Moving your review workflow from Yokoy to Perk: Getting started as a financial reviewer

As part of a coordinated effort with your account administrator, you'll soon switch over to Perk for financial review. You'll find Perk isn't too different from Yokoy — your core tasks are the same, and the functionality you relied on is still there. Here are the key things to know to get started.

Finding your financial review pages

In Perk, your main pages are under the **Finance** menu. Use the table below to find where everything from Yokoy now lives.

In Yokoy	Now in Perk
Finance > Review	Finance > Review > Expenses and invoices
Finance > Export	Finance > Review > Export
Finance > Search	Finance > Review > Search
Finance > Analytics	Analyze > Spend analytics

Reviewing expenses and invoices

Reviewing expenses and invoices in Perk works the same way as in Yokoy. Go to **Finance > Review > Expenses and invoices** to see all items waiting for your review. For step-by-step instructions, see Review expenses and invoices.

What's changed from Yokoy

Your role is now called financial reviewer

The Finance role from Yokoy is now called **financial reviewer** in Perk. You'll see this name in settings, approval workflows, and any role-related screens.

Your abilities are on by default

In Yokoy, some abilities — like reverting an export, editing trips, and adding or editing expenses — could be turned on or off per company by your admin. In Perk, all of these are available to financial reviewers by default, across all companies.

Your role applies across all companies

In Yokoy, you could hold different roles in different companies — for example, being a finance user for Company A and finance user and invoice processor for Company B. In Perk, this isn't supported. If you hold two different roles, both must be scoped to the same companies. See Roles and permissions.

Changing spend settings requires an account admin role

Financial reviewers don't have access to spend admin settings in Perk. If you need to change settings like tax rates, expense categories, or cost objects, you'll need an account admin role to do this.

Cost object visibility works differently

Yokoy let admins control cost center visibility by role. In Perk, you can only grant access to everyone or to individual users — there's no role-based visibility option. Only account admins can edit cost object settings.

> **Note:** If your organization used role-based cost object visibility in Yokoy, that configuration won't carry over to Perk. Cost objects can be made visible to all or specific users.

Terminology changes at a glance

Some terms you used in Yokoy have new names in Perk:

In Yokoy	In Perk
Submitter (role)	Employee
Finance (role)	Financial reviewer
Tag	Custom field
Assistant	Expense delegate (submits on behalf)

In Yokoy	In Perk
Delegate	Delegate (approves on behalf)

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