



# hh2 User Guide

## Document Flow Mobile App

For the Field User

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# Document Flow Capabilities and Benefits

The Document Flow Module assists with:

- ❑ **Effortless Invoice Management:** Enables photo capture and invoice uploads from the construction site.
- ❑ **Empower Selective Approval:** Eliminates errors by accepting only valid invoices.
- ❑ **Fast Submission for Reimbursement:** Convenient and easy submission of credit card and non-credit card reimbursements from the construction site.
- ❑ **Swift Data Entry with OCR:** Utilizes advanced Optical Character Recognition (OCR) technology for rapid and accurate data acquisition, saving time and reducing manual effort.
- ❑ **Enhanced Organization:** Code invoices precisely to the appropriate Jobs, Cost Codes, Categories and Cost Types to ensure accurate financial tracking.
- ❑ **Flexible Distribution Handling:** Easily distribute costs from a single invoice to different Commitments, Cost Codes, Categories and Cost Types, providing flexibility and accuracy in financial distribution.
- ❑ **Simplified Approval Workflow:** Route Invoices down custom workflows for hassle-free approval or rejection, ensuring efficient decision-making.

The Document Flow Module streamlines the invoice management process to enhance overall financial accuracy, control, ease, and efficiency. Let's get started!

## Users that will Benefit from this User Guide

- ☐ Field Employee
- ☐ Field Supervisor
- ☐ Foreman
- ☐ Superintendent
- ☐ Project Manager
- ☐ Crew Manager
- ☐ Other managerial roles in the field
- ☐ AP Managers and Administrators who want to understand how Document Flow looks in the field.

**Note:** A Glossary of Terms is available for in the Manager User Guides. It includes hh2 terminology for all product areas and some general industry language. See your Administrator for a list of terms.

**Note:** This User Guide is intended to be used alongside the software for maximum comprehension.

## Document Flow Quick Start Guide

1. Search for hh2 Document Flow app in the Apple Store or Google Play Store and download it.
2. Log in.
3. Run a synchronization.
4. Capture a photo of your invoice or receipt.
5. Upload the invoice or receipt. Invoices will now reside in the Invoice Queue. This includes receipts paid with a company credit card and reimbursements for expenses paid with other method, such as cash or a personally owned credit card. From here forth, all images/documents/invoices/receipts will be referred to as Invoices.
6. From the Invoice Queue, the Invoice will be coded and approved. Invoices may also be placed on hold in the On-Hold Queue for further coding consideration in the case where the coding is incorrect, or an image is missing.
7. From the Invoice Queue, the user may need to approve the invoice, based on the construction company's set up.
8. Once approved by the user, the invoice will then automatically continue to "move" through the Workflow List for approval. Ultimately, the AP Manager will receive it, approve it, and send it through the accounting system for payment.

## Guía de Inicio Rápido del Flujo de Documentos en Español

1. Busca la aplicación hh2 Document Flow en la App Store de Apple o en Google Play Store y descárgala.
2. Inicia sesión.
3. Realiza una sincronización.
4. Captura una foto de tu factura o recibo.
5. Sube la factura o recibo. Las facturas ahora residirán en la Cola de Facturas. Esto incluye recibos pagados con una tarjeta de crédito de la empresa y reembolsos por gastos pagados con otro método, como efectivo o una tarjeta de crédito personal. De aquí en adelante, todas las imágenes/documentos/facturas/recibos se denominarán Facturas.
6. Desde la Cola de Facturas, la factura será codificada y aprobada. Las facturas también pueden ser colocadas en espera en la Cola en Espera para una consideración de codificación adicional en caso de que la codificación sea incorrecta o falte una imagen.
7. Desde la Cola de Facturas, el usuario puede necesitar aprobar la factura, según la configuración de la empresa de construcción.
8. Una vez aprobada por el usuario, la factura continuará automáticamente "moviéndose" a través de la Lista de Flujo de Trabajo para su aprobación. En última instancia, el Gerente de AP la recibirá, la aprobará y la enviará a través del sistema contable para su pago.

# The Document Flow Mobile Application Process



The Document Flow module feature must be enabled.

1. Download the hh2 Document Flow mobile app (one-time event).
2. Log In.
3. Perform a synchronization.



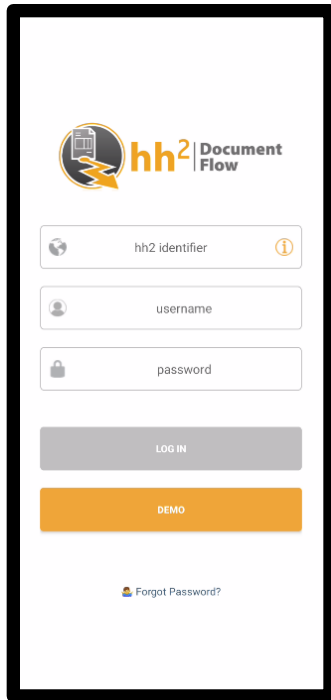
## Download the Mobile Application

Download the hh2 Document Flow Mobile from the Apple Store for iOS, iPhones, and iPads. For Android products download the hh2 Document Flow Mobile from the Google Play Store.

### **To Download:**

1. Search for hh2 Document Flow.
2. Select it.
3. Install.
4. Open the application once the installation process is complete.
5. Log In using the hh2 credentials provided by your Administrator.

## To Log In

A screenshot of the hh2 Document Flow login interface. At the top is the hh2 Document Flow logo. Below it are three input fields: 'hh2 identifier' with a globe icon and an information icon, 'username' with a person icon, and 'password' with a lock icon. Below these fields are two buttons: a grey 'LOG IN' button and an orange 'DEMO' button. At the bottom is a link that says 'Forgot Password?' with a key icon.

### To Log In:

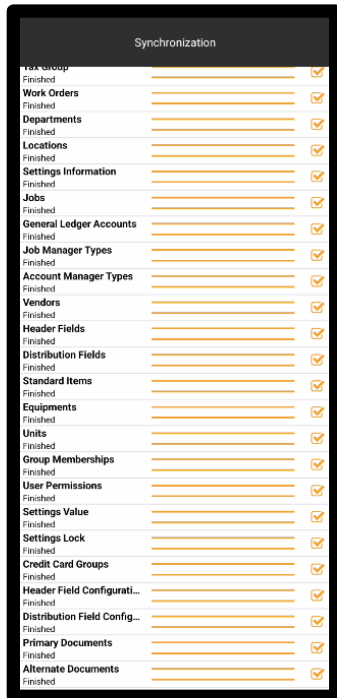
1. Enter the construction company's hh2 account (company identifier). For instance, if the company's identifier is construction.hh2.com, the user would enter construction.
2. Enter the Username.
3. Enter the Password.
4. Select Log In.
5. If there is an error, the system will flag the user that either the identifier, username or password is incorrect. **Note:** If the user has forgotten their password, simply click Forgot Password. The user will need to know the account name and email address associated with the account to reset the password.

## Synchronization

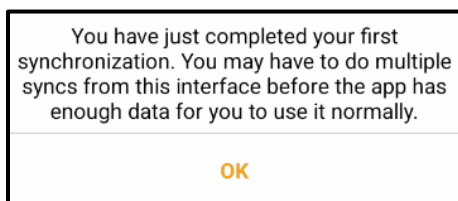
Upon log in, the mobile application will automatically synchronize all the company's and user data (such as jobs, and vendors), along with permissions to access specific areas of the hh2 software. This will occur upon each log in to the hh2 mobile application.

### To Complete Synchronization:

1. Once the synchronization is complete, all boxes will be checked.



2. Select Done once all boxes are checked. The following message will display after the first synchronization:

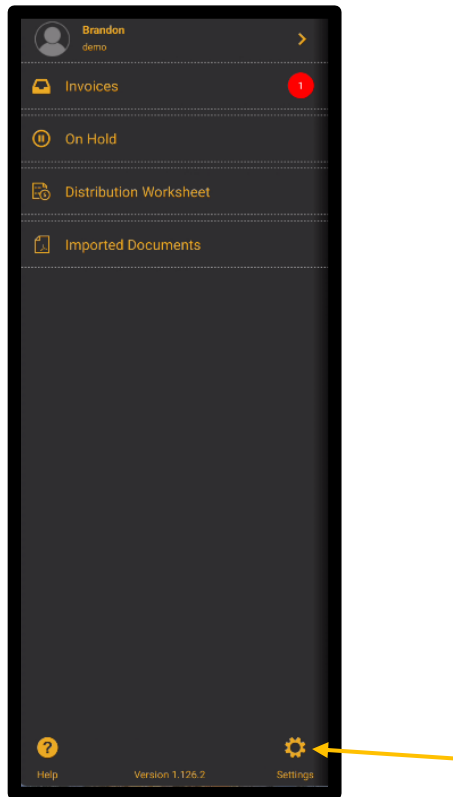


3. Subsequent synchronizations will display a message that the synchronization has completed. For either, select Ok.

**Note:** Occasionally, more than one synchronization is required. When changes are made on the hh2 website, the Field user will not see those changes until a synchronization has occurred.

## Tools on the Document Flow Home Page

A variety of tools at the bottom of the Document Flow Home Page are available to the user. These tools are the same for the end field user as well as the supervisor or manager in the field.




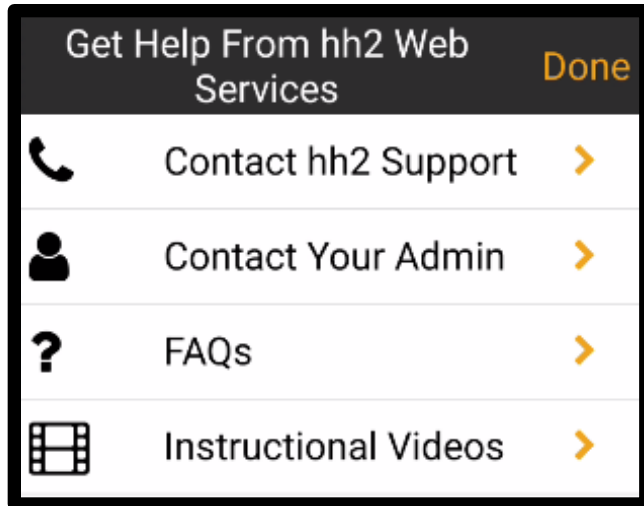
The tools allow the user to:

- Obtain help
- Determine the hh2 version of the mobile application
- Access system settings (if permitted to do so)


**Note:** Throughout the mobile application, the title of the page is often indicated in white, while functions are indicated in color.

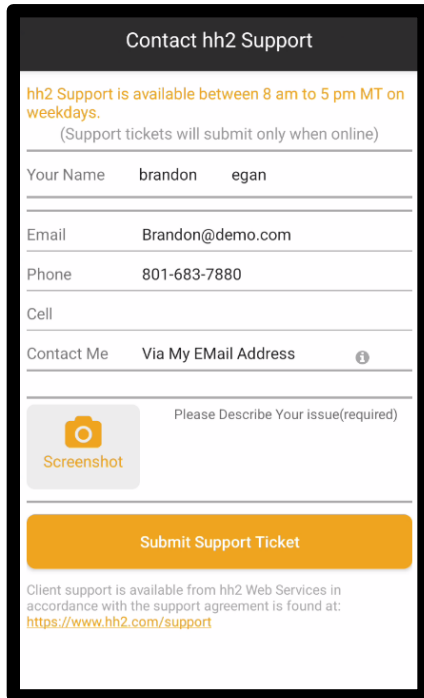
## The Help Tool

The Help  icon in the bottom left corner of the application provides the user access to hh2 Support, the user's construction company hh2 administrator, FAQs, and Instructional Videos. **Note:** The Help Tool is available on most pages throughout the Document Flow mobile application.



## To Contact hh2 Support:

1. Select the Help  icon.



Contact hh2 Support

hh2 Support is available between 8 am to 5 pm MT on weekdays.  
(Support tickets will submit only when online)


Your Name    brandon    egan

Email        Brandon@demo.com

Phone        801-683-7880

Cell

Contact Me    Via My EMail Address    ⓘ

 Please Describe Your issue(required)


Screenshot

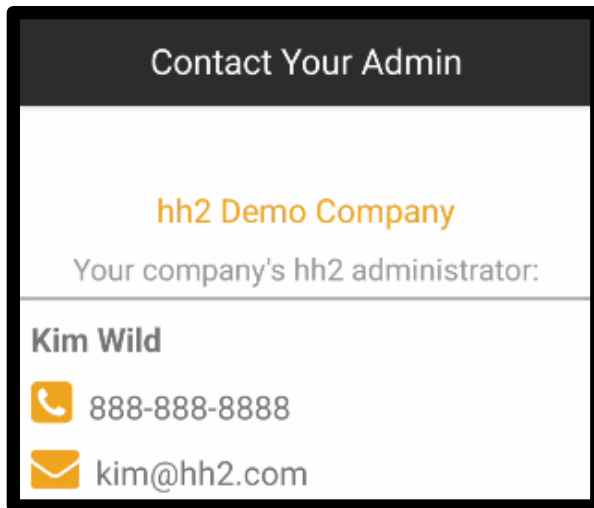
Submit Support Ticket



Client support is available from hh2 Web Services in accordance with the support agreement is found at:  
<https://www.hh2.com/support>

2. Select Contact hh2 Support.
3. Enter Name, Email, Phone and Cell Information.
4. Select a contact method in the Contact Me field (Via my cell, phone, email address).
5. Describe the issue or reason for needing assistance.
6. Take a screenshot of the area in the mobile application where assistance is needed.
7. Select Screen shot and either select Existing Photo (for a single photo) or Batch Import (for more than one photo).
8. Select the photo(s) from the device.
9. Select Submit Support Ticket.
10. The Support Team will reach out as soon as the next representative is available.


