



Cloud P2P Automation. Easy. Powerful. Smart.

Yooz Rising Training – Business Edition

Approving a document on your laptop and
your smartphone

■ Objective of the training

- Learn how to Approve documents in Yooz Rising on your laptop and on your smartphone.

■ Prerequisites

- None.

■ Targeted audience

- This training is for Users with the Approver Role.

■ Duration

- 30-minutes.

■ Introduction

- AP Process in Yooz Rising
- Yooz Rising

■ How to access on your laptop

■ Your User Interface

- Main screen – top bar
- My profile – Settings

■ How to Approve a document

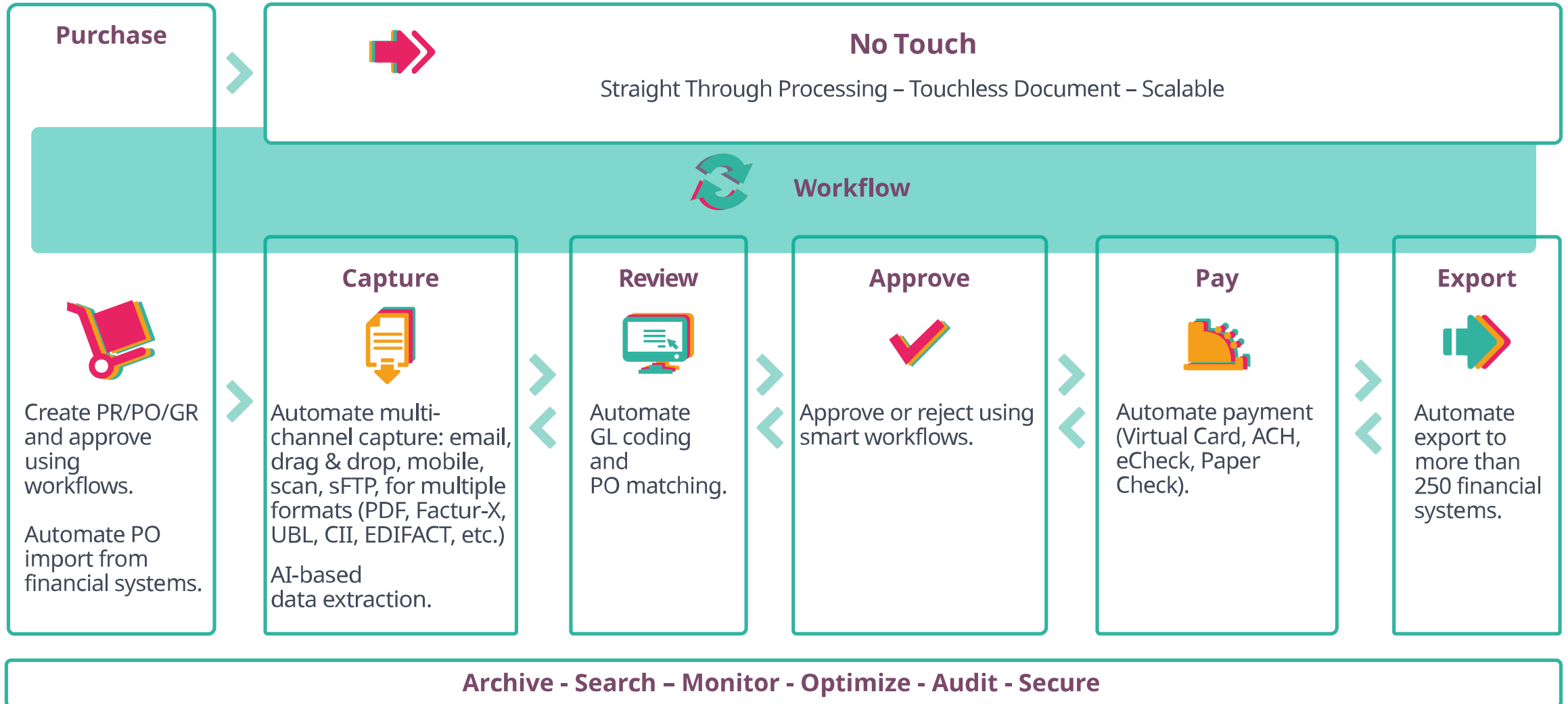
■ How to Search a document

■ Yooz Rising on your smartphone

- Create a Home screen icon on your smartphone
- Navigate the Yooz Rising interface
- Approve, Reject and Forward

