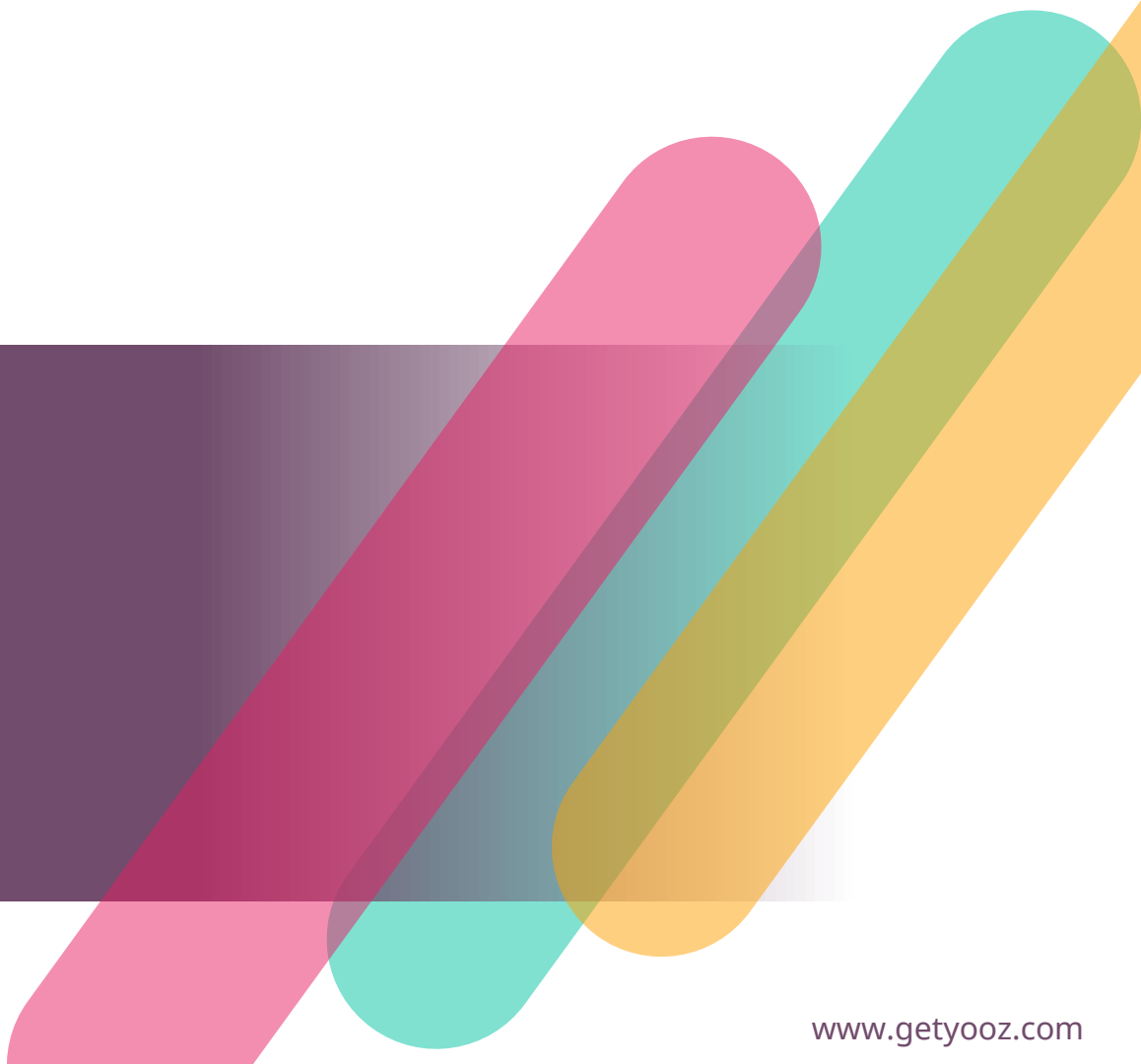




Cloud P2P Automation. Easy. Powerful. Smart.

Yooz Rising: Basic Admin Functions



■ Objective of the training

- Provide knowledge enabling administrators on the new experience Yooz Rising.

■ Training plan

- How to connect ?
- Guided tour and Yooz Support throughout your experience!
- Create your user accesses
- Manage user roles (guidelines, customization, creation)
- View the capabilities of a role
- Edit a complete invoice
- Generate an export of an invoice
- Manage the user notifications and reminders
- Manage the duplicates and dispute
- Editing a complete document

How to connect?

A single address:
<https://us1.getyooz.com>

- 1 →
- 2 →
- 3 →

Username or email

Password

[Forgot Password?](#)

[Log In](#)

Remember me

English ▾



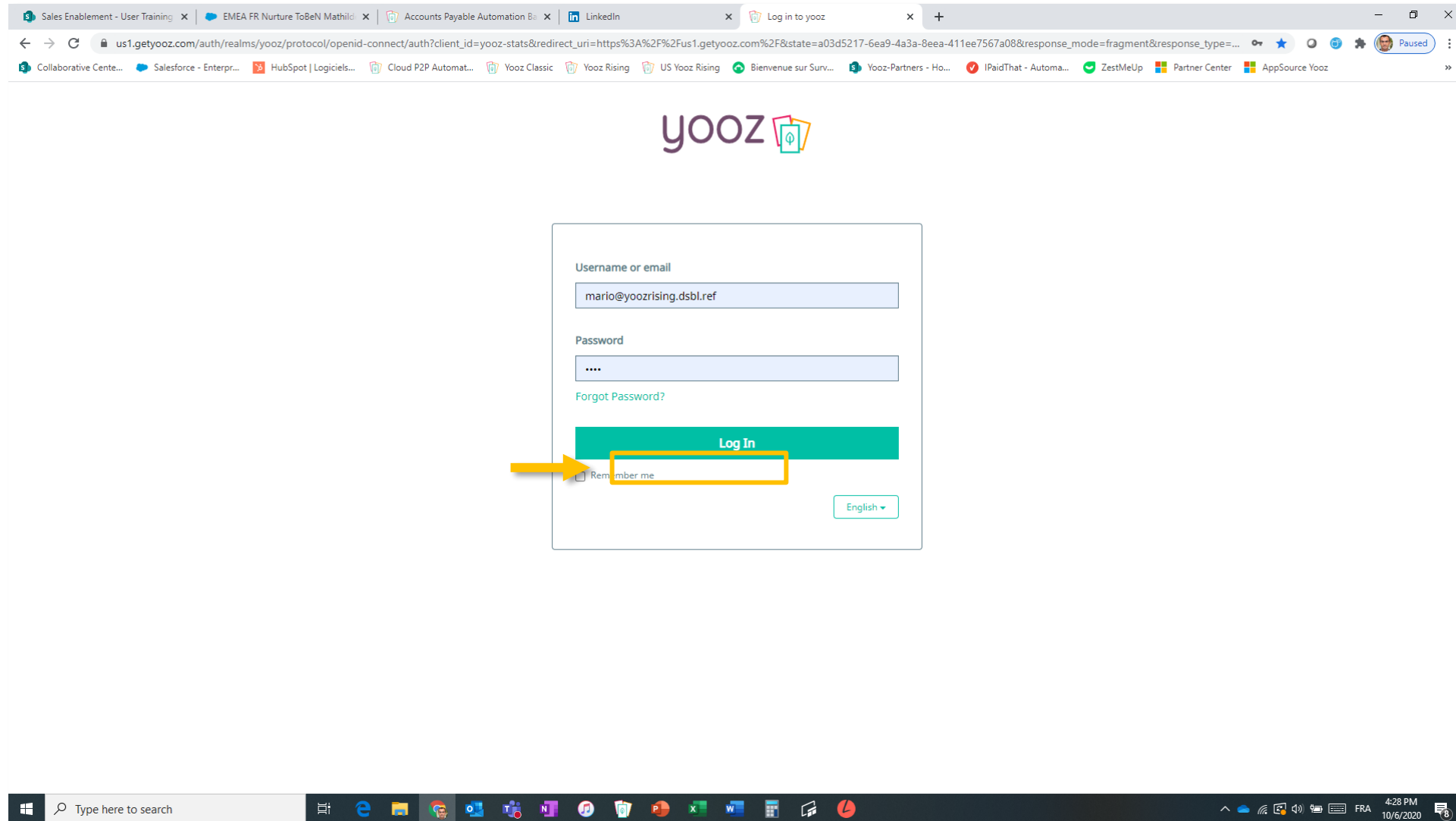
Whitepaper: from Artificial Intelligence to Financial Intelligence

This whitepaper aims to explain clearly how artificial intelligence applies to financial and accounting processes, and its predictable effects.

