

# Yooz Rising training

Module 14:  
Using Yooz Rising through your mobile device

## ■ Objective of the training

- Provide to all the users of Yooz the necessary information to use Yooz Rising in full mobility.

## ■ Prerequisite

- None.

## ■ Targeted Audience

- This tutorial is for all the users of Yooz, named the Yoozers 😊

## ■ Duration

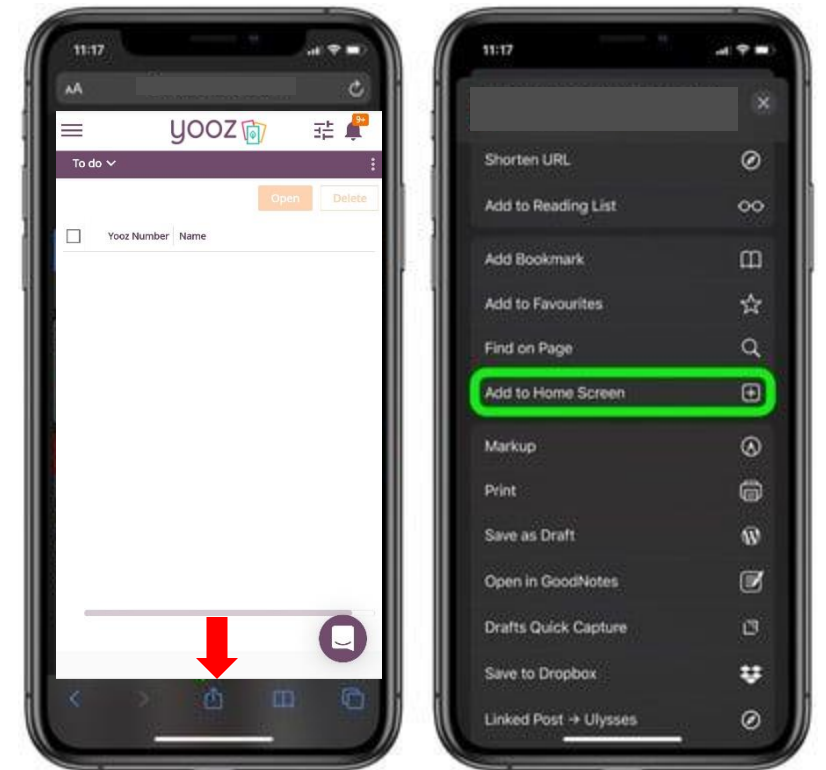
- 15 minutes.

- How to create a home screen icon
- How to navigate the Yooz Rising interface
- How to Approve, Reject, & Forward

# How to create a home screen icon

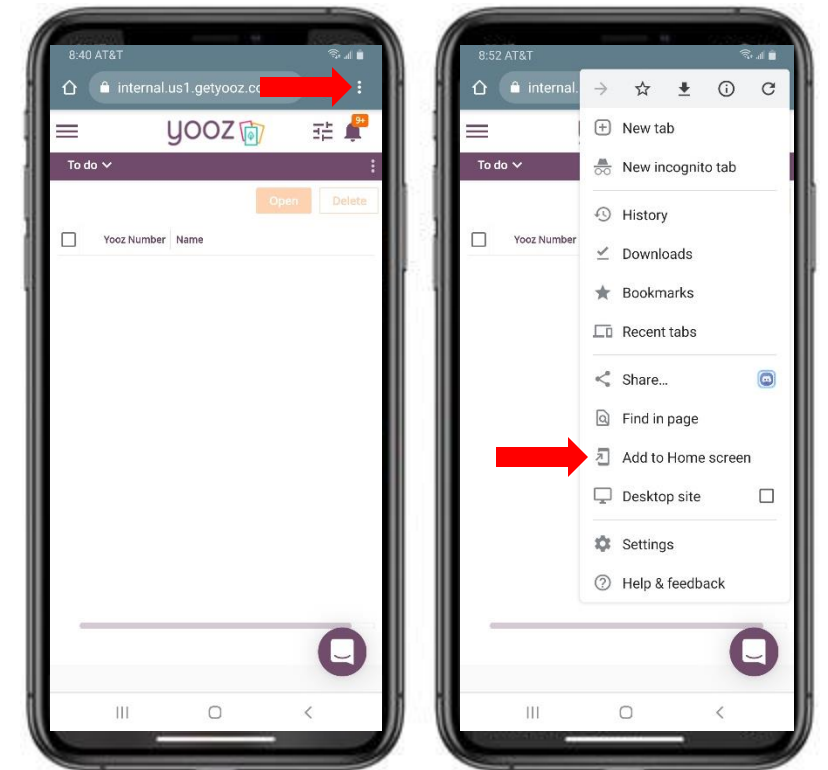
# Create a home screen icon (iPhone)

