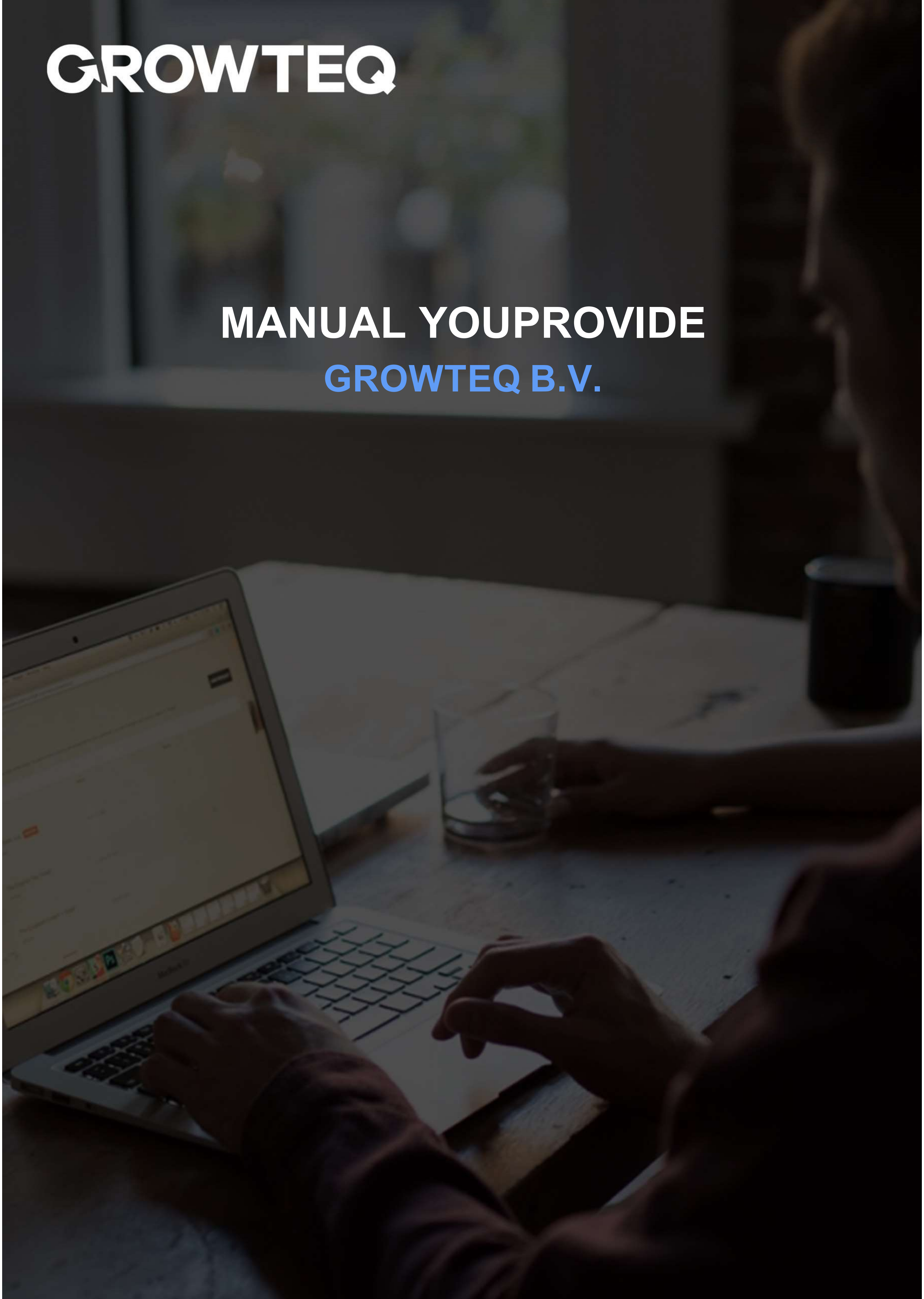
GROWTEQ

MANUAL YOUPROVIDE

GROWTEQ B.V.



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1 Introduction

YouProvide is a Growteq product. With YouProvide you can request organized files from your client and receive and download them in a structured way.

The simplicity and clarity of the list, the speed of creating, editing and sharing the predefined list and the structured storage of the files, ensure that you receive the necessary files for your assignment faster and more securely. For the customer we have created a secure environment where he can deliver his files.

The user process is briefly explained in this user manual. If there are any questions or comments about YouProvide or this user manual, you can email it to **support@growteq.nl.**

Are you currently subscribed to the free version of YouProvide?

Within this version you can only create and share one list with your customer. Do you want to create more lists? Please contact Arnoud van der Heiden via e-mail avanderheiden@growteq.nl, telephone: +31 883 377 202.

2 Versions YouProvide

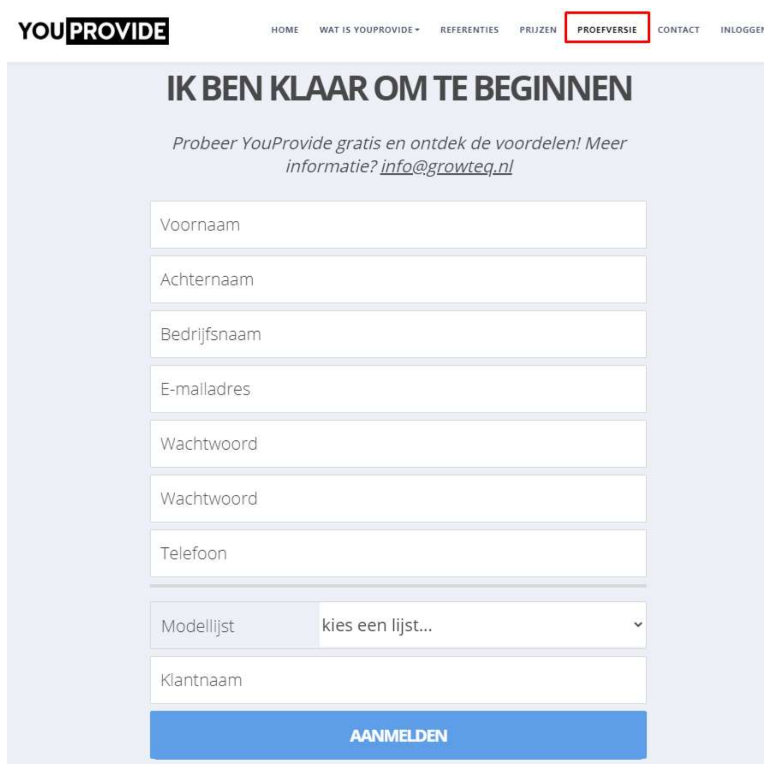
	BASIC	ADVANCED
Unlimited number of lists and files	V	V
Multiple entities in 1 list	V	V
Access for several colleagues per list	V	V
Monitor deliveries	V	V
Possibility to post responses to deliveries		V
Own templates	10	10
Own logo	V	V
Login dual authentication	V	V
Login function for the customer + recording of multiple contacts		V
Add comments to list items (by accountant and customer)		V
Add statuses per item / insightful for accountant		V
E-mail notifications with changes / deliveries		V
Import list from Excel		V
Personal dashboard		V
History of actions is logged		V
Export of all items (in one ZIP file)	V	V
Export all comments		V
Confidential Items		V
Downloading / importing templates	V	V

3 Register the first time

Go to the website: https://youprovide.nl/.

