

Yooz Rising training – Business Edition

Module x: Using Yooz Rising through your mobile device





Objective and duration of the training

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.



Training plan

- 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





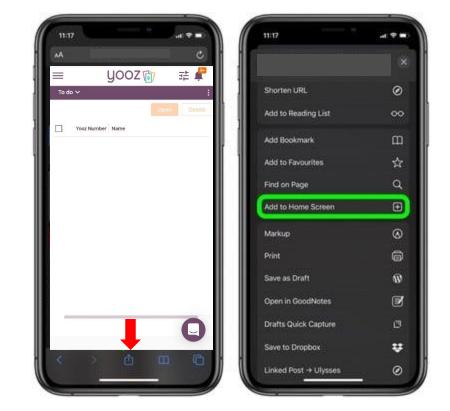
Create a home screen icon (IPhone)

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.

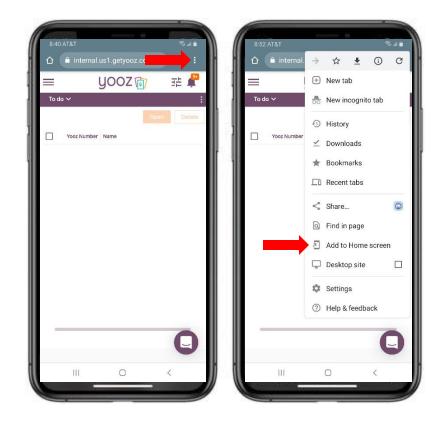




Create a home screen icon (Chrome)

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.



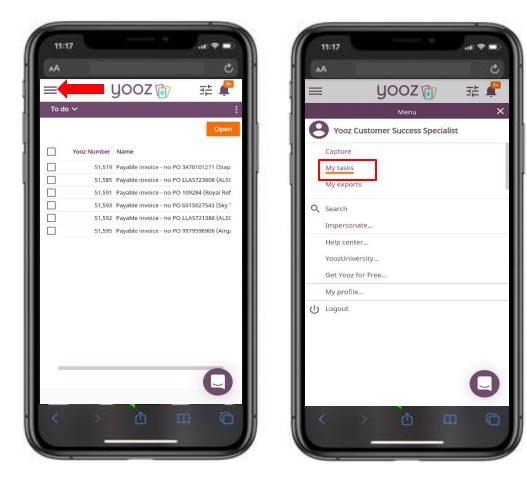


How to navigate the Yooz Rising interface



Access Main Menu & My Tasks

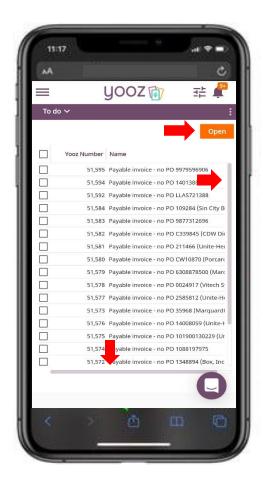
- Click the three horizontal lines in the top left corner to access the Main Menu.
- Click on My Tasks to access your queue in the Yooz application.





Navigate My Tasks Workspace (1/2)

- 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.



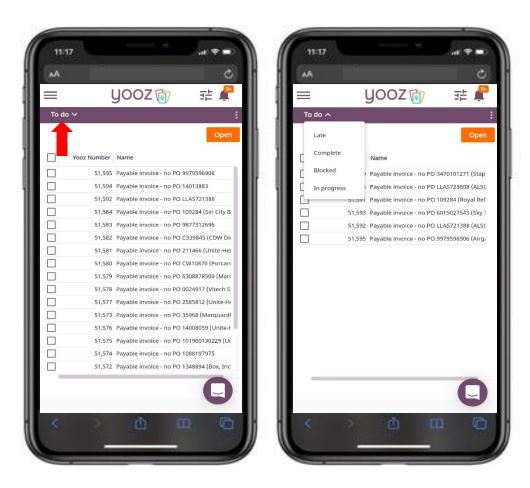


Navigate My Tasks Workspace (2/2)

- 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

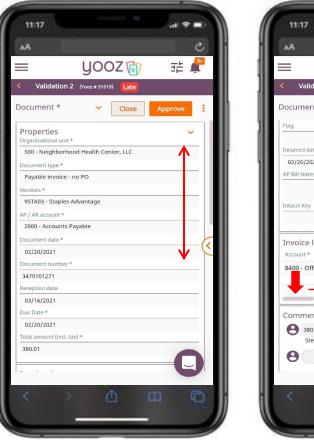
- Late Component Documents in the user's queue that are late for processing
 - Only shows documents marked as late
- In Progress Component Documents that a user has processed to a new task (step) in the application

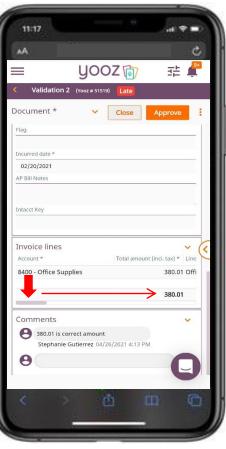




Navigate the Invoice Review Form (1/2)

- 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.

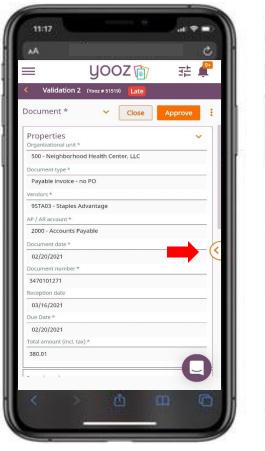






Navigate the Invoice Review Form (2/2)

- 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







How to Approve, Reject, & Forward



How to Approve

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.



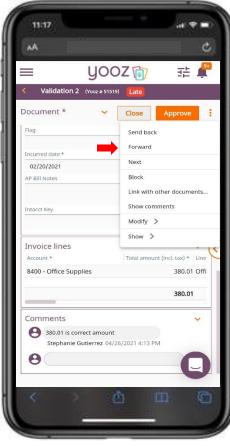


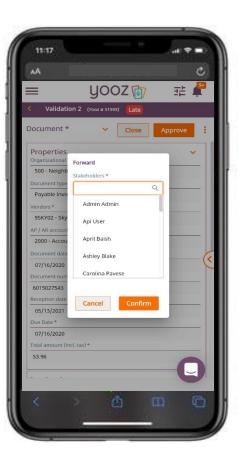
How to Forward

- 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.

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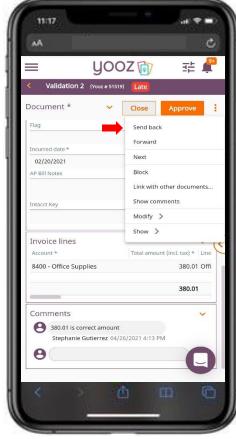


How to Reject

- 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.

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Questions / Answers