Read now to learn more!


[Learn more](#)

User dedicated messages and notifications : a continuous newsfeed for Yoozers.



← 📧 ⚠️ 🗑️ 📧 ⌚ 🗑️ 📧 📧 ⋮

Welcome to Yooz application ! ➤

 notification@getyooz.com via sendgrid.net
À moi ▾

A Yooz account has been created with your email address. If this was you, click the link below to verify your email address and create your password

[Follow this link](#)

This link will expire within 720 minutes.

If you didn't create this account, just ignore this message.



You need to change your password.

New Password

Confirm password

Submit



Perform the following action(s): **Update Password**

» [Click here to proceed](#)

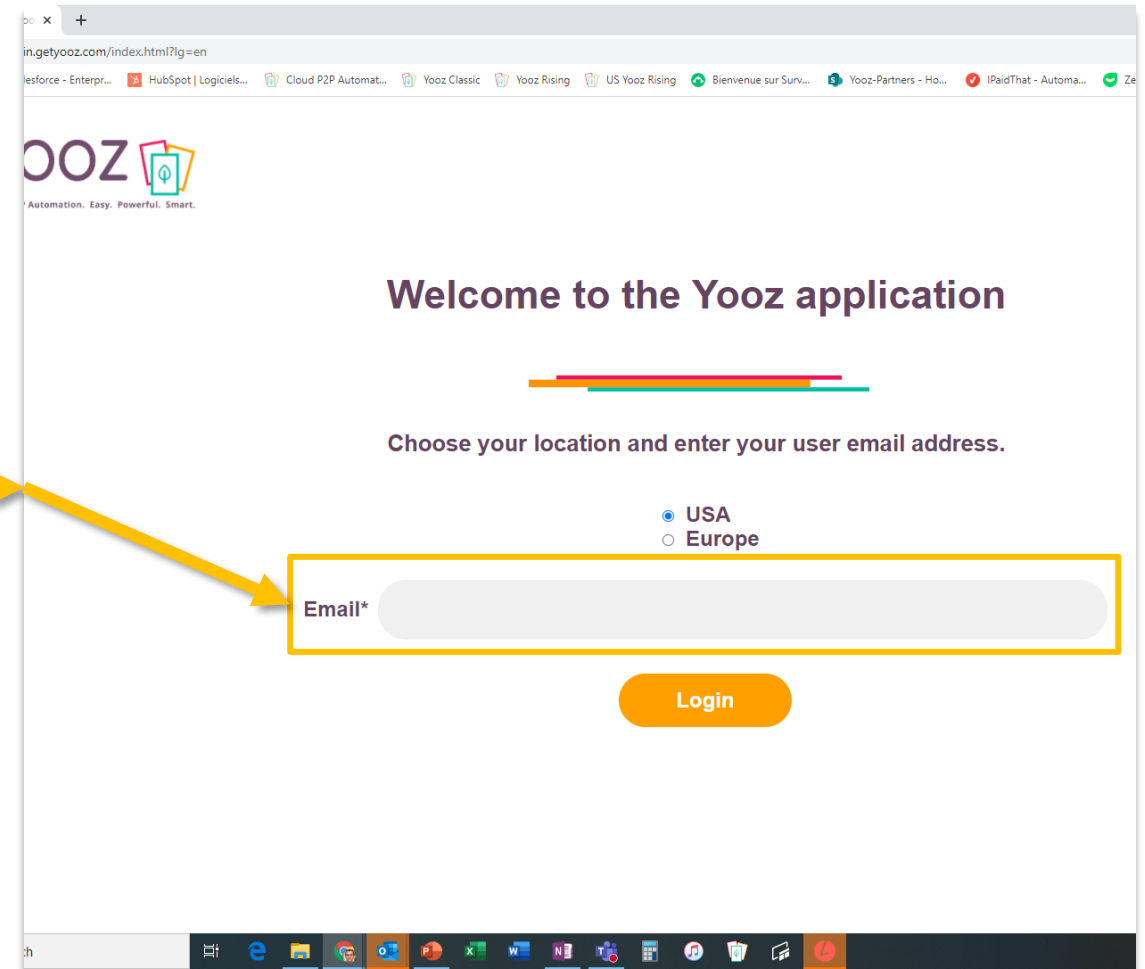
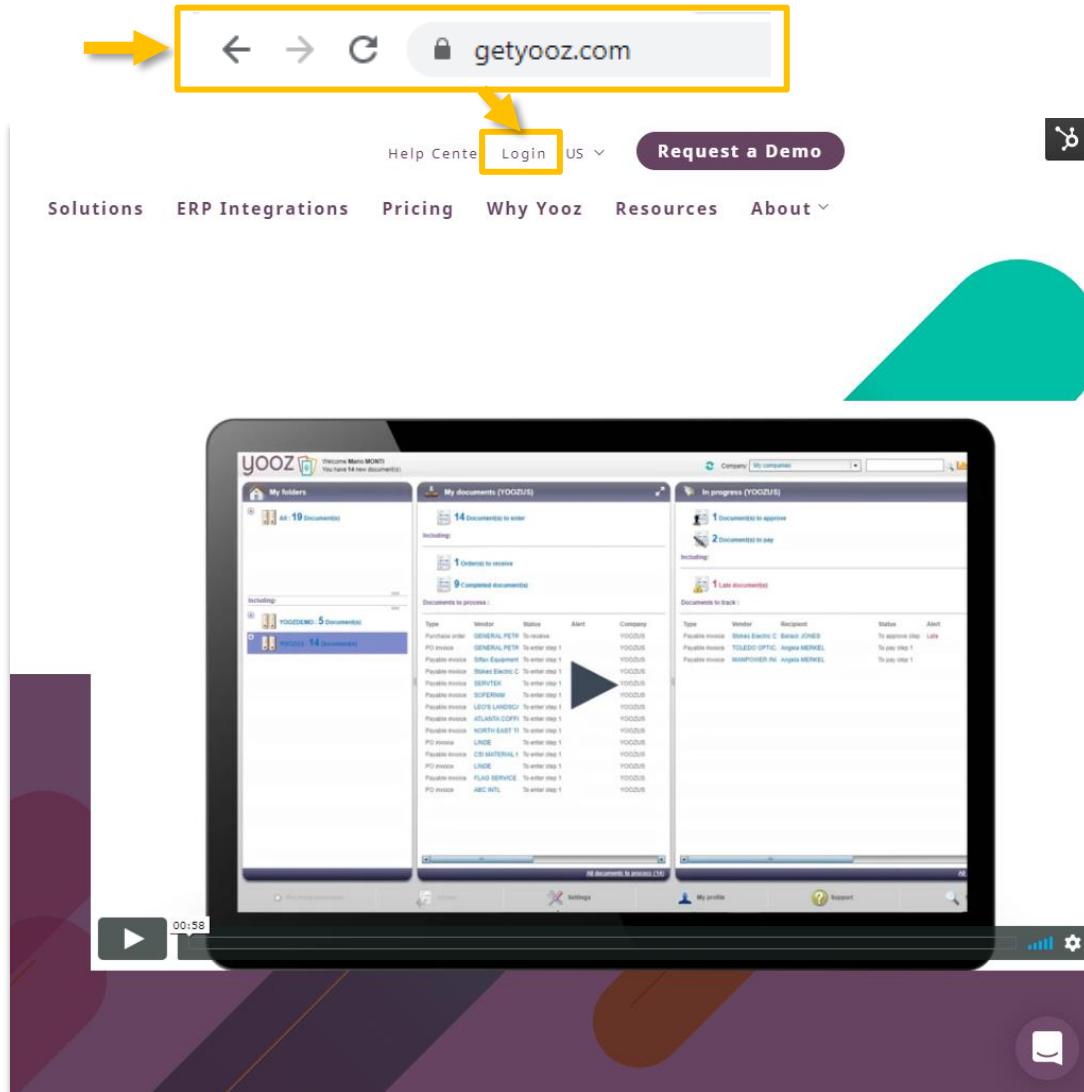
English ▾



Your account has been updated.

