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Corpay Release Notes

Corpay is pleased to announce the release of the following items on 09/27/24 and 10/08/24:

Overview - Corpay Complete

Invoice Automation and Purchase Order

Improvements

Deployment Date: 10/08/24

- A new feature has been added that enables the Operations team to customize any standard Corpay Complete labels to match customers' ERP system labels via a new *Administration* module > *Form Configuration* tab > *Custom Labels* tab. This enhancement gives customers greater flexibility and customization options when integrating with systems.

Approval Settings Categories MCC Defaults Activities Catalogue Items Bulk Operations Bulk Operations 2.0 Bulk Operations Mapper **Form Configuration**

Fraud Audit Settings

Fields Hierarchies Templates Default Rules **Custom Labels**

Custom labels are used to customize the labels on forms. You can add, edit, or delete custom labels here.

Field Name*	Custom Label *	Enabled	
Budget(s)	Budget(s)_42	<input checked="" type="checkbox"/>	
Department	Department100	<input checked="" type="checkbox"/>	
Description	Description123	<input checked="" type="checkbox"/>	

Issues

- An issue was resolved on the *Invoice Details* page > *Accounts* tab so that **Expense Lines** display in ascending order, from oldest to newest.
- Users could not delete a single address on the **Vendor Location** tab without deleting all addresses. This issue has been resolved, allowing users to delete individual addresses as needed.
- The **Budget Required** setting was not taking precedence over the **Hide budget field** setting. This issue has been fixed so that the **Budget Required** setting now overrides the **Hide budget field** setting.

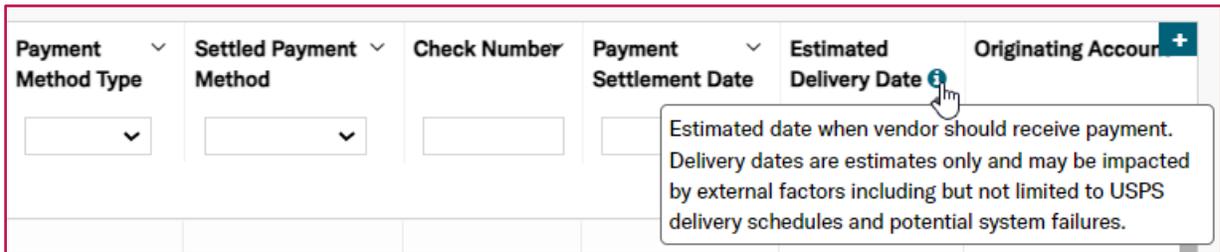
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Payments Automation

Improvements

Deployment Date: 10/08/24

- The Payments module now includes a tooltip for the **Estimated Delivery Date** to explain its purpose more clearly.



Issues

Deployment Date: 9/27/24

- An issue was resolved where payment statuses were not updated if the *Payment Method* was **Inactive**.
- Payments flagged with a system processing error will no longer display as failed.

Deployment Date: 10/08/24

- The *Dashboard* page > *Payment Actions Required Today* section > **Payment Runs Requiring Others' Approval** link was corrected to display details for pending approvals for the individual that

submitted the run.

- An issue was fixed where an **Approval Date** displayed even when a payment run was rejected or failed.
- The title of the **Add Payment Method** pane was incorrectly displayed as **Edit Payment Method**. This issue has been corrected to ensure the title accurately reflects the action being performed.
- The **Approvals Dashboard** filters were showing incorrect cumulative counts of active approvals. This issue has been fixed, and the total approval count for all modules is now accurate.
- When adding a new invoice to a payment run, Corpay Complete was only displaying 100 invoices, excluding others beyond this limit. This issue has been resolved to ensure all invoices are displayed.
- Corpay Complete was creating duplicate payments when payment dates for invoices were set to different future dates. This problem has been fixed to prevent duplicate payments.
- Payment runs submitted manually were displaying an incorrect status. This issue has been resolved to ensure the correct status is shown.
- After resubmission, payment runs were showing an incorrect status. This issue has been fixed to display the correct status after resubmission.
- An issue was resolved where voided payments were not updating correctly in Corpay Complete.
- Payment runs became stuck in a **Submitted** status if they were resubmitted with an excluded invoice. This issue has been resolved to ensure payment runs proceed correctly.

