
MOBILE APP - OVERVIEW (CARDHOLDER)

The PEX Mobile App

Cardholders can perform key tasks quickly and easily using the PEX Mobile App.

There are PEX Mobile Apps for Android and for iOS devices.

With the Apps, cardholders can:

- Check card balances
- Attach receipts to transactions
- Review transactions
- Edit or change the cardholder's username, password, and email address
- Call Customer Support from the app

Download the Mobile App (Android and iOS):

- Download the [iOS App from the App Store](#)
- Download the [Android App from the Google Play Store](#)
- The download is free but carrier data rates may apply
- To take advantage of the latest features in the PEX mobile app, a mobile device or operating system upgrade may be required
- If you experience difficulties with the app, uninstall it and then reinstall it, to ensure that the latest version is in use

HOW TO LOG IN TO THE MOBILE APP:

1. Enter the username and password that you use for the Cardholder Site
2. Click "Login"
3. If you do not already have a PEX username and password, then click "First Time Login" on the Mobile App home screen and follow the directions
 - If you are unable to create a Cardholder User Account, please check with your business administrator

HOW TO CHECK YOUR CARD BALANCE:

1. Log into the Mobile App
2. Click the "Account" icon at the bottom of the screen
3. The card balance appears on the first screen

Please Note:

- Your business administrator can also tell you your card balance

HOW TO UPLOAD A RECEIPT USING THE MOBILE APP:

Note: Users can upload a receipt in real time when they are connected to the internet (with the camera function), or save a photo to their image gallery and upload the photo at a later time when they have internet access.

1. Log in to the PEX Mobile App
2. Click on the "Transactions" icon at the bottom of the screen
3. Navigate to the cardholder transaction list
4. Click on the correct merchant transaction for the receipt
5. Click the "Add Receipt" button
 - In Android, it is a green plus sign ("+")
 - In iOS, it is an icon of a receipt
2. There are two ways to attach the receipt image to the transaction
 - Take a photo of the receipt with the camera
 - Use an image of the receipt that's already in your image Gallery
3. Upload the image of the receipt to PEX.

While uploading the image of the receipt, the PEX system will verify:

- That the image format is supported by the system:
 - .PNG
 - .JPG
 - .PDF
- That the file contains no malware or computer viruses
- That the file is not corrupted
- That the file is smaller than 10 MB

HOW TO CODE EACH TRANSACTION:

Transactions require two coding processes – GL Account and District. These are listed under Tags.

1. Log in to the Mobile App
2. Click on the "Transactions" icon
3. Click on the transaction
4. Click "Add" beside Tags
5. Select drop down from GL Account
6. Select drop down from District

7. Save and submit
8. You may also split your Tags
9. Clicking “Split gives you the option to split one transaction to multiple GL accounts and districts
10. Save and submit

HOW TO ADD NOTES TO A TRANSACTION:

11. Log in to the Mobile App
12. Click on the "Transactions" icon
13. Click on the transaction
14. Click on the "Note" icon
15. Write the note
16. Click "Done"
17. The Note is added to the Transaction Details

HOW TO REVIEW TRANSACTIONS:

1. Log in to the Mobile App
2. Click the "Transactions" icon at the bottom of the screen
3. See transactions by month for the last 12 months

HOW TO EDIT OR CHANGE YOUR USERNAME:

1. Log in to the Mobile App
2. Click the "Settings" icon at the bottom of the screen
3. Click "Account Settings"
4. Click "Edit" after Username
5. Enter current password
6. Enter and re-enter new Username
7. Click "Save" to confirm the changes

HOW TO EDIT OR CHANGE YOUR PASSWORD:

1. Log in to the Mobile App
2. Click the "Settings" icon at the bottom of the screen
3. Click "Account Settings"

4. Click "Edit" after Password
5. Enter the current password
6. Enter and re-enter the new password
 - Follow the system requirements
2. Click the "Save" button to confirm the new password

HOW TO EDIT OR CHANGE YOUR EMAIL ADDRESS:

1. Log in to the Mobile App
2. Click the "Settings" icon at the bottom of the screen
3. Click "Account Settings"
4. Click "Edit" after Email
5. Enter your new email address
6. Click the green "Save" button to confirm the change

HOW TO CALL CUSTOMER SUPPORT:

1. Log into the Mobile App
2. Click the "Settings" icon
3. Click "Support"
4. Click "OK" to call PEX Customer Support