- Launch Safari on your iPhone or iPad.
- Navigate to the site (<https://us1.getyooz.com>) that you want to create a Home screen shortcut to.
- Tap the Share icon (the square with an arrow pointing out of it) at the bottom of the screen.
- Scroll down to the list of actions and tap Add to Home Screen. (If you don't see the action, scroll to the bottom and tap Edit Actions, then tap Add next to the Add to Home Screen action. After that, you'll be able to select it from the Share Sheet.)
- Type a name for your site link. This will be the title that appears beneath its icon on your Home screen.
- Tap Add in the top-right corner of the screen.



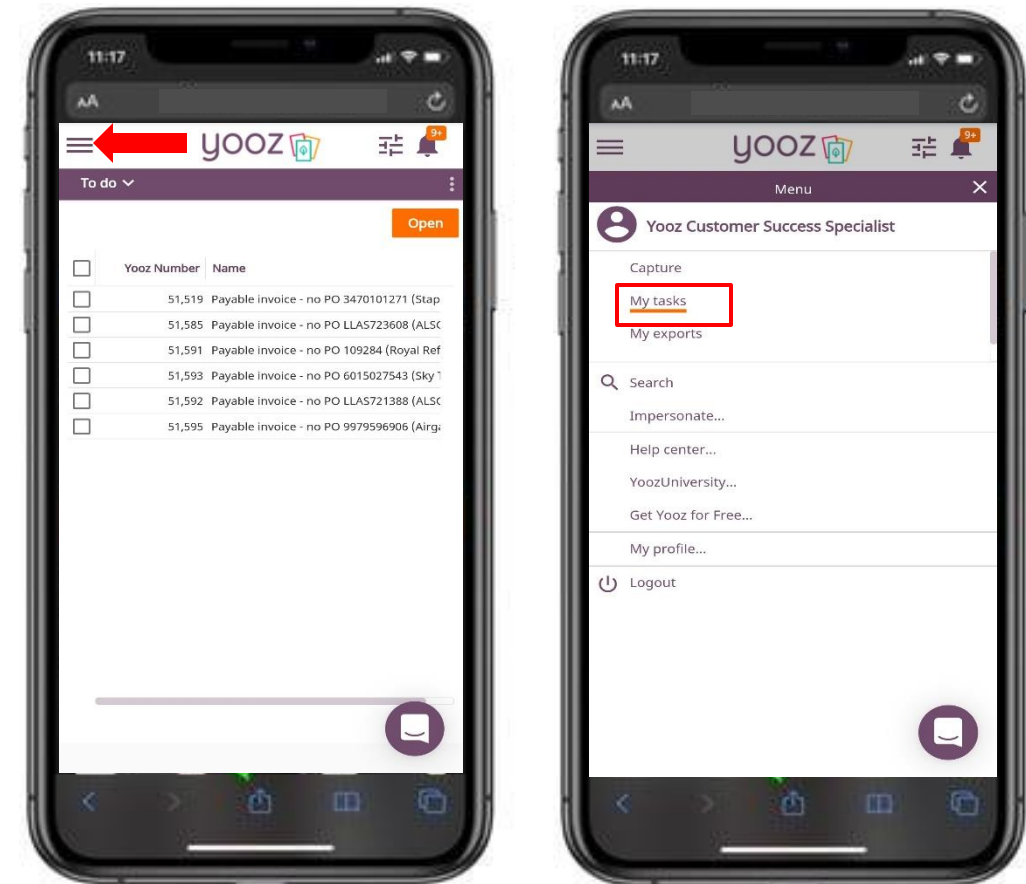
# Create a home screen icon (Chrome)

- Launch “Chrome” app.
- Open the website or web page you want to pin to your home screen (<https://us1.getyooz.com>).
- Tap the menu icon (3 dots in upper right-hand corner) and tap Add to home screen.
- You’ll be able to enter a name for the shortcut and then Chrome will add it to your home screen.