Register on the website for a free test account.

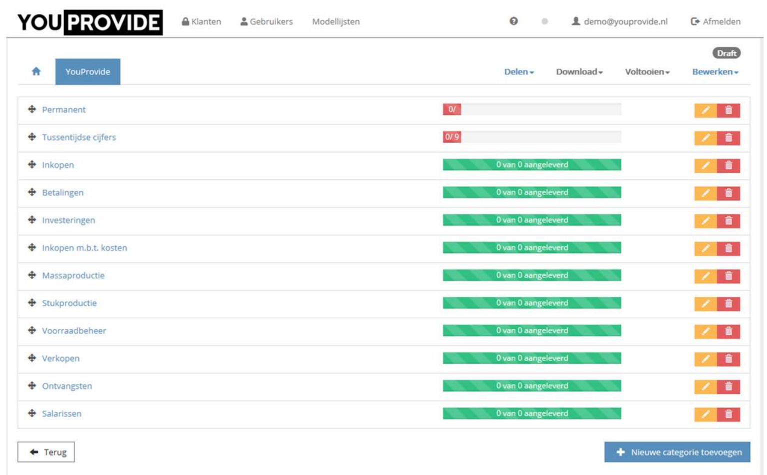
Start working with YouProvide: choose an existing template or create your own list; click on *Login.*



4 Working with YouProvide

4.1 Overview page

After successful registration you will be taken directly to the list that you have created and want to send to the customer.

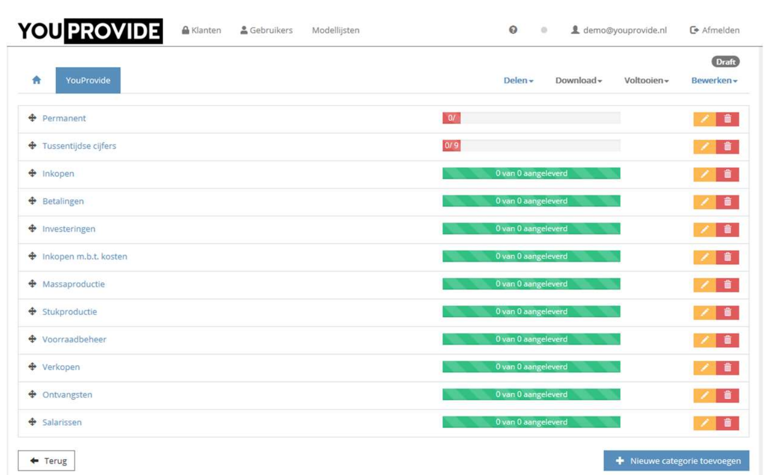


4.2 Note: logging in the second time

If you have already registered before, you will return to the list by clicking on Login on the YouProvide website in the top right-hand corner of the menu. After entering your login details, you will arrive at the overview page. The blue tile contains the list that you created earlier.

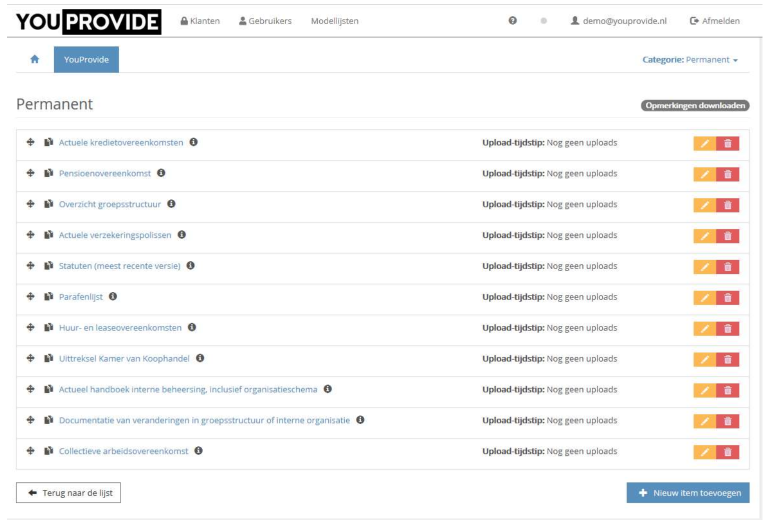
4.3 Main categories

At the list, you come to the overview with main categories. You can adjust the main categories here and indicate whether an item is applicable or not. Additional categories can also be added.



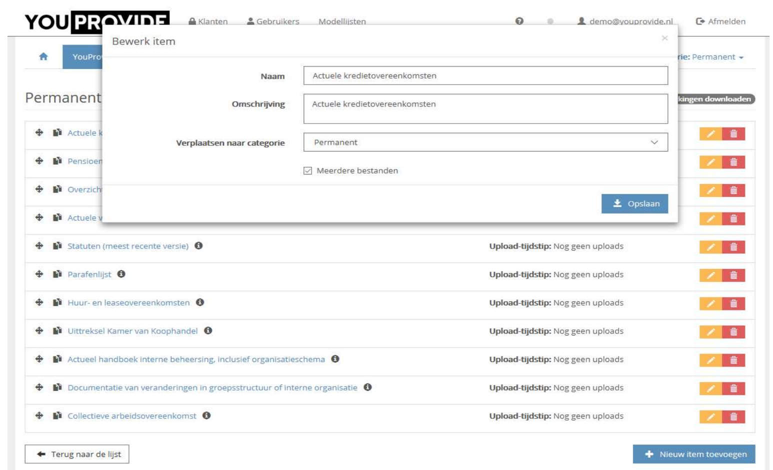
4.4 Subcategories

If you click on a main category, you will come to the subcategories, here you can adjust the subcategories, and indicate whether an item is applicable or not. Additional subcategories can also be added.



4.5 Edit item

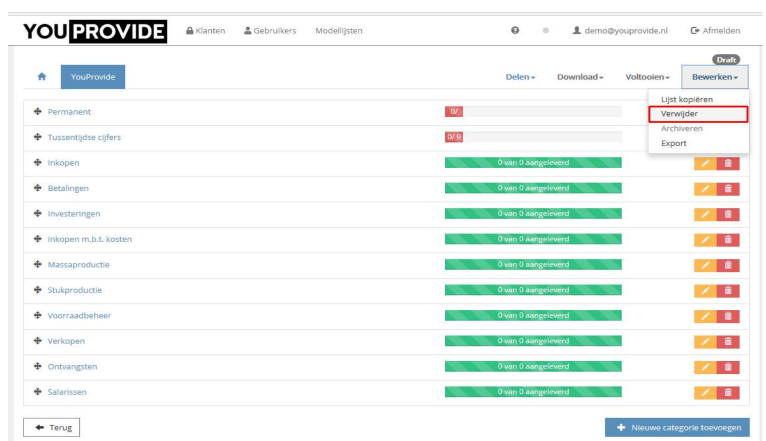
If you click on *edit item*, the following things can be changed: Name, description, category and whether multiple files can be uploaded



4.6 Delete sublist

If the sublist is not yet shared, the list can still be deleted.

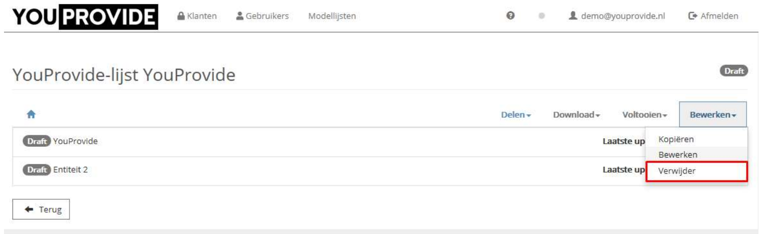
This can be done by clicking on edit and then on delete.



