

# Yooz Rising Training - Business Edition

## Module 6: Multichannel Capture

# Objective and duration of the training

## ■ Objective of the training

- Provide the knowledge to master multichannel document Capture.

## ■ Prerequisites

- None.

## ■ Targeted Audience

- This training is addressed to the accountants and capture agents.

## ■ Duration

- 30 minutes.

## ■ Capture Workspace


- Display settings
- Manual document import
- Automatic splitting
- Interactive splitting suggestions





## ■ Capture your documents



- Using a YoozBox
- Using Email Capture
- Using the Automated Invoice Collector
- Using mobile Capture


# Capture Workspace

## ■ Configure the display of the Capture Workspace

yooz  Capture My tasks My exports Statistics

Search    9+  Sergio ▾

Capture ( All my organizational units )  

File upload >  Split suggestions >

131 result(s)

Capt... ▾	Capture date	Filename	Number of docum...	Organizational unit
131	21/01/2021 14:57:32	Test_multipages.pdf	3	Pharmacie Online
130	21/01/2021 14:57:32	fact_test1_Auchan.pdf	1	Pharmacie Online

Organizational unit \* (?) ▾ Document type \* (?) ▾

Drop files here to import them or [Select a file](#)

Split options Document options

Email capture > YoozBox Configuration > Automated Invoice collector >

Resize...

Split suggestions > No results

Refresh Components selection...

Resize

Size

M XS S M L XL

Components selection

Component name

Selection

- ☒ File upload
- ☒ Split suggestions
- ☒ Email capture
- ☒ YoozBox Configuration
- ☒ Automated Invoice collector
- ☒ Imported files

Cancel OK

To import your documents, select the Capture Workspace.

File upload >

Import

Organizational unit \*

Document type \*

(?)

(?)

Drop files here to import them or

Select a file

Split options

Document options

Email capture >

YoozBox Configuration >

Automated Invoice collector >

Imported files >

131 result(s)

Capt...	Captu...	Filename	Number of docum...	Organizational unit	Document type	Capture source	Capture channel	Imported by	Alert	Split
		Test_multi...			Payable invoice - no ...	Manual import		Sergio		
		fact_test1...			Payable invoice - no ...	Manual import		Sergio		

Search

Q

9+

Sergio

Capture

My tasks

My exports

Statistics

Capture ( All my organizational units )

Split suggestions >

No results

Open

Capture data

Suggested Docum...

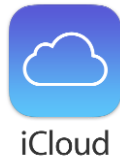
Organizational unit

Manual import.

Configuration of Email Capture.

Pairing of the YoozBox.

Configuration of the Automated Invoice collector.



- Requirement:
  - Size limit: 20MB
- Users with the appropriate role will see the File upload section

**File upload** >

The "Drag and Drop" functionality allows you to select one or more files from your computer or your mailbox and drag them directly into this area to import them.

Organizational unit \*  
(?)

Document type \*  
(?)