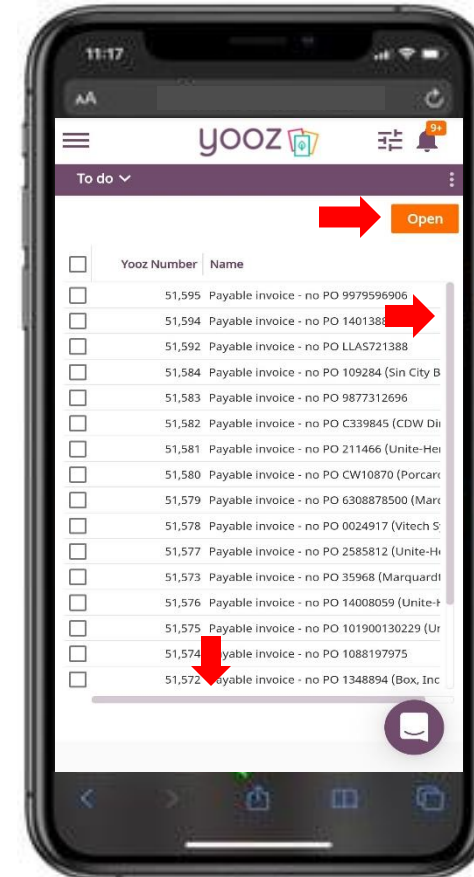
# How to navigate the Yooz Rising interface

- Click the three horizontal lines in the top left corner to access the Main Menu.
- Click on My Tasks to access your queue in the Yooz application.