4.7 Delete complete list

If the complete list is not yet shared, this list can still be deleted.

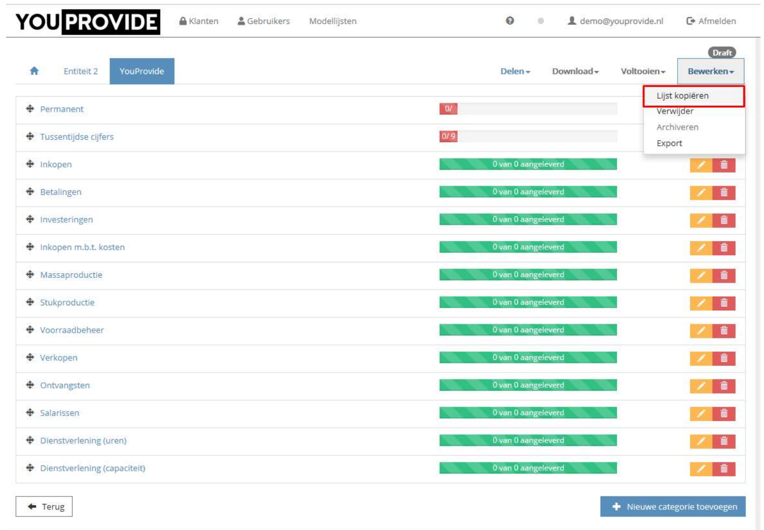
This is possible by clicking on edit at the top level and then on delete.



By clicking on the *category* button (top right) you can easily switch between the different categories

4.8 Copy sublist

If the list has been changed for an entity and you want to copy it to other entities, also from other subscriptions, you can choose "copy" in the top right. Then select to which entity and subscription you want to copy the list and click on copy. The list is then copied to the other entity. This makes it easy to quickly copy a standard list for the group to the other entities inside or outside the group.



4.9 Import list template

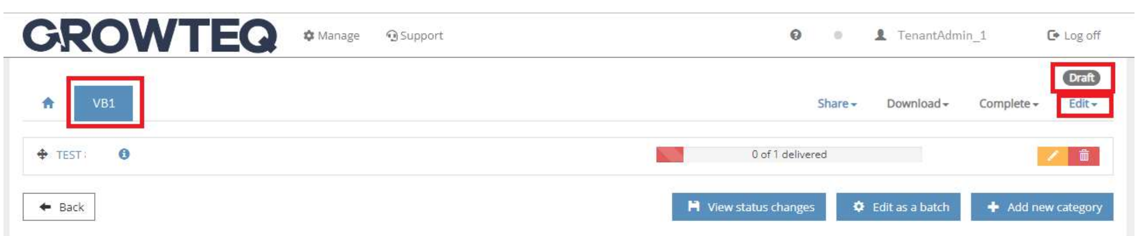
This functionality is only available to users that have at least one of the following roles in their useraccount: TenantAdmin and / or TenantUser.

1) Create a new list.

In order to create a new list, you can use the default functionality. In the mainpage of Youprovide click on the button “+ New List” fill the required fields for this list and press “Save”

Note: In case a list is already available for this purpose please be aware that in order to use the import functionality the status of this list must be “Draft”. The original content and structure will be deleted when the list template is uploaded.

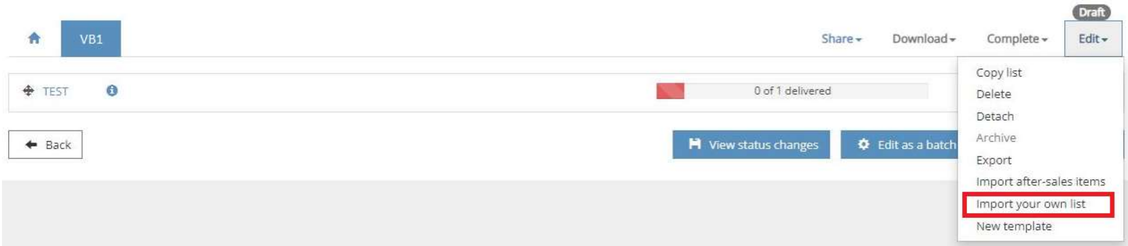
2) Open the list and move to list level



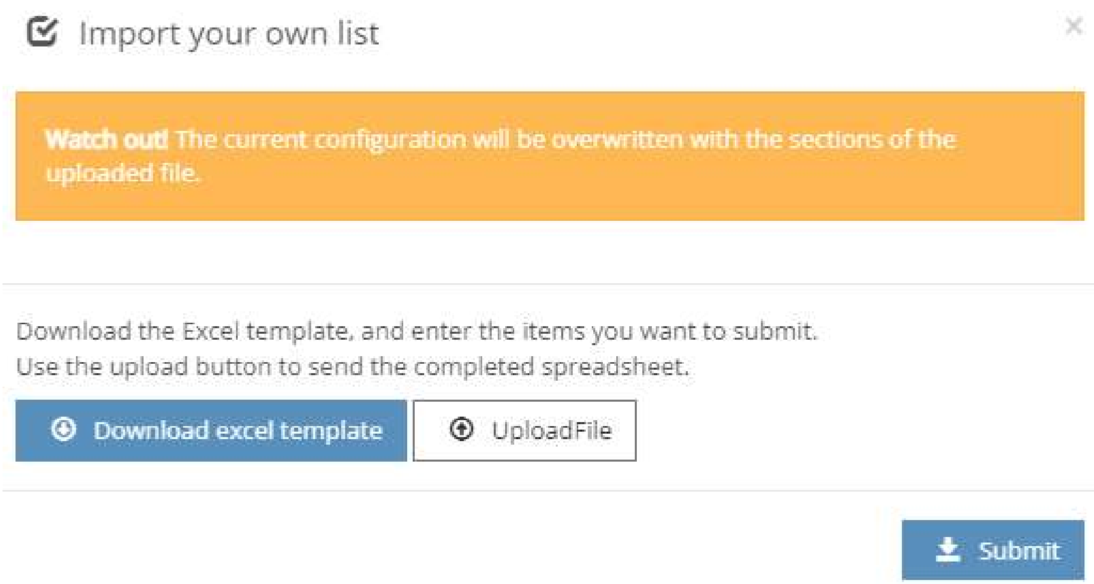
1. In the created list (or the already available list) go to the list level.
   In this example we are on list VB1
2. Confirm that the status of this list is “Draft”

3) Download the list template format

1. Starting on the list level (here VB1) click on "Edit".



2. Select the option "Import your own list"
3. The following pop-up menu will apear:



4. Press the button "Download excel template"
   A download of the file named Template will start and can be found in your downloaded items.

4) Filling the excel template

1. Open the template file you have received in the previous step in your downloaded items. Below you see an example of an empty template file.

