

# Yooz Rising training – Business Edition

Module x:  
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 😊

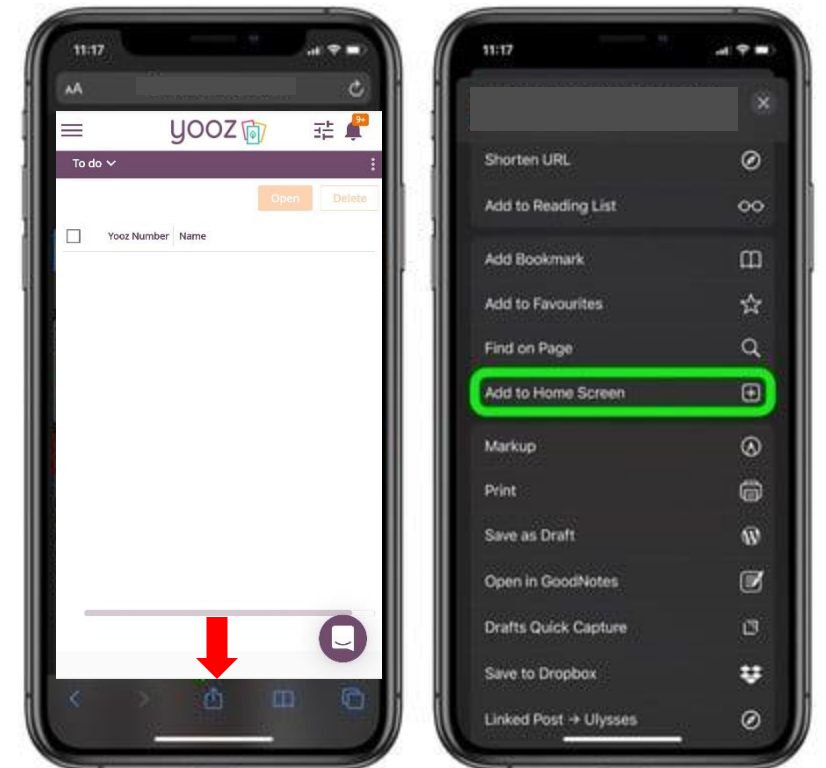
## ■ Duration

- 15 minutes.

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

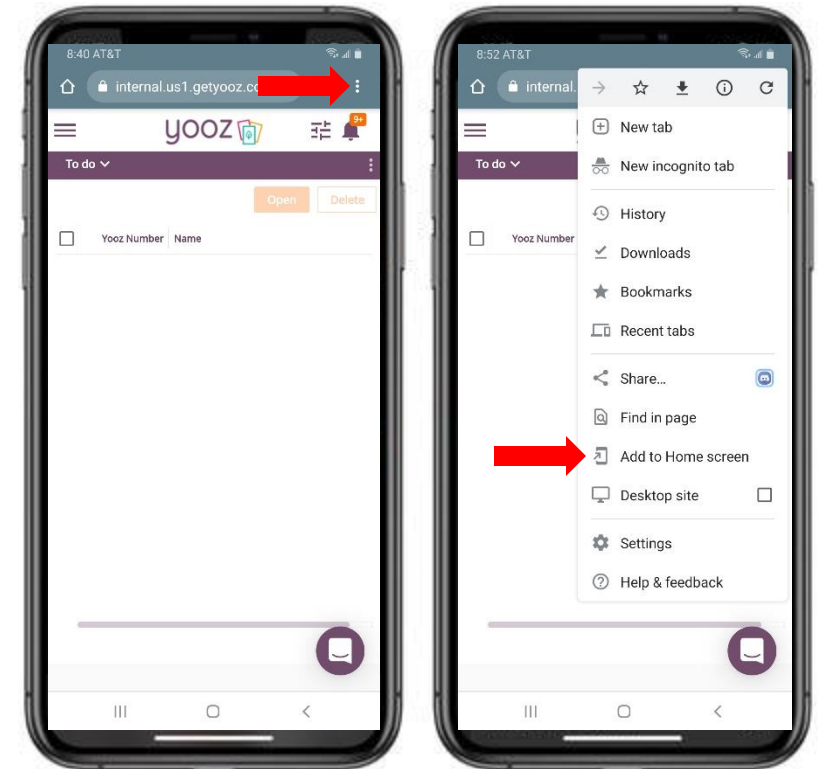
# How to create a home screen icon

- 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.



