# Configuration checklist to Younium.

The purpose of this checklist is to create a quick overview of the settings that needs to be set to run Younium.

## The team

We strongly recommend you to set up a project group with the following roles and competences:

* **Younium Sponsor** - We recommend this role to be part of the companies management team, typically this is a CFO or CEO.
* **Younium implementation project manager** - A project manger from the customers side that can lead you through the implementation.
* **Business controller** - Setting up Younium will need deep insight in your financial operations. Meaning knowledge about your invoicing routines, book keeping, incoming payments and revenue recognition.
* **Financial assistant** - Once up onboarded into Younium, you will need a resource to manage the daily operations. This is typically: creating orders, creating invoices,

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The team

Customer specific settings

In your settings tab the following values:

1. Admin

2. General settings

3. Financial

4. Integrations

5. Accounts

**Accounts default**

6. Orders

7. Invoices

8. Email

## Customer specific settings

In your settings tab the following values:

### 1. Admin

* **Profile** - This is user specific settings, configure your user. Please make sure you have selected the right date and number format depending on your country.
* **Legal entities** - This is your general company information. It will be used to create invoices and other system generated functionalities. Fill out the mandatory information below:
  + Name
  + Organization number
  + Tax registration number
  + Adress
* **Users**
  + Create your Younium users and configure roles. Roles is what permission sets your users will have. We recommend all users in the Younium implementation team to be Admin users, all other users should have limited access depending on their internal position.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 2. General settings

* **Number sequences**

Define if you would like a different number sequence than the Younium default one.

*If you use OCR number on your invoices (ex, KID, FIK, Finnish reference number) you need to delete the value in the prefix- column and also align the number of digits if your bank have a requirement.*

* **Auto renewal - Schedule job**

Younium can automatically renew your subscriptions. In practice that means the end date of the order will be pushed with the amount of months set in your renewal term.

For that to happen, a job to renew your orders must be set.

* Scheduled Jobs - Press Schedule job, select ***Order auto renewal job.***
  + Set start to your next day of business and we recommend you to set the time during the night to have your orders renewed in the morning.
  + Toggle “is recurring” to YES
  + Repeat every: 1
  + Repeat interval: Day.

This setting will renew all your orders with the setting *auto renewal* enabled on the day when the cancelation period is reached.

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### 3. Financial

**Currencies**

* A standard set of currencies are added. Please review that these currencies are the ones that you use for your sales operations. If you need other currencies then the ones set as standard, ad them in this section.
  + Exchange rates - Before creating your first order (subscription) you need to ad a exchange rate to the currency that is used. Please see step below under integrations.

**Chart of accounts**

* Upon creating your tenant Younium will ad a standard chart of accounts. Please consider if you at a later stage want to change this chart of accounts for better financial controlling.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 4. Integrations

* European Central bank - If selling services to other countries please synchronize exchanges rates by pressing the *synchronize now* button.
  + Consider setting up a schedule job to fetch exchange rates on recurring basis.
  + Also please consider what system is master for your exchange rates. Younium defines best practice to use the exchange rates from your accounting software. We support fetching exchange rates from the accounting systems that are connected to Younium.

Notes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 5. Accounts

**Accounts default**

Review your default settings when creating a new customer in Younium.

* Please make sure that there is default invoice template selected. Otherwise the pdf copy of the invoice will not be generated. See invoice template step above.

### 6. Orders

**Unit of measure**

Upon creating your Tenant Younium will ad a standard set of units of measure. Please review that the existing units of measure match your sales operations.

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### 7. Invoices

As default your invoice settings should be left as is, but it is worth taking notes that if you are going to run Accounts Receivables in Younium with OCR reference (KID, FIK, Finnish reference number, Swedish OCR) you need to set it up.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 8. Email

Younium uses your email server for sending out documents from Younium

* Email settings - Here you add the configuration for the email account you want to use together with Younium. Please see more detailed information regarding email settings here (LINK)

Notes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_