Cloud P2P Automation. Easy. Powerful. Smart.

Training Yooz Rising – Business Edition

Module 8: Documents' Approval

© Yooz 2022 - Confidential

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.

© Yooz 2022 - Confidential

Training plan

- Invoice Approval
  - Simple Approval
  - Exceptional cases
- Dispute management

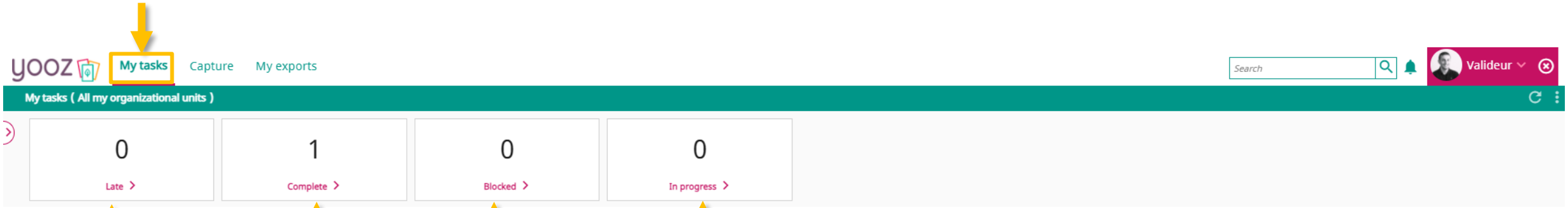
© Yooz 2022 - Confidential

yooz

Cloud P2P Automation. Easy. Powerful. Smart.

Invoice Approval

Invoice Approval (1/3)



The administrator can define the processing times to approve invoices. Once these deadlines are over, the invoices appear in the « Late » Component.

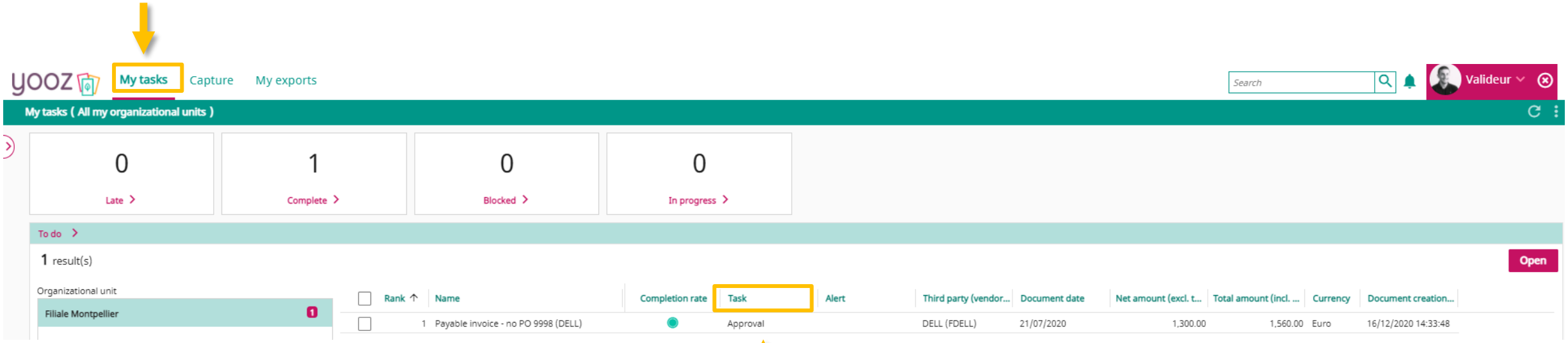
The « Complete » Component allows you to view all the invoices to be approved. In particular, it enables bulk approval.

A « Blocked » document is a document that has been Blocked in the process (during Review or Approval). Blocking is requested in the event of a dispute for example (price/quantity error...).

Documents processed by the User that are pending to be processed by another User are visible in the « In progress » Component.

