GROWTEQ

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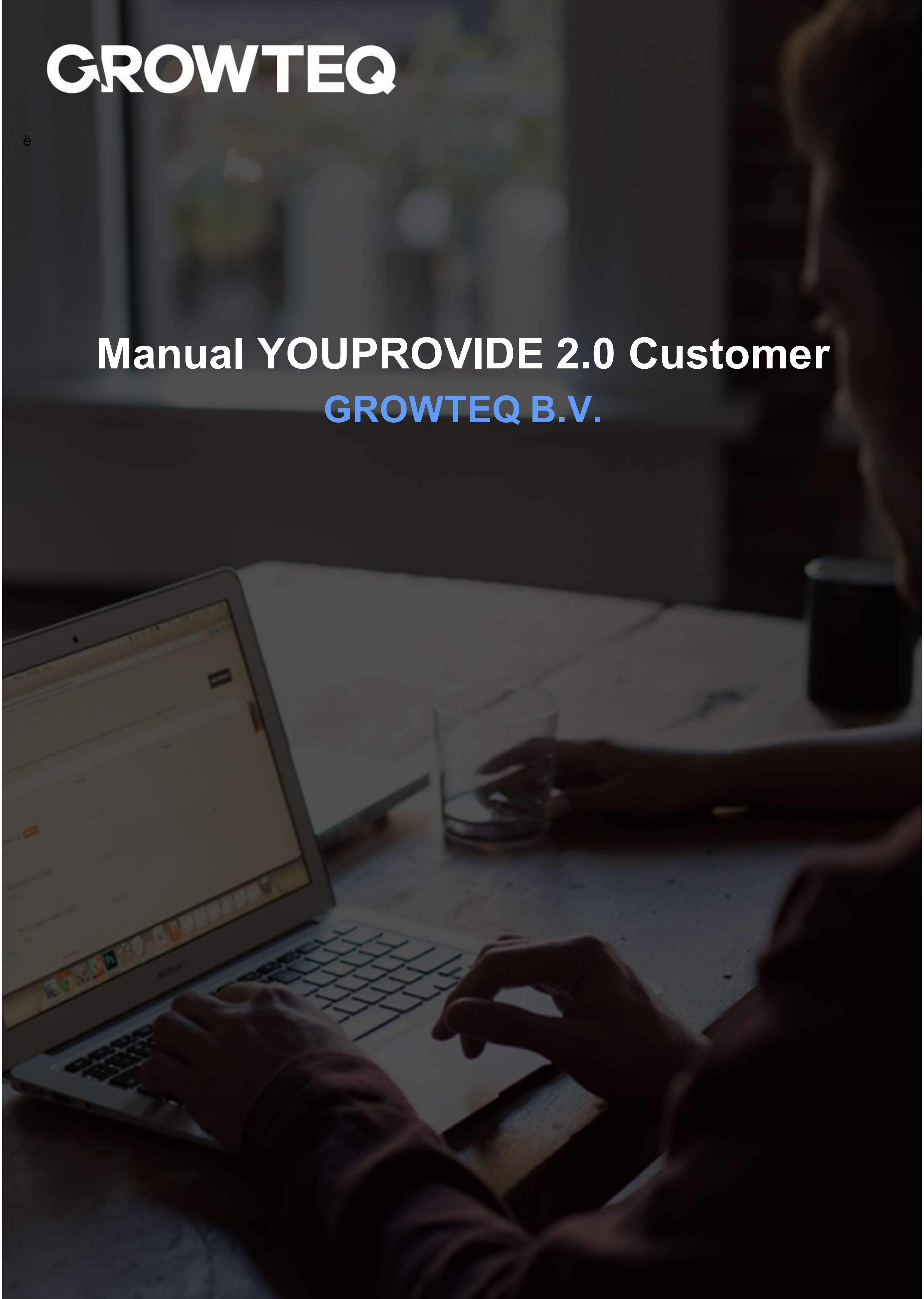
Manual YOUPROVIDE 2.0 Customer

GROWTEQ B.V.