Introduction

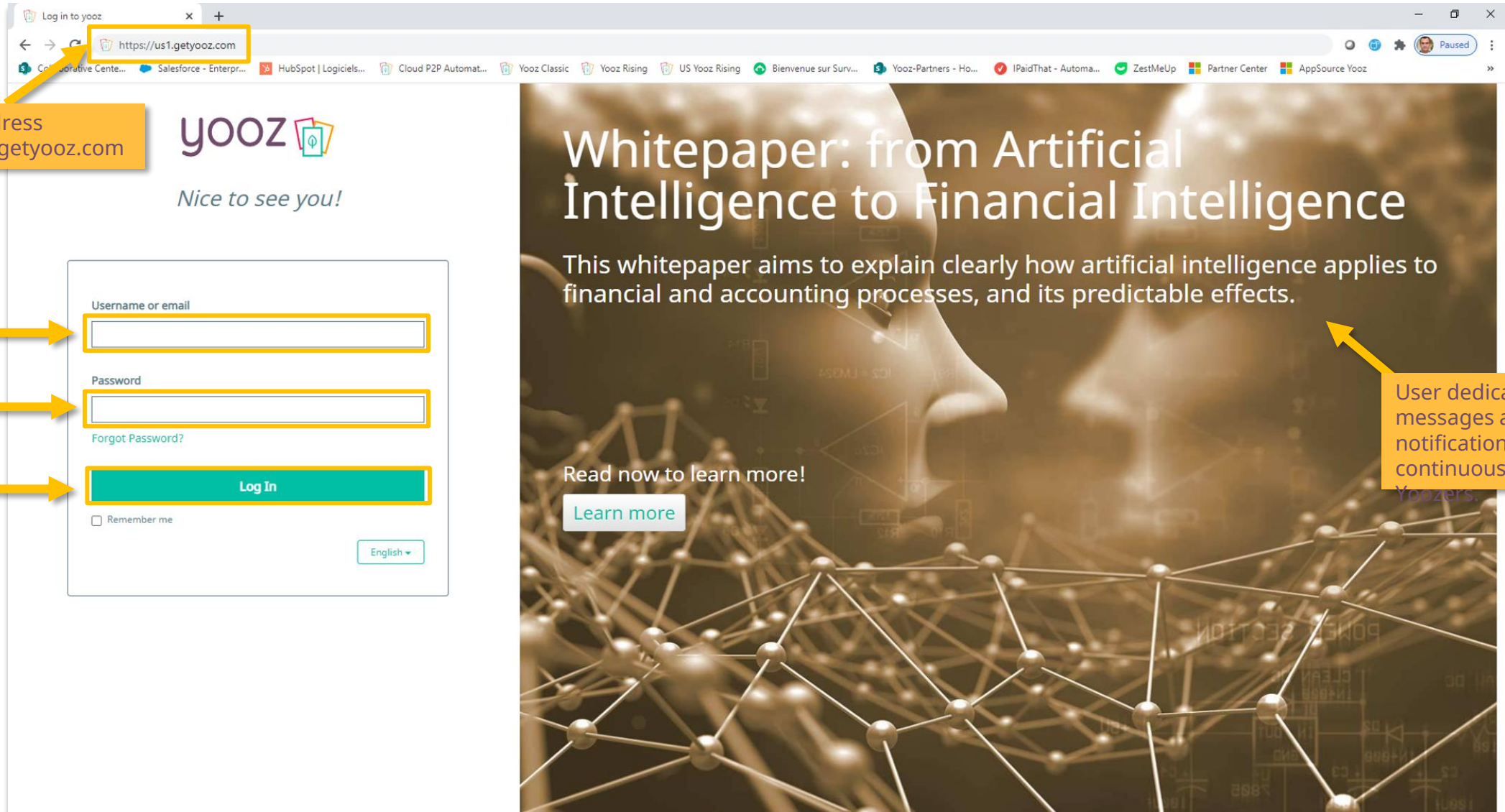
Yooz Automates your AP process



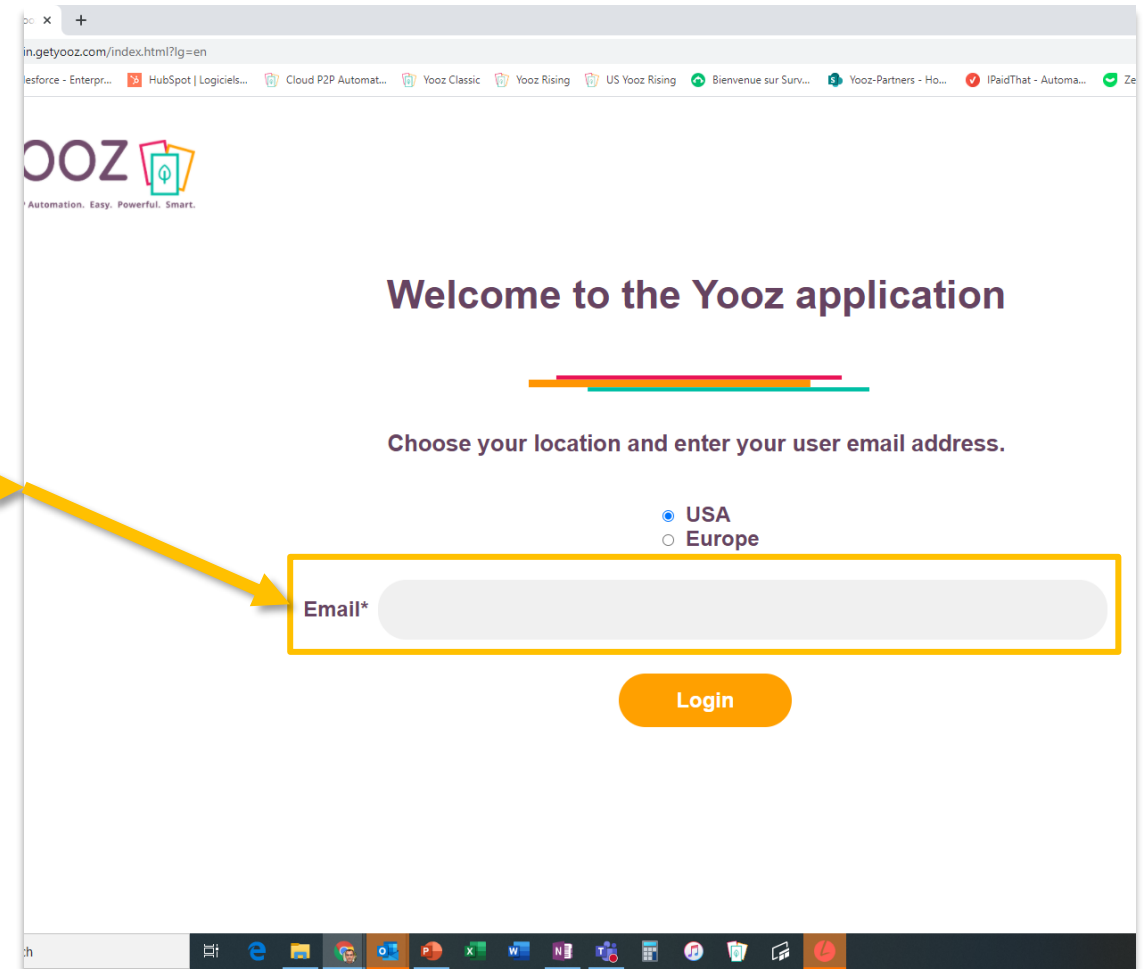
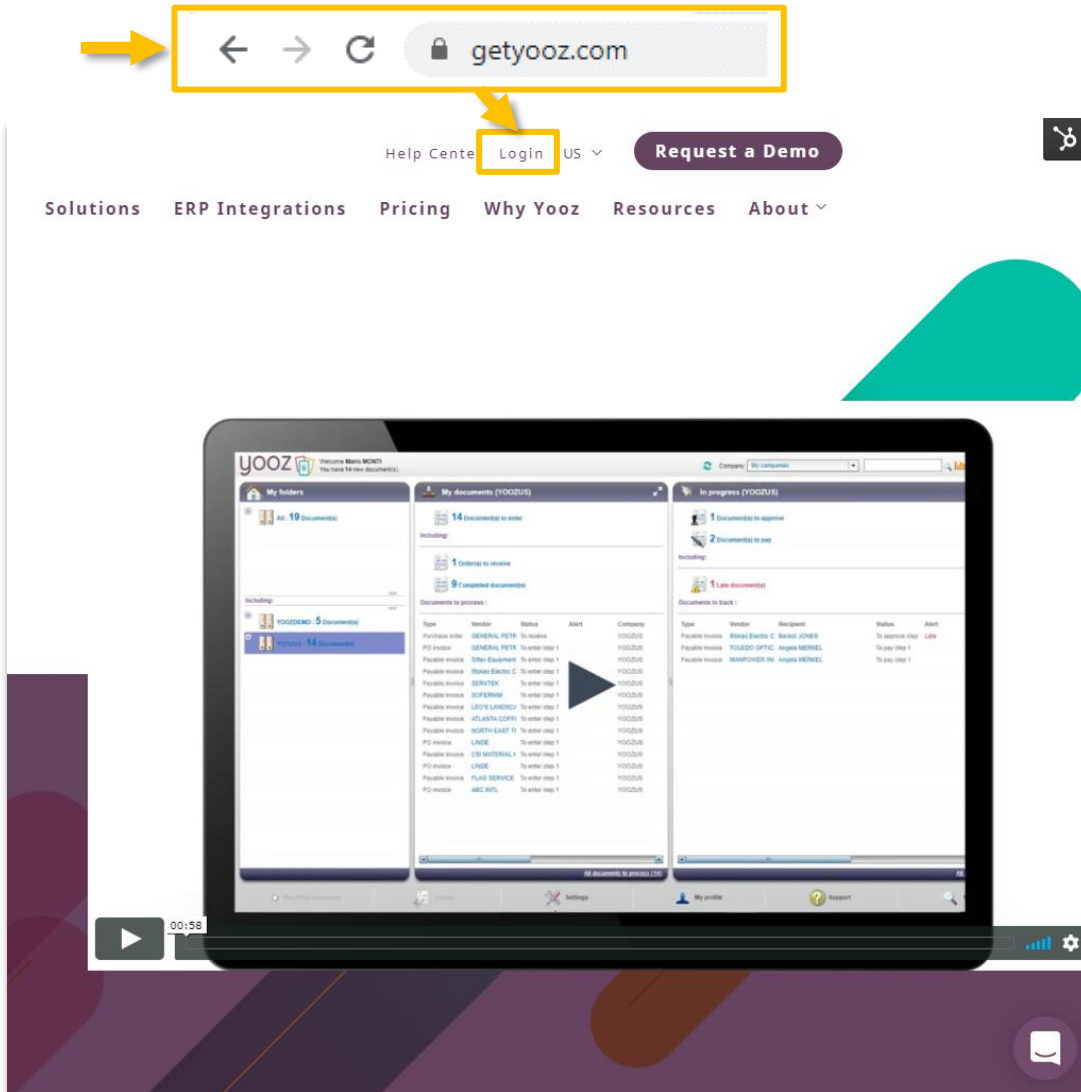
Welcome to Yooz Rising application!

- Yooz is a cloud software
 - Any operating system
 - Any web browser
 - Any computer
- Access is granted by your administrator
- Welcome e-mail sent to all users
- Check your spam folder
- Forgotten password link - Reset it in case of problem: here is our Help Center article to help you:
<https://help.getyooz.com/en/articles/3543190-i-forgot-my-password-how-to-reset-it>
- Password needs to be changed after first login
- Use your web browser password manager

How to access on your laptop



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





Cloud P2P Automation. Easy. Powerful. Smart.

Your User interface

Application : yoozdemorefrising Change application

yooz Capture **My tasks** My exports Statistics Search [Settings] [Notifications 9+] [User: Mario Monti]

My tasks (All my organizational units) Refresh [Menu]

18
Late >

7
Complete >

1
Blocked >

14
In progress >


To do > Open Delete





19 result(s) My tasks: acting as your personal activity dashboard.

Organizational unit	<input type="checkbox"/>	Rank	Name	<input type="checkbox"/>	Completion rate	Third party	Task	Reporting	Document date	Net amount (excl. t...
USA YOOZDEMO 19	<input type="checkbox"/>		Payable invoice 00121812	<input type="checkbox"/>	🟢		Review 1	Late	01/18/2018	79.0
	<input type="checkbox"/>		Payable invoice 1029 (LEO'S LANDSCAPING ...	<input type="checkbox"/>	🟢	LEO'S LANDSCAPIN...	Review 1	Late	02/11/2019	664.0
	<input type="checkbox"/>		Payable invoice 12345	<input type="checkbox"/>	🟢		Review 1	Late	05/15/2019	409.0
	<input type="checkbox"/>		Payable invoice 27340	<input type="checkbox"/>	🟢		Review 1	Late	07/05/2018	6,402.0
	<input type="checkbox"/>		Payable invoice 27340	<input type="checkbox"/>	🟢		Review 1	Late	07/05/2018	6,402.0
	<input type="checkbox"/>		Payable invoice 360026	<input type="checkbox"/>	🟢		Review 1	Late	01/02/2018	60.0
	<input type="checkbox"/>		Payable invoice 43764422 (GENERAL PETRO...	<input type="checkbox"/>	🟢	GENERAL PETROLEU...	Review 1	Late	06/28/2018	541.0
	<input type="checkbox"/>		Payable invoice 5031 (GRAINGER)	<input type="checkbox"/>	🟢	GRAINGER (\$GRAIN...	Review 1	Late	03/01/2019	4,400.0
	<input type="checkbox"/>		Payable invoice 578307 (GENERAL PETROLE...	<input type="checkbox"/>	🟢	GENERAL PETROLEU...	Review 1	Locked, Late	07/05/2018	2,448.0
	<input type="checkbox"/>		Payable invoice 578307 (GENERAL PETROLE...	<input type="checkbox"/>	🟢	GENERAL PETROLEU...	Review 1	Late	07/05/2018	600.0
	<input type="checkbox"/>		Payable invoice 803314	<input type="checkbox"/>	🟢		Review 1	Late	05/05/2019	69.0
	<input type="checkbox"/>		Payable invoice 803314	<input type="checkbox"/>	🟢		Review 1	Late	05/05/2019	69.0
	<input type="checkbox"/>		Payable invoice 803314	<input type="checkbox"/>	🟢		Review 1	Late	01/01/2019	69.0
	<input type="checkbox"/>		Payable invoice FV000593 (SOFERNIM)	<input type="checkbox"/>	🟢	SOFERNIM (\$SOFER...	Review 1	Late	06/02/2019	630.0
	<input type="checkbox"/>		Payable invoice INV12106	<input type="checkbox"/>	🟢		Review 1	Late	01/31/2019	4,025.0
	<input type="checkbox"/>		Payable invoice INV25176007539323	<input type="checkbox"/>	🟢		Review 1	Late	01/31/2019	23.0



Application : yoozdemorefrising Change application

yooz  Capture **My tasks** My exports Statistics

Search     Mario Monti v

My tasks (All my organizational units) ↻ ⋮

















Search bar: where you can Search any document in your platform through keyword-based and criteria-based queries.

Notifications center: where you'll be notified of an information, warning, error message.

