

Support & updates

Getting started Travel planning Event planning Spend management Payments and finance

Set up your Perk account Integrations **Support & updates**

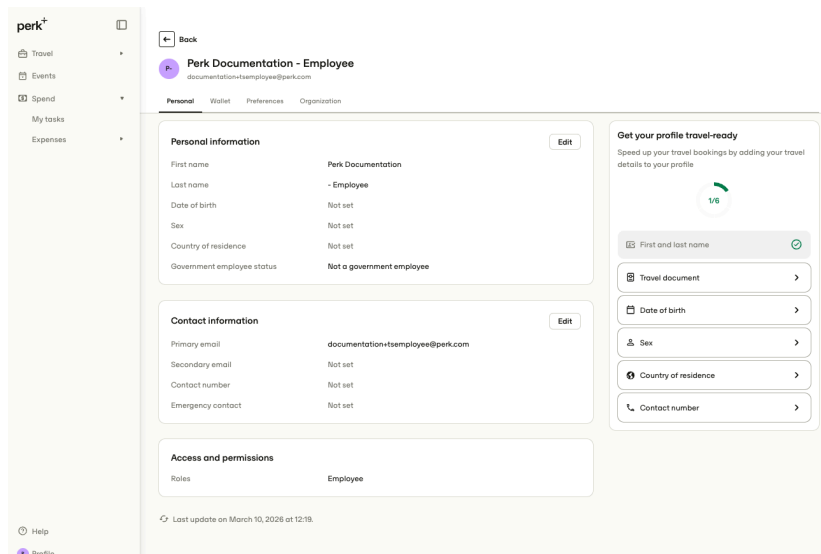
Seamless approvals: from Yokoy to Perk

You'll find Perk isn't too different to Yokoy. When you sign into Perk on the web for the first time, you need to accept the privacy policy.

Checking your profile

Your personal details are found in the profile in Perk, which you can access by clicking your initials in the bottom left corner of the window. You can edit your personal and contact information and settings in the preferences tab only.

All other information can only be changed by the Perk account admin or people manager.



The profile contains three tabs:

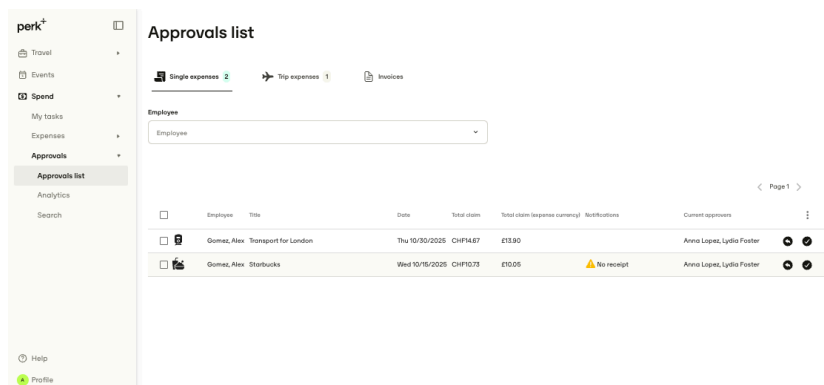
- **Personal:** your full name, the email address you use to sign into Perk, your role.
- **Preferences:** here you can change your language and currency, choose delegates to submit on your behalf, and choose whether to send expense delegates notifications about your pending expenses.

If your company uses Perk to manage travel too, you can [add travel documents](#) to speed up the booking process.

- **Organization:** details of the company you belong to, your line manager, and any employee policies that apply to you. If any of this information is incorrect, contact your Perk account admin.

