

Support & updates

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Switching to Perk: Flexible travel, controlled spend on the go

As part of a coordinated effort with your account administrator, you'll soon switch over to Perk for expense and invoice processing.

You'll find Perk isn't too different to Yokoy. Here are the key points to help you get started with using Perk.

Signing into Perk

Signing into Perk is similar to the way you did in Yokoy:

perk⁺
Sign in

Email

someone@company.com

Sign in

Sign in with SSO

Sign in with Google

Looking for Yokoy? [Sign in here](#)

Book now, change later. We're flexible.

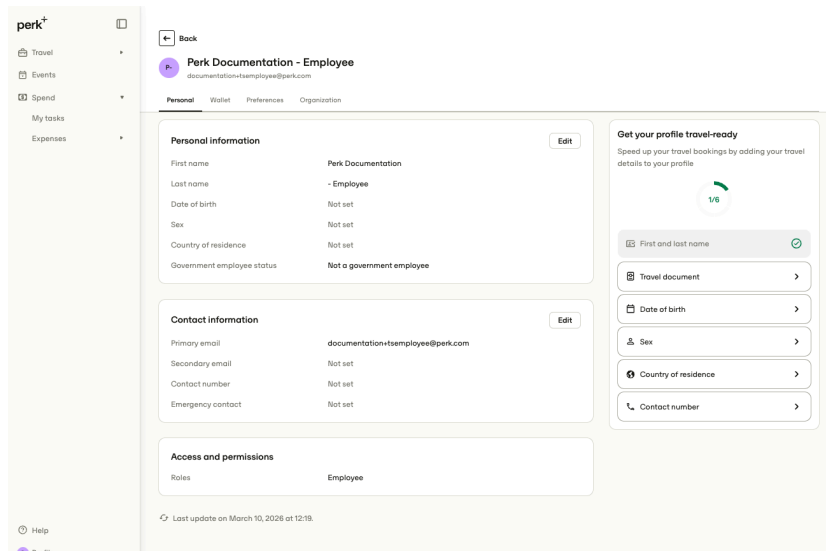


- **SSO or Google:** If your company had set up single-sign on (SSO) or Google, you'll be redirected to your company's identity provider and asked to give your credentials there. Once validated, you'll be redirected back to Perk.
- **Password:** If you signed in using password, you'll no longer need to remember that password. Perk uses one-time passwords, meaning you'll receive a unique code in your inbox that you'll need to enter to sign in.

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.



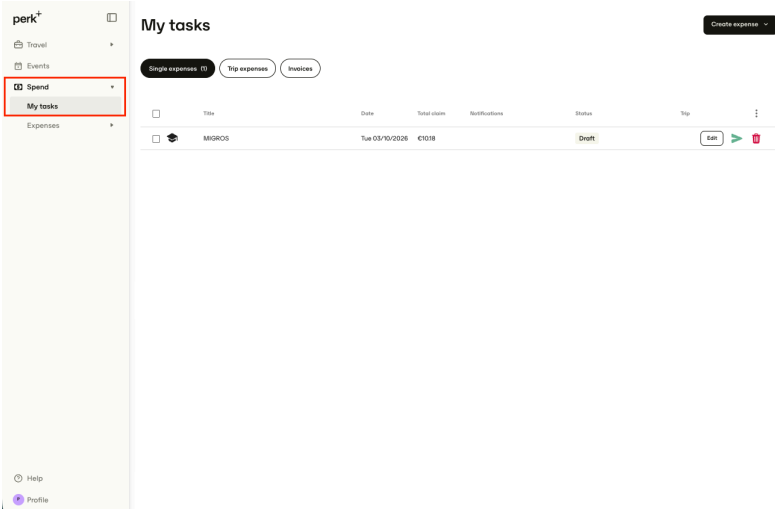
The profile contains three tabs:

- **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 expenses and invoices

[Managing your expenses in Perk](#) is similar to how you did it in Yokoy; the screens are identical, just the way you access them has changed slightly:

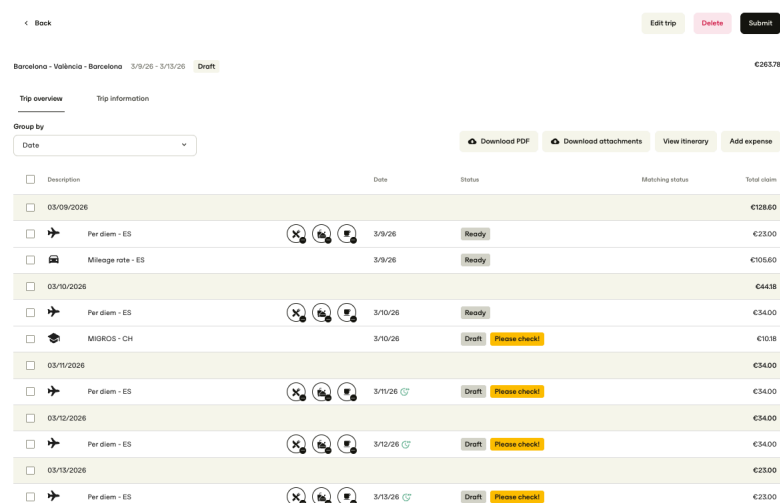
- [Create single expenses, trips or invoices](#) in **Spend > My tasks**. Each tab displays a button in the top right corner to add new expenses, trips or invoices.



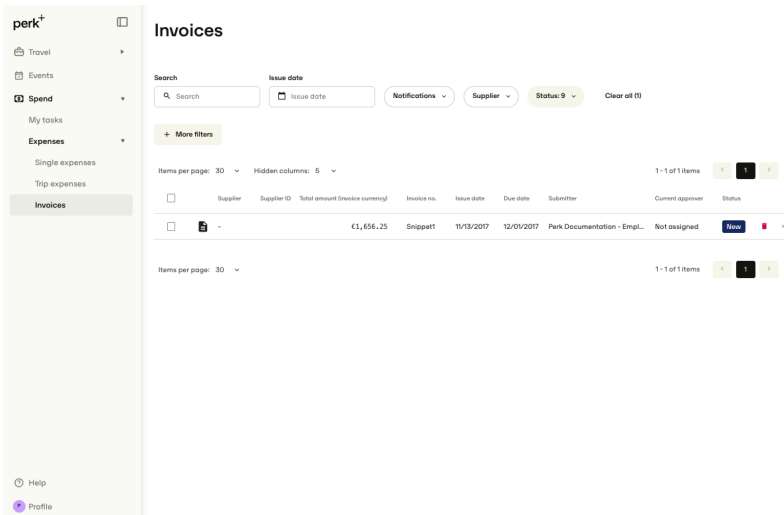
- **View draft or submitted expenses in Spend > Expenses > Single expenses.**



- **Edit, submit or delete your trip expenses in Spend > Expenses > Trip expenses.**

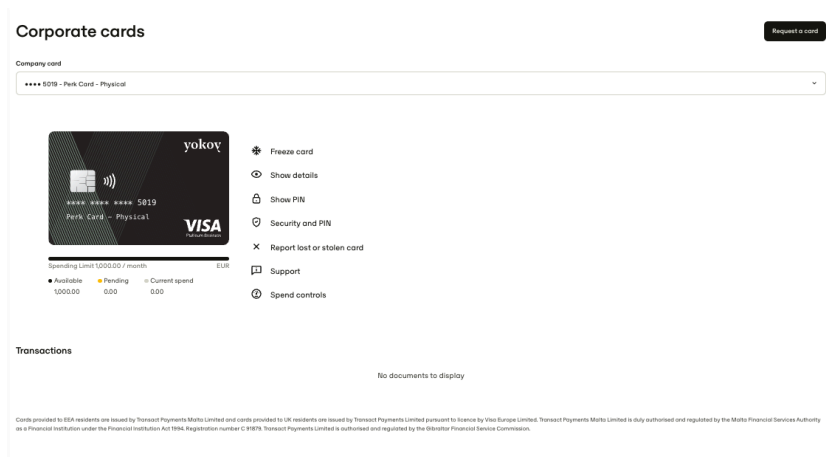


- **Edit or submit your invoices in Spend > Expenses > Invoices.**



Managing your Yokoy Platinum Visa card

You can view your Yokoy card details and transactions in **Spend > Corporate cards**. The page is identical to the one you used in Yokoy:



You can perform the same actions as before in Yokoy:

- [View card details](#), including [your PIN](#)
- [Freeze your card](#)
- [Check your spend controls](#)
- [Report your card as lost or stolen](#)
- [Contact support to report fraudulent transactions](#)
- [View card transactions](#)

Using the mobile app

Instead of using the Yokoy mobile app, now you use the Perk app for booking trips and uploading 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 your expenses are now grouped in the Spend tab. If your company uses Perk for travel too, you'll find all your travel bookings in the Travel tab.

