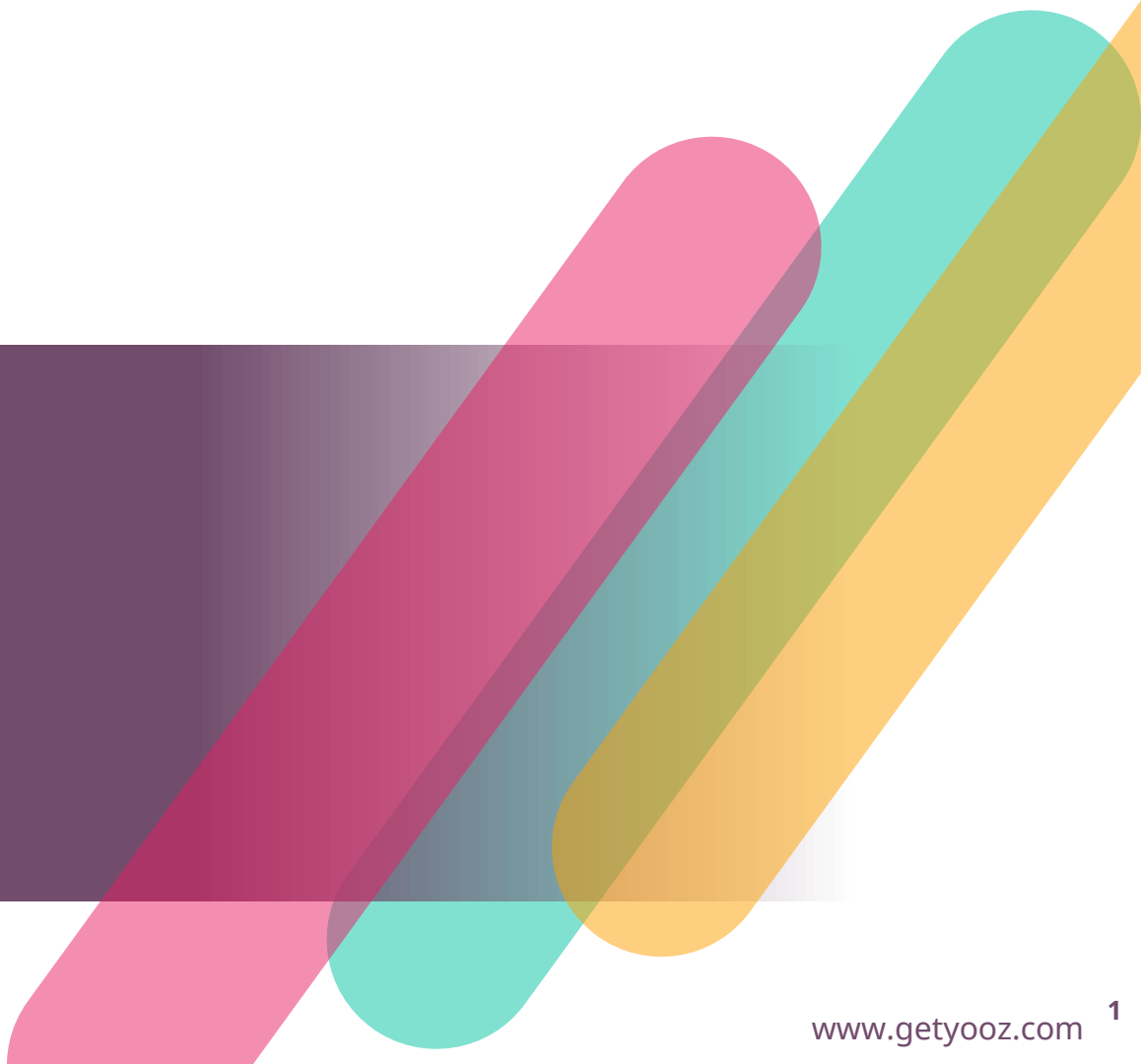




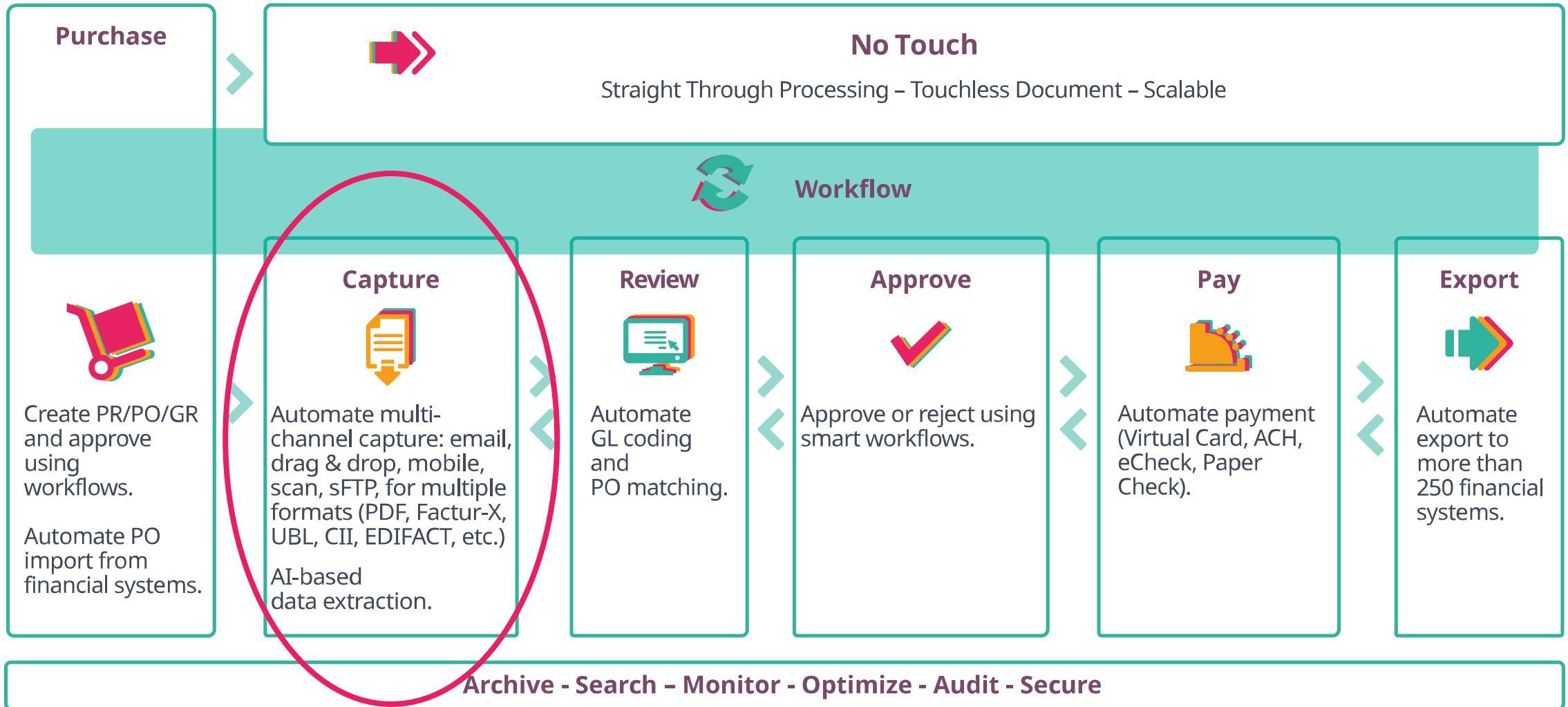
Cloud P2P Automation. Easy. Powerful. Smart.

End-user Training

Capture



Yooz Automates your AP process



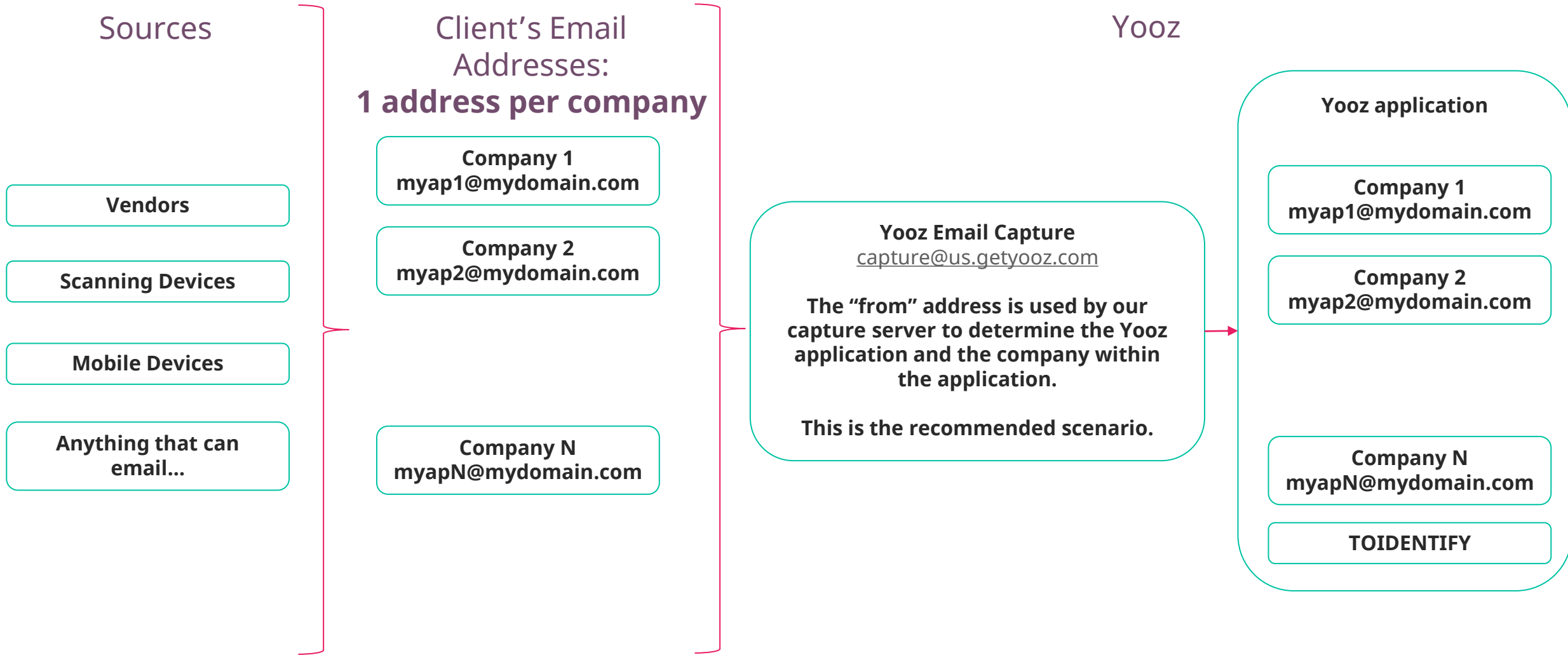
- Yooz can process documents in several file formats:
 - PDF
 - Office documents (Word, Excel or equivalent)
 - DOC, XLS, PPT, DOCX, XLSX, PPTX, ODT, ODS, ODP
 - Images files
 - BMP, GIF, JPEG, JPG, JPE, PNG, TIFF, TIF