### To Contact Your Administrator at the Construction Company:

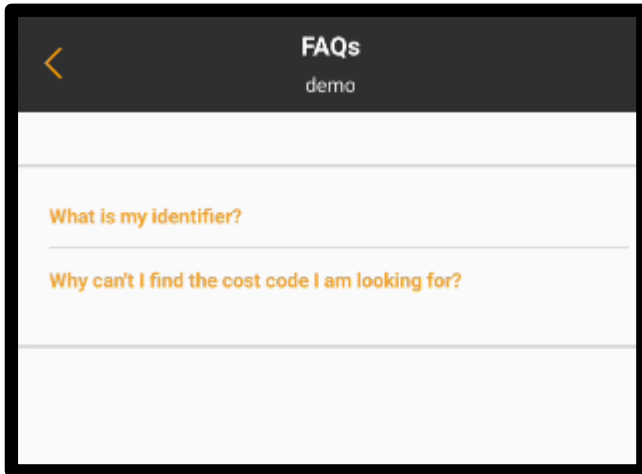
1. Select the Help  icon.
2. Select Contact Your Admin.



3. Select the Phone  icon to call the administrator.
4. Select the Email  icon to start an email to the administrator.

### To Access FAQs:


1. Select the Help  icon.
2. Select FAQs.



3. Select the specific FAQ for additional information.
4. Select Back to return to the Document Flow mobile application.

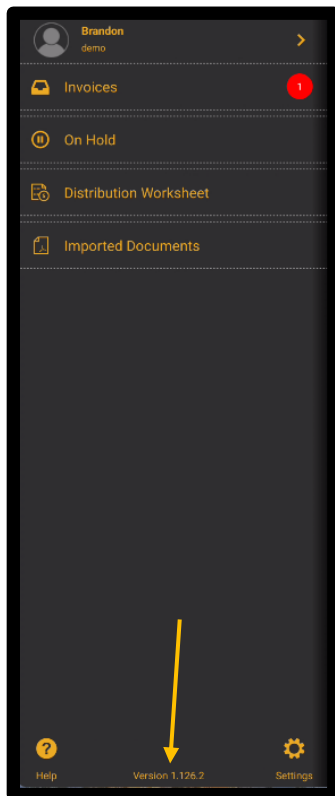


### To Access Instructional Videos:

1. Select the Help  icon.
2. Select Instructional Videos.
3. Select Play.
4. Select Close.

### Software Version

The software version can be found on the Home Page.



### Document Flow Settings

See [Mobile Application System Configuration](#).

## Understanding the Document Flow Process

The hh2 Document Flow system is designed for an easy and convenient way to upload receipts, reimbursements, and invoices directly from the field user's mobile device. These documents can then be approved by the necessary stakeholders in a workflow called the Workflow List. Workflow Lists will vary by construction company and are customizable to the construction company's needs.

Some Workflow Lists will include the end field user, the field supervisor, and the AP Manager, while others will be configured differently. In hh2 invoices, receipts, and reimbursements serve distinct purposes. Invoices encompass documents from suppliers for materials, labor, or equipment. Receipts involve records of transactions paid with a company credit card, whether in paper or digital form. Reimbursements (also referred to as expenses) consist of receipts for employee purchases made without a company credit card, necessitating reimbursement. Reimbursements may be thought of as out of pocket expenses often paid with cash or another method of payment besides the company credit card. **Note:** All three (invoices, receipts, and reimbursements) will ultimately be converted into invoices.

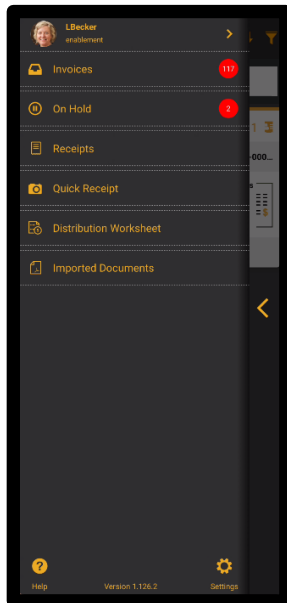
If an invoice needs to be approved by the user, it can be found in the Invoice Queue. Once approved from the Invoice Queue, an invoice will move on to the next individual (job role-such as supervisor) in the Workflow List. Users may place an invoice On Hold in the On Hold Queue. The On Hold Queue allows only the user to modify, verify or delete invoices before approving and progressing them through the Workflow List. Invoices will reside in the On Hold Queue until further action is taken. Invoices may be sent back to the user for corrections. Those invoices will be found in the Invoice Queue.

The basic process is as follows:

1. Upload an invoice or receipt.
2. Code it and approve it.
3. It will automatically be sent through the Workflow List. Ultimately, the AP Manager will receive it, approve it, and send it through the accounting system.

## The Document Flow Home Page

Each user will start on the Home Page.



From the Document Flow Home Page the following menu options are available:

**Invoices:** This menu option serves as the Invoice Queue. This is where invoices (and receipts and reimbursements that were converted to invoices) can be managed. Invoice management involves accessing, coding, editing, annotating, emailing, routing, and performing various other tasks associated with these documents.

**On Hold:** This menu option serves as a placeholder for the user. It is also known as the On Hold Queue. Here invoice (and receipts and reimbursements that were converted to invoices) can be placed on hold for further evaluation. Users may delete, route, or reject invoices/receipts/reimbursements that are held in the On Hold Queue.

**Receipts:** This menu option is available based on permissions granted. Here only receipts and reimbursements can be added, edited, and deleted.

**Quick Receipts:** This menu option allows the user to quickly capture and code receipts. This feature can be utilized for taking photos one at a time or by batch.

**Distribution Worksheet:** This menu option provides the user a place to batch code and approve invoices, receipts, and reimbursements.

**Imported Documents:** This menu option is used by the user to capture and upload photos and documents.

Throughout the product, the Hamburger  icon may be used to return to the Home Page and the Home Page may be collapsed using .

## Imported Documents

The Imported Documents feature allows the field user to conveniently snap a shot of invoices or receipts and upload them into the system. Once uploaded from the mobile device, these images of receipts and invoices (documents) can be seen by the construction company's office staff on the hh2 website. The field user may add new images or view images already uploaded.

### Navigation: Home Page>Imported Documents


Importing documents will involve a 2-step process:

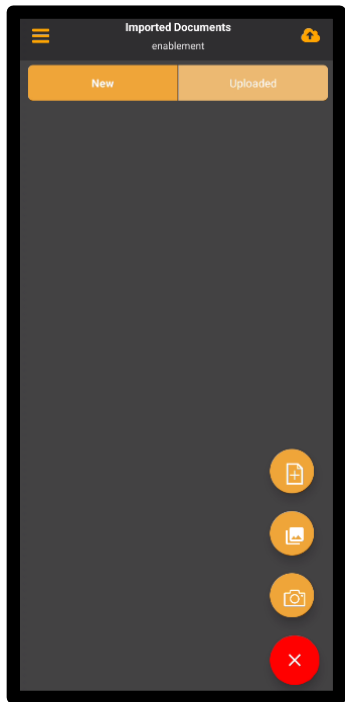
1. Snap a photo of the receipt or document (usually an invoice) on the mobile device.
2. Then upload the photo(s) immediately or later from the Gallery (Android) or Photos (Apple). In addition to photo uploads, file uploads may occur from the mobile device as well.


### To Take Photos of Receipts and Documents (one at a time or in batch) and Immediately Upload:

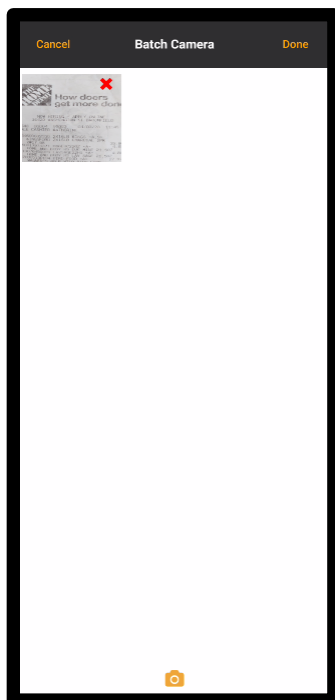
1. Select Imported Documents from the Home Page.




2. Select New.
3. Select the Add  icon.



4. Select the Camera  icon. The device may require the user to provide permission to take pictures.
5. Take the photo.
6. Select OK.
7. Crop the photo as needed.
8. Select OK.





9. At this point, the user has three options:

- a. Delete the photo: On the Batch Camera Page, the user may delete the photo using **X** and select cancel, if the photo is unsatisfactory.
- b. Keep the photo: If the photo is satisfactory, select Done from the Batch Camera Page to move onto uploading.
- c. Continue taking pictures one after another (in batch): Select the small Camera  icon at the bottom of the Batch Camera Page to continue taking pictures one after another. When complete, use **X** to delete any unwanted pictures or Done to move onto uploading.


Upload Imported Document?	
No	Yes

10. Select Yes to upload the photo immediately.


**Note:** If photos are not uploaded immediately, they will “sit” in the New tab. They can later be uploaded using the Upload  icon. Or, they may be deleted from the New tab by selecting it and using the Delete  icon.

## To Upload Photos from the Gallery (Android) or Photos (Apple):

Sometimes the user may take photos and decide to upload them later. The photos, at that point, will be in Gallery or Photos on the user's phone.

1. Select Imported Documents from the Home Page.
2. Select New.
3. Select the Add  icon.




4. Select the Pictures  icon. The device may require the user to provide permission to take pictures.
5. Select the picture to upload. One picture may be uploaded at a time.
6. A PDF will be created from the image. Once that is completed, the following displays.






7. Select Yes.
8. The document or receipt will be displayed in Uploaded.

### To Upload Files:

1. Select Imported Documents from the Home Page.
2. Select New.
3. Select the Add  icon.



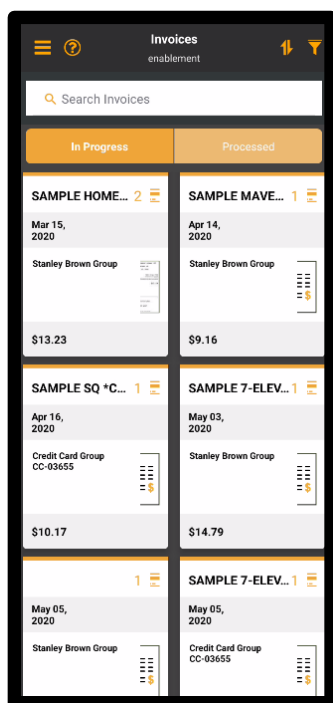
4. Select the Files  icon.
5. Select a photo(s) or document(s) from the files. PDF is the best format.
6. Select the Upload  icon.

**Note:** The Exit  icon will exit the user from the Imported Documents page.





## Invoices

Once invoices, credit card receipts and reimbursement receipts have been uploaded, they are now considered to be invoices and can be managed from the Invoices option from the Home Page. This is sometimes referred to as the Invoice Queue. The Invoice Queue is where newly uploaded invoices, those sent back to the user for review and those in need of approval reside. **Note:** The number of invoices in the Invoice Queue will be indicated by the red number next to Invoices on the Home Page. This alerts the user that there are invoices that require attention.



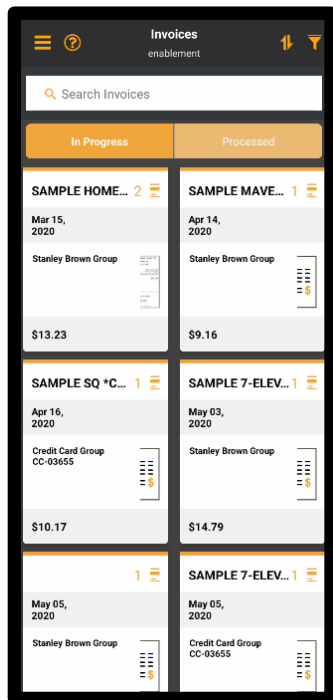
### Navigation: Home Page>Invoices






From the Invoices Home Page, the user can:

- Sort invoices by Invoice Date (Oldest or Newest First, Job Number, Vendor Number) using the Sort  icon.
- Filter Invoices by All Scenarios, Uncoded, Invoices, Credit Card Transactions, Reimbursements and Documents without Images using the Filter  icon.
- Search for invoices using the search tool
- Toggle between In Progress (those invoices in the Workflow) or Processed (those that have already been processed).
- Select on the invoice to be brought to the Invoice Detail Page where more detailed information can be viewed, including the image itself. On the Invoice Detail Page, the Header and Distribution information may be viewed, coded, and corrected.