	A	B	C	D	E	F
1	Referentienummer	Sectienaam	Sectieomschrijving	Itemnaam	Itemomschrijving	Niet van toepassing
2						
3						
4						
5						
6						

Figuur 1 Example of an empty list template

A brief explaination on the structure of the template :

Colomname	Type	Functional use
Referentienummer (referencenumber)	Text	This value can be seen when you download the files.
Sectienaam (section name)	Text	This is a value that is visible in the list
Sectieomschrijving (section description)	Text	This value can be found underneath the (i) after the section name
Itemnaam (item name)	Text	This is a value that is visible in the list (as item)
Itemomschrijving (item description)	Text	This value can be found at (i) after the item name
Niet van toepassing (Not applicable)	Boolean	A value 0 or 1 is required. 0 is the value for an item that is applicable. 1 is the value in case the item is not applicable. (it will then be visible but the text is marked with strikethrough).

For the purpose of this manual we shall use the following data for our list template:

Referentienummer	Sectienaam	Sectieomschrijving	Itemnaam	Itemomschrijving	Niet van toepassing
ADV1	ADVS1	ADV_sectie1_1	ADV_Item1_1_1	ADV_item1_1 Omschrijving	0
ADV1	ADVS1	ADV_sectie1_1	ADV_Item1_1_2	ADV_item1_1 Omschrijving	0
ADV1	ADVS1	ADV_sectie1_2	ADV_Item1_2	ADV_item1_2 Omschrijving	0
ADV1	ADVS1	ADV_sectie1_3	ADV_Item1_3	ADV_item1_3 Omschrijving	0
ADV2	ADVS2	ADV_sectie2_1	ADV_Item2_1	ADV_item2_1 Omschrijving	0
ADV2	ADVS2	ADV_sectie2_2	ADV_Item2_2	ADV_item2_2 Omschrijving	0

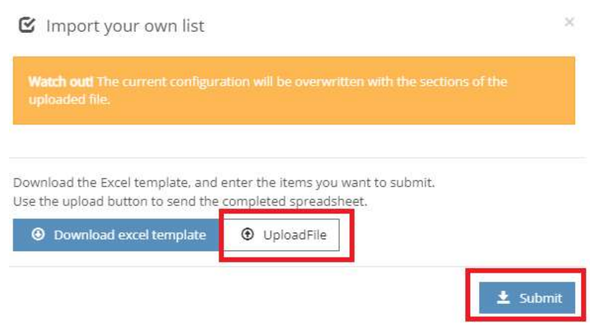
Save the file and close the item in excel.

5) Importering the list template

The template file we filled and saved in previous step is ready for import.

<u>In case your screen is still open (with the popupmenu)</u>

Click on the button “UploadFile”, select the template and click on “Submit”



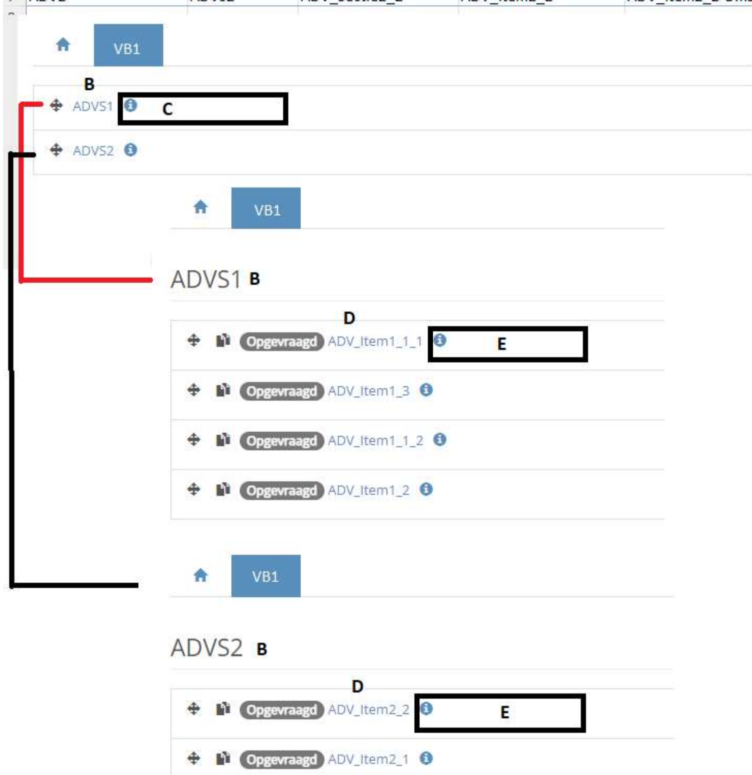
<u>Pop-up menu not available anymore</u>

In case the popup menu has been closed, please follow the steps to reopen this by going to the the list level, clicking “Edit” and choose “Import your own template”. Then you can use the “UploadFile” button, select the template and “Submit” the file.

6) Validate

Underneith an overview of the template v.s. YouProvide after submitting the template. The letters are a reference to the columns of the imported template.

	A	B	C	D	E	F
1	Referentienummer	Sectienaam	Sectieomschrijving	Itemnaam	Itemomschrijving	Niet van toepassing
2	ADV1	ADVS1	ADV_sectie1_1	ADV_Item1_1_1	ADV_item1_1 Omschrijving	0
3	ADV1	ADVS1	ADV_sectie1_1	ADV_Item1_1_2	ADV_item1_1 Omschrijving	0
4	ADV1	ADVS1	ADV_sectie1_2	ADV_Item1_2	ADV_item1_2 Omschrijving	0
5	ADV1	ADVS1	ADV_sectie1_3	ADV_Item1_3	ADV_item1_3 Omschrijving	0
6	ADV2	ADVS2	ADV_sectie2_1	ADV_Item2_1	ADV_item2_1 Omschrijving	0
7	ADV2	ADVS2	ADV_sectie2_2	ADV_Item2_2	ADV_item2_2 Omschrijving	0



When the list isn't quite as you desired, an updated version of the template can be imported. This will however delete the previous version.

This can be done by following the previous described steps. Or you can update your imported template file according to the desired version and upload this newer version (see step 5)

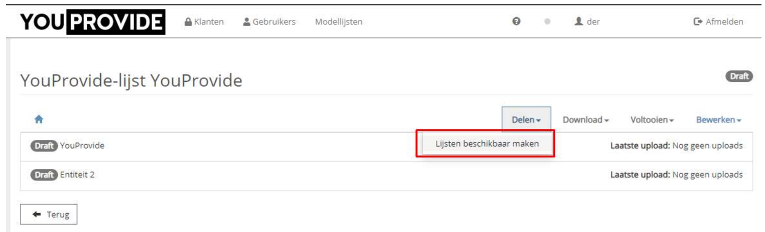
As mentioned earlier (the value on Column F is marked as 1 (not applicable)). YouProvide will show this item but the text is strikethrough

5 Sharing and making a list available

5.1 Making the list available

When the list is complete, it can be shared with the customer. For this, the list must first be made available.

This can be done by clicking on the *share* button. Then click on *make lists available.*



5.2 Share list

When the list is available, the status changes to shared. The list can then be shared with the customer. This can be done by clicking on share. You then get the following options:

- Return list (s) to draft
- Send mail
- Copy link

Making lists available: This function sets the status of the list (s) to shared. This makes the link that is generated available to the customer. This link can be found under the function "Copy link" and is automatically processed in the mail template in the function "send email".

Send email: With this function you can send an email with the link to the list (s) to one or more people. The e-mail addresses (maximum 5) must be separated with a semicolon. After you have sent the e-mail, the lists are automatically set to the "shared" status.

