FOR EXTERNAL USE

Corpay

Release Notes – 08/08/24

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Corpay Release Notes

Corpay is pleased to announce the release of the following items on August 8th, 2024:

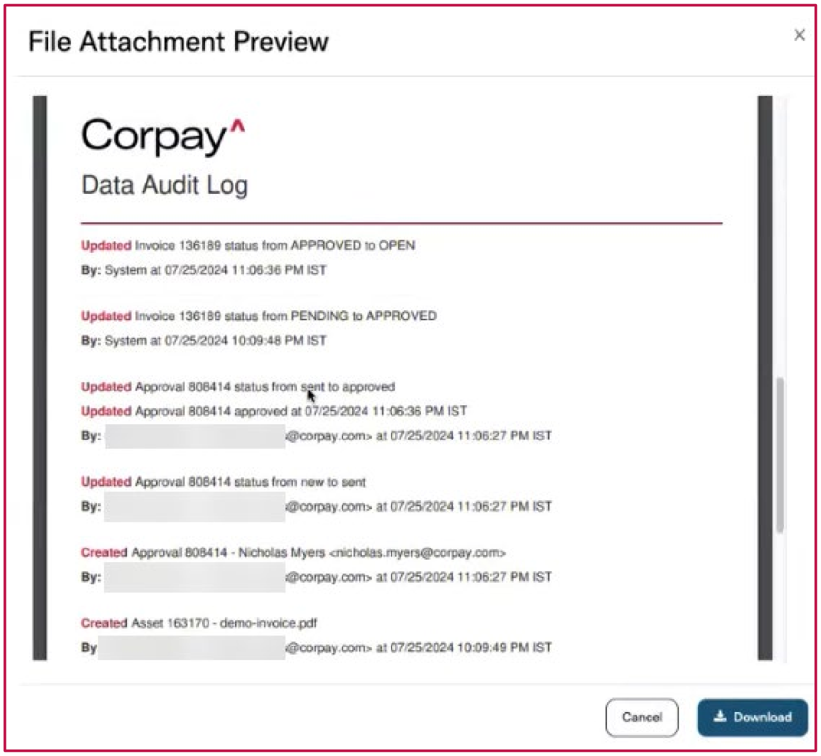
Overview - Corpay Complete

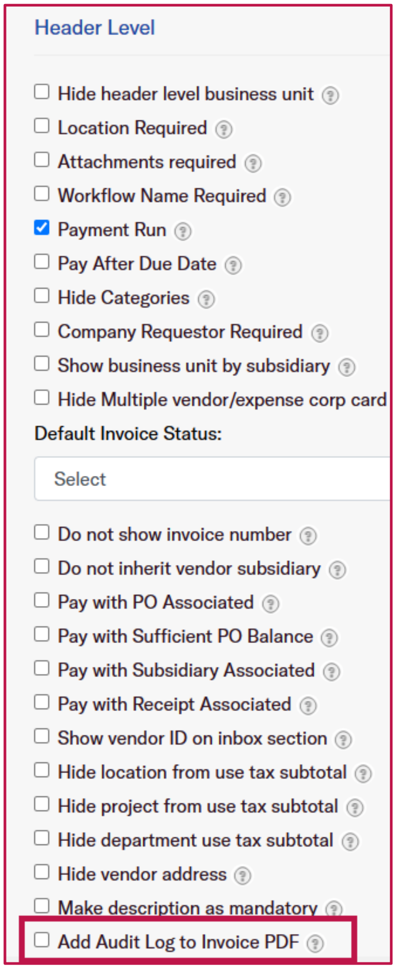
Improvements

Invoice Automation and Purchase Order Improvements

- Users may now add **Audit Log** entries to the PDF of their **Approved** invoices so they can review activity history without having to log in to Corpay Complete. In the following example, the Audit Log was appended to an invoice after it moved to an **Approved** status.