14
In progress >

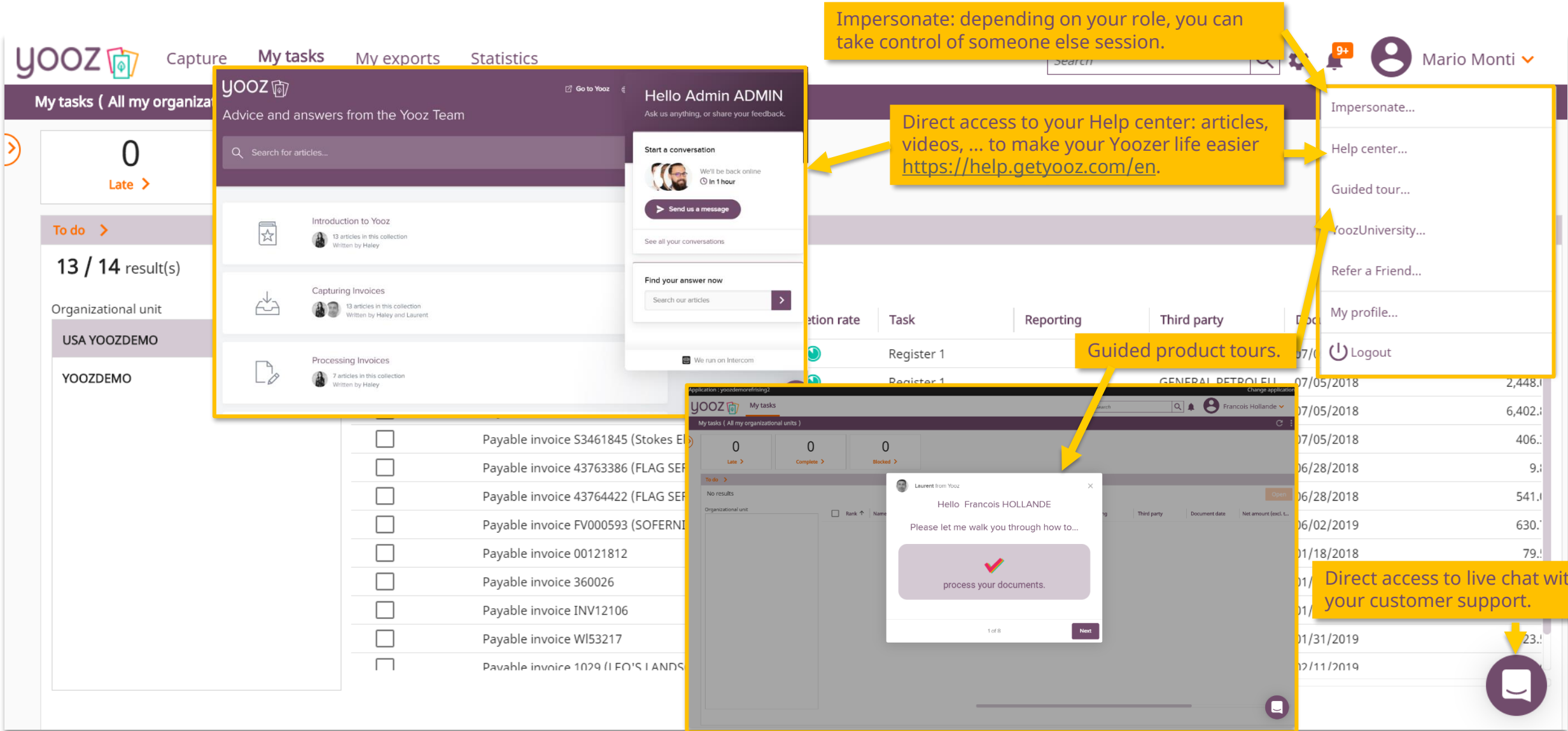
To do >

19 result(s) Open Delete

Organizational unit	<input type="checkbox"/>	Rank	Name	↑	Completion rate	Third party	Task	Reporting	Document date	Net amount (excl. t...
USA YOOZDEMO 19	<input type="checkbox"/>		Payable invoice 00121812				Review 1	Late	01/18/2018	79.0
	<input type="checkbox"/>		Payable invoice 1029 (LEO'S LANDSCAPING ...			LEO'S LANDSCAPIN...	Review 1	Late	02/11/2019	664.0
	<input type="checkbox"/>		Payable invoice 12345				Review 1	Late	05/15/2019	409.0
	<input type="checkbox"/>		Payable invoice 27340				Review 1	Late	07/05/2018	6,402.0
	<input type="checkbox"/>		Payable invoice 27340				Review 1	Late	07/05/2018	6,402.0
	<input type="checkbox"/>		Payable invoice 360026				Review 1	Late	01/02/2018	60.0
	<input type="checkbox"/>		Payable invoice 43764422 (GENERAL PETRO...			GENERAL PETROLEU...	Review 1	Late	06/28/2018	541.0
	<input type="checkbox"/>		Payable invoice 5031 (GRAINGER)			GRAINGER (\$GRAIN...	Review 1		03/01/2019	4,400.0
	<input type="checkbox"/>		Payable invoice 578307 (GENERAL PETROLE...			GENERAL PETROLEU...	Review 1	Locked, Late	07/05/2018	2,448.0
	<input type="checkbox"/>		Payable invoice 578307 (GENERAL PETROLE...			GENERAL PETROLEU...	Review 1	Late	07/05/2018	600.0
	<input type="checkbox"/>		Payable invoice 803314				Review 1	Late	05/05/2019	69.0
	<input type="checkbox"/>		Payable invoice 803314				Review 1	Late	05/05/2019	69.0
	<input type="checkbox"/>		Payable invoice 803314				Review 1	Late	01/01/2019	69.0
	<input type="checkbox"/>		Payable invoice FV000593 (SOFERNIM)			SOFERNIM (\$SOFER...	Review 1	Late	06/02/2019	630.0
	<input type="checkbox"/>		Payable invoice INV12106				Review 1	Late	01/31/2019	4,025.0
	<input type="checkbox"/>		Payable invoice INV25176007539323				Review 1	Late	01/31/2019	23.0

Main screen – Top bar 3/3

My profile - Embedded User assistance tools



The screenshot shows the Yooz main interface with several callouts highlighting user assistance features:

- Impersonate:** depending on your role, you can take control of someone else session. (Callout pointing to the impersonate option in the user menu)
- Direct access to your Help center:** articles, videos, ... to make your Yoozer life easier <https://help.getyooz.com/en>. (Callout pointing to the help center option in the user menu)
- Guided product tours.** (Callout pointing to a guided tour pop-up window)
- Direct access to live chat with your customer support.** (Callout pointing to the chat icon in the bottom right corner)

The main interface includes a top navigation bar with 'Capture', 'My tasks', 'My exports', and 'Statistics'. The user profile 'Mario Monti' is visible in the top right. The 'My tasks' section shows a list of tasks with checkboxes and details like 'Payable invoice S3461845 (Stokes E)'. A search bar for articles is also present.

Navigation: Capture | **My tasks** | My exports | Statistics

Search: [Settings] [Notifications: 3] [User: Mario Monti]

My tasks (All my organizational units)

26
Late >

9
Complete >

2
Blocked >

12
In progress >






To do > 17 / 34 result(s)

Organizational unit	<input type="checkbox"/>	Rank ↑	Name	Completion rate	Task	Reporting	Third parties(Suppl...	Document date	Net amount (excl. t...	Total amount (incl. ...	Currency	Document crea
(?)	<input type="checkbox"/>		1 Payable invoice 2164936	🟢	Review 1	Late		12/21/2018	2,059.63	2,059.63	US Dollar	10/15/2020 9
USA YOOZDEMO	<input type="checkbox"/>		2 (?) 578307	🟢	Registration			05/07/2018	2,448.00	2,448.00	Euro	10/16/2020 11
YOOZDEMO	<input type="checkbox"/>		3 Payable invoice 27340	🟢	Registration			05/07/2018	6,402.81	6,402.81	US Dollar	10/16/2020 11
	<input type="checkbox"/>		4 Payable invoice 27340	🟢	Review 1	Late		05/07/2018	6,402.81	6,402.81	US Dollar	10/16/2020 11
	<input type="checkbox"/>		5 Payable invoice 925037	🟢	Review 1	Late			32.03	32.03	US Dollar	10/16/2020 11
	<input type="checkbox"/>		6 Payable invoice FV000593	🟢	Registration			02/06/2019	630.72	630.72	US Dollar	10/16/2020 11
	<input type="checkbox"/>		7 Payable invoice 360026	🟢	Review 1	Late		02/01/2018	60.30	60.30	US Dollar	10/16/2020 11
	<input type="checkbox"/>		8 Payable invoice 123575	🟢	Review 1	Late		01/02/2019	75.00	75.00	US Dollar	10/16/2020 11
	<input type="checkbox"/>		9 Payable invoice INV12106	🟢	Registration			01/04/2013	4,025.00	4,025.00	US Dollar	10/16/2020 11
	<input type="checkbox"/>		10 Payable invoice INV12106	🟢	Review 1	Late		01/04/2013	4,025.00	4,025.00	US Dollar	10/16/2020 11
	<input type="checkbox"/>		11 Payable invoice INV25176007539323	🟢	Registration			01/31/2019	23.58	23.58	US Dollar	10/16/2020 11
	<input type="checkbox"/>		12 Payable invoice INV25176007539323	🟢	Review 1	Late		01/31/2019	23.58	23.58	US Dollar	10/16/2020 11
	<input type="checkbox"/>		13 Payable invoice 1029	🟢	Review 1	Late		11/02/2019	132.94	132.94	US Dollar	10/16/2020 11
	<input type="checkbox"/>		14 Payable invoice 803314	🟢	Registration			01/01/2019	69.36	69.36	US Dollar	10/16/2020 11
	<input type="checkbox"/>		15 Payable invoice 803314	🟢	Review 1	Late		01/01/2019	69.36	69.36	US Dollar	10/16/2020 11
	<input type="checkbox"/>		16 Payable invoice 803314	🟢	Registration			01/01/2013	69.36	69.36	US Dollar	10/16/2020 11
	<input type="checkbox"/>		17 Payable invoice 803314	🟢	Review 1	Late		01/01/2013	69.36	69.36	US Dollar	10/16/2020 11

Access the features of My profile.

Help center...
 Guided tour...
 YoozUniversity...
 Refer a Friend...
My profile...
 Logout

Application : yoozdemorefrising Change application

yooz  Capture My exports Statistics My tasks Search     Mario Monti ▼

My profile

- My account
- My delegations
- Change my password
- Themes setup
- Workspaces setup
- Parameters

Cancel Create



Properties *


Delegation properties ▼

Name * Periodic Restricted

List of delegates *

Delegation periodicity ▼

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

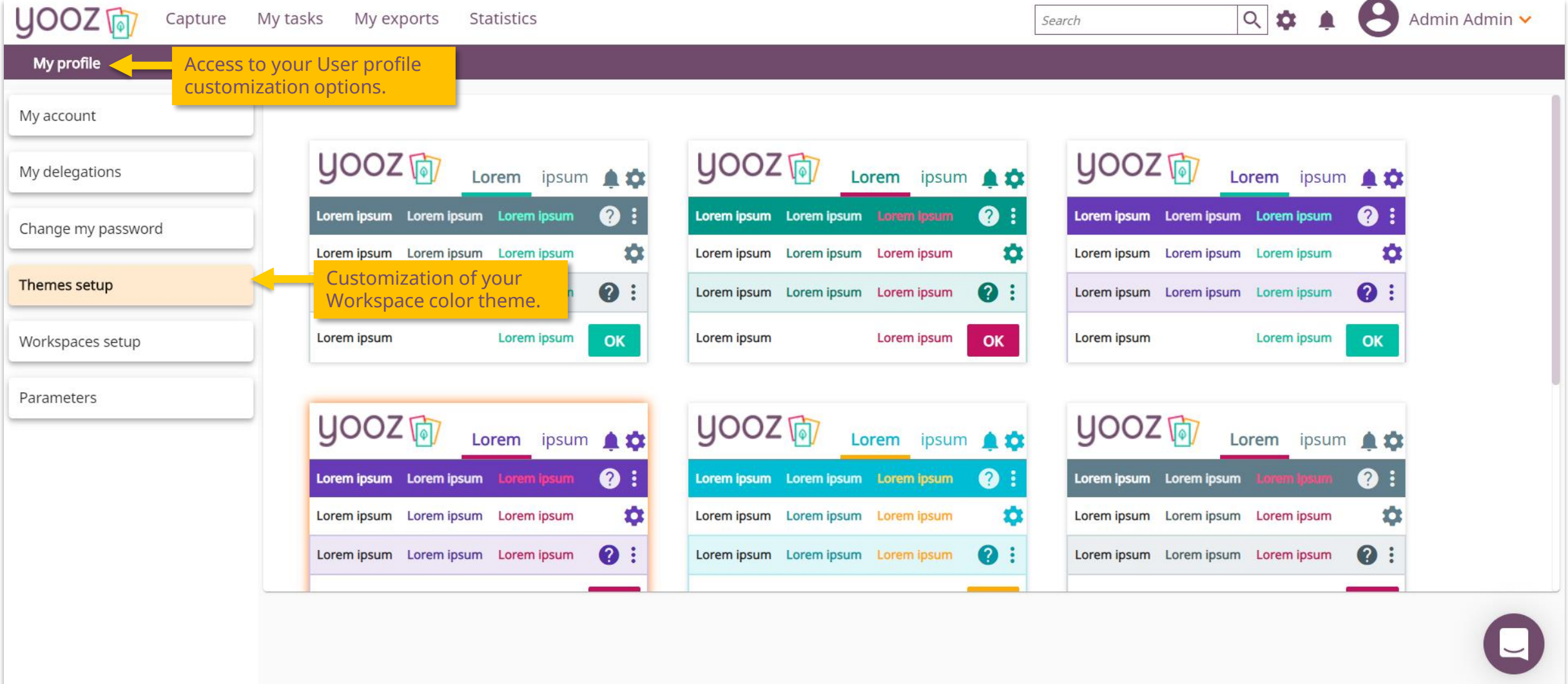
Periodicity  *

Delegate to one or more people, on a defined period of time or on a recurring periodicity.