« [Back to Application](#)

English ▾

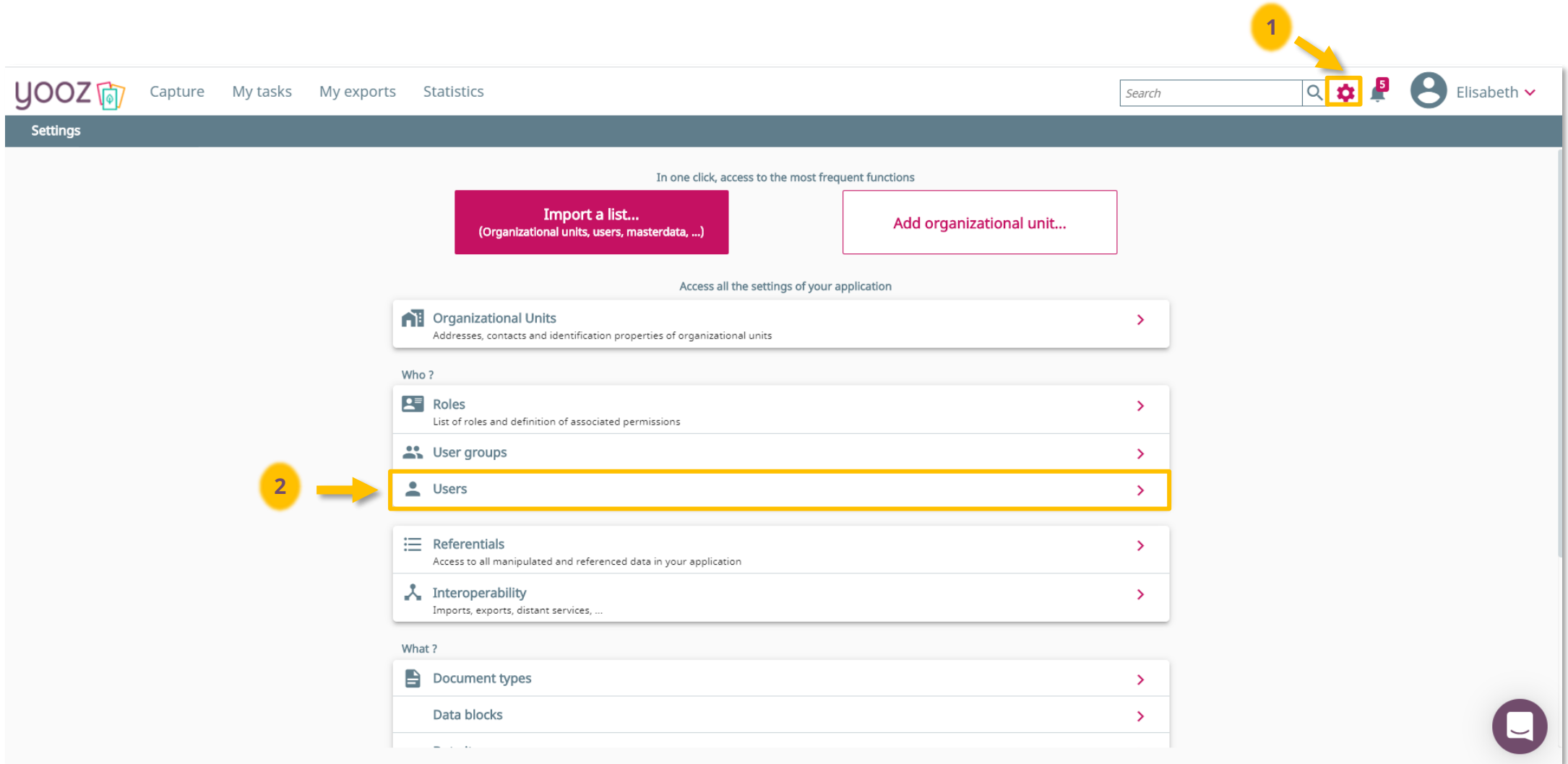


- With an administrator role or at least a permission giving access to set-up features, you will be able to access to the administration settings from the home page, at the top right of the screen.



- Main roles allowing access to the settings : Administrator or Extended Accountant
 - Note : The number of submenus of the settings screen depends on your role and your permissions. For example, an admin will see everything but an accountant will only have access to the functional settings.

Create user access



The screenshot shows the yooz application interface. At the top, there is a navigation bar with the yooz logo, menu items 'Capture', 'My tasks', 'My exports', and 'Statistics', a search bar, and a user profile for 'Elisabeth'. A yellow circle with the number '1' and an arrow points to the settings gear icon in the top right corner. Below the navigation bar is a dark blue header labeled 'Settings'. The main content area is titled 'In one click, access to the most frequent functions' and contains two buttons: 'Import a list...' (with subtext '(Organizational units, users, masterdata, ...)') and 'Add organizational unit...'. Below this is a section titled 'Access all the settings of your application' which lists several settings categories: 'Organizational Units', 'Who?' (containing 'Roles', 'User groups', and 'Users'), 'Referentials', and 'Interoperability'. The 'Users' option under 'Who?' is highlighted with a yellow box, and a yellow circle with the number '2' and an arrow points to it. At the bottom of the settings list, there is a 'What?' section with 'Document types' and 'Data blocks'. A chat icon is visible in the bottom right corner.

3 result(s)

Login	↑	First name	Last name
bouraneelisabeth@...		ELISABETH	BOURANE EN
elisabeth.bourane@...		Elisabeth	Bourane
sales@getyooz.com		Yooz	Sales


List of users already created

Create a new profile



< Users Create

Properties * My account * Roles Groups Themes Workspaces Active date range Cancel Create

Users properties 

First name * Name * Email address * Confidentiality level * Managers

Mandatory data has an asterisk *


You can add or limit roles by the tab « Roles »

You can use the tab « Groups » to add the user to an existing group

The tab « Themes » enable the customization of the user workspace


In the tab « Workspaces » you can see the workspaces available for the user depending on the chosen roles and organize them with the double arrow

My account


Avatar 


Display name * Language * Time zones *

Workspaces

Rank	Name
1 	Capture
2	My tasks
3	My exports
4	Statistics



Users properties 

First name *  Name * Email address * Confidentiality level * Managers



The credentials will be sent to the **e-mail address** of the user.

The **confidentiality level** is graduated from 0 to 5. If a document is imported with level 4 and the user has level 3, he will not be able to get access to it. A user with level 5 has access to all the confidentiality levels.

You can fill the **manager** who will receive reminders.

My account ▾

Avatar





 Display name *  Language * ▾ Time zones * ▾

By clicking on this icon, you can upload the **picture** of the created user. It should be a square, max 19 Mo.

The **displayed name** could differ from the first name and the last name in the tab Properties.

You can select the **language** of your user and modify it.

Set the **time zone** on your user profile allows to have the user's local time on the history for each actions performed on his documents.

yooz 
Capture My tasks My exports Statistics
Search

 5
 Elisabeth ▾

< Users Create

Properties * My account * **Roles** Groups Themes Workspaces Active date range
Cancel Create

User roles ▾

Role	Restrict visibility to some organizational units?
+ ▾ Accountant	<i>If empty the role applies to all organizational units</i>
+ ▾ Controller	<i>If empty the role applies to all organizational units</i>
+ ▾ Extended accountant	<i>If empty the role applies to all organizational units</i>

I select the roles of my user.
 Note : you can combine roles.






You can customize roles by organization. For example, the user will be able to enter documents only for 3 organizations. On the 2 others, he will only have the controller role.

Group assigned roles


Role	Restrict visibility to some organizational units?	User group
		▾


You can add the user to one or many groups. Here, you can see the role depending the group, because the group can provide roles to the users (next screen).