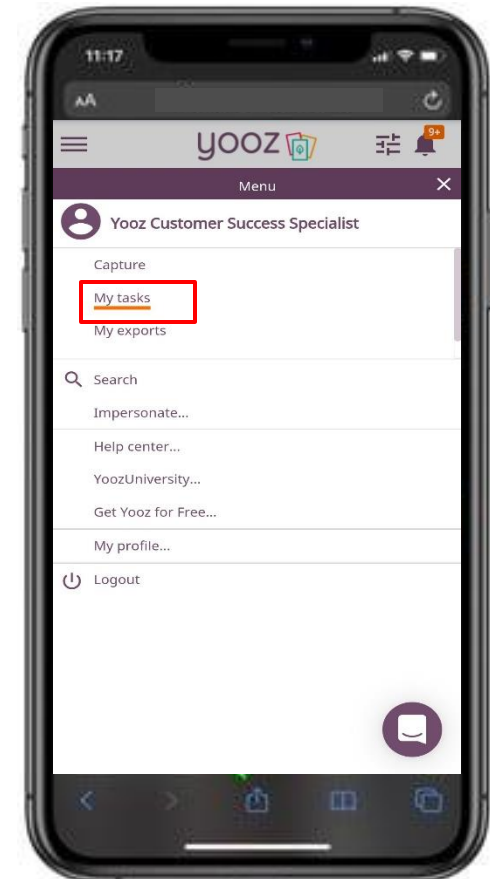
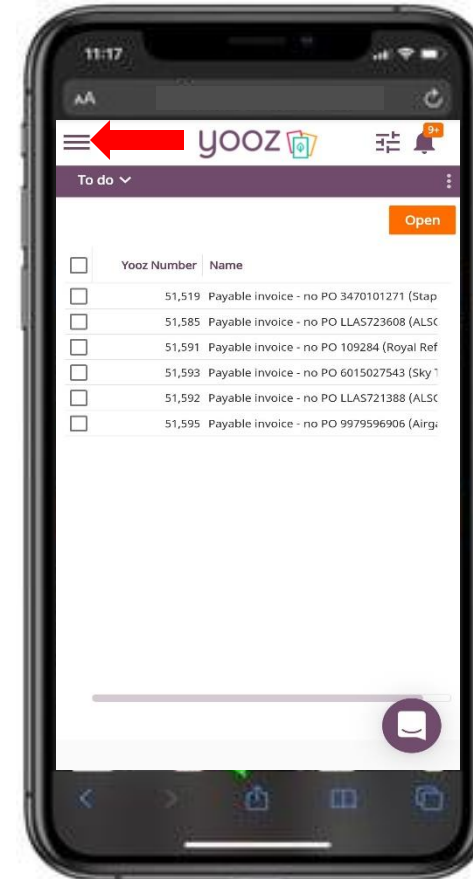
# Create a home screen icon (Chrome)

- 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.



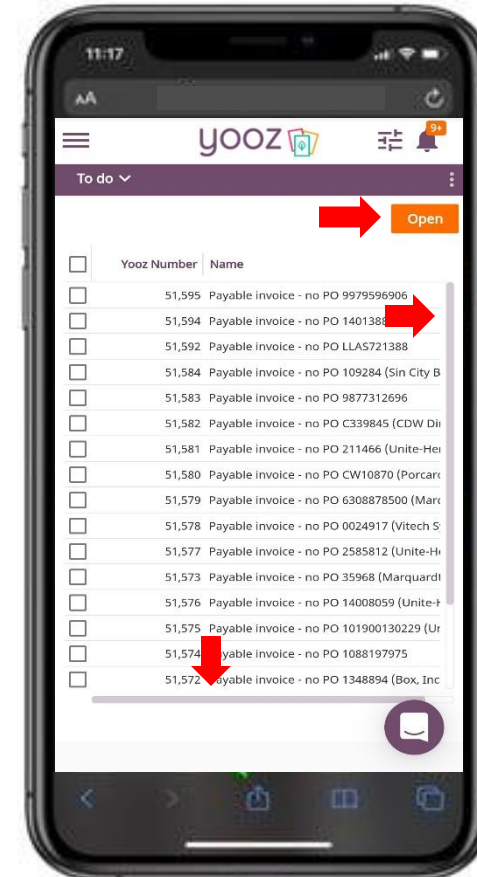
# How to navigate the Yooz Rising interface

