

# Yooz Rising training – Business Edition

## Module 7: Document Review

# Objective and duration of the training

## ■ Objective of the training

- Provide the knowledge allowing to review documents in Yooz Rising.

## ■ Prerequisite

- None.

## ■ Targeted audience

- This training is for accountants.

## ■ Duration

- 45 minutes.

## ■ Access and introduction to the screens

- Introduction to the Workspace « My Tasks »
- Customization of the Workspace « My Tasks »
- Completed documents

## ■ Coding your documents

- Invoices Review screen
- Documents' header
- Optimization of the Third-party sheet
- Allocation of invoices and click&reco
- Other documents


## ■ Interactions et actions

- Inside task action buttons
- History of the document
- Attachment of a document
- PDF display
- Error message
- Highlight colors





## ■ Export your documents

## ■ Questions / Answers

# Access and introduction to the User interface

yooz

CaptureMy tasksMore ▾

    Domitille Van Dijk ▾

My tasks ( All my organizational units )

1Late >

18Complete >

0Blocked >

0In progress >

To do >

The administrator can define processing delays for the Approval of invoices. Once these delays passed, the invoices appear in the « Late » Component.

The « Complete » component allows to view the invoices with the fields completed by the User or automatically by the Yooz. It allows to process a group of documents in a row.

A Blocked document is a document Blocked during the process (during the Review step or the Approval step). It is Blocked when there is a mistake (for instance: mistake on the price, the quantity...).

The documents processed by the User and waiting for being processed by another User are visible in the Component « In progress ».

Completion rate

Task

Alert

Third party (vendor...

Docume

4

Payable invoice - no PO 213900 (OFFICLEAN)

☐

5

Payable invoice - no PO 19400 (TAUTLINERS ...)

☐

●

Review

●

Review

●

Review

●

Review

●

Review

AUTOSMART

HGV DIRECT (HGV)

ABS BURTON LTD (A...

OFFICLEAN

TAUTLINERS UK LIM...

28/04/:

09/12/:


09/12/:


07/12/:





03/12/:

Open

Delete



**yooz**  Capture **My tasks** More ▾

Search      Domitille Van Dijk ▾

**My tasks ( All my organizational units )** Access to all the documents to follow / treat.

**1** Late >

**18** Complete >

**0** Blocked >

**0** In progress >






**To do** Automatic display of the Component « To do », otherwise select the requested Components (Complete, Blocked...) just above the block.

5 / 21 results

Organizational unit

- London Office 5
- Manchester Office 5

Select the Organizational unit or a Document type (if the grouping is active).


<input type="checkbox"/>	Rank ↑	Name	Completion rate	Task	Alert	Third party (vendor...	Docume
<input type="checkbox"/>	1	Payable invoice - no PO 1103421 (AUTOSMA...		Review		AUTOSMART	28/04/;
<input type="checkbox"/>	2	Payable invoice - no PO 1857034 (HGV DIRE...		Review		HGV DIRECT (HGV)	09/12/;
<input type="checkbox"/>	3	Payable invoice - no PO BI677127 (ABS BUR...		Review		ABS BURTON LTD (A...	09/12/;
<input type="checkbox"/>	4	Payable invoice - no PO 213900 (OFFICLEAN)		Review		OFFICLEAN	07/12/;
<input type="checkbox"/>	5	Payable invoice - no PO 19400 (TAUTLINERS ...		Review		TAUTLINERS UK LIM...	03/12/;


Percentage of field completion. A 100% rate is an indicator of full completion and of the ability to finalise the Review step. The document is then placed in the « Complete » Component.

Click on « Open » to open the selected document(s) (tick the case) or directly click on the document to treat.

Mark the important Alerts in the process of documents (Late, Blocked...).

**Open** **Delete**




yooz


Capture


My tasks


More ▾

Search







 Domitille Van Dijk ▾

My tasks ( All my organizational units )

<

0  
Blocked >

0  
In progress >

Filter by

Organizational unit

To c

5

Document type

Org

Lo

Third party (vendor, customer...)

M

Date interval

From

DD/MM/YYYY

To :


DD/MM/YYYY

Reset

This window will allow you to obtain a detailed view with only the documents you are interested in.

	Completion rate	Task	Alert	Third party (vendor...	Docume
1		Review		AUTOSMART	28/04/;
2		Review		HGV DIRECT (HGV)	09/12/;
3		Review		ABS BURTON LTD (A...	09/12/;
4		Review		OFFICLEAN	07/12/;
5		Review		TAUTLINERS UK LIM...	03/12/;



yooz

Capture

My tasks

More

Search

Domitille Van Dijk

My

Organizational units

3

The grouping results are shown on the left of the screen. Here, below, a grouping of Organizational units.

18

Completed

0

In progress

0

In progress

To do

5 / 21 result(s)

London Office

5

Manchester Office

5

Woking Office

11

2

Choose amongst a large list of criteria (Organizational unit, Document type, Due date...).

Columns selection

Column name

Selection

☒ Rank

☒ Name

☒ Task

☒ Alert

☒ Organizational unit

☒ Third party (vendor, customer...)

☒ Document date

☒ Net amount (excl. tax)

☒ Total amount (incl. tax)

☒ Currency

Cancel

OK

1

Group the documents by criteria in order to organise your Workspace.

Task

Alert

Review

Review

Review

Review

Review

Resize...

Group by...

Sort by...


Columns selection...

Reset view

OFFICLEAN 07/12/:


TAUTLINERS UK LIM... 03/12/:




yooz


Capture


My tasks



More 

Search







 Domitille Van Dijk 

My tasks ( All my organizational units )

1Late >

18Complete >

0Blocked >

0In progress >

To do >

5 / 21 result(s)

Organizational unit

London Office5

Manchester Office5

Woking Office11

<input type="checkbox"/>	Rank ↑	Name	Completion rate	Task	Alert
<input type="checkbox"/>	1	Payable invoice - no PO 1103421 (AUTOSMA...	<div></div>	Review	
<input type="checkbox"/>	2	Payable invoice - no PO 1857034 (HGV DIRE...	<div></div>	Review	
<input type="checkbox"/>		UR...	<div></div>	Review	
<input type="checkbox"/>		AN)	<div></div>	Review	
<input type="checkbox"/>		ERS ...	<div></div>	Review	

Columns selection

Column name

Selection

☒ Rank

☒ Name

☒ Task

☒ Alert

☒ Organizational unit

☒ Third party (vendor, customer...)