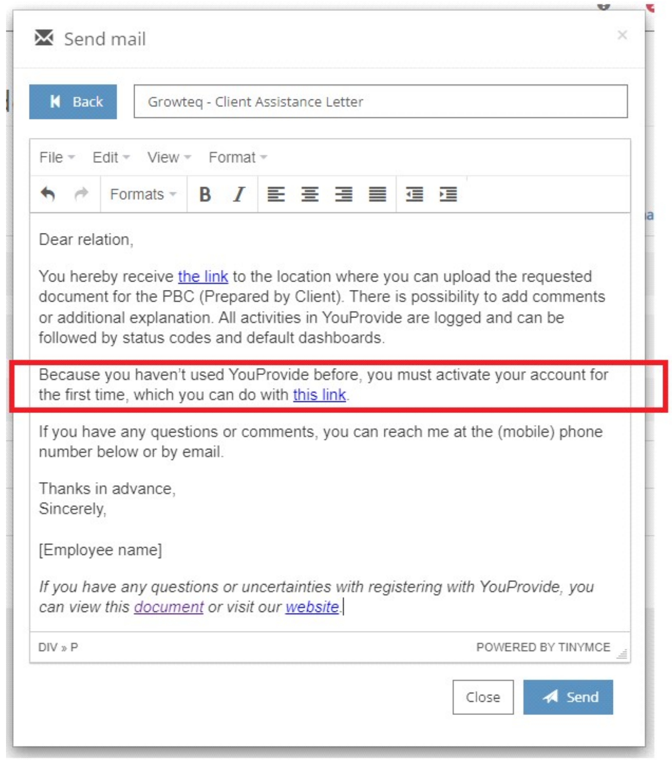
Copy link: With this function you can copy the link for the customer and use it for example to send from your own mailbox. *Note: share at least one list before you start using the link. Otherwise it is not accessible via the link.*

5.3 Send e-mail to customer

If you choose the *send email* option, you will see a standard email. You can adjust this yourself.

In case an **Advanced list** is used and **the customer has not used YouProvide before** the e-mail will mention that the user has to activate their account first.

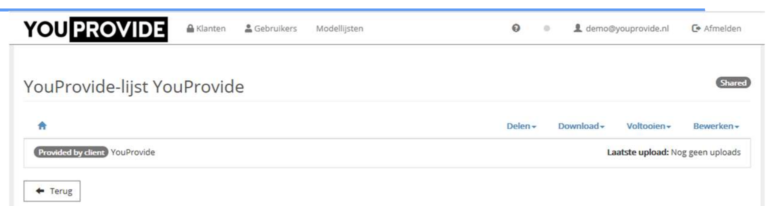
Everything complete? Click on *send*. The customer receives this email with the link in it to deliver his files.



The progress of the deliveries of the customer can be followed on the overview page!

6 Return list

If the customer has uploaded the files and has shared the lists, it says 'offered by the customer'. The list is then no longer available for the customer. If there are still additions, the list can be shared again by clicking on 'make available' on lists.



If the customer has completed the list, the customer can click on the "submit list" button. At that time the list is no longer visible to the customer and you see the list with the status

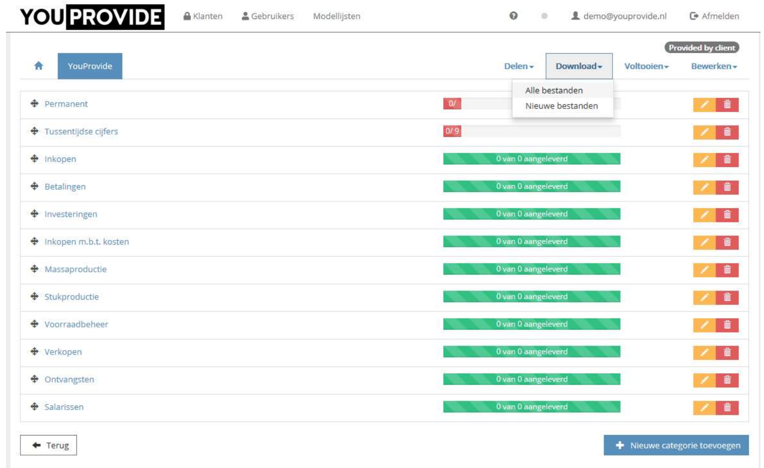
"Offered by customer". If there are any additions, you can make the list available again in the "share" menu under "make list (s) available."

6.1 Download files

In the overview you can choose to download all files, or only all new files.

With all files, all files uploaded by the customer are downloaded.

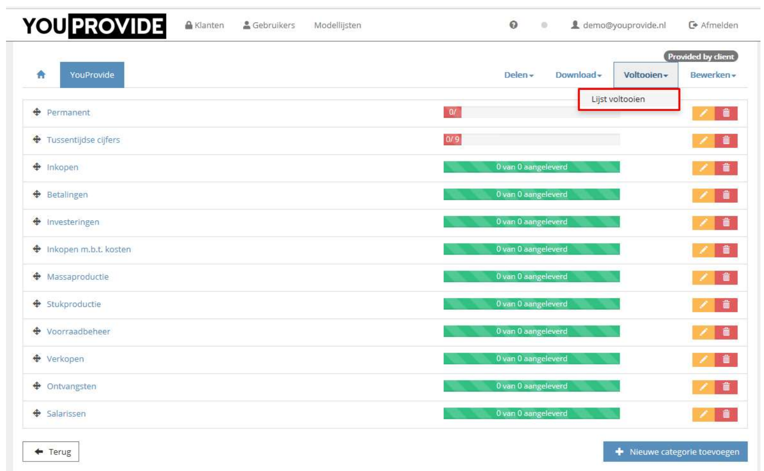
For new files, only those files that have not been downloaded before are downloaded.



6.2 Closing list

If all files are correct, the list can be closed. This can be done by clicking on complete list.

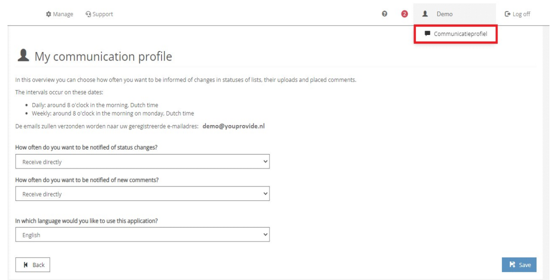
If more files are needed, sharing can be chosen again.



7 Functionalities YouProvide Advanced

7.1 Communication profile

A communication profile can be created with this function.

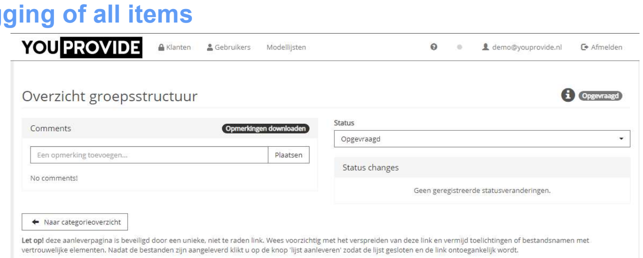


This allows you to set the desired application language and when you want to receive notifications of status changes and when comments have been placed on an item.

Both the language as the 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.

