Yooz Rising training – Business Edition

Module 9:
Document Search and Export

- **Objective of the training**

  - Provide the knowledge to master the Search functionality.

- **Prerequisites**

  - None.

- **Targeted audience**

  - This training is for all the users of the platform.

- **Duration**

  - 30 minutes.

■ Search

- ■ Simple Search
- ■ Combined Search (multi-criteria and fulltext)
- ■ Search criteria

■ Favorite Search (dynamic folders)

Search

![yooz logo](Cloud P2P Automation. Easy. Powerful. Smart.)

Capture   My tasks   My exports   Statistics

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Capture (All my organizational units)

File upload >

Organizational unit *
(?)

Document type *
(?)

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 >

No results

☐ Capture date ↓ Filename   Suggested Docum... Organizational unit

To access the dedicated Search page, select the magnifying glass.

Imported files >

79 result(s)

Capt... ↓	Capture date	Filename	Number of docum...	Organizational unit	Document type	Capture source	Capture channel	Imported by	Alert	Split
79	02/26/2021 12:29:29...	INVOICE PO21-000001 COMCEN.pdf	1	London Office	Payable invoice - PO...	Manual import		Florian Noiret		No
78	01/14/2021 10:10:41...	Ms Sylvie Laspalles-Blanc Invoice 23 2 16 (00...	1	Woking Office	Payable invoice - no ...	Manual import		Florian Noiret		No
77	01/06/2021 11:41:17...	Tautliners UK Limited - Invoice No. 19400.pdf	1	London Office	Payable invoice - no ...	Manual import		Florian Noiret		No
76	01/06/2021 11:41:17...	Invoice-213900.PDF	1	London Office	Payable invoice - no ...	Manual import		Florian Noiret		No

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Search

Creation date (System Data) : Month Last twelve ✕ ✕ **Search**

Recently used

Document date
Document type
Organizational unit
Third party (vendor, customer...)
Yooz number

Other suggestions

AP / AR account
Account (Invoice lines)
Account (Purchase line(s))
Accounting date
Accrued invoices ? (Other purchase data)

Click in the area to make the Search criteria appear.

Select and set up the Search criteria.

Document date:

| Values | Between...and... | Contextual date range |

Equal to ⌄

MM/DD/YYYY 📅

Empty   Filled

Cancel   OK

Accounting date
Accrued Invoices ? (Other purchase data)

| Values | Between...and... | Contextual date range |

Day ⌄   Current ⌃

Previous

Current

Next

Possibility to select several criteria.

Possibility of combining keywords search and multicriteria search.

Run the Search once the criteria have been specified.

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‹ Search

Creation date (System Data) : Month Last twelve ✕   Document type : Payable invoice - no PO ✕

> Click on the arrow of a document to display its "details".

20 result(s)

	Yooz Numb... ↓	Name	Alert	Document date	Total amount (incl. ...	Task	Potential roles	Potential users	Potential groups	Documen reation...
☐	78	Payable invoice - no PO INV02852 (FARNHA...		06/10/2020	69.00	Review (Payables in...	Accountant, Extend...			01/14/2021 0:1...
☐	77	Payable invoice - no PO 1103421 (AUTOSMA...		04/28/2020	544.99	Review (Payables in...	Accountant, Extend...			
☐	76	Payable invoice - no PO 213900 (OFFICLEAN)		12/07/2020	683.86	Review (Payables in...	Accountant, Extend...			01/06/2021 11:41:22...
										01/06/2021 11:41:22...

Show details panel

> Preview of the document's image.

	Yooz Numb... ↓		Document date	Total amount (incl. ...	Task			
☐	**78**		06/1...		y (Payables...			
☐	77	Payable invoice - no PO 103421 (AUTOSMA...	04/2...		y (Payables...			
☐	76	Payable invoice - no PO 13900 (OFFICLEAN)	12/07/2020	683.86	Review (Payables...			
☐	75	Payable invoice - no PO 357034 (HGV DIRE...	12/09/2020	45.35	Review (Payables...			
☐	74	Payable invoice - no PO 9400 (TAUTLINERS ...	12/03/2020	120.00	Review (Payables...			
☐	73	Payable invoice - no PO 677127 (ABS BUR...	12/09/2020	22.10	Review (Payables...			
☐	72	Payable invoice - no PO 000826127	06/01/2020	186.37	Review (Payables...			