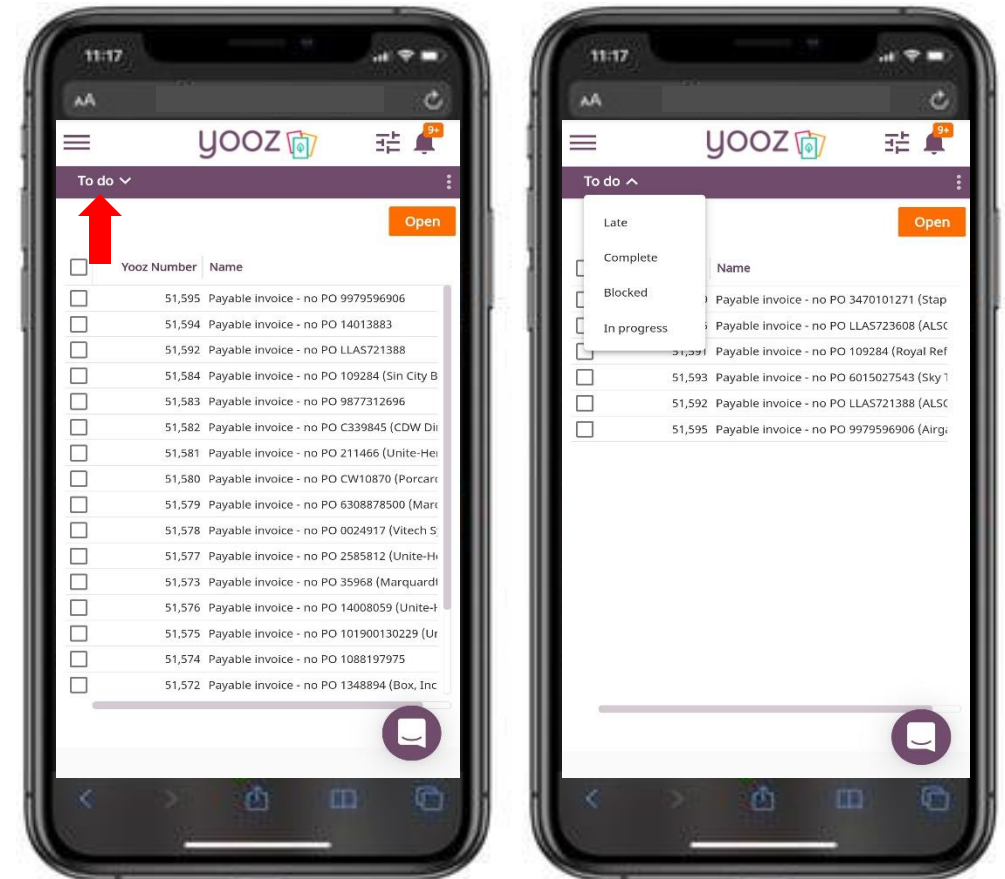




- To scroll through the documents in the My Tasks queue:
  - Click & Drag the slider bars to scroll up/down or left/right.
- To open an invoice:
  - Click on the line containing the invoice you want to open,
  - Alternatively, you can click Open in the top right-hand corner of the invoice list to open the entire queue.

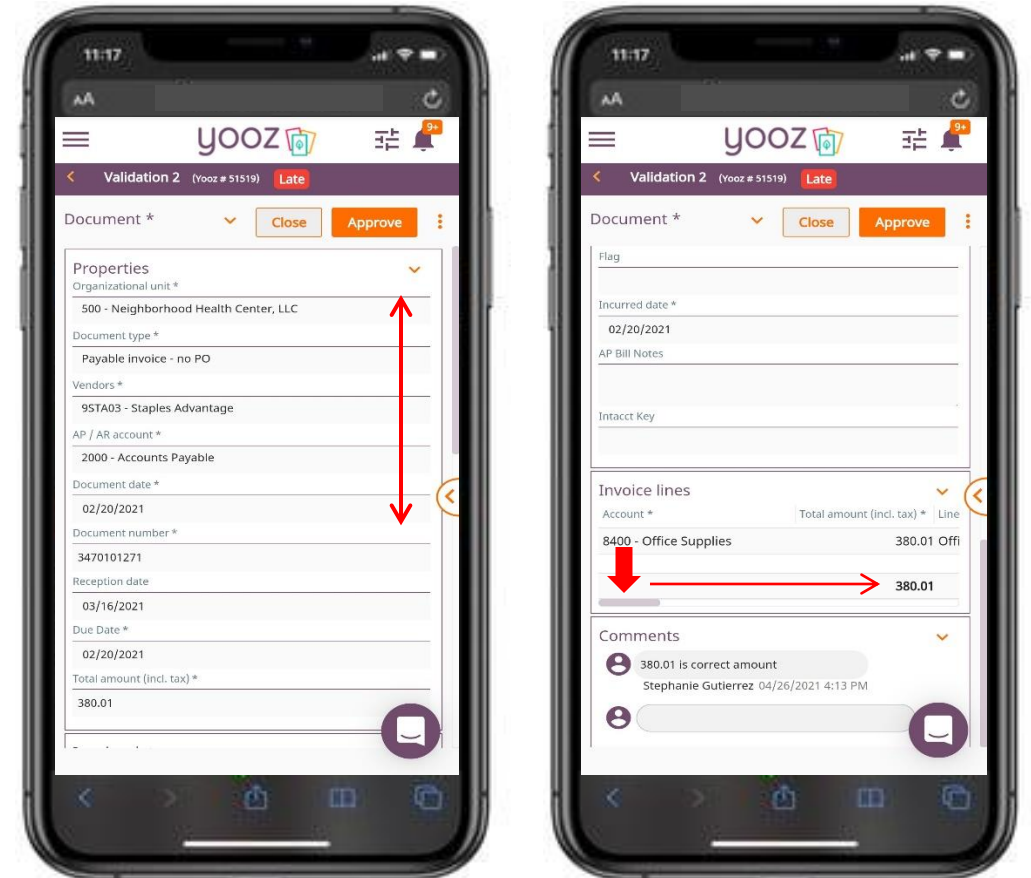


- To access the Late or In Progress components use the Component drop-down (Top Left)
  - To Do Component – Documents in the user's queue for processing
    - Shows all documents in a user's queue
  - Late Component – Documents in the user's queue that are late for processing
    - Only shows documents marked as late
  - In Progress Component – Documents that a user has processed to a new task (step) in the application



