



Mobile Tools for Document Flow

This guide provides step-by-step instructions on how to use the mobile features of hh2 Document Flow for field-based document uploads to streamline your company's document handoff workflows. Document Flow is a powerful tool that enables your team to upload invoices, receipts, and other documentation directly from mobile devices, streamlining the approval process and improving efficiency. For help with setup or troubleshooting, contact support@hh2.com or your implementor.

Getting Started:

To use hh2 Document Flow from your mobile device:

1. **Download the App**
 - Go to the **Apple App Store** (iOS) or **Google Play Store** (Android).
 - Search for and download "**hh2 Document Flow**".
2. **Login to the App**
 - Open the app and enter your **hh2 Identifier**, **username**, and **password**.
 - On first login, allow the **initial sync** to complete—this may take several minutes depending on your connection.

Uploading Vendor Invoices from the Field

To upload an **AP/vendor invoice** using the mobile app that was received in the field or jobsite from a vendor:

1. Open the **hh2 Document Flow** mobile app and log in.
2. Tap the **menu** icon in the upper left and select **Import Documents** from the menu.
3. Click the plus icon in the lower right and either upload an existing document from your device or take a camera scan of the document.
4. Click **Yes** when asked if you want to upload the Imported Document. Click **No** if you want to wait to send this document to the server later.

5. Once uploaded, the document will be synced to the Document Acceptance menu on the web where the data entry team can prep it for acceptance and route it for approval down the appropriate workflow.

Capturing a Receipt

Receipts can be uploaded as **credit card receipts** (linked to company credit card activity) or as **reimbursement receipts** (for employee out-of-pocket expenses):

Steps to generate:

1. To generate a quick receipt, you can hold down the Document Flow app widget without opening the app which will bring up a menu offering to capture receipt. Alternatively, from within the app, you can go to the Receipts or Quick Receipt menu and add a new receipt.
2. Capture the receipt image and save.
3. Code basic fields for the image such as receipt type (credit card or reimbursement), card, vendor, amount, and transaction date. You can also code the appropriate job costing for the expense here.
4. Click on the save icon in the upper right. This will store the receipts in a receipt queue both on the app and web until such time that receipts are routed through an approval workflow and exported.

Conclusion

hh2 Document Flow mobile tools allow team members to efficiently submit documentation from the field, reducing delays and improving documentation accuracy. Whether capturing vendor invoices or uploading receipts for credit or reimbursement tracking, the mobile app keeps your documentation workflow moving. Reach out to your implementor or hh2 support if you have questions or need advanced configuration assistance. If you find further guidance would be helpful, remember that our [support team](#) and implementation specialists are available to help!