> Document's Properties and allocation lines.

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
LEROY ADVISORY   Booking :   BK2363/1/1/1
Block C   Arrival :   10/Jun/2020
Dukes Court   Departure :   11/Jun/2020
Woking
GU21 5BH

Errors	**Properties**	Invoice data	Invoice lines

Name *		Organizational unit *	Document type *	Vendors *
Payable invoice - no PO INV02852 (FARNHAM HOUSE HOTEL)		Woking Office (WOK)	Payable invoice - no PO	FARNHAM HOUSE HOTEL

AP / AR account *	Payment method *	Document date *	Document number *	Reception date *
Standard Supplier (401000)	Direct debit (PRE)	06/10/2020	INV02852	01/14/2021

Actions available in Search

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< Search   Dell expences

Actions on the found documents.

Third party (vendor, customer...) : DELL   ✕   Document date : Year Previous   ✕   Search

20 result(s)

Select the documents on which you want to perform your action.
If there is no selection, the action will be applied on all the documents found.

Open   Download   Delete   ⋮

	Yooz Numb		Document date	Total amount (incl. ...	Task	Potential roles	Potential users	Potential groups	Document cre... ↑	
☐	57	Payable invoice - no PO 30939 (WDG AZURE)	07/17/2020	267.60	Review (Payables in...	Accountant, Extend...			01/06/2021 11:22:53...	
☐	58	Payable invoice - no PO 1707 (ORBIT PARTN...	06/19/2020	10,000.00	Review (Payables in...	Accountant, Extend...			01/06/2021 11:22:59...	
☐	59	Payable invoice - no PO 39020405 (SYMANT...	06/03/2020	18,717.06	Review (Payables in...	Accountant, Extend...			01/06/2021 11:23:07...	
☐	60	Payable invoice - no PO IN04751049 (BT)	08/10/2020	104.46	Review (Payables in...	Accountant, Extend...			01/06/2021 11:23:16...	
☐	63	Payable invoice - no PO 280872308 (BRITISH...	08/05/2020	415.33	Review (Payables in...	Accountant, Extend...			01/06/2021 11:27:24...	
☐	64	Payable invoice - no PO 9059743890 (ROYAL ...	06/21/2020	121.51	Review (Payables in...	Accountant, Extend...			01/06/2021 11:29:46...	
☐	65	Payable invoice - no PO 0011IW (BT)	02/24/2020	172.20	Review (Payables in...	Accountant, Extend...			01/06/2021 11:30:09...	
☐	66	Payable invoice - no PO 915451 (VIRGIN MO...	06/01/2020	3,560.10	Review (Payables in...	Accountant, Extend...			01/06/2021 11:30:24...	
☐	67	Payable invoice - no PO Q514724 (EDF ENER...	07/10/2020	680.92	Review (Payables in...	Accountant, Extend...			01/06/2021 11:30:38...	
☐	68	Payable invoice - no PO BR661501 (KEW ELE...	06/12/2020	312.82	Review (Payables in...	Accountant, Extend...			01/06/2021 11:39:21...	
☐	69	Payable invoice - no PO URI125268	06/01/2020	436.80	Review (Payables in...	Accountant, Extend...			01/06/2021 11:39:25...	
☐	70	Payable invoice - no PO TE085902 (BEW)	12/09/2020	100.63	Review (Payables in...	Accountant, Extend...			01/06/2021 11:39:28...	
☐	71	Payable invoice - no PO 9649755 (INFOCUS I...	06/10/2020	5,989.40	Review (Payables in...	Accountant, Extend...			01/06/2021 11:39:30...	