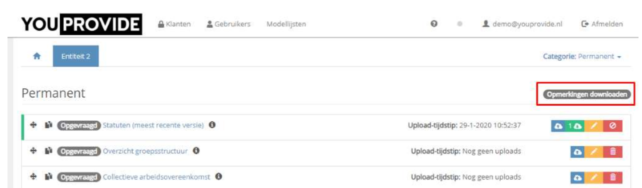
7.2 Possibility to post comments + logging of all items

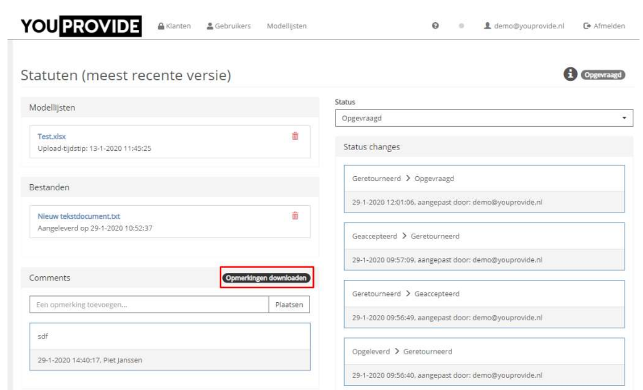
At the list-item level, it is possible for the customer and the Accountant himself to post comments. Activity is also being logged, so that you can see exactly who and when a comment has been posted.



7.3 Downloading comments

As an accountant you can also download the comments. This can be downloaded per list, category or per item. When downloading all files from a list, in addition to the supplied files, you will also receive the comments posted in the same .zip file. To download per category, click the desired category.

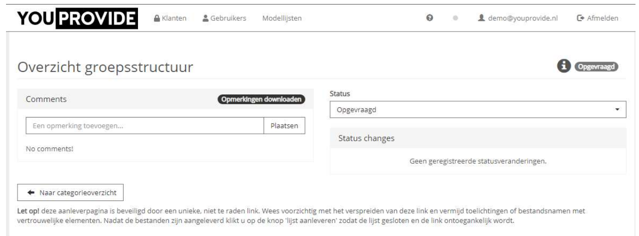




Then click Download Comments. If you want to download the comments for an item, click on the item and click Download Comments.

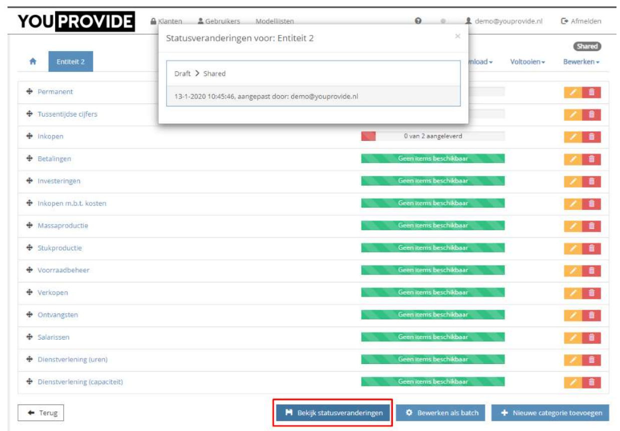
7.4 Statuses

At the list item level, it is possible to change the status. In principle, this status changes with the status of the list itself. But if it is necessary to return an item, you can set the status to *to be returned* with a comment.



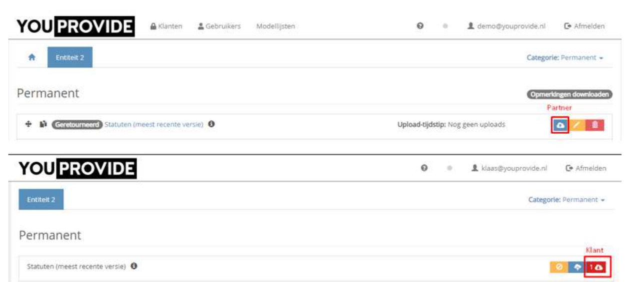
7.5 Check for status changes

With this function, the partner can see at a glance whether there have been changes to the relevant list.



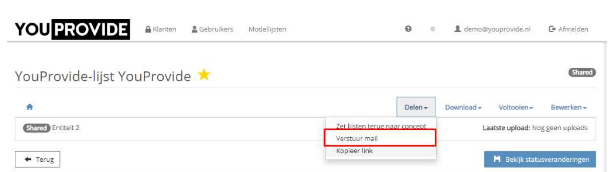
7.6 Upload file example

With this function, the partner can upload a sample file by clicking on the blue upload button and selecting the document and clicking on Save. The customer then has the option to download and use this example. This can be done by pressing the red download button. Download will then start automatically.



7.7 invite customer

When sending an e-mail to a customer who is not yet registered, an account will be created automatically in combination with the e-mail address of the customer. The customer receives an email to activate his account and also a link with the shared list. Please note: the customer can only open the list if he has activated the account and is logged in.

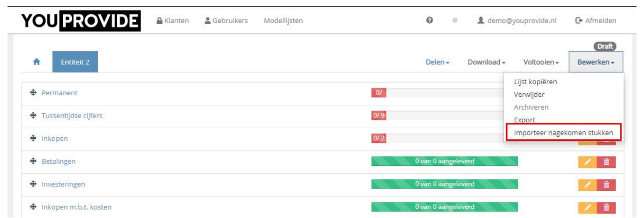


7.8 Login function for the customer

If the customer list is shared with the customer, he must first log in. For this, the partner must create a user with the customer-admin role. These users with this role can, if necessary, create other users with the customer role. This will be useful if the customer wants to fill the list with several people.

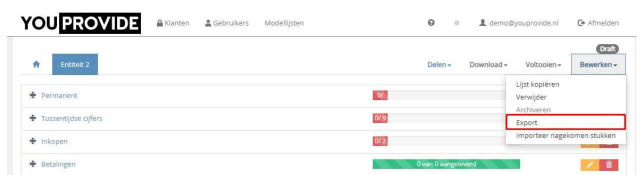
7.9 Import from PBC list based on an Excel document

With this function you can create a PBC list using a template that you can download. If this has been prepared, it can be entered in the existing list. In addition, this PBC list can be supplemented by entering the template with the new items. Of course it can also be adjusted by editing this category via the **Edit as batch** button.



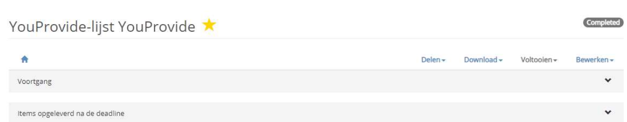
7.10 Export

This function can be used to export lists to a .xlsx file.

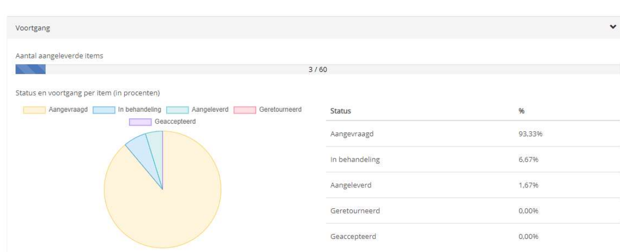


7.11 Dashboards

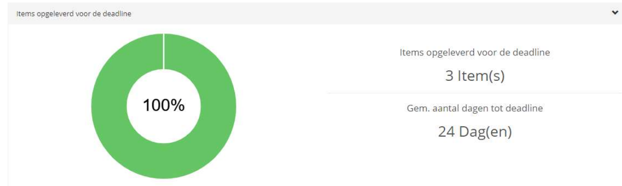
You can find the dashboard on the page of the customer list. The dashboards are folded when you visit this page. You can expand them by clicking on the arrow on the right.