- Documents can be imported into Yooz by different means:
 - CaptureMail import
 - Forward invoices as e-mail attachments or in the e-mail body itself.
 - If you use a scanner with e-mail capabilities set it to forward the resulting file as an e-mail for more automation!
 - Mobile import
 - Snap a picture of your documents using Yooz Rising application on your mobile or on your tablet as Yooz Rising is fully responsive.
 - Manual import
 - Import document files directly from any source into Yooz.
 - sFTP server
 - Import document files directly on our sFTP server (not described in this training, please discuss with your project manager or support team)

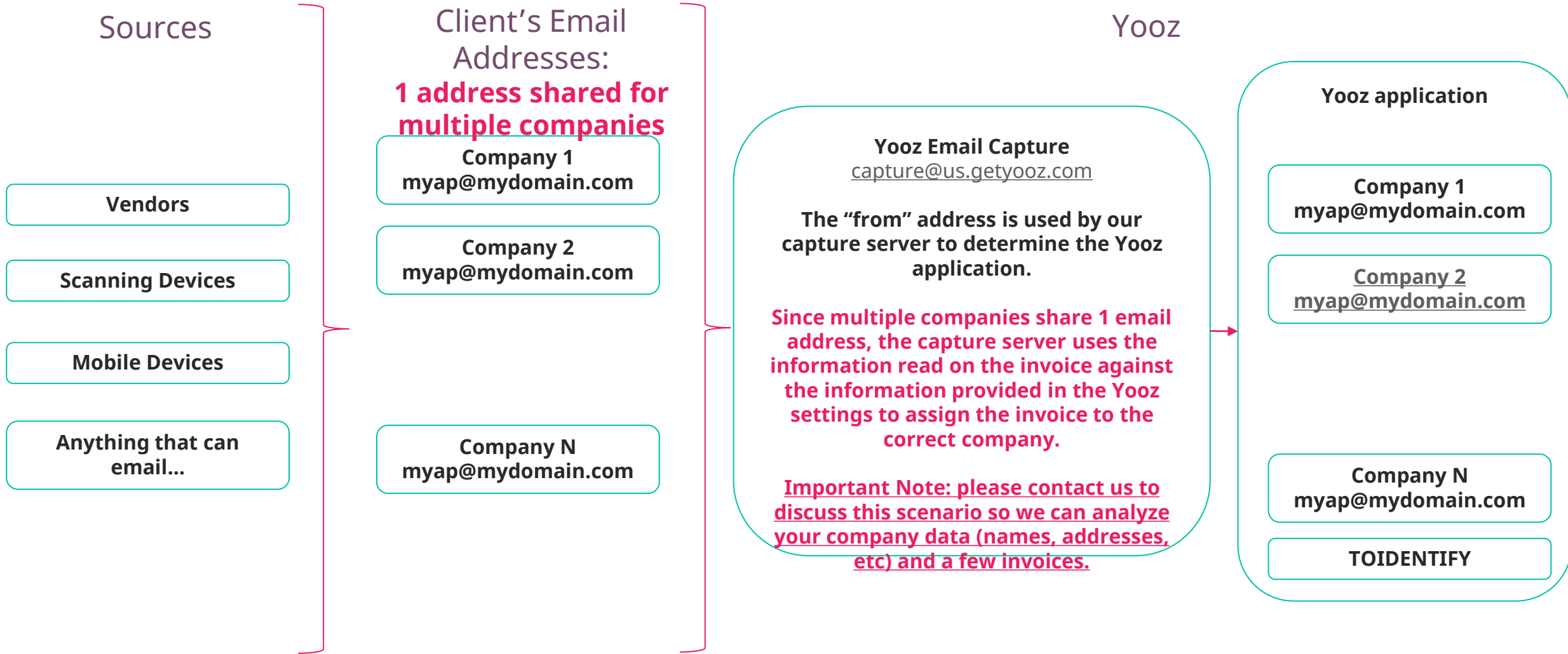
- **For scanned documents, it is highly recommended to set the scanner to a resolution of 300 DPI.**

- You can set one CaptureMail address for each of your companies in Yooz.
 - This is an e-mail address you will need to create inside your network.
 - It should only be used for e-mails containing documents.
 - It should have an auto-forwarding rule (optional but recommended for more automation, could also be manually forwarded) to capture@us.getyooz.com
 - Make sure each e-mail is not a substring of another
 - For example you cannot have 1ap@mydomain.com and 11ap@mydomain.com because the first address is contained into the second one.
- Documents sent to your CaptureMail addresses will be imported automatically into Yooz.
 - If you shared a single address between multiple companies Yooz will try to determine the right one based on the addresses on the document. If it cannot be recognized, it will be sent to the "To Identify" company instead.
- Note: if an email doesn't have any attachment, the body of the email will be imported in Yooz as a document.
- Requirements
 - Email size limit: 36MB.
 - File attached to the email must not be password protected or corrupted.
 - File name must not contain any special characters.