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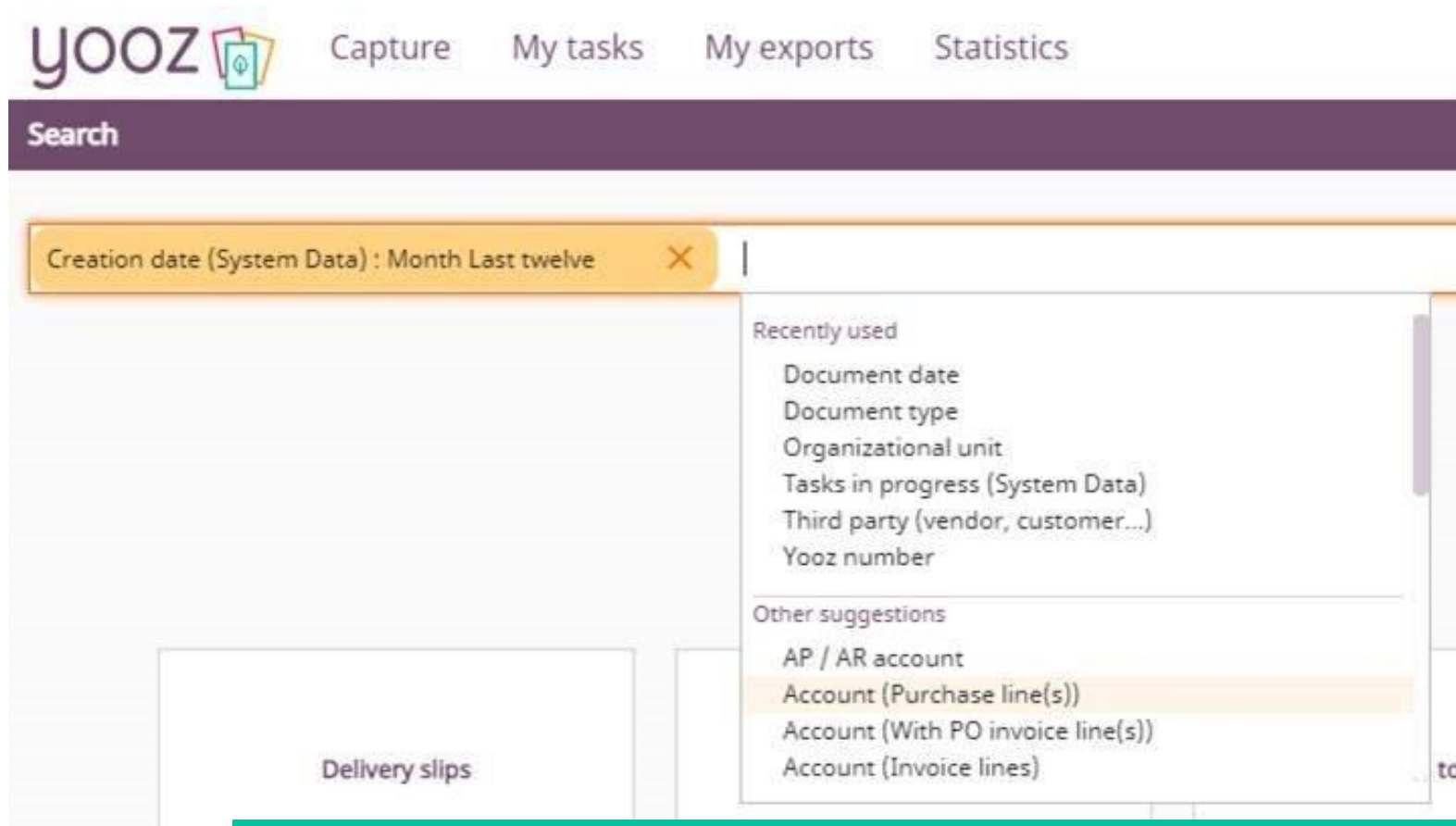
■ To consult the full list of Search criteria, click once in your Search bar: the full list is displayed.

The most frequently used criteria are displayed at the top of the list. The name of each criterion corresponds to the name of the field where the data is displayed, followed by the section on the Yooz interface where this criterion is displayed.

Example: the 'Document date' criterion is one of the frequently used criteria, the 'Account (Purchase line(s))' criterion corresponds to the account entered in the 'Purchase Line(s)' section in Yooz.

Learn more about how to find the full list of Search criteria in Yooz? Click this button

Favorite Search

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‹ Search

Third party (vendor, customer...) : DELL ✕   Document date : Year Previous ✕   ☆ ✕   **Search**

1 Save the Search and add it to favorites.

20 result(s)   Open   **Download**   **Delete**   ⋮

Add this search to the favorites

☐ Yooz Number   Alert

2 Give your Search a name.

Name
Dell expences   ✕

57 Payable invoice - no PO 30939 (WDG AZURE)   Extend...   01/06/2021 11:22:53...

3 Share it with other Users.

☑ 👥 Shared with other users   Extend...   01/06/2021 11:22:59...

