



Welcome to Neula*

*a.k.a. Makigami

Topic:

- How do I log in to Neula?
- How do I start the process?
- How do I cancel the process?
- Who accepts processes?
- What is Cadence?
- Tips on how to fill out the form (sample processes).
- Tips for people accepting tasks in processes.
- How do I find out where my case is?
- How do I know what processes are on my to do list?
- Acceptance matrix



To sign in:

- go to Neula:
<https://bpms.intra.loyaltypartner.com/#/login>
- and enter your login credentials (not the same as signing into your PB computer).

If your password
doesn't work, contact
Ewelina or Anna



Enter your e-mail and password

Your e-mail

 ewelina.smolinska@payback.net

Your password

 ••••••••

☐ Remember me

LOGIN

Forgot your password? [Click here](#)

If you do not have an account yet,
please contact Ewelina or Anna.
You will receive information email from
Neula to activate your account

Let's start ...



To start the process:

1. On the Dashboard, select **CASE**
2. Select the correct **PROCESS**
3. Fill out the form and **START NEW CASE** (button at the end of the form)

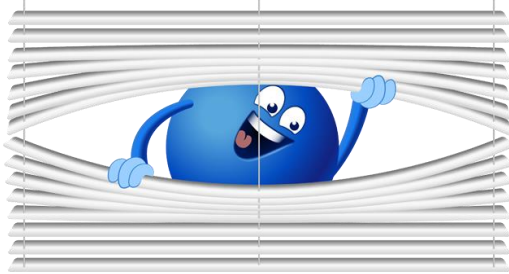
To cancel the process:

4. When creating a form, simply use the red **CANCEL** button on the right side of the form.
5. If the process is already under way, please contact Ewelina or Anna.



If your process **IS NOT ACCEPTED**, you will get an information email from Neula. **FINISH THE CASE.**





Who? What? How?

Who accepts processes in different departments?

- **Accounting** - Anna Kowalczyk
- **Admin** - Ewelina Smolińska
- **Analytics** - Rafał Latkowski
- **Business Growth** - Rafał Grędiszewski
- **Controlling** - Dawid Pyzowski
- **Digital Success** - Robert Olędzki
- **HR** - Anna Muszyńska-Jurków/ Iwona Jeznach
- **IOD (GDPR)** - Dariusz Sadowski
- **IT** - Piotr Awdziejewicz
- **Legal** - Dariusz Sojka & GCO Team
- **Marketing** - Katarzyna Grzywaczewska
- **MD** - Marcin Pilarski
- **Operations** - Grzegorz Leśniak
- **Partner Success** - Tomasz Głos
- **Tax** - Winfried Staebblein



Cadence vs Screening:

- For each CCC process, **Cadence submission evidence** is required - i.e. screen from the CADENCE AMEX database, which you will receive **ONLY** from Anna or Ewelina.
- **Screening** is a confirmation from an email sent to Vendor.Creation.Desk.EMEA@aexp.com, which now also provides you with Anna or Ewelina, and which **WE DO NOT ATTACH** in Neula.





CCC Form [1|3]*

PAYBACK

CCC_ADMIN
CCC_DEDICATED SERVICE SOW
CCC_HR
CCC_KSIEGOWOSC
CCC_NDA
CCC_PARTNERS|CUSTOMERS
CCC_RODO
CCC_VENDORS

Start
CCC_VENDORS

Nowe Normalne Zwycke

SUMMARY

Applicant | Contact person* Date*

Ewelina Smolińska 5 sty 2023

Entity Full Name* (nazwa spółki zgodnie z umową, razem z formą prawną, np. sp.z o.o.)

Document Type* Department* Department Director Email*

-- wybierz -- -- wybierz -- -- wybierz --

Start Date* End Date Termination Conditions

dd-mm-yyyy dd-mm-yyyy

Cadence submission evidence *

Wgraj plik

If Cadence submission is awaiting or not done, CONTRACT CANNOT BE SIGNED !