- 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)

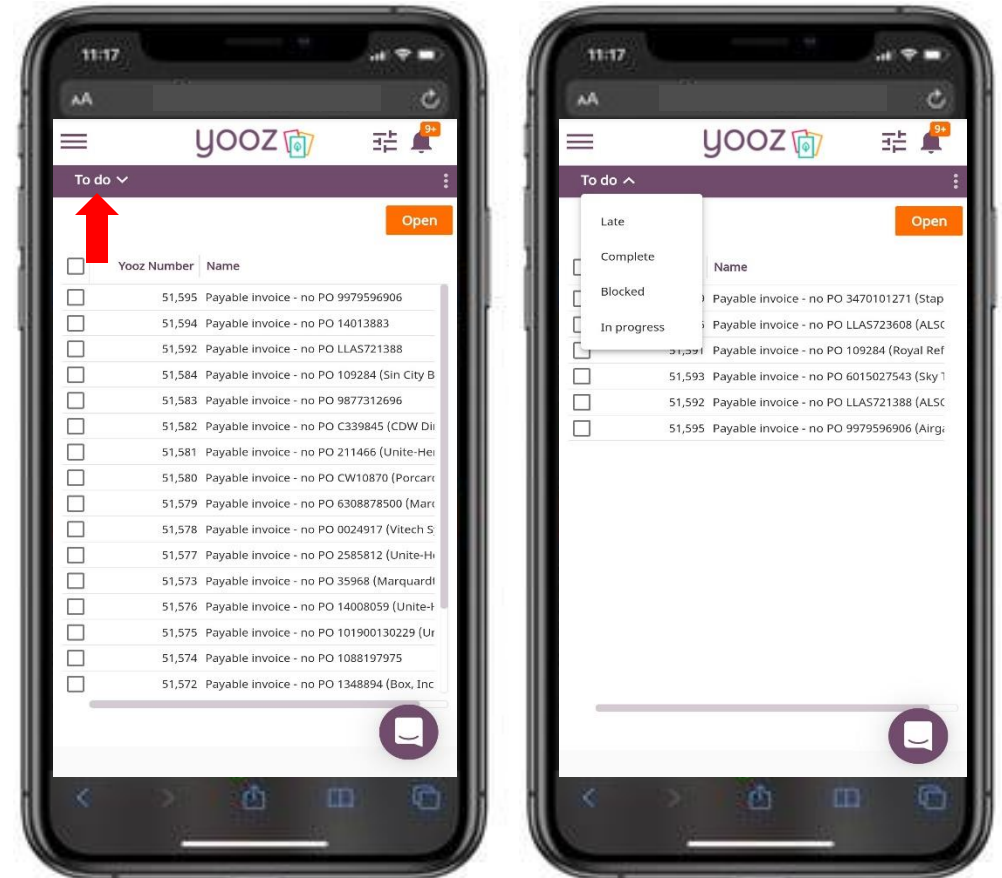
■ To Do Component – Documents in the user’s queue for processing

