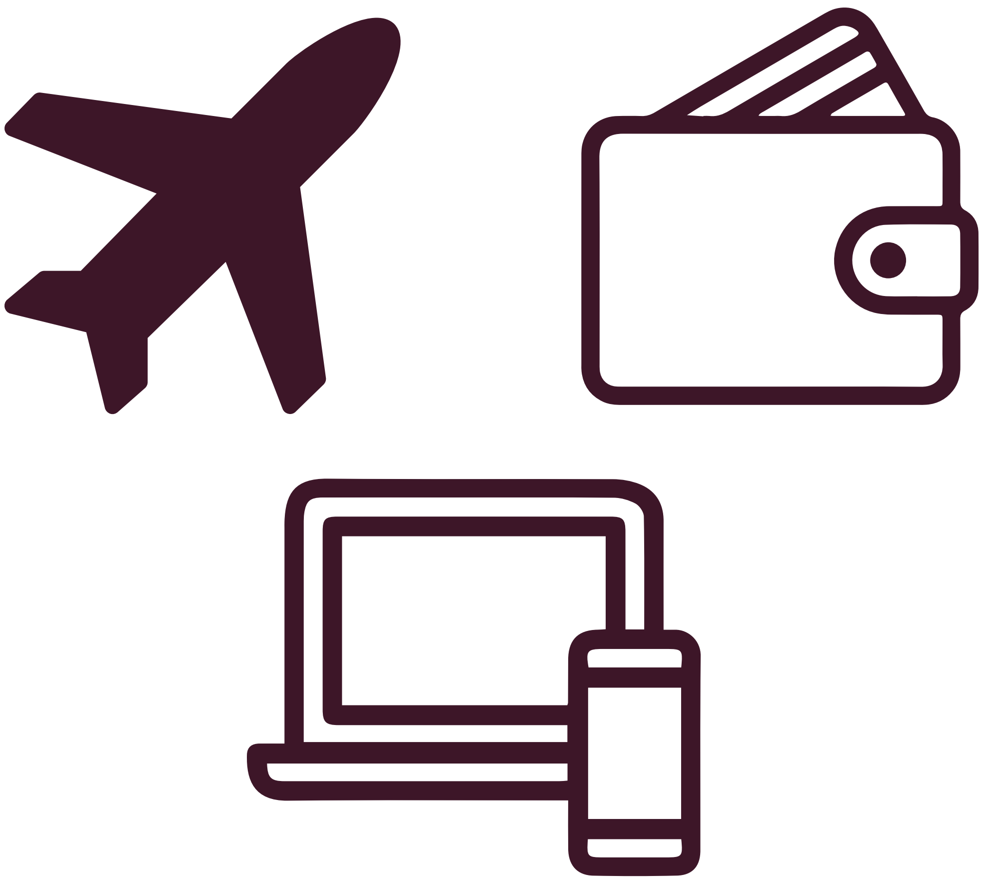
Expense Track Mobile App

User Guide



Version 1.3

October 2025

DISCLAIMER

The information furnished herein is proprietary and confidential and is intended only for Corpay customers. It should not be duplicated, published, or disclosed in whole or in part without the prior written permission of Corpay.

Contents

Revision Table

Date	Version	Author	Notes
08/07/2013	v. 1.0	Hanna Alemu	Initial document created.
12/31/2024	v. 1.2	Hanna Alemu	Added changes from ExpenseTrack 2024 Releases
10/312025	v. 1.3	Hanna Alemu	Added changes from ExpenseTrack Release 25.9

The Expense Track Mobile App

The Expense Track mobile app is a streamlined tool that allows you to view expense reports, capture receipt images with expense coding, code transactions, track your trips, and manage approvals all on the go. In addition, you can continue to use the mobile app if your mobile device is offline (not connected to a data network).

The Expense Track mobile app has been updated and includes a new user interface, but access to many features you are familiar with still remain. Use this guide to learn about the new Expense Track mobile app whether you are a new or returning user.

***Note:** The Expense Track mobile app is available for only Premium Expense Track users. Contact your Administrator or Corpay Representative for access to the Expense Track Premium package.*

Access the Mobile App

Access the Mobile App as a New User

If this is your first time using the Expense Track mobile app, follow the steps below.

Download

To download the Expense Track mobile app:

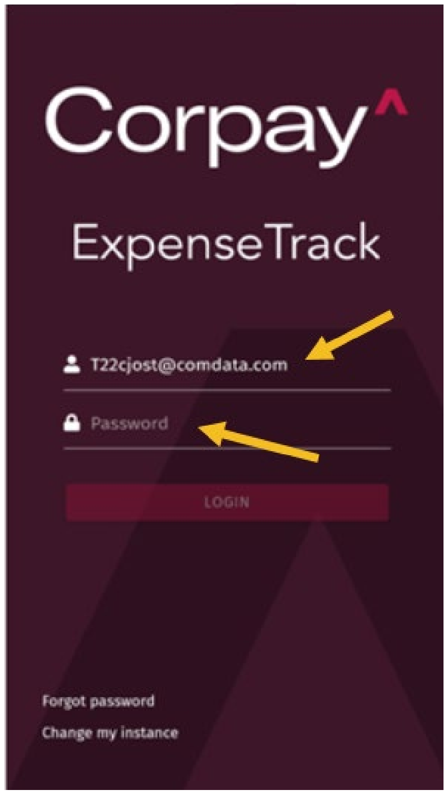
1. On your mobile device (phone, tablet, etc.), open your App Store (Apple App Store for Apple devices, Google Play Store for Android devices).
2. Once in the App Store, search for "Corpay Expense Track".
3. Locate and tap the Corpay Expense Track app icon.

4. Follow on screen instructions to download the app to your device.

Log In

When you first open the mobile app, the Log In screen opens. Enter your username and password (the same one you use for the Expense Track website). Tap **LOGIN**.