Index

Index *1*

1. Introduction *2*

2. How does YouProvide work for you as a customer? *3*

3. Working with YouProvide *4*

3.1. Overview page 4

3.2. List group 4

3.3. Template files 4

3.4. Upload files 4

3.5. Delete wrong files 5

3.6. Download files 5

3.7. Delivery of item 6

3.8. Comments 6

3.9. Communication profile 6

3.10. Export list 6

3.11. Invite team member 7

3.12. Dashboards 8

4. Confidential items (Advanced) *9*

4.1. Working with confidential items (walk through) 10

4.2. Access structure 13

1. Introduction

Your accounting firm uses YouProvide to deliver documents. YouProvide offers the solution to deliver documents and files to your accountant in a structured way. It prevents unsafe data transfer and offers an answer to long and unstructured customer communication.

The main reasons why your accountant chose YouProvide are:

- **Use templates:** this gives you clear insight into the required documents and enables you to deliver to your accountant in time.
- **Easy transfer:** YouProvide has been designed in such a way that you can deliver your documents in one go and extremely secure without having to log in.
- **Secure storage:** highly encrypted shipping and temporary storage. YouProvide is fully compliant with the AVG legislation.
- **Insight into progress:** Status of the deliveries can be tracked by your accountant and this can help you with questions about the delivery of documents.

For a detailed explanation of all aspects of the security of YouProvide, we refer you to the document '*YouProvide, the security aspects'*.

2. How does YouProvide work for you as a customer?

After your accountant has determined the required documents, you will receive an email from them with several links. If you have been approached for the first time for a list, you will also see an **Activate account** link to activate your account, this must be done before you can start viewing and submitting the lists.

YOU PROVIDE

Dear relation,

You hereby receive from us the link to the location where you can deliver the asked documents. At this location you will find an overview of the group and behind this the list per entity

Below you will find also an overview of the lists per entity.

- Demo

Thanks in advance for your cooperation.

Yours sincerely,
DemoTeam Youprovide

If you have any questions or uncertainties with registering with YouProvide, you can view this document or visit our website.

Figure 1 Example e-mail

The files supplied by you are sent via an encrypted SSL connection. This means that all data sent cannot be collected 'en route'. In addition, all sent data is stored with file names from which it is not possible to trace what the content and who the owner is. Only your own accountant can download and view these files.

3. Working with YouProvide

3.1. Overview page

If you are logged in to YouProvide, you will immediately see an overview of all the list(s) that have been assigned to you by your accountant. If you click on the title of the desired list, you open the list itself.

3.2. List group

If you open the list, as described in chapter 2.1, it is possible that you will see different titles of entities for which documents must be supplied. This depends on whether your company has entities and whether those sub-lists are shared with you.

3.3. Template files

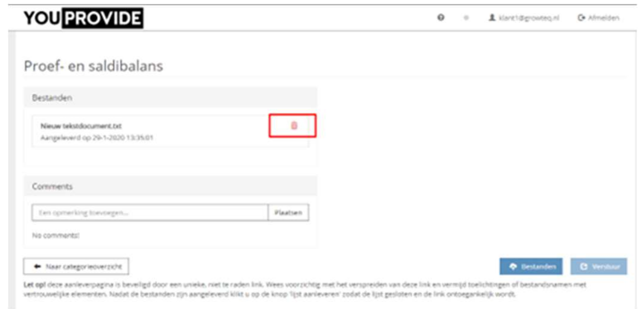
It may be that your accountant provides an example file to demonstrate the requirements that the documents to be delivered must meet. This can be downloaded by pressing the indicated button. This gives you all templates per category. If you do not want to download it all at once, you can download it per item. This is possible by clicking on the desired category and then clicking on the red button. If it is not there, no template is available

3.4. Upload files

With the blue button (circled in red), you can upload files. If you click on it, you will get a new window where you can select file(s) or use the drag & drop function to upload files. You can also provide an explanation if necessary. When you have done that, click on Submit to send the files definitively.