■ Shows all documents in a user’s queue

■ Late Component – Documents in the user’s queue that are late for processing

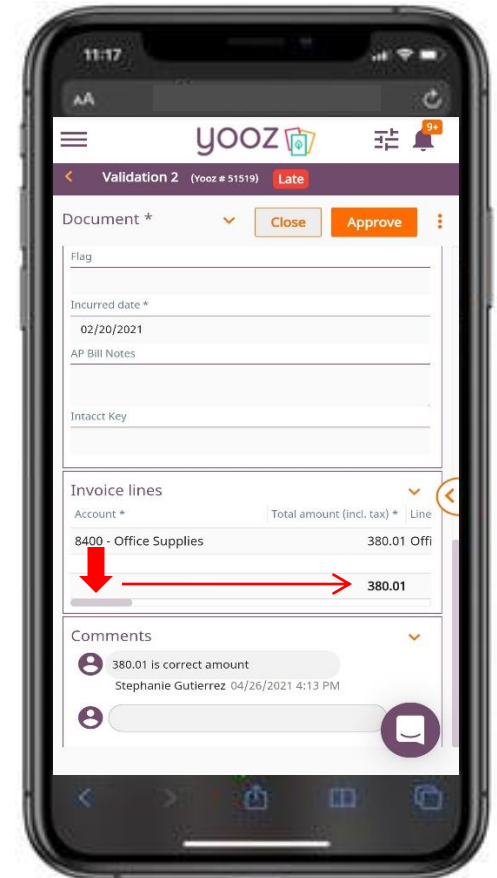
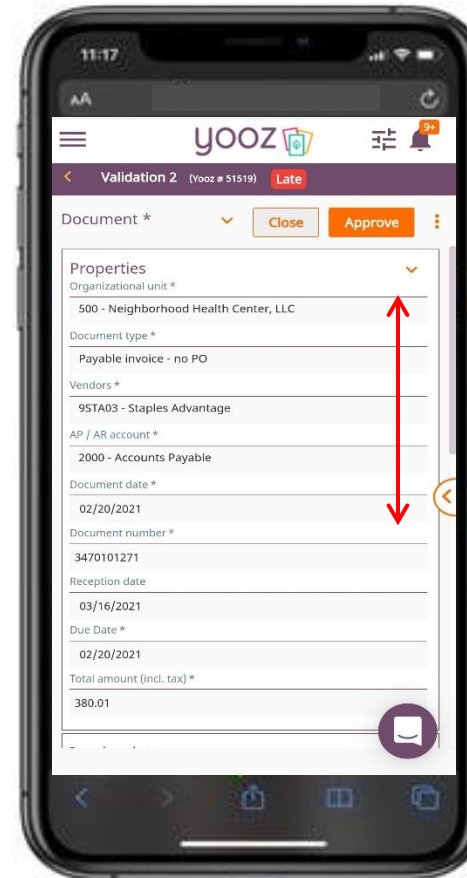
■ Only shows documents marked as late

■ In Progress Component – Documents that a user has processed to a new task (step) in the application



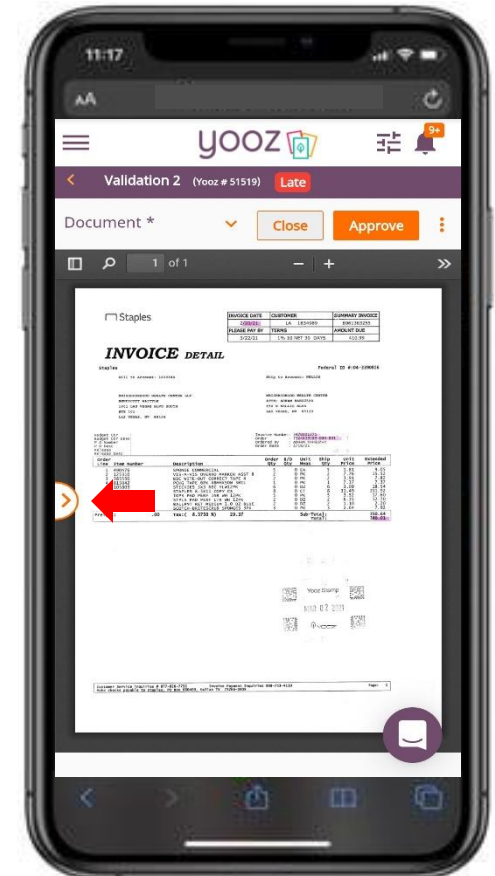
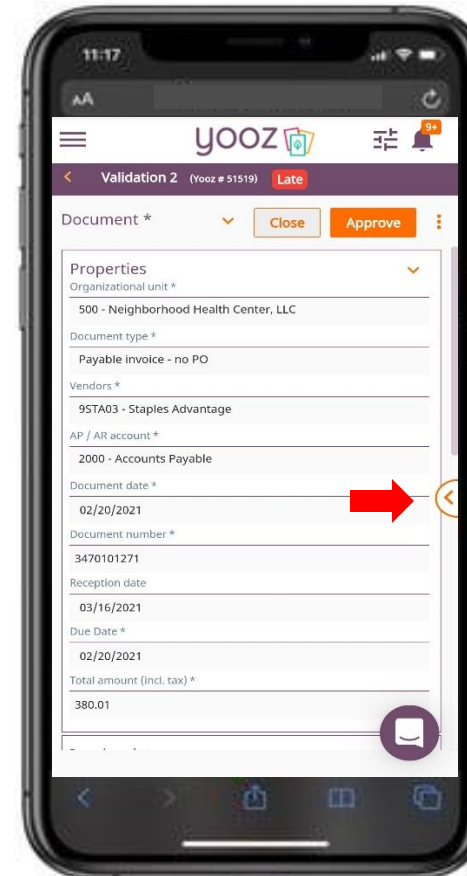
# Navigate the Invoice Review Form (1/2)