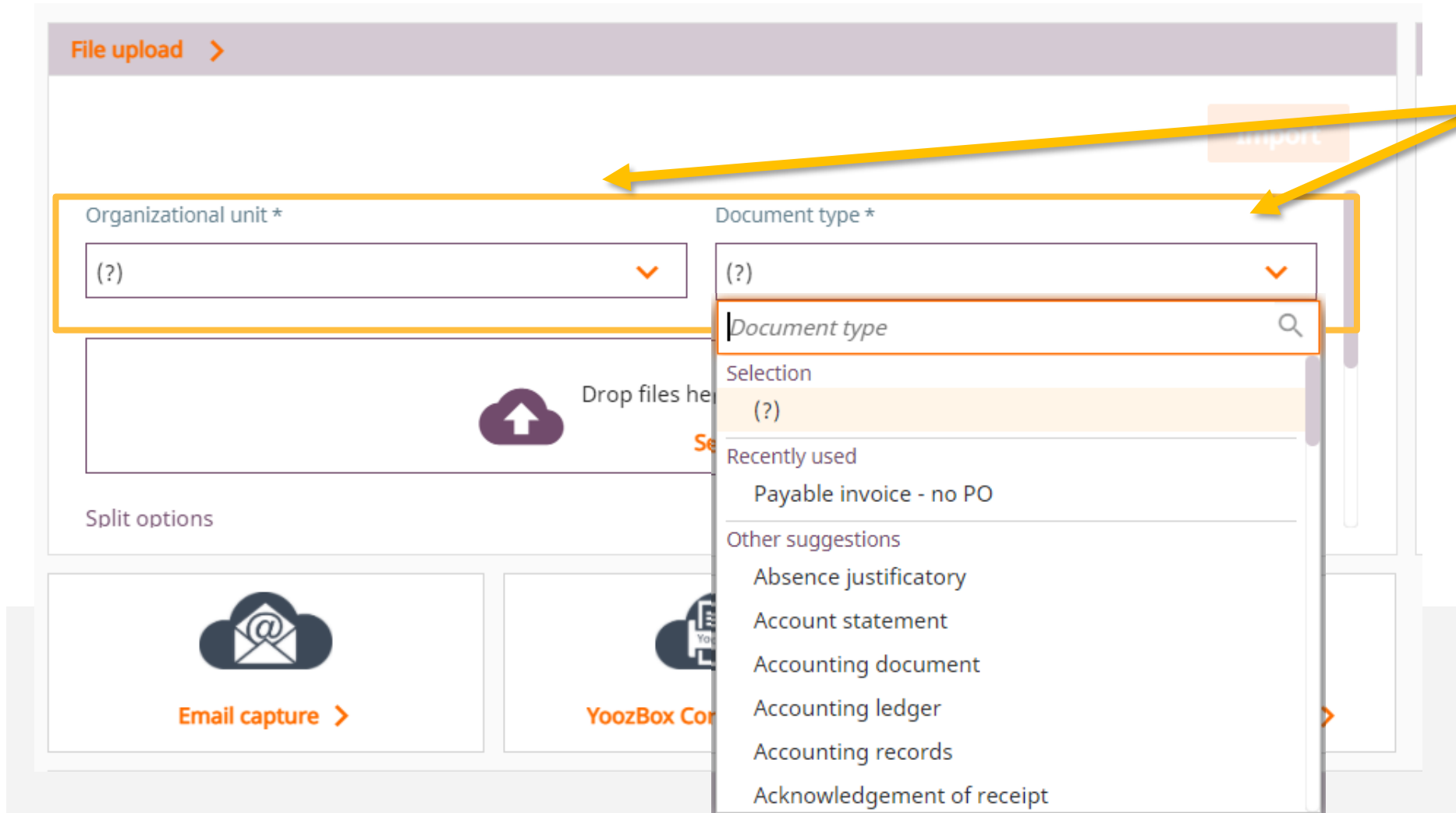
Drop files here to import them or  
**Select a file**

Split options      Document options

**Email capture** >      **YoozBox Configuration** >      **Automated Invoice collector** >

\*Thick client inbox | Dropbox, Google Drive, Amazon Drive, ... locally synced

# Manual document import from any source into Yooz\*(2/2)



File upload >

Import

Organizational unit \*

(?)

Document type \*

(?)

Drop files here

Split options

Email capture >

YoozBox Com

Document type

Selection

(?)

Recently used

Payable invoice - no PO

Other suggestions

Absence justificatory

Account statement

Accounting document

Accounting ledger

Accounting records

Acknowledgement of receipt

Choose the Organizational unit to feed and the Document type to import.

"(?)" allows to let Yooz automatically identify the Organizational unit and / or the Document type.



File upload >

Import

Split options

☐ None
☒ Automatic
☐ Every 2 page(s)

☒ Validate the split before creating the documents

Document options

☐ Combine in a single document?

Additional data ^

Name

Third party (vendor, customer...)

Document number

Document date

Due Date

Configuration >

Automated Invoice collector >

131 result(s)

Capt... ↓	Capture date	Filename	Number of docum...	Organizational unit
131	21/01/2021 14:57:32	Test_multipages.pdf	3	Pharmacie Online

## Cutting options:

### Automatic split

#### 1. YoozSmartSplit

- Documents must be of good quality and properly scanned.
- Within a batch being subject to an automatic splitting, the invoices must be well sorted (front side first, consecutive pages).
- Invoices must contain the invoice number on all pages.
- You must not put two invoices from the same supplier one after the other.
- Invoices must all belong to the same Yooz Organizational unit.
- You can't insert any attachment or appendix (eg detail of consumptions).
- All invoices must be scanned in a double-sided mode.
- Invoices can't be longer than 10 pages.
- Bundles of invoices must not exceed 10 invoices.

