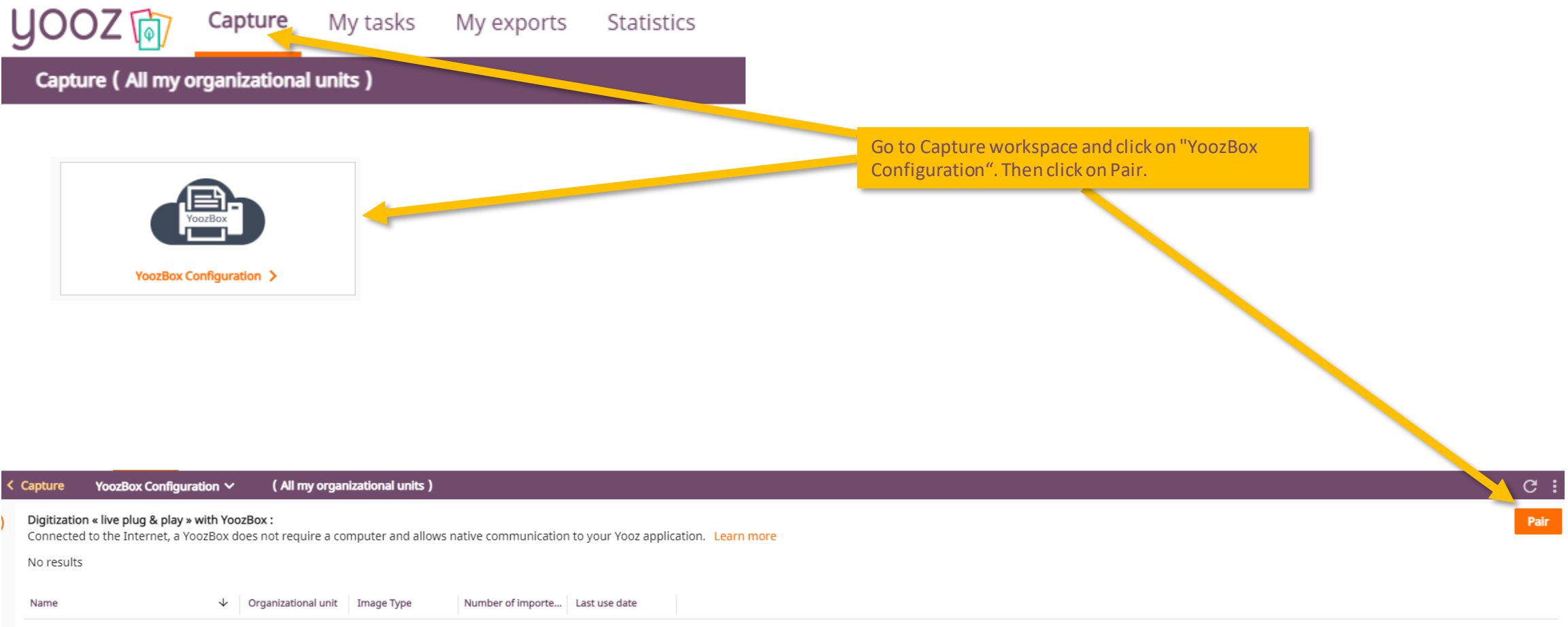
- Management of Notifications, Reminders, Duplicates and Disputes
 - Notifications management
 - Reminders management
 - Duplicate management
 - Dispute management

■ Other settings

- Recoverable VAT pro rata
- Accounting closing date

Setting up the import of your documents

- As Yooz Rising is a new application, you need to Pair your YoozBox (or repair if you have just migrated to Rising).



The screenshot shows the Yooz Capture workspace. The top navigation bar includes 'Capture', 'My tasks', 'My exports', and 'Statistics'. Below the navigation bar, the main heading is 'Capture (All my organizational units)'. In the center, there is a card with a YoozBox icon and the text 'YoozBox Configuration >'. A yellow callout box with an arrow points to this card, containing the text: 'Go to Capture workspace and click on "YoozBox Configuration". Then click on Pair.' At the bottom of the workspace, there is a section titled 'Digitization « live plug & play » with YoozBox :'. Below this section, there is a table with columns: Name, Organizational unit, Image Type, Number of importe..., and Last use date. The table currently shows 'No results'. In the bottom right corner of the workspace, there is a 'Pair' button.

Go to Capture workspace and click on "YoozBox Configuration". Then click on Pair.

< Capture YoozBox Configuration (All my organizational units)

Digitization « live plug & play » with YoozBox :
Connected to the Internet, a YoozBox does not require a computer and allows native communication to your Yooz application. [Learn more](#)

No results

Name	Organizational unit	Image Type	Number of importe...	Last use date
No results				

Pair

Briefly click on the flashing button on the right of the YoozBox



A numeric code appears on the YoozBox screen.