Role	Assignee of tasks	Permissions allowed	Workspaces accessible
Capture agent	Split (if initiated by him)	Import, configure a YooxBox	Capture
Clerk	Entry documents	Editing informations of the documents existing in the tasks	My tasks Search
Accountant	Entry invoices and assets Split (if initiated by him)	Import, delete, export, link Editing informations of the documents existing in the tasks	Capture My tasks My exports Search
Extended accountant	No	Same as the accountant Access to the functional settings (referential databases, exports...)	Capture My tasks My exports Search Settings
Purchasing Clerk	Entry Purchase Requests		
Approver	Approve documents	View, approve documents, edit GL accounts and dimensions	My tasks Search
Controller	No	View and download documents	Search
Administrator	No	All the settings	Search Settings

yooz  Capture My tasks My exports Statistics   5  Elisabeth 






< Users elisabeth.bourane@getyooz.com

Properties * My account * Roles Groups Delegations Themes Workspaces Settings Active date range 


User group 


+  group 1

If a user group has been created, you can associate if you want, the new user to one or many groups.

yooz  Capture My tasks My exports Statistics    Elisabeth 


< Users elisabeth.bourane@getyooz.com

Properties * My account * Roles Groups **Delegations** Themes Workspaces Settings Active date range 

Delegations 

No results

Status	Name	Delegated users	Delegated groups	Delegated roles	Start date	End date	Time Frame	Scope	Last update owner	Last update date
--------	------	-----------------	------------------	-----------------	------------	----------	------------	-------	-------------------	------------------



With the Delegations tab, you can create a delegation for this user. For example, you already know that the user will be out of office every Wednesday afternoon, you can set up his delegation here.





Properties *

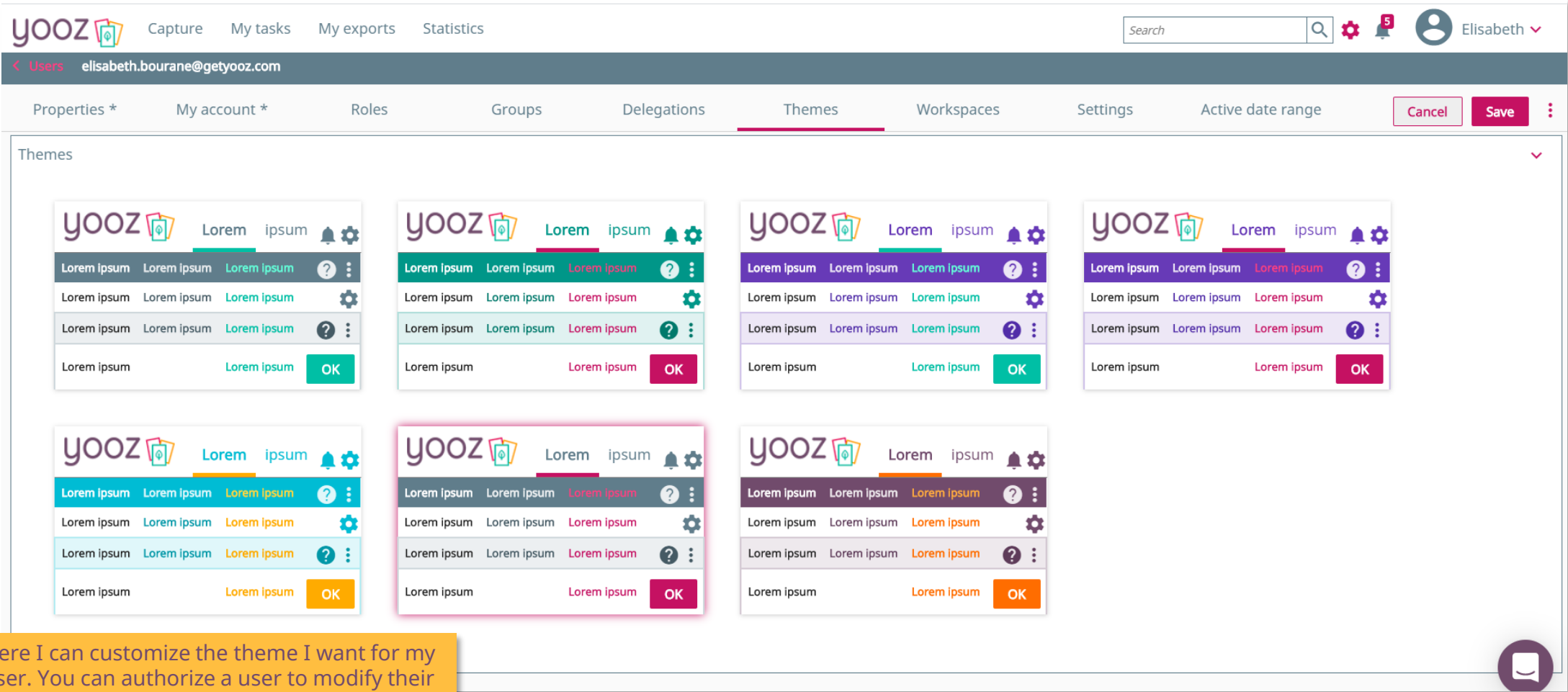
Delegation properties

Name * Periodic Restricted List of delegates *

Delegation periodicity

Start date * End date * Start hour *  End hour * 


Periodicity *








The screenshot shows the 'Themes' management page in the Yooz application. The interface includes a top navigation bar with the Yooz logo, navigation links (Capture, My tasks, My exports, Statistics), a search bar, and user information (Elisabeth). Below the navigation bar are tabs for 'Properties', 'My account', 'Roles', 'Groups', 'Delegations', 'Themes', 'Workspaces', 'Settings', and 'Active date range'. The 'Themes' tab is selected, and the main content area displays a grid of theme preview cards. Each card shows a sample of the theme's appearance, including the yooz logo, navigation items, and a list of items. One card in the second row is highlighted with a pink border. At the bottom right, there is a chat icon.


Here I can customize the theme I want for my user. You can authorize a user to modify their profile or not.





yooz  Capture My tasks My exports Statistics

Search    5  Elisabeth 

< Users elisabeth.bourane@getyooz.com


Properties * My account * Roles Groups Delegations Themes Workspaces Settings Active date range 

Workspaces 

Rank	Name
1 	Capture
2	My tasks
3	My exports
	Statistics

In the tab **Workspaces** you can see the workspaces available depending on the roles of the selected user. You can also **rank** them with the double arrow.

Workspaces

Rank	Name
1 	My tasks
2	Capture
3	My exports
4	Statistics

You can customize the application's settings for this user here.

Select the default supplier display mode (code - name or name - code).

- Display >
- Notifications
Receiving mode, receiving frequency, right to disconnect... >

Customize the way the notifications are sent.