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Card

Issues

Deployment Date: 10/08/24

- Fixed an issue where recent card statements weren't showing up for some customers in the Statements tab.
- Fixed a bug on the Transactions grid where date filters weren't including results for the end date of the selected date range.

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Expense

Improvements

Deployment Date: 10/08/24

- Users are now able to split their expenses in Corpay Complete using the new Split Expense functionality. The new functionality has been added on both the web and mobile app platforms. Several changes have been made in relation to Split coding, including the following:
 - The Create and Edit Expense Item forms have a new Expense Allocation section at the bottom of the page. This includes all of the "coding" fields, such as Category, Project, Business Unit, Department, and Location; metadata, dynamic coding, and custom fields, which will display if configured. This section is visible for everyone, whether split expenses are enabled or not.

The screenshot shows the 'Expense Allocation' form. It includes several dropdown menus: 'Category*', 'Project', 'Department*', 'Business Unit*', and 'Location*'. Below these is the 'Additional Required Information' section, which contains a 'Capex Category' dropdown. Underneath is the 'Additional Coding Fields' section with a 'Select One' dropdown. At the bottom left of the form is a new 'Split Expense' button. At the bottom right are three buttons: 'Cancel', 'Save Draft', and 'Create Expense Item'.

- Under the Expense Allocation section, a new Split Expense button allows users to add split coding allocations to their expenses. This button is enabled/disabled via new company setting "Enable Split Expenses".

This is a close-up view of the 'Expense Allocation' form. It highlights the 'Location' dropdown menu, the 'Additional Coding Fields' section with its 'Select One' dropdown, and the 'Split Expense' button, which is enclosed in a red rectangular box. The 'Cancel', 'Save Draft', and 'Create Expense Item' buttons are also visible at the bottom right.

- After clicking the Split Expense button, a new modal will display including all of the split coding functionality. The fields from the Expense Allocation section will populate and users can enter their coding selections and add splits based on amount or percentage. There are validations in place to make sure that the totals of all splits equal 100% before the coding can be saved and applied to the expense.

Category*	Department*	Location*	Business Unit*	Project	Amount*	Percentage*
Cellular Ph... v	Admin v	01: San Fran... v	Consumer G... v	Select v	\$ 50	50 %
Maintenan... v	Manufacturing v	02: Boston v	Hardware v	Select v	\$ 50	50 %

- After expense splits are saved, they will be visible in a table on the Create or Edit Expense Item page - the Split Expense button will change to Edit Splits once the allocations have been saved and will direct users back to the modal if any changes need to be made.

Expense Allocation						
Category	Department	Location	Business Unit	Project	Custom Fields	Allocation
Cellular Phone	Admin	01: San Francisco	Consumer Goods			\$50.00 / 50.00%
Maintenance and repairs	Manufacturing	02: Boston	Hardware			\$50.00 / 50.00%
Total						\$100.00 / 100.00%

- A new Expense Allocation section was also added to the Expense Item Details page, where coding allocations saved to the expense can be viewed along with the rest of the expense details.