Within one minute:



Go back on Yooz and select in Properties screen:

- The Organisational units receiving the documents that will be scanned via this YoozBox
- The image type
- The PIN code displayed on the YoozBox screen
- The User linked to this YoozBox (automatic).

Properties *

YoozBox Configuration

Name *

BarackObama#222

Organizational units

Image type *

Color

PIN Code *

User *

Julie Breton

Cancel

Pair

To finalize the pairing, click on Pair:



■ Once the pairing is complete, the YoozBox appears in the configured YoozBoxes:

< Capture

YoozBox Configuration ▾

(All my organizational units)

Digitization « live plug & play » with YoozBox :

Connected to the Internet, a YoozBox does not require a computer and allows native communication to your Yooz application. [Learn more](#)

No results

Name	↓	Organizational unit	Image Type	Number of importe...	Last use date
------	---	---------------------	------------	----------------------	---------------

You can then configure the YoozBox services if necessary, by clicking on the table row:

YoozBox Configuration

Name *

YoozBox Test

Organizational units

My Company ✕ ▾

Image type *

Color ▾

Virtual box id

9dfa0b3b-286c-4f02-b8f2-73b91a70f23c_457262

User *

Administrator ▾

Services ▾

Name *	Document type *	Split options *	Page count	Validate the split before creating the documents	Confidentiality level *
+ ▾ Fact ACH Auto	Payable invoice - no PO	<input checked="" type="radio"/> Automatic <input type="radio"/> Every <input type="radio"/> None		×	0 - Unclassified
+ ▾ Fact ACH / 1p	Payable invoice - no PO	<input type="radio"/> Automatic <input checked="" type="radio"/> Every <input type="radio"/> None	2	×	0 - Unclassified
+ ▾ Fact ACH / 2p	Payable invoice - no PO	<input type="radio"/> Automatic <input checked="" type="radio"/> Every <input type="radio"/> None	4	×	0 - Unclassified
+ ▾ Avoir ACH auto	Payable credit note - no PO	<input checked="" type="radio"/> Automatic <input type="radio"/> Every <input type="radio"/> None		×	0 - Unclassified
+ ▾ Fact VTE auto	Sales invoice - no SO	<input checked="" type="radio"/> Automatic <input type="radio"/> Every <input type="radio"/> None		×	0 - Unclassified
+ ▾ Fact VTE / 1p	Sales invoice - no SO	<input type="radio"/> Automatic <input checked="" type="radio"/> Every <input type="radio"/> None	1	×	0 - Unclassified
+ ▾ Fact VTE / 2p	Sales invoice - no SO	<input type="radio"/> Automatic <input checked="" type="radio"/> Every <input type="radio"/> None	2	×	0 - Unclassified
+ ▾ Avoir VTE auto	Sales credit note - no SO	<input checked="" type="radio"/> Automatic <input type="radio"/> Every <input type="radio"/> None		×	0 - Unclassified
+ ▾ Commande auto	(?)	<input checked="" type="radio"/> Automatic <input type="radio"/> Every <input type="radio"/> None		×	0 - Unclassified
+ ▾ BI auto	Delivery slip	<input checked="" type="radio"/> Automatic <input type="radio"/> Every <input type="radio"/> None		×	0 - Unclassified