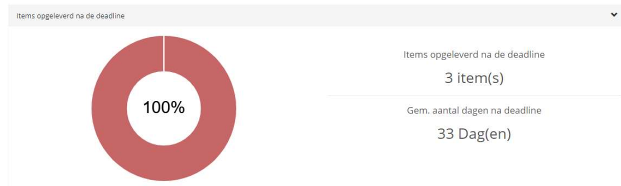
Dashboard progress.
Here you get an overview of the progress of all sub-lists in this list.



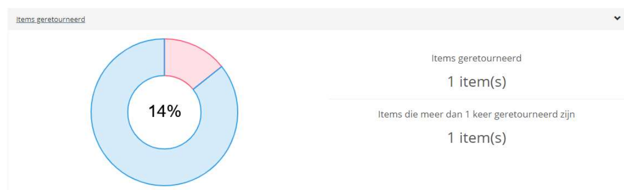
Dashboard "Items delivered before the deadline".
Here you have an overview of the number of files that were submitted before the deadline. With the average time for the deadline.



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.

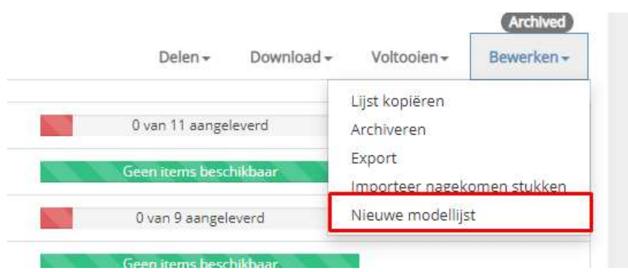


Dashboard “Items returned”.
Here you get an overview of whether there are items that have been returned one or more times.



7.12 Model list

It is possible to use the list as a model list via Edit. **This option becomes available to everyone when creating a new list.**



7.13 Confidential items (Customer Admin functionality)

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 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”)*. The user with this role can mark certain categories or items as Confidential.

Since it might be possible that your customers may have questions with regards to this functionality, we will explain the workings of this functionality within this part of the manual. Also for deleting a user on a list, the customer will require your assistance (as is mentioned in paragraph 7.13.3)

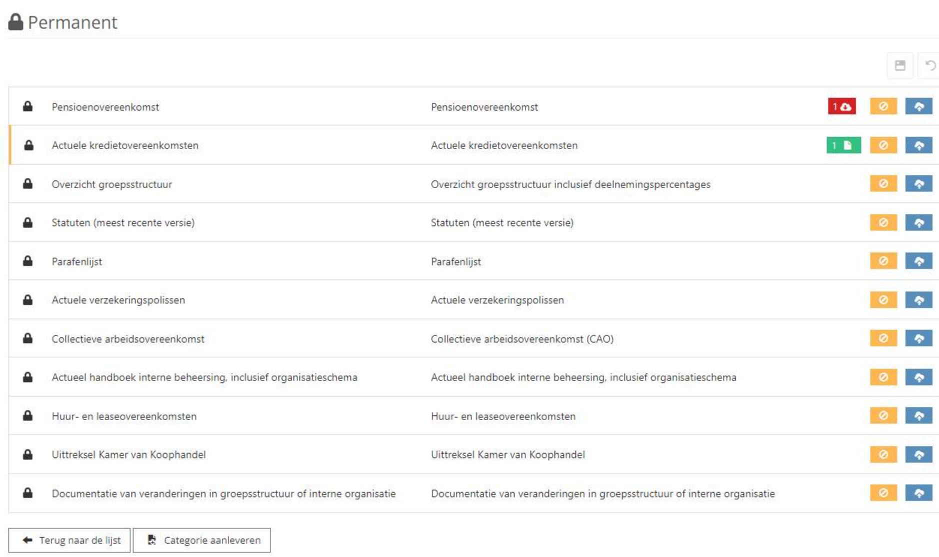
7.13.1 Mark category as confidential

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 2 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).

7.13.2 Mark 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 3 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)

7.13.3 Add user to (group)list (optional)

*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.*

1. At the desired level, a colleague/employee can be added to the (group)list. Using the known functionality of "Invite a team member".
2. 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.
3. 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.**

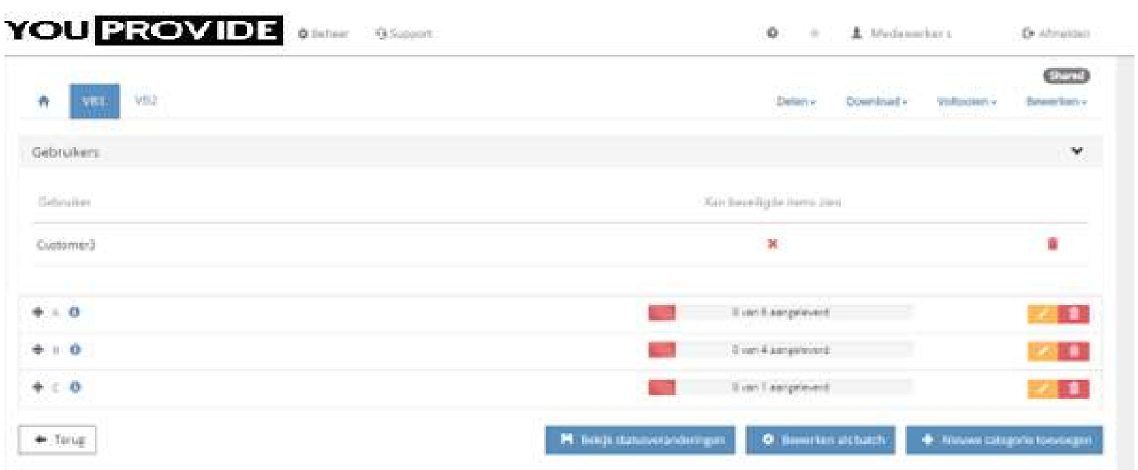


Figure 3 View as TenantAdmin. The TenantAdmin is unable to hand out rights to secured items but can delete a user from the (group)list

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 their rights have been granted.

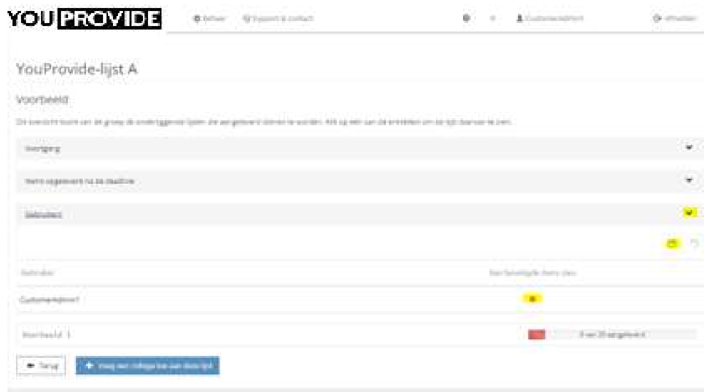
There is no further subdivision possible. *(see access structure for suggestions)*

7.13.4 Add confidential access to a user

The CustomerAdmin controls which user has access to the confidential items. By default a newly added user to the list will **<u>not</u>** 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. (see access structure for suggestions)

To give a user acces to the confidential items: press the X icon and the Save button



When the user has access a green checkmark will be visble, as seen below.