< Parameters

Notifications

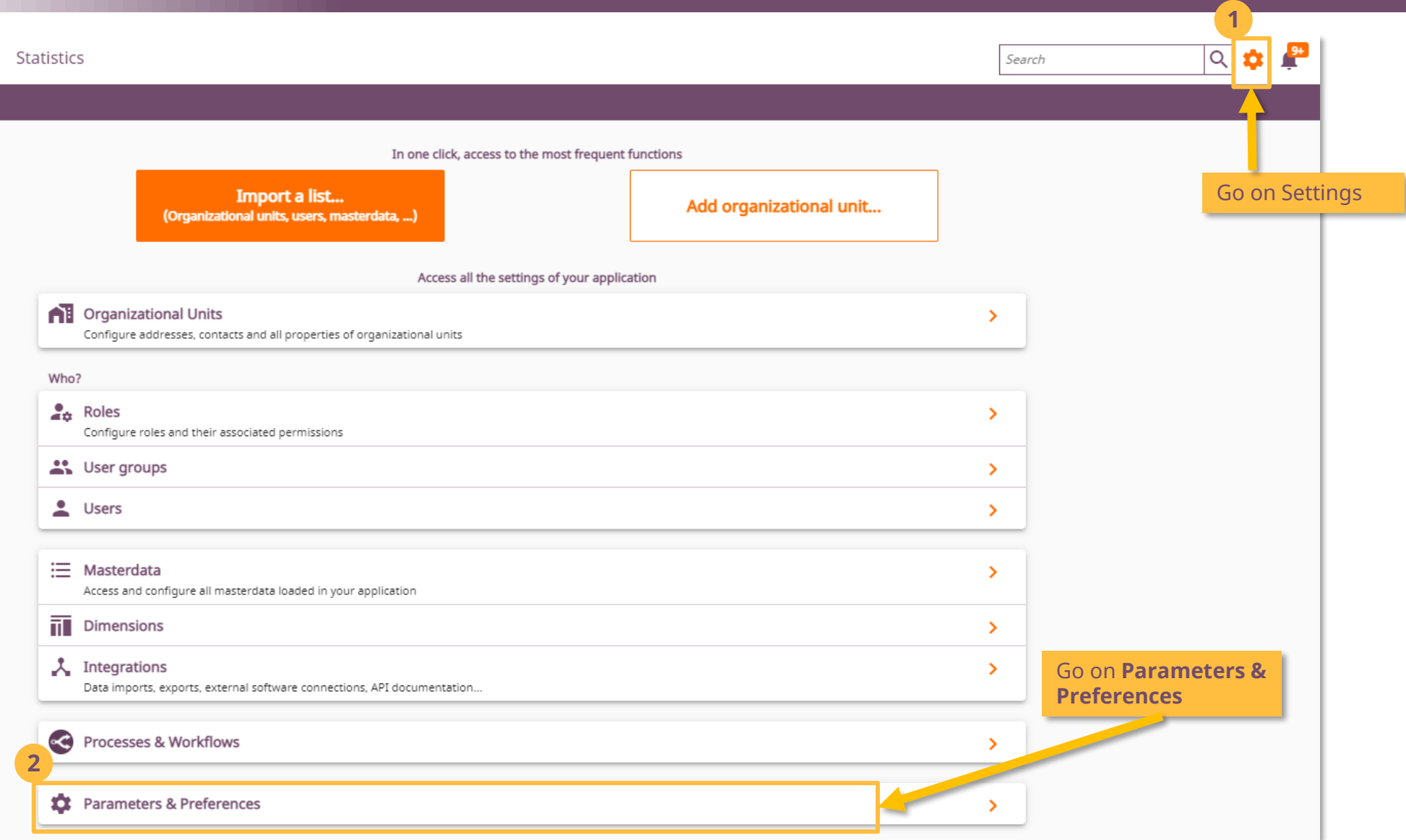
Receiving mode, receiving frequency, right to disconnect...

Notifications by level

- Platform messages
General information message, marketing...
- [Informations](#)
successful import...
- [Messages](#)
Discussion thread (ex : comments in form)
- [Warning messages](#)
Problème mineur détecté
- [Error messages](#)
Problème majeur détecté
- [Critical messages](#)
Problème critique détecté

Right to disconnect
Do not receive notifications outside the application (email, ...)

Manage the user notifications and reminders



The screenshot shows the Yooz application interface. At the top right, there is a search bar and a settings gear icon. A yellow box labeled '1' highlights the settings gear icon, with an arrow pointing to a callout box that says 'Go on Settings'. Below this, the main content area is titled 'Statistics' and contains several functional blocks. The first block is 'In one click, access to the most frequent functions', which includes two buttons: 'Import a list... (Organizational units, users, masterdata, ...)' and 'Add organizational unit...'. The second block is 'Access all the settings of your application', which lists several settings categories: 'Organizational Units', 'Who?' (with sub-items: Roles, User groups, Users), 'Masterdata', 'Dimensions', 'Integrations', and 'Processes & Workflows'. The 'Parameters & Preferences' item at the bottom of this list is highlighted with a yellow box labeled '2'. An arrow points from a callout box labeled 'Go on Parameters & Preferences' to this highlighted item.

1

Go on Settings

2

Go on Parameters & Preferences

■ Go to Notifications

Parameters & Preferences

- Application
- Display
- Documents processing preferences
- Notifications**
Configure notification methods, frequencies, do not disturb hours, etc. Notification levels are defined for each notification in the masterdata.

< Parameters & Preferences

Notifications

Configure notification methods, frequencies, do not disturb hours, etc. Notification levels are defined for each notification in the masterdata.

Notifications by level

- Platform messages** General information messages, Yooz updates ...
- Informations** Information notification level (ex: successful masterdata import...)
- Messages** Message notification level typically for discussion thread (ex: comments in document)
- Warning messages** Warning notification level typically for important information or minor errors
- Error messages** Error notification level typically for major errors
- Critical messages** Critical notification level typically for critical issue

"Do not disturb" hours Do not receive notifications outside of the application (ex: via email, ...)

Customize how you want to notify the user by notification type.

Activate "Do not disturb" hours if needed.

< Parameters & Preferences < Notifications

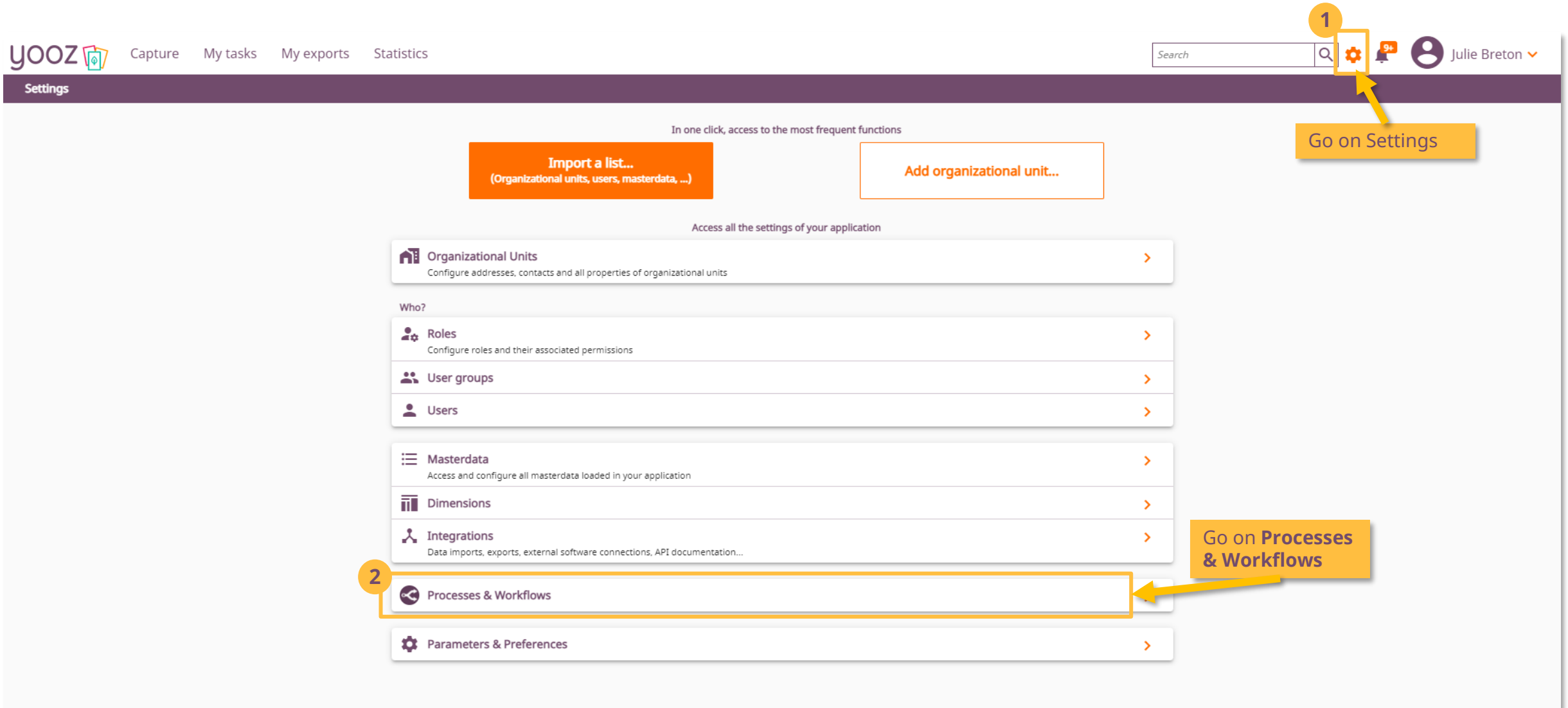
Informations

Information notification level (ex: successful masterdata import...)