Expense Items / Expense Item Details

83334 NEW

Merchant: Demo split 1
 Policy: LIC
 Currency Code: USD
 Item Type: SINGLE_EXPENSE
 Submitter: Automation QA
 Submitted On Date: 08/22/2024
 For Reimbursement?: Yes
 Expense Report #: ER-102668
 Transaction Date: 08/22/2024
 Expense Amount: \$100.00
 Tax: \$0.00
 Total: \$100.00
 Employee: Automation QA
 Subsidiary: Honeycomb Mfg.
 GL Impact: 6120 - Meals & Entertainment
 6266 - Telephone Expense - Cellular

Drop file here
or

EXPENSE ALLOCATION

Category	Department	Location	Business Unit	Project	Custom Fields	Allocation
Cellular Phone	Final Department Pull	01: San Francisco : Test	Corpay Complete (Nagpur)	AIM Accounting		\$16.00 / 16.00%
Meals & Entertainment				AMG Inc		\$84.00 / 84.00%
Total						\$100.00 / 100.00%

- The Expenses section was redesigned on the Expense Report Details and Expense Approval Details pages to allow for bulk actions on unlinking expenses and removing receipts. This redesign also included an expand/collapse option on each expense line to be able to view split coding allocations on the expenses.

ER-102671 PENDING APPROVAL

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Expense Report Info [GL Impact](#) [Payment Methods](#)

Expense Report # ER-102671	Submitter Automation QA	Policy LIC
Employee Automation QA	Subsidiary Honeycomb Mfg.	Tax Amount \$0.00
Total \$1,200.00	Business Unit Business Unit on 1	Billable Amt \$0.00
Currency Code USD	Department 10-Revenue	For Reimbursement? Yes
Date 08/22/2024		

EXPENSES [+ Add Expense](#)

[Remove from Report](#) [Delete Receipt](#)

Receipt	Expense #	Date	Category	Merchant	Description	Total
<input type="checkbox"/>	83369	08/22/2024		Split demo 4		\$100.00
Expense Allocation						
	Category	Department	Location	Business Unit	Project	Allocation
	Cellular Phone	Manufacturing	01: San Francisco : QA Hold : Test			15% / \$15.00
	Meals & Entertainment	Engineering : Aeronatics	01: San Francisco : Test		Final Class Pull	40% / \$40.00
	Cellular Phone		01: San Francisco : sf			45% / \$45.00
<input type="checkbox"/>	83373	08/22/2024		Split demo 5		\$100.00
<input type="checkbox"/>	83378	08/22/2024		New Spit demo 6w		\$1,000.00

- With this improvement, the *Category* column in the **Expenses** grid will now show multiple values if an expense item was split between different categories. Previously, when a user splits an expense item, they were able to only see one Category when viewing their expenses on the **Expenses** grid. The improvement will allow users to be able to see all categories they have linked to that expense from the grid view.

Issues

Deployment Date: 10/08/24

- Fixed a bug where purchase orders couldn't be unlinked from expense items.
- Fixed a bug where expense details didn't populate correctly on the Expense Item Details page when opening an expense from the Transactions grid.

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Mobile App

Improvements

Deployment Date: 10/08/24

- This update is part of the initiative to add split coding to expenses on the mobile app. With this change, the metadata/dynamic coding framework was added into the mobile app. If configured, metadata and dynamic coding fields are now available in the mobile app.
- This improvement is part of the initiative to add split coding to expenses on the mobile app. With this change, the metadata/dynamic coding framework was added into the mobile app. This capability is already available on the web platform. The change will improve the user experience as it allows Corpay Complete Mobile App users to view metadata fields in their expense allocations. *Please note that these fields need to be configured first by the company for users to be able to view it.*
- With this improvement, Corpay Complete mobile app users can now change the Category when editing a card purchase. The "Allow staff users to edit GL coding on card purchases" company setting is enabled to be able to use this feature.

Allow staff users to edit GL coding on card purchases 

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Issues

Deployment Date: 10/08/24

- Fixed a bug on the mobile app where some users were unable to submit Mileage expense items.
- Fixed a display bug in the mobile app where the last record in a list view was getting hidden by the toolbar at the bottom of the screen on Android devices.
- Fixed a bug on the mobile app where Android users would get an infinite loading screen when attempting to upload a receipt to a declined transaction instead of an error message.

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