3.5. Delete wrong files

It is possible that you make a mistake uploading documents. You can delete this until the accountant has downloaded the file. You can delete by clicking on the relevant item and then clicking on the recycle bin.



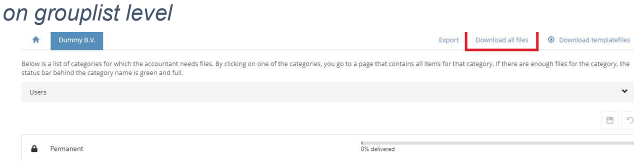
3.6. Download files

(Customer Admin role only)

Files can be downloaded on a listgroup level

Download all files on grouplist level

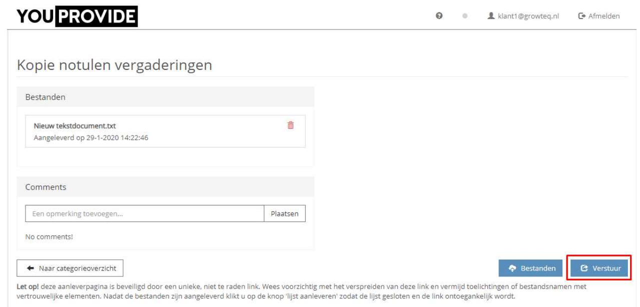
Or on a list level



Download all files on list level

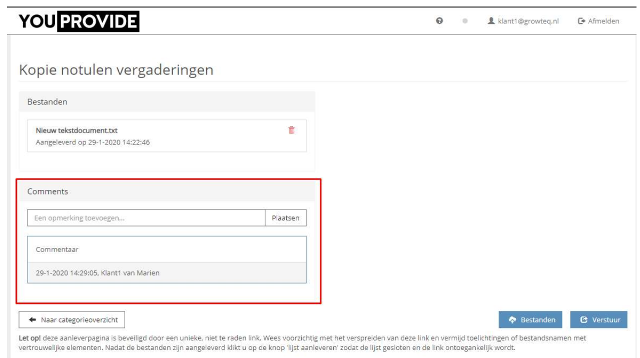
3.7. Delivery of item

Once you have uploaded all the requested documents, you can definitively deliver the relevant items. You can do this by clicking on the item and clicking Send. The account that is processing the request will be notified that the item has been delivered.



3.8. Comments

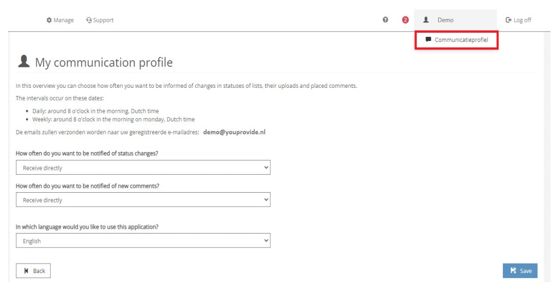
It is possible for you as a customer to comment on an item. The comment you post can be read by the accountant, who will also be informed of this. Conversely, if the accountant makes comments, you can also receive notifications. This is discussed in chapter 2.8. You can also see who has posted a comment and when.



3.9. Communication profile

Communication profile can be created with this function. This allows you to set language setting of the application an when you want to receive notifications of status changes and whether comments have been posted to an item.

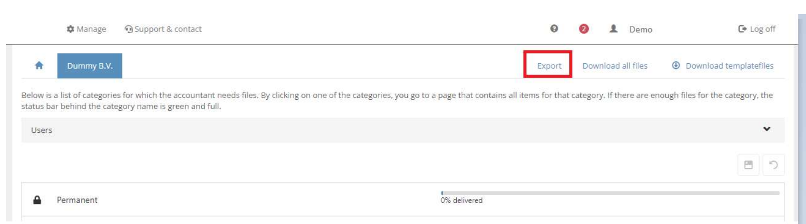
Both language as frequency can be adjusted by clicking on the drop-down menu. If the settings are correct, click on Save. The profile is then set. Any adjustments can also be made later.