© Yooz 2022 - Confidential

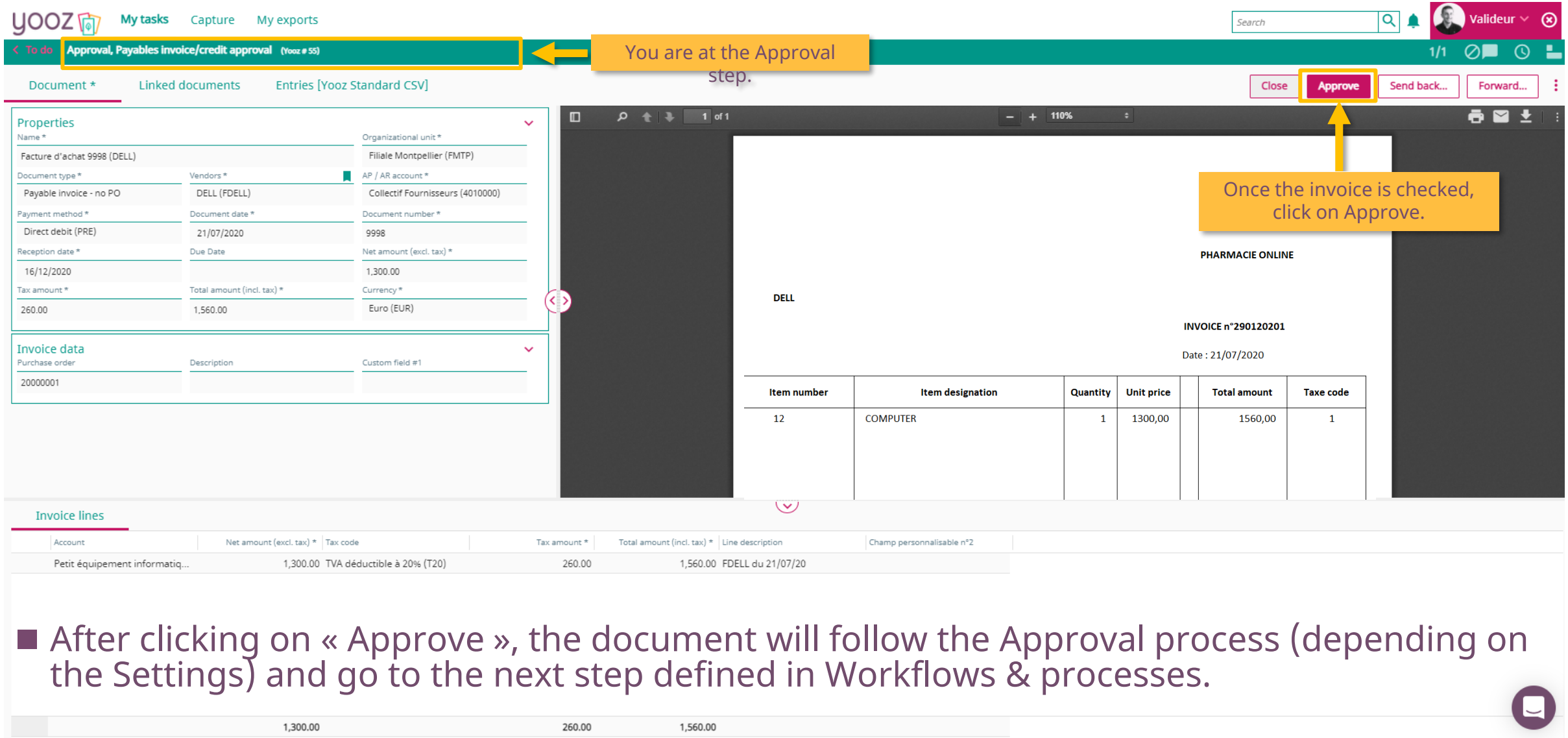
Invoice Approval (2/3)



Click on the document to be approved.

© Yooz 2022 - Confidential

Invoice Approval (3/3)

