YouProvide

Clients User Manual

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Introduction

YouProvide was launched in 2017 to assist with distributing PBC lists and gathering all necessary documents for an accounting audit. Over the years, YouProvide has evolved into a professional application used and valued by over 50 offices. In 2023, more than 9,000 PBC lists were processed, and 1.8 million files were uploaded via YouProvide.

This document is intended for customer users and provides an overview of the functionality and options for file submission.

Version 1.0 - April 2024

What is YouProvide?

Your accountant utilizes YouProvide to request documents. Various documents such as Chamber of Commerce extracts, investment overviews, trial balances, purchase and sales invoices are necessary for the tasks performed by the accountant. It is crucial that this information is transferred in a reliable and secure manner. Moreover, it is beneficial for all parties to track the status of required information and ensure its accuracy.

This is exactly what YouProvide enables:

- The accountant creates a list of all required files
- As a client, you can log in, view the list, and upload the necessary documents
- If you have any questions, you can immediately ask them regarding the relevant items
- You can keep track of what has been submitted and what still needs to be provided
- If something is not uploaded correctly, the accountant will notify you, and you will see it directly in your dashboard

Security

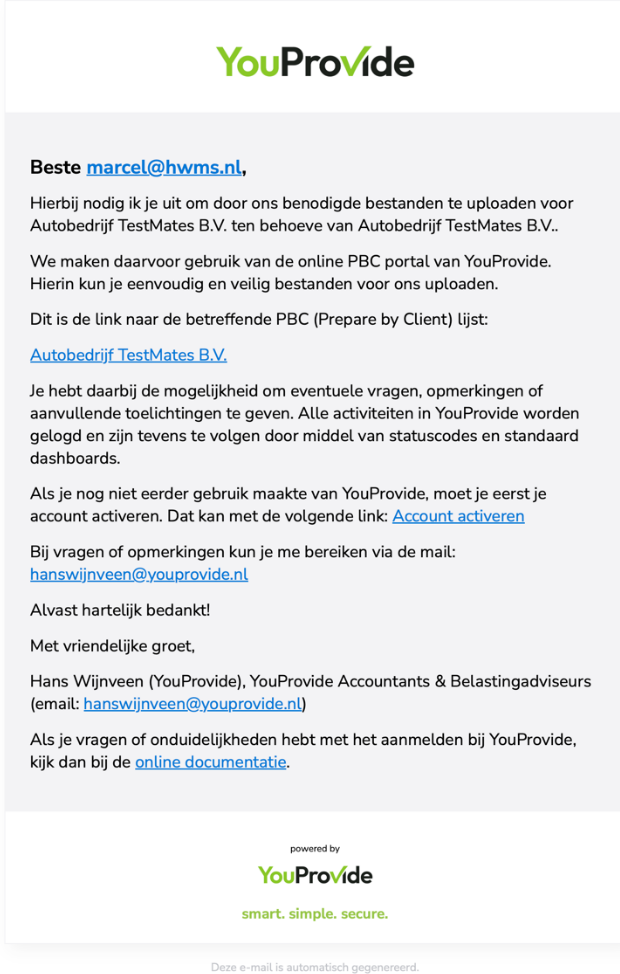
The security of your data is of utmost importance. Therefore, every user must log in with 2-factor authentication. This includes not only email and password but also a verification code via SMS to ensure that no one is misusing someone else's login credentials. The data is stored on securely protected Microsoft servers in Western Europe and is only retained during the duration of the data request list. Once the accountant has all the data and closes the list, all uploaded files are permanently deleted from the YouProvide servers. The management and development of the YouProvide application and servers are outsourced to a technology partner certified with ISO27001 and ISAE3000.

Activate your account

When your accountant requests a list of required files, you will receive an email notification. The email includes a link to the list of required files, but you must first log in to YouProvide.

If you are logging in to YouProvide for the first time, you will need to activate your account. This can be done in two ways:

1. Use the **account activation link** from the email. You will need to provide your first and last name, choose a password, and provide your phone number for the SMS verification code.


YouProvide

Beste marcel@hwms.nl,

Hierbij nodig ik je uit om door ons benodigde bestanden te uploaden voor Autobedrijf TestMates B.V. ten behoeve van Autobedrijf TestMates B.V..