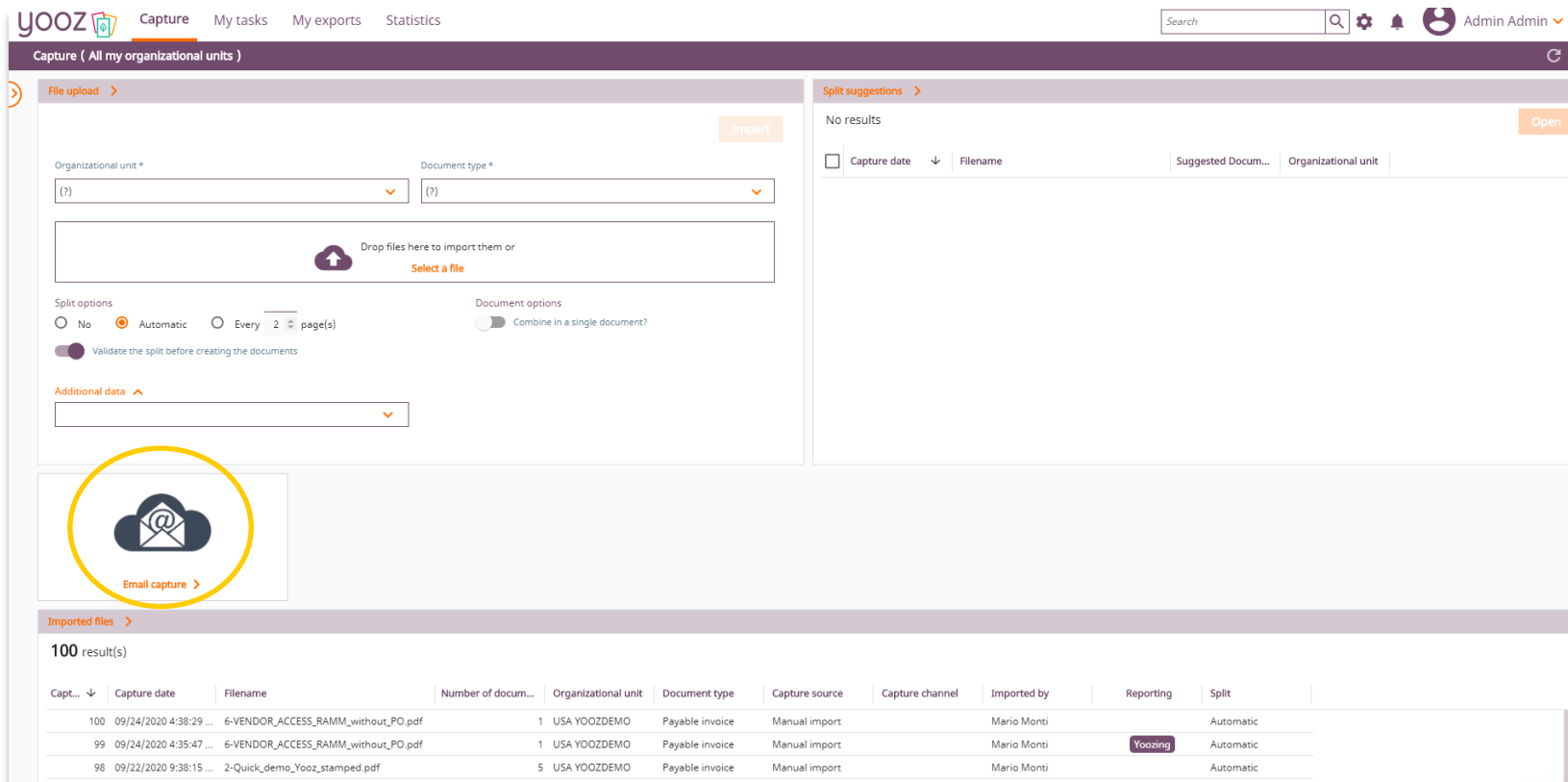
Email Capture Typical Workflow



Email Capture Shared Address Scenario



- To set up your e-mail capture, just click on “E-mail Capture” in your Capture workspace
- The address mapping syncs with our email capture server every night



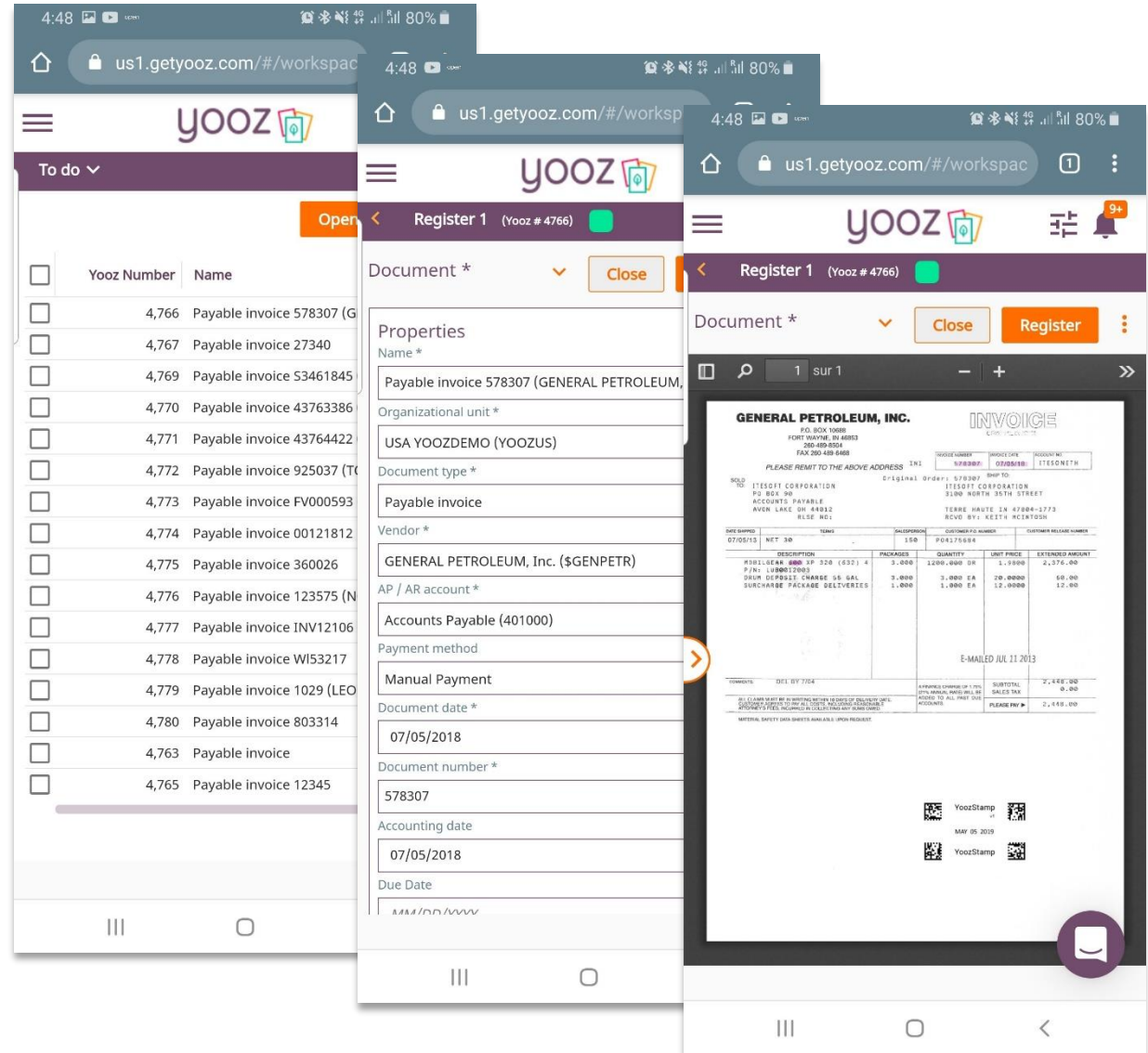
The screenshot shows the Yooz Capture workspace interface. At the top, there are navigation tabs: 'Capture', 'My tasks', 'My exports', and 'Statistics'. A search bar and user profile 'Admin Admin' are also visible. The main content area is divided into several sections:

- File upload:** Contains dropdowns for 'Organizational unit' and 'Document type', a file upload area with a 'Drop files here to import them or Select a file' prompt, and 'Split options' (No, Automatic, Every 2 page(s)) and 'Document options' (Combine in a single document?).
- Split suggestions:** Shows 'No results' and a table with columns for 'Capture date', 'Filename', 'Suggested Docum...', and 'Organizational unit'.
- Email capture:** A button with an email icon and the text 'Email capture >' is highlighted with a yellow circle.
- Imported files:** A table showing 100 results with columns for 'Capt...', 'Capture date', 'Filename', 'Number of docum...', 'Organizational unit', 'Document type', 'Capture source', 'Capture channel', 'Imported by', 'Reporting', and 'Split'.

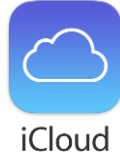
Capt...	Capture date	Filename	Number of docum...	Organizational unit	Document type	Capture source	Capture channel	Imported by	Reporting	Split
100	09/24/2020 4:38:29 ...	6-VENDOR_ACCESS_RAMM_without_PO.pdf	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti		Automatic
99	09/24/2020 4:35:47 ...	6-VENDOR_ACCESS_RAMM_without_PO.pdf	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti	Yoozing	Automatic
98	09/22/2020 9:38:15 ...	2-Quick_demo_Yooz_stamped.pdf	5	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti		Automatic



- Plug-in and app-free
- Just open your mobile browser and connect to Yooz:
<https://us1.getyooz.com/>
- Automated display adjustment to your device (smartphone, tablet)
- Memorization of user preferences (size of window, layout, settings, ...)
- Capture as well as update fields from a mobile device



