Expense Track 20.6 Release Notes

Release 20.6 for Expense Track is available on 09/21/2020 and includes the following changes:

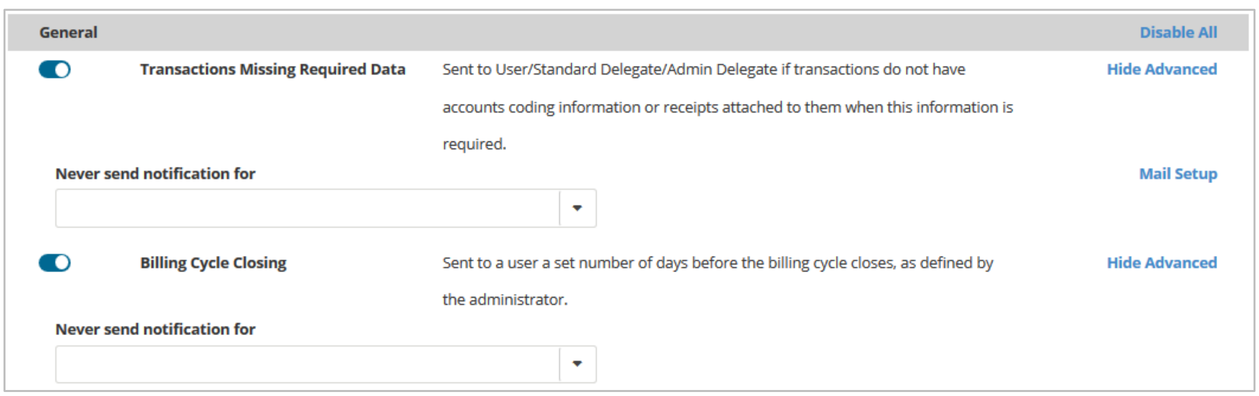
Note: For more information on the items listed, see the Expense Track Online Help.

- Add New Email Notification
- Add Email Notification Frequency Settings
- Mobile App
    - Add Credit Card Transaction in Approval Screens
    - Add Optical Character Recognition (OCR) for Receipt Capture
    - Add PDF Preview Thumbnail
    - Add PDF File Name
    - Change Password in the Mobile App

Add New Email Notification

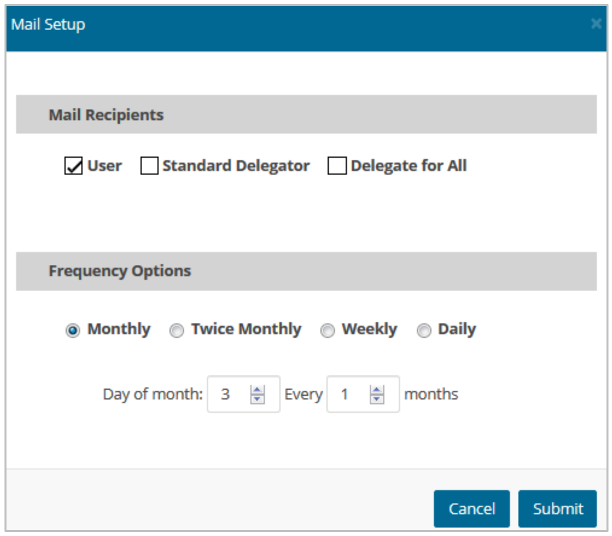
This item allows expense users and/or delegates to receive email notifications for Transactions Missing Required Data and for Billing Cycle Closing. This helps automate the process of reminding users they have action to take to submit their expense report in accordance with your company's expense policies.

Note: Users with **Permission 4208 – Can Manage Notification Settings for All Users,** have access to setup and edit notifications by going to the **Systems Wheel ( ) → User → Notifications.**