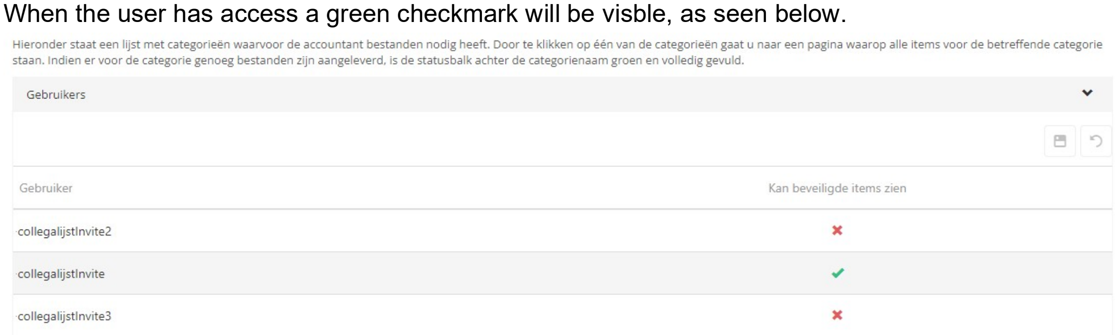


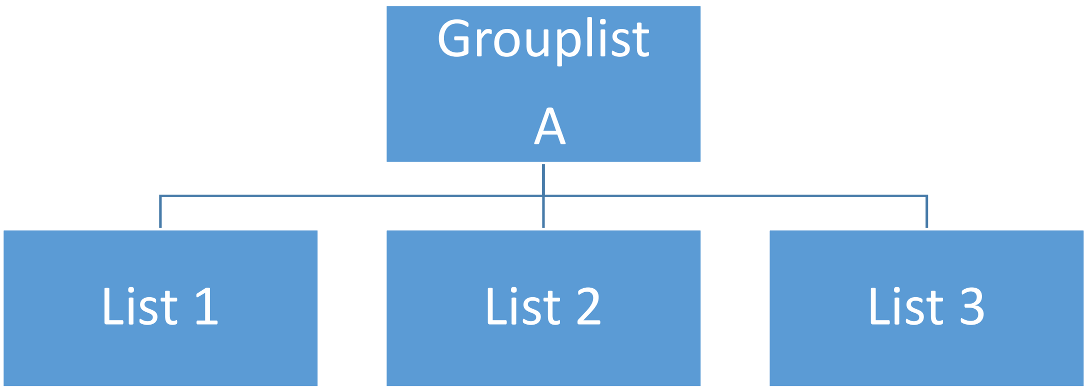
Figure 4 collegalijstInvite with access, others without access to confidential items

7.13.5 Access structure – with regards to the confidential items

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.

8 Management

8.1 Customers

At the top of the start screen is the **Manage** button. By clicking on this, a menu will become available. We click on Customers.

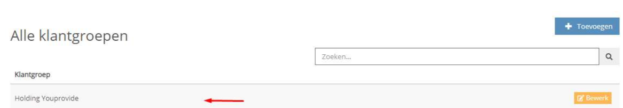
You will be taken to another page where you can perform customer management.

To create a customer group, click the **Add** button.

Here, enter the master data of the customer group. In addition, the person who must be linked to this customer, must be added. This can be more than one person.

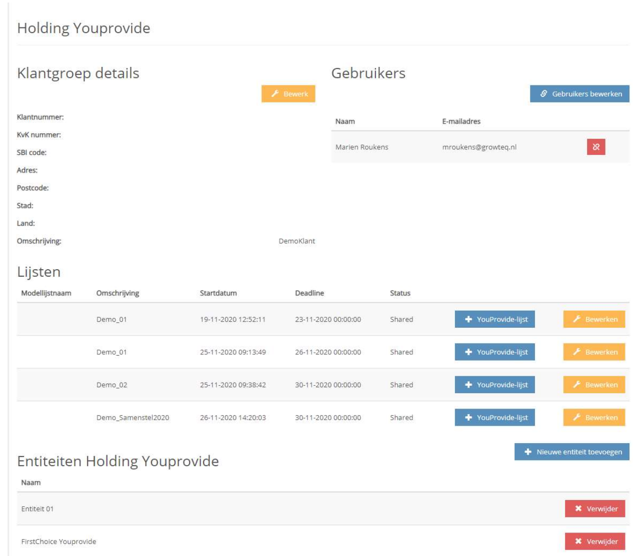
To edit the customer group afterwards, click on the yellow button **Edit**.

To view the content or the details of the customer group, click on the line itself.

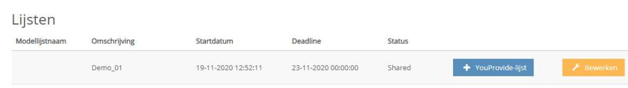


You will enter another screen where you can see all the details of that specific customer group.

To add entities to the customer group, click on **Add new entity**. You will then be taken to a page where you can enter the details of the entity.

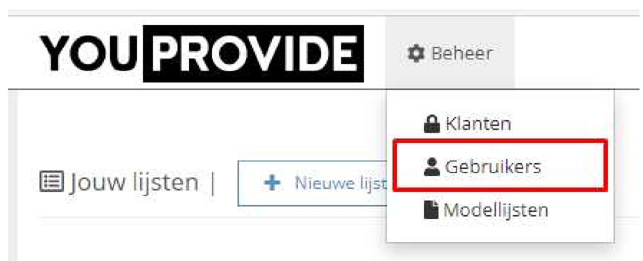


On the detail page there is also a field with lists. Here are all existing lists that are linked to the customer. The list can be opened via the **YouProvide list** button.

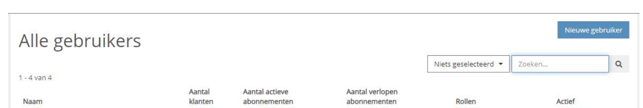


8.2 Users

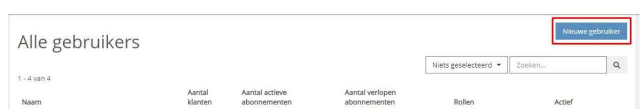
At the top of the start screen is the **Manage** button. By clicking this, a menu will become available. We click on **Users**.



You will be taken to another page where you can perform customer management.

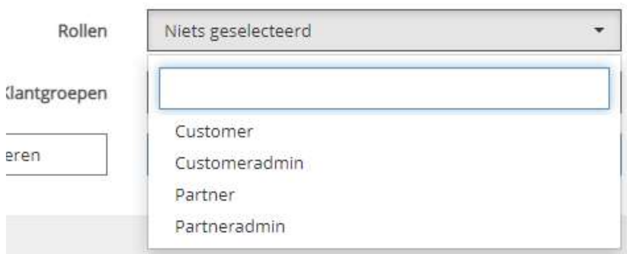


To add a user, click the **Add** button.



You will enter a page where you have to enter the user information.

You must assign roles to the users. By default, the user needs the **Partner** role. If the user also has to create customers or users, the user must be given the **PartnerAdmin** role. Accounts for customers get the **Customer** role. Accounts for customers do not need to be created, this is done automatically when sharing the list.



For customer groups, the customers that the user needs access to will be selected. This can be changed later on, when needed. When this is done, you can click on **Add**.

Users can be edited afterwards by clicking the **Edit** button.