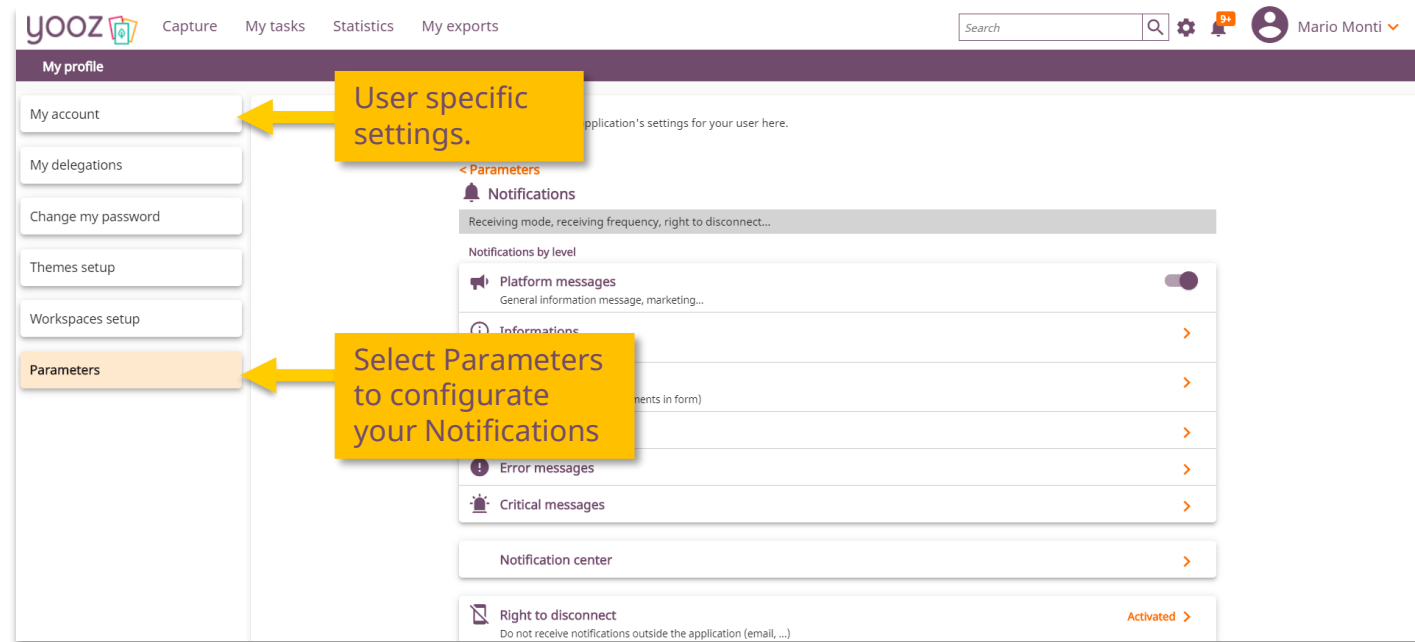
Learn more on delegations and read our Help center article: <https://help.getyooz.com/en/articles/3543417-how-to-create-a-delegation>.

- With Restricted turned off, the User inherits permission and Organizational units so they can fully process all the delegated documents.
- With Restricted turned on, the User needs to already have the permission to process that delegated document.
- For example: With the restriction on, you could delegate to multiple Users who each have one Organizational unit. Thus, having multiple Users able to cover for one User.





The screenshot displays the 'My profile settings' page in the yooz application. 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 left sidebar lists settings: 'My profile', 'My account', 'My delegations', 'Change my password', 'Themes setup', 'Workspaces setup', and 'Parameters'. The 'Themes setup' option is highlighted with a yellow callout: 'Customization of your Workspace color theme.' The main content area shows six preview cards of the workspace interface with different color themes (green, purple, blue, orange, red, grey). A yellow callout points to the 'My profile' link: 'Access to your User profile customization options.'



My profile

My account

My delegations

Change my password

Themes setup

Workspaces setup

Parameters

Search

Mario Monti

< Parameters

Notifications

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

Notifications by level

- Platform messages
- Informations
- Error messages
- Critical messages

Notification center

Right to disconnect



< Parameters < Notifications

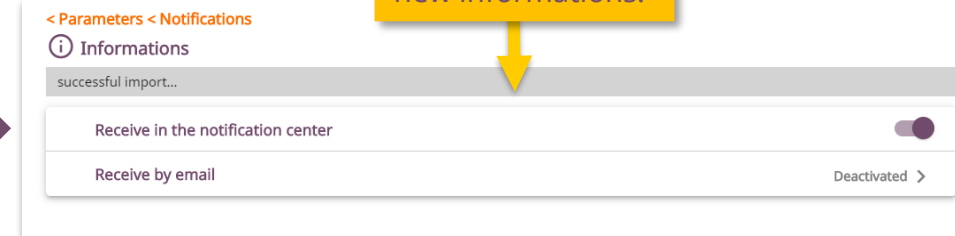
Messages

Discussion thread (ex : comments in form)

Receive in the notification center

Receive by email

Choose how you want to be notified when you have new messages or new informations.



< Parameters < Notifications

Informations

successful import...

Receive in the notification center

Receive by email



Cloud P2P Automation. Easy. Powerful. Smart.

How to Approve a document

2 ways to Access the Document to be Approved:

- You get notified by e-mail: just click on the link,
- You can access Yooz Application, go to My Tasks and select the document(s) to be approved.

Application : yoozdemo31

yooz Capture **My tasks**

My tasks (All my organizational units)

Filter by

Organizational unit

Document type

Third party (vendor, customer...)

Date interval

From To:

[Reset](#)

8 Late >

8 Complete >

0 Blocked >

My KPIs:

- Complete: documents where all fields are complete,
- Blocked: documents blocked by a User for a specific reason,
- In progress: documents being processed,
- Late: documents late to be processed.

Click to drill down.

To do >

8 result(s) [Open](#) [Delete](#)

Organizational unit	Rank	Name	Completion rate	Task	Alert	Third party (vendor,...	Document date	Net amount (excl. t...	Total amount (incl
YZDEMO OTHER	<input type="checkbox"/>								
	<input type="checkbox"/>	1 Payable invoice - no PO 0457427490 (CSI MA...	●	Approval 1	Late	\$CSI - CSI MATERIAL ...	07/06/2018	74.20	
	<input type="checkbox"/>	2 Payable invoice - no PO 43763386 (LINDE)	●	Approval 1	Late	\$LINDE - LINDE	06/28/2018	9.85	
	<input type="checkbox"/>	3 Payable invoice - no PO 43764422 (LINDE)	●	Approval 1	Late	\$LINDE - LINDE	06/28/2018	541.00	
	<input type="checkbox"/>	4 Payable invoice - no PO 00121812 (Siftex Equi...	●	Approval 1	Late	\$SIFTEX - Siftex Equi...	01/18/2018	79.50	
	<input type="checkbox"/>	5 Payable invoice - no PO 360026 (SERVTEK)	●	Approval 1	Late	\$SERVTEK - SERVTEK	01/02/2018	60.30	
	<input type="checkbox"/>	6 Payable invoice - no PO 123575 (NORTH EAS...	●	Approval 1	Late	\$NETS - NORTH EAST...	02/01/2019	75.00	
	<input type="checkbox"/>	7 Payable invoice - no PO 1029 (LEO'S LANDSC...	●	Approval 1	Late	\$LEO - LEO'S LANDS...	02/11/2019	132.94	1
	<input type="checkbox"/>	8 Payable invoice - no PO 803314 (ATLANTA C...	●	Approval 1	Late	\$ATLANTACT - ATLAN...	01/01/2019	69.36	

In progress >

No results

Organizational unit > Document type Third party (ve...

List of selected Organizational units.

List of documents related to the selected Organizational unit:

- Action items aka your « to do » list,
- Items for follow-up: track the status of the documents you have already processed but that are still in someone else's queue.

[Open](#) [Delete](#)

Approve in bulk a group of Invoices

The screenshot shows the Yooz interface with a list of 13 payable invoices. The interface includes a navigation bar with 'My tasks', 'My exports', and 'Statistics'. A search bar and user profile 'Nicolas Runtz' are also visible. The main content area shows a table of invoices with columns for Rank, Name, Completion rate, Task, Document date, Net amount, Total amount, Currency, and Document. A sidebar on the left shows 'Organizational unit' with 'USA YOOZDEMO' selected. Three yellow callouts provide instructions: 1. 'Select your Invoices.' points to the selection checkboxes. 2. 'Process them all.' points to the 'Process automatically' button. 3. 'Your invoices are ready for the next step.' points to the bottom of the list.

Rank	Name	Completion rate	Task	Document date	Net amount (excl. t...)	Total amount (incl. ...)	Currency	Document	
	Payable invoice	●	Review 1	06/12/2019	1,070.00	1,070.00	US Dollar	09/24/2020	
	Payable invoice 00121812	●	Review 1	01/18/2018	79.50	79.50	US Dollar	09/25/2020	
	Payable invoice 12345	●	Review 1	05/15/2019	409.42	409.42	US Dollar	09/24/2020	
	Payable invoice 27340	●	Review 1	07/05/2018	6,402.81	6,402.81	Dollar	09/25/2020	
	Payable invoice 26	●	Review 1	01/02/2018	60.30	60.30	Dollar	09/25/2020	
	Payable invoice 26	●	LAG SERVICE & MA...	Review 1	06/28/2018	9.85	9.85	US Dollar	09/25/2020
	Payable invoice 26	●	LAG SERVICE & MA...	Review 1	06/28/2018	541.00	541.00	US Dollar	09/25/2020
	Payable invoice 5031	●	RAMM FENCING (\$R...	Review 1	03/01/2019	4,400.00	4,400.00	US Dollar	09/25/2020 9
	Payable invoice 803314	●	Review 1	01/01/2019	69.36	69.36	US Dollar	09/25/2020 8	
	Payable invoice FV000593 (SOFERNIM)	●	SOFERNIM (\$SOFER...	Review 1	06/02/2019	630.72	630.72	Euro	09/25/2020 8
	Payable invoice INV12106	●	Review 1	01/31/2019	4,025.00	4,025.00	US Dollar	09/25/2020 8	
	Payable invoice INV25176007539323	●	Review 1	01/31/2019	23.58	23.58	US Dollar	09/25/2020 8	
	Payable invoice 53461845 (Stokes Electric C...	●	Stoke... Com... Review 1	07/05/2018	406.32	406.32	US Dollar	09/25/2020 8	

Application : yoozdemo31

Search

Barack JONES

Validation Payable Invoice, Approval 1 # 4826 Late

Document * Entries [Yooz Standard CSV V1]

Close Approve Send Back... Forward...