Import manually from any source into Yooz*

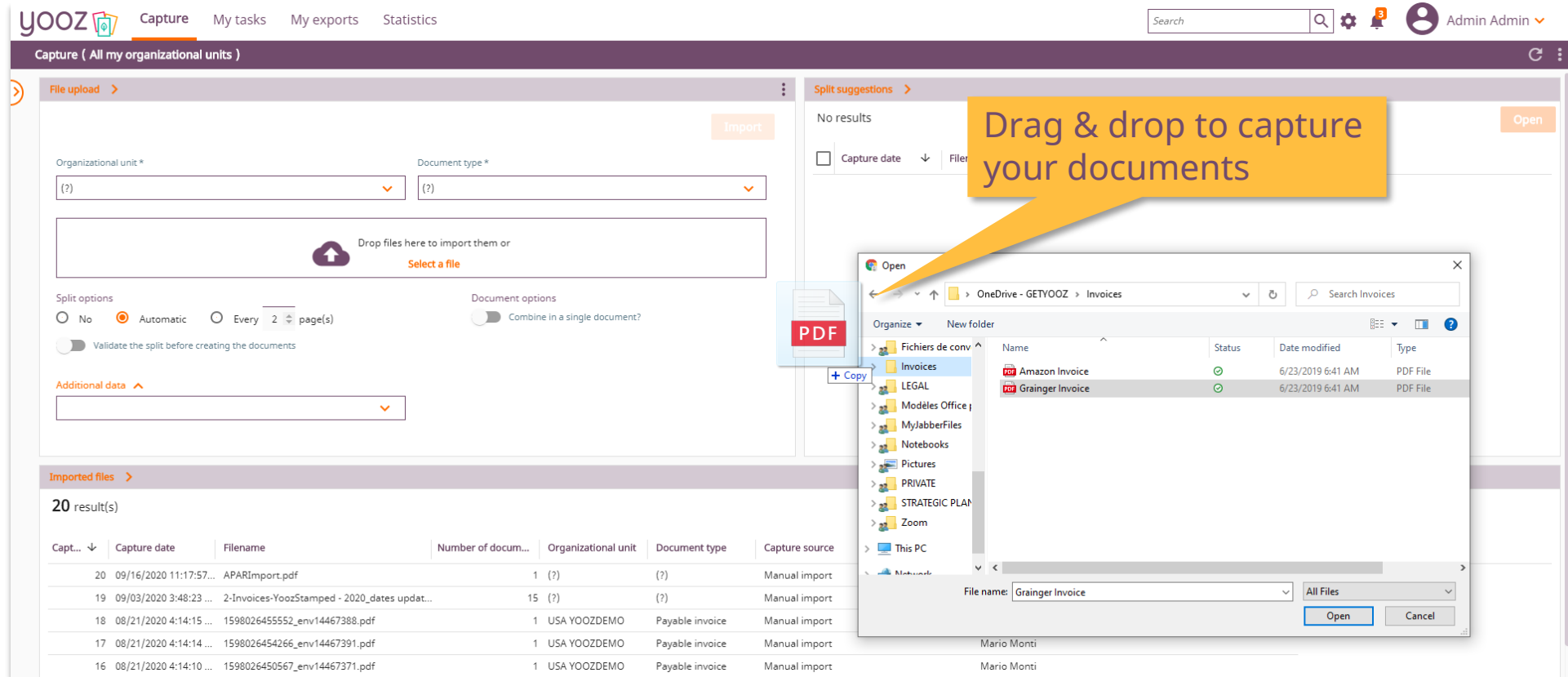


■ Requirement:

- Size limit: 20MB

■ Users with the appropriate role will see the File upload section

■ Click the Select a file button to drag & drop your documents



File upload | Import

Organizational unit* [(?)] | Document type* [(?)]

Drop files here to import them or [Select a file](#)

Split options: No Automatic Every 2 page(s) | Document options: Combine in a single document?

Additional data [v]

Imported files | 20 result(s)

Capt...	Capture date	Filename	Number of docum...	Organizational unit	Document type	Capture source
20	09/16/2020 11:17:57...	APARImport.pdf	1	(?)	(?)	Manual import
19	09/03/2020 3:48:23 ...	2-Invoices-YoozStamped - 2020_dates updat...	15	(?)	(?)	Manual import
18	08/21/2020 4:14:15 ...	1598026455552_env14467388.pdf	1	USA YOOZDEMO	Payable invoice	Manual import
17	08/21/2020 4:14:14 ...	1598026454266_env14467391.pdf	1	USA YOOZDEMO	Payable invoice	Manual import
16	08/21/2020 4:14:10 ...	1598026450567_env14467371.pdf	1	USA YOOZDEMO	Payable invoice	Manual import

*Thick client inbox | Dropbox, Google Drive, Amazon Drive, ... locally synced

Automatic identification and batch split

Let Yooz identify automatically (?) the invoiced organizational unit or type it in

Let Yooz identify automatically (?) the document type or type it in

The screenshot shows the Yooz application interface. At the top, there's a search bar and user information for 'Admin Admin'. Below that, there's an 'Import' button and a file upload area with a 'Grainger Invoice.pdf' file. The 'Split options' section has radio buttons for 'No', 'Automatic' (selected), and 'Every 2 page(s)'. There's also a 'Document options' section with a 'Combine in a single document?' toggle. A 'YoozBox Configuration' section is visible below. At the bottom, there's a table with columns: 'Capture date', 'Filename', 'Number of docum...', 'Organizational unit', 'Document type', 'Capture source', 'Capture channel', 'Imported by', 'Reporting', and 'Split'. The table contains several rows of data for 'Payable invoice' documents.


Let Yooz automatically split your document batches w/o any splitter using YoozSmartSplit exclusive technology or split them manually






Find here the split suggestions you need to approve if you have decided to do so



Activate or not the manual approval of automatic Yooz SmartSplit


- Yooz has several ways of splitting a file containing multiple documents.
- Automatic
 - Using the exclusive YoozSmartSplit technology w/o any pre-sorting
 - Or Yooz will split a file into multiple documents when:
 - It recognizes the page was stamped using a YoozStamp (see slides after)
 - It reads a blank page that was used as a separator between two documents.
- Predefined using “Fixed number of pages”
 - Yooz will split the file every certain amount of pages per the user choice on the import screen.
- Manual
 - You can split a Yooz document manually once it has been imported using the scissors feature on the invoice screen (visible only on multipage documents).

User friendly validation of the automated split

yooz  Capture My tasks My exports Statistics



Search     Mario Monti 


< Capture Cutting proposals (All my organizations)  