**To View the Invoice Image (including a Credit Card or Reimbursement Receipt converted to an invoice):**

1. Select Invoices from the Home Page.



2. The Description (in this case Sample Home Depot Store 167), Transaction Date and Amount display. The type of invoice is also indicated with an associated icon. Credit card invoices are indicated by the Credit Card  icon, while other non-credit card invoices are represented by the Invoice  icon. Reimbursements are indicated by the Reimbursement  icon. The number of pages for the image is also denoted. If there is an image, it too, will display.
3. Use the Sort  icon, Filter  icon and search field, as needed, to locate the Invoice.
4. Select on a specific invoice. This will take the user to the Image section on the Invoice Detail Page.

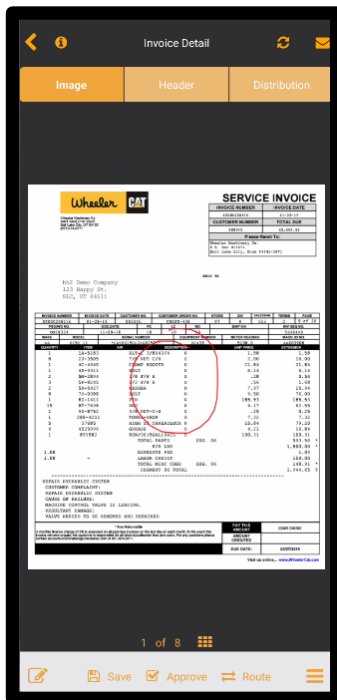


Image of an Invoice



Image of a Receipt for either a purchased made with a company credit card or by other means (reimbursement)



Image of a Receipt that was auto-generated by hh2 because there was no associated image. **Note:** When invoices/receipts of any type do not have an associated image, the system will auto-generate one, as indicated by 'Auto-Generated by hh2 Cloud Services' noted on the image.

## Coding Invoices

After the user captures and uploads a photo of the receipt (and on occasion an invoice), the AP Manager will accept it from the hh2 website. Once accepted by the AP Manager, it may be available for the field user in the In Progress section of the Invoice Queue (Home Page>Invoices>In Progress) for coding and approval. This, of course, is dependent upon the construction company's workflow set up. Meaning if the employee is part of the approval process, the invoice will be found in their In Progress Queue.

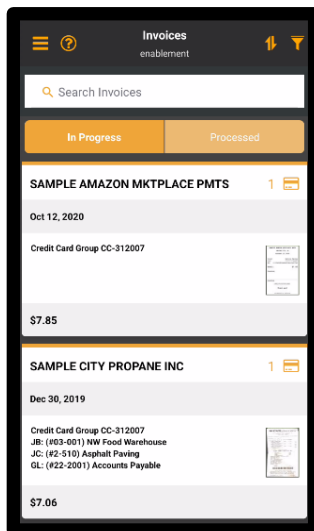
## Header Information



Header information is pertinent information needed to process the invoice, credit card receipt or reimbursement receipt through the hh2 system and into the construction company's accounting system. This assists in keeping accurate financial information regarding the cost of jobs and how money is spent. When this information is not properly coded, the AP Manager may send the invoice/receipt back to the user through the workflow for further coding. Those improperly coded invoices/receipts will be found in the In Progress section of the Invoice Queue (Home Page>Invoices>In Progress), just like those that have been accepted by the AP Manager.

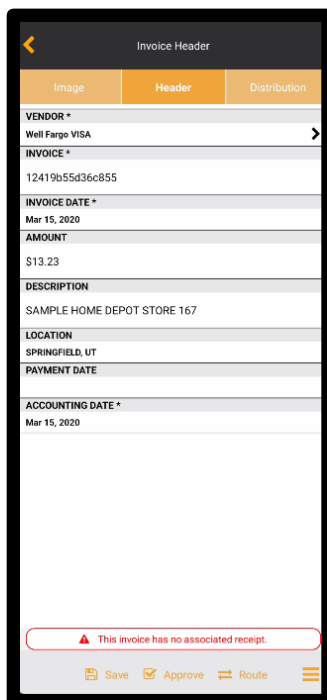
Header coding includes information such as the Vendor, Invoice Date, Amount, Description and Location. This information will vary by construction company to best suit their business needs.

## To Code Header Information:

1. Select Invoices from the Home Page.



2. Use the Sort  icon, Filter  icon and search field, as needed, to locate the Invoice.
3. Select In Progress.
4. Select the invoice/receipt.



5. Select Header at the top of the page.

**Invoice Distribution** Clear

**JOB**  
#03-003  
Fort Wayne Officer's Club

**COST CODE**  
#9-510  
Acoustical Ceilings

**CATEGORY**  
#M  
Material

**EXPENSE ACCOUNT**

**DESCRIPTION +**  
SAMPLE HOME DEPOT STORE 167

**EQUIPMENT ITEM**

**EQUIPMENT STANDARD COST CODE**

⚠ This invoice has no associated receipt.



Save Approve Route Menu

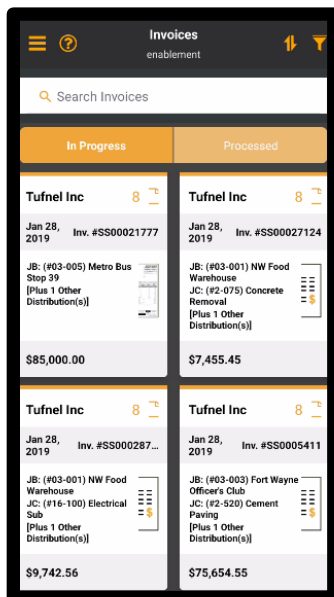
6. Enter the necessary data. Vendor, Invoice Date and Amount are required. Other fields may be required based upon the construction company's needs. When the Vendor field is selected, the user will be brought to another page that lists vendors. Select the appropriate vendor from the Vendor List. The Invoice number will automatically populate the Invoice field.
7. Select Save.

## Distribution Information

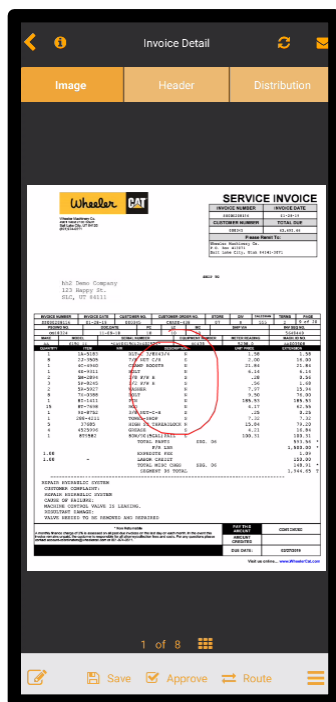
Invoice distribution is the assignment of expenses to designated jobs, cost codes, categories, or expense accounts, facilitating precise tracking and management of project related costs. In some construction companies, the field user will code the Distribution information.

### To Code Distribution Information:

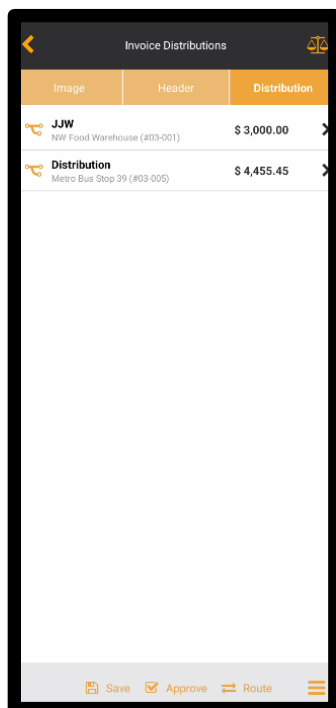
1. Select Invoices from the Home Page.
2. Use the Sort  icon, Filter  icon and search field, as needed, to locate the Invoice.



3. Select In Progress.
4. Select the image. This will take the user to the Image section of the Invoice Detail Page.



5. Select Distribution towards the top of the page.



6. Select on a line for distribution coding.



**Invoice Distribution** Clear

**JOB**  
#03-001  
NW Food Warehouse

**COST CODE**  
#2-075  
Concrete Removal

**CATEGORY**  
#5  
Subcontracts

**COMMITMENT**  
#03006-11  
Demolition - \$0.00

**COMMITMENT ITEM**  
#2  
Concrete Removal - \$0.00

**EXPENSE ACCOUNT**

**AP ACCOUNT**

**TAX GROUP**

**AMOUNT \***  
\$3,000.00

**TAX**  
\$0.00

**RETAINAGE**  
\$0.00

**DESCRIPTION**

Save Approve Route

7. Next, the user will enter the necessary data. Commonly required distribution data includes Job, Cost Code and Category. A Description is required. If using GL accounts, an Expense Account needs to be coded and if using equipment, the equipment name and cost code is commonly coded.
8. To enter the data, select on the appropriate field. For instance, the Job field.

**Invoice Distribution** Clear

**JOB**  
#03-015  
Beaverton Office Park

**COST CODE**

**CATEGORY**

**EXPENSE ACCOUNT**


**DESCRIPTION \***  
SAMPLE AMAZON MKTPLACE PMTS

**EQUIPMENT ITEM**

**EQUIPMENT STANDARD COST CODE**



▲ This invoice has no associated receipt.

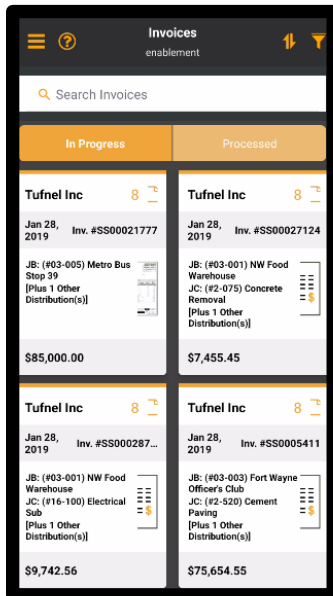
Save Approve Route

9. The associated Master List will display. For example, when the Job field is selected, the Master Job List displays. Select the appropriate data from the Master List that appears. **Note:** For Jobs, the Job Explorer  icon displays. If using the Job Explorer, from the Job Explorer Page, select the associated Cost Code and Category and then Done. If not using the Job Explorer, simply select the Job from the Master Job List.
10. Continue to fill each field required by the construction company.
11. Select Save. Clear may be used to clear all data without saving.
12. Repeat as needed for each distribution line.

## To Split a Distribution:

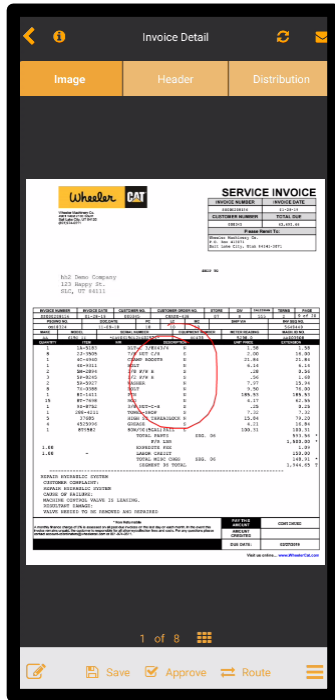
Some circumstances require distribution data to be split. For instance, the amount of an invoice or receipt may need to be split across Jobs.

1. Select Invoices from the Home Page.
2. Use the Sort  icon, Filter  icon and search field, as needed, to locate the Invoice.

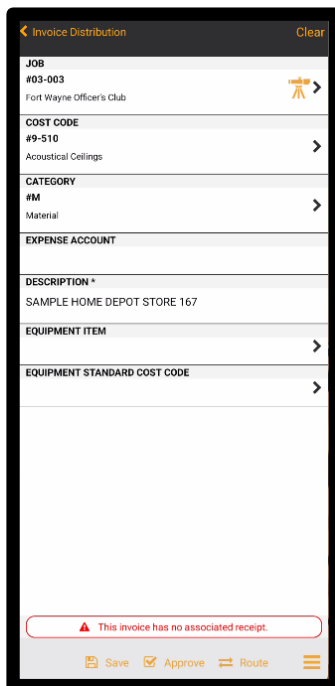


3. Select In Progress.

4. Select the image.



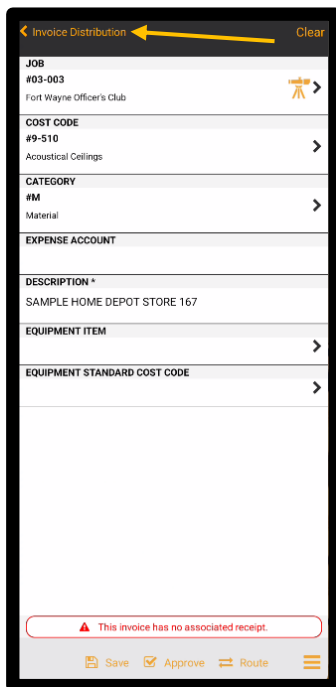
5. Select Distribution towards the top of the page.




6. Code distribution data, as needed. See [To Code Distribution Information](#).

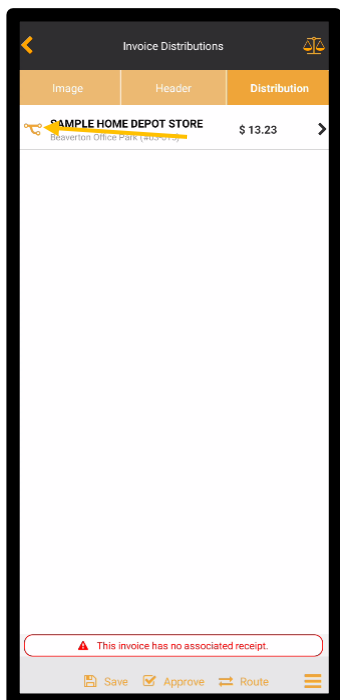
7. Select Save.