DOCUMENT *

Wgraj plik

Please attach the final version of the document, completed and ready to be printed out and signed

full **name of the company** in accordance with the National Court Register, which appears in the contract, together with the designation of the legal form (sp.z o.o.; S.A.)

drop-down lists

see slide 5

the only format allowed - **PDF**, DRAG&DROP works here

* Form sample for more complex documents (for CCC_NDA or CCC_RODO the form is much shorter)



CCC Form [2|3]

DODATKOWE ELEMENTY KONTROLNE

1. Proces naliczania/wycofywania punktów w programie:*

- ☐ TAK – manualny proces
- ☐ NIE – proces automatyczny

Czy realizacja kontraktu wymaga manualnego procesu naliczania/wycofywania punktów w programie albo innych działań polegających na manualnym przetwarzaniu danych?

Komentarz*

2. Czy proces fakturowania jest zautomatyzowany i systemy clearingowe są w stanie go obsłużyć?*

- ☐ TAK – automatyczne rozliczanie faktur
- ☐ NIE – manualne rozliczanie faktur

Komentarz*

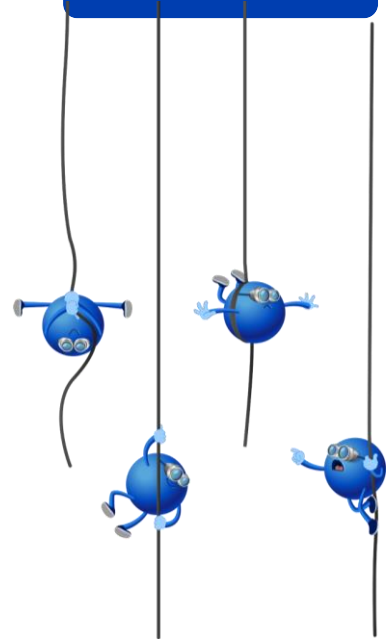
3. Czy proces integracji technicznej jest zautomatyzowany?*

- ☐ TAK – w pełni zautomatyzowany
- ☐ NIE – wymaga dodatkowej pracy

Komentarz*

ADDITIONAL CONTROLS
section is only present in the
CCC_PARTNERS|CUSTOMERS
process

PAYBACK





CCC Form [3|3]

PLEASE CHOOSE DEDICATED PERSON FROM THE LEGAL DEPARTMENT*

-- wybierz --

Select the person from the Legal department who was involved in document preparation

FINANCE | BUSINESS PLAN

Considered in the budget*

☐ YES

☐ NO

Remarks

If the cost is not included in the budget, comment field is required

current year REVENUES*

year + 1*

year + 2*

year + 3*

year + 4*

current year DIRECT COSTS*

year + 1*

year + 2*

year + 3*

year + 4*

If no financial data are available, enter in each of the following '0'

current year OVERHEADS*

year + 1*

year + 2*

year + 3*

year + 4*

current year PTI*

year + 1*

year + 2*

year + 3*

current year MARGIN*

year + 1*

year + 2*

year + 3*

If no data, please put "0" in all cells.

ROZPOCZNIJ SPRAWĘ

After completing the form, you must START THE CASE, the task will be sent to the next person in the acceptance queue.





Business Trips Form [1/2]

BUSINESS TRIPS_APPROVAL AND EXPENCES
PODRÓŻ SŁUŻBOWA_WNIOSEK I ROZLICZENIE

PAYBACK

Start
PODRÓŻ SŁUŻBOWA_WNIOSEK I ROZLICZENIE

Podróżujący

Imię i nazwisko podróżującego
Ewelina Smolińska

Grupa
-- wybierz --

Cel*

☐ Formularz PODRÓŻY służbowej

☐ Formularz ROZLICZENIA podróży

Dział*

-- wybierz --

Cost Center

Dodatkowi podróżni

+ Dodaj

Informacje o podróży

Miejsce docelowe podróży*

Data rozpoczęcia podróży służbowej*

dd-mm-yyyy

Data zakończenia podróży służbowej*

dd-mm-yyyy

Partner*

-- wybierz --

Cel podróży*

Wybór środka transportu

Podróż do*

☐ Samolot

☐ Kolej

☐ Samochód służbowy

☐ Brak

Podróż powrotna*

☐ Samolot

☐ Kolej

☐ Samochód służbowy

☐ Brak

Nocleg*

☐ Tak

☐ Nie

Estymowana liczba kilometrów (samochodem w obie strony)

Uwagi

Uwagi/Inne

If you are applying for permission to TRAVEL, select TRAVEL FORM, if you are reimbursing expences, select SETTLEMENT FORM.