We maken daarvoor gebruik van de online PBC portal van YouProvide. Hierin kun je eenvoudig en veilig bestanden voor ons uploaden.

Dit is de link naar de betreffende PBC (Prepare by Client) lijst:

Autobedrijf TestMates B.V.

Je hebt daarbij de mogelijkheid om eventuele vragen, opmerkingen of aanvullende toelichtingen te geven. Alle activiteiten in YouProvide worden gelogd en zijn tevens te volgen door middel van statuscodes en standaard dashboards.

Als je nog niet eerder gebruik maakte van YouProvide, moet je eerst je account activeren. Dat kan met de volgende link: Account activeren

Bij vragen of opmerkingen kun je me bereiken via de mail: hanswijnveen@youprovide.nl

Alvast hartelijk bedankt!

Met vriendelijke groet,

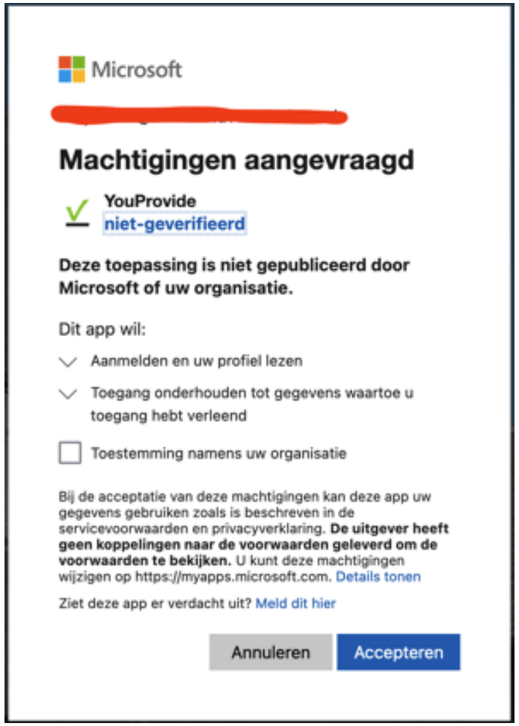
Hans Wijnveen (YouProvide), YouProvide Accountants & Belastingadviseurs (email: hanswijnveen@youprovide.nl)

Als je vragen of onduidelijkheden hebt met het aanmelden bij YouProvide, kijk dan bij de online documentatie.

powered by
YouProvide
smart. simple. secure.

Deze e-mail is automatisch gegenereerd.

2. If you have received the email on a Microsoft-linked email address from your company, there is no need to activate. You can simply click on **Continue with Microsoft** on the login screen.
   However, a system administrator from your organization must approve this authentication method once. To do this, the administrator can go to https://app.youprovide.nl and click on Continue with Microsoft. In the following screen, the administrator can provide approval:

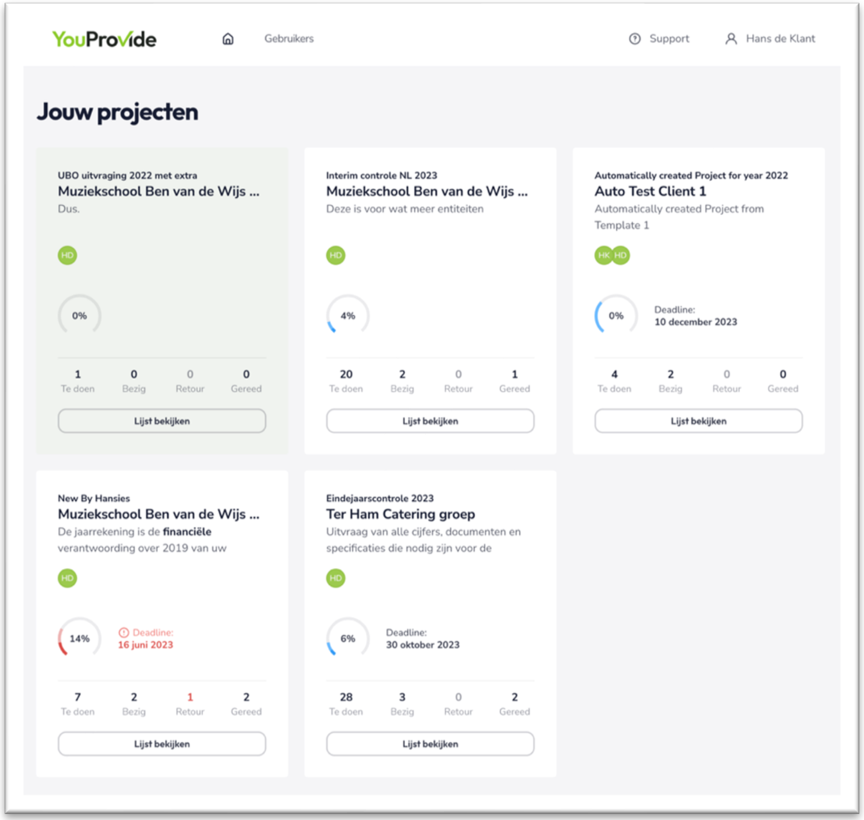
   

Homepage

After logging in, you will land on your Homepage, where the ongoing projects are clearly displayed. Typically, you will only see 1-3 projects at a time.

- For each project, you can view:
- The number of files that still need to be submitted
- Any files returned by the accountant for corrections
- Any project deadlines
- The colleagues involved in file submissions for each project

Click on **View List** to see what needs to be submitted for a project.

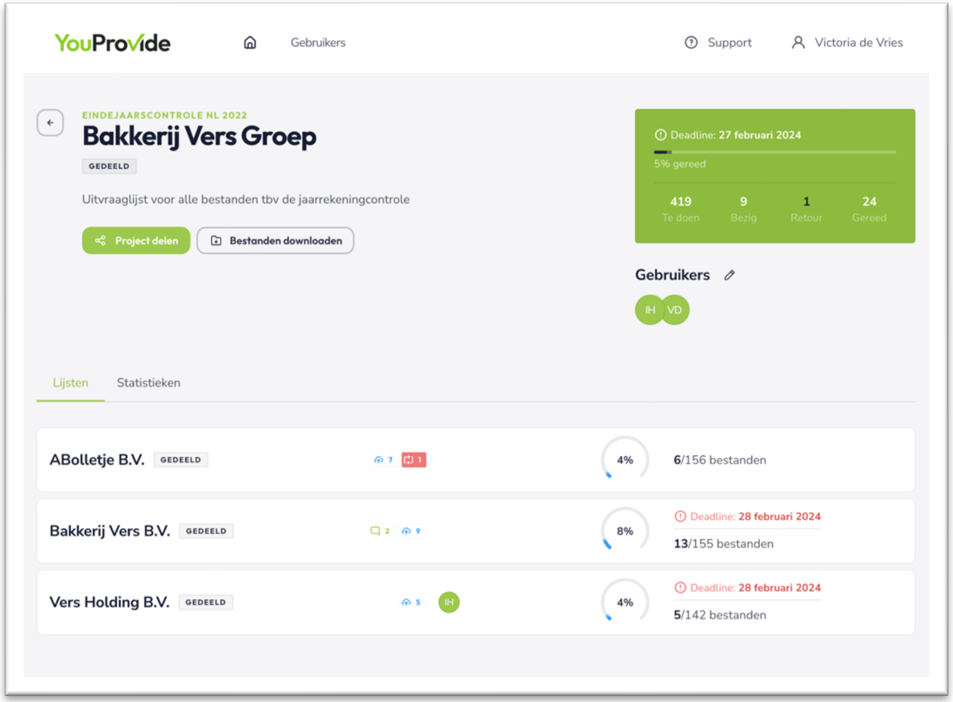


Project

In a project, you will find all the files that the accountant needs. A Project can contain more than 1 list; if the accountant requires data from different administrations or BV's, they are usually requested in separate lists.

In the project screen, you have the ability to:

- Share the project with colleagues: they will receive an email invitation and can assist with providing everything in the project
- Download files that you have submitted in this project. This helps you keep a convenient dossier for the following year
- Add colleagues (users) to the project who have previously worked with YouProvide. They will not receive an email, but can help provide everything in the project
- Choose the list for which you will be submitting files
- View the status and progress (per list or overall)