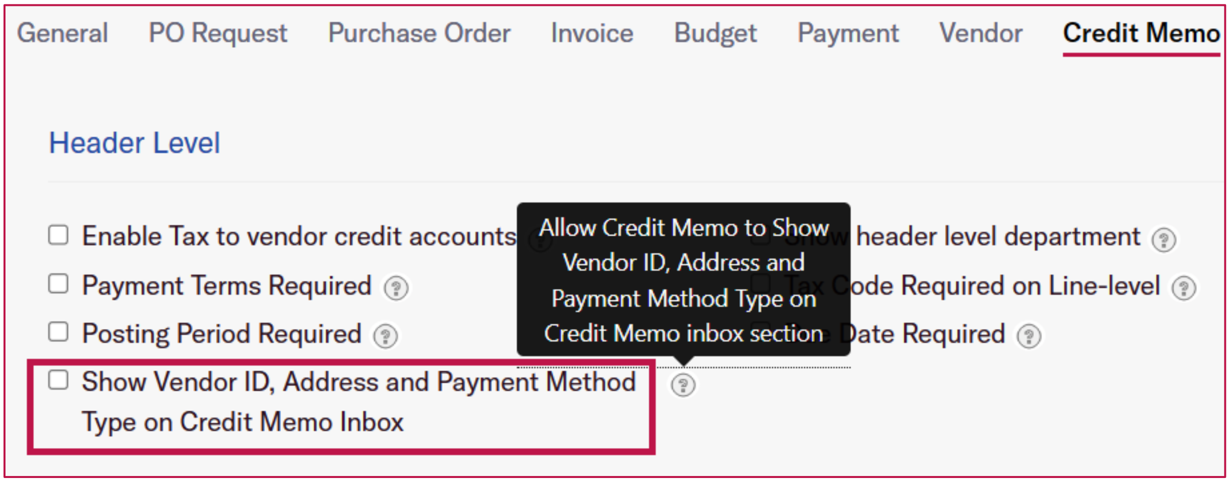
  To enable this feature, navigation to the *Administration* module > *Settings* tab > *Company Default* tile > *Invoices* tab and check the **Add Audit Log to Invoice PDF** checkbox. Note that this feature is not retroactive, meaning **Audit Logs** will not be added to invoice PDFs that were approved before the **Add Audit Log to Invoice PDF** checkbox was selected.





- With this enhancement, implementation team can configure Default Coding for custom fields using an admin form. The new default custom fields will then be visible on all invoice, purchase order, payment, expense, and credit memo forms.
- With this enhancement, users can inherit free text (non-catalog) items from a purchase order to an invoice. This setting is enabled by default and can be disabled by selecting the **Disable free text items** checkbox on the *Administration* module > *Settings* tab > *Company Default* tile > *General* tab.

- The **Edit Credit Memo** form of the *Credit Memo Inbox* was aligned with the **Edit Invoice** form of the *Invoice Inbox* by adding standard fields and action buttons to make the user experience consistent across both modules. These updates include adding a new **Show Vendor ID, Address and Payment Method Type on Credit Memo Inbox** setting on the *Administration* module > *Settings* tab > *Company Default* tile > *Credit Memo* tab.



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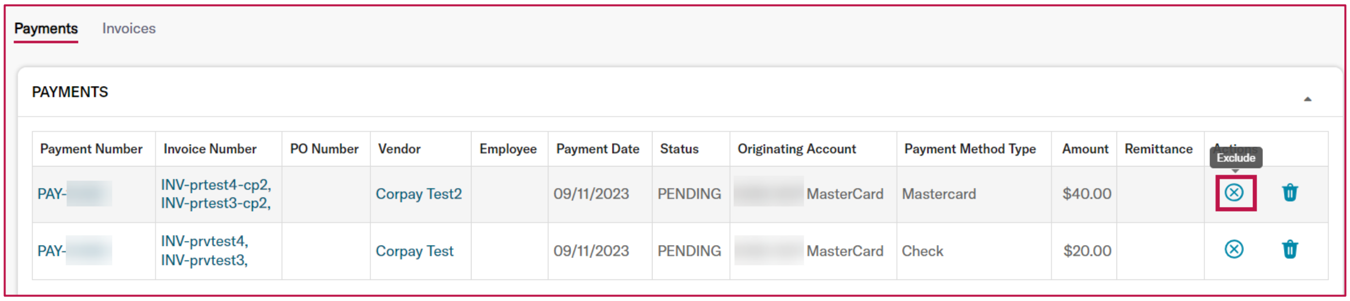
Payments Automation Improvements

- For ease of use, file integration customers may include updates to their vendor data within their Vendor and Payment files.
- Previously, users could only approve or reject a full payment run batch. Users may now exclude individual payment(s) and send the others for processing using the new **Exclude** button on the *Payment Run Approval Details* page. Invoices connected to excluded payments will be returned

to the Invoices module where they may be edited or added to a different payment run.



- Because the **Void** option is now available for payment runs, the **Delete** option has been removed.
- File integration customers may now send negative invoices within their files for credit memos.