#### 2. YoozStamp

#### 3. A blank sheet inserted between each invoice.

### Fixed splitting

Only for documents with the same number of pages.

Option to pre-enter additional data on an invoice or on a batch of invoices.

Capture ( All my organizational units )

File upload >

Drop files here to import them or  
Select a file

Split options

☐ None
☒ Automatic
☐ Every 2 page(s)

Document options

☐ Combine in a single document?

☒ Validate the split before creating the documents

YoozBox Configuration >

Email capture >

Automated Invoice collector >

Split suggestions >

1 result(s)

Open

<input type="checkbox"/>	Capture date ↓	Filename	Suggested Docum...	Organizational unit
<input type="checkbox"/>	13/04/2021 17:47:49	BRITISH GAS INVOICE 280872308.pdf	2	London Office

Imported files >

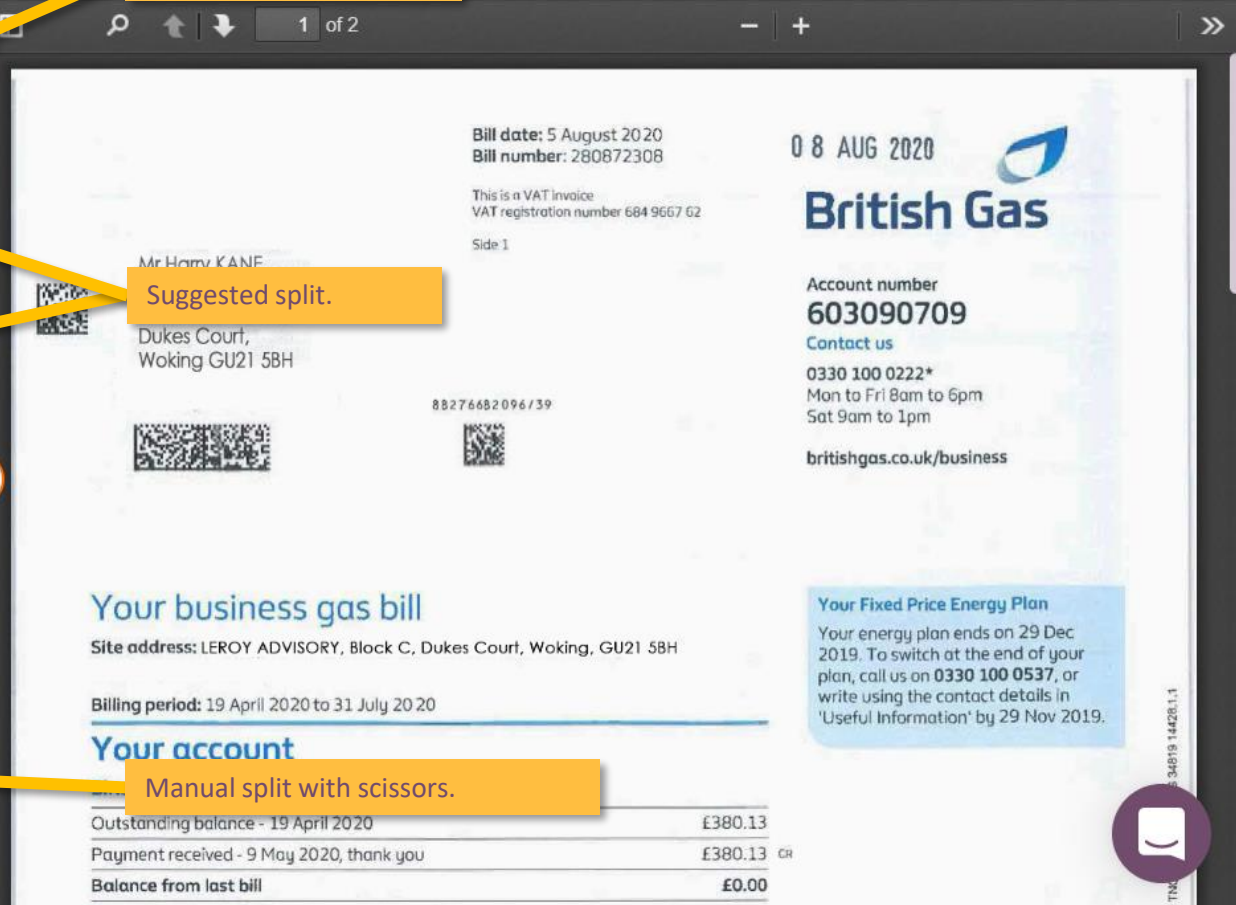
80 result(s)

Capt... ↓	Capture date	Filename	Number of docum...	Organizational unit	Document type	Capture source	Capture channel	Imported by	Alert
80	13/04/2021 17:47:49	BRITISH GAS INVOICE 280872308.pdf	0	London Office	Payable invoice - no ...	Manual import		Yooz Customer Succ...	Pending split validation

If you have activated the approval of automatic split, then the split suggestions will be displayed in this list.

