

Float Mobile App

The Float mobile app allows Spenders to view card balances and details, add receipts and code transactions and more.

The Float mobile app is Spender-focussed; Administrator and Manager functions are available on app.floatfincial.com.

Installation and Access

Downloading the Float app

- [Download for iOS devices from the Apple App Store](#)
(requires iOS 15 or later)
- [Download for Android devices from the Google Play Store](#)
(requires Android OS 9 or later)



Logging-in to the Float app

To log in to the Float mobile app, use the same credentials you use to access app.floatfinancial.com. If you're not sure what those are, contact the administrator at your company who provisioned your Float user account.

You will be required to complete [multi-factor authentication](#) in order to access your account (or configure it, if this is your first time logging-in).

To log-out, tap your profile icon in the upper-left corner > Scroll to the bottom of the page > Tap "Logout"

Using Biometrics (FaceID/ Fingerprint)

You can use biometrics to log in after providing consent, either during the initial upfront login process or by going to Settings and toggling Face ID on.

You will still be prompted to re-authenticate using your email/password credentials from time-to-time.

Float does not store your biometric data.

Working with Cards on the Float app

Viewing and accessing cards

Active virtual and physical cards are accessible from the mobile app. Virtual cards are white/gray and physical cards are black. Simply swipe through the cards carousel on the home page to switch the visible card.

Tap the Cards icon on the bottom row to see a list of cards.

Viewing Card Details

Tap any card from the home page carousel or from the Cards list. At the top of the page, you will see the card's Available spending power.

Tap the "Show _ active limit(s)" drawer below the card image to expand the view of active limits.

Tap Card Info to view the card number, billing address and other details (re-authentication may be necessary).

For physical cards, you can tap PIN to view the current PIN. The PIN can only be changed from app.floatfinancial.com.

See: [Resetting a PIN on a Physical Card](#)

Can I add my Float card to a mobile wallet from the Float app?

No, you cannot push your card to your mobile wallet from the app.

However, by opening the "Card Info" tab on a specific card's overview page, you will be able to see and copy the card information to make setting your card up in your mobile wallet quick and easy.

See: [Adding Float Cards to Mobile Wallets](#)



Working with Transactions on the Float app

Updating transaction information

To update information on a transaction, simply select the transaction and click on the field you'd like to input (e.g. Description, GL Code, Receipt, Tax Code, Vendor or other Accounting Fields). You can also tap to add Receipts or other Supporting Documents.

Adding Receipts

Match a receipt to a transaction through the Float mobile app via three paths:

- Select the “+” button on the bottom navigation bar and tap “Snap a receipt”. Your device's camera will open and you can capture an image directly.
- Open a transaction and select “Add Receipt”. You can take a picture of the receipt or upload an existing photo/file from your phone.
- Open the [push notification](#) you receive following a successful transaction to go directly to that transaction, where you can add a receipt and complete other fields

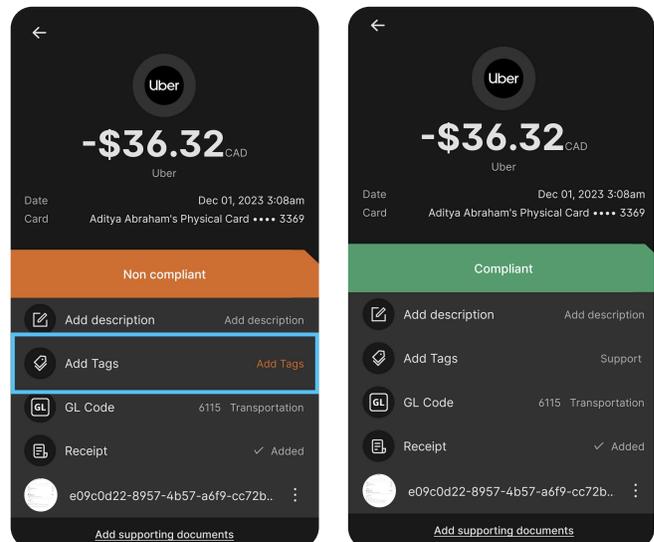
To unmatch a receipt, select the transaction and swipe left on the three vertical dots next to the receipt ID.

Working with non-compliant transactions

A non-compliant transaction is a transaction that does not meet the requirements of the [Submission Policy](#) associated with your card. A Submission Policy is defined by your business' Float Admins and dictates which information and/or attachments are required on each transaction.

For example, if the submission policy associated with your card requires you to upload a receipt with every transaction, your transaction will be marked as non-compliant in the mobile app until you have uploaded the relevant receipt.

Non-compliant transactions are highlighted in orange, and the required fields have red text to indicate that they are missing information.



Settings and Localization

Enabling Push Notifications

Tap your profile icon in the upper-left corner > Notifications > toggle on "Allow push notifications"

All notifications that your business has enabled will be delivered via push to your mobile device. These will replace email or SMS notifications.

Administrators can control which types of notifications are sent to their users.

See: [Managing Business Notifications](#)

Using the Float app in French

Simply switch your device's language to French (Canada) to view the app in French.

Why are my Push Notifications not showing up in French?

Float's push notification platform sets the language based on the most recently logged-in device's language. If you log-in to Float on an English device, all of your devices will get English pushes. If you log-in on your French device, all of your devices get French pushes. To update the language of your push notifications, simply change the language of your phone, logout of the app and log back into your account.

User account information

User account information cannot be updated from the mobile app. Updates to account information must be done via app.floatfinancial.com.

Does Float track my location?

No, Float does not actively track your location using the application.

Accessing Support

Tap your profile icon in the upper-left corner > Support, choose to visit the Help Centre or contact support via another method.