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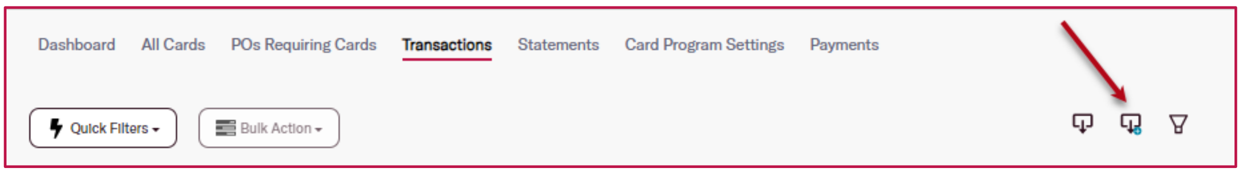
Card Improvements

- With this change, the *Card Bulk Upload* template was updated to make it easier for internal and external users to determine which fields are required. The *Help* tab was also expanded in the template to include additional definitions and examples for each field.
- With this change, the statement-generated email that goes out to card admins when a card invoice is issued is updated. The change includes updating the text on the *Card Statement Ready to Review* email notification to include the amount and due date of the statement.
- With this improvement, an email notification that goes out to cardholders when they have used 80% of their credit limit is added.

- With the update, an email notification will go out to cardholders if their transaction is declined. The email notification includes the date, merchant, and amount of the declined purchase.
- With this change, the *Card Issued* email that goes out to card admins when a new card is issued is updated to show the subject line as "*New Card has been Issued.*" The email template is also updated to include instructions on enrolling for Alerts and Notifications.
- With this improvement, a new *Export All* option was added to the *Transactions* grid. This new option allows card admins to export all transactions from the *Transactions* grid into one file as a report instead of being limited to 250 records or one page of results at a time in the *Transactions* grid view. The report includes all filters applied to the Transactions grid, as well as the columns and column order present in the Transactions view. This change is highly beneficial to internal and external users because it eases up the manual process of exporting large amounts of data.



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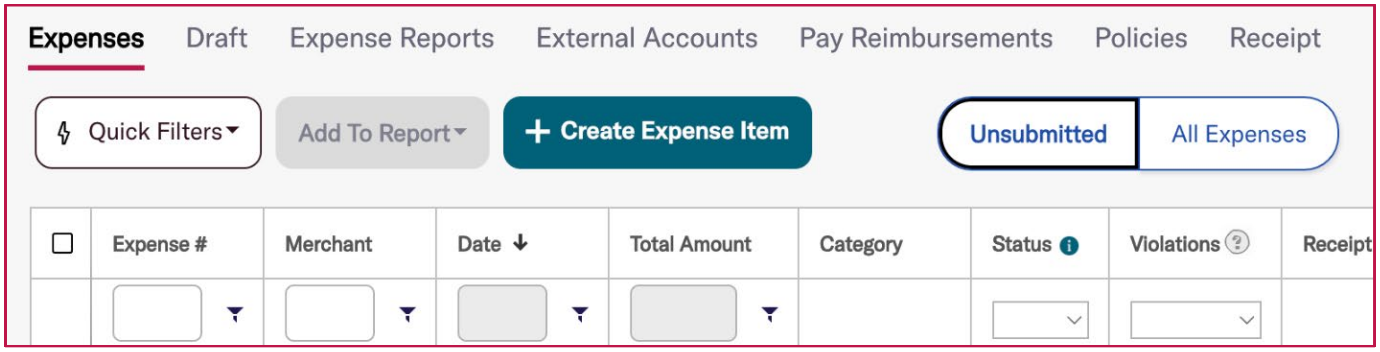
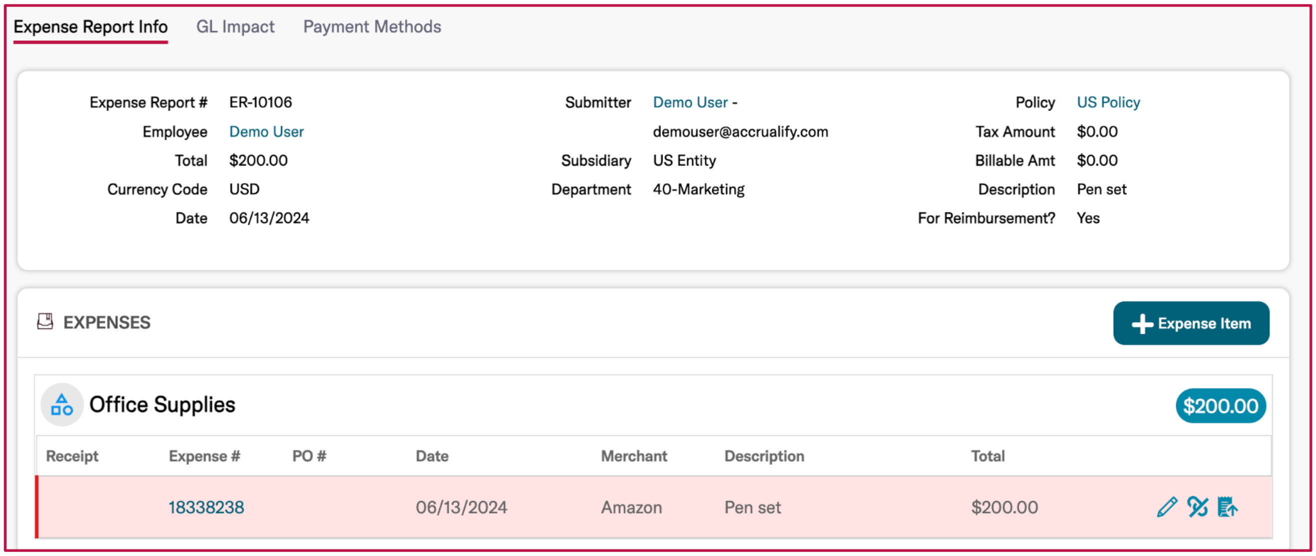
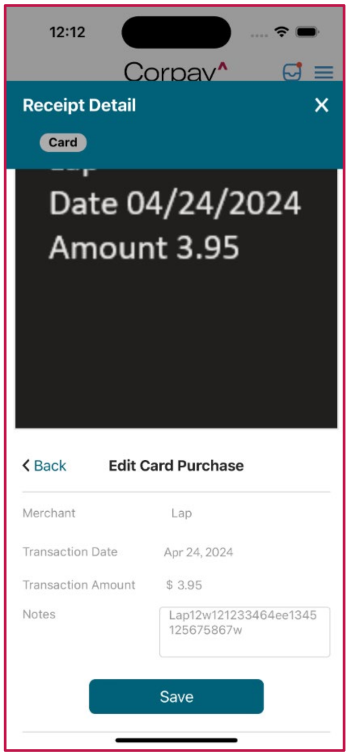
Expense Improvements