# Navigate the Invoice Review Form (1/2)

- Press and drag on the invoice form to scroll up and down.
- Press and drag the slider bar below the invoice lines to scroll left/right.



The image displays two smartphone screens showing the Yooz Invoice Review Form. The left screen shows the 'Properties' section, which includes fields for Organizational unit, Document type, Vendors, AP / AR account, Document date, Document number, Reception date, Due Date, and Total amount. A red double-headed vertical arrow is positioned next to the 'Properties' section, indicating that the form can be scrolled vertically. The right screen shows the 'Invoice lines' section, which includes a table with columns for Account, Total amount (incl. tax), and Line. A red double-headed horizontal arrow is positioned below the 'Invoice lines' section, indicating that the table can be scrolled horizontally. Both screens also show a 'Comments' section at the bottom.

**Properties**

Field	Value
Organizational unit *	500 - Neighborhood Health Center, LLC
Document type *	Payable invoice - no PO
Vendors *	95TA03 - Staples Advantage
AP / AR account *	2000 - Accounts Payable
Document date *	02/20/2021
Document number *	3470101271
Reception date	03/16/2021
Due Date *	02/20/2021
Total amount (incl. tax) *	380.01

**Invoice lines**

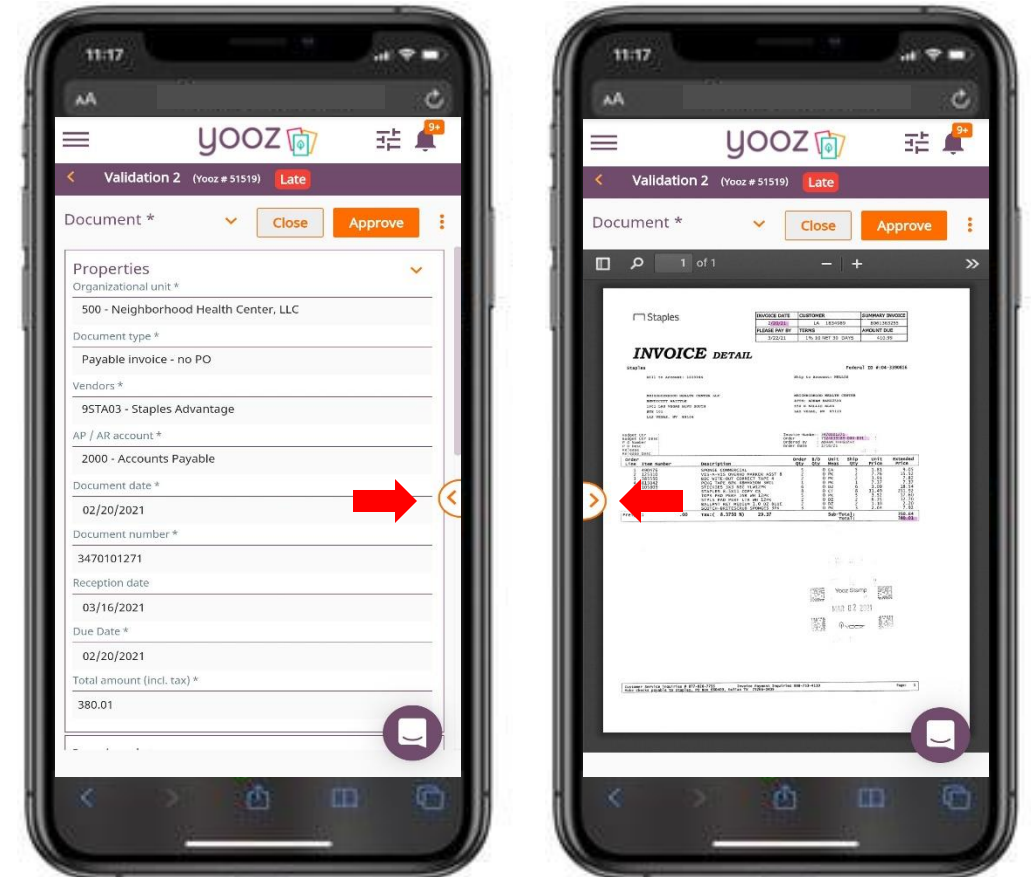
Account *	Total amount (incl. tax) *	Line
8400 - Office Supplies	380.01	Offi