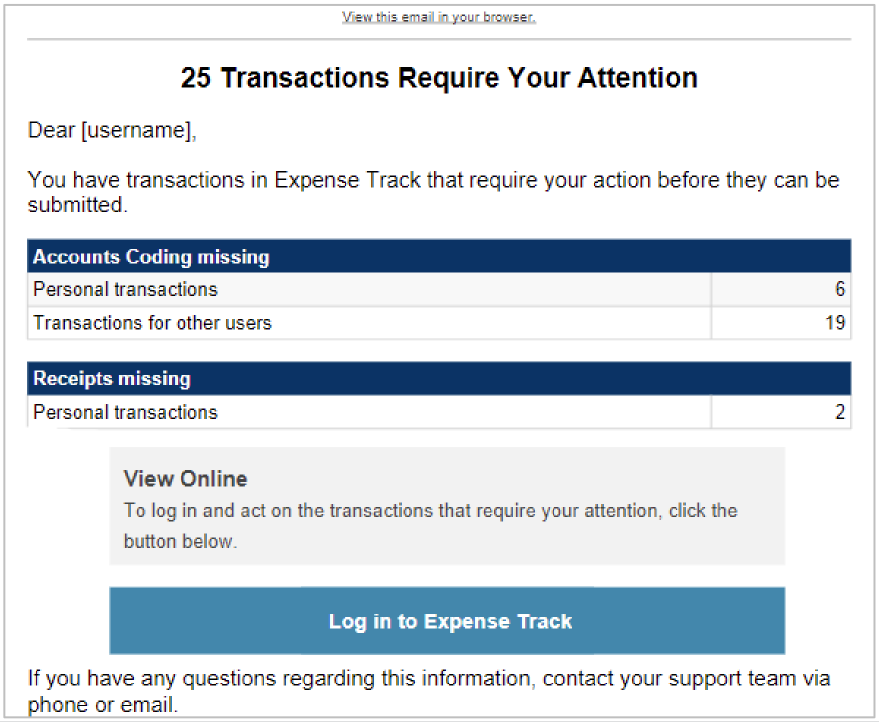
- **Transactions Missing Required Data:** If transactions in Draft status are missing required receipts or accounts coding, a notification is sent to users via email and/or internal notification, depending on the user's own settings.

- When configuring this notification, the administrator can choose which users the notifications will be sent to. Multiple recipient options can be selected:
  - User: Notification goes to the expense draft's "created for" user.
  - Standard Delegate: Notification goes to the "created for" user's delegates.
  - Delegate for All: Notification goes to the users who are the universal delegates for all users in the organization.



- The administrator can also set the frequency of the notification.
  - Monthly – day of the month and number of months between notifications (ex. On the 3rd day, every 2 months)
  - Twice Monthly – day of the month for the first and second notification
  - Weekly – days of the week to send the notification. Several days can be selected.
  - Daily – number of days between notifications (ex. Every 3 days)

Example Email:



View this email in your browser.

25 Transactions Require Your Attention

Dear [username],

You have transactions in Expense Track that require your action before they can be submitted.

Accounts Coding missing	
Personal transactions	6
Transactions for other users	19

Receipts missing	
Personal transactions	2

View Online

To log in and act on the transactions that require your attention, click the button below.

Log in to Expense Track

If you have any questions regarding this information, contact your support team via phone or email.

Note: For receipts to be required, **System Setting 2161 - Enable Attachment/Receipt Requirement for Expenses** must be enabled or the expense type must be set to require receipt. For coding to be required, **System Setting 2100 - Require Account Codes for Expenses** must be enabled or the accounts coding type must have required coding values. If both of the above settings are disabled, users will not receive the Transaction Missing Required Data notification.

- **Billing Cycle Closing:** Users can be notified a set number of days before and/or after the billing cycle ends, so that they can prepare and submit their transactions in time to be processed.

Your Comdata Administrators adjust the timing of these notifications using two new System Settings:

- **2351** - Days before end of billing cycle to send the reminder
- **2352** - Days after end of billing cycle to send the reminder

Note: By default, both settings are set to 0 days. Also, the billing cycle is defined by **System Setting 2310 - Credit card expense report cycle frequency.**

Add Email Notification Frequency Settings

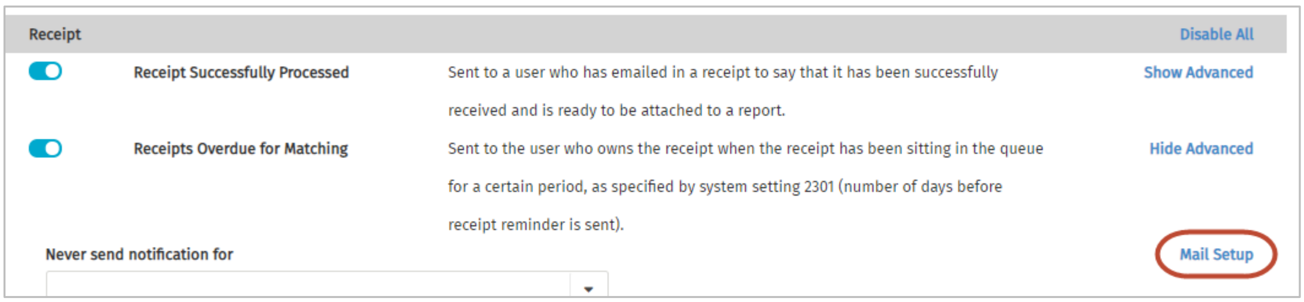
This item allows administrators to control when and how often notifications are sent to users regarding transactions missing required data, receipts overdue for matching, and receipts to be purged. For some notifications, administrators can configure how often they are sent to users.