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## Deleting a page.



# Capture your documents

## ■ Preparation of documents

- The documents you are going to scan must be clean, free of any staples, tape or any other element that could interfere with the passage of the sheets through the scanner or their scanning.

## ■ Adjusting the scanner guides

- The registration strips must be adjusted to the size of the document to ensure optimal guidance. Documents should preferably be grouped by size. Very small documents (receipts, etc.) must be scanned separately.

## ■ Adjusting the thickness cursor

- Choose one of the 2 cursor positions depending on the thickness of the documents you are going to put into the scanner.



## ■ Insertion of your documents in the YoozBox

- Insert the documents into the feeder from the top of the form with the written side facing the scanner.
- The scanner allows you to scan original documents consisting of one or more sheets. You can put up to 20 sheets of 80 g / m<sup>2</sup> in the feeder.

## ■ For your purchase invoices:

- " **1 Fact. ACH** " to scan 1 single purchase invoice with 1 or more double-sided pages.
- " **Multi-fac ACH 1p** " to scan 1 batch of several purchase invoices of 1 double-sided page.
- " **Multi-fac ACH 2p** " to scan 1 batch of several purchase invoices of 2 double-sided pages.
- " **1 Have ACH »For your purchase credits:** to scan 1 single purchase credit note including 1 or more double-sided pages.



## ■ Select the Yooz service

- Scroll through the services by pressing the button below the screen.

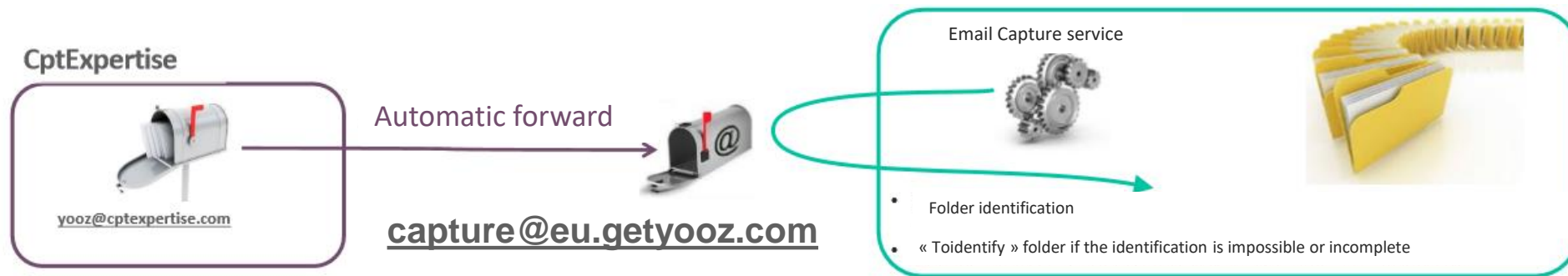


## ■ Press the "Send" button

- Your invoices are scanned and automatically integrated into your Yooz file.



- Email Capture allows you to directly send your invoices to your Yooz application.
- There are 2 major use-cases:
  - A third party sends their invoices to a dedicated mailbox that you have communicated to them.
  - You scan your invoices using a copier that sends e-mails to this dedicated mailbox.
- These invoices are automatically captured and made available in the corresponding Organizational unit in your Yooz application.



- Learn more in this Help Center article : [read me](#)



# Using the Automatic Invoice collector

■ To guarantee automatic collection for 100% of your suppliers, Yooz combines 2 approaches:

- Automatic Invoice collection from your vendors' web site.
- Automatic Invoice collection from your e-mail address referenced in your vendors' web site.