- 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.



# 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

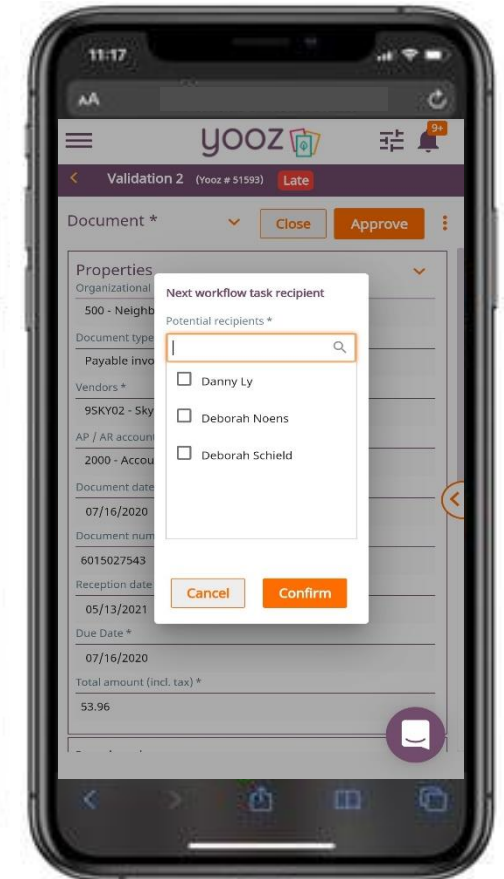
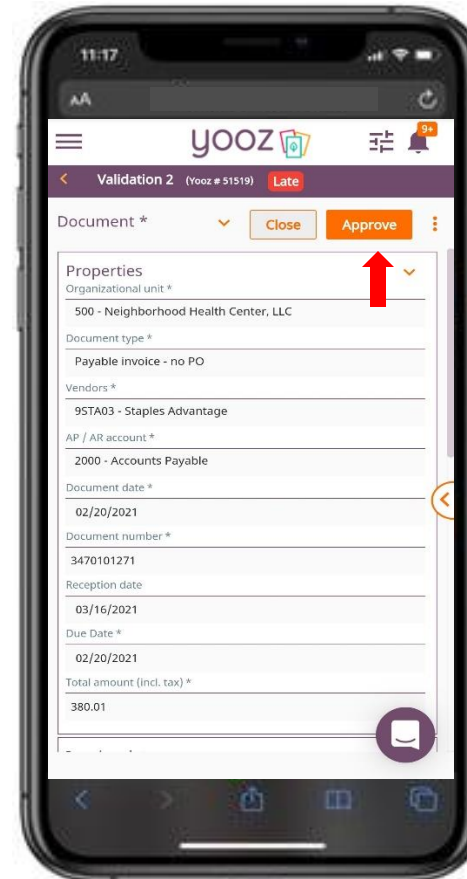