3.10. Export list

(Customer admin role only)

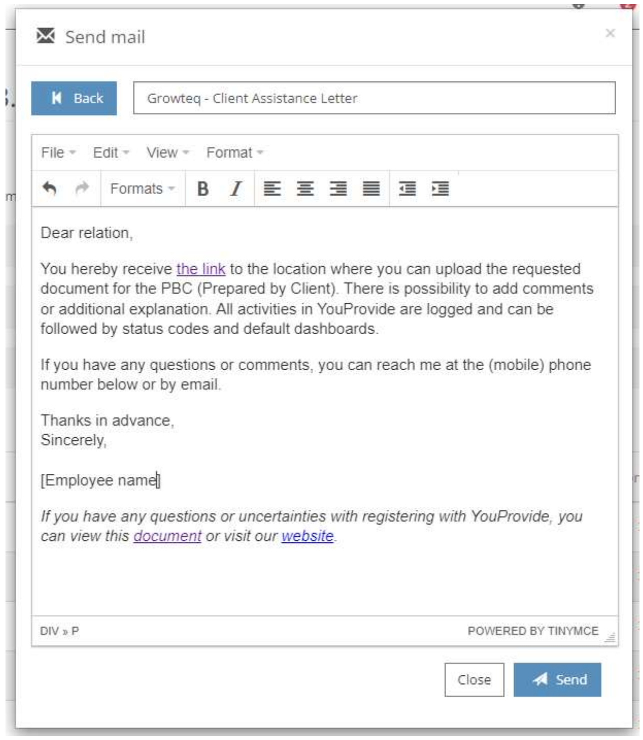
The PBC lists can now also be downloaded in an Excel format using the "Export" option.



This option is only available for the user with the Customer Admin role and on list level.

3.11. Invite team member

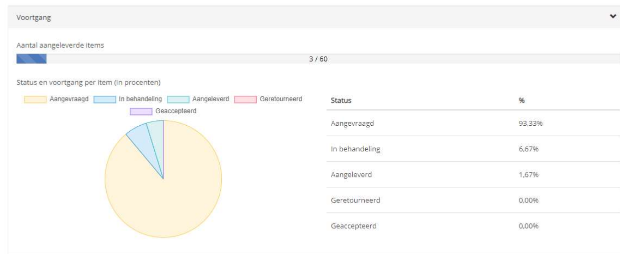
With this function you can add a colleague to the list. Your colleague will receive an email to activate his account and also a link with the shared list. Note: your colleague can only open the list if he has activated the account and is logged in. If your colleague already has an account, he can immediately open the list link that is in the email.



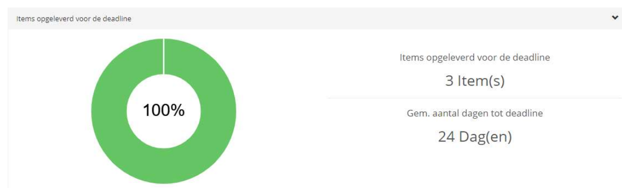
3.12. Dashboards

You can find the dashboard on the page of the customer list. The dashboards are folded when you visit this page. You can expand them by clicking on the arrow on the right.

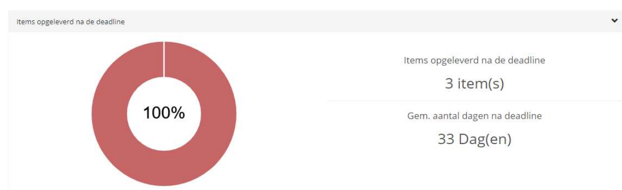
Dashboard progress.
Here you get an overview of the progress of all sub-lists in this list.