Remember to Save and then restart your YoozBox

Save

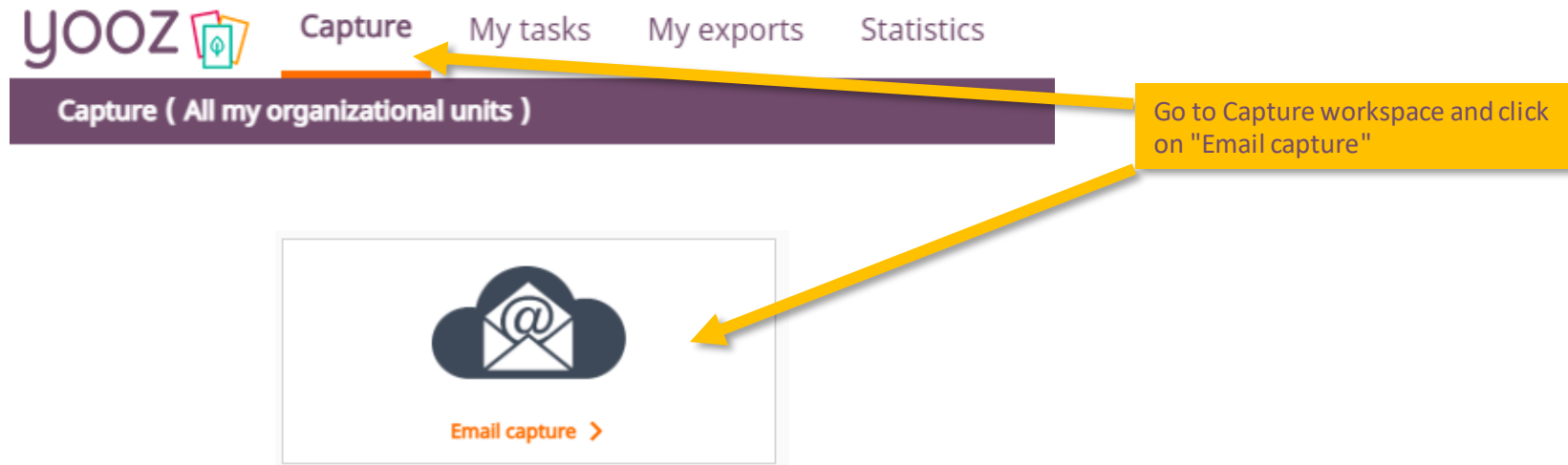
i

Yoozbox reboot required

✕

More

- Email capture consists of automatically collecting (without any manipulation) your documents by e-mail and integrating them directly (over time) into your Yooz application.



■ Organizational units

[< Close](#) Email Capture setup

Organizational units * Document type * Capture modes Additional data [Close](#) [Save](#)

Rules from your organizational units

One email address contains Organizational unit

Information pulled out from Settings > Organizational units > Identification data.

Advanced rules

One email address contains Email subject contains Organizational unit

+ ▼

Manage Advanced rules for your Organizational unit based on the email address configured and on the email subject.

By default

Organizational unit *

(?) ▼

Mention the Organizational unit assigned by default if it is not recognized automatically.

■ Document type screen

< Close Email Capture setup

Organizational units * Document type * Capture modes Additional data

Advanced rules

	One email address contains	Email subject contains	Document type
+ ▼		sales invoice	Sales invoice - no SO
+ ▼		factura de venta	Sales invoice - no SO
+ ▼		boleta de venta	Sales invoice - no SO
+ ▼		autres documents	(?)
+ ▼		autre documents	(?)
+ ▼		autres document	(?)
+ ▼		other document	(?)
+ ▼		other documents	(?)
+ ▼		avoirs de vente	Sales credit note - no SO
+ ▼			

By default


Document type *





Payable invoice - no PO ▼

Assign the Document type according to the elements found in the e-mail address or the subject of the e-mail.

Select the Document type to assign by default if it is not recognized automatically.

■ Capture modes screen

yooz  Capture My tasks More ▾

Search     Domitille Van Dijk ▾

< Close Email Capture setup

Organizational units * Document type * **Capture modes** Additional data Close Save

Advanced rules ▾

One email address contains Email subject contains Split options Page count Validate the split before creating ...

+ ▾ ☒ Automatic ☐ Every ☐ None x


By default ▾





Split options ☒ Automatic ☐ Every ☐ None Page count ☐ Validate the split before creating the documents

Configure the Split options Yooz should apply to documents captured by email.

Configure the Split option to apply by default.

■ Additional data screen

yooz  Capture My tasks My exports Statistics

Search     Domitille Van Dijk ▼

< Close Email Capture setup

Organizational units * Document type * Capture modes **Additional data** Close Save

Advanced rules

	One email address contains	Email subject contains	Additional data	Value
+ ▼		confidentiel	Confidentiality level	2 - Confidential
+ ▼		confidential	Confidentiality level	2 - Confidential

By default

	Additional data	Value
+ ▼	<div><div>Name</div><div>Document number</div><div>Currency</div><div>Description</div><div>Archive number</div></div>	

Configure the Additional data to add, depending on the subject of the email or the elements found in the email address.

Configure the Additional data to be added by default to the data recognized by Yooz.

Configuration of Automated Invoice collector

- In order to guarantee an automatic collection for 100% of suppliers, Yooz Rising combines 2 approaches:
 - An automatic collection of invoices received by your customer account on your vendors' web sites,
 - An automatic collection of invoices on your customer account e-mail address referenced on the vendors' web sites.