8. Select Invoice Distribution in the upper left corner.



The screenshot shows a mobile application interface for 'Invoice Distribution'. At the top, there is a header bar with a back arrow, the text 'Invoice Distribution', and a 'Clear' button. Below this, the form contains several sections: 'JOB' with details '#03-003' and 'Fort Wayne Officer's Club'; 'COST CODE' with '#9-510' and 'Acoustical Ceilings'; 'CATEGORY' with '#M' and 'Material'; 'EXPENSE ACCOUNT' (empty); 'DESCRIPTION \*' with 'SAMPLE HOME DEPOT STORE 167'; 'EQUIPMENT ITEM' (empty); and 'EQUIPMENT STANDARD COST CODE' (empty). At the bottom, there is a red warning message: 'This invoice has no associated receipt.' and a navigation bar with 'Save', 'Approve', 'Route', and a menu icon.

9. Select the Split Distribution  icon.



The screenshot shows a mobile application interface for 'Invoice Distributions'. At the top, there is a header bar with a back arrow, the text 'Invoice Distributions', and a 'Split Distribution' icon. Below this, there is a table with three columns: 'Image', 'Header', and 'Distribution'. The first row shows a 'SAMPLE HOME DEPOT STORE' with a price of '\$ 13.23'. Below the table, there is a red warning message: 'This invoice has no associated receipt.' and a navigation bar with 'Save', 'Approve', 'Route', and a menu icon.

10. Enter the amount to split.

Confirmation



Please enter amount to split off.

10.00

CancelOK

11. Select OK.

Invoice Distributions

Image	Header	Distribution
	SAMPLE HOME DEPOT STORE Beaverton Office Park (803-013)	\$ 3.23 >
	SAMPLE HOME DEPOT STORE	\$ 10.00 >

This invoice has no associated receipt.

Save Approve Route

12. Two distributions will now display (the original and a new one from the split). **Note:** For the newly split distribution, coding must occur. Select the line item for the newly added split. Notice that the fields are blank thus requiring coding.

13. Code the Distribution data for the split portion of the invoice. Clear and Delete may be used, as needed.

Invoice Distribution

Clear

JOB

COST CODE

CATEGORY

EXPENSE ACCOUNT

DESCRIPTION \*

SAMPLE HOME DEPOT STORE 167

EQUIPMENT ITEM

EQUIPMENT STANDARD COST CODE




This invoice has no associated receipt.

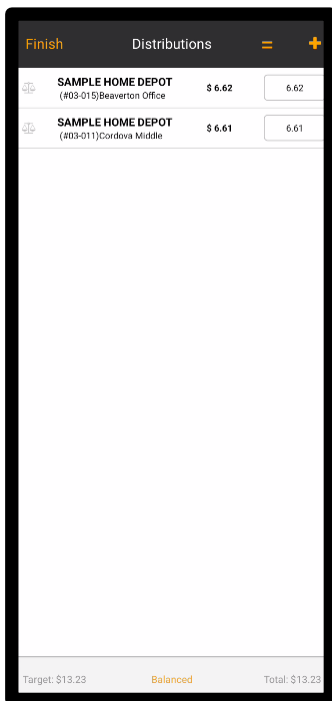
Save Approve Route


14. Select Save.

## To Split the Distributions Equally:

After distributions are entered and split, the amounts may be split evenly.





1. Select Invoices from the Home Page.
2. Use the Sort  icon, Filter  icon and search field, as needed, to locate the Invoice.
3. Select In Progress.
4. Select the image.
5. Select Distribution towards the top of the page.
6. Select Invoice Distribution in the upper left corner.
7. Select the Balance  icon.



8. Select . Note: There must be a distribution split for this to work. If not, split the distribution first. See [To Split a Distribution](#).
9. Select Finished. **Note:** Distribution amounts must match the amount in the Amount field on the Header, or a warning will be given.
10. Select Save.



### To Add an Additional Distribution:

1. Select Invoices from the Home Page.
2. Use the Sort  icon, Filter  icon and search field, as needed, to locate the Invoice.
3. Select In Progress.
4. Select the image.
5. Select Distribution towards the top of the page.
6. Select Invoice Distribution in the upper left corner.
7. Select the Balance  icon.
8. Select the Add  icon.
9. Add the Description.

**Confirmation**

Please specify description.

SAMPLE HOME DEPOT


CancelOK

10. Select OK.

Distributions			
	SAMPLE HOME DEPOT (#03-015)Beaverton Office	\$ 3.23	3.23
	SAMPLE HOME DEPOT (#03-011)Cordova Middle	\$ 10.00	10.00
	SAMPLE HOME DEPOT	\$ 0.00	0.00

Target: \$13.23      **Balanced**      Total: \$13.23

11. Enter the amount to split or select = to split evenly across all distributions. If the distribution is over or above the amount entered in the Amount field on the Header, it will be indicated at the bottom of the Distributions Page.
12. Select Finish.
13. Select Save.

**Note:** If the Balance  icon is selected again, the amounts will split the existing and newly added distributions evenly.


**Note:** Distribution amounts must match the amount in the Amount field on the Header. Otherwise a warning will display.

**Confirmation**

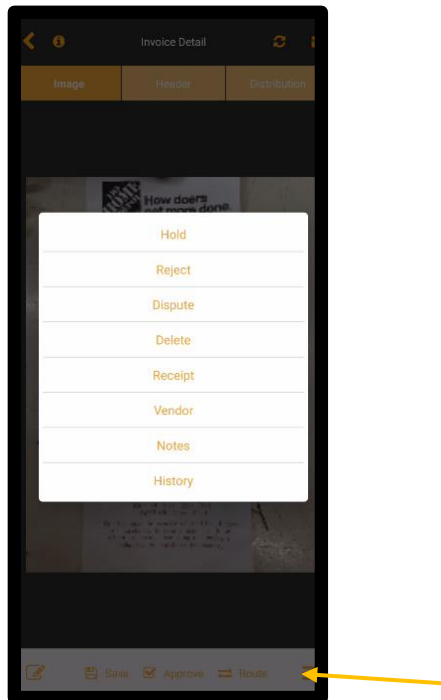
The distribution records must match the header amount. Please adjust the distribution records until your total amount matches the target amount.

**OK**

## Tools Available on the Invoice Detail Page

A variety of convenient tools are available to the user on the Invoice Detail Page. These tools can be found by selecting the Hamburger  icon the bottom of the page.

**Navigation: Home Page>Invoices>select a specific invoice.**




**These tools allow the user to:**

- Email invoices
- Edit the invoice using annotation tools
- Generate a PDF
- Save the invoice
- Approve, Route, Reject, and Dispute an invoice. See [Workflow Approval Process](#)
- View and Add Receipts
- View Vendor information
- Write notes
- View invoice history


**Note:** Permissions to operate features may vary based on system settings and user permissions.

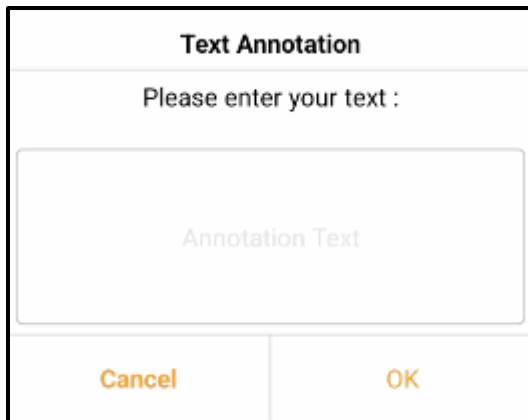
### To Email or Text an Invoice from the Invoice Detail Page:

1. Select Invoices>specific invoice.
2. Select the Email  icon at the top of the page.
3. Select the email or text contact to which the invoice should be sent.


### To Edit the Invoice Using Annotation Tools from the Invoice Detail Page

Annotation tools are available to make signing, writing notes, and highlighting receipts and invoices easy from the mobile device.

1. Select Invoices>specific invoice.
2. Select the Edit  icon at the bottom of the page.
3. Select Edit.
4. To draw on the invoice/receipt: select Draw, draw as needed, then select Save.
5. To annotate with text on the invoice/receipt: select Draw Text.




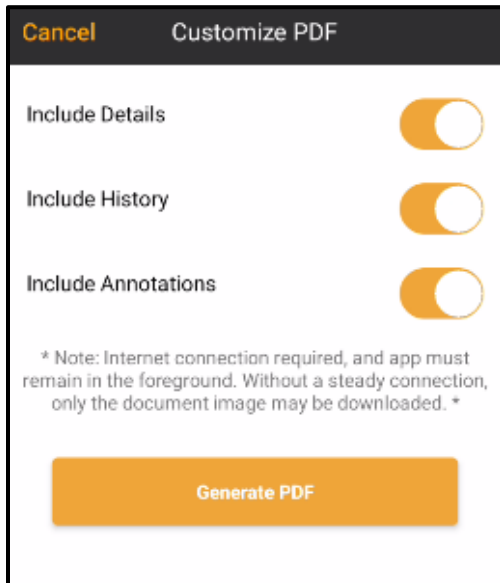
The image shows a 'Text Annotation' dialog box. At the top, it says 'Text Annotation'. Below that, it says 'Please enter your text :'. There is a large text input field with the placeholder text 'Annotation Text'. At the bottom, there are two buttons: 'Cancel' and 'OK'.

6. Type the text, then select OK, then Select Save.
7. To highlight parts of the invoice/receipt: select Highlight, make the highlights, then select Save.
8. To Clear the invoice/receipt of annotations: select Clear, wipe any markings away, then select Save.
9. Annotations can be moved using the Move  icon. Select Move, select the annotation, move it, then select Save.

### To Generate a PDF of an Invoice from the Invoice Detail Page:

Customized PDFs may be generated; however an internet connection is required.


1. Select Invoices>specific invoice.
2. Select the Edit  icon.
3. Select Download.

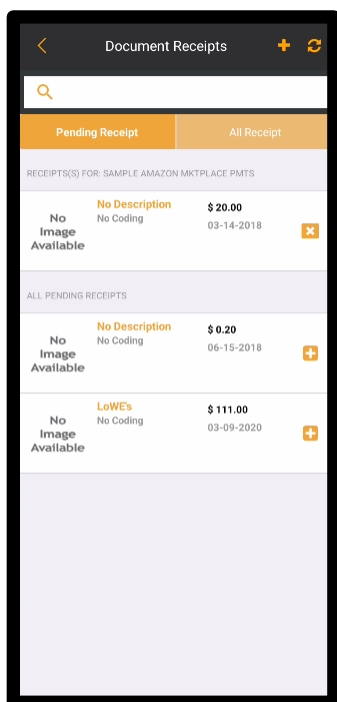





4. Select to include details, history and/or annotations or not with a toggle.
5. Select Generate PDF.
6. The PDF can then be shared with others via email or text.

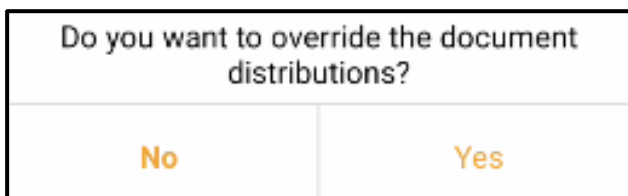
## To View Pending or All Receipts from the Invoice Detail Page:

Pending and All Receipts may be viewed from the Document Receipts Page. This information is limited to credit card receipts and reimbursements, not regular invoices.

1. Select Invoices>specific invoice.
2. Select the Hamburger  icon the bottom of the page.
3. Select Receipt from the menu that displays.




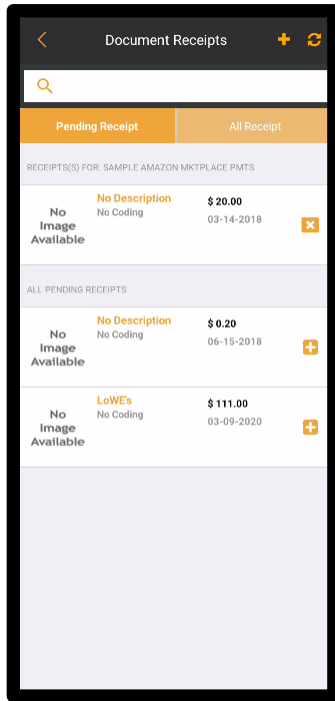
**Note:** The Assign To  icon will move the receipt from the Receipts section to All Pending Receipts on the Document Receipts Page. The Add  icon next to the receipt will move the receipt from the All Pending Receipts section to the Receipts section of the Document Receipts Page. When selecting the Add  icon, this message will appear.



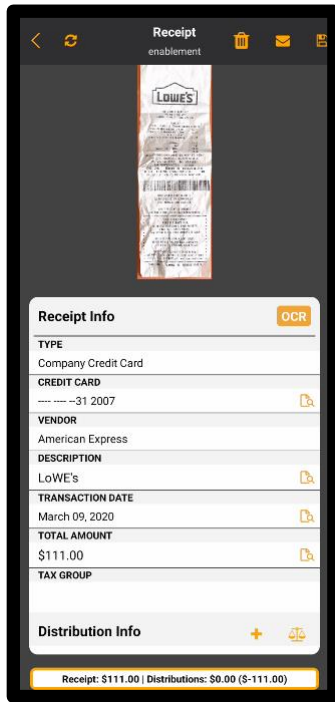
4. This will override the information originally coded to the receipt.