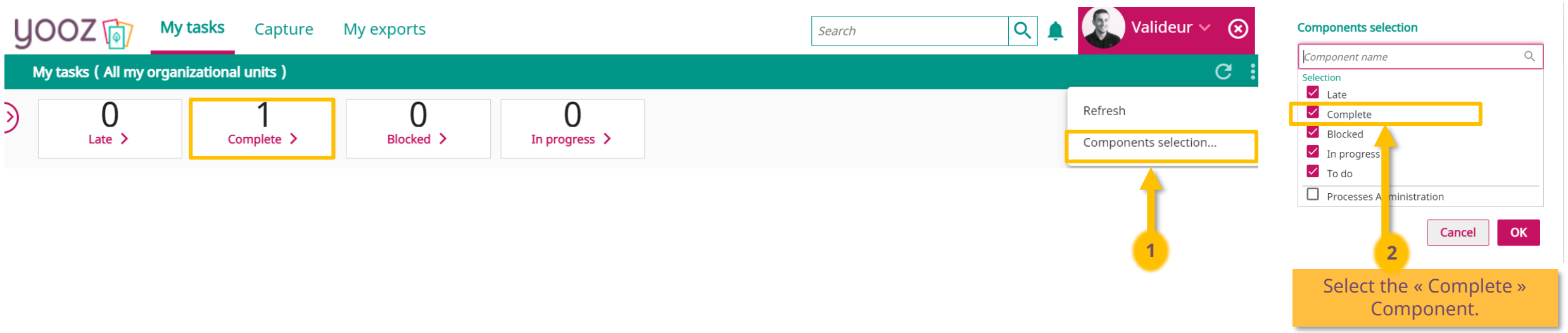


- After clicking on « Approve », the document will follow the Approval process (depending on the Settings) and go to the next step defined in Workflows & processes.

© Yooz 2022 - Confidential

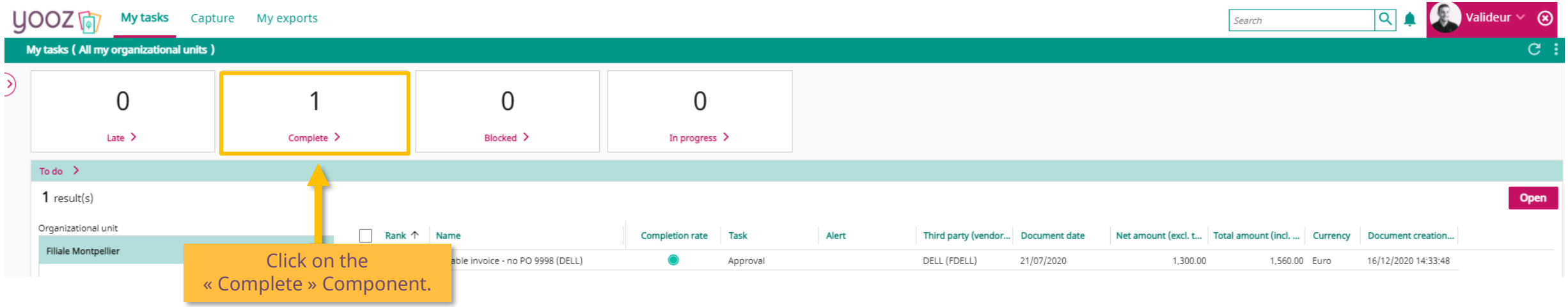
Bulk Approval (1/4)

- 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:



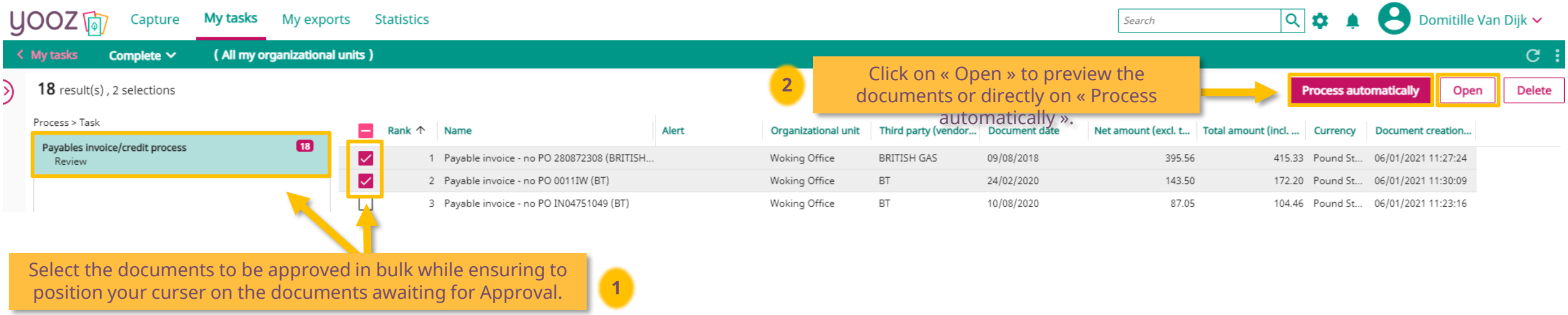
© Yooz 2022 - Confidential

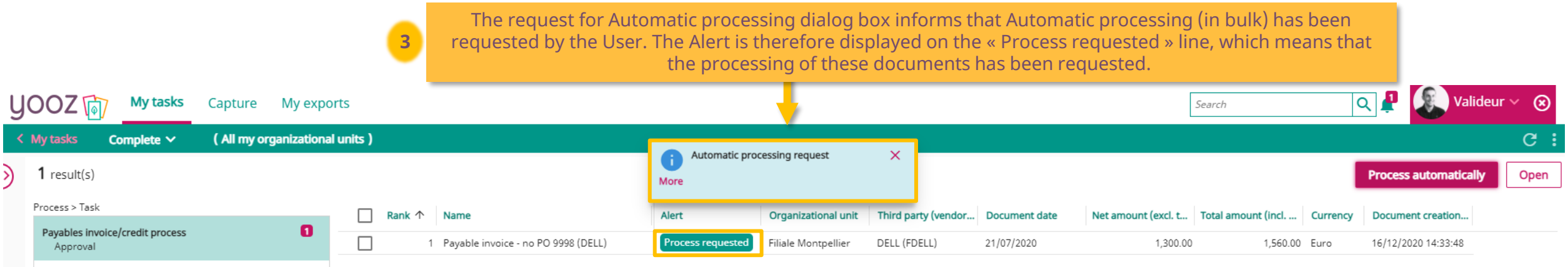
Bulk Approval (2/4)



© Yooz 2022 - Confidential

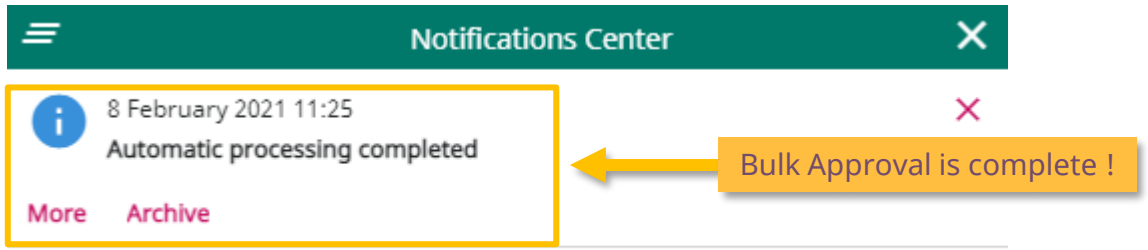
Bulk Approval (3/4)





© Yooz 2022 - Confidential

Bulk Approval (4/4)



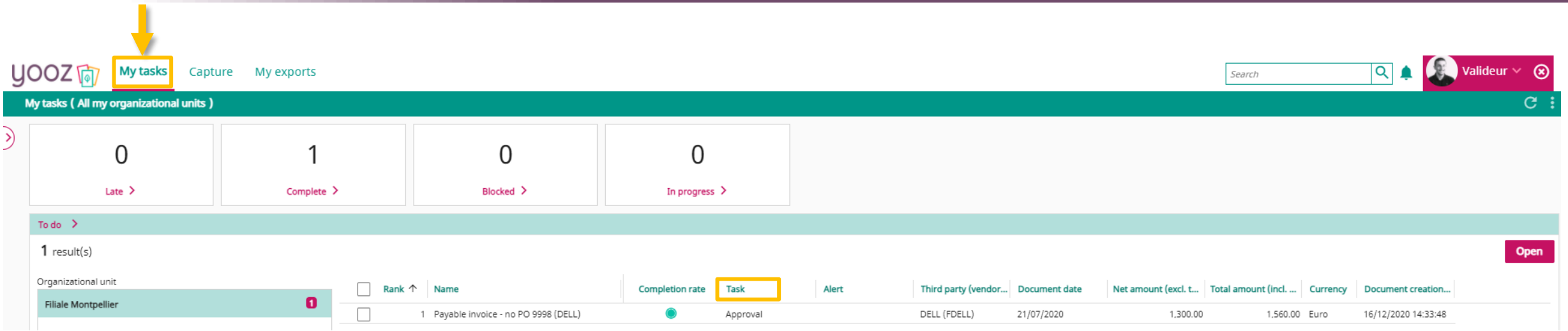
© Yooz 2022 - Confidential

yooz

Cloud P2P Automation. Easy. Powerful. Smart.