> ***Note:*** *The Expense Track mobile app stores your login credentials. This means that you will remain logged in each time you open the app. To manually log out, use the Settings screen.*



Access the Mobile App as a Returning User

If you previously used the Expense Track mobile app, follow these steps to access the new version.

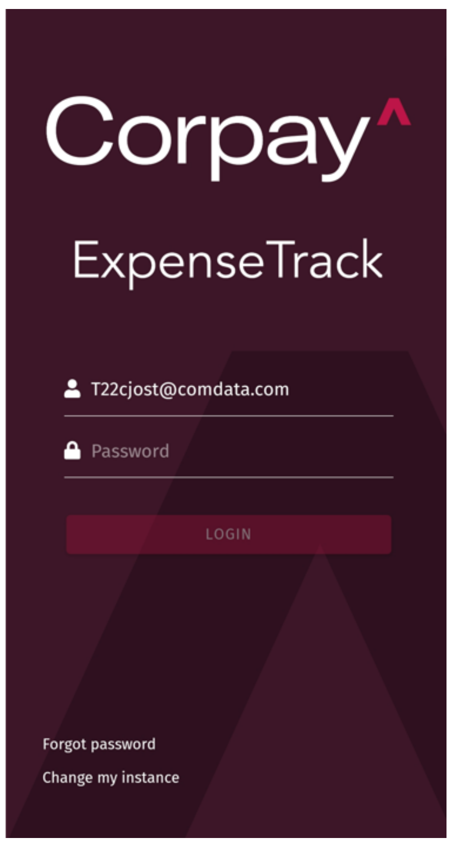
Update

If you have the auto-update apps feature enabled on your mobile device, there is no action required on your end. The new version will display the next time you open the mobile app.

If you do not have the auto-update apps feature enabled, follow these steps to manually update the Expense Track mobile app:

1. Open your phones app store (Apple App Store for Apple devices, Google Play Store for Android devices).
2. Search for " Corpay Expense Track".
3. Locate and tap the Corpay Expense Track app icon.

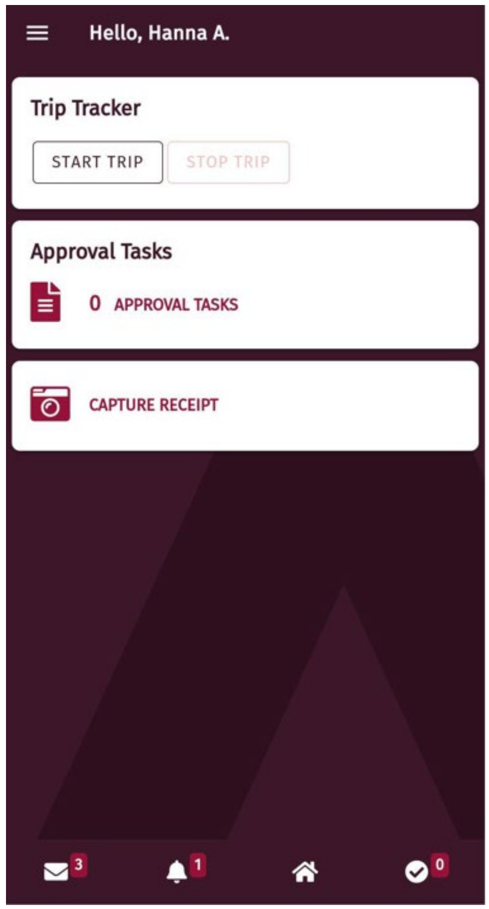
4. Locate and tap the **Update** button.
5. When the update is complete, open the Expense Track mobile app. You will be presented with the new version. Enter your existing username and password and tap **LOGIN**.



Navigate Expense Track App

Home Screen

1. Upon logging in, you are presented with the Home screen. Depending on your user role's access permissions, you may see different options. For example, if you have approval privileges, the total number of expenses requiring your approval will display.



2. The options at the bottom of the Home screen display throughout the app no matter what screen you're on.

   - Tap the Messages icon () to view your Expense Track messages. These are the same messages you receive in the Expense Track website.

     You can read messages and can delete messages by swiping left to display the Delete icon. Deleting a message in the mobile app will also delete it in the Expense Track website.

Note: *You cannot create or reply to messages within the mobile app. Also, tapping links within messages will open the mobile web browser version of the Expense Track website.*

- Tap the Bell icon ( ) to view any alerts and notifications.
- Tap the Home icon ( ) to return to the Home screen from any other screen in the app.
- If you have approval access, an Approval Tasks icon ( ) displays in the bottom right corner. Tap this icon to open the Approvals screen, where you can review, approve, or decline expense reports. You can also tap the Approval Tasks option at the top of the Home screen.

3. Tap the main menu icon ( ) in the top left corner to view all functions available to you in the mobile app. The next sections will cover each function.

My Card

If you have credit cards associated to your user profile, you can view and manage the cards here. Cards are listed with the most recently created card first.
Transaction data is provided in real time and is refreshed every time you visit the My Cards page. If needed, you can also manually refresh the data by tapping the Refresh icon.

Request a Replacement Card

To replace a credit card that has been lost, damaged, or is otherwise no longer usable, you can request a replacement. This functionality must be configured by your administrator and the Corpay team before it can be used. Contact your administrator with any questions.

1. Below the card name, tap **Request Replacement**.
2. In the form, fill out the required form information and tap **Submit**.

The information and replacement request are submitted. If you have any questions or concerns about the request, contact your manager.

Request a Spend Limit Increase

If your spend limit is too low for your typical card usage, you can request an increase. This functionality must be configured by your administrator and the Corpay team before it can be used. Contact your administrator with any questions.