- Receive in the notification center**
- Receive by email**

Deactivated >

Choose how users are notified: by email or in their notification center.



The screenshot shows the yooz Settings page. At the top, there is a navigation bar with the yooz logo, 'Capture', 'My tasks', 'My exports', and 'Statistics'. On the right, there is a search bar, a settings gear icon (labeled '1'), a notification bell, and a user profile for 'Julie Breton'. Below the navigation bar, the page title is 'Settings'. The main content area is titled 'In one click, access to the most frequent functions' and contains two buttons: 'Import a list... (Organizational units, users, masterdata, ...)' and 'Add organizational unit...'. Below this, a section titled 'Access all the settings of your application' lists several settings categories, each with a right-pointing arrow: 'Organizational Units', 'Who?' (sub-section), 'Roles', 'User groups', 'Users', 'Masterdata', 'Dimensions', 'Integrations', 'Processes & Workflows' (labeled '2'), and 'Parameters & Preferences'. Two callout boxes with arrows point to the settings gear icon and the 'Processes & Workflows' item, with text 'Go on Settings' and 'Go on Processes & Workflows' respectively.

1

Go on Settings

2

Go on Processes & Workflows

- For these settings, go to « Payables invoice/credit process » then « Settings »

Process

- Other document process
- Payables invoice/credit process**
Modification in progress by Florian Noiret, started on Thursday, 21 January 2021 08:40
- Payables Process

Properties

Phase: Steps:

Review

2 routes (Gateway before review subprocess)

1	WF DEMO
✓	(Défaut)

Process settings

Notify the recipients of the task

Mark tasks as "Late" after a certain time

Configure main actors
Define the stakeholders (users you can transfer a task to) and the business administrators (users who can manage tasks with issues). It can be de (and inherited) or at the phase level.

Modify the form and controls

Mark tasks as "Late" after a certain time

Activate notifications & setup a given time as Late

Mark tasks as "Late" after a certain time

Late if task exceeds (# of days)	Late if phase exceeds (# of days)	Late if process exceeds (# of days)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Remind the recipient(s) with "Late tasks" Deactivated >

Escalate "Late" tasks to other recipients Deactivated >

Managing reminders (3/3)

< Back < Process settings

Mark tasks as "Late" after a certain time

Late if task exceeds (# of days) Late if phase exceeds (# of days) Late if process exceeds (# of days)

Remind the recipient(s) with "Late tasks" Deactivated >

Escalate "Late" tasks to other recipients Deactivated >



< Back < Process settings < Mark tasks as "Late" after a certain time

Remind the recipient(s) with "Late tasks"

Remind every? (# of days) Notify the initiator Notify the manager

Notify the business administrator

Activate reminder management & set the cadence of reminders and the users to be notified.

< Back < Process settings

Mark tasks as "Late" after a certain time

Late if task exceeds (# of days) Late if phase exceeds (# of days) Late if process exceeds (# of days)

Remind the recipient(s) with "Late tasks" Deactivated >

Escalate "Late" tasks to other recipients Deactivated >



< Back < Process settings < Mark tasks as "Late" after a certain time

Escalate "Late" tasks to other recipients

After (# of days) Recipient of the task following the escalation Notify the initiator

Notify the manager Notify the business administrator Notify new task recipients

Notify old task recipients

Activate Escalation management & set the frequency and the recipients

Manage the duplicates and dispute

■ For these settings, go to « **Settings** »



< Parameters & Preferences

Documents processing preferences

- Document deletion >
- Payment configuration **Activated** >
- Invoices and credits >
Configure the behavior of the application for invoices and credits
- Duplicate detection** >

Go to **Parameters & Preferences** → **Documents processing preferences** then **Duplicate detection**.

< Parameters & Preferences < Documents processing preferences

Duplicate detection

- Information level >
- Warning level >
- Error level >

Each validation level can be configured independently:

- Information: non-blocking
- Warning: blocking but forced (suspicion)
- Error: blocking

< Parameters & Preferences < Documents processing preferences < Duplicate detection

Error level

Duplicate detection scope	Third party (vendor, cu...	Document number	Document date	Document total am
+ Application	✓	✓	✓	×

Each control can be applied to:

- The current organizational unit only
- The current organizational unit and its parents (and its hierarchy)
- The entire application (all organizational units)

The checked box means "use this date as a duplicate verification key".

■ For these settings, go to « **Settings** »



< Settings **Masterdata**

Only main elements

21 result(s)

Name	↑	Contains	Concerned organizat
Account types	>	3 elements	All
Accounting periods	>	0 elements	All
Address type	>	3 elements	All
Addresses	>	1 elements	All
Bank accounts	>	0 elements	All
Blocked reasons	>	7 elements	All
Chart of accounts	>	579 elements	All

Go to **Masterdata** then select **Blocked reasons**

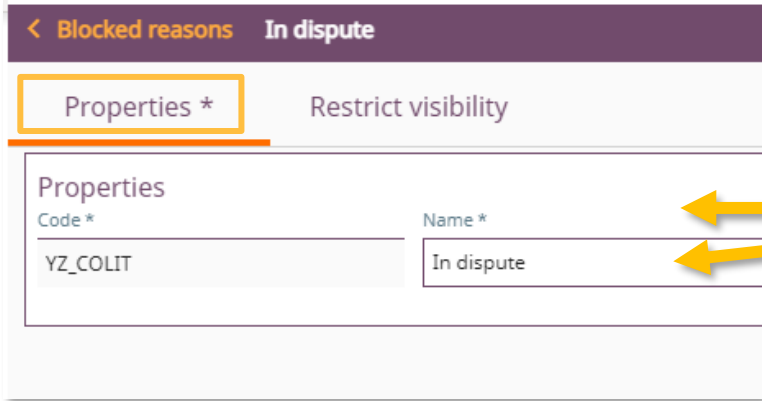
< Settings < Masterdata **Blocked reasons**



7 result(s)

Name	↑	Code	Concerned organiz...
Duplicate		YZ_DUPLI	All
In dispute		YZ_COLIT	All
Missing or erroneous required information		YZ_COMDM	All

Click on + to create a new blocked reason



< Blocked reasons In dispute

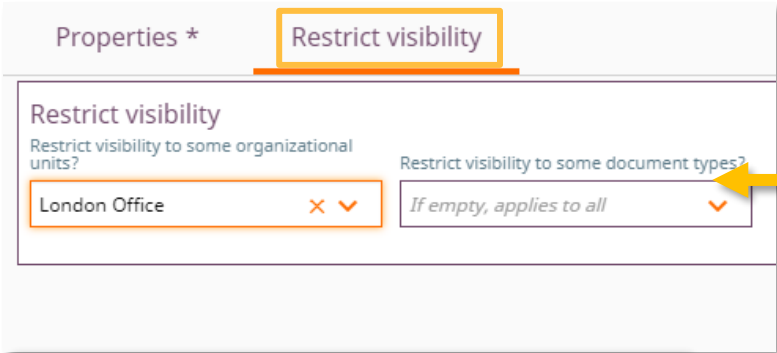
Properties * Restrict visibility

Properties

Code *	Name *
YZ_COLIT	In dispute

Properties :

- Assign a code to the blocking reason
- Name the blocking reason



Properties * Restrict visibility

Restrict visibility

Restrict visibility to some organizational units?

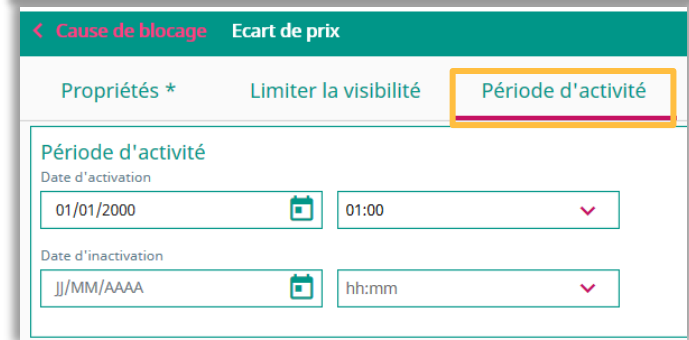
London Office x v

Restrict visibility to some document types?