### To Access the Receipts Page from the Invoice Detail Page:

1. Select Invoices>specific invoice.
2. Select the Hamburger  icon the bottom of the page.
3. Select Receipt from the menu that displays.




4. Select the specific Receipt.

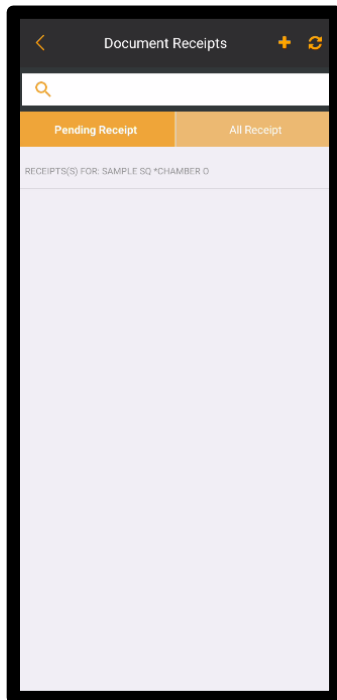



5. From the Receipt Page, Header and Distribution information may be coded. Distribution information will be found by scrolling down. Likewise, Notes may be added. Using the tools at the top, the receipt may be deleted, emailed, or texted and saved. The **OCR** tool is used to preload header and distribution data that has already been recognized by the system. See [Receipts](#) for further information.

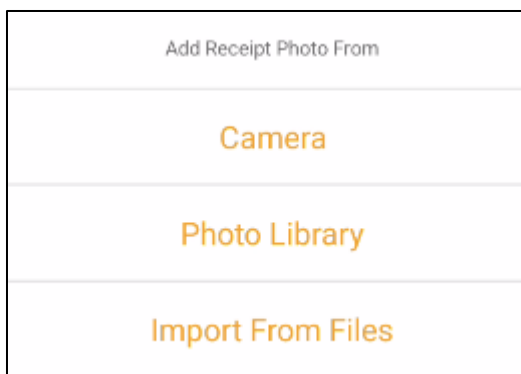


### To Add Receipts from the Detail Invoice Page:

1. Select Invoices>specific invoice.
2. Select the Hamburger  icon the bottom of the page.
3. Select Receipt from the menu that displays.




4. Select the Add  icon at the top of the Document Receipts Page.

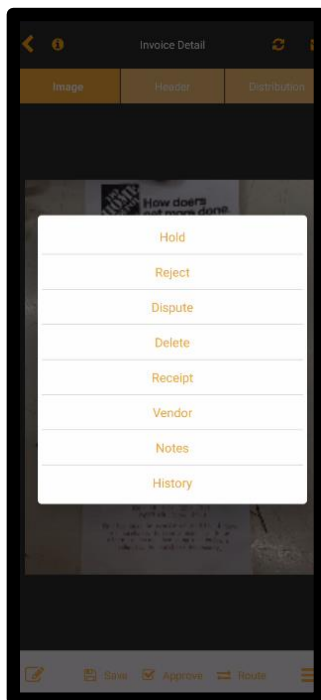


The same process for uploading invoices and receipts may be followed as it is from Imported Documents. See [Imported Documents](#).

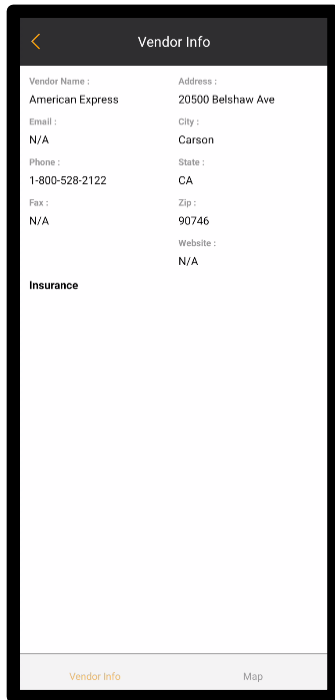
### To View and Map Vendor Information:

A vendor refers to an Account Payable (AP) Vendor, which is a supplier for Purchase Orders or a Subcontractor for a Subcontract. All Commitments have an AP Vendor assigned. For Credit Card transactions, a Vendor refers to the business that the item was purchased from in the credit card transaction. For reimbursements, companies set employees up as Vendors so that approved reimbursements can be processed via an AP check.

1. Select Invoices>specific invoice.
2. Select the Hamburger  icon the bottom of the page.



3. Select Vendor.




4. The vendor's information such as address, phone, and website displays. Additionally, the vendor's insurance status is available. **Note:** If a vendor's insurance is expired, a warning will be displayed, or approval may be blocked based on settings set by the System Administrator. The user may toggle between Vendor Info and Map at the bottom.

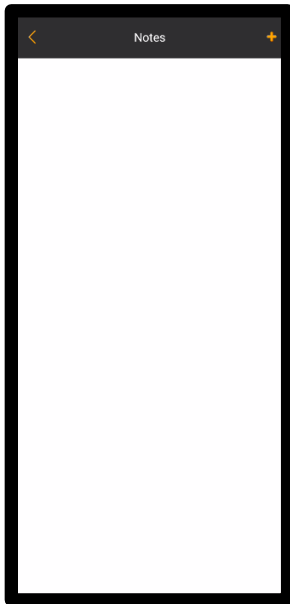
#### To Map a Vendor's Location:


1. From the Vendor Info Page, select Map.
2. Select Standard, Hybrid or Satellite.
  - Standard mapping displays basic cartographic features.
  - Hybrid mapping combines street maps with satellite imagery for a comprehensive view.
  - Satellite mapping provides detailed, real-world views captured by satellites from above.

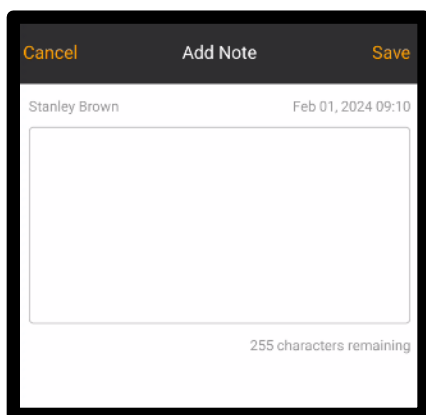
### To Add and View Notes:

Notes may be added about an invoice/receipt.

1. Select Invoices>specific invoice.
2. Select the Hamburger  icon the bottom of the page.
3. Select Notes.




4. Select the Add  icon.
5. Add the note.

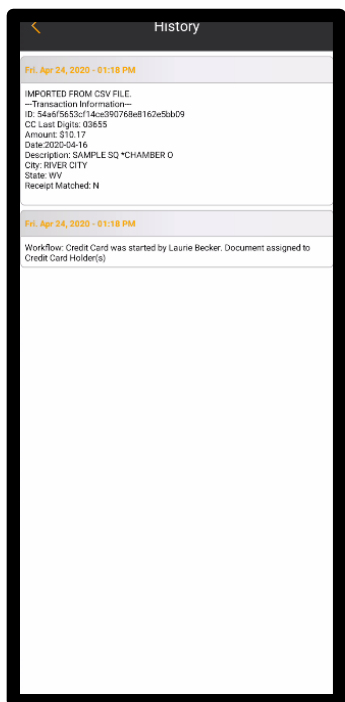


6. Select Save. Once a note is added it can be viewed from here as well.

## To View Invoice History:

The user can view basic information about invoices and receipts. If the receipt was from a credit card transaction, details of the transaction will be displayed. Additionally, whether the receipt was matched with a credit card transaction, at the AP Manager level or not, can be determined from the Invoice History. The workflow history in the Invoice History indicates the current stage of approval. See [Workflow Approval Process](#).

1. Select Invoices>specific invoice.
2. Select the Hamburger  icon the bottom of the page.
3. Select History.




## The Workflow Approval Process

After the invoice/receipt has been captured and uploaded, it moves through a Workflow List in the hh2 system. Each construction company has unique workflows that meet their business needs. Throughout the workflow process members of the workflow may approve, reject, dispute, and route the invoices/receipts to others. These actions are performed from the Invoice Detail Page. Invoices requiring action will reside either in the Invoice Queue or the On Hold Queue. **Note:** The capabilities available are based on permissions set by the construction company's Administrator for particular users.

**Navigation: Home Page>Invoices>specific invoice.**


**To Approve an Invoice/Receipt from the Invoice Detail Page:**

1. Select Invoices and then a specific invoice which will bring the user to the Invoice Detail Page.
2. Select  **Approve** at the bottom of the page.

Confirmation	
Once you approved, you will no longer be able to edit this document. Are you sure you want to proceed?	
<b>Cancel</b>	<b>Approve</b>

3. Select Approve. This will move the invoice/receipt to the next level in the workflow and edits can no longer be made to it.


### To Place an Invoice/Receipt On Hold from the Invoice Detail Page:

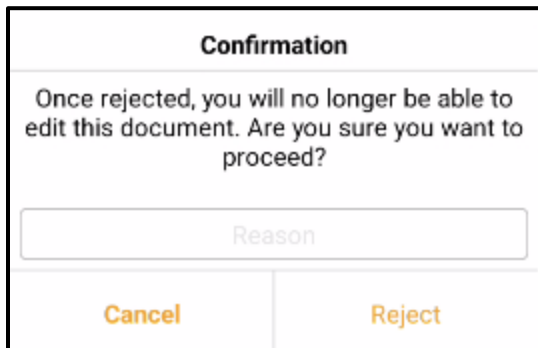
1. Select Invoices and then a specific invoice which will bring the user to the Invoice Detail Page.
2. Select the Hamburger  icon the bottom of the page.
3. Select Hold from the menu that displays.

Confirmation	
Once held, only you can edit this document. Are you sure you want to proceed?	
<input type="text" value="I need to upload a different image."/>	
Cancel	Hold

4. Enter the reason for the Hold.
5. Select Hold.
6. Once On Hold, only the user can edit the document which will is now housed in the On Hold Queue. See [On Hold](#).

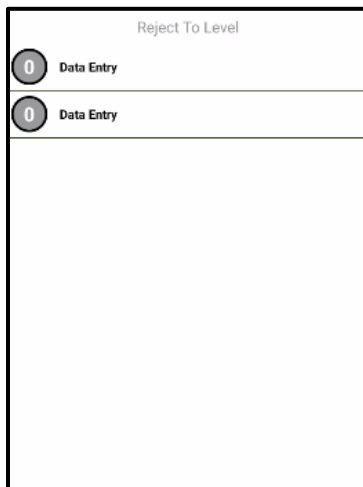
### To Reject an Invoice from the Invoice Detail Page:

1. Select Invoices and then a specific invoice which will bring the user to the Invoice Detail Page.
2. Select the Hamburger  icon the bottom of the page.
3. Select Reject from the menu that displays.



A confirmation dialog box titled "Confirmation". The text inside reads: "Once rejected, you will no longer be able to edit this document. Are you sure you want to proceed?". Below the text is a text input field labeled "Reason". At the bottom are two buttons: "Cancel" and "Reject".

4. Enter a reason for rejecting the invoice/receipt.
5. Select Reject.




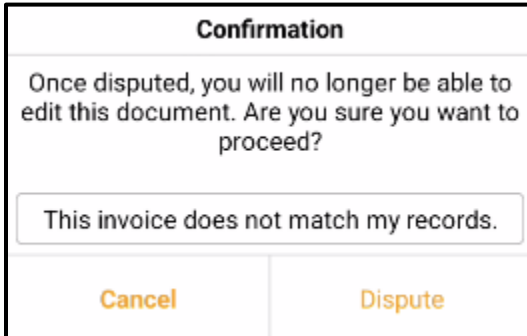
A screen titled "Reject To Level". It features a list of selection items, each with a circular icon containing the number "0" and the text "Data Entry". Below the list is a large empty rectangular area.

6. Select the level to reject the invoice/receipt to in the workflow. This will send the invoice/receipt back down the workflow based on the construction company's workflow set up. This page will vary based on the workflow set up for each construction company. Data Entry will send it back to the AP Manager. Other names or job roles may be listed here.



### To Dispute an Invoice from the Invoice Detail Page:


1. Select Invoices and then a specific invoice which will bring the user to the Invoice Detail Page.
2. Select the Hamburger  icon the bottom of the page.

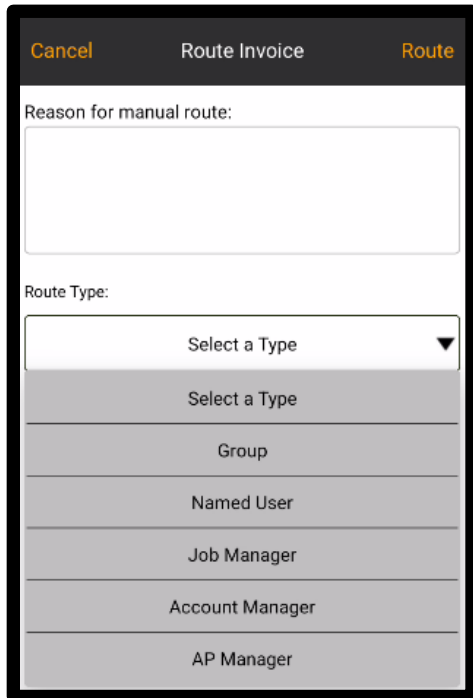


A confirmation dialog box with a black border. The title bar is labeled "Confirmation". The main text reads: "Once disputed, you will no longer be able to edit this document. Are you sure you want to proceed?". Below the text is a text input field containing the text "This invoice does not match my records.". At the bottom are two buttons: "Cancel" on the left and "Dispute" on the right, both in orange text.