1. Below the Spend Limit information, tap **Request Increase**.

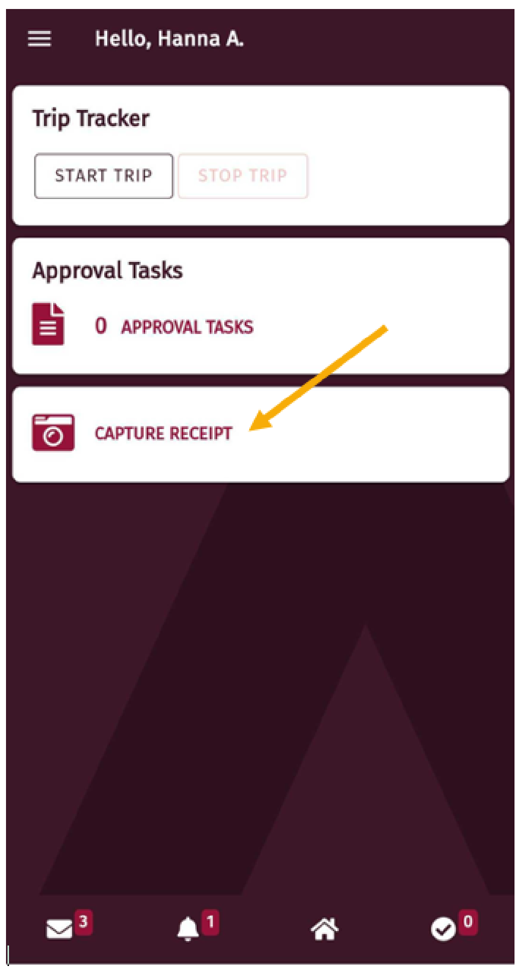
2. In the form, fill out the required form information and tap **Submit**.

The information and spending limit increase request are submitted. If you have any questions or concerns about the request, contact your administrator.

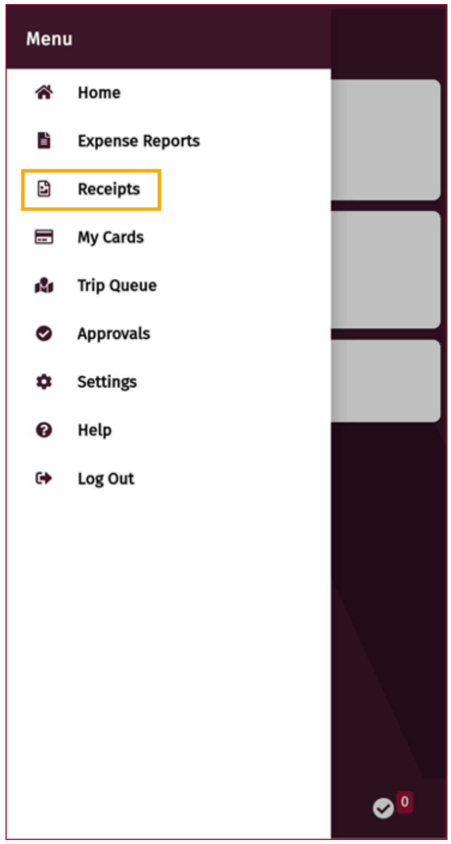
Capture Receipt Images

A key feature of the Expense Track mobile app allows you to capture receipt images and upload them to the Expense Track website via Cloud-based technology. If the date and amount on a receipt match the transaction in Expense Track, the receipt image will auto-attach to the transaction. Use the receipt capture feature to automatically attach receipt images to transactions on the go.

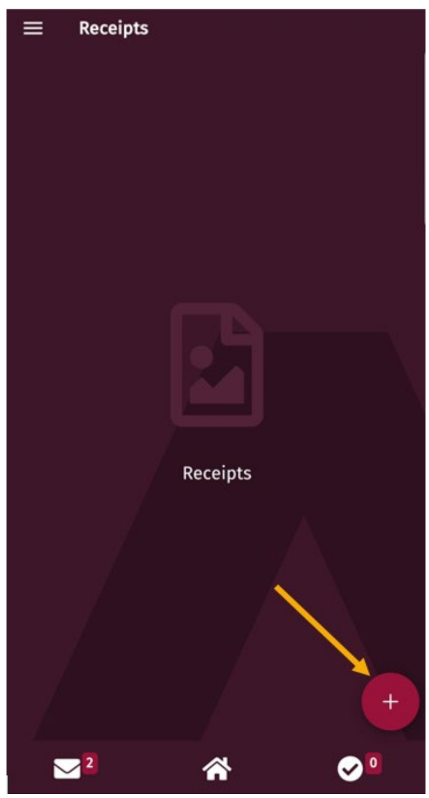
1. Use any of the two ways to capture an image of a receipt.
    a. On the Home screen, tap the **Capture Receipt** feature.



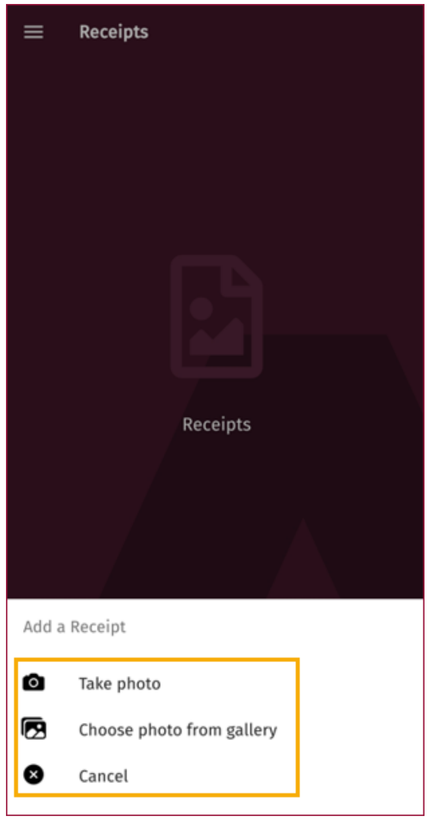
b. On the main menu, tap **Receipts**.



2. The Receipts screen opens. To add a receipt, tap the red plus icon.



3. Tap either:
    - **Take Photo** to open your mobile device's camera feature.
    - **Choose photo from gallery** to select an existing photo on your mobile device.