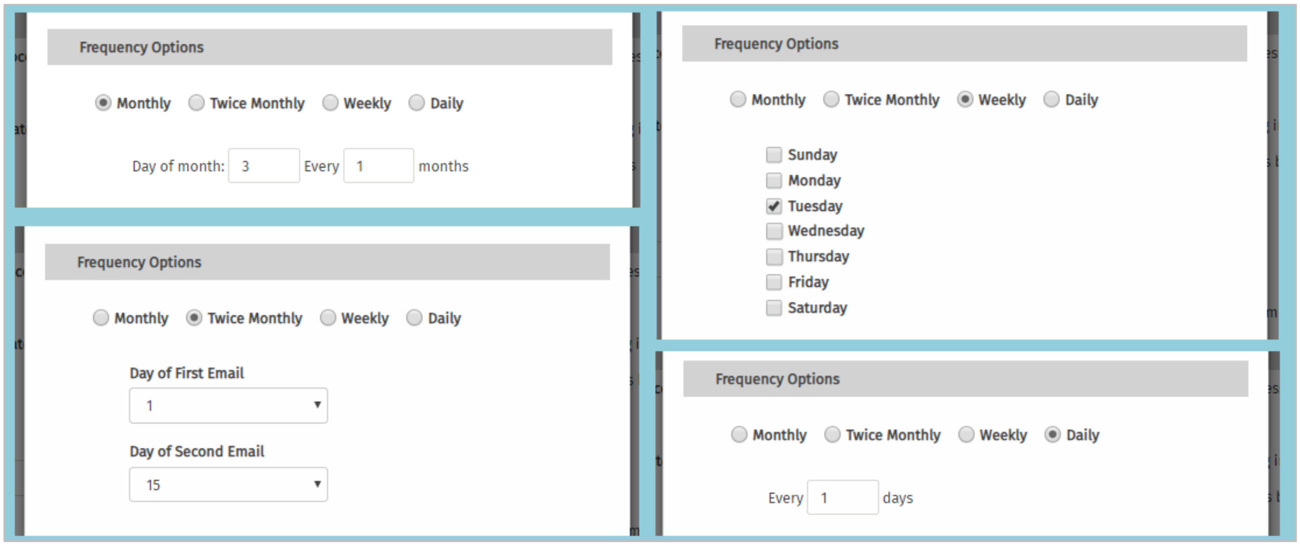
Controlling Frequency for Receipts Overdue for Matching: Receipts that have not been matched to expense reports are deleted from the system after a set number of days, as determined in **System Setting 2205 - Maximum Number of Days to Keep Expense Receipts Not Attached to Expense Reports**. Users are notified before their receipts are deleted, and administrators can now determine when users receive those notifications using two new System Settings:

- **System Setting 2355:** Notify users number of days before receipt is purged. With this setting, your Comdata Administrator can define how many days before a receipt is deleted that a user is notified about the receipt. By default, users are notified 10 days before the receipt is deleted.
- **System Setting 2356:** Number of days when the recurrence email is sent before the receipt is purged. With this setting, you Comdata Administrator can define how many days after the first notification the user is reminded about the unmatched receipt. By default, the user is reminded 1 day after the first notification.