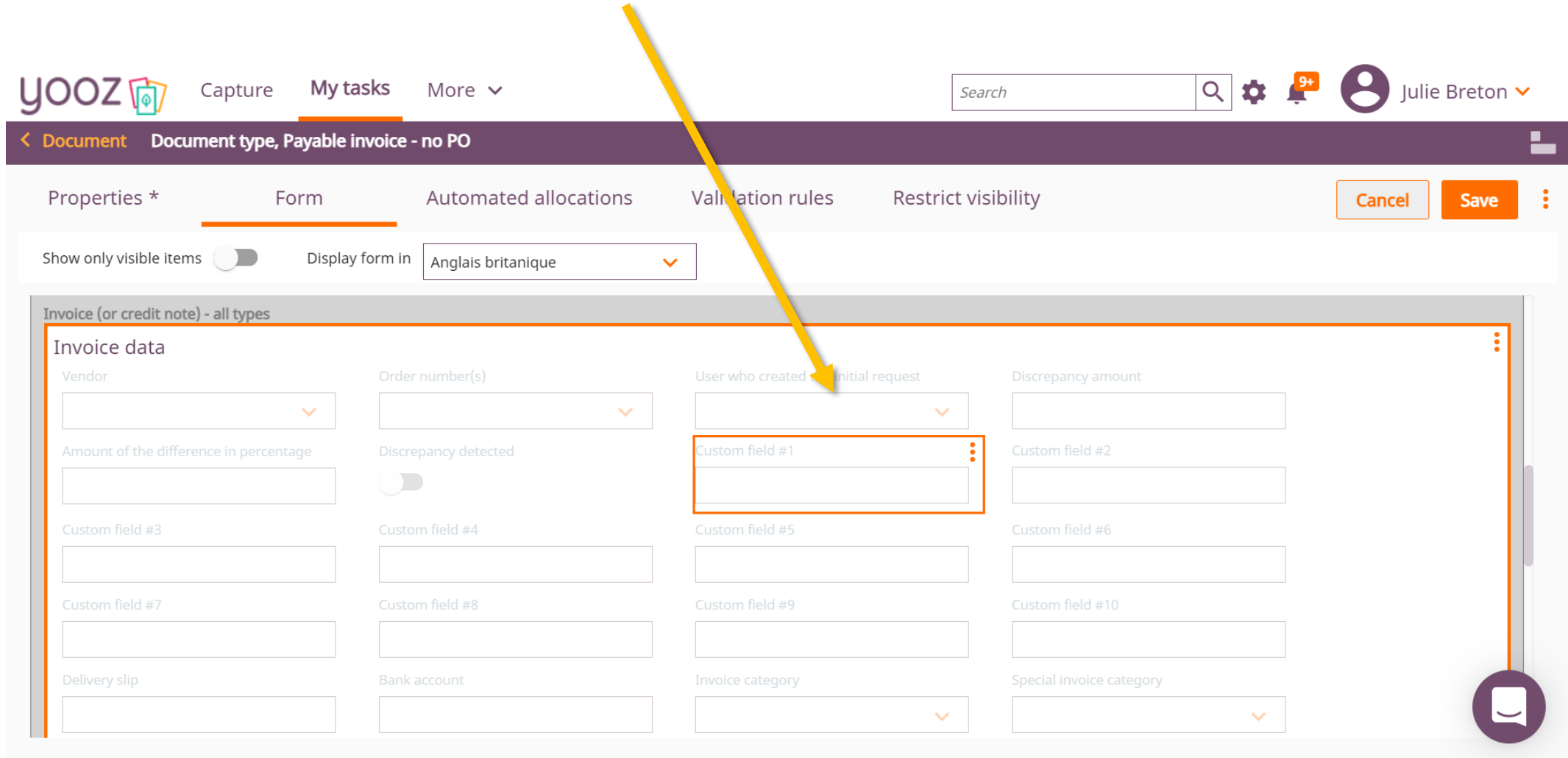
To implement this service, connect on your application and let our Help center articles guide you:

<https://help.getyooz.com/en/articles/3863403-automatic-invoice-collection-how-does-it-work>

Creation and management of customized data in the invoice registration form

-
- The screenshot displays the Yooz application interface for reviewing a payable invoice. The top navigation bar includes 'Capture', 'My tasks' (highlighted with a red box and a '1' badge), 'My exports', and 'Statistics'. A search bar and user profile 'Julie Breton' are on the right. The main header shows 'Review, Payables Invoice/Credit review' with a '1' badge. Below this, there are buttons for 'Close', 'Submit', and 'Forward...', along with a three-dot menu (highlighted with a red box and a '2' badge). The left sidebar has a 'Properties' section (highlighted with a red box and a '3' badge) containing various fields like 'Name', 'Organizational unit', 'Vendors', 'Payment method', 'Document number', 'Net amount', 'Total amount', 'Exchange rate', 'Converted tax amount', 'Document type', 'AP / AR account', 'Standard Supplier', 'Document date', 'Reception date', 'Tax amount', 'Currency', 'Converted net amount', and 'Converted total amount'. The main content area shows a 'Consolidated Invoice' from HGV Direct Ltd. A context menu is open over the invoice, showing options like 'Next', 'Previous', 'Block', 'Link with other documents...', 'Add comment', 'Export...', 'Customize form...' (highlighted with a red box and a '3' badge), 'Modify', 'Show', and 'Delete...'. The invoice details include 'Invoice To: CROSSROADS TRUCK AND BUS LTD', 'Delivered To: CROSSROADS TRUCK AND BUS LTD', 'Document No: INV129191', 'Order No: 775273', 'Sales Person: LJ19:01', and 'A/C Ref: 8184'. The bottom section shows 'Invoice lines' with a table containing one line item: 'ACCRUED TERMINATION ALL...' with a net amount of 37.79 and a total amount of 45.35.