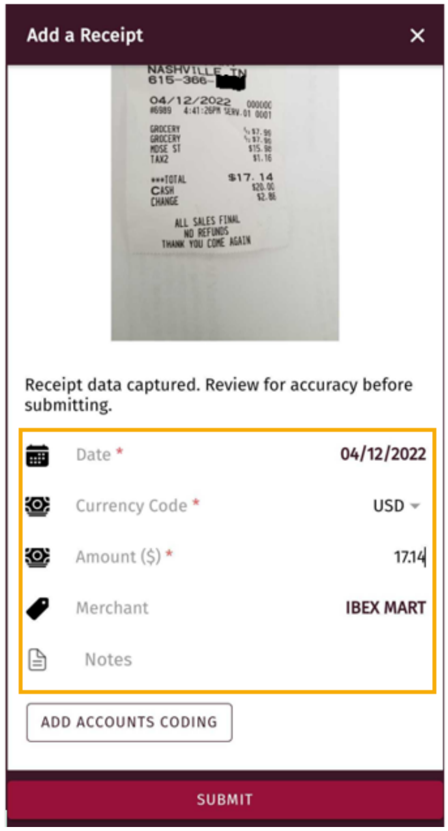


For this example, we tap **Take Photo**.

***Note:** If prompted, allow the app to access your mobile device's camera.*

4. Hover your camera over the receipt and take the picture. Ensure all of the information is visible and centered. Once you take the picture, tap **Use Photo** to save it or **Retake** to take another one.

5. Complete the displayed fields. Required fields are denoted by a red asterisk. *In order for the image to auto-attach to a transaction, the **Amount** and **Date** fields must match the date and amount on the receipt*.

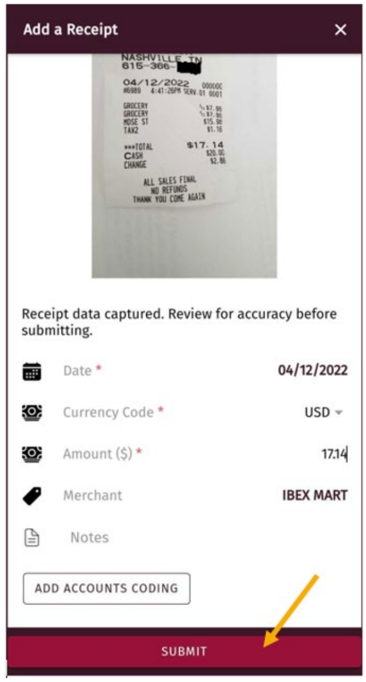


In addition, your settings may require you to enter a note. If so, a red asterisk displays on the **Notes** field. If this field is left blank when it is required, and the receipt image attaches to a transaction, the item will be in red flag status until you enter a note. The note will override any notes already on the transaction.

Note: *Tap Add Accounts Coding to add or split account codes on the receipt's transaction. If the receipt auto-attaches to a transaction, this accounts coding will override any accounts coding already on the transaction. See Credit Card Expense Reports for more information on accounts coding.*

6. Once complete, tap **Submit**.

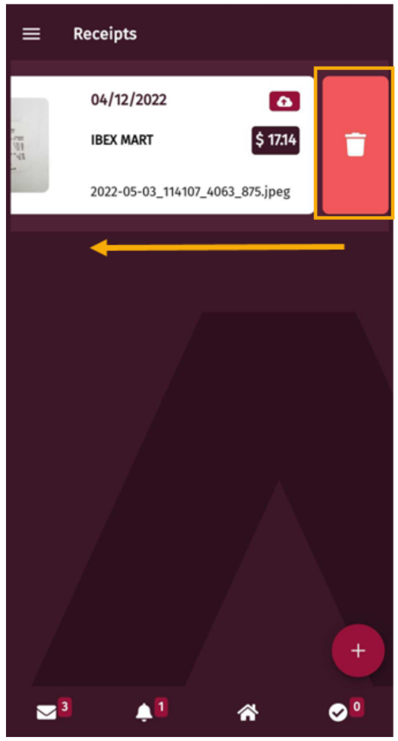
   ***Note**: You can come back and change these details any time after you've submitted the receipt image.*



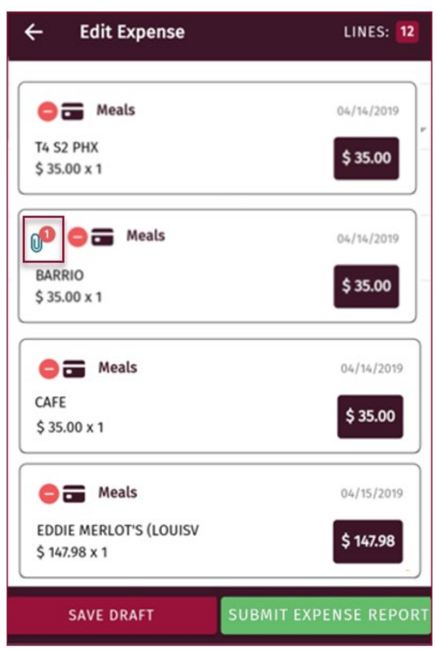
7. Your receipt is now uploaded. If you entered an incorrect date and/or dollar amount, and the receipt image does not auto-attach to a transaction, it will not be lost. However, it will remain in the Receipts queue in the Expense Track mobile app and website. From here, you can manually attach the receipt image to a transaction.

8. To delete a receipt image, swipe it to the left and tap the **Delete** icon.

Note: Once the receipt image is attached to a transaction, it will no longer display on the Receipts screen.



Note: Mobile users creating expenses in Corpay ExpenseTrack can quickly verify receipt attachments using the icon displayed on draft transaction cards. This icon shows the number of receipts linked to each draft, eliminating the need to open the detailed view.