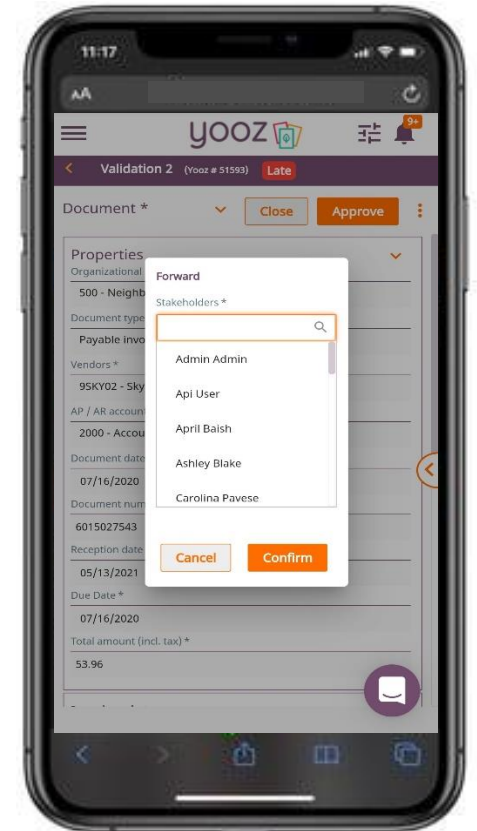
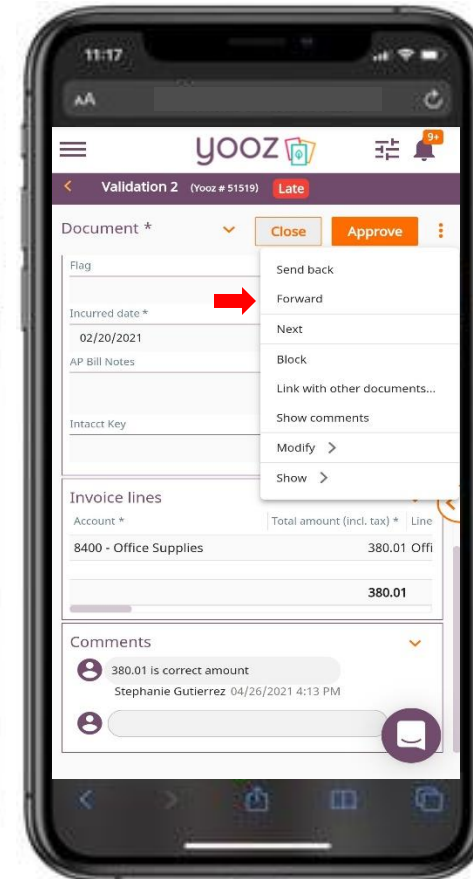
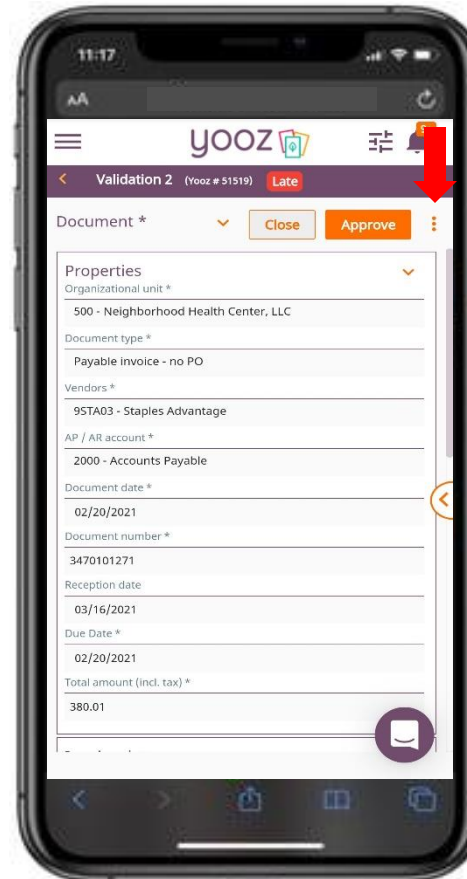
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# How to Approve, Reject, & Forward