No results 

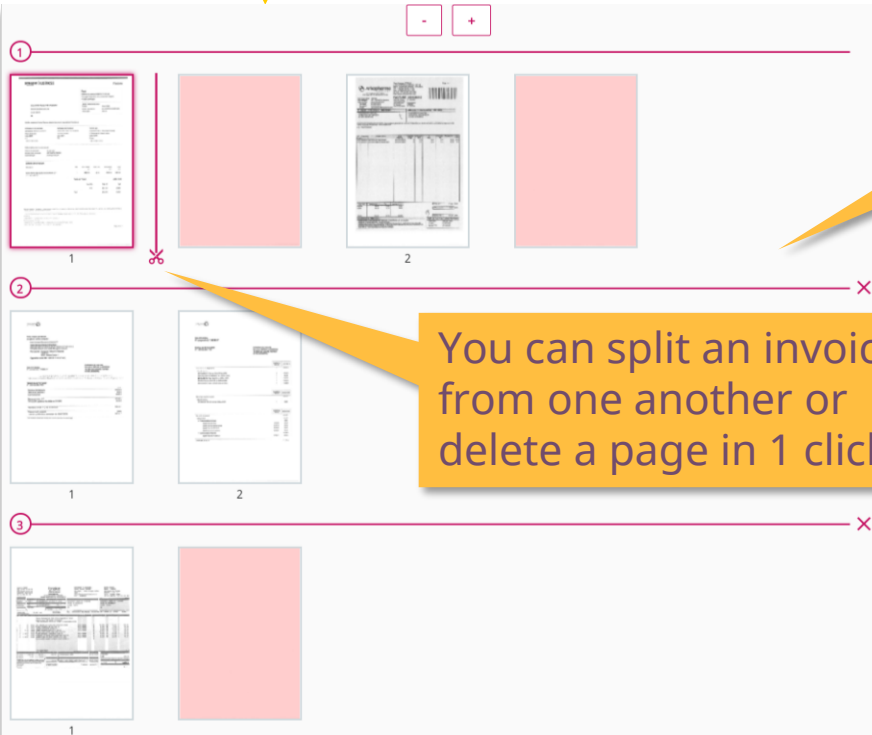
Capture date | Filename | Proposal Docu... ↑ | Organisation

Yooz suggests to split this batch into n invoices and you can review the suggested split and modify it

1  

2 

3 



You can split an invoice from one another or delete a page in 1 click

Zoom automatique+

MATERIAL HANDLING, INC.
 3075 Avenue B
 Bethlehem, PA 18017
 Phone (610)868-1481 Fax (610)866-5115

REMIT TO:
 3075 Avenue B
 Bethlehem, PA 18017

PAGE 01 INVOICE NUMBER 04S7427490
 DATE 07/06/18

313030 313031

ITESOFT CORPORATION
 ACCOUNTS PAYABLE
 P O BOX 90
 AVON LAKE OH 44012

ITESOFT CORPORATION
 2513 HIGHLAND AVE
 BETHLEHEM PA 18017

SHIP TO

---NET 10 DAYS---

QTY ORDERED	QTY SHIPPED	BACK ORDERED	PRODUCT CODE	DESCRIPTION	PRICE EACH	TOTAL
1	1		0000 #291	PM BILLING	70.00	70.00
				TOTAL MATERIAL		70.00

The screenshot shows the 'yoozdemorefrising' application interface. The top navigation bar includes 'yooz', 'Capture', 'My tasks', 'My exports', and 'Statistics'. A search bar and user profile 'Admin Admin' are on the right. The main content area is titled 'Capture (All my organizational units)' and is divided into two main sections: 'File upload' and 'Split suggestions'.

File upload section:

- Buttons: 'Import' (highlighted), 'Reset'.
- Fields: 'Organizational unit *' and 'Document type *' (both with '(?)' dropdowns).
- File list: 'Grainger Invoice.pdf' with a close button.
- Drop zone: 'Drop files here to import them or Select a file'.
- Split options: Radio buttons for 'No', 'Automatic' (selected), and 'Every 2 page(s)'. A toggle for 'Validate the split before creating the documents' is also present.
- Document options: Toggle for 'Combine in a single document?'.
- Additional data dropdown: Expanded to show 'Name', 'Third parties(Supplier, Customer, ...)', 'Document number', 'Document date', and 'Due Date'. A callout points to this dropdown.

Split suggestions section:

- Status: 'No results'.
- Buttons: 'Open'.
- Table headers: 'Capture date', 'Filename', 'Organizational unit'.
- Callout: 'Final step: click on Import' points to the 'Import' button in the 'File upload' section.

Imported files section:

- Summary: '100 result(s)'.
- Table with columns: Capt..., Capture date, Filename, Number of docum..., Organizational unit, Document type, Capture source, Capture channel, Imported by, Reporting, Split.
- Table content (partial):


Capt...	Capture date	Filename	Number of docum...	Organizational unit	Document type	Capture source	Capture channel	Imported by	Reporting	Split
100	09/24/2020 4:38:29 ...	6-VENDOR_ACCESS_RAMM_without_PO.pdf	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti		Automatic
99	09/24/2020 4:35:47 ...	6-VENDOR_ACCESS_RAMM_without_PO.pdf	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti	Yoozing	Automatic
98	09/22/2020 9:38:15 ...	2-Quick_demo_Yooz_stamped.pdf	5	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti		Automatic
97	09/22/2020 9:38:15 ...	1-Grainger_with_PO_2020.tif	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti		Automatic
96	09/18/2020 11:21:17...	2-Quick_demo_Yooz_stamped.pdf	5	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti		Automatic
95	09/18/2020 11:21:16...	1-Grainger_with_PO_2020.tif	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti		Automatic
94	09/18/2020 8:53:55	3-ARC INTL inv	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti	Yoozing	Automatic

- Positioned on the first page of each invoice, the YoozStamp serves as a separator, allowing the batch to be automatically split into as many files as there are different invoices it contains.
- Stamping an invoice:
 - provides physical proof that the said invoice has been scanned and Yoozed
 - prevents the risk of scanning the same invoice twice; even if Yooz automatically detects duplicates, this avoids deleting invoices scanned twice.