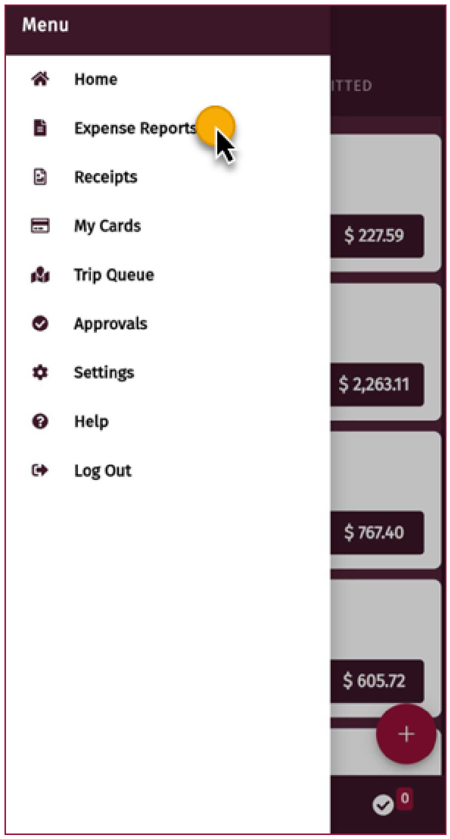
Credit Card Expense Reports

Just like the Expense Track website, you can submit your credit card expense reports within the mobile app. Your list of draft reports will include any reports you have. Use this feature to access your expense reports when you're on the go and don't have access to a computer.

Note: *Corpay Corporate Mastercard transactions will automatically generate an expense report and display in the mobile app, just as they do on the website.*

1. On the main menu, tap **Expense Reports**.

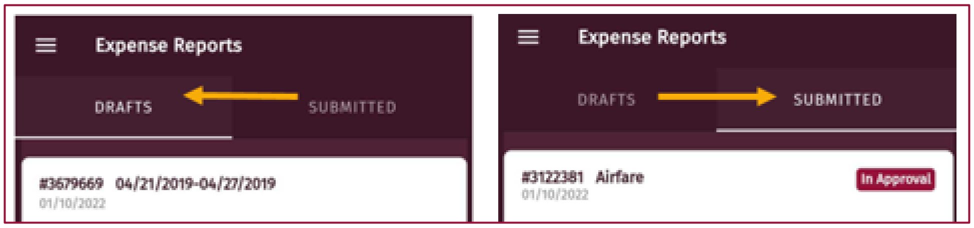
   Note: *The fields required to enter an expense item are dependent on the expense type selected and the settings configured by your program administrator.*



2. The Expense Reports screen is divided into two sections:

   - **Drafts:** Expense reports that have not yet been submitted for approval. Open these to edit them or apply new line items.

- **Submitted:** Expense reports submitted for approval and/or reconciliation. You cannot edit these reports, but you can review them.



The draft or submitted reports can be in one of four statuses:

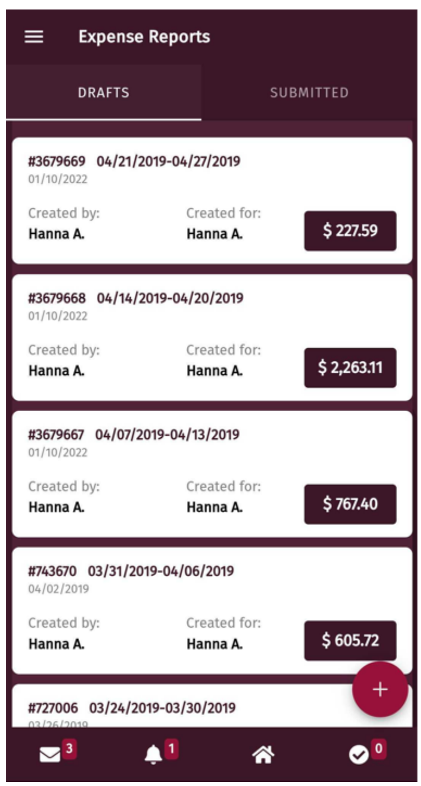
o **In Approval:** Expense report is waiting for approver to take an action.

o **Declined:** The approver declined the expense report.

o **In Accounting:** Expense report has been approved and is awaiting reconciliation.

o **Fully Released:** Expense report has been approved and fully reconciled.

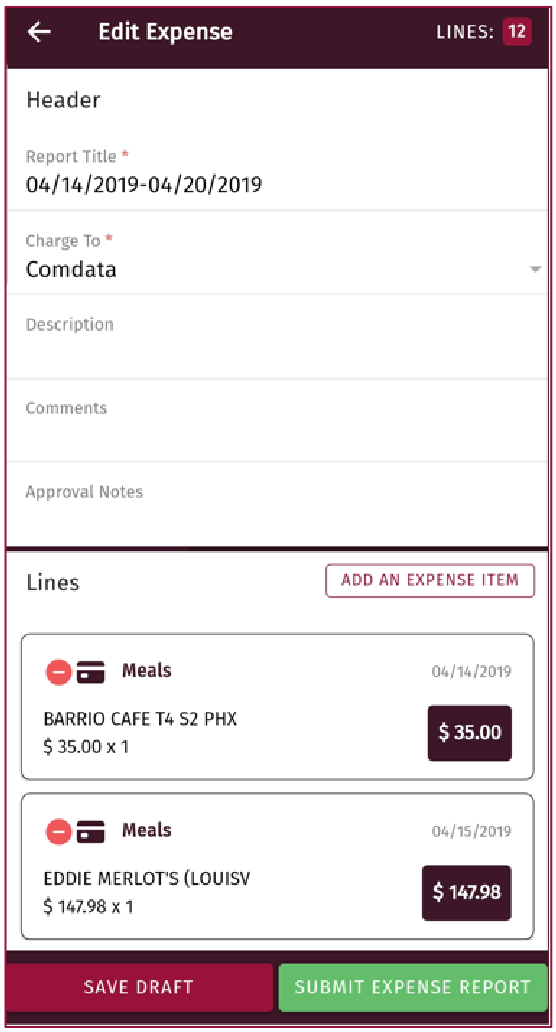
3. Click on the expense report you want to access transactions for.



