

# Training Yooz Rising – Business Edition

## Module 8: Documents' Approval

# Objectives and duration of the training

## ■ Objective of the training

- Provide knowledge allowing mastery of Approval step in Yooz Rising.

## ■ Prerequisite

- None.

## ■ Targeted audience

- This training is for approvers, treasurers, payers.

## ■ Duration

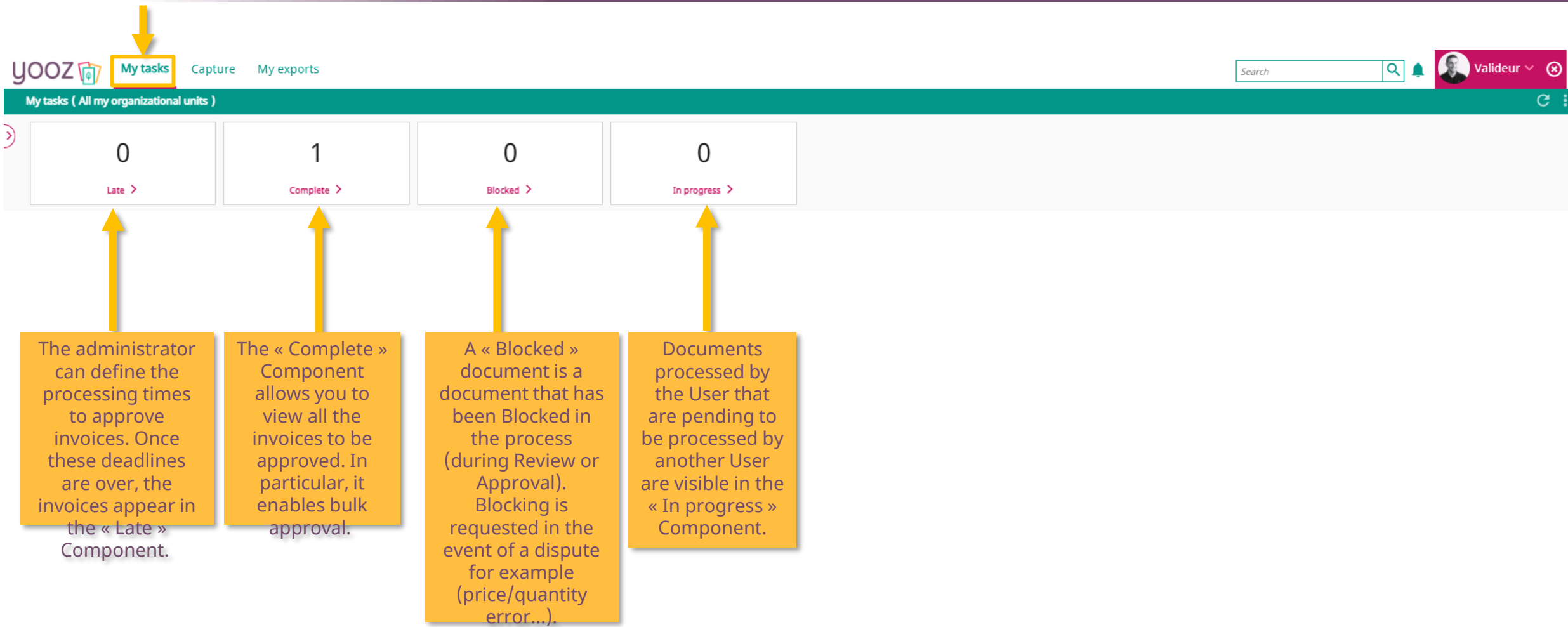
- 20 minutes.


## ■ Invoice Approval





- Simple Approval
- Exceptional cases



## ■ Dispute management

# Invoice Approval



 **My tasks** Capture My exports

Search    Valideur 

My tasks ( All my organizational units )  


0  
Late >



1  
Complete >

0  
Blocked >

0  
In progress >

To do >

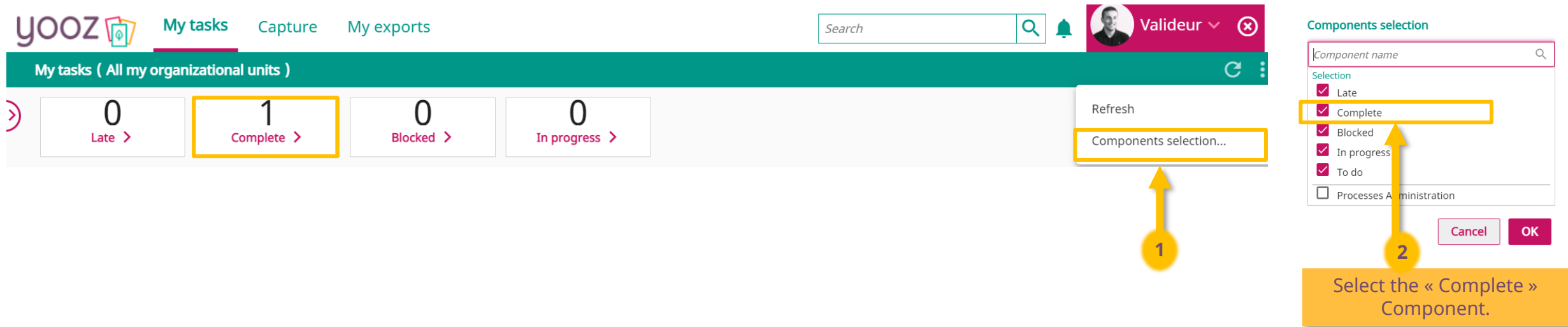
1 result(s) 