Dispute management

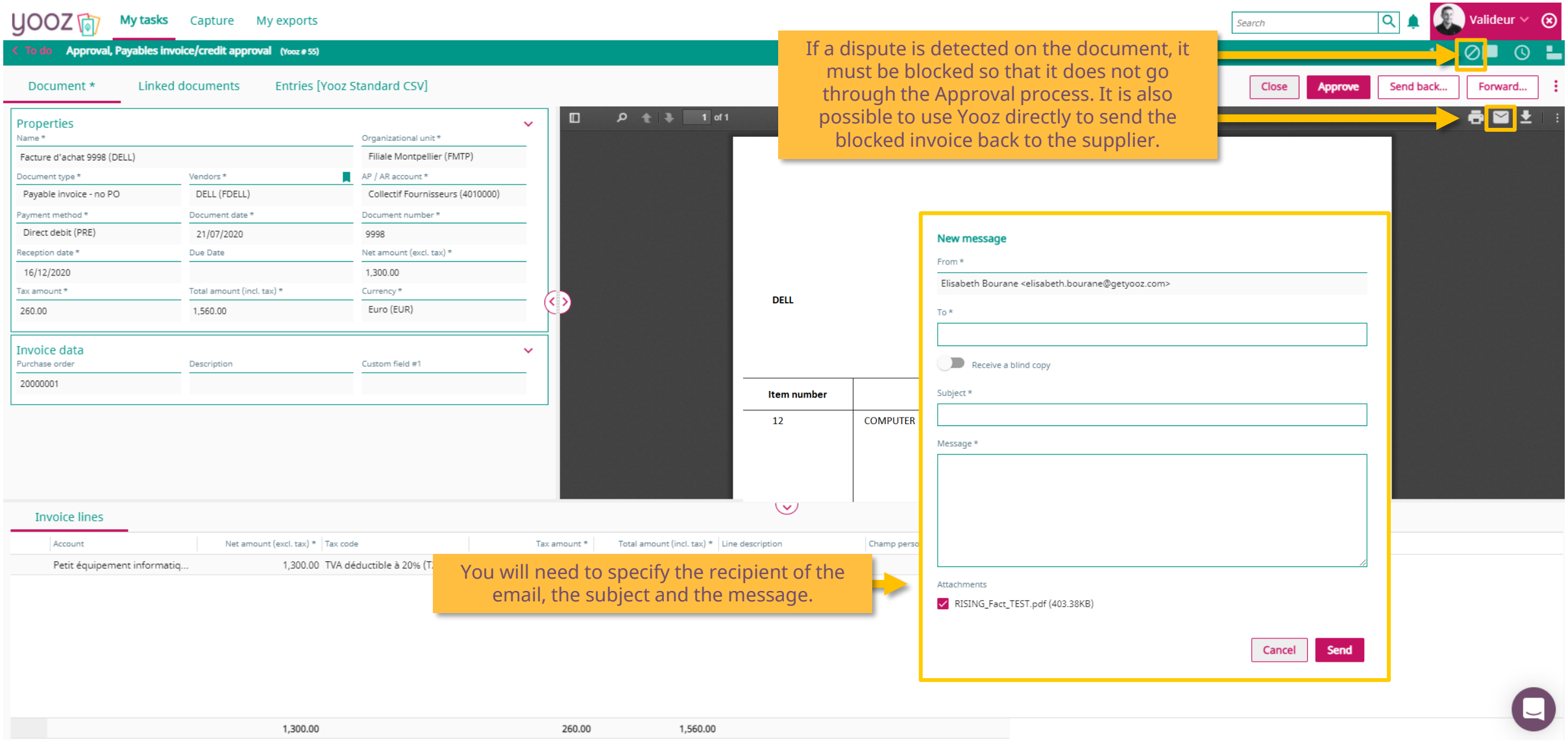
Dispute management and invoice blocking (1/4)



Click on the document to be approved.

© Yooz 2022 - Confidential

Dispute management and invoice blocking (2/4)