3. Select Dispute.
4. Enter a reason for the dispute.
5. Select Dispute.
6. This will send the invoice/receipt back to the AP Manager for review.

### To Route an Invoice to Another Individual from the Invoice Detail Page:

1. Select Invoices and then a specific invoice which will bring the user to the Invoice Detail Page.
2. Select  **Route** at the bottom of the page.



3. Enter a reason for the manual route (versus going through the automated workflow).
4. Select a Route Type from the Picklist. In this example Job Manager.



5. Then select the appropriate route from the associated list. In this scenario, the appropriate Job Manager type (Project Coordinator, Manager, and so forth) would be selected from the Job Manager List.
6. Select Route.

Once routed, you will no longer be able to edit this document. Are you sure you want to proceed?	
Cancel	OK

7. Select OK.

## On Hold

Invoices/receipts may be placed on hold so that only the user placing them on hold can approve, route, reject or delete them. The On Hold feature provides the user with an opportunity to modify coding and/or take an image of the invoice/receipt. The document will remain on hold until further action is taken.

**Navigation: Home Page> On Hold.**




In the On Hold Queue, invoices/receipts may be:

- Searched for using the search tool.
- Sorted by Invoice Date (oldest/newest first), Job Number or Vendor Name.
- Filtered by All Scenarios, Uncoded, Invoices, Credit Card Transactions, Reimbursements or Documents Without Images.
- Selected and the Header and Distribution may be edited.

**Note:** The number of invoices/receipts on hold will be indicated in red on the On Hold section of the Home Page. This alerts the user that On Hold invoices/receipts are present.

### To Place an Invoice/Receipt On Hold from the Invoice Detail Page:

1. Select Invoices and then a specific invoice which will bring the user to the Invoice Detail Page.
2. Select the Hamburger  icon the bottom of the page.
3. Select Hold from the menu that displays.

Confirmation	
Once held, only you can edit this document. Are you sure you want to proceed?	
<input type="text" value="I need to upload a different image."/>	
Cancel	Hold

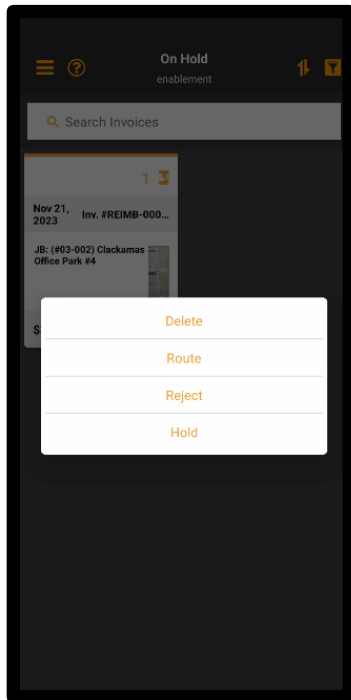
4. Enter the reason for the Hold.
5. Select Hold.
6. Once On Hold, only the user can edit the document which will is now housed in the On Hold Queue.

**To Edit Invoices/Receipts in the On Hold Queue:**

Just like from Invoice Queue (Home Page>Invoices), invoices/receipts may be edited from the On Hold Queue. In fact, when an invoice/receipt is selected from the On Hold Queue, the user is taken to the Invoice Detail Page. This is the same Invoice Detail Page as seen from the Invoice Queue. All the same tools and functions are available including coding Header and Distribution information. See [Coding Invoices](#). Likewise, the same tools are available. See [Tools Available on the Invoice Detail Page](#).

## To Delete Invoices/Receipts in the On Hold Queue:

1. Select On Hold and then a specific invoice/receipt.



2. Press on the invoice/receipt.

**Confirmation**

Are you sure you want to delete this invoice, deleting cannot be undone.

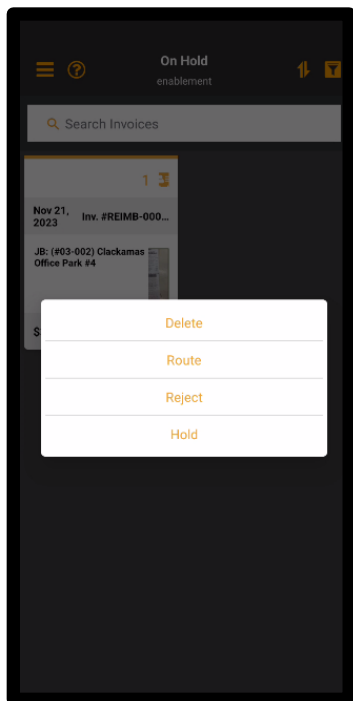
Reason

**Cancel** **Delete**

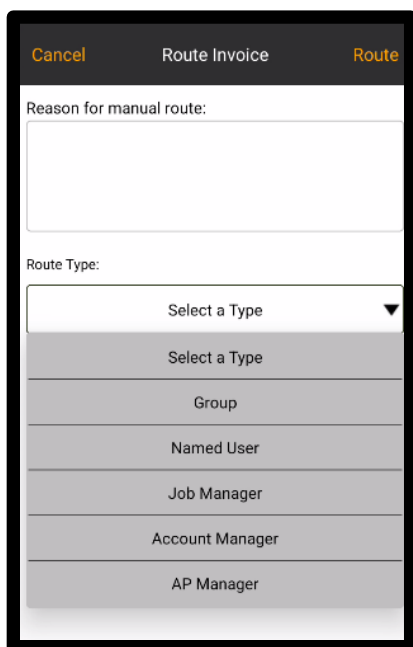
3. Select Delete.
4. Enter the reason for deletion.
5. Select Delete.
6. Once the invoice is deleted the user is directed back to the main menu to continue to work on invoices.

### To Route Invoices/Receipts in the On Hold Queue:

1. Select On Hold and then a specific invoice/receipt.



2. Press on the invoice/receipt.
3. Select Route.





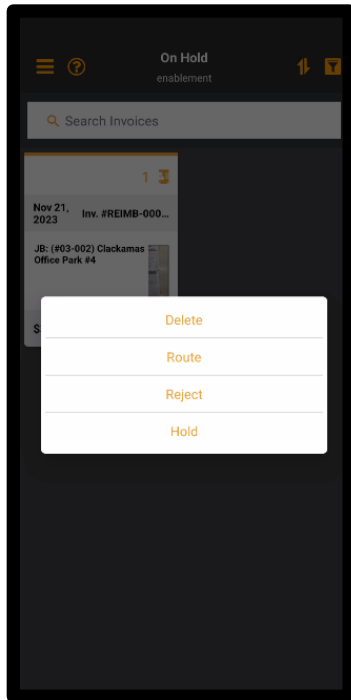
4. Enter the reason for the manual route.
5. Select the Route Type from the Picklist.
6. Select Route.

Once routed, you will no longer be able to edit this document. Are you sure you want to proceed?	
Cancel	OK

7. Select OK.

## To Reject an Invoice/Receipt On Hold:

1. Select On Hold and then a specific invoice/receipt.



2. Press on the invoice/receipt.
3. Select Reject.

**Confirmation**

Once rejected, you will no longer be able to edit this document. Are you sure you want to proceed?

Reason

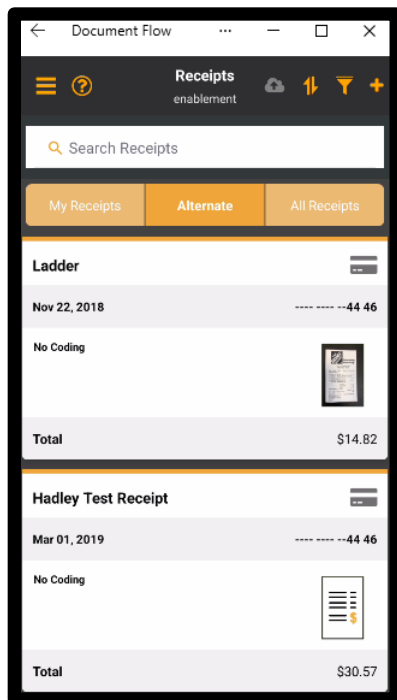
**Cancel****Reject**

4. Enter the reason for the rejection.
5. Select the Reject.

## Receipts

The Receipts feature provides an overall view of credit card receipts and reimbursements. Invoices are not included in this view. Based on permissions granted, certain users will have the capacity to view their own receipts and reimbursements, while other users may view receipts and reimbursements other than their own.

**Navigation: Home Page>Receipts**

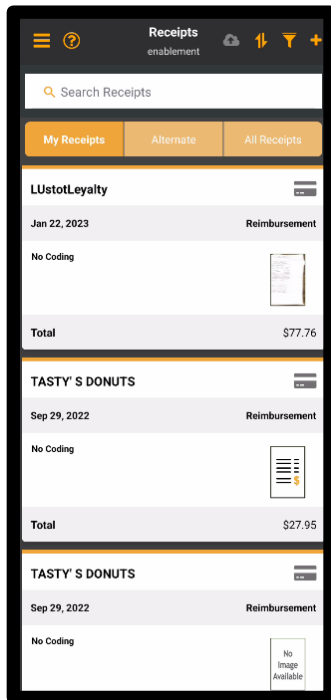


**Receipts may be:**

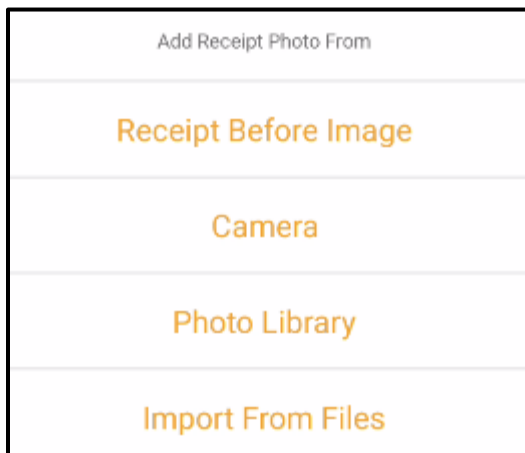
- Sorted by Transaction Date (Oldest or Newest), Create On Date (Oldest or Newest), Job or Cost Code
- Filtered by (Unmatched Receipts, Incomplete Receipts, Uncoded Receipts, Receipts Without Images, and Failed Receipts)
- Searched for using the search tool.
- Viewed by:
  - My Receipts (receipts created by the logged in user)
  - Alternate Receipts (credit card receipts, not reimbursement receipts, created by the logged in user or created by other users for the credit card assigned to the logged in user)
  - All Receipts (all receipts listed under My Receipts and Alternate Receipts).
- Added
- Edited, deleted, or sent to others via email any point of view

## To Add a Receipt:

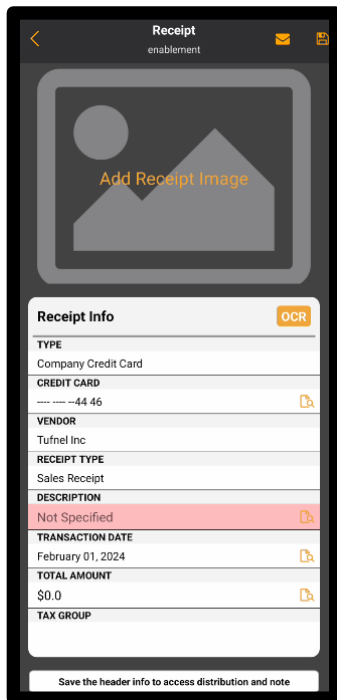
1. Select Receipts from the Home Page.
2. This function will work the same for My Receipts, Alternate Receipts and All Receipts.



3. Select the Add  icon at the top of the page.



4. Select Receipt Before Image to add a new receipt and code it.
5. Select Add Receipt Image in the middle of the page.



The screenshot shows a mobile application interface for adding a receipt. At the top, there's a header with a back arrow, the title "Receipt", and the status "enablement". Below the header is a large image placeholder with the text "Add Receipt Image". Underneath is a form titled "Receipt Info" with an "OCR" button. The form contains several fields: TYPE (Company Credit Card), CREDIT CARD (--- --44 46), VENDOR (Tufnel Inc), RECEIPT TYPE (Sales Receipt), DESCRIPTION (Not Specified), TRANSACTION DATE (February 01, 2024), TOTAL AMOUNT (\$0.0), and TAX GROUP. Each field has a small icon to its right. At the bottom of the form, there's a note: "Save the header info to access distribution and note".

