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Release 23.6 for Expense Track will be available on Wednesday, 7/19/2023, and includes the following changes:

Expense Manager Updates

The Ability for Admins to Mass-upload (import) Delegates in the System

This change introduces a new feature that facilitates the import of delegates through import specifications. The enhancement allows Corpay Expense Track users with the role of Corpay/Tenant Admin to have the ability to mass upload delegates, which eliminates the need to update each user individually. With this change, an Administrator user who configures the system can effortlessly **Add** and **Delete** delegates. During the import configuration process, users have the flexibility to map the import file to the required fields for seamless management of delegates.

Example of an import file format:

A	B	C	D	E	F	G
UpdateType	DelegateLogin	DelegationType	DelegateFor	UserLogin	UserGroupName	LocationGroupName

Explanation of the Fields required in the Import specification:

Field Name	Description
Update Type	To specify the action intended with the record. Allowed Update types are: 1. **Add**: The user specified in the "DelegateLogin" field will be added as the delegate for the user mentioned in the "UserLogin" field. 2. **Delete**: The user specified in the "DelegateLogin" field will be removed as the delegate for the user mentioned in the "UserLogin" field.

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Field Name	Description
Delegate Login	Provide the login name of the delegate user. It is important to note that the delegate user must already exist in the system.
Delegation Type	**EXPENSE**- For Corpay Expense, the supported Delegate Type is limited to "Expense." Users have the option to set it as the default DelegateType in the import specification for the tenant.
Delegate For	Specifies for which segment the user will be delegate for. Valid values are: 1. **All:** The user mentioned in the "DelegateLogin" column will be assigned as the delegate for all the users in the system. Any values provided in the "UserLogin," "UserGroupName," and "LocationGroupName" columns will be disregarded. 2. **User:** The user mentioned in the "DelegateLogin" column will be assigned as delegate for the user mentioned in the "UserLogin" column. Any values provided in the "UserGroupName," and "LocationGroupName" columns will be disregarded. 3. **UserGroup:** The user mentioned in the "DelegateLogin" column will be assigned as delegate for all the users of the User Group mentioned in the "UserGroupName" column. Any values provided in the "UserLogin, and "LocationGroupName" columns will be disregarded. 4. **LocationGroup:** The user mentioned in the "DelegateLogin" column will be assigned as delegate for all the users of the Location Group mentioned in the "LocationGroupName" column. Any values provided in the "UserLogin", and "UserGroupName" columns will be disregarded.
UserLogin	Provide the login name of the user for whom the user mentioned in the "DelegateLogin" column will be assigned as a delegate. • Ensure that the user login already exists in the system. • Ensure that each import line contains only a single UserLogin name.
User Group Name	Provide the UserGroup name of the user(s) for whom the user mentioned in the "DelegateLogin" column will be assigned as a delegate. • Ensure that the UserGroup already exists in the system. • Ensure that each line contains only a single User Group name.
Location Group Name	Provide the LocationGroup name of the user(s) for whom the user mentioned in the "DelegateLogin" column will be assigned as a delegate. • Ensure that the LocationGroup already exists in the system. • Ensure that each line contains only a single Location Group name.

Example Import file:

1	UpdateType	DelegateLogin	DelegationType	DelegateFor	UserLogin	UserGroupName	LocationGroupName
2	Delete	JaneDoh	Expense	All			
3	Add	JohnSmith	Expense	Users	JaneDoh		
4	Add	JohnSmith	Expense	Users	MaryMoore		
5	Add	JohnSmith	Expense	Users	MichaelMaddison		
6	Add	James Johnson	Expense	User Groups		**Field	
7	Add	James Johnson	Expense	User Groups		**Sales	
8	Add	Lukas Jameson	Expense	User Groups		**Sales	
9	Add	Lukas Jameson	Expense	User Groups		**Marketing	
10	Add	Mary Moore	Expense	Location Groups			Location A
11	Add	Jerry Moore	Expense	Location Groups			Location A
12	Add	Jerry Moore	Expense	Location Groups			Location B

After successfully importing the above sample file, the system will have the following delegate structure:

User	Delegate For	Explanation
Jane Doh	<None>	Line 2 specifies to Delete "All" the users as delegates.
John Smith	JaneDoh MaryMoore MichaelMaddison	"Add" mentioned on Line 3,4,5
James Johnson	All the users of the group: **Field **Sales	Line 6,7
Lukas Jameson	All the users of the group: **Field ** Marketing	Line 8,9
Mary Moore	All the users of the: Location A	Line 10
Jerry Moore	All the users of the: Location A Location B	Line 11, 12

The Ability to Mark an admin User as a Delegate for All Employees They Manage

Corpay Expense Track users with the role of Tenant Admin and who create or edit user information can now be a delegate for all the users they are managing, which allows them to view all transactions. With this change once the **SS 2401: Set Manager as a delegate for the user** is enabled for the tenant, any users created or modified subsequently will have their manager automatically set as a delegate. However, users created or modified before the feature was enabled will not have the delegate set.

Note: The feature is not enabled by default. To enable the feature, reach out to the tenant admin.

*To set the manager user as a delegate for all users managed by the user, after enabling **SS2401**, reach out to the tenant admin.*

Enable Automatic Submission of Expense Drafts

Corpay Expense Track users who use the application to enter expense drafts can now submit their Expense Drafts automatically for approval if all the transactions have a green flag. This helps users by reducing the manual steps they perform when submitting expenses.

With this enhancement, the system will automatically submit and send for approval all incoming credit card transactions. Only the transactions that have all the necessary details are eligible for automatic submission. The expense report will be submitted when the waiting period after the end of the billing cycle has passed. The waiting period is specified in **SS2353** by the tenant admin.

Note: This feature is not activated by default. To enable the feature, reach out to the tenant admin.