Organizational unit	<input type="checkbox"/> Rank ↑	Name	Completion rate	Task	Alert	Third party (vendor...	Document date	Net amount (excl. t...	Total amount (incl. ...	Currency	Document creation...
Filiale Montpellier 	<input type="checkbox"/>	1 Payable invoice - no PO 9998 (DELL)		Approval		DELL (FDELL)	21/07/2020	1,300.00	1,560.00	Euro	16/12/2020 14:33:48

Click on the document to be approved.

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- The « Complete » Component is used to approve documents in bulk. Instead of approving them one by one, it will be possible to approve them in a single operation. To view them:







The screenshot displays the yooz application interface. At the top, there's a navigation bar with 'My tasks', 'Capture', and 'My exports'. Below this, a teal header reads 'My tasks ( All my organizational units )'. A row of four buttons shows task counts: 'Late' (0), 'Complete' (1), 'Blocked' (0), and 'In progress' (0). The 'Complete' button is highlighted with a yellow box. A dropdown menu is open from the 'Complete' button, showing 'Refresh' and 'Components selection...'. A yellow arrow labeled '1' points to the 'Components selection...' option. To the right, a 'Components selection' dialog is open, showing a list of components with checkboxes: 'Late', 'Complete', 'Blocked', 'In progress', 'To do', and 'Processes Administration'. The 'Complete' component is selected and highlighted with a yellow box. A yellow arrow labeled '2' points to this selection. Below the dialog, a yellow box contains the text 'Select the « Complete » Component.'.



Click on the  
« Complete » Component.

yooz  Capture **My tasks** My exports Statistics

Search     Domitille Van Dijk ▾

< My tasks Complete ▾ ( All my organizational units )

18 result(s) , 2 selections

Process > Task


Payables invoice/credit process Review 18




Select the documents to be approved in bulk while ensuring to position your cursor on the documents awaiting for Approval. **1**

Click on « Open » to preview the documents or directly on « Process automatically » **2**

Rank	Name	Alert	Organizational unit	Third party (vendor...)	Document date	Net amount (excl. t...	Total amount (incl. ...	Currency	Document creation...
1	Payable invoice - no PO 280872308 (BRITISH...		Woking Office	BRITISH GAS	09/08/2018	395.56	415.33	Pound St...	06/01/2021 11:27:24
2	Payable invoice - no PO 00111W (BT)		Woking Office	BT	24/02/2020	143.50	172.20	Pound St...	06/01/2021 11:30:09
3	Payable invoice - no PO IN04751049 (BT)		Woking Office	BT	10/08/2020	87.05	104.46	Pound St...	06/01/2021 11:23:16

Process automatically Open Delete

yooz  **My tasks** Capture My exports

Search    Valideur ▾

< My tasks Complete ▾ ( All my organizational units )

1 result(s)

Process > Task

Payables invoice/credit process Approval 1

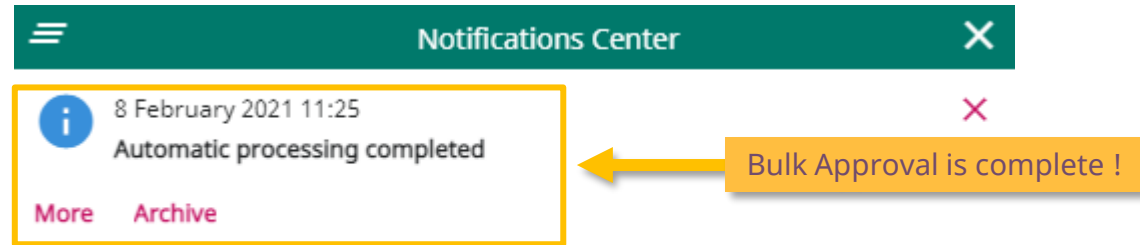
The request for Automatic processing dialog box informs that Automatic processing (in bulk) has been requested by the User. The Alert is therefore displayed on the « Process requested » line, which means that the processing of these documents has been requested. **3**