**Comments**

- 380.01 is correct amount  
Stephanie Gutierrez 04/26/2021 4:13 PM

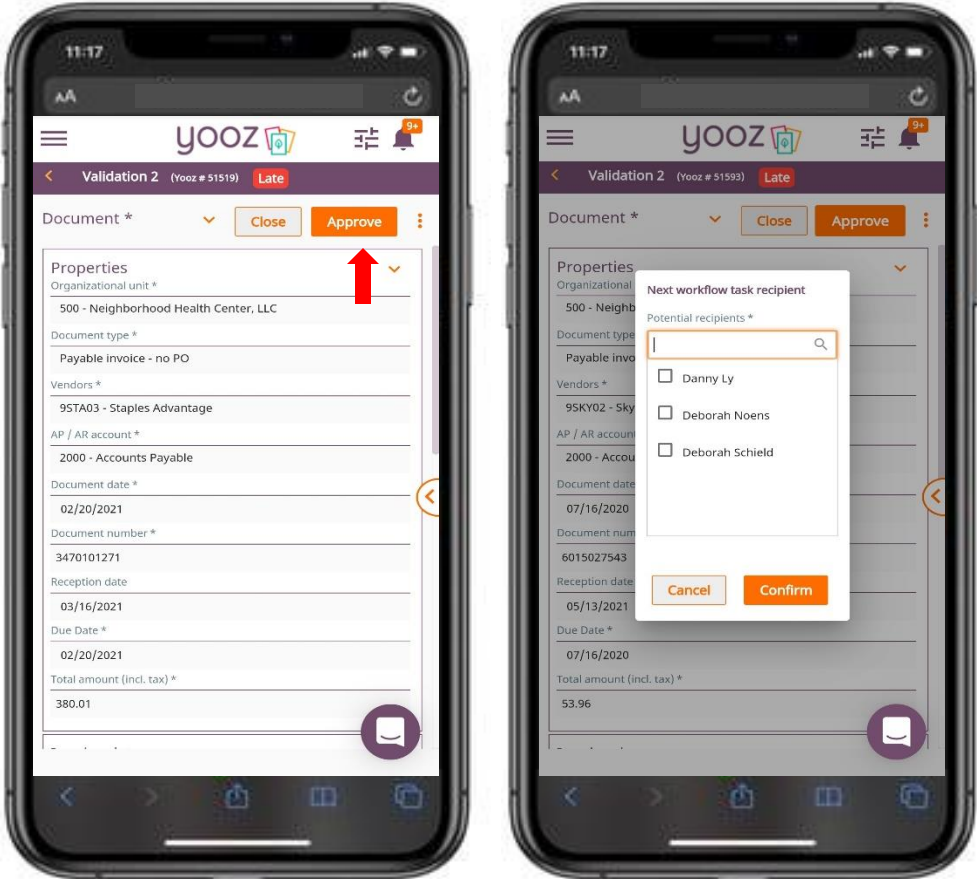
# Navigate the Invoice Review Form (2/2)

- Press the Arrow (Middle Right) or swipe to the left to view the document image
- Press the Arrow again (Middle Left) or swipe to the right to return to the invoice data