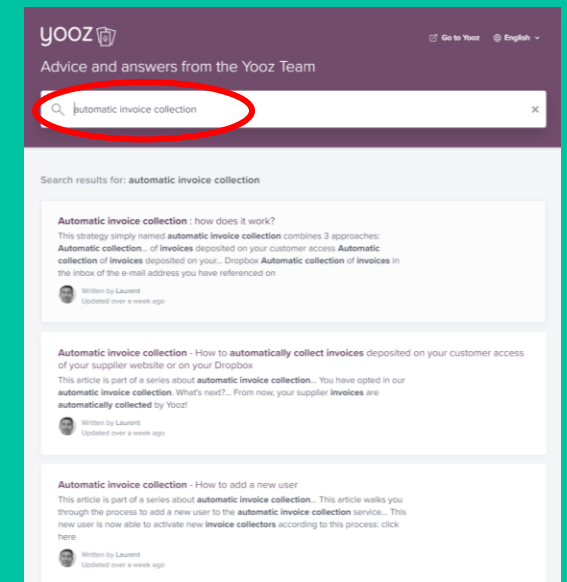
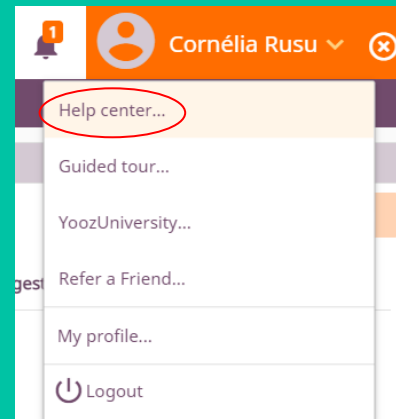
## Let's practice:

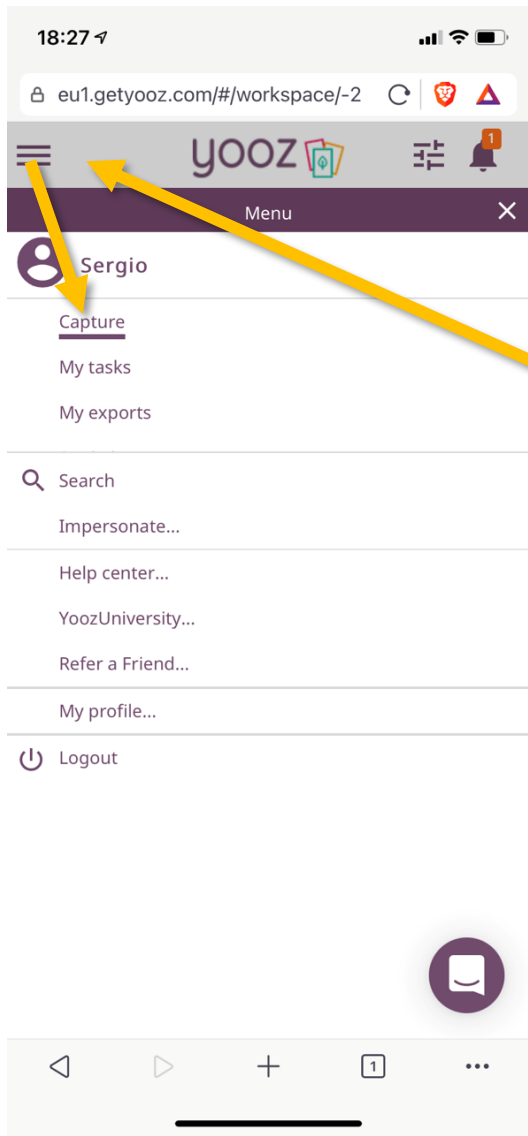
- Connect to your application and let you guided by our Help center article by clicking below:

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

OR




- Log into your application, go to your Help center then do a Search with the following keywords: "automatic invoice collection".













■ Yooz uses "Responsive design" technology to adapt to the size of your screen.

To import documents, pull down the menu and choose the Capture Workspace.

18:28   


eu1.getyooz.com/#/workspace/~2   

 yooz   


File upload 


Import

Organizational unit \*

(?) 

Document type \*

(?) 

 Select a file


Split options


☐ None ☒ Automatic ☐ Every 2 page(s)


☒ Validate the split before creating the documents






Document options

☐ Combine in a single document?

Additional data 












 Select a file


Photo Library   Select an existing photo of your invoice.


Take Photo or Video   2 page(s) Take a picture of your invoice.

Browse   Browse your device to select a file.

Document options

☐ Combine in a single document?

Additional data 



# Questions / Answers