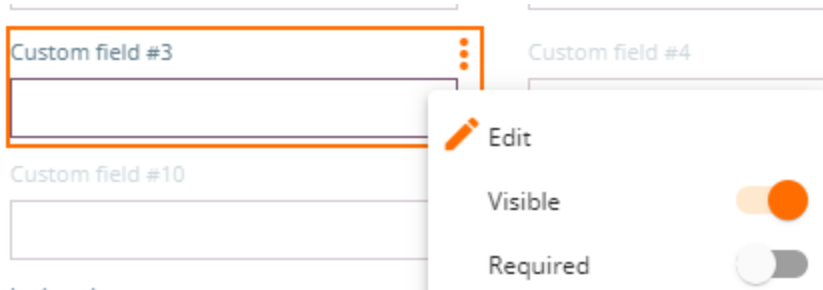
- Select the data (ex: Custom field #1) and click on  to access the customization screen.



The screenshot shows the yooz interface with the following elements:

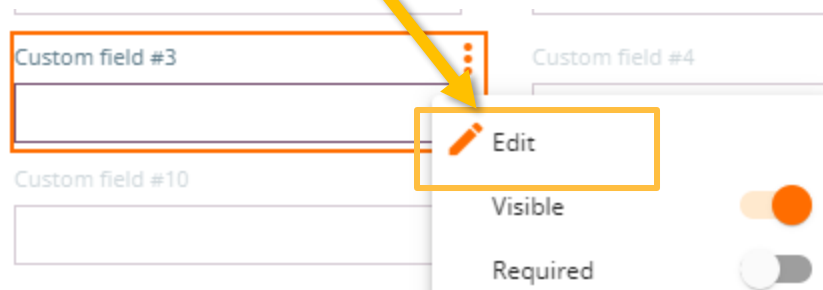
- Header:** yooz logo, navigation tabs (Capture, My tasks, More), search bar, settings gear, notifications (9+), and user profile (Julie Breton).
- Breadcrumb:** < Document Document type, Payable invoice - no PO
- Tabs:** Properties *, Form (selected), Automated allocations, Validation rules, Restrict visibility. Buttons: Cancel, Save, and a three-dot menu.
- Form Settings:** Show only visible items (toggle), Display form in (Anglais britannique dropdown).
- Form Content:** Invoice (or credit note) - all types. Invoice data section with fields:
 - Vendor (dropdown)
 - Order number(s) (dropdown)
 - User who created initial request (dropdown)
 - Discrepancy amount (text input)
 - Amount of the difference in percentage (text input)
 - Discrepancy detected (toggle)
 - Custom field #1 (text input, highlighted with an orange box and a three-dot menu icon)
 - Custom field #2 (text input)
 - Custom field #3 (text input)
 - Custom field #4 (text input)
 - Custom field #5 (text input)
 - Custom field #6 (text input)
 - Custom field #7 (text input)
 - Custom field #8 (text input)
 - Custom field #9 (text input)
 - Custom field #10 (text input)
 - Delivery slip (text input)
 - Bank account (text input)
 - Invoice category (dropdown)
 - Special invoice category (dropdown)