59 Payable invoice - no PO 39020405 (SYMANT...   Extend...   01/06/2021 11:23:07...

60 Payable invoice - no PO IN04751049 (BT)   Extend...   01/06/2021 11:23:16...

63 Payable invoice - no PO 280872308 (BRITISH...   Users...   Extend...   01/06/2021 11:27:24...

4 Select from different Users, Groups or Roles.

Groups...   Extend...   01/06/2021 11:29:46...

65   Roles...   Extend...   01/06/2021 11:30:09...

66 Payable invoice - no PO 915451 (VIRGIN MO...   Extend...   01/06/2021 11:30:24...

67 Payable invoice - no PO Q514724 (EDF ENER...   **Cancel**   **OK**   Extend...   01/06/2021 11:30:38...

68 Payable invoice - no PO BR661501 (KEW ELE...   06/12/2020   312.82 Review (Payables in... Accountant, Extend...   01/06/2021 11:39:21...

69 Payable invoice - no PO URI125268   06/01/2020   436.80 Review (Payables in... Accountant, Extend...   01/06/2021 11:39:25...

70 Payable invoice - no PO TE085902 (BEW)   12/09/2020   100.63 Review (Payables in... Accountant, Extend...   01/06/2021 11:39:28...

71 Payable invoice - no PO 9649755 (INFOCUS I... 06/10/2020 5,989.40 Review (Payables in... Accountant, Extend...   01/06/2021 11:39:30...

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Capture   My tasks   My exports   Statistics

Consult your favorite Searches.

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< Search   Dell expences   ★

| Third party (vendor, customer...) : DELL ✕ | Document date : Year Previous ✕ | ★ ✕ | **Search** |

20 result(s)   Open   Download   Delete   ⋮

☐	Yooz Number	Name	Alert	Document date	Total amount (incl. ...	Task	Potential roles	Potential users	Potential groups	Document cre... ↑
☐	57	Payable invoice - no PO 30939 (WDG AZURE)		07/17/2020	267.60	Review (Payables in...	Accountant, Extend...			01/06/2021 11:22:53...
☐	58	Payable invoice - no PO 1707 (ORBIT PARTN...		06/19/2020	10,000.00	Review (Payables in...	Accountant, Extend...			01/06/2021 11:22:59...
☐	59	Payable invoice - no PO 39020405 (SYMANT...		06/03/2020	18...					01/06/2021 11:23:07...
☐	60	Payable invoice - no PO IN04751049 (BT)		08/10/2020						01/06/2021 11:23:16...
☐	63	Payable invoice - no PO 280872308 (BRITISH...		08/05/2020						01/06/2021 11:27:24...
☐	64	Payable invoice - no PO 9059743890 (ROYAL ...		06/21/2020						01/06/2021 11:29:46...
☐	65	Payable invoice - no PO 0011IW (BT)		02/24/2020						01/06/2021 11:30:09...
☐	66	Payable invoice - no PO 915451 (VIRGIN MO...		06/01/2020	3...					01/06/2021 11:30:24...
☐	67	Payable invoice - no PO Q514724 (EDF ENER...		07/10/2020						01/06/2021 11:30:38...
☐	68	Payable invoice - no PO BR661501 (KEW ELE...		06/12/2020		er...				01/06/2021 11:39:21...
☐	69	Payable invoice - no PO URI125268		06/01/2020					01/06/2021 11:22:5...	01/06/2021 11:39:25...
☐	70	Payable invoice - no PO TE085902 (BEW)		12/09/2020	100.63	Review (Payables in...	Accountant, Extend...			01/06/2021 11:39:28...
☐	71	Payable invoice - no PO 9649755 (INFOCUS I...		06/10/2020	5,989.40	Review (Payables in...				01/06/2021 11:39:30...

Favorites

| 🔍 |

👥 Dell expences   ⚲ ✏ 🗑

Detach from Workspace, Edit or Delete it.

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Search   ★

[   ]   **Search**

Find buttons for a selection of your favorite Searches, on the Search page.

| Contracts | Dell expences 👥 | Marketing expenses |

⋮ Unpin from workspace
    Edit...
    Delete...

Click to run the Search.

Detach the Search from the Workspace, Edit it or Delete it.

Questions / Answers