☒ Document date

☒ Net amount (excl. tax)

☒ Total amount (incl. tax)

☒ Currency

Cancel

OK

1

Customize the display of the Columns in the Component. See only the information that you are interested in.

3

The columns are displayed as selected.

2

Select columns to display and their location. The selected columns located above the pin will be frozen on the screen.


Columns selection...





Resize...



Group by...

Sort by...

Reset view

yooz  Capture **My tasks** More ▾

Search     Domitille Van Dijk ▾


My tasks ( All my organizational units )  

1 Late >

**18 Complete >**

0 Blocked >

0 In progress >






To do > 



5 / 21 result(s)


Organizational unit


- London Office
- Manchester Office**
- Woking Office





The component "Complete" allows to view the invoices with all the fields completed by the User or automatically by Yooz. It allows to bulk Review a group of documents.

Rank ↑	Name	Completion rate	Task	Alert	Third party (vendor...	Docume
1	Payable invoice - no PO TE085902 (BEW)		Review		BEW	09/12/:
2	Payable invoice - no PO 9649755 (INFOCUS I...		Review		INFOCUS ID LTD (24...	10/06/:
3	Payable invoice - no PO BR661501 (KEW ELE...		Review		KEW ELECTRICAL (K...	12/06/:
4	Payable invoice - no PO 0000826127		Review			01/06/:
5	Payable invoice - no PO URI125268		Review			01/06/:




Capture
**My tasks**
More ▾





Domitille Van Dijk ▾

< My tasks
Complete ▾
( All my organizational units )
↻
⋮

>
18 result(s) , 3 selections

Process > Task

Payables invoice/credit process 18
Review

☒
☒
☒

Rank ↑

Name

Alert

Organizational unit

Third party (vendor...)

Document date

Net amount

1 Payable invoice - no PO 280872308 (BRITISH...

2 Payable invoice - no PO 0011IW (BT)

3 Payable invoice - no PO IN04751049 (BT)

4 Payable invoice - no PO 8402236846 (DE...

5 Payable invoice - no PO 0514724 (EDF ENER...

6 Payable invoice - no PO 1707 (ORBIT PARTN...

7 Payable invoice - no PO 9059743890 (ROYAL ...

8 Payable invoice - no PO 39020405 (SYMANTEC...

9 Payable invoice - no PO 915451 (VIRGIN MO...

10 Payable invoice - no PO 30939 (WDG AZURE)

11 Payable invoice - no PO TE085902 (BEW)

12 Payable invoice - no PO 9649755 (INFOCUS I...

Woking Office

Woking Office

Woking Office

Woking Office

Woking Office

Woking Office

Woking Office

Woking Office

Woking Office

Woking Office

Manchester Office

Manchester Office

BRITISH GAS

BT

BT

DELL

EDF ENERGY (EDF)

ORBIT PARTNERS (O...

ROYAL MAIL

SYMANTEC

VIRGIN MOBILE

WDG AZURE

BEW

INFOCUS ID LTD (24...

05/08/2020

24/02/2020

10/08/2020

25/05/2020

10/07/2020

19/06/2020

21/06/2020

03/06/2020

01/06/2020

17/07/2020

09/12/2020

10/06/2020

Click on « Open » to preview the documents or directly on « Process automatically ».

Process automatically







Open

Delete


Select to process automatically a group of documents in a row. Only the selected documents having all the fields identified and completed will appear in the list.




# Reviewing documents

**yooz**  Capture **My tasks** More  Search    Domitille Van Dijk 



**< To do Payables invoice/credit review, Review (Yooz # 77)**

Document \* **Entries [Yooz Standard CSV]** 



**Properties** 

Name \*

Payable invoice - no PO 1103421 (AUTOSMART)

Organizational unit \*  Document type \* 



London Office (LON) Payable invoice - no PO


Vendors \*  AP / AR account \* 

AUTOSMART Standard Supplier (401000)


Payment method \* Document date \*


**Invoice line(s)**


Account *	Net amount (excl. tax) *	Tax code *	Tax amount *	Total amount (incl. tax) *	Line description	Department
  AUTOMOBILE ADDITIONS (27...	454.16	STANDARD RATE (VAT20)	90.83	544.99	AUTOSMART du 28/04/20	Sales (D2)
	454.16		90.83	544.99		


**Dynamic view of the document's pages.** 


**Document's header.**

**Document action buttons.** 

**Action buttons to interact with the Invoice.** 

**Action buttons of the PDF viewer.** 

**Allocation lines when the document is an invoice or a credit note.** 



Close Submit Forward... ⋮

Other data for non PO invoices

Custom field #1

The elements recently used are listed in the upper selection.

Document No. : INV02852  
Room : 08  
Booking : BK23634/1/1  
Arrival : 10/Jun/2020  
Departure : 11/Jun/2020

Date	Description	Quantity	Value Each	Value Total
10/Jun/2020	BEST AVAILABLE RATE - B&B	1	69.00	69.00
Balance Due:				69.00

**Please make cheques payable to Farnham House Hotel**

## Tax Analysis

Tax Code	Tax Code Description	Nett	Tax	Gross
VAT_20	UK VAT	57.50	11.50	69.00
VAT Reg	190 023 988			

**Signature:**

Date:     /     /

Document \* Entries [Yooz Standard CSV]

Mandatory fields : (Invoice line(s)) Account

Properties

Pay

Orga

Docu

Paym

Vendors \*

AP / AR account \*

Payment method \*

Document date \*

Document number \*

Reception date \*

Net amount (excl. tax) \*

Tax amount \*

Total amount (incl. tax) \*

Currency \*

Description

FARNHAM HOUSE HOTEL

Standard Supplier (401000)

Direct debit (PRE)

10/06/2020

INV02852

14/01/2021

57.50

11.50

69.00

Pound Sterling (GBP)

yooz Capture My tasks My exports Statistics

Vendors Vendors

Accept Yooz's suggestions.

Identification data

Identification data (visible on the document)

Disable automated identification for this element

Name

Siret, EIN, CIF/NIF, ...

Siren, business ID, ...

Tax ID number, ...