- Click on  of your custom field to customize

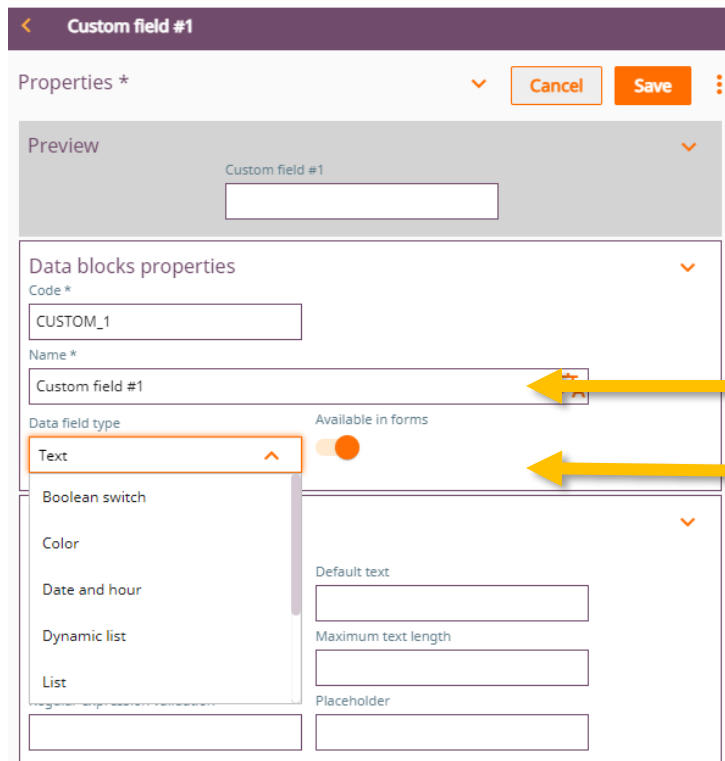


Click on Visible to activate the data.
To make the data mandatory, click on
Required.

- Click on « Edit » to access customizable data properties



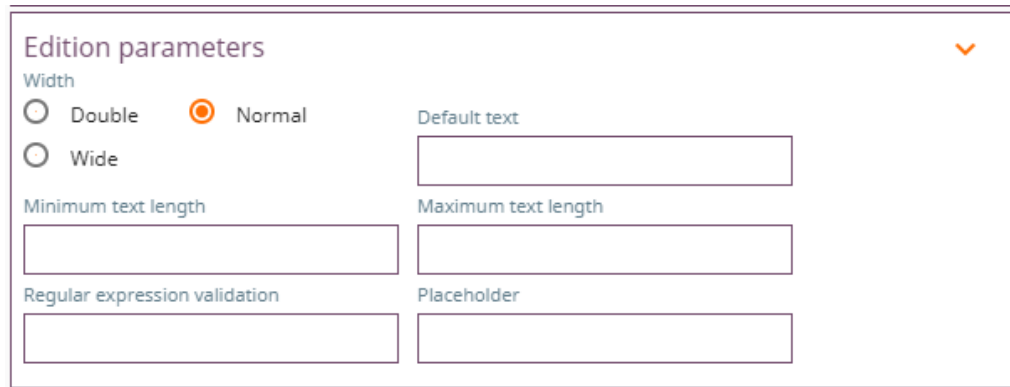
- Click on the tab « Properties » of the coding mask



The screenshot shows the 'Custom field #1' configuration window. At the top, there's a 'Properties *' section with 'Cancel' and 'Save' buttons. Below is a 'Preview' section showing a text input field labeled 'Custom field #1'. The main section is 'Data blocks properties', which includes a 'Code *' field (containing 'CUSTOM_1'), a 'Name *' field (containing 'Custom field #1'), and a 'Data field type' dropdown menu (currently set to 'Text'). To the right of the dropdown is an 'Available in forms' toggle switch. Below these are fields for 'Default text', 'Maximum text length', and 'Placeholder'.

Rename the data in the Name field.

Select the data format.



The screenshot shows the 'Edition parameters' configuration window. It includes a 'Width' section with radio buttons for 'Double' and 'Normal' (selected), and a 'Wide' option. There are input fields for 'Default text', 'Minimum text length', 'Maximum text length', 'Regular expression validation', and 'Placeholder'.

Configure the display of the data, its default value, the text length, etc...


■ Click on the tab « Restrict visibility »

< Document Document type, Payable invoice - no PO

Properties * Form Automated allocations Validation rules **Restrict visibility**

Restrict visibility
Restrict visibility to some organizational units?


If empty, applies to all ^

Restrict visibility to some or all  +

- ☐ (?)
- ☐ London Office
- ☐ Manchester Office
- ☐ Woking Office

Select the Organizational units for which the data must be visible.

■ Click on « Active date range »





yooz  Capture My tasks My exports Statistics

< Data fields Custom field #2






Properties * Restrict visibility **Active date range**


Active date range

Activation date Inactivation date

09/01/2020  06:01  MM/DD/YYYY  hh:mm 

Define the activation period for this data.

Search     Mario Monti 

Cancel Save 

Do not forget to save.

Management of Notifications, Reminders, Duplicates and disputes

Statistics

Search

1

In one click, access to the most frequent functions

Import a list...
(Organizational units, users, masterdata, ...)

Add organizational unit...

Access all the settings of your application

Organizational Units
Configure addresses, contacts and all properties of organizational units

Who?

Roles
Configure roles and their associated permissions

User groups

Users

Masterdata
Access and configure all masterdata loaded in your application

Dimensions

Integrations
Data imports, exports, external software connections, API documentation...