- With this change, a new *Hide Create Expense Button* company setting was added that enables/disables the option to manually create expense items throughout the application. This change is relevant because all expenses should be coming through automatically from the cleared transactions. For this reason, a new company setting (under expense) was added to hide the create expense button from the following screens. *Please note that this new setting is* *more dependent on the customer's expense process, whether or not they want to allow users to submit reimbursable expenses using their own card/cash or if they are restricted to only using company cards at all times.*

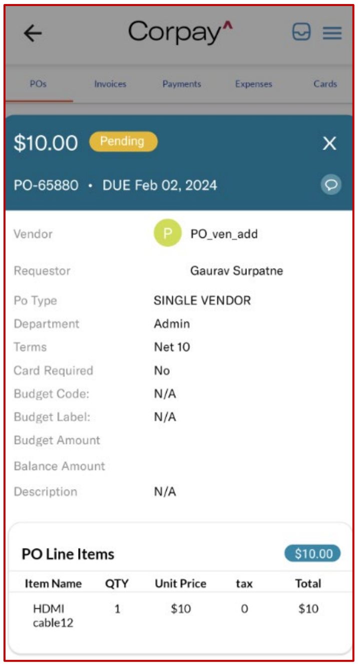




- With this update, data from receipts matched to authorized card transactions will now populate in the *Receipt Detail* page on the mobile app.



- With this improvement, the text on the *PO Approval Detail* screen was updated to say "Card Required" instead of "Vcard Required."



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Issues

Payments Automation Issues

- An issue was resolved that prevented discounts from being passed to Full AP payments when payment runs were submitted for processing.
- An issue was fixed that prevented vendor contacts from receiving email notifications for their payments.

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Expense Issues

- Fixed a bug where inactive categories could be selected when adding categories to an expense policy via the *Edit Policy* page.

- Fixed a bug where the *Accounts* tab was blank on the *Expense Approval Details* page.
- Fixed a bug on Android devices where "Supporting Document" populated twice in the *Description* field when creating an expense item from the *Receipt Details* page.
- Fixed a bug in the mobile app where typing * to do a global search in any of the search fields caused the app to crash.
- Fixed a bug on the Expenses grid where selecting all records using the checkbox in the upper left corner of the grid resulted in a No Expense Item Selected error when trying to create an expense report from the Add To Report dropdown.

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