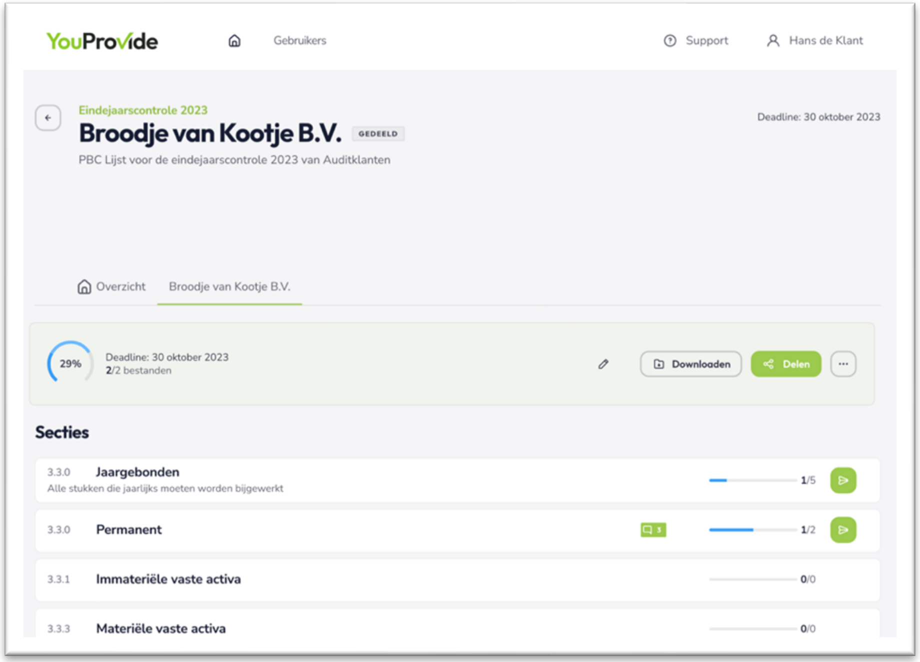
On the **Statistics** tab, you will find a graph for each list showing the progress of the submission process..

List

The list view displays the progress of a specific list as a whole, as well as per section in the list. This allows you to easily see which sections still require information to be provided.

The summary includes:

- Progress (in progress and delivered)
- List deadline (if applicable)
- Number of items delivered
- Colleagues with whom this list has been shared
- Option to download all uploaded files for this list
- Function to share this list via email with existing or new colleagues
- Function to download the list into an Excel document

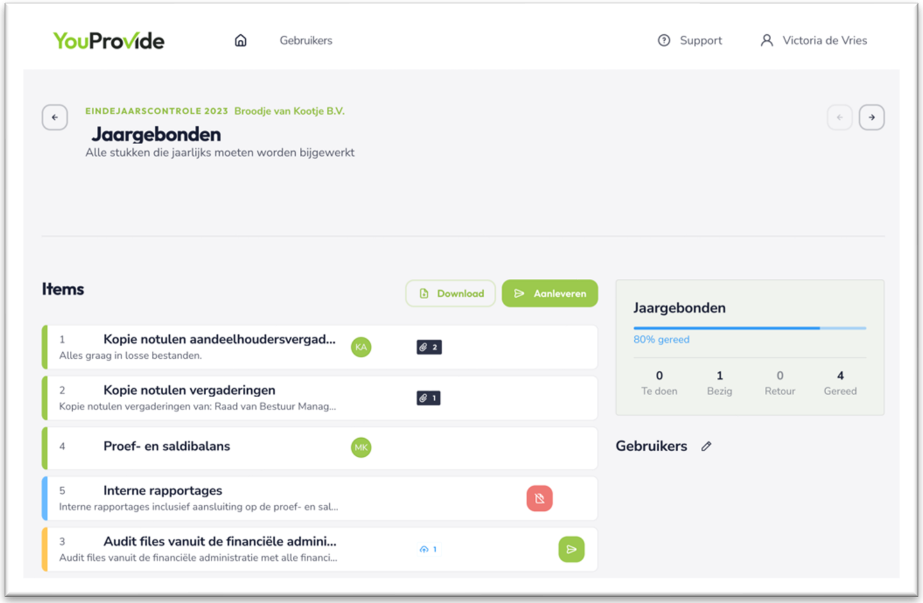


The list of sections shows for each section:

- Whether there are new comments from the accountant
- Number of uploaded files
- Number of items in "returned" status
- Progress of the delivery
- Button to deliver all (possible) items in the section. This button is only visible if there are items in the section where files have been uploaded but have not yet been marked as "delivered".