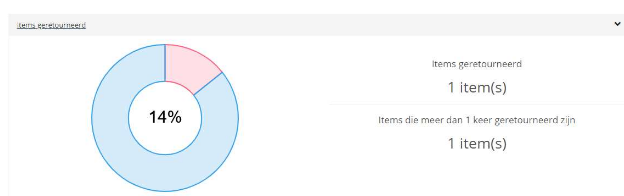
Dashboard "Items delivered before the deadline".
Here you have an overview of the number of files that were submitted before the deadline. With the average time for the deadline.



Dashboard "Items delivered after the deadline".
Here you have an overview with the number of files that were submitted after the deadline. With the average time after deadline.



Dashboard “Items returned”.
Here you get an overview of whether there are items that have been returned one or more times.



4. Confidential items (Advanced)

An important feature in the advanced lists is the recently developed possibility to mark items as “Confidential items”. In this part we will cover the functionality and will provide a “walk through”.

Background
Some documents are preferably not accessible by every employee. For these cases Confidential items can be used. To be able to use this feature, you should work with an Advanced list.

Management
Management of the confidential items, including providing employee access, is exclusively for the user who has the role of CustomerAdmin. (*ongoing we shall refer to this role as “CustomerAdmin”)*.

Mark sections as confidential
The CustomerAdmin marks the sections/category or specific items within sections as confidential. It is possible to mark a complete section/category with one click, or mark only certain items within that section/category.

Providing access to confidential items
The CustomerAdmin controls which user has access to the confidential items. By default a newly added user to the list will **not** have access to the confidential items, until these rights are added by the CustomerAdmin.

When access to confidential items is provided, this applies to ALL confidential items and/or sections/categories of that (group)list.

Be aware! Once access to secured items is applied to a user, this user can access **all** confidential items of that specific (group) list, depending on which level there rights have been granted.

There is no further subdivision possible. *(see access structure for suggestions)*

4.1. Working with confidential items (walk through)

We assume in this example that an Advanced list has been send and we have the role of CustomerAdmin to our account. (since all management regarding confidential items is only accessible with this role).

1) Mark section / category or item as confidential

Mark a section/category as confidential:
The CustomerAdmin is able to mark the section/category as confidential by clicking in the front of the line until a check symbol is available in the box. Untill changes have been saved a green box will be visible, marking the changes.

After saving the changes a lock symbol will appear.

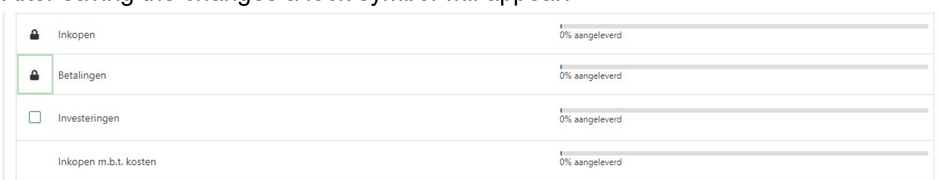
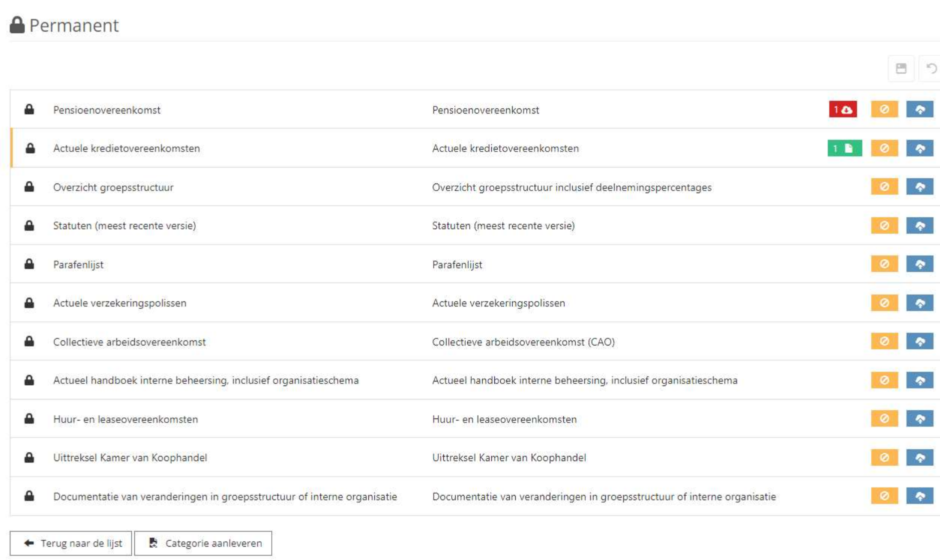