Address (1st line)

Address (2nd line)

Zip code

City

State

Country

Phone number

Fax number

Email address

FARNHAM HOUSE HOTEL

AltonRoad (A31)

GU10 5ER

Farnham

Surrey

United Kingdom of Great Britain and Northern Ireland (GB)

01252 716908

reservations@farnhamhousehotel.com

Search [ ] [ ] [ ] [ ] Domitille Van Dijk

Cancel Save Save as

Farnham House Hotel  
Alton Road (A31)  
Farnham  
Surrey  
United Kingdom  
01252 722583  
reservations@farnhamhousehotel.com

Mr Harry KANE Document No. : INV02852  
Room : 08  
LEROY ADVISORY Booking : BK23634/1/1  
Block C 0020

Date	Description	Quantity	Value Each	Value Total
10/06/2020	BEST AVAILABLE RATE - B&B	1	69.00	69.00

Tax Analysis

Tax Code	Tax Code Description	Nett	Tax	Gross
VAT_20	UK VAT	57.50	11.50	69.00
VAT Reg	190 023 988			

Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

At the Review stage, you simply need to click on the flag to optimize the Vendor's profile. Three levels of colours (green, orange, red) depending on the Completion rate.

Bold data have been read on the document.

Possibility to accept one suggestion only: mouse hover over the cell and click on the arrow.

Differences between suggestions and data read on the document are highlighted by exclamation points.

Accept the suggestion



yooz
Capture
My tasks
My exports
Statistics

Search
Payables invoice/credit review, Review (Yooz # 78) Late

Document \* Entries [Yooz Standard CSV]

Mandatory fields : (Invoice line(s)) Account

Properties
Name \*
Payable invoice - no PO INV02852 (FARNHAM HOUSE HOTEL)
Organizational unit \*
Working Office (WOK)
Vendors \*
FARNHAM HOUSE HOTEL
Payment method \*
Direct debit (PRE)
Document number \*
INV02852
Net amount (excl. tax) \*
57.50
Total amount (incl. tax) \*
69.00
Currency \*
Pound Sterling (GBP)

Document type \*
Payable invoice - no PO
AP / AR account \*
Standard Supplier (401000)

+ Add
Duplicate
Delete

Code de TVA
Sélection
TVA Exonérée (TEXO)
Récemment utilisés
TVA déductible à 20% (T20)
Autres suggestions
TVA Collectée 10% (TC10)
TVA Collectée 2,1% (TC21)
TVA Collectée 20% (TC20)
TVA Collectée 5,5% (TC55)
TVA déductible à 10% (T10)
TVA déductible à 2.1% (T210)
TVA Exonérée (TEXO)

Definition of the allocated amount. Integrated calculator available (start the operation by an "=").

Farnham House Hotel
Alton Road (A31)
Farnham
Surrey
United Kingdom
GU10 5ER
01252 716908
01252 722583
reservations@farnhamhousehotel.com

Mr Harry KANE
Document No. : INV02852
Room : 08
Booking : BK23634/1/1
Arrival : 10/Jun/2020
Departure : 11/Jun/2020
GU21 5BH

Date	Description	Quantity	Value Each	Value Total
10/Jun/2020	BEST AVAILABLE RATE - B&B	1	69.00	69.00
			Balance Due:	69.00

Tax Analysis
Tax Code
Tax Code Description
VAT\_20
UK VAT
VAT Reg
190 023 988

Net
57.51
Tax
1.49
Gross
59.00

Automatic recognition of the document and prefill of the fields.

List of potential values.

Create a new account in the Masterdata.

Net amount (excl. tax) *	Tax code *	Tax amount *	Total amount (incl. tax) *	Line description	Department	Cost Code
=57.5/2	STANDARD RATE (VAT20)	11.50	40.25	FARNHAM HOUSE HOTEL du ...	Admin (D4)	

28.75 (Balance: 28.75)

Balance is in red when the amounts allocated don't match with the Total amount of the invoice.


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06/01/2021

Use the Click & Reco technology by selecting or multi-selecting the data on the image (automatic sum of the multi-lines amounts). To this end, maintain the click and drop the selection on one or several amounts. The sum will be calculated automatically.

Adm415.33

yooz

Capture

My tasks

More

Search

Domitille Van Dijk

< Complete

Payables invoice/credit review, Review (Yooz # 63)

1/18

Possibility to save the document data. Some of the fields on the header and the allocation schema of the invoice will be saved for the next invoices.

2

Information

Do you want Yooz to learn this data for next documents ?

Yes

No

1

Submit the Invoice and send it to the next step of the Workflow.

Close

Submit

Forward...

Properties

Name \*

Payable invoice - no PO 280872308 (BRITISH GAS)

Organizational unit \*

Woking Office (WOK)

Vendors \*

BRITISH GAS

Payment method \*

Direct debit (PRE)