Properties

Name * Payable invoice - no PO 0457427490 (CSI MATERIAL HANDLING)

Organizational unit * YZDEMO OTHER Document type * Payable invoice - no PO

Vendors * \$CSI - CSI MATERIAL HAND... AP / AR account * 401000 - Accounts Payable

Payment method Payment Partner Document date * 07/06/2018

Document number * 0457427490 Due Date MM/DD/YYYY

Total amount (incl. tax) * 74.20 Currency * USD - US Dollar

Country

Invoice data

Purchase order

CSI 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 0457427490

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

TERMS: ---NET 10 DAYS---

SALESDOM 024 DATE SHIPPED 06/30/18 VIA OUR TRUCK/SHO Van# 46 PPD. X COL. X

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

Unit #: 313030-22 (WAS T6330)
Make: TOYOTA
Model: 7FBEU15 10
Ser #: 21550
Meter: 1093

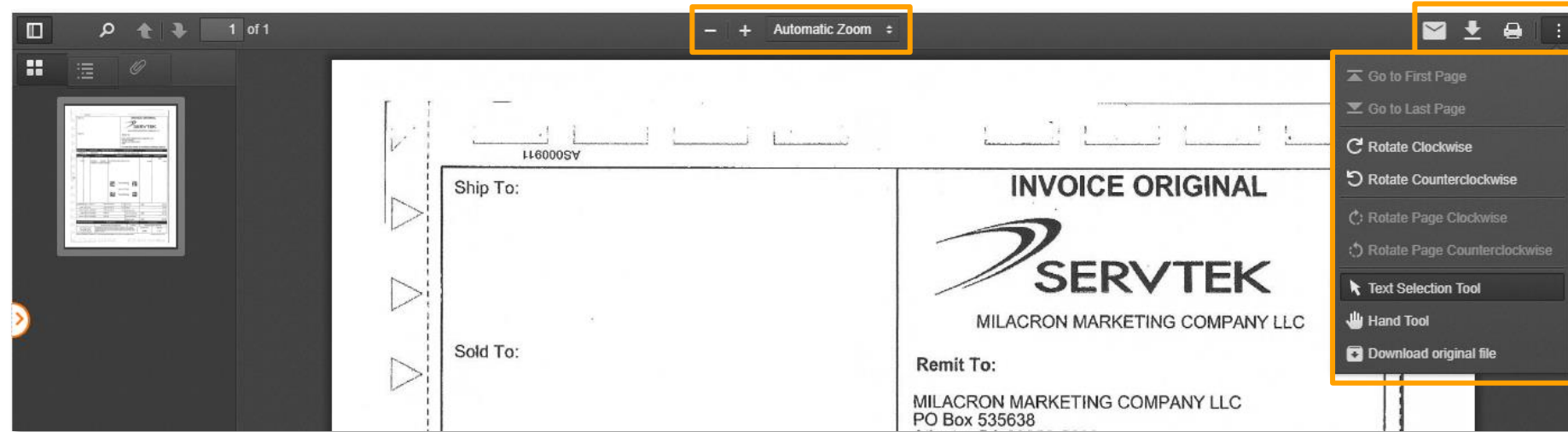
6/30/13 - P.M. SERVICE COMPLETED.

Invoice lines

Account *	Total amount (incl. tax) *	Line description	Division	Product	Project
610002 - OP EXPENSES 2	74.20	\$CSI 0457427490 07/06/2018	US - United States of America	PS - Professional Services	IMP - Client Implementation
	74.20				

■ Image toolbar

- Page selector,
- Print/Download options,
- Email,
- Zoom in or out,
- Rotate, fit image to height or to width,
- Thumbnail panel.



- Use the embedded “To do” button to come back to home screen.
- You can move to the next or previous Invoice if you opened several Invoices

Customize your entry panel layout.

Application: yoozdemo31

UOOZ Capture My tasks

< To do Validation Payable Invoice, Approval 1 (Yooz # 4826) Late

Document * Entries [Yooz Standard CSV V1]

Close Approve Send Back... Forward...

Properties

Name * Payable invoice - no PO 0457427490 [CSI MATERIAL HANDLING]

Organizational unit * YZDEMO OTHER Document type * Payable invoice - no PO

Vendors * \$CSI - CSI MATERIAL HAND... AP / AR account * 401000 - Accounts Payable

Payment method Payment Partner * 07/06/2018 Document date * MM/DD/YYYY

Document number * 0457427490 Due Date

Total amount (incl. tax) * 74.20 Currency * USD - US Dollar

Country

Invoice data

Purchase order

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

REMIT TO:

313030

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

SOLD TO

SHIPPING POINT

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

Invoice lines

Account *	Total amount (incl. tax) *	Line description	Division	Product	Project
+ 610002 - OP EXPENSES 2	74.20	\$CSI 0457427490 07/06/2018	US - United States of America	PS - Professional Services	IMP - Client Implementation



Navigation bar with buttons: < 2/3 > [Block] [Link] [Comment] [Delete] [History]

Action buttons:





- Block this Invoice,
- Link this Invoice to 1 or more documents,
- Attach a Comment,
- Delete this Invoice,
- Display the History.



Cloud P2P Automation. Easy. Powerful. Smart.

How to Search a document

Navigation: Capture | **My tasks** | My exports | Statistics

Search:    

My tasks (All my organizational units)

26
Late >

9
Complete >

2
Blocked >

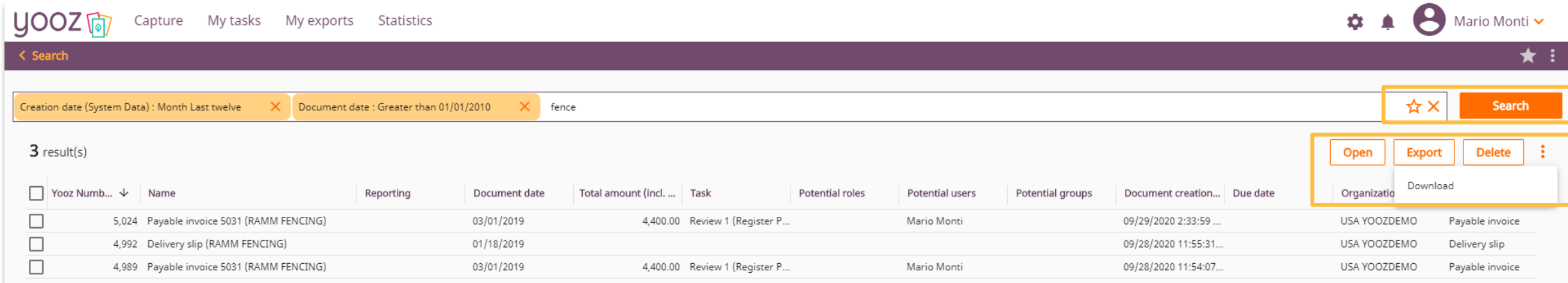
12
In progress >

To do >

17 / 34 result(s) [Open](#) [Delete](#)

Organizational unit	<input type="checkbox"/>	Rank ↑	Name	Completion rate	Task	Reporting	Third parties(Suppl...	Document date	Net amount (excl. t...	Total amount (incl. ...	Currency	Document crea
(?)	<input type="checkbox"/>		1 Payable invoice 2164936		Review 1	Late		12/21/2018	2,059.63	2,059.63	US Dollar	10/15/2020 9
USA YOOZDEMO	<input type="checkbox"/>		2 (?) 578307		Registr							10/16/2020 11
YOOZDEMO	<input type="checkbox"/>		3 Payable invoice 27340		Registr							10/16/2020 11
	<input type="checkbox"/>		4 Payable invoice 27340		Review 1	Late		05/07/2018	6,402.81	6,402.81	US Dollar	10/16/2020 11
	<input type="checkbox"/>		5 Payable invoice 925037		Review 1	Late			32.03	32.03	US Dollar	10/16/2020 11
	<input type="checkbox"/>		6 Payable invoice FV000593		Registration			02/06/2019	630.72	630.72	US Dollar	10/16/2020 11
	<input type="checkbox"/>		7 Payable invoice 360026		Review 1	Late		02/01/2018	60.30	60.30	US Dollar	10/16/2020 11
	<input type="checkbox"/>		8 Payable invoice 123575		Review 1	Late		01/02/2019	75.00	75.00	US Dollar	10/16/2020 11
	<input type="checkbox"/>		9 Payable invoice INV12106		Registration			01/04/2013	4,025.00	4,025.00	US Dollar	10/16/2020 11
	<input type="checkbox"/>		10 Payable invoice INV12106		Review 1	Late		01/04/2013	4,025.00	4,025.00	US Dollar	10/16/2020 11
	<input type="checkbox"/>		11 Payable invoice INV25176007539323		Registration			01/31/2019	23.58	23.58	US Dollar	10/16/2020 11
	<input type="checkbox"/>		12 Payable invoice INV25176007539323		Review 1	Late		01/31/2019	23.58	23.58	US Dollar	10/16/2020 11
	<input type="checkbox"/>		13 Payable invoice 1029		Review 1	Late		11/02/2019	132.94	132.94	US Dollar	10/16/2020 11
	<input type="checkbox"/>		14 Payable invoice 803314		Registration			01/01/2019	69.36	69.36	US Dollar	10/16/2020 11
	<input type="checkbox"/>		15 Payable invoice 803314		Review 1	Late		01/01/2019	69.36	69.36	US Dollar	10/16/2020 11
	<input type="checkbox"/>		16 Payable invoice 803314		Registration			01/01/2013	69.36	69.36	US Dollar	10/16/2020 11
	<input type="checkbox"/>		17 Payable invoice 803314		Review 1	Late		01/01/2013	69.36	69.36	US Dollar	10/16/2020 11

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



Creation date (System Data) : Month Last twelve ✕ Document date : Greater than 01/01/2010 ✕ fence ☆ ✕ Search

3 result(s)

<input type="checkbox"/>	Yooz Numb... ↓	Name	Reporting	Document date	Total amount (incl. ...	Task	Potential roles	Potential users	Potential groups	Document creation...	Due date		
<input type="checkbox"/>	5,024	Payable invoice 5031 (RAMM FENCING)		03/01/2019	4,400.00	Review 1 (Register P...		Mario Monti		09/29/2020 2:33:59 ...		USA YOOZDEMO	Payable invoice
<input type="checkbox"/>	4,992	Delivery slip (RAMM FENCING)		01/18/2019						09/28/2020 11:55:31...		USA YOOZDEMO	Delivery slip
<input type="checkbox"/>	4,989	Payable invoice 5031 (RAMM FENCING)		03/01/2019	4,400.00	Review 1 (Register P...		Mario Monti		09/28/2020 11:54:07...		USA YOOZDEMO	Payable invoice

Open Export Delete ⋮
Organizatio Download

■ Several options

- Search: to run a new Search and access the results immediately in Yooz,
- Open: to Open a document,
- Export: to generate an export file,
- Delete: to Delete one or more documents,
- “Cross”: to clear all the filters currently used in the search
- Download: to Download your search results
 - Several format available, including Excel
 - Possibility to include the accounting details

Application : yoozdemorefrising Change application

yooz Capture My tasks My exports Statistics Mario Monti

< Search ☆ X

Creation date (System Data) : Month Last twelve X Document date : Greater than 01/01/2010 X fence Search

3 result(s) Open Export Delete

<input type="checkbox"/>	Yooz Number	Name	Reporting	Document date	Total amount (incl. ...)	Task	Potential roles	Potential users	Potential groups	Document creation...	Due date	Organizational unit	Document type
<input type="checkbox"/>	5,024	Payable invoice 5031 (RAMM FENCING)		03/01/2019	4,400.00	Review 1 (Register P...		Mario Monti		09/29/2020 2:33:59 ...		USA YOOZDEMO	Payable invoice
<input type="checkbox"/>	4,992	Delivery slip (RAMM FENCING)		01/18/2019						09/28/2020 11:55:31...		USA YOOZDEMO	Delivery slip
<input type="checkbox"/>	4,989	Payable invoice 5031 (RAMM FENCING)		03/01/2019	4,400.00	Review 1 (Register P...		Mario Monti		09/28/2020 11:54:07...		USA YOOZDEMO	Payable invoice

[Show details panel](#)

- Sort by clicking on a column header or use the filters just above.