Processes & Workflows

2

Parameters & Preferences

■ Go on Notifications

1 Parameters & Preferences

- Application
- Display
- Documents processing preferences
- Notifications**
Configure notification methods, frequencies, do not disturb hours, etc. Notification levels are defined for each notification in the masterdata.

2 < Parameters & Preferences

Notifications

Configure notification methods, frequencies, do not disturb hours, etc. Notification levels are defined for each notification in the masterdata.

Notifications by level

- Platform messages**
General information messages, Yooz updates ...
- Informations**
Information notification level (ex: successful masterdata import...)
- Messages**
Message notification level typically for discussion thread (ex: comments in document)
- Warning messages**
Warning notification level typically for important information or minor errors
- Error messages**
Error notification level typically for major errors
- Critical messages**
Critical notification level typically for critical issue
- "Do not disturb" hours**
Do not receive notifications outside of the application (ex: via email, ...)

Customize how you want to notify the User by Notification type.

Activate "Do not disturb" hours.


3 < Parameters & Preferences < Notifications





Informations

Information notification level (ex: successful masterdata import...)

- Receive in the notification center
- Receive by email Deactivated >

Select the reception mode: email Notification or Notification center.

yooz  Capture My tasks My exports Statistics

Search     Julie Breton ▾










Settings


In one click, access to the most frequent functions


Import a list...
(Organizational units, users, masterdata, ...)

Add organizational unit...

Access all the settings of your application

-  **Organizational Units**
Configure addresses, contacts and all properties of organizational units >
- Who?**
 -  **Roles**
Configure roles and their associated permissions >
 -  **User groups** >
 -  **Users** >
-  **Masterdata**
Access and configure all masterdata loaded in your application >
-  **Dimensions** >
-  **Integrations**
Data imports, exports, external software connections, API documentation... >
-  **Processes & Workflows** >
-  **Parameters & Preferences** >

1  **Go on Settings.**

2  **Go on Processes & Workflows**

■ For these settings, go to « Payables invoice/credit process », then « Settings »

Process

Other document process

Payables invoice/credit process

Modification in progress by Florian Noiret, started on Thursday, 21 January 2021 08:40

Payables Process

< Back

Process settings

Notify the recipients of the task

Mark tasks as "Late" after a certain time

Configure main actors

Define the stakeholders (users you can transfer a task to) and the business administrators (and inherited) or at the phase level.

Modify the form and controls

Properties

Phase: Enregistrement

Steps: 1

Review

2 routes (Gateway before review subprocess)

1	WF DEMO
✓	(Défaut)

Settings

< Back < Process settings

Mark tasks as "Late" after a certain time

Late if task exceeds (# of days)

Late if phase exceeds (# of days)

Late if process exceeds (# of days)

Remind the recipient(s) with "Late tasks"

Deactivated >

Escalate "Late" tasks to other recipients

Deactivated >

Activate Notifications and set up a given time as Late.

© Yooz 2021 - Confidential

< Back < Process settings

 Mark tasks as "Late" after a certain time ☐

Late if task exceeds (# of days)

Late if phase exceeds (# of days)

Late if process exceeds (# of days)

Remind the recipient(s) with "Late tasks"

Deactivated >

 Escalate "Late" tasks to other recipients

Deactivated >

< Back < Process settings < Mark tasks as "Late" after a certain time

Remind the recipient(s) with "Late tasks" ☐

Remind every? (# of days)


☐ Notify the initiator

☐ Notify the manager

☐ Notify the business administrator

Activate Reminder management and manage Reminder days and notified Users.

< Back < Process settings

 Mark tasks as "Late" after a certain time ☐

Late if task exceeds (# of days)

Late if phase exceeds (# of days)

Late if process exceeds (# of days)

Remind the recipient(s) with "Late tasks"

Deactivated >

 Escalate "Late" tasks to other recipients

Deactivated >

 Escalate "Late" tasks to other recipients ☐

After (# of days)

Recipient of the task following the escalation

☐ Notify the initiator

☐ Notify the manager

☐ Notify the business administrator

☐ Notify new task recipients

☐ Notify old task recipients

Activate Escalation management and manage the number of days and recipients.

■ Go to « Settings »

1



Domitille Van Dijk ▾

< Parameters & Preferences

Documents processing preferences

Document deletion >

Payment configuration

Activated >

Invoices and credits >

Configure the behavior of the application for invoices and credits

Duplicate detection >

2

Go to Parameters & Preferences →

Documents processing preferences → Duplicate detection.

< Parameters & Preferences < Documents processing preferences

Duplicate detection

Information level >

Warning level >

Error level >

3

Each Approval level can be configured independently:

- Information: non-blocking,
- Warning: blocking but can be forced (suspicion),
- Error: blocking.