Certain functionality is no longer available in the Perk app:

- **Analytics for submitters:** In the Yokoy app, you could access analytics that showed your expense total amount by expense status. With the Perk app, we've removed this for now as we're working on giving you a better analytics experience.
- **Upload invoices:** For invoice processing, you can now only upload new invoices from the web app; however, if you're a manager responsible for approving invoices, you can still do this in the approvals inbox.
- **Manage expenses as an assistant:** In the Yokoy app you had an option to upload expenses on someone else's behalf. In Perk, you can't perform this task in the mobile app. However you can use your mobile device's external browser.

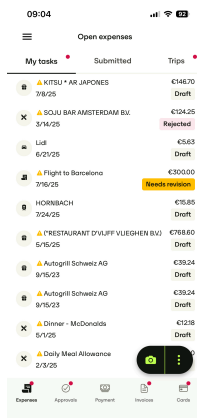
Managing expenses

You'll find your expenses are grouped slightly differently in the Perk app:

Draft expenses

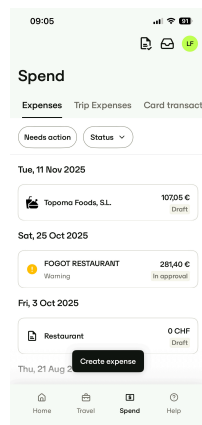
Yokoy - Expenses > My tasks

Shows only draft, rejected or needs revision statuses.



Perk - Spend

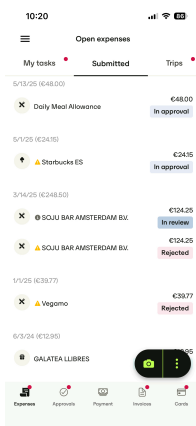
Single expenses, trip expenses, and card transactions available in different tabs.



Submitted expenses

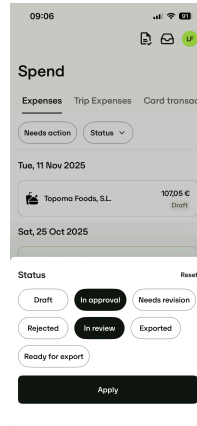
Yokoy: Expenses > Submitted

Shows only in approval or in review statuses.



Perk: Spend > Expenses

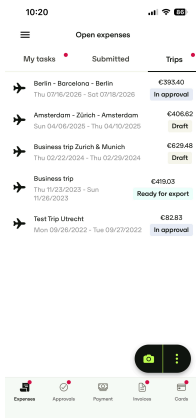
Filters to display expenses by status.



Trips

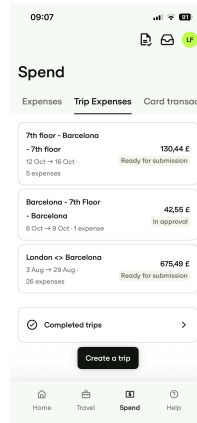
Yokoy: Expenses > Trips

Shows all statuses.



Perk: Spend > Trips

Specific tab for managing trips.

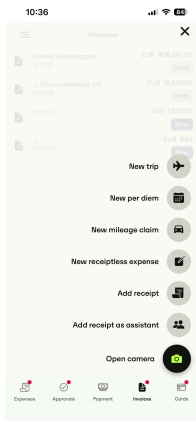


Create expenses

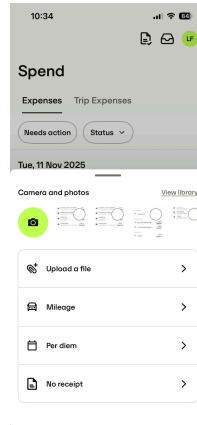
Yokoy: Create expenses action

Perk: Create expenses action

In Yokoy, you created expenses by tapping the camera icon or three dots in bottom right corner.