If empty, applies to all v

Restrict visibility:

- to one or more organizational unit(s)
- to one or more types of documents



< Cause de blocage Ecart de prix

Propriétés * Limiter la visibilité Période d'activité

Période d'activité

Date d'activation

01/01/2000 01:00 v

Date d'inactivation

JJ/MM/AAAA hh:mm v

Period of activity:

Define the period of activation of the blocking reason

Editing a complete document

- To modify a complete document, go to the Workspace My Tasks and open the Invoice.

The screenshot shows the Yooz application interface. At the top, there are navigation tabs: 'Capture', 'My tasks', 'My exports', and 'Statistics'. The user is logged in as 'Nicolas Runtz'. The main area displays a document titled 'Payable invoice - no PO 78110459704 (LINKEDIN)'. The document is shown in a preview window, displaying the invoice details for 'Linked in' (LinkedIn Ireland Unlimited Company). The invoice number is 78110459704, and the balance due is USD 7,200.00. The invoice date is 18-APR-20, and the due date is 18-MAY-2020. The 'Modify' option is highlighted in a dropdown menu that appears when the three-dot menu is clicked.

Click on the 3 dots.

Click on Modify.

The screenshot shows the Yooz interface for reviewing a payable invoice. The main area displays an invoice from LinkedIn. On the right side, there is a menu with several options. A yellow callout box points to the three-dot menu icon, with the text "Click on the 3 dots." Another yellow callout box points to the "Export..." option in the menu, with the text "Click on Export". A purple arrow points from the "Export..." option to a separate "Export" dialog box. This dialog box has a search bar and three options: "Export comptable générique", "Export GED", and "Export SEPA". A yellow callout box points to the "Export" option in the dialog, with the text "Choose an export and click on Export". At the bottom right of the dialog, there are "Cancel" and "Export" buttons, and a "Set a value" link.

Properties

Name *
Payable invoice - no PO 78110459704 (LINKEDIN)

Organizational unit *
Filiale Montpellier (FMTP)

Vendors *
LINKEDIN

Payment method *
Non SEPA wire transfer (VNS)

Document number *
78110459704

Due Date
18/05/2020

Tax amount *
0.00

Currency *
US Dollar (USD)

Converted net amount (excl. tax) *
6.629.83

Converted total amount (incl. tax) *
6.629.83

Description

Invoice data

Ledger *
Description

Invoice lines

Account *	Net amount (excl. tax) *	Tax code *	Tax amount *	Total amount (incl. tax) *	Line description	Nature	Centre de coût	Site
+ FRAIS DE RECRUTEMENT PERS...	7,200.00	TVA Exonérée (TEXO)	0.00	7,200.00	401LINKEDIN du 18/04/20	Recrutement (REC)	Service Commercial (COM)	
	7,200.00		0.00	7,200.00				

Invoice

Invoice Number: 78110459704
Balance Due : USD 7,200.00
Due Date : 18-MAY-2020

Invoice Date : 18-APR-20
Payment Terms : NET 30
PO Number or IO Number :
Advertiser Campaign :
Contract Contact : TALAEI, Aïye
Currency : USD
Payment Method : Invoice

Invoice Details

Order Number	Billing Frequency	Annually Uprfront	Next Invoice Date	N/A
CS5692934-19				

Table

Line	Description	Order Line Amount	Qty	Unit Price	Billed Amount	VAT Amount
1	Recruter - Corporate : 1 of 1 Billing Period From 15/04/2020 To 14/04/2021	7,200.00	1	7,200.00	7,200.00	0.00

Click on the 3 dots.

Click on Export

Choose an export and click on Export

Cancel Export

Set a value

- To Force a task, go to the Search Workspace.
- The prerequisite is the Administrator role.

The screenshot shows the Yooz Search Workspace interface. At the top, there are navigation tabs for 'Capture', 'My tasks', 'My exports', and 'Statistics'. The search bar contains the text 'Factures traitées l'année dernière'. Below the search bar, there are filters for 'Document date : Year Previous' and 'Is processed? (System Data) : Yes'. The main area displays a table with 10 results. The table columns include: Organizational unit, Document type, Third party (vendor...), Document date, Total amount (incl...), Currency, Task, Processed?, Document creation..., Due date, Capture source, Last update date, Last comment, and Confidentiality level. A context menu is open over the table, showing options: Open, Download, Delete, and a three-dot menu. The three-dot menu is highlighted with a yellow box and an arrow pointing to it with the text 'Click on the 3 dots.'. Below the three-dot menu, a sub-menu is visible with options: Export, Force task..., and Send back to ocr. The 'Force task...' option is highlighted with a yellow box and an arrow pointing to it with the text 'Select Force a task.'. A large purple arrow points from the 'Force task...' option to a modal window titled 'Force task'. The modal window shows a list of tasks: Review, Approval 1, Approval 2, and Payment. The 'Review' task is selected. A yellow box with an arrow points to the 'Review' task with the text: 'Then, the Admin has the ability to move the documents backwards in the workflow to any step they choose. The Recipient by default it the user who processed the document in that step.'

Organizational unit	Document type	Third party (vendor...)	Document date	Total amount (incl...)	Currency	Task	Processed?	Document creation ...	Due date	Capture source	Last update date	Last comment	Confidentiality level
No Touch	Estimate - Proforma	VINCI FACILITIES (40...	17/02/2020	1,305.84	Euro (EUR)		✓	11/10/2020 16:17:55		Manual import	15/11/2020 12:42:08		0 - Unclassified
No Touch	Payable invoice - no ...	AMAZON (401AMAZ...	20/02/2020	240.00	Euro (EUR)		✓	11/10/2020 23:37:36	20/03/2020	Manual import	18/07/2021 16:35:31		0 - Unclassified
No Touch	Payable invoice - no ...	METRO (FMETRO)	20/03/2020	833.06	Euro (EUR)		✓	02/03/2021 15:03:49	30/03/2020	Manual import	23/07/2021 09:46:59		0 - Unclassified
Filiale Montpellier	Payable invoice - no ...	ASF (401ASF)	18/04/2020	12.50	Euro (EUR)		✓	01/10/2020 10:55:37	20/04/2020	Manual import	09/04/2021 16:45:19		0 - Unclassified
No Touch	Invoice statement	AMAZON (401AMAZ...	30/06/2020	2,400.00	Euro (EUR)		✓	11/10/2020 23:08:47		Manual import	11/10/2020 23:32:10		0 - Unclassified
No Touch	Invoice statement	VINCI FACILITIES (40...	30/06/2020	22,500.00	Euro (EUR)		✓	09/10/2020 16:07:32		Manual import	15/11/2020 12:42:57		0 - Unclassified
Siège	Delivery slip	DELL (FDELL)	12/07/2020		Euro (EUR)		✓	11/09/2020 09:31:19		Manual import	08/10/2020 17:41:15		0 - Unclassified
Siège	Commercial contract	YOOZ (CONTRAT_YO...	18/09/2020		Euro (EUR)		✓	18/09/2020 21:56:51		Manual import	18/09/2020 22:18:09		0 - Unclassified
Filiale Montpellier	Payable invoice - no ...	GEMSTAR (401GEMS...	25/09/2020	10,417.25	Euro (EUR)		✓	11/10/2020 00:04:48	25/11/2020	Manual import	11/10/2020 00:33:10		0 - Unclassified
Filiale Online	Resume / CV	Gregory Mignon (CV...	05/10/2020	30,000.00	Euro (EUR)		✓	05/10/2020 08:49:21		Manual import	15/11/2020 16:28:56		2 - Confidential