Document number \*

280872308

Document type \*

Payable invoice - no PO

AP / AR account \*

Standard Supplier (401

Document date \*

05/08/2020

Reception date \*

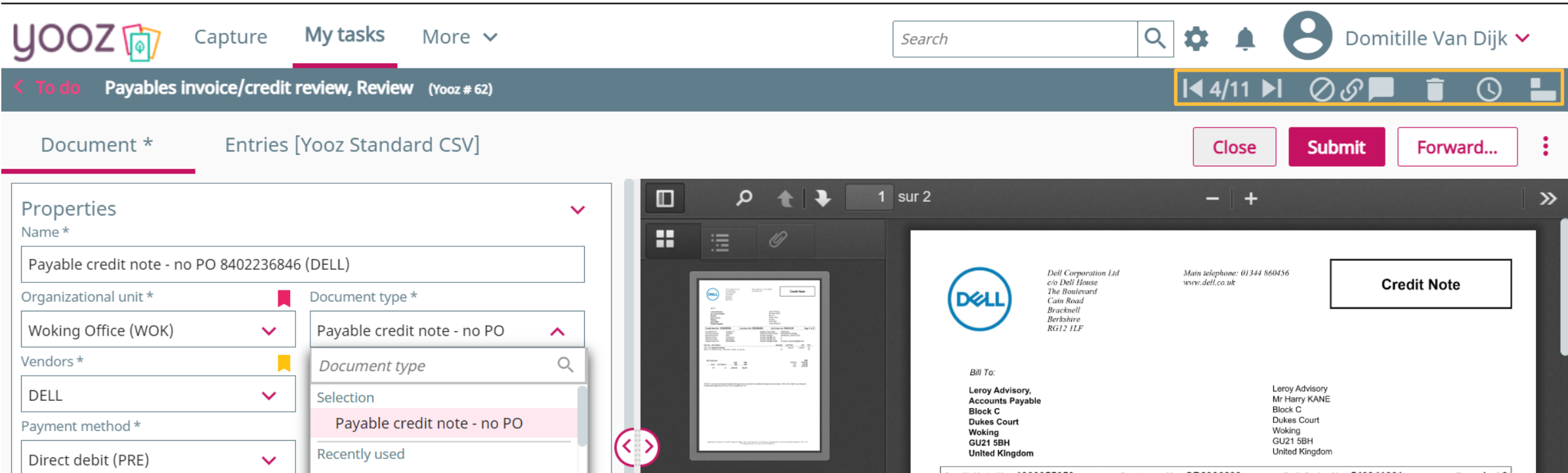
06/01/2021

Invoice line(s)

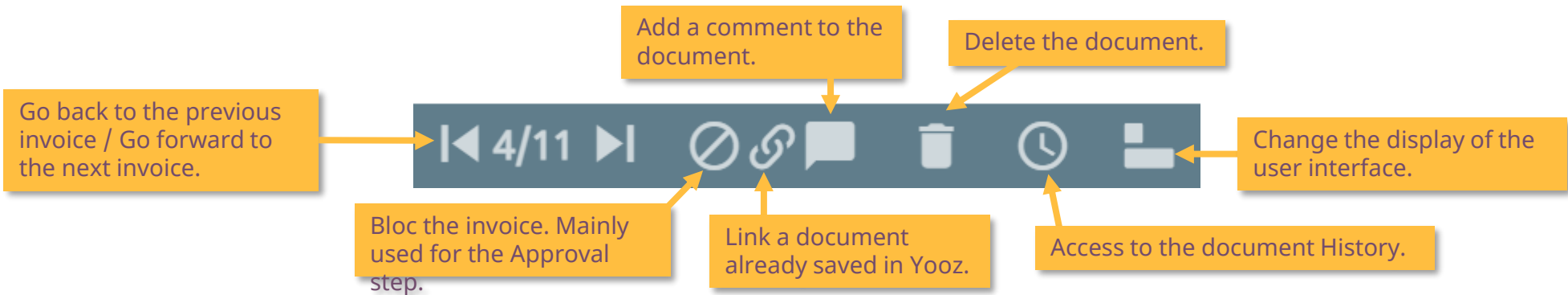
Account *	Net amount (excl. tax) *	Tax code *	Tax amount *	Total amount (incl. tax) *	Line description	Department
+ ACCUMULATED DEPRECIATIO...	395.56	REDUCED RATE (VAT5)	19.77	415.33	British Gas du 05/08/20	Adm
	395.56		19.77	415.33		

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# Interactions and actions







The screenshot shows the Yooz interface with the 'My tasks' tab selected. The task is 'Payables invoice/credit review, Review (Yooz # 62)'. A toolbar at the top right of the task area contains several icons: a left arrow, '4/11', a right arrow, a blocked icon (a circle with a diagonal line), a link icon (two overlapping circles), a comment icon (a speech bubble), a trash icon, a clock icon, and a document icon. An orange arrow points to this toolbar. Below the toolbar, there are buttons for 'Close', 'Submit', and 'Forward...'. The main area displays a 'Credit Note' document from Dell Corporation Ltd, with details about the bill to and the vendor.













yooz Capture My tasks More ▾




Search 

   Domitille Van Dijk ▾

< Complete Payables invoice/credit review, Review (Yooz # 63) 1/18      

yooz Capture My tasks More ▾


Search 

   Domitille Van Dijk ▾


< History, Payable invoice - no PO 280872308 (BRITISH GAS) (Yooz # 63) >>





Hide advanced timeline ☒





This document is available to be processed by: baseukdvd admin, Domitille Van Dijk, Emily Vinson, Florian Noiret, Julie Breton, Paying Agent, Vincent Emel, Vincent Mas

06/01/2021 11:28  Process cancellation - Payables invoice/credit process

09/02/2021 17:02

28/02/2021 15:45  Payables invoice/credit review - Review , Domitille Van Dijk

    1 sur 2 - + >>

    1 sur 2 - + >>

British Gas

0 8 AUG 2020

Bill date: 5 August 2020  
Bill number: 280872308

This is a VAT invoice  
VAT registration number 684 9667 02

Side 1

Mr Harry KANE  
LEROY ADVISORY,  
Block C,  
Dukes Court,  
Woking GU21 5BH

88276682 096 / 39

Account number  
603090709

Contact us  
0330 100 0222\*  
Mon to Fri 8am to 6pm  
Sat 9am to 1pm  
britishgas.co.uk/business

Your business gas bill

Site address: LEROY ADVISORY, Block C, Dukes Court, Woking, GU21 5BH

Billing period: 19 April 2020 to 31 July 2020

Your account

Since your previous bill

Outstanding balance - 19 April 2020 £380.13

Payment received - 9 May 2020, thank you £380.13

Balance from last bill £0.00

New charges this bill (see over for details)

Gas charges £318.60

Standing charges £76.96

Your Fixed Price Energy Plan


Your energy plan ends on 29 Dec 2019. To switch at the end of your plan, call us on 0330 100 0537, or write using the contact details in 'Useful Information' by 29 Nov 2019.





Close

Audit trail








Access to the Audit trail.

Details of the modifications done on the document.



Capture
**My tasks**
More ▾









Domitille Van Dijk ▾

< Complete
Payables invoice/credit review, Review
(Yooz # 63)

1/18








Document \*
Entries [Yooz Standard CSV]


Selection of the criteria to search documents to link.
2 ▾





Domitille Van Dijk ▾

< Link with other documents

×
Search

5 result(s)
5 Link the selected documents
Link

<input type="checkbox"/>	Yooz Numb... ▾	Name	Alert	Document date	Total amount (incl. ...	Task	Potential roles	Potential users	Po
<input type="checkbox"/>	77	Payable invoice - no PO 1103421 (AUTOSMA...		28/04/2020	544.99	Review (Payables in...	Accountant, Extend...		
<input type="checkbox"/>	76	Payable invoice - no PO 213900 (OFFICLEAN)		07/12/2020	683.86	Review (Payables in...	Accountant, Extend...		
<input type="checkbox"/>	75	Payable invoice - no PO 1857034 (HGV DIRE...		09/12/2020	45.35	Review (Payables in...	Accountant, Extend...		
<input type="checkbox"/>	74	Payable invoice - no PO 19400 (TAUTLINERS ...		03/12/2020	120.00	Review (Payables in...	Accountant, Extend...		
<input type="checkbox"/>		PO BI677127 (ABS BUR...		09/12/2020	22.10	Review (Payables in...	Accountant, Extend...		
					395.56	19.77	415.33		

Selection of the document(s) to link.
4

Possibility to select the display mode. On this example, the Landscape display mode is used.