Once inside the expense report, you will see the header information across the top that lets you know which time period you are accessing, and listed below will be the individual transactions that posted during that time frame. You will notice they have either a red or green icon, letting you know

Note: *Each expense item will be in one of the following statuses:*

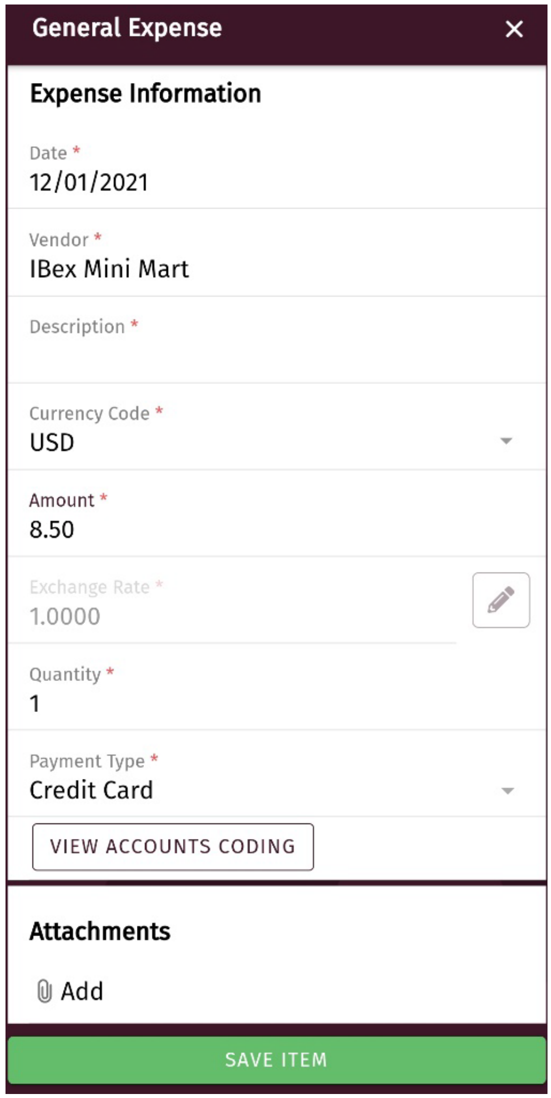
- *A red flag ( ) means the expense item is incomplete and requires additional information.*
- *A green flag ( ) means the expense item is complete and can be submitted with the expense report.*



4. Complete each field on the expense item. Required fields are denoted with a red asterisk. Remember, the fields displayed are dependent on the expense type and configurations made by your administrator.
   - Description (if required by a red asterisk)

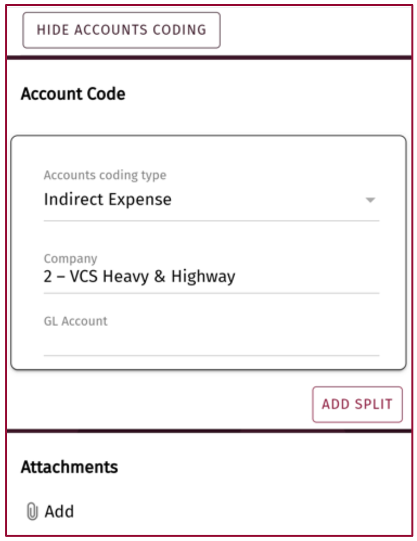
- Accounts Coding
- Attachment (unless not required - uncommon)

***Note:** If the receipt included the coding and notes, but had the wrong date or dollar amount, here is where you can manually attach it and it will bring all coding and notes over.*

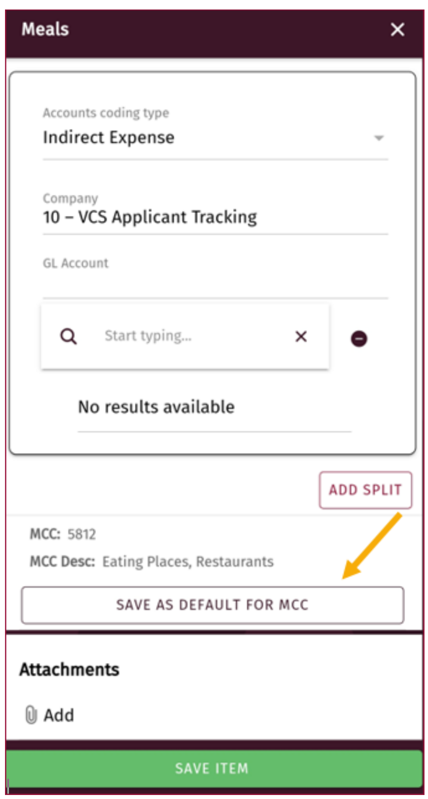


5. Scroll down and tap View Accounts Coding to enter account code details.
6. An Account Code section displays below. Select the appropriate account code structure. If default coding is applied, some fields may be selected for you, but can be changed.

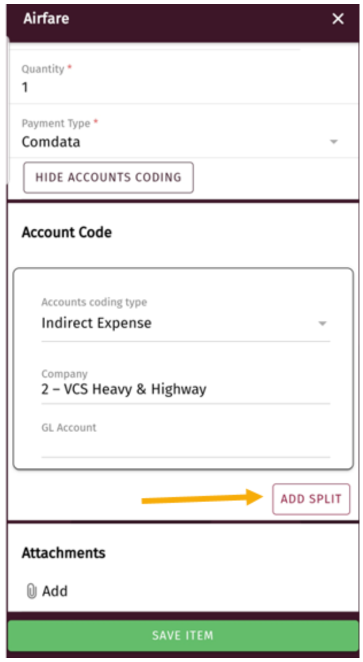
Note: *The configuration of the Account Code fields is dependent on your Expense Track setup. All accounts coding configurations, including accounts coding types and cascading, are reflected in the mobile app and can be applied to expense line items.*