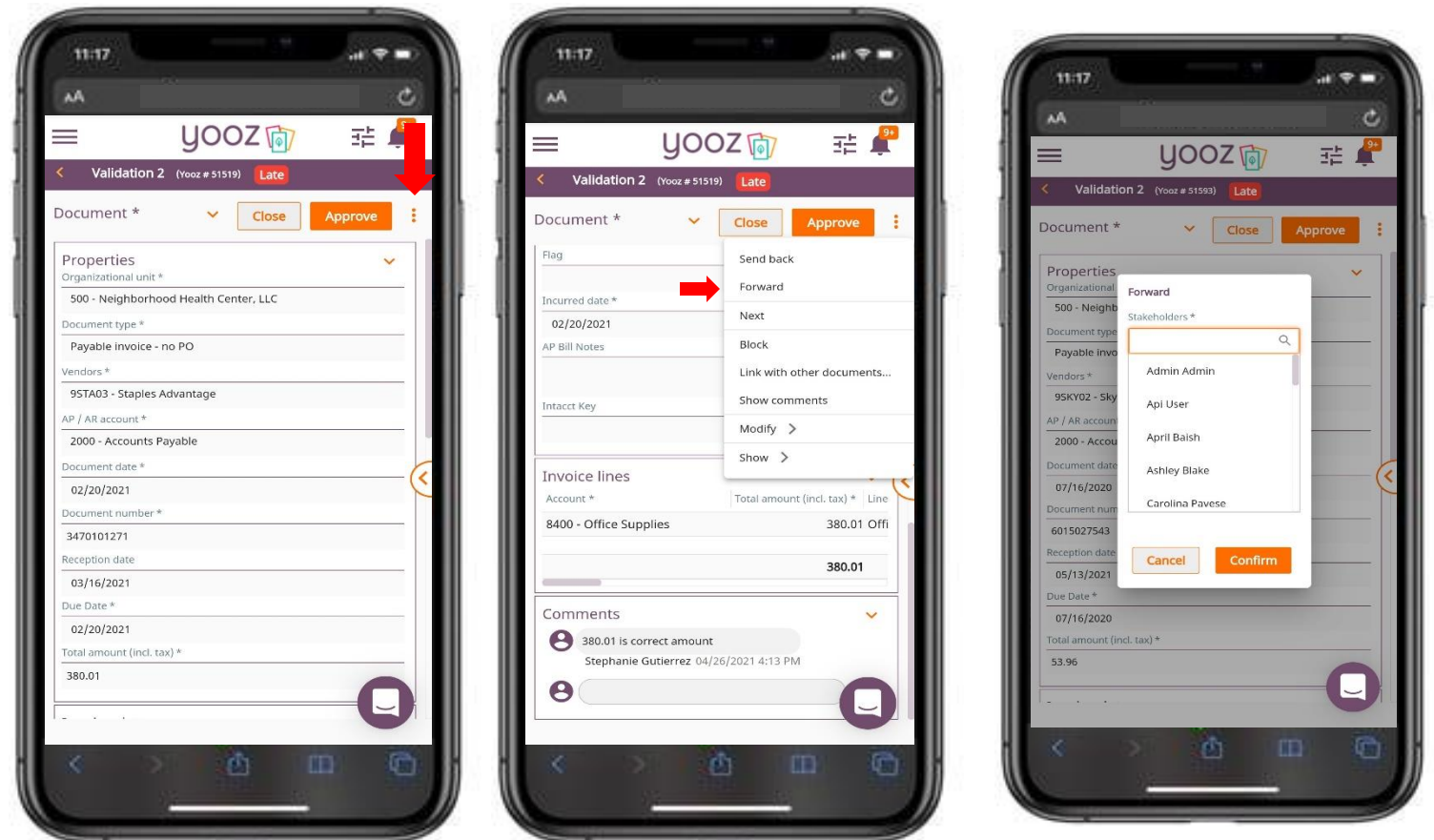


# How to Approve, Reject, & Forward

- Press the Approve button to Approve an invoice.
- For each scenario:
  - If there is only one available approver, press Confirm.
  - Otherwise:
    - Select the individual to send the document to in the next Task (step),
    - Then press Confirm.