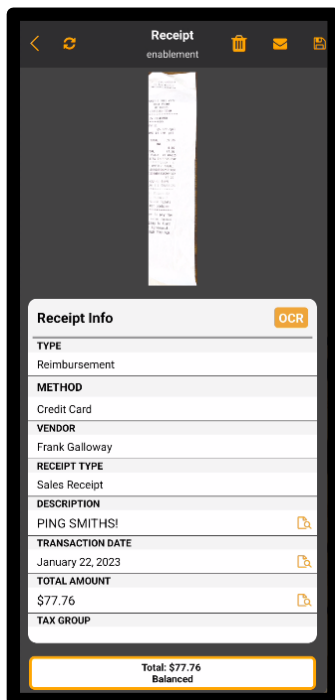
Receipt Info		OCR
TYPE	Company Credit Card	
CREDIT CARD	--- --44 46	
VENDOR	Tufnel Inc	
RECEIPT TYPE	Sales Receipt	
DESCRIPTION	Not Specified	
TRANSACTION DATE	February 01, 2024	
TOTAL AMOUNT	\$0.0	
TAX GROUP		

Save the header info to access distribution and note

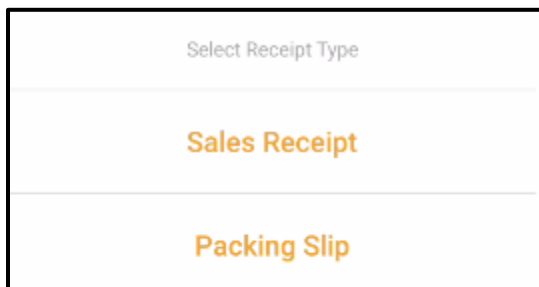
6. Follow the instructions on Imported Documents to use the Camera, Photo Library, and Import Files, as the process is similar. See [Imported Documents](#).

## To Edit a Receipt:

1. Select Receipts from the Home Page.
2. This function will work the same for My Receipts, Alternate Receipts and All Receipts.
3. Select the specific receipt.

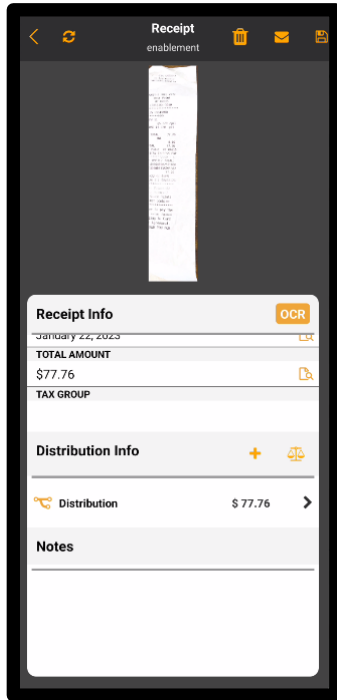


4. Make the necessary modifications by selecting the field that requires change.
5. From that field, select the appropriate data from the page that follows. For instance, if Receipt Type is selected, select the type of purchase (Sales Receipt or Packing Slip) from the page that follows.



6. Depending on the data modified, a warning may appear. Select OK, to agree to the change, if appropriate.

7. Scroll to the bottom of the page to make changes to, add, split, or balance distributions. Use the same processes as when originally coding the receipt. See [Coding Invoices](#).




8. When all modifications have been made, select Save at the top of the page . Saving options will vary. The Submit option (labeled on iOS as Convert) will vary in availability based on if the user has permission to convert the receipt directly into an invoice. The availability varies specifically for company credit card receipts (reimbursement receipts always have the option to submit) and is set up by the Administrator within the Credit Card Group setup on the hh2 website . Save & Create will save the current receipt then create and open a brand new receipt for the user to fill out.

#### To Use OCR:

1. Select **OCR** to preload header and distribution data that has already been recognized by the system.

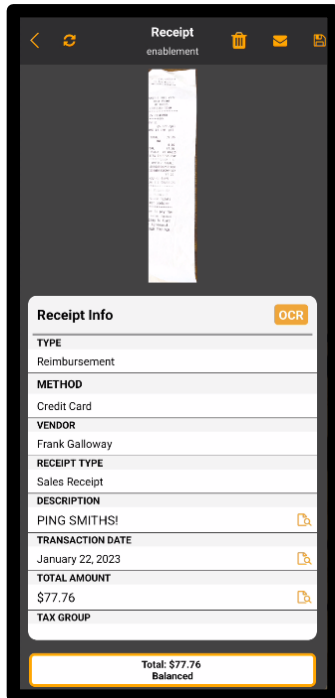
**To Add a Note to a Receipt:**


1. From the Receipt Page, select a specific receipt.
2. Scroll down to the Notes section.
3. Enter notes by typing or dictate notes using the Voice Dictate  on your device.
4. Select Save.



## To Delete a Receipt:

1. Select Receipts from the Home Page.
2. This function will work the same for My Receipts, Alternate Receipts and All Receipts.



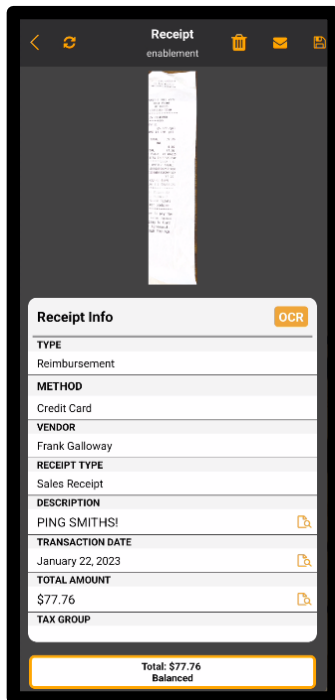
3. Select the specific receipt.
4. Select the Delete  icon.


Delete Receipt	
Do you wish to delete this receipt?	
Cancel	OK

5. Select OK.

### To Send a Receipt:

1. Select Receipts from the Home Page.
2. This function will work the same for My Receipts, Alternate Receipts and All Receipts.
3. Select the specific receipt.



4. Select the Email  icon.
5. Select the contact.
6. On iOS it will open a drafted email to send. On Android, it opens the share page to select the method to share the receipt further.


## Quick Receipts

Multiple receipts may be quickly captured using the Quick Receipts feature. The ability to access this function is based upon whether the user has permission to create receipts or not. This permission is enabled on the hh2 website.

### Navigation: Home Page>Quick Receipts

1. Select Quick Receipts from the Home Page.

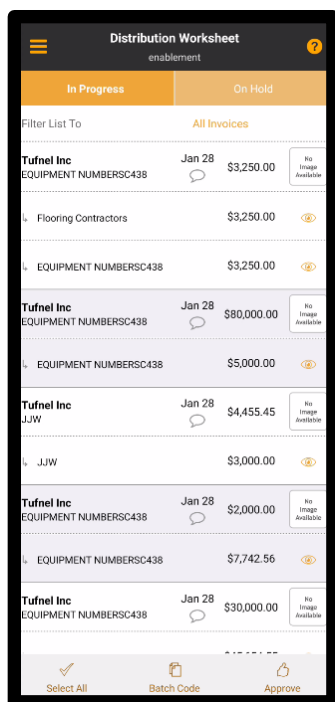


2. Snap the picture from the mobile device.
3. Select OK.
4. Crop as needed.
5. Select OK.
6. Select the Camera  icon at the bottom of the page.
7. Repeat steps 2-6, as needed.
8. Select Done when complete. **Note:** Pictures may be deleted using **X**.
9. Select a Receipt to code and follow the instructions in Coding. See [Coding Invoices](#).

## Distribution Worksheet

The Distribution Worksheet provides a means to code and approve invoices/receipts in batch.

**Navigation: Home Page>Distribution Worksheet.**



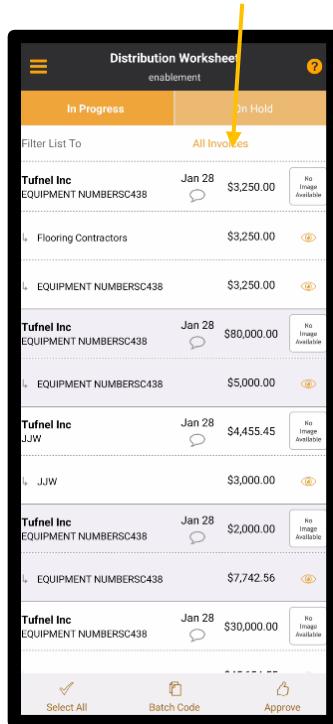
Invoices/receipts may be:

- Filtered by (All Scenarios, Uncoded, Invoices, Credit Card Transactions and Reimbursements) by selecting the name next to Filter List To.
- Viewed by those already In Progress (in the workflow), or by those On Hold with a toggle between the two.
- Coded and edited in batch or individual mode
- Approved in batch or individual mode
- Viewed in detail mode where they can be coded, edited, approved, put on hold, routed, rejected, and disputed.
- Viewed in historical mode and have a note written.
- Generated in PDF form.

## Filtering the Distribution Worksheet

### To Filter Invoices/Receipts on the Distribution Worksheet:

1. Select Distribution Worksheet from Home Page.



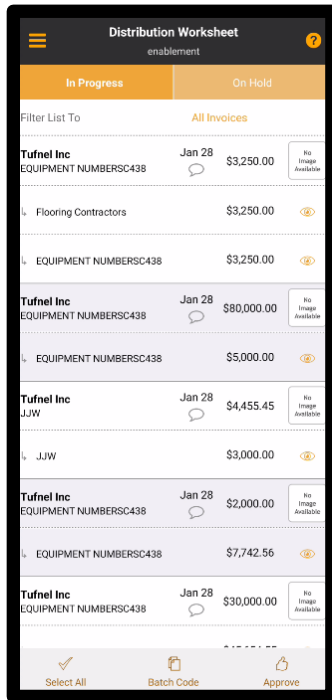
2. Select the name indicated in color next to Filter List To. The name that displays represents the current filter. In this example, All Invoices. Other options are All Scenarios, Uncoded, Invoices, Credit Card Transactions, and Reimbursements.


## Coding from the Distribution Worksheet

Invoices/Receipts may be coded in batch or one at a time from the Distribution Worksheet.

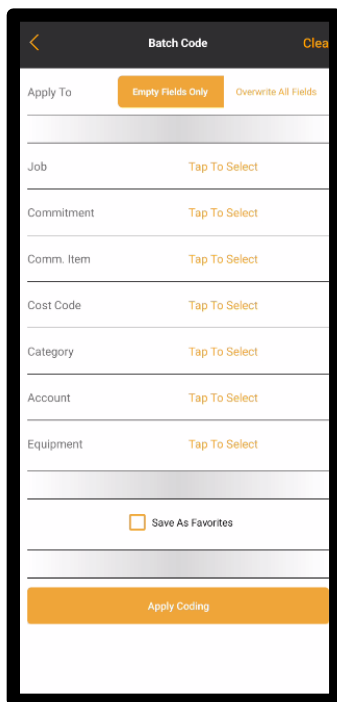
### To Code Invoices/Receipts in Batch or by Single Invoice/Receipt from the Distribution Worksheet:

1. Select Distribution Worksheet from Home Page.
2. Filter, as necessary using Filter List To.



3. Check the row(s) for the Invoice(s)/Receipt(s) to code. The Select All  icon can be utilized to select all Invoices/Receipts.

4. Select the Batch Code  icon at the bottom of the Distribution Worksheet Page.



The screenshot shows a mobile application screen titled "Batch Code". At the top, there is a back arrow on the left and a "Clear" button on the right. Below the title bar, there are two tabs: "Empty Fields Only" (which is selected and highlighted in orange) and "Overwrite All Fields". The main area of the screen contains a list of fields, each with a "Tap To Select" button: Job, Commitment, Comm. Item, Cost Code, Category, Account, and Equipment. Below these fields is a checkbox labeled "Save As Favorites". At the bottom of the screen is a large orange button labeled "Apply Coding".

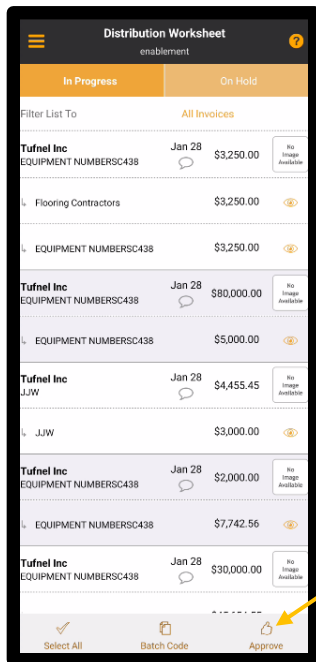
5. Select to Apply to Empty Fields Only (new coding will apply to only those fields that are empty) or Overwrite All Fields (new coding will replace the existing coding in the field). Verify the correct selection is made.
6. Select Tap To Select for each field that requires coding (one at a time).
7. Tap to Select will take the user to a corresponding Master List. For instance, if Job is selected, the user will be taken to a list of available Jobs to select from. Select from the corresponding list.
8. Continue with coding for each field required.
9. To auto-populate future batches with the coding, check Save As Favorites. **Note:** Overwrite All Fields will allow the user to change favorites if not wanted in the future.
10. Select Apply Coding.
11. The new coding will automatically apply.

## Approving from the Distribution Worksheet

Invoices/receipts may be approved from the Distribution Worksheet in batch or individually.

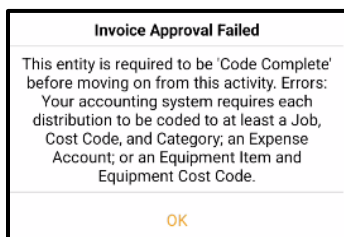
### To Approve Invoices/Receipts in Batch or by Single Invoice/Receipt from the Distribution Worksheet:

1. Select Distribution Worksheet from Home Page.
2. Filter, as necessary.
3. Check the row(s) of the distribution Invoice(s)/Receipt(s) to approve. The Select All  icon can be utilized to select all Invoices/Receipts.
4. Select the Approve  icon at the bottom of the Distribution Worksheet Page



5. The Invoice(s)/Receipts will automatically be approved and moved to the next individual (job role) in the Workflow List.