Capture

My tasks

More ▾

Search



Domitille Van Dijk ▾

< Complete Payables invoice/credit review, Review (Yooz # 63)

1/18 ▶



Document \*

Entries [Yooz Standard CSV]

Close

Submit

Forward...



### Properties

Name \*

Payable invoice - no PO 280872308 (BRITISH GAS)

Organizational unit \*

Woking Office (WOK) ▾

Document type \*

Payable invoice - no PO ▾

Vendors \*

BRITISH GAS ▾

AP / AR account \*

Standard Supplier (401000) ▾

Payment method \*

Direct debit (PRE) ▾

Document date \*

05/08/2020 

Document number \*

280872308

Reception date \*

06/01/2021 

PDF viewer interface showing a document titled "Your business gas bill". The viewer includes navigation controls (back, forward, search, zoom) and a right-hand menu with options: Print, Split file, Email, Download, Aller à la première page, Aller à la dernière page, and Rotation horaire. Overlaid on the document are four yellow callout boxes with arrows pointing to the menu options: "Print the invoice." (points to Print), "Split the file's pages." (points to Split file), "Send by Email through" (points to Email), and "Download the invoice." (points to Download). The document content includes a QR code, a meter number (88276682096/39), and the text "Your Fixed Price Energy Plan".

### Invoice line(s)

	Account *	Net amount (excl. tax) *	Tax code *	Tax amount *	Total amount (incl. tax) *	Line description	Department
+ ▾	ACCUMULATED DEPRECIATIO...	395.56	REDUCED RATE (VAT5)	19.77	415.33	British Gas du 05/08/20	Adm
		395.56		19.77	415.33		



Possibility to ignore the error messages and to customize the pop-up of some warnings in the Settings.

N.B : There are 3 types of messages:

- Information: Informative message which doesn't block the document Review.
- Warning: Message that block by default, but which can be ignored (when there are duplicates or problems between the type of document imported and the type of document detected for instance).
- Error: Message that block the document Review (unbalanced invoices, empty fields, etc).

1

2

3

Document \*

Entries [Yooz Standard C

Properties

Name \*

Payable invoice - no PO 280872308 (BRITISH GAS)

Organizational unit \*

Woking Office (WOK)

Vendors \*

BRITISH GAS

Payment method \*

Direct debit (PRE)

Document number \*

280872308

Document type \*

Payable invoice - no PO

AP / AR account \*

Standard Supplier (401000)

Document date \*

05/08/2020

Reception date \*

06/01/2021

Highlight Color

Cancel

OK

Invoice line(s)

Account *	Net amount (excl. tax) *	Tax code *	Tax amount *	Total amount (incl. tax) *	Line description	Department
+ ACCUMULATED DEPRECIATIO...	395.56	REDUCED RATE (VAT5)	19.77	415.33	British Gas du 05/08/20	Adm
	395.56		19.77	415.33		

Search

Domitille Van Dijk

1/18

Close

Submit

Forward...

Next

Block

Link with other documents...

Add comment

Export...

Customize form...

Confidentiality level ...

Highlight Color ...

Process before ...

Modify

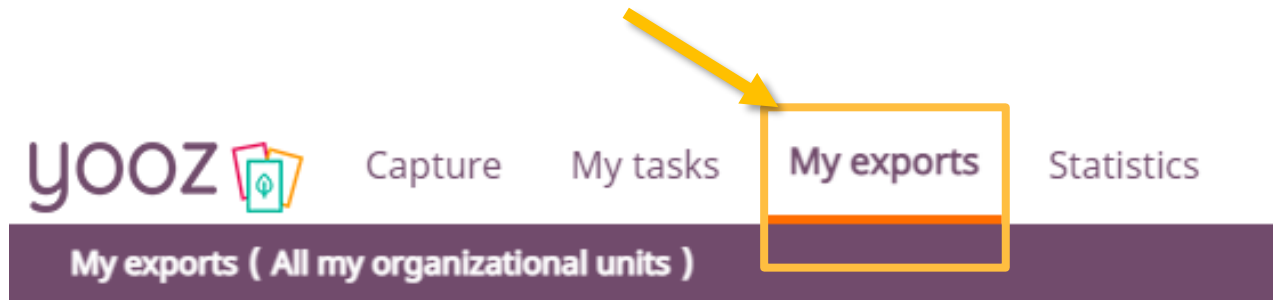
Show

Delete...

# Accounting Export

- Click on « My Exports » in the navigation bar:

Documents issued from the daily production:

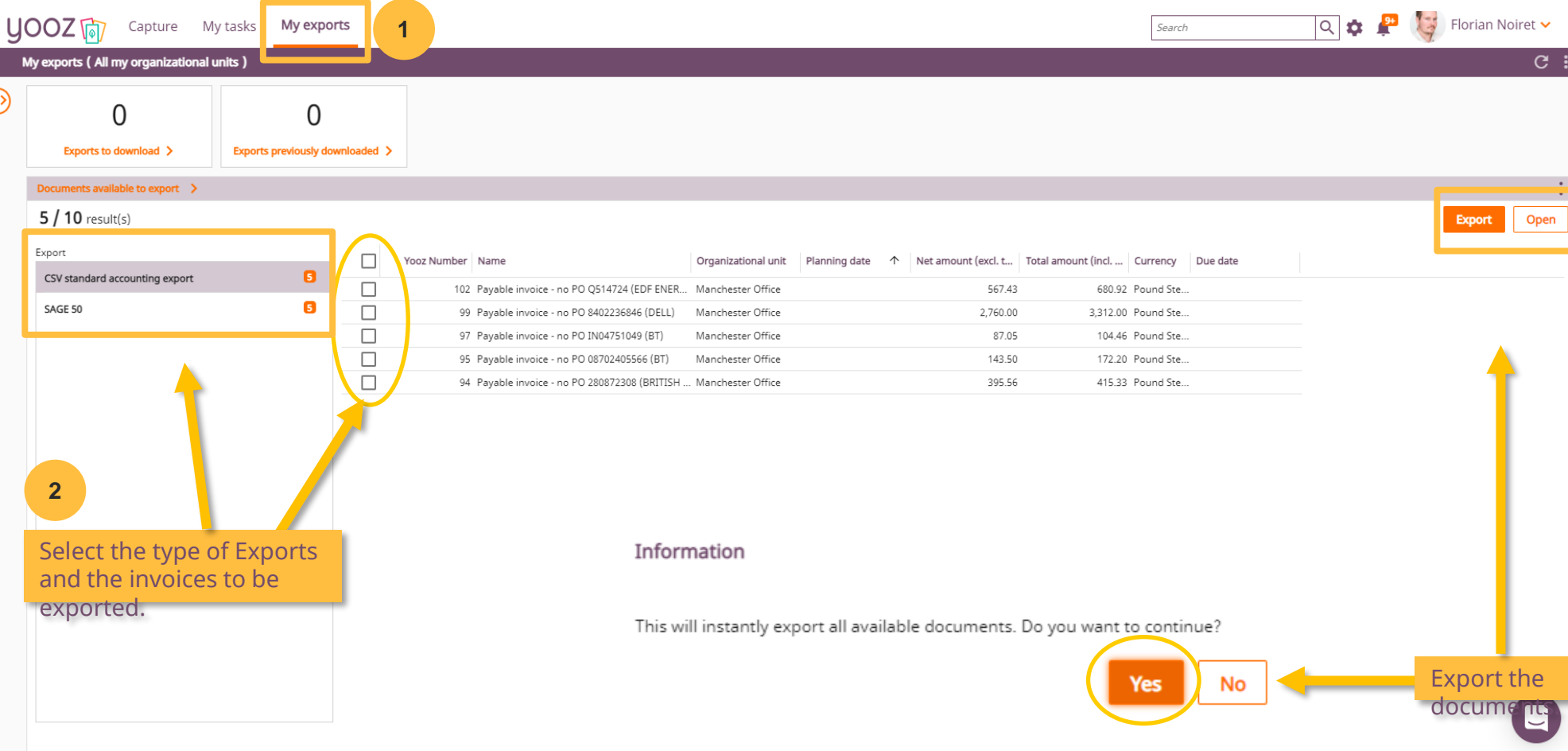


- Use the Search bar:

Documents already imported and requiring to be reexported:







## ■ Export documents from the Workspace « My Exports »



The screenshot shows the 'My exports' section of the Yooz application. It includes a navigation bar with 'My exports' highlighted, a search bar, and a user profile. Below the navigation bar, there are two boxes showing 'Exports to download' and 'Exports previously downloaded', both with a count of 0. The main area displays 'Documents available to export' with a list of 5 results. A callout '1' points to the 'My exports' tab. A callout '2' points to the 'Export' dropdown menu and the checkboxes for selecting documents. A callout '3' points to the 'Export' button and the confirmation dialog.

**1** My exports

Search      Florian Noiret

My exports ( All my organizational units )

0 Exports to download >

0 Exports previously downloaded >

Documents available to export >

5 / 10 result(s)

Export

- CSV standard accounting export 5
- SAGE 50 5

<input type="checkbox"/>	Yooz Number	Name	Organizational unit	Planning date	Net amount (excl. t...	Total amount (incl. ...	Currency	Due date
<input type="checkbox"/>	102	Payable invoice - no PO Q514724 (EDF ENER...	Manchester Office		567.43	680.92	Pound Ste...	
<input type="checkbox"/>	99	Payable invoice - no PO 8402236846 (DELL)	Manchester Office		2,760.00	3,312.00	Pound Ste...	
<input type="checkbox"/>	97	Payable invoice - no PO IN04751049 (BT)	Manchester Office		87.05	104.46	Pound Ste...	
<input type="checkbox"/>	95	Payable invoice - no PO 08702405566 (BT)	Manchester Office		143.50	172.20	Pound Ste...	
<input type="checkbox"/>	94	Payable invoice - no PO 280872308 (BRITISH ...	Manchester Office		395.56	415.33	Pound Ste...	

Export Open

**2** Select the type of Exports and the invoices to be exported.

**3** Export the documents


Information

This will instantly export all available documents. Do you want to continue?

Yes No

Check your Exports history.

Apply filters:  
Organizational unit or  
Document type.

yooz  Capture My tasks **My exports** Statistics

My exports ( All my organizational units )

1

Exports to download >

0

Exports previously downloaded >

Documents available to export >

Exports files ready to be downloaded.  
Click and select the folder you want to download.

Exports files already downloaded can be viewed here and downloaded again.

Exports à télécharger >

8 résultats

Date	↓	Nom	Export	Taille
07/10/2019 10:34:01		export_1999092439_CEGID_UNIVERSAL_157...	EXPORT TRA	9.69KB
07/10/2019 10:34:01		export_1000590083_CEGID_UNIVERSAL_157...	EXPORT TRA	4.55KB
07/10/2019 10:34:00		export_1000361280_CEGID_UNIVERSAL_157...	EXPORT TRA	4.55KB
07/10/2019 10:34:00		export_1999040505_CEGID_UNIVERSAL_157...	EXPORT TRA	4.55KB
07/10/2019 10:34:00		export_1000580894_CEGID_UNIVERSAL_157...	EXPORT TRA	12.93KB
07/10/2019 10:33:59		export_1999153853_CEGID_UNIVERSAL_157...	EXPORT TRA	4.55KB
07/10/2019 10:33:59		export_1000319496_CEGID_UNIVERSAL_157...	EXPORT TRA	121.85KB
05/10/2019 12:36:51		export_1000580894_CEGID_UNIVERSAL_157...	EXPORT TRA	4.55KB