*If enabled by your expense Administrator, you can save your accounts coding by MCC. Enter the accounts coding details, then click **Save as default for MCC**. In doing so, all other transactions with the same MCC will default to the saved account code values. Use this option to save time in coding transactions.*

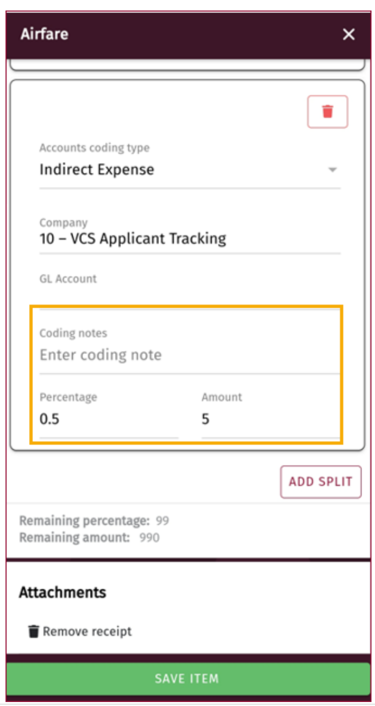


7. If desired, tap Add Split to split the account coding.



8. The screen refreshes to add another Account Code section below and includes a **Coding Notes**, **Percentage**, and **Amount** field in both sections. Enter the amount of the split either in the **Percentage** field (for example, .5 for 50%) or **Amount** field (for example, 45.50 for $45.50).

Note: *When entering your account code details, you can search by terms contained in the account code value. For example, if you type "job" all account code values that contain the term "job" will display for you to choose.*

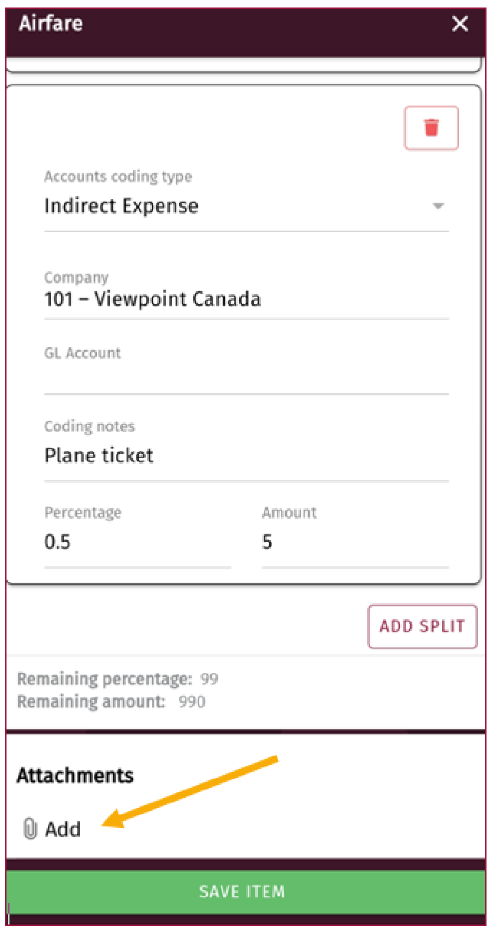


9. If another split is desired*, tap **Add Split** again. You can add as many splits as necessary, but note that the split is not complete until the sum of all splits equal the total amount or percentage (1.0 for 100%) of the expense item.

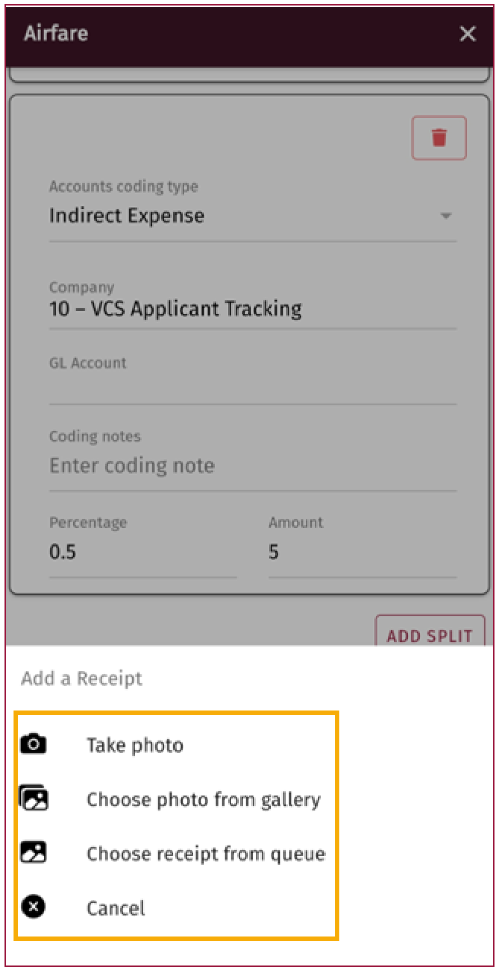
   Note: *Use the* ***Coding Notes*** *field to enter a note for each split in the expense item. These notes will be visible to the expense report Approver.*

   ****Splits can only be done based on coding –*** *not on notes. Meaning, if you need to split a meal between people, but it has the same coding, it will not allow you to do so. You may only split based on differing codes.*