Section

De section view shows the details of all items within the section and overall section progress.



The lists shows per item:

- Item status (colored left edge)

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- With which colleagues the item has been shared
- If there are attachments from the accountant associated with an item
- If there are any new comments from the accountant
- How many files have been uploaded for an item
- If an item has been marked as "not available"
- If a pending item can be submitted

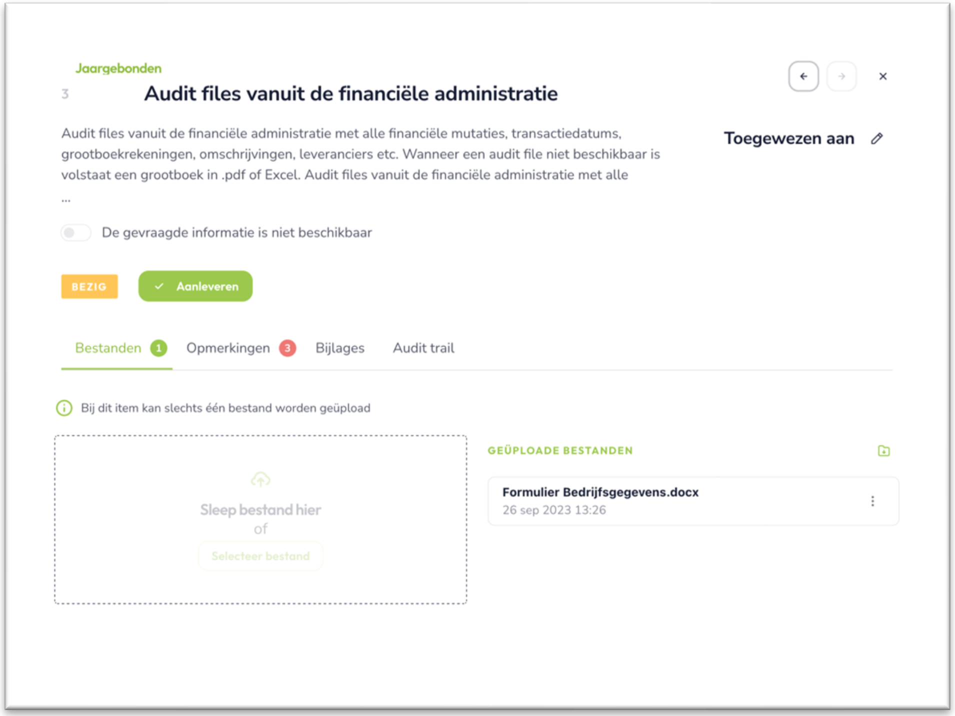
Through the User settings, you can share the entire section with colleagues so they can assist with providing the necessary files.

Item

In the Item screen, you can upload files, add comments, or view the history of an item.

Here you will find:

- The name of the item and the explanation provided by the accountant (hover over the explanation if it's not fully displayed to see the complete details)
- A button to mark an item as "not available." This allows you to submit the item (back to the accountant) without having to upload a file
- The status of the item and, if necessary, a button to submit
- Files (uploaded by yourself or your colleagues)
- Comments
- Attachments (files uploaded by the accountant)
- Audit trail (complete history of this item)



You can share this item with colleagues by using the "Assigned to" option so they can contribute by uploading files.

Use the arrows at the top right to easily navigate to the next or previous item in the section without having to close the window.

Uploading files

To upload files for the accountant, simply drag and drop them onto the upload area or select the desired files through the button and file explorer. You can upload multiple files at once. The accountant may specify that only 1 file can be submitted for an item. If this is the case, it will be indicated in the upload area.

Replacing files

If you accidentally uploaded the wrong file, you can delete the file using the ... button next to the file. Then, you can upload a new file.

Submitted files

Once an item has been submitted, you cannot add or remove files. If necessary, leave a comment requesting the accountant to move the item back to In Progress.

Downloading files

If you want to see which files you have uploaded, you can download them. This can be done per item, section, list, or even the entire project.

Collaborating with colleagues

If you have shared a project, list, section, or item with a colleague, they can access the shared component and all those underneath it. The colleague can upload, download files, and leave comments.

You can add colleagues by sharing a project or list with them (via email) or by creating them in the Users menu. To share a section or item, the colleague must already be created.