Make sure you choose THE RIGHT DEPARTMENT, that is, the one you work in! If you are not sure, check in the Enova system



Depending on the field selection in this section, additional fields may appear.

After completing the form, YOU must START THE CASE, the task will be sent to the next person in the acceptance queue



Business Trips Form - Expenses [2|2]

Formularz ROZLICZENIA PODRÓŻY
PODRÓŻ SŁUŻBOWA, WNIOSEK I ROZLICZENIE

Do zrobienia Normalne Zwykłe

FORMULARZ ROZLICZENIA PODRÓŻY SŁUŻBOWEJ

Pracownik: Ewelina Smolińska Data: 5 sty 2023

Cel formularza - ROZLICZENIE*
☐ DO ROZLICZENIA
☐ BRAK KOSZTÓW

Rozliczenie za innego Pracownika

Numer konta

(wypełniamy tylko raz lub przy zmianie numeru konta)

Arkusz rozliczenia podróży służbowej

Wgraj plik

FAKTURY (paragony będą honorowane tylko w sytuacji braku możliwości uzyskania faktury)

Wgraj plik

BILET (lotniczy lub pociagowy)

Wgraj plik

AKCEPTACJE

Przełożony: -- wybierz -- Właściciel cost center: Anna Gos Controlling: Dawid Pyszowski

Informacje o podróży

Miejsce docelowe podróży: test Data rozpoczęcia podróży służbowej: 5 sty 2023 Data zakończenia podróży służbowej: 6 sty 2023

Partner: not partner related/general Cel podróży: test

Dodatkowi podróżni

If you REIMBURSE EXPENSES, select TO REIMBURSE, if there were no expenses, select NO COSTS to complete the proces.

The **business trips expenses form** is located here:
<https://toolbox.loyaltypartner.com/index.php?id=686>
HINT: when calculating per diems, travel start date = train/plane departure time, end date = landing/arrival in Warsaw/another city; do not combine currencies in the travel settlement sheet - one business trips expenses form is one currency

attachment of a ticket (plane/train) is mandatory - the ticket is a confirmation of the dates and times indicated on the business trips expenses form

It may turn out that during the acceptance process your expenses form will return to you in order to correct it (you will get an informational mail from Neula) along with a comment from the acceptor what should be changed.





Expenses Settlement Form [1|2]

ROZLICZENIA WYDATKÓW

PAYBACK

FORMULARZ
ROZLICZENIA WYDATKÓW

Nowe Normalne Zwykłe

FORMULARZ_ROZLICZENIE WYDATKÓW

Imię i Nazwisko
Ewelina Smolińska

Date
5 sty 2023

ROZLICZENIE PRACOWNIKA (wypełnić tylko, jeżeli rozliczenie robione jest w imieniu innej osoby):
[Empty field]

KARTA AMEX*
☐ TAK
☐ NIE

Numer konta
[Empty field]

(wypełniamy tylko raz lub zmianie numeru konta)

Business Unit*
-- wybierz --

Cost Center
[Empty field]

Kwota do wypłaty
[Empty field]

Cel*
-- wybierz --

Partner*
-- wybierz --

Wydatek*	Cost Center	Cost Unit	Konto	Item	Numer faktury*	Kwota*
-- wybierz --	[Empty]	[Empty]	[Empty]	[Empty]	[Empty]	[Empty]

Uczestnicy spotkania (proszę wymienić wszystkich uczestników z imienia i nazwiska)
[Empty field]

KOLEJNE WYDATKI

+ Dodaj

You can complete the form for another employee

When you select type of the EXPENSE, the CC, CU, Account, and Item fields will automatically be filled in.

In one form you can settle several expenses - the only condition is - the same currency for each expense.