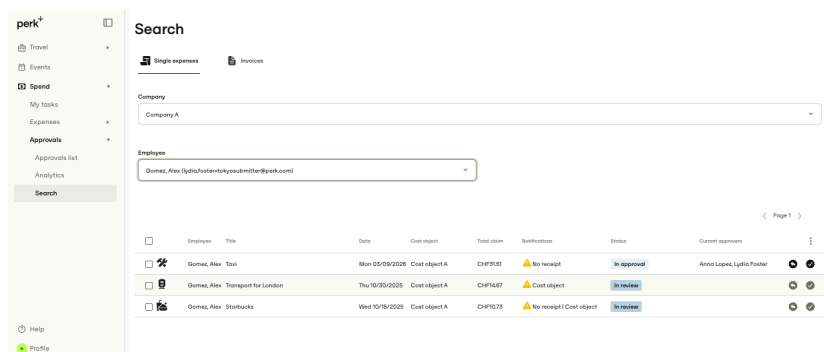
Managing approvals in the web app

In Perk, you can [view all pending expenses, trips and invoices to approve](#) in **Spend > Approvals > Approvals list**.



Like Yokoy, you can choose to approve or send back each individual expense or trip or bulk approve by selecting the expenses to approve and clicking **Approve selection**.

You can [view all approved expenses, invoices and trips](#) in **Spend > Approvals > Search**.



Managing approvals in the mobile app

Instead of using the Yokoy mobile app, now you use the Perk app for booking trips and adding and approving expenses. You can [download the Perk app from the App Store or the Google Play Store](#). Navigating the Perk app is a little different to the Yokoy app. All expenses and invoices are now grouped in the Spend tab.

Yokoy: Approvals tab

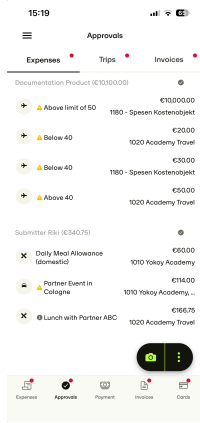
Previously in Yokoy, you accessed all pending approval requests in the **Approvals tab**.

Perk: Spend > Approvals inbox

In Perk, you access approvals in the top right corner by tapping the **Approvals inbox** icon.

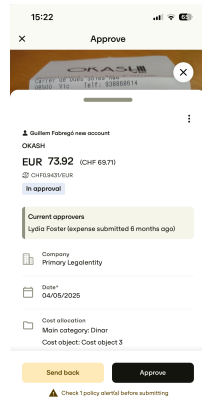
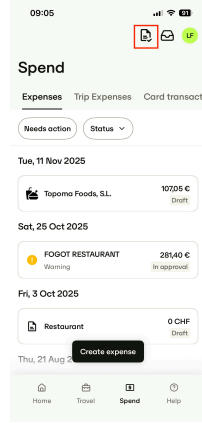
Yokoy: Approvals tab

Perk: Spend > Approvals inbox



The information is then displayed by expenses, trips, and invoices in the same way as in Yokoy.

To approve an expense, trip or invoice, tap **Approve** or **Send back** to reject.



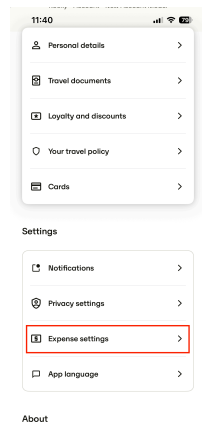
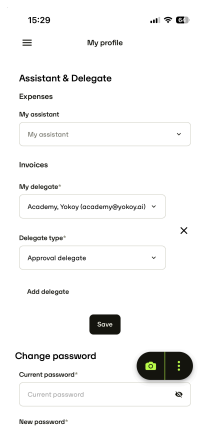
Managing delegates in the mobile app

Yokoy: My profile

Perk: Profile > Expense settings

To assign a delegate to approve on your behalf, in Yokoy you needed to access your profile.

In Perk, tap the avatar in the top right corner and then swipe up to view **Expense settings**.



You can set:

- Expense delegate
- Invoice delegate to submit on your behalf (only in the web app)
- Invoice delegate to approve on your behalf

Was this article helpful?



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