Automatic processing request ×

More


Rank	Name	Alert	Organizational unit	Third party (vendor...)	Document date	Net amount (excl. t...	Total amount (incl. ...	Currency	Document creation...
1	Payable invoice - no PO 9998 (DELL)	Process requested	Filiale Montpellier	DELL (FDELL)	21/07/2020	1,300.00	1,560.00	Euro	16/12/2020 14:33:48





Process automatically Open




# Dispute management

# Dispute management and invoice blocking (1/4)

 **My tasks** Capture My exports

Search    Valideur 

My tasks ( All my organizational units ) 


0  
Late >



1  
Complete >

0  
Blocked >

0  
In progress >

To do >


1 result(s) 





Organizational unit	<input type="checkbox"/> Rank ↑	Name	Completion rate	Task	Alert	Third party (vendor...	Document date	Net amount (excl. t...	Total amount (incl. ...	Currency	Document creation...
Filiale Montpellier 	<input type="checkbox"/>	1 Payable invoice - no PO 9998 (DELL)		Approval		DELL (FDELL)	21/07/2020	1,300.00	1,560.00	Euro	16/12/2020 14:33:48






Click on the document to be approved.

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# Dispute management and invoice blocking (3/4)


Mes tâches
Capture
Mes exports




Valideur


< A faire
Validation Facture / Avoir d'achat, 1ère étape de Validation (N° Yooz 44)
En retard
1/1






Document \*
Ecriture [Yooz Standard CSV]

Fermer
Valider
Renvoyer...
Transférer...

Blocked

Blocked reason \*

Blocked description

Properties

Name \*

Facture d'achat 9

Document type \*

Payable invoice

Payment method \*

Direct debit (PRE)

Reception date \*

Organizational unit \*

Filiale Montpellier (FMTP)

AP / AR account \*

Collectif Fournisseurs (4010000)

Document number \*

9998

Net amount (excl. tax) \*

Once you have clicked on « Block », it is possible to enter a « Blocked reason » and even a comment in the « Blocked description » section

INVOICE

PHARMACIE ONLINE

INVOICE n°290120201

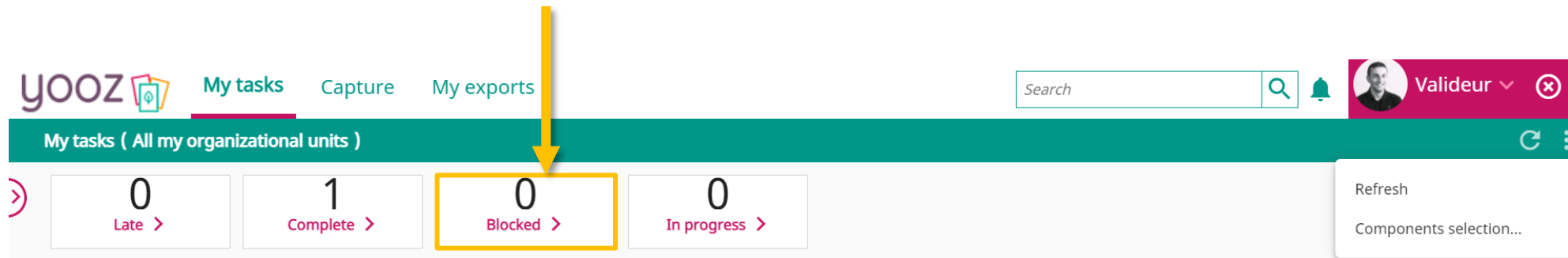
Date : 21/07/2020

Item number	Item designation	Quantity	Unit price	Total amount	Tax code
12	COMPUTER	1	1300,00	1560,00	1

Invoice lines

Account	Net amount (excl. tax) *	Tax code	Tax amount *	Total amount (incl. tax) *	Line description
Petit équipement informatiq...	1,300.00	TVA déductible à 20% (T20)	260.00	1,560.00	FDELL du 21/07/20
	1,300.00		260.00	1,560.00	

Once the document is Blocked, it will be found in the « Blocked » Component.



The screenshot shows the yooz interface with the 'My tasks' tab selected. The header includes the yooz logo, navigation links for 'My tasks', 'Capture', and 'My exports', a search bar, a notification bell, and a user profile for 'Valideur'. Below the header, a teal bar indicates 'My tasks ( All my organizational units )'. The main content area displays four task status components: 'Late' with 0 items, 'Complete' with 1 item, 'Blocked' with 0 items (highlighted with a yellow box and an arrow from the text box above), and 'In progress' with 0 items. A right-click menu is visible over the 'Blocked' component, showing options for 'Refresh' and 'Components selection...'.

- Once the dispute is over, it can be released by clicking on the  button again.



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.

'/>

Click on “+” or on the 3 dots to open the attachment selection window

To import files, click on “Select a file” or drag & drop

1

2

Close Import

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