- Click on the arrow on any Invoice line to view the document and their line item details.

yooz Capture My tasks My exports Statistics Mario Monti

< Search ☆ X

Creation date (System Data) : Month Last twelve X Document date : Greater than 01/01/2010 X fence Search

3 result(s) Open Export Delete

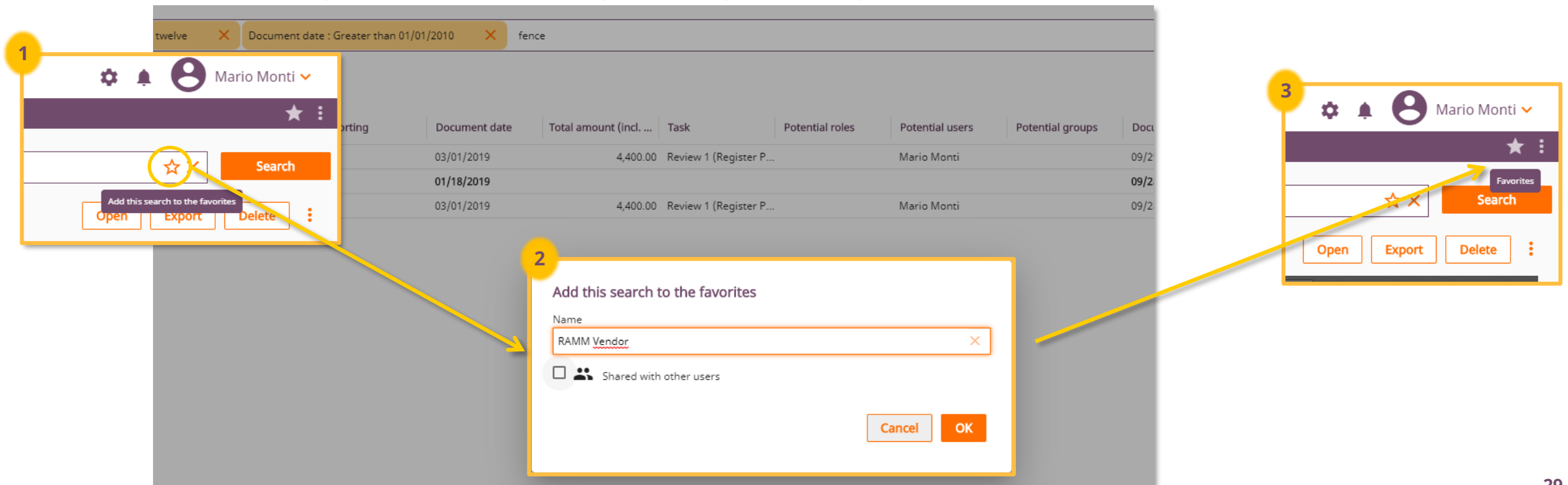
<input type="checkbox"/>	Yooz Number	Name	Reporting	Document date	Total amount (incl. ...)	Task	Potential roles	Potential users	Potential groups	Document creation...	Due date	Organizational unit	Document type
<input type="checkbox"/>	5,024	Payable invoice 5031 (RAMM FENCING)		03/01/2019	4,400.00	Review 1 (Register P...		Mario Monti		09/29/2020 2:33:59 ...		USA YOOZDEMO	Payable invoice
<input type="checkbox"/>	4,992	Delivery slip (RAMM FENCING)		01/18/2019						09/28/2020 11:55:31...		USA YOOZDEMO	Delivery slip
<input type="checkbox"/>	4,989	Payable invoice 5031 (RAMM FENCING)		03/01/2019	4,400.00	Review 1 (Register P...		Mario Monti		09/28/2020 11:54:07...		USA YOOZDEMO	Payable invoice

Properties Linked documents

Name * Organizational unit * Document type *

Delivery slip (RAMM FENCING) YOOZUS - USA YOOZDEMO Delivery slip

- Click on « Star » to add your Search to the favorites.
- Name your favorite Search and share it or not with others.
- You can access to your favorites anytime by clicking on the star.



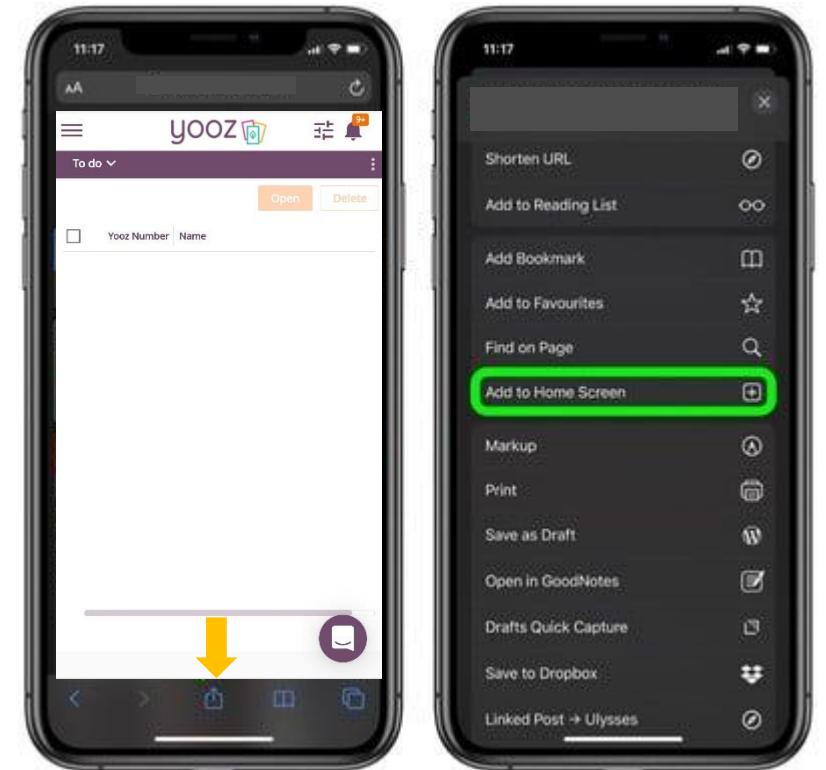
The screenshot illustrates the process of adding a search to favorites in three steps:

- Step 1:** A search card is displayed. A yellow circle highlights the star icon in the top right corner of the card. A tooltip above the star says "Add this search to the favorites".
- Step 2:** A dialog box titled "Add this search to the favorites" is shown. It contains a text input field with "RAMM Vendor" entered, a checkbox labeled "Shared with other users" which is checked, and "Cancel" and "OK" buttons at the bottom.
- Step 3:** The search card is shown again, but now a "Favorites" label is positioned above the star icon, indicating the search has been successfully added to the favorites list.

How to create a home screen icon of Yooz on your smartphone

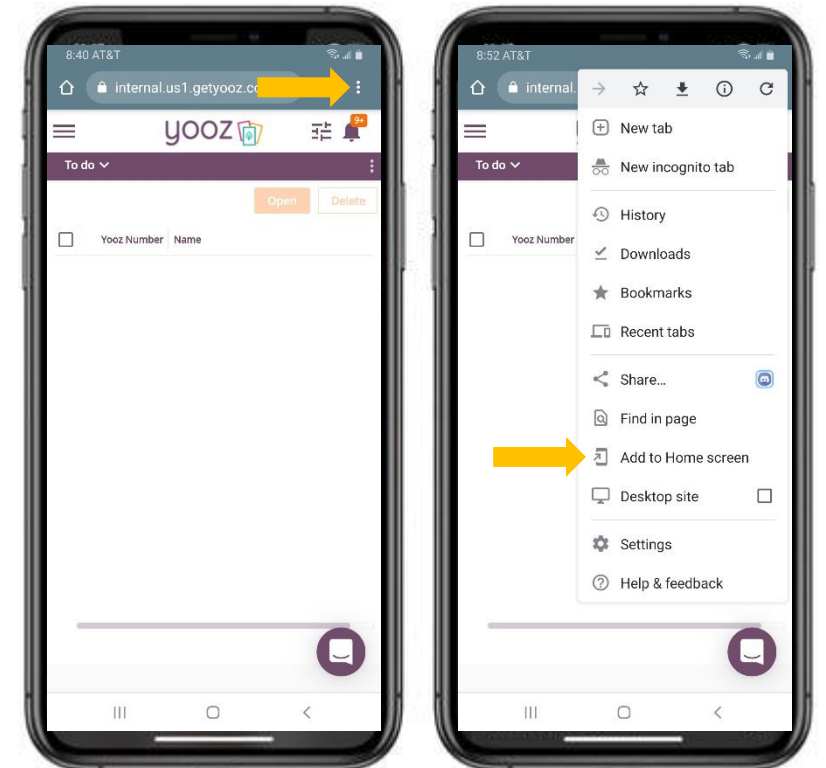
Create a home screen icon (iPhone)

- Launch **Safari** on your iPhone or iPad.
- Navigate to the site (<https://us1.getyooz.com>) that you want to create a Home screen shortcut to.
- Tap the **Share** icon (the square with an arrow pointing out of it) at the bottom of the screen.
- Scroll down to the list of actions and tap **Add to Home Screen**. (If you don't see the action, scroll to the bottom and tap **Edit Actions**, then tap **Add** next to the **Add to Home Screen** action. After that, you'll be able to select it from the Share Sheet.)
- Type a name for your site link. This will be the title that appears beneath its icon on your Home screen.



Create a home screen icon (Chrome)

- Launch “Chrome” app.
- Open the website or web page you want to pin to your home screen (<https://us1.getyooz.com>).
- Tap the menu icon (3 dots in upper right-hand corner) and tap Add to home screen.
- You’ll be able to enter a name for the shortcut and then Chrome will add it to your home screen.