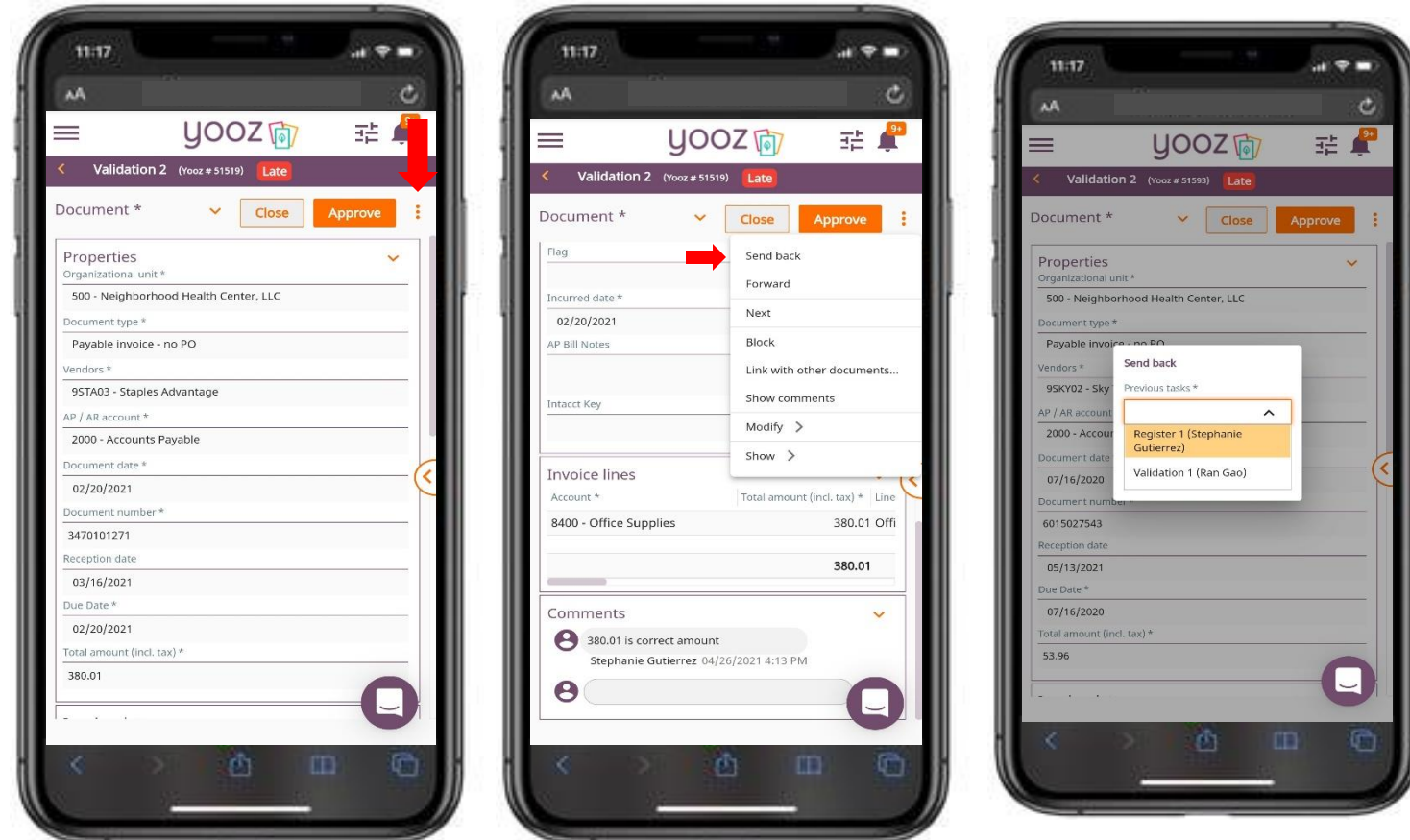
- Press the Approve button to Approve an invoice.
- For each scenario:
  - If there is only one available approver, press Confirm.
  - Otherwise:
    - Select the individual to send the document to in the next Task (step),
    - Then press Confirm.



- 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