New **Create expense** button that lets you choose from your photo gallery, capture a receipt, select a file, and create mileage and per diems.

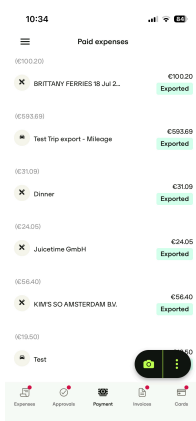


Paid expenses

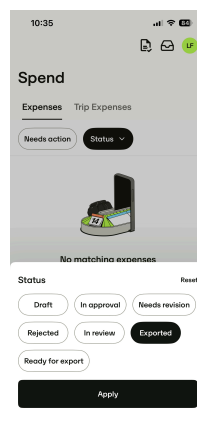
Yokoy: Payment tab or Menu > Archive

Perk: Spend > Expense

View paid expenses in Payment or view exported or rejected expenses in Archive.



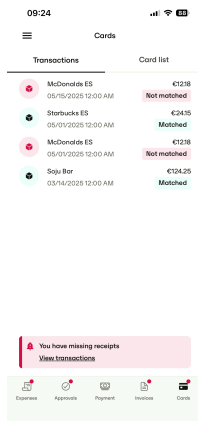
Filter expenses by exported status.



Viewing Yokoy Platinum Visa cards

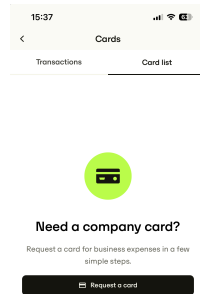
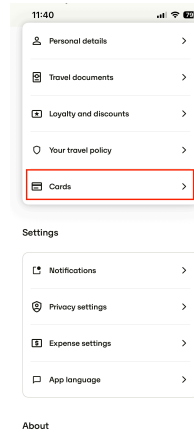
You can view and manage your associated Yokoy Platinum Visa card in the Perk app as you did in the Yokoy app. For greater security, the card data is now available in your profile rather as a separate tab immediately visible.

In Yokoy, you could view your card details and transactions in the **Cards** tab.



You'll see two tabs, **Transactions** and **Card list**, in the same way as you did in the Yokoy app.

In Perk, you'll find this information in your profile by tapping the avatar in the top right corner and swiping up to see the **Cards** section.



Tip: You can also view transactions in **Spend > Card transactions**.

Managing expenses as a delegate

In Yokoy, you could act as assistant for other people, adding receipts on their behalf. In Perk, you can only submit expenses or invoices on another person's behalf in the desktop app; you can't submit expenses or invoices for them using the mobile app.

However, you can use your mobile device's browser to upload expenses:

1. Capture a photo of the receipt.
2. In your mobile device's external browser, go to Perk (app.perk.com).
3. Go to **Spend > Expenses > Delegated expenses** and select the image from your photo gallery.

You assign delegates and decide whether they can submit on your behalf and approve on your behalf where you are responsible for

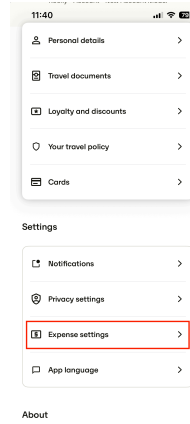
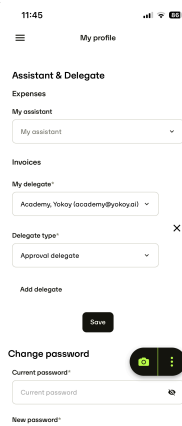
approving other people's expenses and invoices.

Yokoy: My profile

Perk: Spend > Assign a delegate

Tap the menu and then select My profile. In **Assistant & Delegate**, add **My delegate**.

Assign someone else to submit expenses or invoices on your behalf or approve expenses and invoices for you.



Tip: To learn more about how you can process expenses and invoices on the behalf of other people in Perk, see [Manage spend as a delegate for someone else](#).

[Perk User Guide Switching to Perk.pdf](#) 2 MB

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