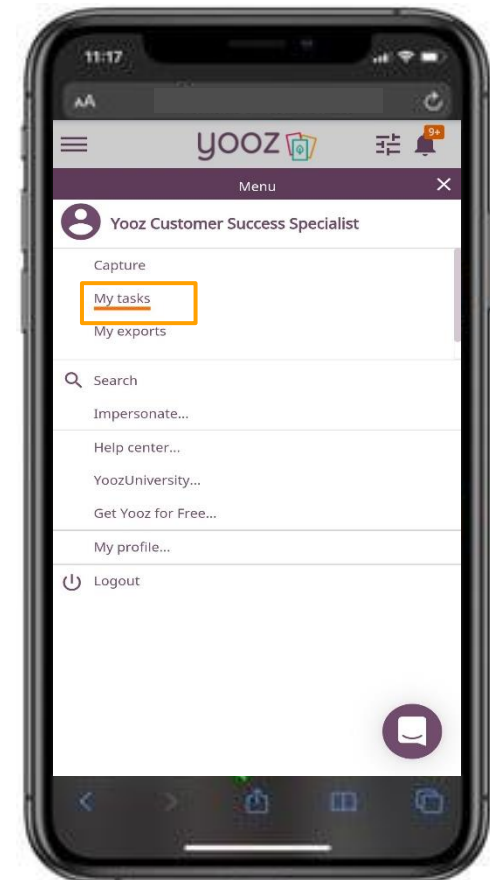
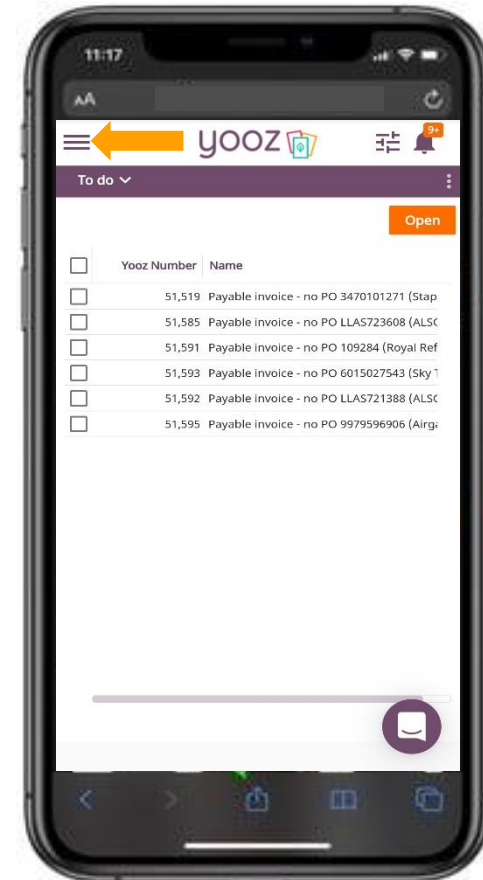




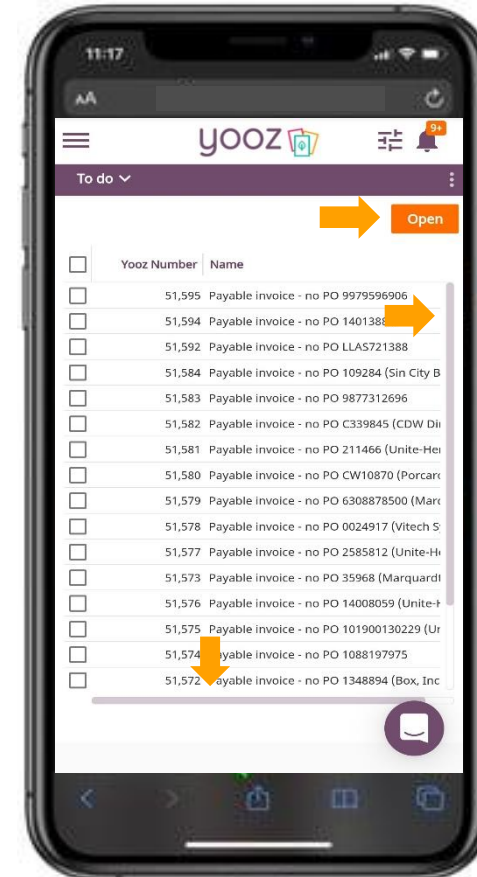
Cloud P2P Automation. Easy. Powerful. Smart.

How to navigate the Yooz Rising interface on your smartphone

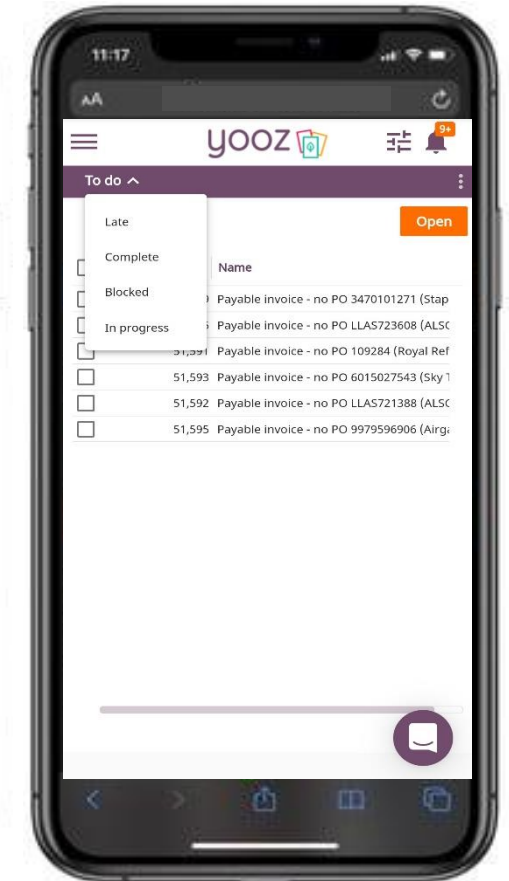
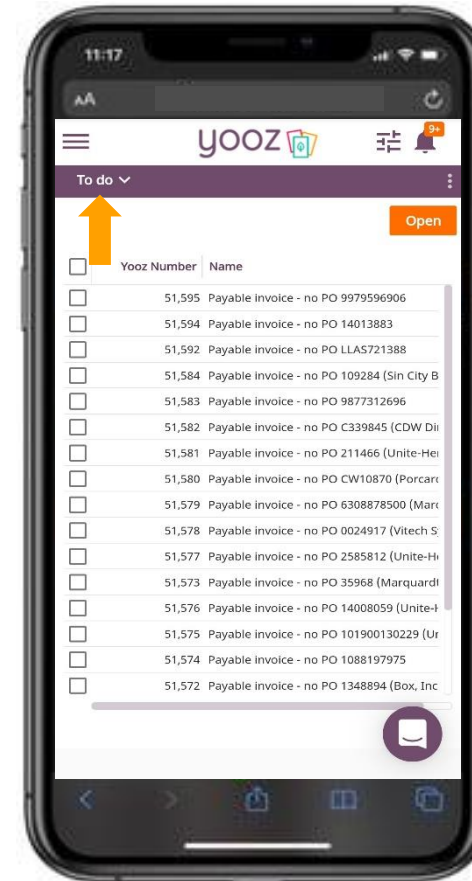
- Click the three horizontal lines in the top left corner to access the Main Menu.
- Click on My Tasks to access your queue in the Yooz application.



- To scroll through the documents in the My Tasks queue:
 - Click & Drag the slider bars to scroll up/down or left/right.
- To open an invoice:
 - Click on the line containing the invoice you want to open,
 - Alternatively, you can click Open in the top right-hand corner of the invoice list to open the entire queue.

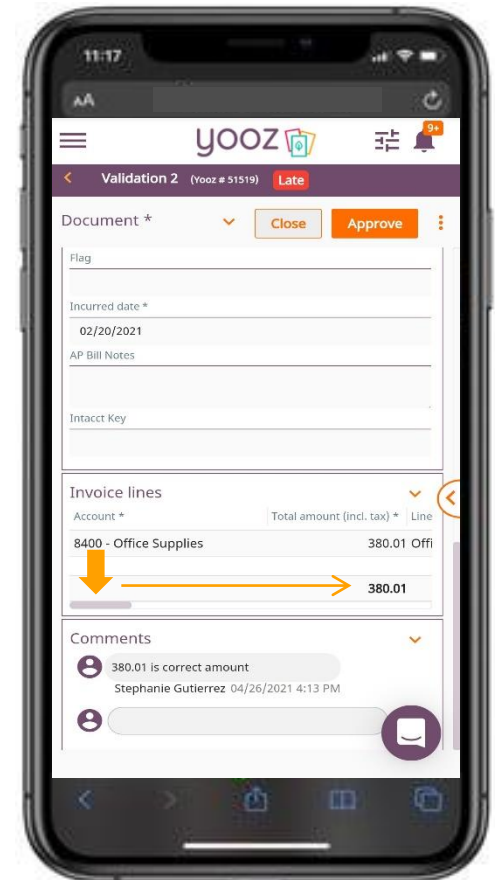
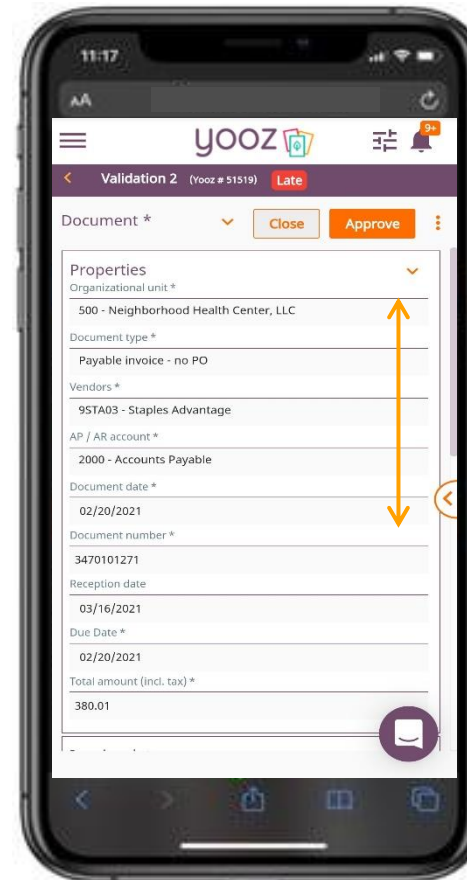


- To access the Late or In Progress components use the Component drop-down (Top Left)
 - To Do Component – Documents in the user’s queue for processing
 - Shows all documents in a user’s queue
 - Late Component – Documents in the user’s queue that are late for processing
 - Only shows documents marked as late
 - In Progress Component – Documents that a user has processed to a new task (step) in the application



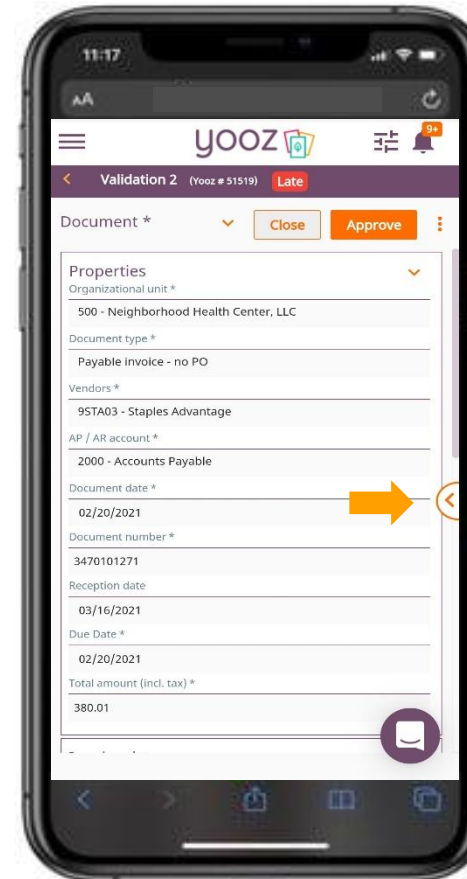
Navigate the Invoice Review Form (1/2)

- Press and drag on the invoice form to scroll up and down.
- Press and drag the slider bar below the invoice lines to scroll left/right.