Expenses Settlement Form [2|2]

AKCEPTACJE

Przełożony*

-- wybierz --

Właściciel Cost Center*

-- wybierz --

Controlling

Dawid Pyzowski

FAKTURY

FAKTURY (paragony będą honorowane tylko w sytuacji braku możliwości uzyskania faktury) *



 Wgraj plik

ROZPOCZNIJ SPRAWĘ

Depending on the category of expenditure, the **CC owners** are:

**ANNA MUSZYŃSKA-JURKOW
DARIUSZ SOJKA
DAWID PYZOWSKI
EWELINA SMOLIŃSKA
IWONA JEZNACH
PIOTR AWDZIEWICZ**

Each attached document should have our VAT numer.

After completing the form, you must **START THE CASE**, the task will be sent to the next person in the acceptance queue.



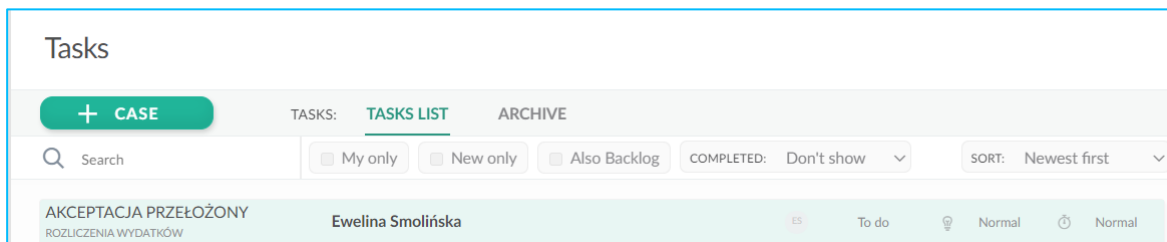
Tips for people accepting tasks in processes

You can go to **your** tasks either from your dashboard by clicking on a specific case in the TASK LIST or by clicking on a link from an email about a task waiting for you.

You must confirm with the ASSIGN TO ME button on the right side of the screen to **start** the task.

If **you do not accept the** task, the REMARKS | COMMENTS field is required.

Task completion - please confirm with the „SUBMIT | FINISH TASK" button (bottom of the form). The process will go to the next person in the acceptance queue.



(C5-116) CCC_ADMIN - Ewelina Smolińska

 [Makigami] CCC_ADMIN <bpm.no-reply@payback.pl>
To  Ewelina Smolinska



APPROVAL STEP 1 DIRECTOR

Please check one of the following:

- ☒ YES | Approved
☐ NO | Not approved

Remarks

SUBMIT TASK

How do I find out where my case is?

To search for your case:

1. Case number can be used, e.g. C3-42.
2. You can use a name or surname.
3. You can also use the available filters (process, date, specific filters).

To see who should be accepting your case at the moment :

4. Check marking on the CASE LIST (e.g. APPROVAL_STEP_1_DIRECTOR).

On slide 5, you'll find the complete list of people who accept tasks.



Browse Cases

Q Search cases

Processes

Q

All processes

Quick filters

I RAISED I WORKED ON

Specific filters

☐ Not Started Cases

☒ Active Cases

☐ Completed cases

☐ Terminated cases

Start date

ALL THIS MONTH THIS WEEK TODAY

Od: dd-mm-yyyy Do: dd-mm-yyyy

End date

ALL THIS MONTH THIS WEEK TODAY

Od: Do:

CASE LIST 33

C3-166
CCC_VENDORS - Grzegorz Leśniak
Started: 17 minutes ago APPROVAL_STEP_1_DIRECTOR

RWV2-291
ROZLICZENIA WYDATKÓW - Ewelina Smolińska
Started: 36 minutes ago AKCEPTACJA PRZEŁOŻONY

Z-65
Zamknięcie_Miesiąca_FINANSE
Started: 7 hours ago Zaksięguj rezerwy

TO-128
TLM_VENDOR ONBOARDING - Tomasz Wojno
Started: 5 days ago FEASIBILITY CHECK | GCO | FEASIBILITY CHECK | DATA PRIVACY

C1-230
CCC_NDA - Ewelina Smolińska
Started: 5 days ago CCC PRINT OUT

PS2-109
PODRÓŻ SŁUŻBOWA_WNIOSK I ROZLICZENIE - Zuzanna Smolarek-Wójcik
Started: 5 days ago Formularz ROZLICZENIA PODRÓŻY



How do I know what processes are on my to do list?