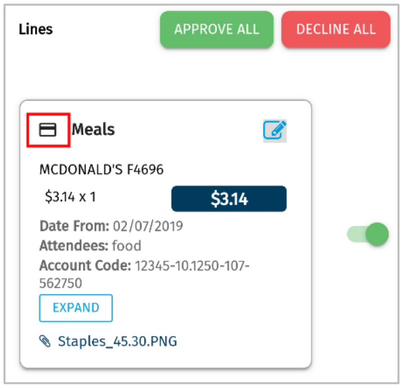
Controlling Frequency for Transactions Missing Required Data: When configuring these notifications on the Manage Notifications page, a new **Mail Setup** option is available. When clicked, the user can select from four frequency options:

- Monthly – day of the month and number of months between notifications (ex. On the 3rd day, every 2 months)
- Twice Monthly – day of the month for the first and second notification
- Weekly – days of the week to send the notification. Several days can be selected.
- Daily – number of days between notifications (ex. Every 3 days)





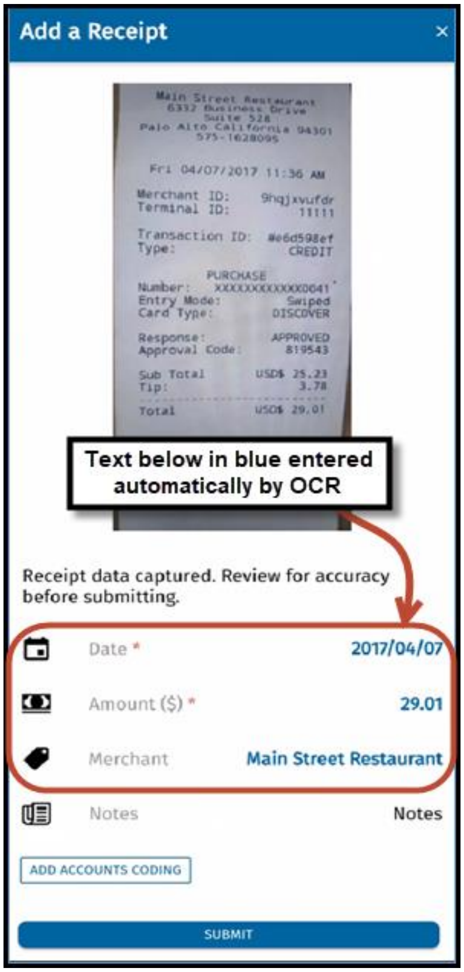
Add Credit Card Transaction in Approval Screens in Mobile App



This item allows mobile approvers to differentiate between credit card and reimbursable transactions. All Comdata Credit Card transactions will have a Credit Card symbol to the left of the Expense Item. This was previously visible while the transaction was in Draft status, but not when it was In Approval Status.

Add Optical Character Recognition (OCR) for Receipt Capture in Mobile App

This item allows mobile users capture the Merchant, Receipt Name and Receipt Amount through **Optical Character Recognition (OCR)**, instead of manually entering in this data.