Navigate the Invoice Review Form (2/2)

- Press the Arrow (Middle Right) or swipe to the left to view the document image
- Press the Arrow again (Middle Left) or swipe to the right to return to the invoice data

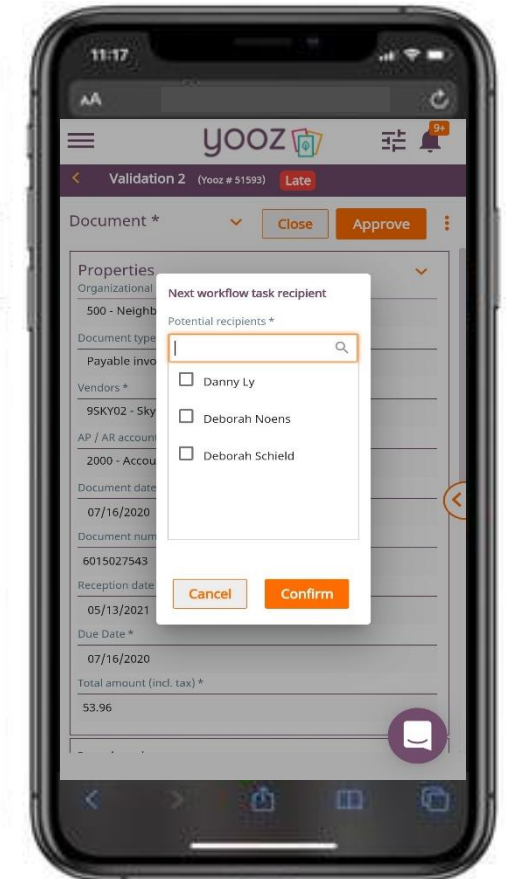
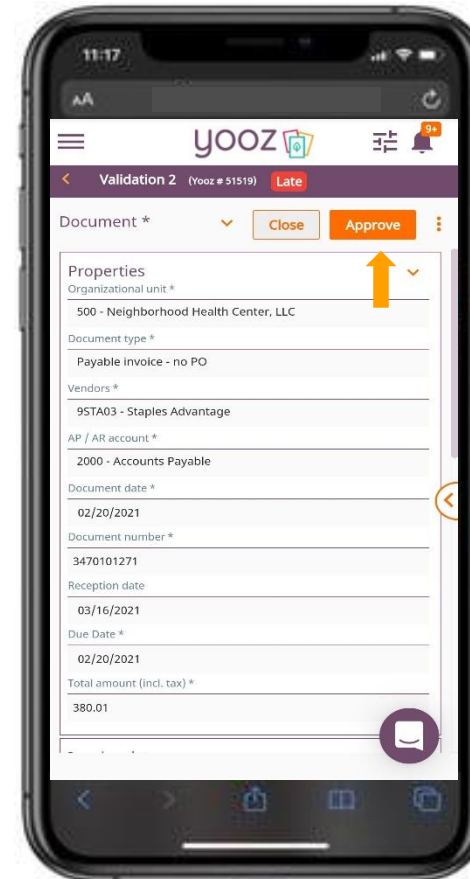




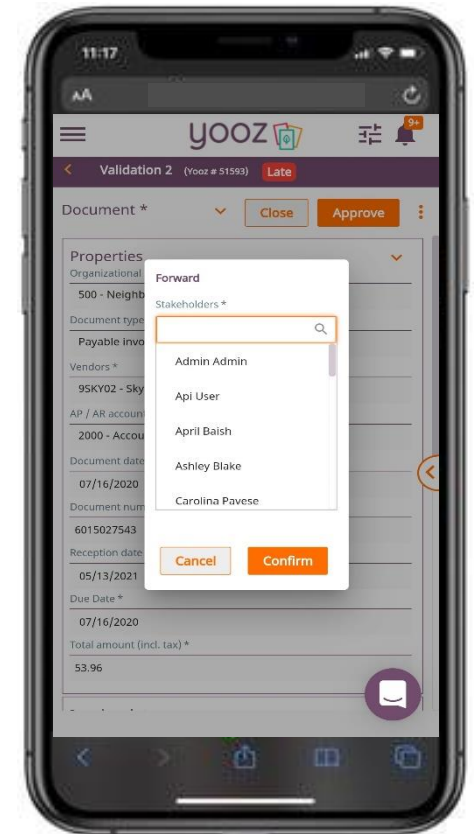
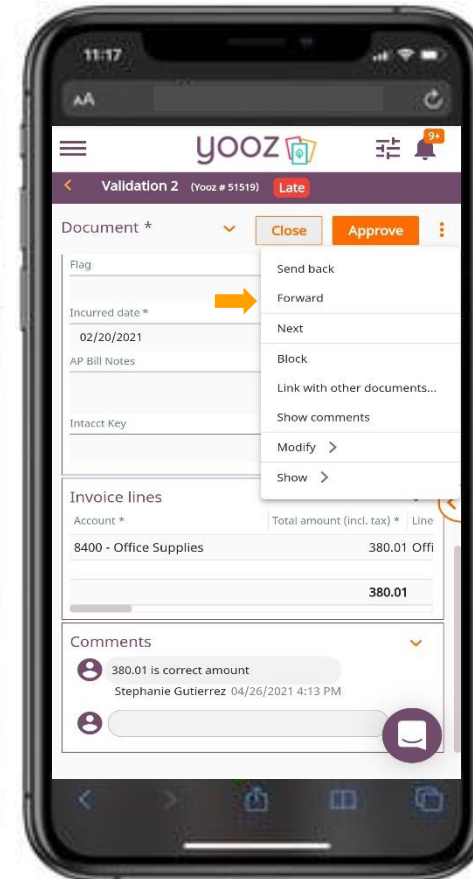
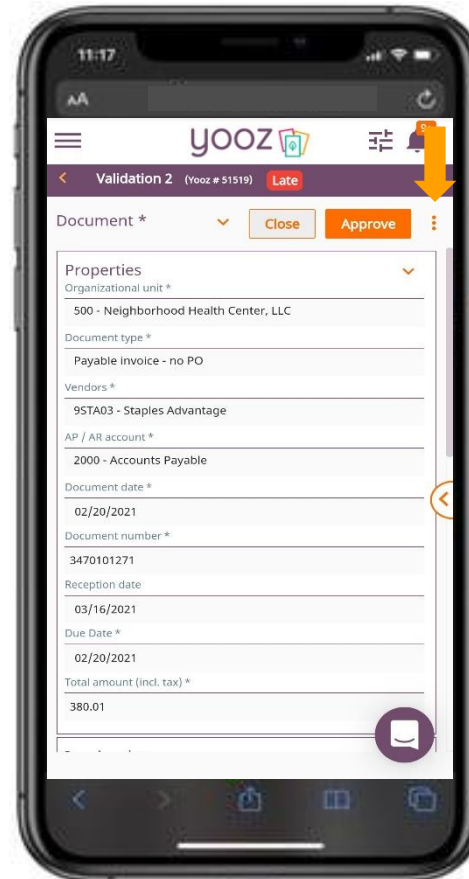
Cloud P2P Automation. Easy. Powerful. Smart.

How to Approve, Reject, & Forward on your smartphone

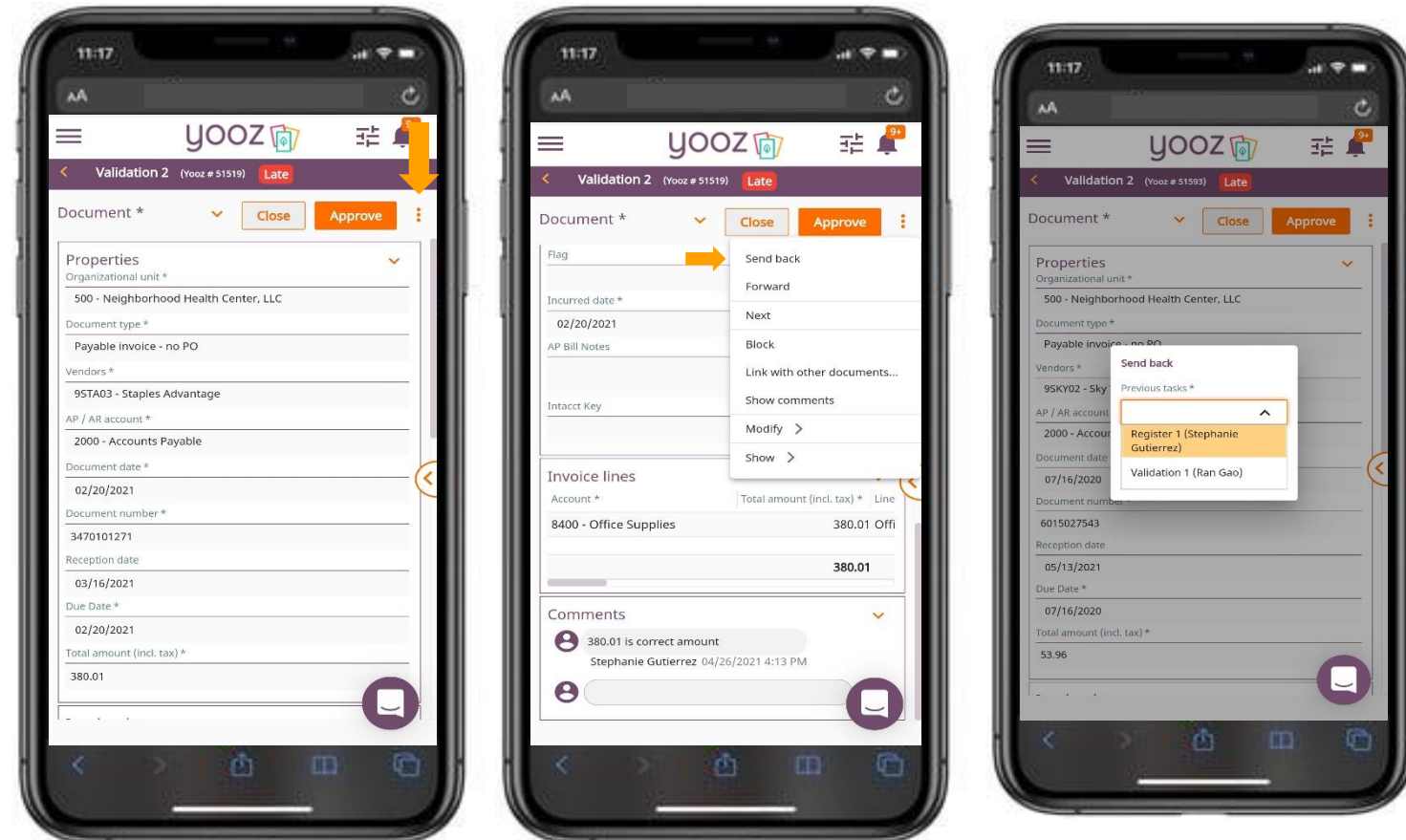
- Press the Approve button to Approve an invoice.
- For each scenario:
 - If there is only one available approver, press Confirm.
 - Otherwise:
 - Select the individual to send the document to in the next Task (step),
 - Then press Confirm.



- Press the vertical three dots to open the action menu (Top Right),
- Press Forward,
- Select the individual you would like to Forward the document to,
- Click Confirm.



- Press the vertical three dots to open the action menu (Top Right),
- Press Send Back,
- Select the Task/individual you would like to Reject (Send Back) the document to,
- Click Confirm.



Questions / Answers