< Parameters & Preferences < Documents processing preferences < Duplicate detection

Error level

4

Each control can be applied to:

- The current Organizational unit only,
- The current Organizational unit and its parents (and its hierarchy),
- The entire application (all Organizational units).

Duplicate detection scope

Third party (vendor, cu...

Document number

Document date

Document total am



Application



The checked box means "use this data as a duplicate verification key".

■ Go to « Settings »









< Settings Masterdata

Only main elements ☐

21 result(s)

Filter grid results

Name	↑	Contains	Concerned organizat
 Account types	>	3 elements	All
 Accounting periods	>	0 elements	All
Address type	>	3 elements	All
 Addresses	>	1 elements	All
 Bank accounts	>	0 elements	All
 Blocked reasons	>	7 elements	All
 Chart of accounts	>	579 elements	All

Go to Masterdata, then select Blocked reasons.

< Settings < Masterdata Blocked reasons

7 result(s)

Filter grid results

Name	↑	Code	Concerned organiz...
Duplicate		YZ_DUPLI	All
In dispute		YZ_COLIT	All
Missing or erroneous required information		YZ_COMDM	All

Click on + to create a new Blocked reason.



3

< Blocked reasons In dispute

Properties * Restrict visibility

Properties

Code * Name *

YZ_COLIT In dispute

Properties:

- Assign a Code to the Blocked reasons,
- Name the Blocked reasons.

Properties * Restrict visibility

Restrict visibility

Restrict visibility to some organizational units? Restrict visibility to some document types?

London Office x v If empty, applies to all v

Restrict visibility:

- to one or more Organizational unit(s),
- to one or more Documents types.

< Blocked reasons In dispute

Properties * Restrict visibility Active date range

Active date range

Activation date Inactivation date

12/31/1999 18:00 MM/DD/YYYY hh:mm

Active date range:

Define the period of activation of the blocked reasons.

Other settings

Setup of the refundable VAT pro rata (1/2)

■ Go to « Settings »



< Settings < Masterdata Tax profiles

5 result(s)

Name	↑	Code	Concerned organizational units
dddd		dddd	All
EXEMPT		VAT0	All
FLAT RATE		VAT12	All
REDUCED RATE		VAT5	All
STANDARD RATE		VAT20	All

Go to Masterdata then select Tax profiles.



yooz  Capture My tasks My exports Statistics

< Working Office Manchester Office

4 result(s)

Name	↑	Code	Concerned organiz...
EXEMPT		VAT0	All
FLAT RATE		VAT12	All
REDUCED RATE		VAT5	All
STANDARD RATE		VAT20	All

Select the Organizational units concerned then the Tax profiles.

Setup of the refundable VAT pro rata (2/2)

[<](#) Tax profiles STANDARD RATE

Properties * Restrict visibility Cancel Save Save as ⋮


Tax profile properties

Code *	Name *	Type	Rate	
VAT20	STANDARD RATE	Normal ▼	20.000	
Debit account	Credit account	Tax type	Tax type specific code	Tax refund percentage
14410001		Debit ▼		100.000

Mention the Tax refund percentage and do not forget to save.




Setup of the Accounting closing date (1/2)

■ Go to « Settings »    Domitille Van Dijk ✓

yooz  Capture My tasks My exports Statistics

< Settings Organizational units

3 result(s)

Name	↑	Code	Completion rate
London Office		LON	
Manchester Office		MAN	
Woking Office		WOK	

Go to Organizational units then select the Organizational unit concerned.



yooz  Capture My tasks More ▾

Search

< Organizational units London Office

Properties * Identification data Settings Masterdata Dimension

Only main elements ☐

Name	Content
 Account types	> (Globalized, 3 elements)
 Accounting periods	> (Globalized, empty)
Address type	> (Globalized, 3 elements)

Once the Organizational unit has been selected, go to the Masterdata tab and click on Accounting periods.

Setup of the Accounting closing date (2/2)

< London Office Default accounting periods

No results

Name	↑	Code	Concerned organiz...
------	---	------	----------------------

Click on + to create a new period.

< Create

Properties * Restrict visibility Cancel Create

Properties

Code * Name *

Accounting periods properties



Accounting period start  End of accounting period  Accounting closing period 

Affect a Code and a Name, mention a start and end date of the period, then the closing date of the period.





< Create

Properties * Restrict visibility Active date range

Restrict visibility

Restrict visibility to some organizational units?  Restrict visibility to some document types? 

Active date range

Activation date  16:47  Inactivation date  hh:mm 

Apply the closing date to one or more of your Organizational units and / or Document types.

Possibility to define the Active date range.

Questions / Answers