**Note:** All required coded must be completed. If coding is not completed properly, an Invoice Approval Fail Message will be displayed:



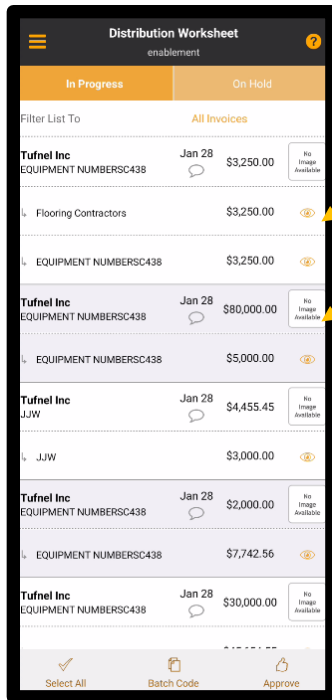



## Editing and Coding the Invoice Detail Page from the Distribution Worksheet

Invoices/Receipts may be viewed, edited, and coded from the Invoice Detail Page via the Distribution Worksheet.

### To View Invoice Details from the Distribution Worksheet:

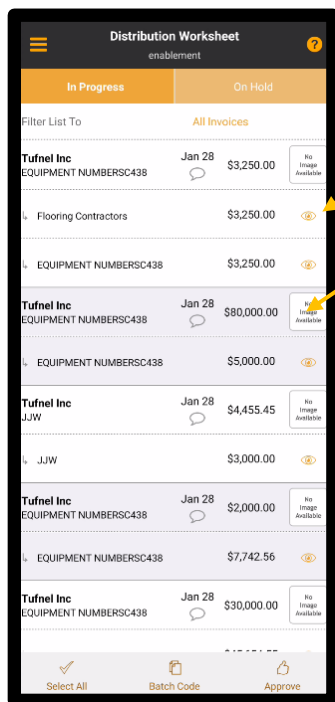
1. Select Distribution Worksheet from Home Page.




2. Select either the Quick Look  icon or the image itself. Either will take the user to the Invoice Detail Page. From there additional features and functions are available. See [Other Tools on the Invoice Detail Page](#).

## To Edit or Code Invoices/Receipts from the Distribution Worksheet:

1. Select Distribution Worksheet from Home Page.




2. Select either the Quick Look  icon or the image. Either will take the user to the Invoice Detail Page.



3. Select the Header or Distribution field to either add to or edit. Scrolling may be required. Enter the appropriate data. This may take the user to an additional page for selection. If so, select from that page.
4. Scroll to the bottom of the page and select Save Changes. Changes will not be saved otherwise.

## Other Tools on the Invoice Detail Page

From the Distribution Worksheet, the Invoice Detail Page can be accessed. There are a variety of tools available to the user from here.

1. Select Distribution Worksheet from the Home Page>specific invoice/receipt.
2. Select either the Quick Look  icon or the image. Either will take the user to the Invoice Detail Page.



This page functions similarly to the Invoice Detail Page (Invoices from the Home Page>specific invoice). Therefore, the features at the top of the page work identically to those from the Invoice Detail Page from Invoices. For Notes, and History, see [Tools Available on the Invoice Detail Page](#).

To Approve, Hold, Route, Reject or Dispute an invoice/receipt, see [The Workflow Approval Process](#).

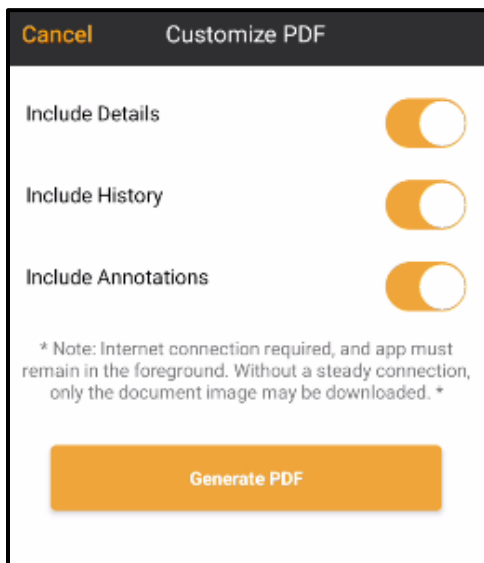
## PDF Generation:

### To Generate a PDF from the Invoice Detail Page via the Distribution Worksheet:

1. Select Distribution Worksheet from the Home Page>specific invoice/receipt.



2. Select the PDF Generator  icon.

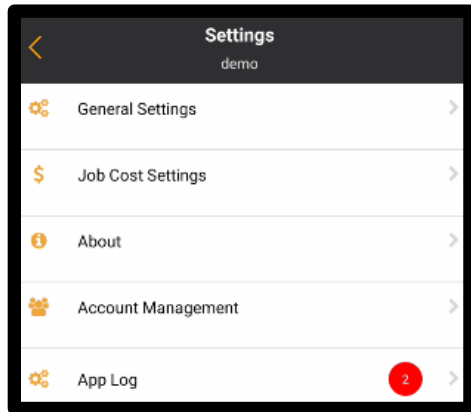



3. Select whether to include details, history and/or annotations or not with a toggle.
4. Select Generate PDF.
5. The PDF can then be shared with others via email or text.

## Mobile Application System Configuration

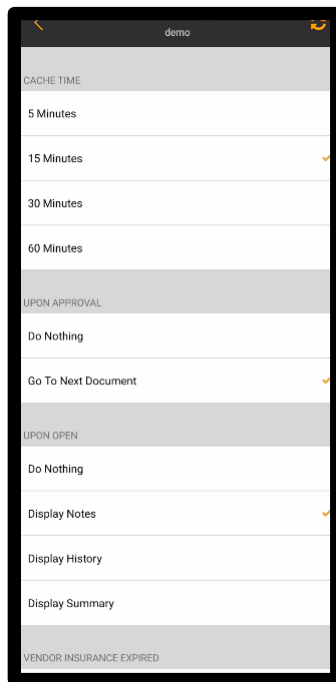
### Document Flow Settings

When Settings is selected from the Home Page, the following menu displays:



Users may not have access to change settings based on permissions granted. If a setting is denoted with a Lock  it is locked, and the user may not change it.

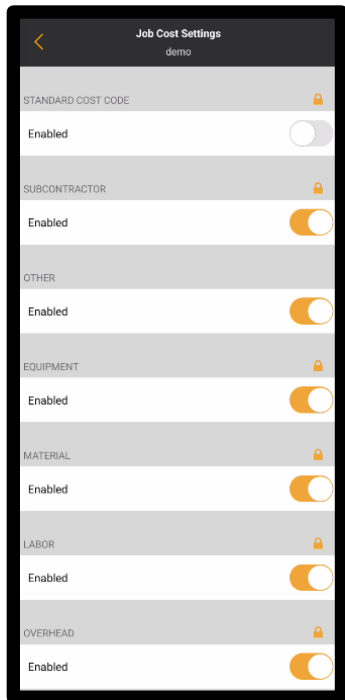
## General Settings



General Settings allows the user to:

- Select a Cache Time, which is the duration of time needed to access data prior to a refresh (5, 15, 30, or 60 minutes).
- Decide what the system will do upon approval of a document (Do Nothing or Go to the Next Document).
- Decide what the system will do upon opening a document (Do Nothing, Display Notes, Display History or Display a Summary).
- Select what should happen when a vendor's insurance is expired (Do Nothing, Display a Warning, or Block Approval).
- Decide whether confirmation should occur upon approval or not.
- Sort documents by Invoice Date (oldest or newest), Job Number or Vendor Name.
- Decide if a warning should be enabled if a commitment is overdrawn.
- Decide whether thumbnail images of the document should be enabled or not.
- Decide whether all activity should be logged or not.
- Decide whether the phone should be locked after idle time or not.

## Job Cost Settings

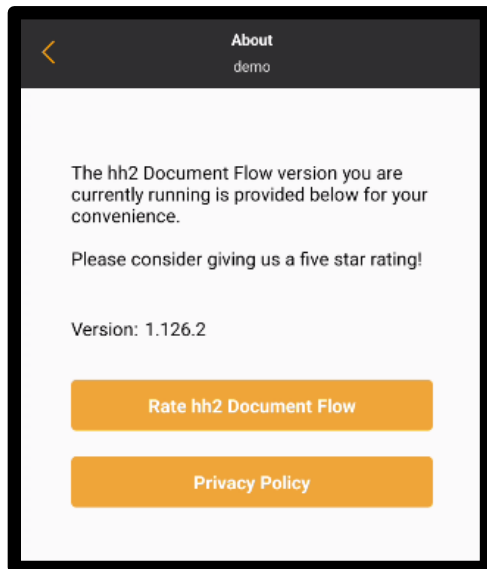


If unlocked, Job Cost Settings allows the user to enable or disable the following:

- Standard Cost Code (allows coding to cost code regardless if they exist on the job yet)
- Subcontractor (allows coding to categories that accumulate as Subcontractor).
- Other (allows coding to cost codes and categories that accumulate as Other)
- Equipment (allow cost codes and categories that accumulate as Equipment)
- Material (allow cost codes and categories that accumulate as Material)
- Labor (allow cost codes and categories that accumulate as Labor)
- Overhead (allow cost codes and categories that accumulate as Overhead)
- Clear Expense Account with Job: If enabled, the user can code to both an Expense Account and Job Cost (Job, Job Cost Code and/or Job Category) within the same distribution. If disabled, the user can only code to an Expense Account or a Job Cost.

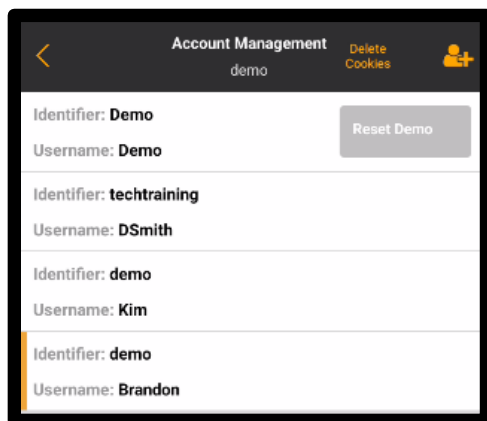


## About



Like Version on the Home Page, About allows the user to see the version of the application currently installed. Here the user may also rate the application and view the Privacy Policy.



## Account Management

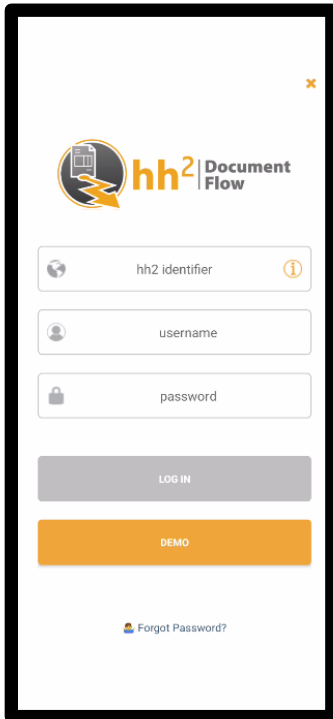


Account Management allows the user to:

- See Users associated with the Identifier.
- Delete Cookies.
- Add New Users, if permitted to do so
- Reset the site.

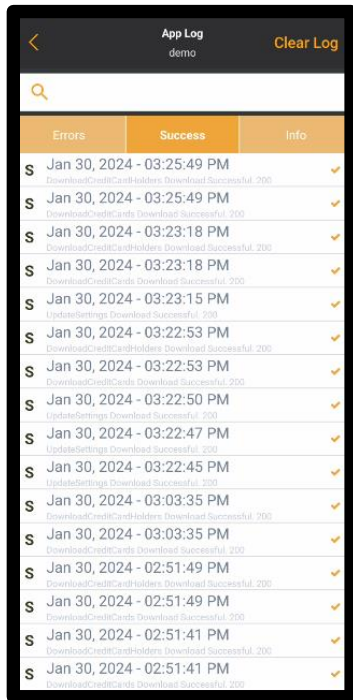
### To Add a New User:

1. Select the Settings  icon from the Home Page.
2. Select Account Management.
3. Select the Add User  icon.



4. Enter the site identifier.
5. Enter the User Name.
6. Enter a temporary Password. The user will have the opportunity to change it, using Forgot Password when logging into hh2.

## App Log:



This page is utilized in conjunction with the hh2 Support Team to assist in troubleshooting any syncing issues. From here, the user may:

- View errors, success, and other information.
- Clear logs

## Summary

After installing the hh2 Document Flow mobile application, the field user can easily capture and upload invoices, receipts paid by credit card and receipts for reimbursements which were paid methods other than the company credit card. This process may be done one at time or by batch. The field user can code invoices and receipts to various jobs, cost codes, and other financial categories based on the construction company's needs. Invoices will then be routed through a Workflow List where they can be placed on hold, approved, rejected, and disputed. Various other tools are available to make the process as easy as possible for the field user.

Please submit any comments or issues regarding this documentation to [documentation@hh2.com](mailto:documentation@hh2.com)

## Change Log

This is the first version of this document, therefore no changes between versions apply.