Exports téléchargés >

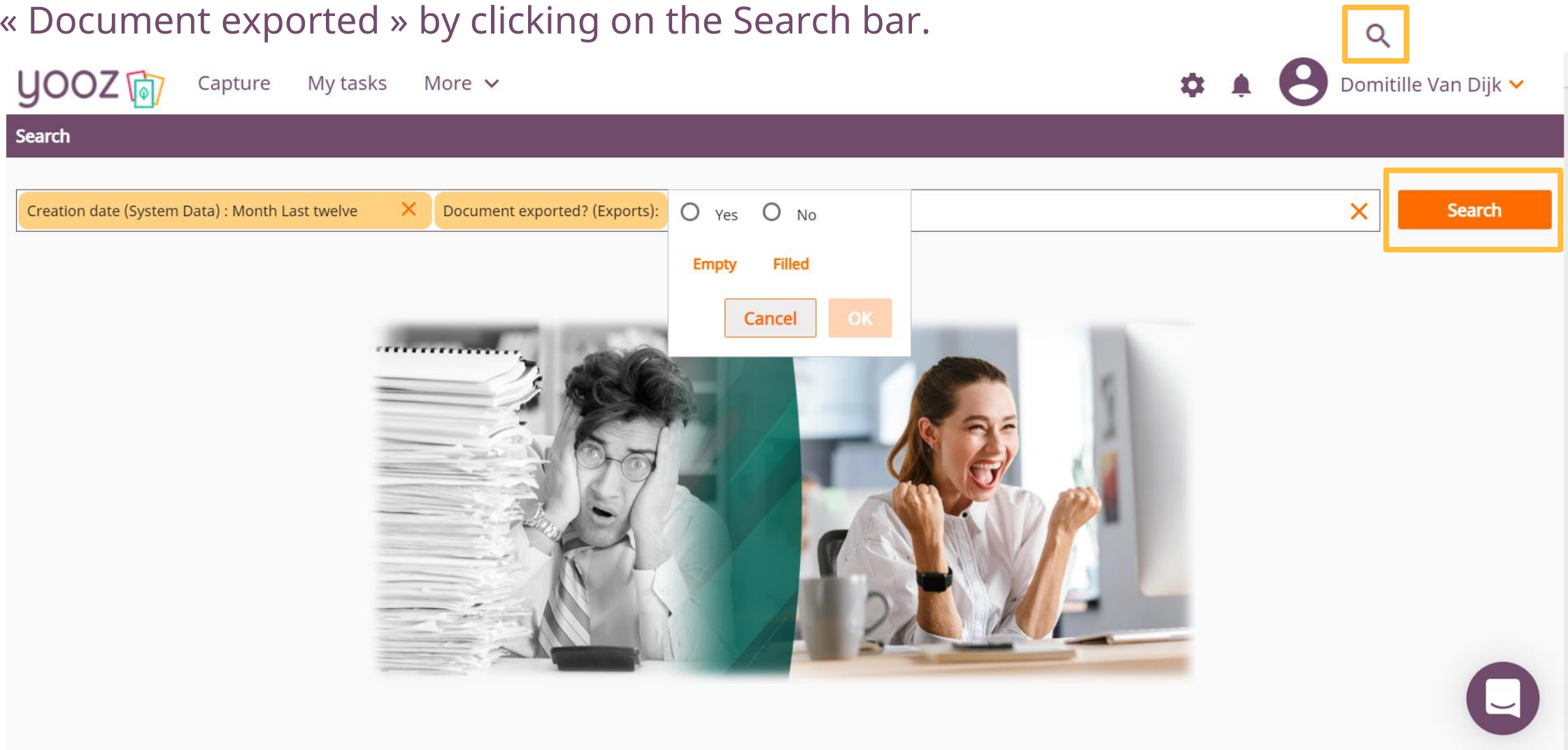
Pas de résultats

Date	↓	Nom	Export	Taille	Date de télécharge...	Téléchargé par
------	---	-----	--------	--------	-----------------------	----------------




# Search a document already exported

- To Export a document from the « Search » Workspace, add the Search criteria « Document exported » by clicking on the Search bar.



The screenshot displays the yooz application interface. At the top, the yooz logo and navigation links (Capture, My tasks, More) are visible. The user profile 'Domitille Van Dijk' is shown in the top right. The 'Search' workspace is active, with a search bar containing the criteria 'Creation date (System Data) : Month Last twelve' and 'Document exported? (Exports):'. A confirmation dialog is open, asking 'Document exported? (Exports):' with radio buttons for 'Yes' and 'No', and 'Empty' and 'Filled' options. The 'Search' button is highlighted with an orange border. Below the dialog, a man is shown looking overwhelmed by a large stack of papers, while a woman is shown celebrating with her arms raised.

yooz  Capture My tasks More ▾

Search



Creation date (System Data) : Month Last twelve ✕ Document exported? (Exports): ☐ Yes ☐ No

Empty Filled

Cancel OK

Search

# Export a document already exported (1/2)

yooz  Capture My tasks My exports Statistics ⚙️ 9+  Florian Noiret ▼

< Search ★ ⋮

Date de création (Donnée système) : Mois 12 derniers ✕ Document exporté ? (Exports) : Oui ✕

1 Select the document(s) to Export.

<input type="checkbox"/>	yooz Numb... ↓	Name	Alert	Document date	Total amount (incl. ...	Task	Potential roles	Potential users	Potential groups	Document creation ...	Due date	Organization	Export
<input type="checkbox"/>	102	Payable		10/01/2021	680.92	Payment approval (P...		Paying Agent		16/04/2021 23:25:10		Manchester Office	Payable invoice - no
<input type="checkbox"/>	90	Payable invoice - no PO 8402236846 (DELL)		25/11/2020	3,312.00	Payment approval (P...		Paying Agent		16/04/2021 23:25:08		Manchester Office	Payable invoice - no
<input type="checkbox"/>	97	Payable invoice - no PO IN04751049 (BT)		08/01/2021	104.46	Payment approval (P...		Paying Agent		16/04/2021 23:25:06		Manchester Office	Payable invoice - no
<input type="checkbox"/>	95	Payable invoice - no PO 08702405566 (BT)		08/01/2021	172.20	Payment approval (P...		Paying Agent		16/04/2021 23:25:02		Manchester Office	Payable invoice - no
<input type="checkbox"/>	94	Payable invoice - no PO 280872308 (BRITISH ...		29/11/2019	415.33	Payment approval (P...		Paying Agent		16/04/2021 23:25:01		Manchester Office	Payable invoice - no