Figure 1 Marking a section/category as confidential while having unsaved changes.

When you open a category that is marked with a lock all items within this section/category are marked as confidential (a lock is visible in front of each line).



Note: It is possible to undo the lock on a certain item within a section/category. For this click in front of the line until the checkmark is gone and save these changes. Be aware that on a higher level (the category list) the marking with the lock will disappear as well, since the complete section/category is no longer confidential (now one item is marked as not-confidential).

Mark a single item as confidential:

To mark a single item within a section/category as confidential. Open the section/category and click in front of the line of the item until a checkmark is visible. While changes have not been saved a green marking will appear indicating the unsaved changes.

After saving the changes a lock will indicate that this item is marked as confidential.

Figure 2 Marking an item as confidential

Note: Be aware that on category level it is not visible that this category contains one or more confidential items, unless the whole category is marked as confidential (then a lock will appear in front of the category)

2) **Provide access to users to a certain (group)list.**
   a. At the desired level, a colleague/employee can be added to the (group)list. Using the known functionality of “Invite a team member”.
   b. The user will be added to the user overview. Depending on the selected level that the user has been added this can be on group list level or on list level. When somebody has access to the groups list, this is not visible on list level and vice versa.
   c. Deleting an user account cannot be done by the CustomerAdmin. A user with the Tenant role however can delete a user account from the list.

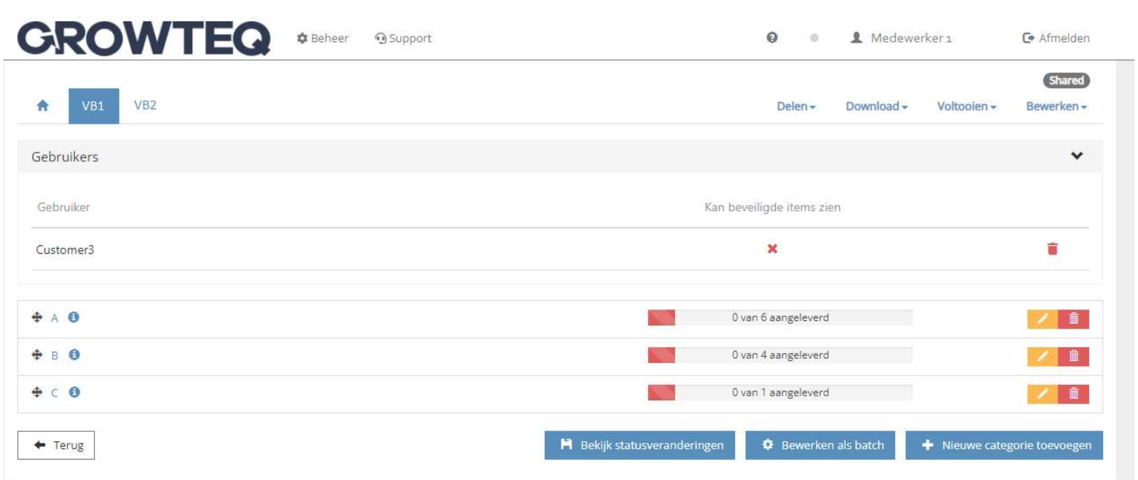


Figure 3 View as TenantAdmin, unable to hand out rights to secured items but can delete a user from the (group)list.