Display the full list of captured files

Application : yoozdemorefrising Change application

yooz  **Capture** My tasks My exports Statistics


Capture (All my organizational units)

File upload >

Import

X


Grainger Invoice.pdf

 Drop files here to import them or
Select a file

Reset

Split options: No Automatic Every 2 pages

Document options: Validate the split before creating the documents



Email capture >

Split suggestions >

No results

Capture date Filename

Columns selection

Selection

- Capture date
- Filename
- Suggested Documents ↑↓
- Organizational unit
- Document type
- Capture source
- Capture channel

Cancel
OK

Here is the full list of imported documents and their related masterdata

You can customize the number and types of columns to be displayed

Imported files >

100 result(s)

Capt...	Capture date	Filename	Number of docum...	Organizational unit	Document type	Capture source	Capture channel	Imported by	Reporting	Split
100	09/24/2020 4:38:29 ...	6-VENDOR_ACCESS_RAMM_without_PO.pdf	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti		Autom
99	09/24/2020 4:35:47 ...	6-VENDOR_ACCESS_RAMM_without_PO.pdf	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti	Yoozing	A
98	09/22/2020 9:38:15 ...	2-Quick_demo_Yooz_stamped.pdf	5	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti		
97	09/22/2020 9:38:15 ...	1-Grainger_with_PO_2020.tif	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti		Autom

The screenshot displays the Yooz document import interface. At the top, there are two dropdown menus with question marks. Below them is a file upload area for 'Grainger Invoice.pdf' with a 'Drop files here to import them or Select a file' prompt. There are also 'Split options' (No, Automatic, Every 2 page(s)) and 'Document options' (Combine in a single document?). An 'Additional data' dropdown is open, showing fields like Name, Third parties, Document number, Document date, and Due Date. Below this are 'capture' and 'Automated Invoice collector' buttons. At the bottom, a table titled 'Imported files' shows 100 results. The table has columns for Capture date, Filename, Number of documents, Organizational unit, Document type, Capture source, Capture channel, Imported by, Reporting, and Split. The 'Reporting' column contains 'Yoozing' for several rows, with one instance circled in yellow.

Capt...	Capture date	Filename	Number of docum...	Organizational unit	Document type	Capture source	Capture channel	Imported by	Reporting	Split
100	09/24/2020 4:38:29 ...	6-VENDOR_ACCESS_RAMM_without_PO.pdf	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti		Automatic
99	09/24/2020 4:35:47 ...	6-VENDOR_ACCESS_RAMM_without_PO.pdf	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti	Yoozing	Automatic
98	09/22/2020 9:38:15 ...	2-Quick_demo_Yooz_stamped.pdf	5	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti		Automatic
97	09/22/2020 9:38:15 ...	1-Grainger_with_PO_2020.tif	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti		Automatic
96	09/18/2020 11:21:17...	2-Quick_demo_Yooz_stamped.pdf	5	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti	Yoozing	Automatic
95	09/18/2020 11:21:16...	1-Grainger_with_PO_2020.tif	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti		Automatic
94	09/18/2020 8:53:55	3-ARC TNTI inv	1	USA YOOZDEMO	Payable invoice	Manual import		Mario Monti	Yoozing	Automatic

■ Once imported documents are in “Yoozing” status

- Vendor recognition
- Smart data extraction
- Full text indexing

■ Wait for the Yoozing status to disappear before opening the document.



Cloud P2P Automation. Easy. Powerful. Smart.

Enjoy working with Yooz!



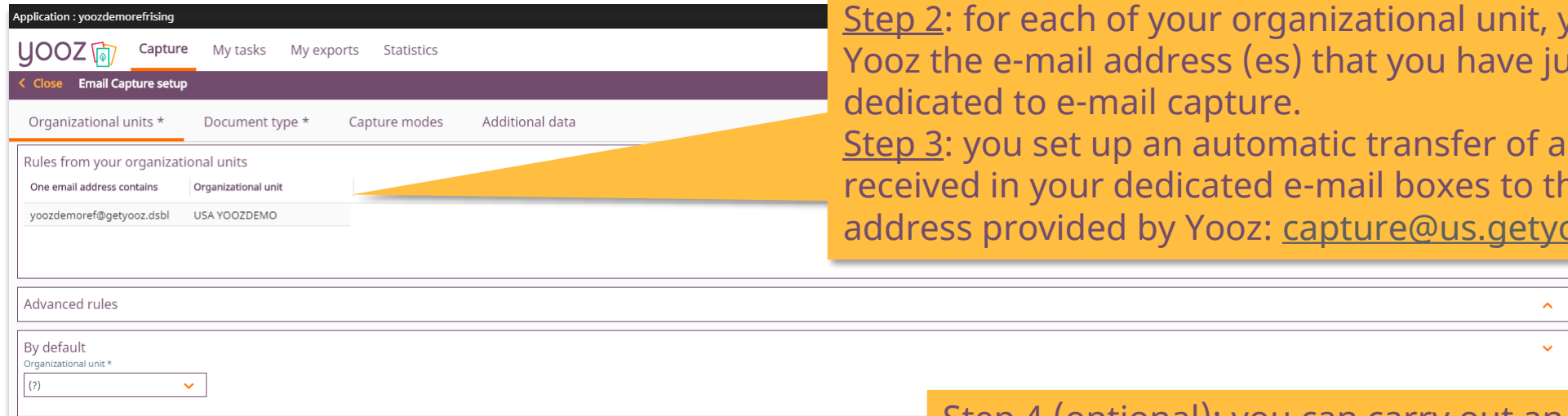
Cloud P2P Automation. Easy. Powerful. Smart.

For Admin User Only

Step 1: you provide one or more e-mail boxes dedicated to the receipt of invoices by your suppliers.

Step 2: for each of your organizational unit, you set in Yooz the e-mail address (es) that you have just dedicated to e-mail capture.

Step 3: you set up an automatic transfer of all e-mails received in your dedicated e-mail boxes to the e-mail address provided by Yooz: capture@us.getyooz.com.



Step 4 (optional): you can carry out an advanced set-up of the e-mail capture in Yooz: email object, split rules, type of document, etc.