2 Open Download Delete ⋮

3 Select the correct Export and click on Export.

Download search results

Choose a format \*

Detailed Excel with lines (all data)

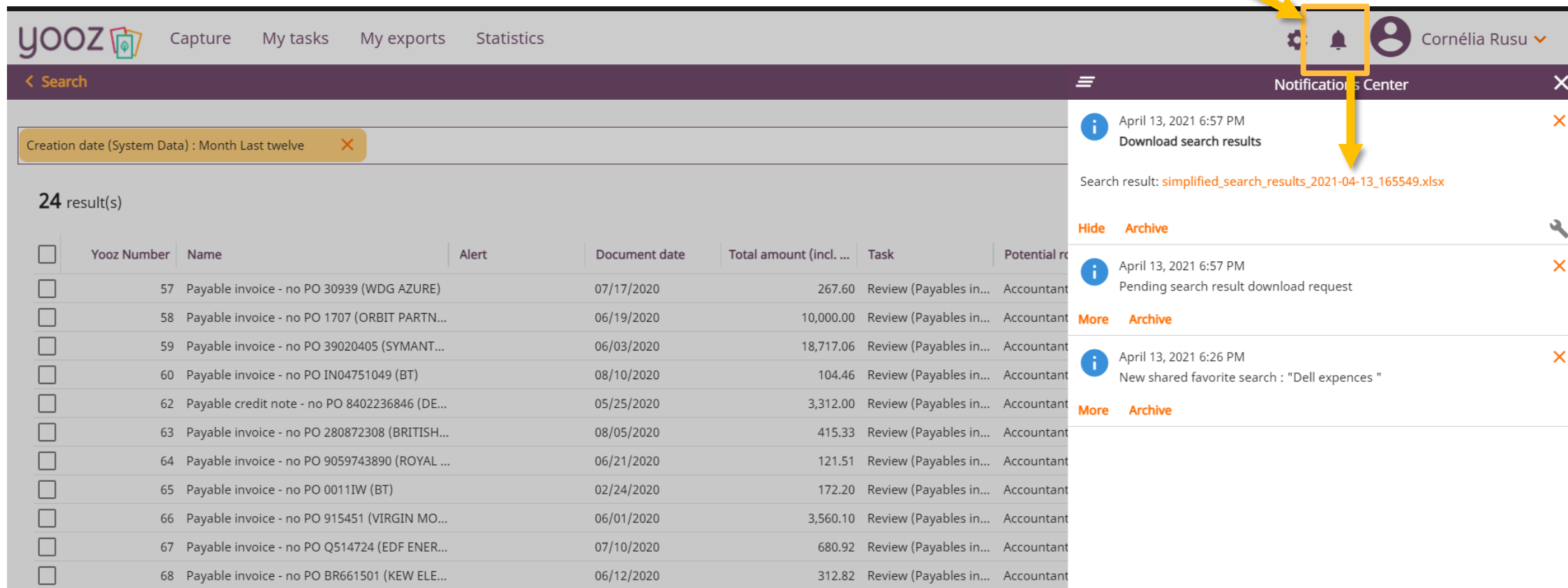
Simplified Excel (displayed data only)

Cancel Download

# Export a document already exported (2/2)

- Your file will be available directly in the Notification Center.

Access the  
Notification Center.



The screenshot shows the yooz application interface. At the top, there's a navigation bar with 'yooz' logo, 'Capture', 'My tasks', 'My exports', and 'Statistics'. On the right, there's a user profile 'Cornélia Rusu' and a bell icon for the Notification Center. Below the navigation bar, there's a search bar with a filter 'Creation date (System Data) : Month Last twelve'. The main area displays a table with 24 search results. An overlay for the Notification Center is open on the right, showing three notifications: 'Download search results', 'Pending search result download request', and 'New shared favorite search : "Dell expenses "'.

	Yooz Number	Name	Alert	Document date	Total amount (incl. ...)	Task	Potential r
<input type="checkbox"/>	57	Payable invoice - no PO 30939 (WDG AZURE)		07/17/2020	267.60	Review (Payables in...	Accountant
<input type="checkbox"/>	58	Payable invoice - no PO 1707 (ORBIT PARTN...		06/19/2020	10,000.00	Review (Payables in...	Accountant
<input type="checkbox"/>	59	Payable invoice - no PO 39020405 (SYMANT...		06/03/2020	18,717.06	Review (Payables in...	Accountant
<input type="checkbox"/>	60	Payable invoice - no PO IN04751049 (BT)		08/10/2020	104.46	Review (Payables in...	Accountant
<input type="checkbox"/>	62	Payable credit note - no PO 8402236846 (DE...		05/25/2020	3,312.00	Review (Payables in...	Accountant
<input type="checkbox"/>	63	Payable invoice - no PO 280872308 (BRITISH...		08/05/2020	415.33	Review (Payables in...	Accountant
<input type="checkbox"/>	64	Payable invoice - no PO 9059743890 (ROYAL ...		06/21/2020	121.51	Review (Payables in...	Accountant
<input type="checkbox"/>	65	Payable invoice - no PO 0011IW (BT)		02/24/2020	172.20	Review (Payables in...	Accountant
<input type="checkbox"/>	66	Payable invoice - no PO 915451 (VIRGIN MO...		06/01/2020	3,560.10	Review (Payables in...	Accountant
<input type="checkbox"/>	67	Payable invoice - no PO Q514724 (EDF ENER...		07/10/2020	680.92	Review (Payables in...	Accountant
<input type="checkbox"/>	68	Payable invoice - no PO BR661501 (KEW ELE...		06/12/2020	312.82	Review (Payables in...	Accountant

New feature: the Attachment Add-on

■ An important factor in the review and approval process is to be able to rely on additional elements to support your decision. With the Attachment Add-on, these elements can now be added as attachments.

- Attachments can be **added to a PR, to a PO, to an invoice...**
- Attachments can be **.PDF, Word, Excel, images, voice memos, videos...**
- An “attachment” is different from a “document” in Yooz. An “attachment” **cannot have its own review or validation process**. Only a “document” can follow a review & validation process in Yooz.

Interested ?

- Read these articles for more information:
- [Attachment add-on – Users](#)
- [Attachment add-on – Admins](#)
- If you wish to acquire the Attachment add-on, please reach out to Support

# Questions / Answers