3) **Provide access to confidential items.**
   In the user overview of the (group)list click on the red cross of the specific user that should have access to the confidential items and click on the “Save” icon on this page to save the changes.

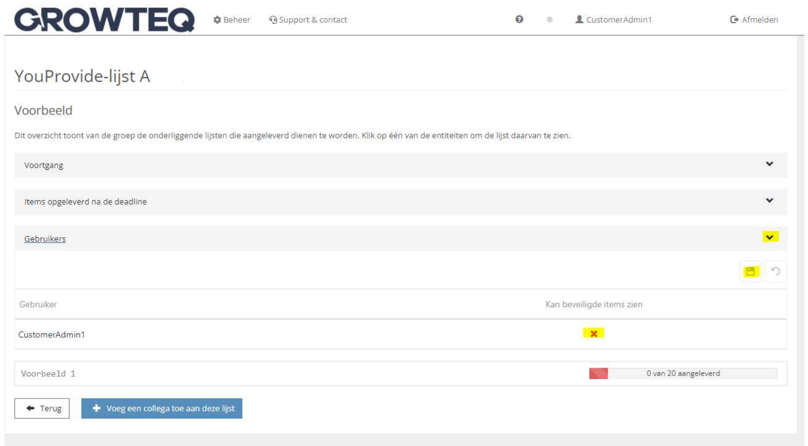


Figure 4 Adjusting the rights for a user account to confidential items on grouplist level.

Once the changes have been saved the user account that has access to confidential items will have a green checkmark icon, as is been seen in the image below.

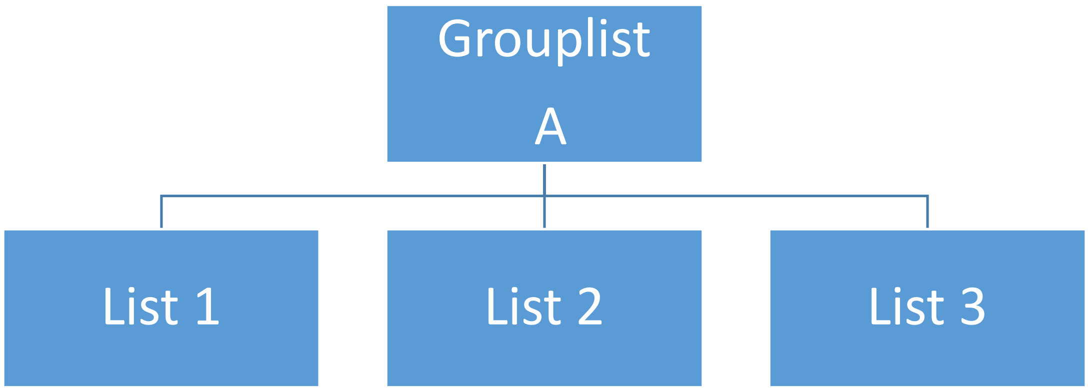
Figure 5 collegalijstInvite has access, other users do not have access to confidential items

4.2. Access structure

It is important to realise that when a user has access to confidential items on grouplist-level this right is inherited by all the lists within that group, meaning the user has access to ALL confidential items.

There are scenarios that this might not be the desired outcome.

With the following structure several scenario's will be discussed and a suggestion for handling the access will be provide.



Situatie	Inrichting
User should have access to all confidential items of all lists.	Invite this user at grouplist-level and hand out access to confidential items on grouplist-level.
User should have partial access to confidential items and full access to all lists for the non-confidential items (list 2 access, list 1 and 3 no-access to confidential items)	Invite the user at list level for lists 1,2 and 3. Only at list 2, hand out rights for confidential items.
User should be able to reach confidential part A (for e.g. Permanent) but not B within list 2.	This is not possible with the current functionality. **Alternative:** Create a separate list and do not invite the user to his list. Or do not hand out the Confidential items rights to this user on that list.