After you sign in, you'll get to your dashboard (example below)

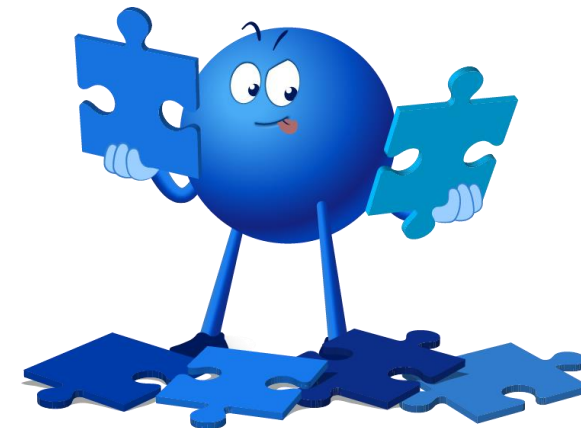
The screenshot shows the PAYBACK dashboard interface. On the left is a dark sidebar with navigation icons and labels: TASKS, APPLICATIONS, CALENDAR, MANAGER, SUPERVISOR, PROCESSES & APPLICATIONS, COMPONENTS, ORGANIZATION, SETTINGS, and ACCOUNT. The main area is titled 'Tasks' and contains a search bar (1), filter buttons for 'My only', 'New only', and 'Also Backlog', a 'COMPLETED' dropdown (2), a 'SORT' dropdown (3) with options like 'Newest first', 'Oldest first', 'By deadline', 'By importance', and 'By priority', a 'LAYOUT' dropdown (5) with options like 'List', 'Compact List', and 'Board', and a 'GROUP' dropdown. Below these is a task card for 'AKCEPTACJA PRZEŁOŻONY' by 'Ewelina Smolińska'. A bottom panel (4) shows a list of notifications. On the right, a 'Tasks: 1' summary section shows counts for 'APPLICATIONS', 'PERSONS', 'LABELS', and 'SYSTEM LABELS', along with a 'STATUS' list.

1. You can search for tasks (for example: after case number, e.g. C3-42, by name, after the name of the process).
2. You can filter them as you like (e.g. dates, implementation stage, status, criticality).
3. You also have a preview of your ARCHIVE.
4. Under ACCOUNT, you will find a complete list of all notifications sent to you.
5. You can change how your list is displayed.

Acceptance matrix

	Accounting	Admin	Analytics	Business Growth	Controlling	Digital Success	HR	IOD	IT	Legal	Marketing	MD	Operations	Success Partner	Tax
EXTERNAL/BUSINESS TRIPS_APPROVAL AND EXPENCES	X	X			X										
BUSINESS TRAVEL_APPLICATION AND SETTLEMENT	X	X			X										
EXPENDITURE ACCOUNTS	X	X			X										
CCC_ADMIN		X			X					X		X			
CCC_DEDICATED SERVICE SOW					X					X		X			
CCC_HR					X		X			X					
CCC_BOOK					X					X		X			X
CCC_NDA					X					X		X			
CCC_PARTNERS CUSTOMERS	X		X		X	X		X	X	X	X	X	X	X	X
CCC_ROAD					X			X		X					
CCC_VENDORS					X			X		X		X	X		X
WORK PHONE EXCHANGE REQUEST					X				X						
TLM_VENDOR ONBOARDING	X	X			X			X		X					
ONBOARDING		X							X						
ONBOARDING_EXTERNAL		X							X						
OFFBOARDING	X	X							X						
HUB_RECRUITMENT REQUEST					X		X		X						

Additionally in each process there is acceptance of the SUPERIOR role.



Thanks

SEE YOU

If you still have questions or doubts,
please contact Ewelina or Anna