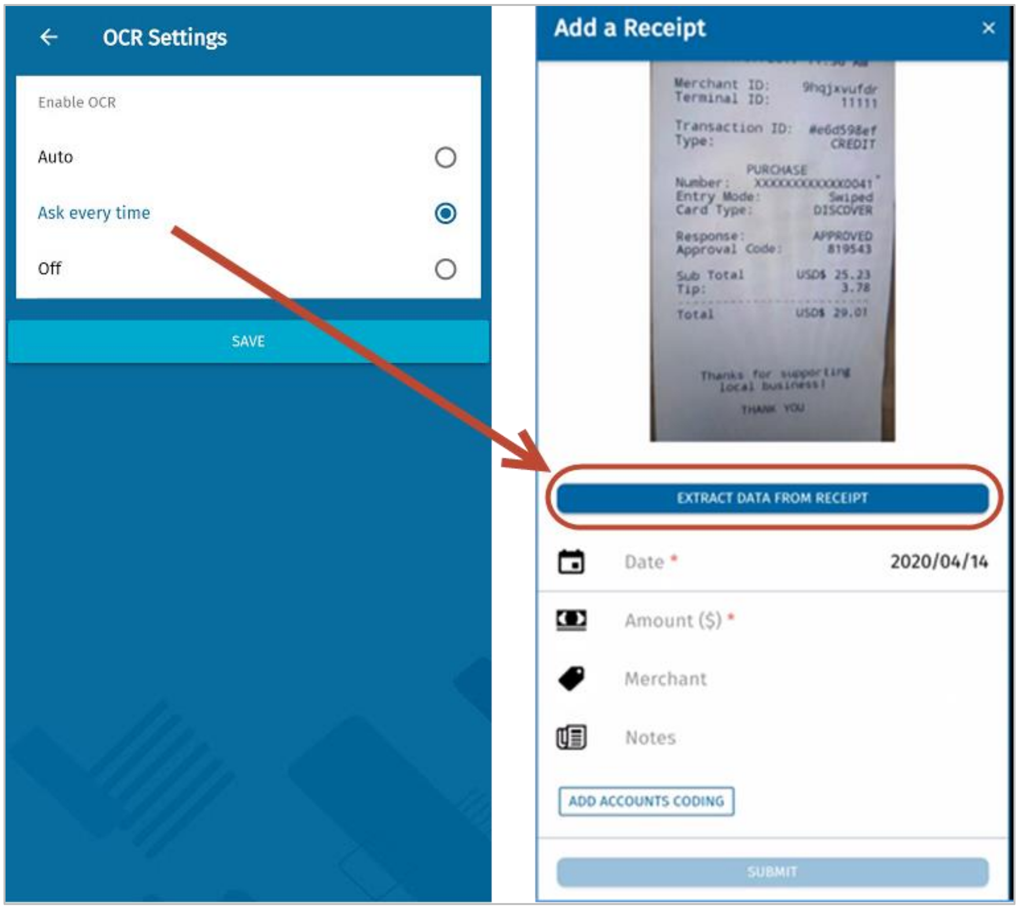


When OCR is enabled and a user uploads a receipt image, the app uses OCR to identify the merchant name, total amount, and receipt date. If OCR succeeds, the information is added to the receipt data fields in blue text. Users are encouraged to review this information for accuracy before submitting the receipt.

If the app is unable to recognize receipt data, the date field defaults to the current date, and the Amount and Merchant fields are left blank. In the app's Settings, the user can choose whether or not to use OCR to recognize receipt data. Users have three options:

- **Auto:** when a receipt is added, the app immediately scans it and fills in the data that it recognizes. Recommended for users with access to strong mobile data networks.
- **Ask every time:** when adding a receipt, the user can tap Extract data from receipt. Then the app scans it and fills in the data that it recognizes. Recommended for users with less reliable data service, as the OCR results depend on strong mobile data transfer.
- **Off:** the app never runs OCR and the user must fill in all receipt data manually.

Note: System Setting 2330 – Enable OCR for Mobile Receipt Capture must be set to Yes, the mobile app can use OCR (optical character recognition) to recognize data from receipt images and add it automatically to the receipt data fields. Please contact your Comdata Administrator if you would like to turn this feature on.



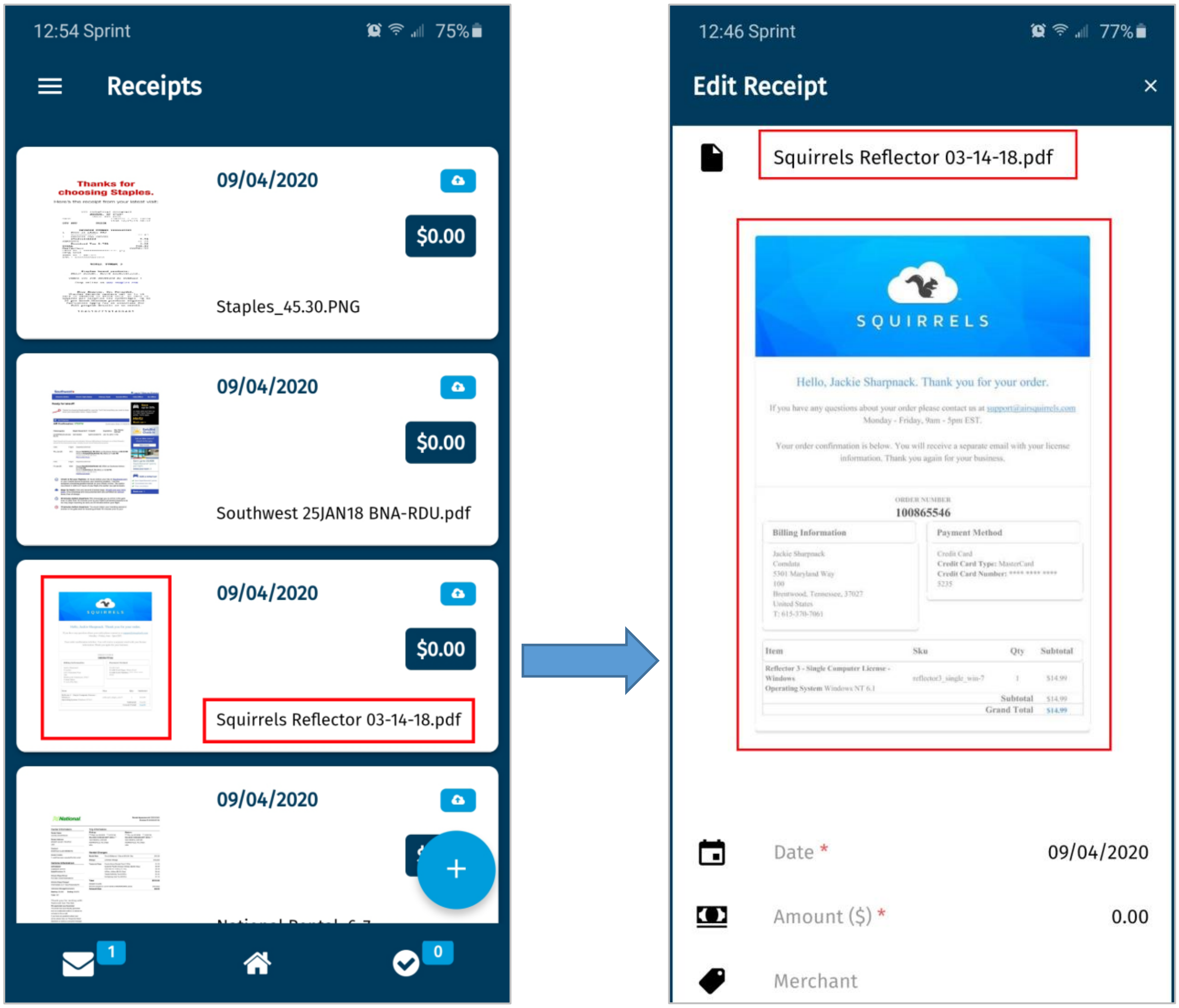
Note: This functionality uses mobile data to run OCR and data charges may apply. OCR is powered by the **Google Vision API.**