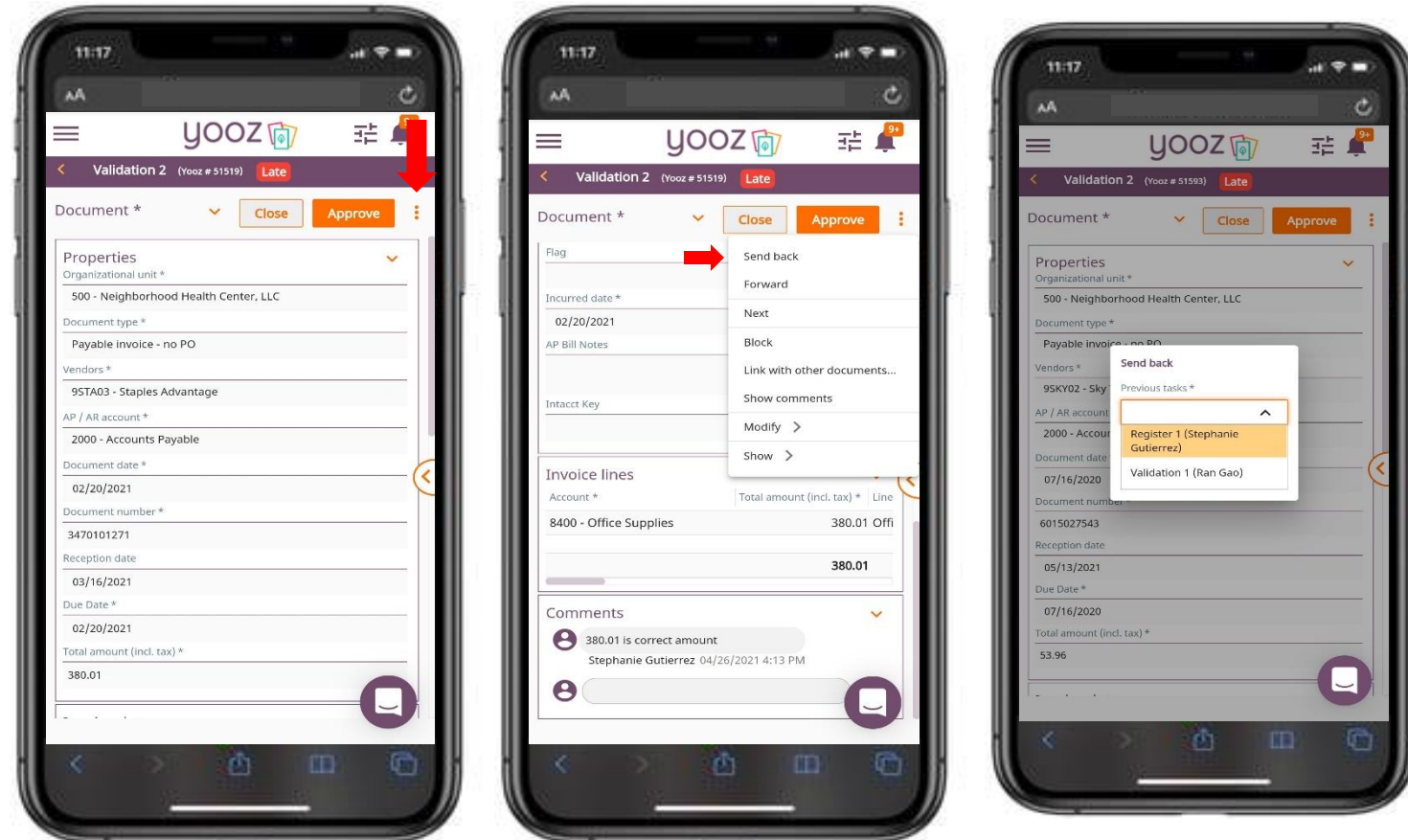


- Press the vertical three dots to open the action menu (Top Right),
- Press Forward,
- Select the individual you would like to Forward the document to,
- Click Confirm.





- Press the vertical three dots to open the action menu (Top Right),
- Press Send Back,
- Select the Task/individual you would like to Reject (Send Back) the document to,
- Click Confirm.





# Questions / Answers