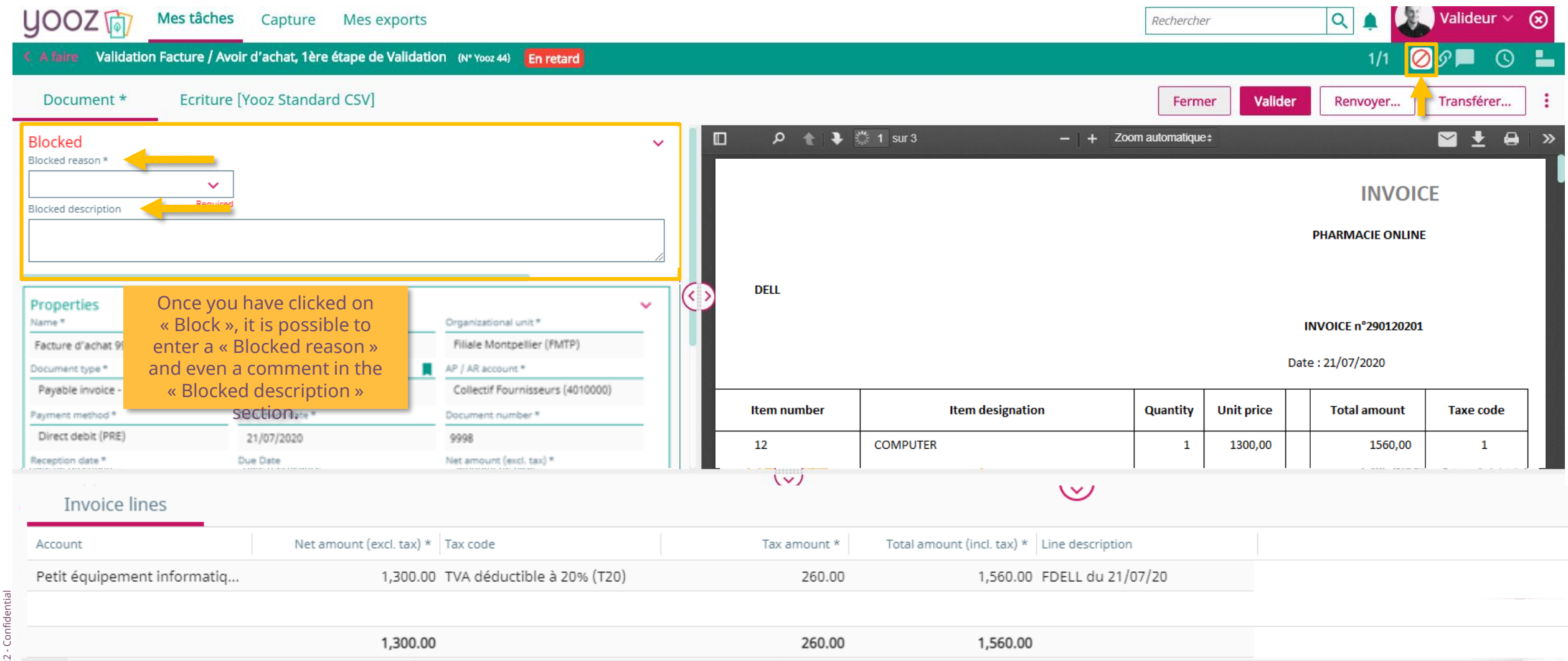


If a dispute is detected on the document, it must be blocked so that it does not go through the Approval process. It is also possible to use Yooz directly to send the blocked invoice back to the supplier.

You will need to specify the recipient of the email, the subject and the message.

© Yooz 2022 - Confidential

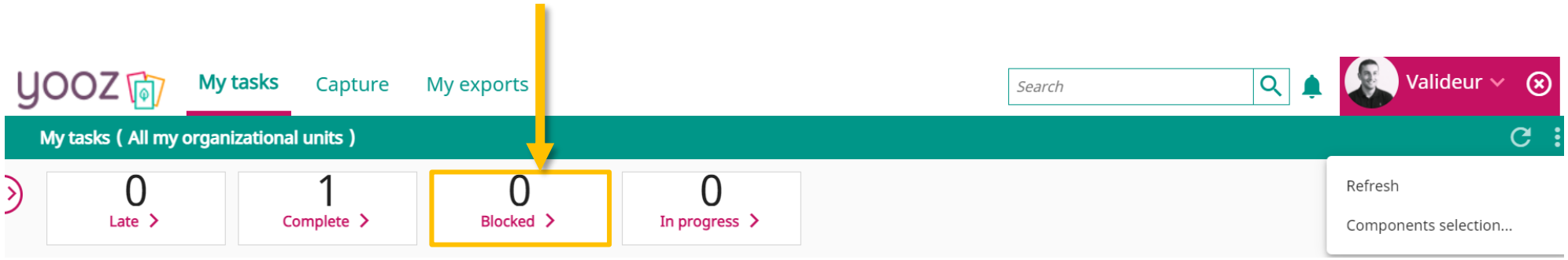
Dispute management and invoice blocking (3/4)