Add PDF File Name & Preview Thumbnail and in Mobile App

This item allows mobile users to more easily identify receipts that are in PDF format by showing them a visual thumbnail and showing the PDF file name.

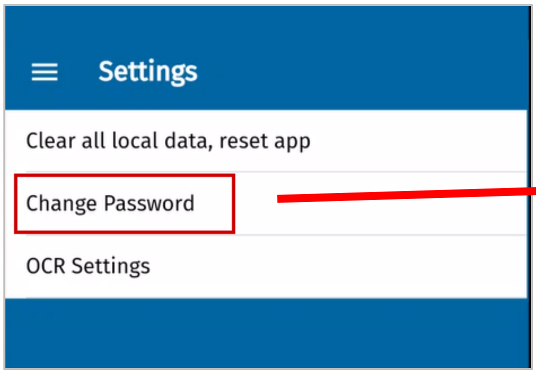
In the Receipts list and the Edit Receipt page, users can now see a thumbnail image of the first page of the PDF receipt. Users can also see the name of the uploaded file.

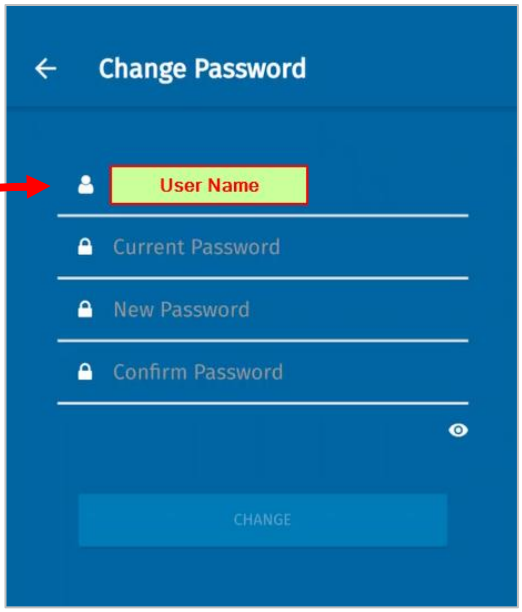
The thumbnail preview and file name are also available when attaching the receipt to a transaction in an expense draft.



Change Password in the Mobile App

This item allows mobile users to change their password anytime from the mobile app. The option Change Password is available in the app's Settings. Users must enter their username, current password, and then their new password twice to change it.





A user must also change their password after it expires. In that case, users are prompted to change their password immediately after logging in to the app. They do not have to enter their username and expired password again.

When entering a new password, the user must meet all of their organization's requirements for password complexity. After tapping **Change**, the user is logged out of the app and must log in with the new password.