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

1

2

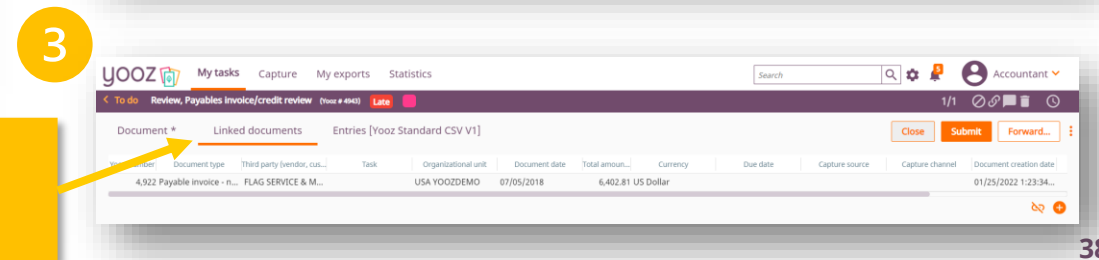
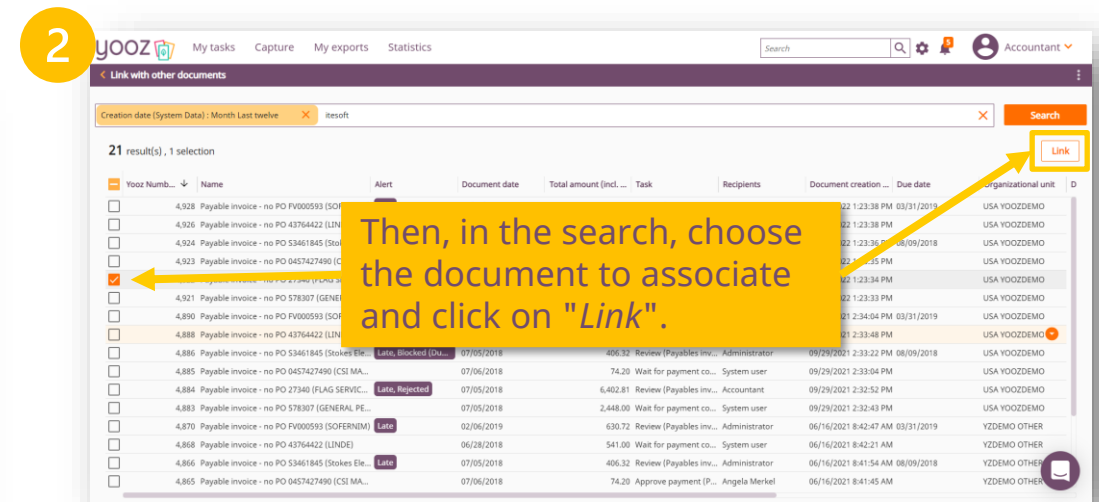
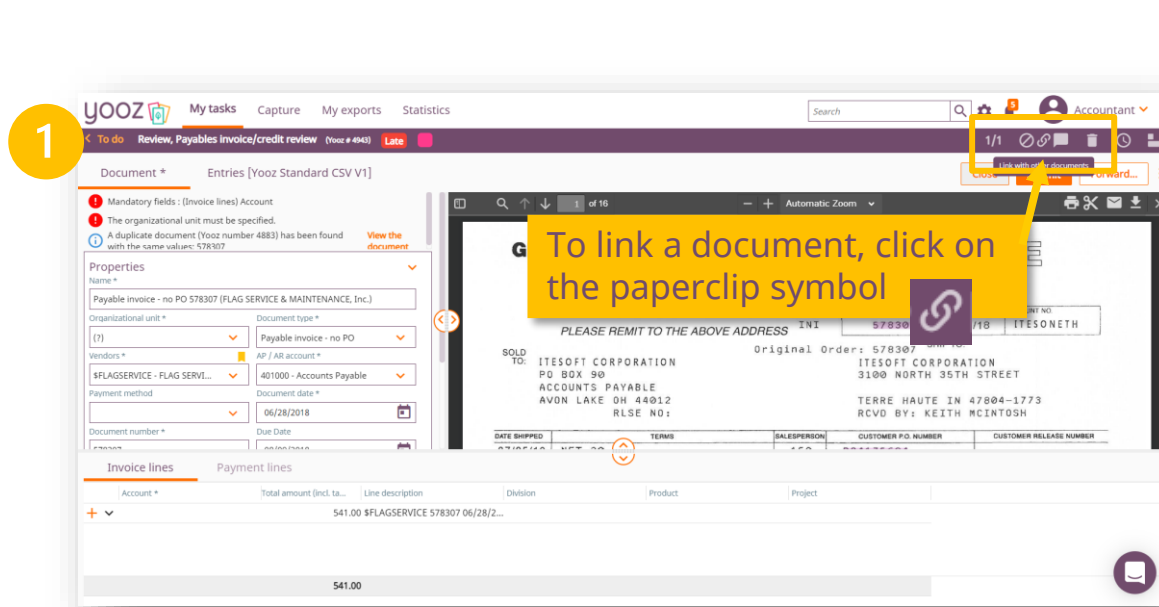
Close Import

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

Until now, to associate two documents...

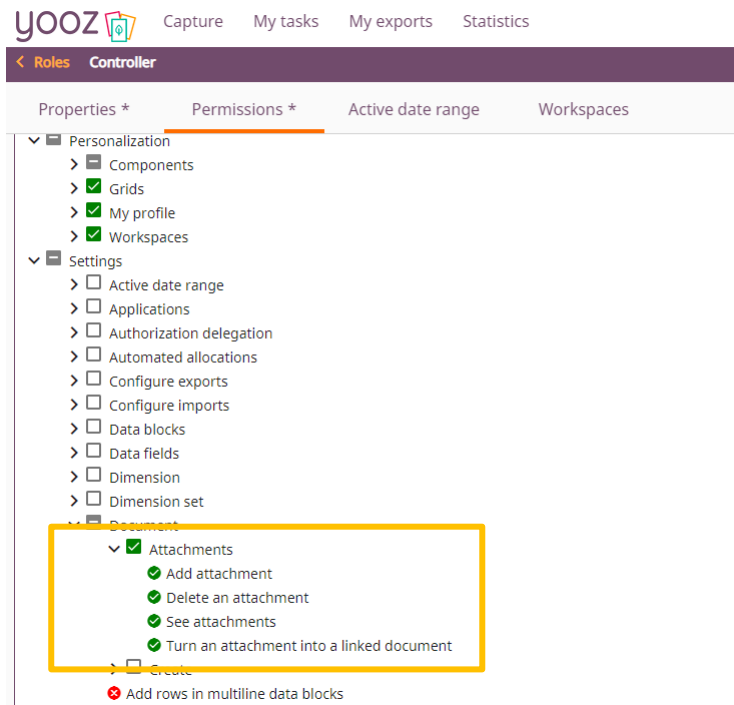
- Before the Attachment add-on, to associate 2 documents you had to use the Linked Document feature. Several drawbacks:
 - Capture the documents independently, then link them.
 - Open each document in turn to view the linked document.



■ It's important to understand the difference between a document and an attachment

	Attachment		Document
Definition	Any type of file associated to a document, and which is not eligible to an automatic treatment process in Yooz.		Any type of document (invoice, PR, PO, quote, etc.) eligible for automated processing in your Yooz application. A document may or may not be linked to another document. This is the notion of master document and linked document.
Formats	Word, jpg, png, gif, xls, ppt, mp3, wave, mp4... except for files considered as "risky" (see FAQ)	PDF	Any type of document that can be captured and converted to PDF.
Full-text Indexing	✗	✓	✓
Click & Reco	✗	✓	✓
Search	✗	✓	✓
Validation process	✗	✗	✓
Applicable workflow	✗	✗	✓
Comments	✗	✗	✓
Level of confidentiality	✗	✗	✓
History	✓	✓	✓

- The setting of permissions related to attachments is done at the level of each user role
 - The permissions are set in *Settings > Roles > [selected role] > Permissions > Settings > Document > Attachments*
 - By default, when activating the Attachment Addon, all permissions are granted to all roles



- The administrator can activate or deactivate permissions per role:
 - To add attachments
 - To delete attachments
 - To see attachments
 - To turn an attachment into a linked document



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Questions / Answers