© Yooz 2022 - Confidential

Dispute management and invoice blocking (4/4)

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



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

© Yooz 2022 - Confidential

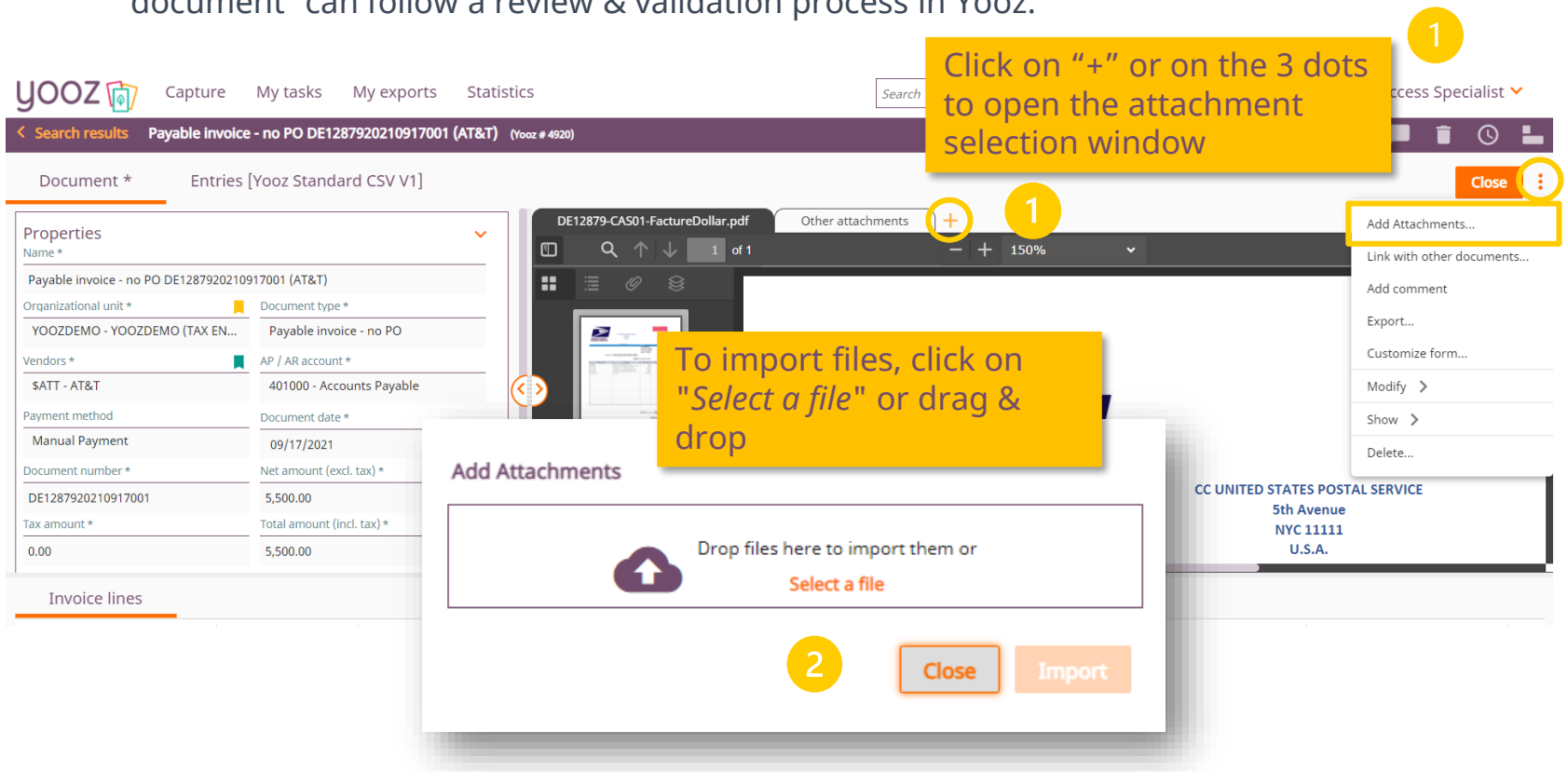
yooz

Cloud P2P Automation. Easy. Powerful. Smart.

New feature: the Attachment Add-on

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

© Yooz 2022 - Confidential

yooz

Cloud P2P Automation. Easy. Powerful. Smart.

Questions / Answers