10. Scroll down and tap the attachments icon (📎) to attach a receipt image to the expense item.

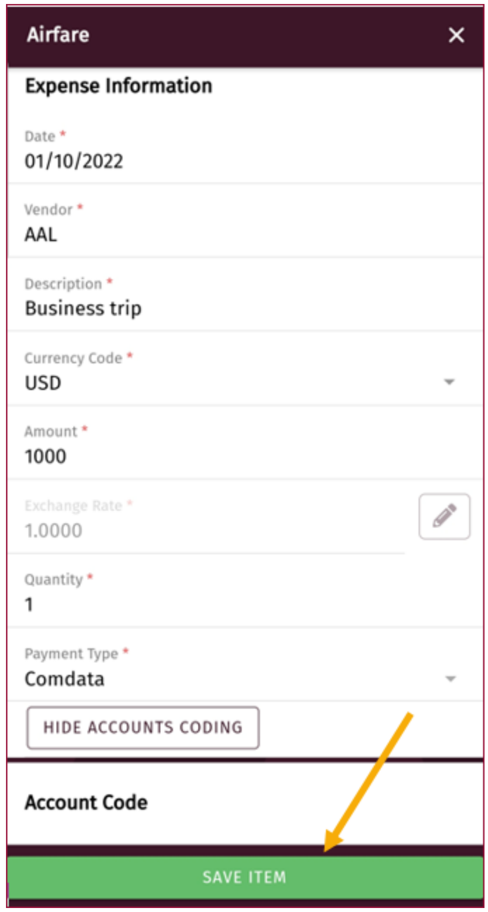


You can either take a picture, select an existing one on your mobile device, or select one from the Receipts queue if you uploaded an image that was not attached to a transaction. *See **Capture Receipt Images** for more information.*



11. Once you have entered all necessary details, tap Save Item. The expense item is validated and saved with all information you entered.

Note: *If you miss a required field, you will receive a warning message upon saving. Tap* ***Fix*** *to go back and complete the missed required fields or tap* ***Dismiss*** *to skip and save the expense item.*

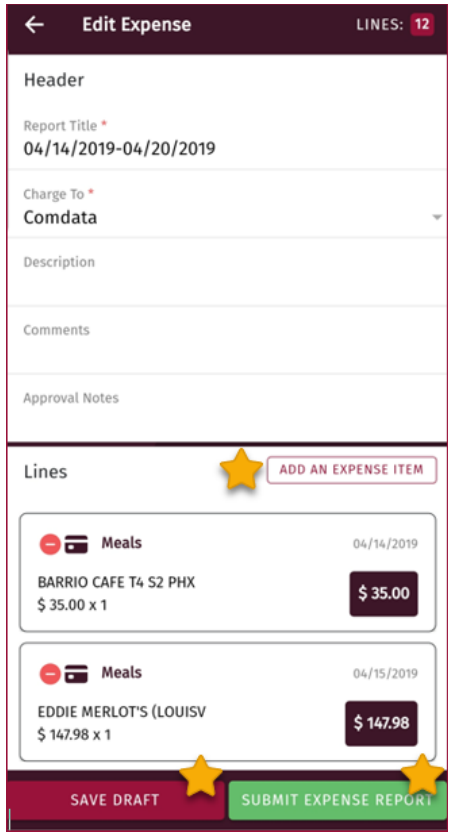


12. You are now returned to the Edit Expense screen and the expense item displays at the bottom of the screen. From here, you can either:

- Tap **Save Draft** to save the expense report which will display it at the top of the Expense Reports screen.
- Tap **Submit Expense Report** to submit the report for approval.

Note: *Each expense item will be in one of the following statuses:*

- *A red flag (⛔) means the expense item is incomplete and requires additional information.*
- *A green flag (✅) means the expense item is complete and can be submitted with the expense report.*



Note: *The system will automatically submit and send for approval all incoming credit card transactions that have all the necessary details. 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.*

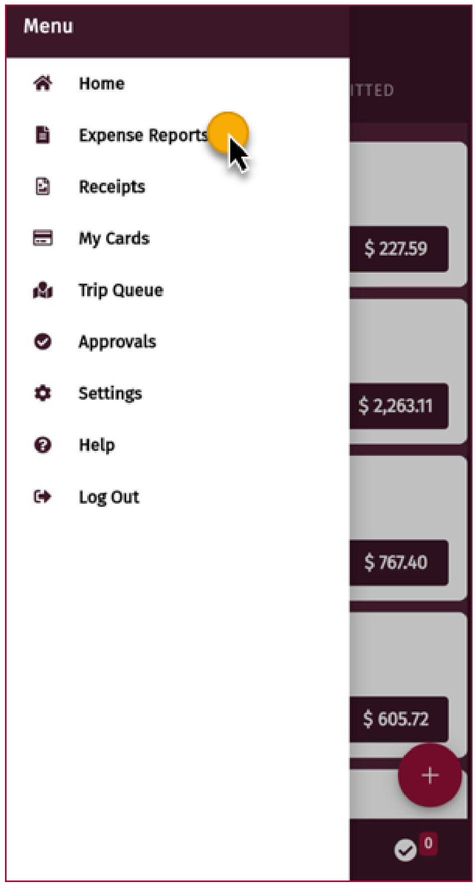
Create Reimbursable Expense Reports

Just like the Expense Track website, you can create and submit reimbursable, out-of-pocket expense reports within the mobile app. Your list of draft reports will include any reports you create within the mobile app and ones from the Expense Track website. Use this feature to create expense reports when you're on the go and don't have access to a computer.

Note: *If you have a Corpay Corporate Mastercard, your expense reports will automatically generate and display in the mobile app, just as they do on the website. This process is only for creating reimbursable (non-Corpay card) expense reports.*

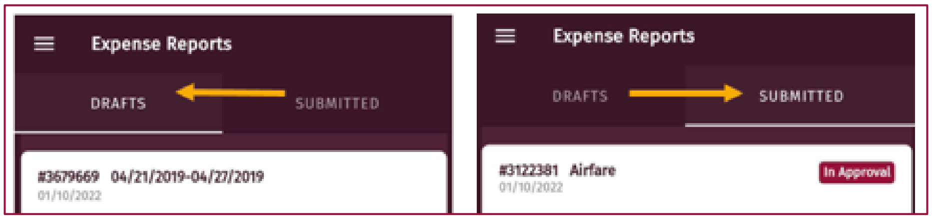
1. On the main menu, tap **Expense Reports**.

   Note: *The fields required to enter an expense item are dependent on the expense type selected and the settings configured by your program administrator.*

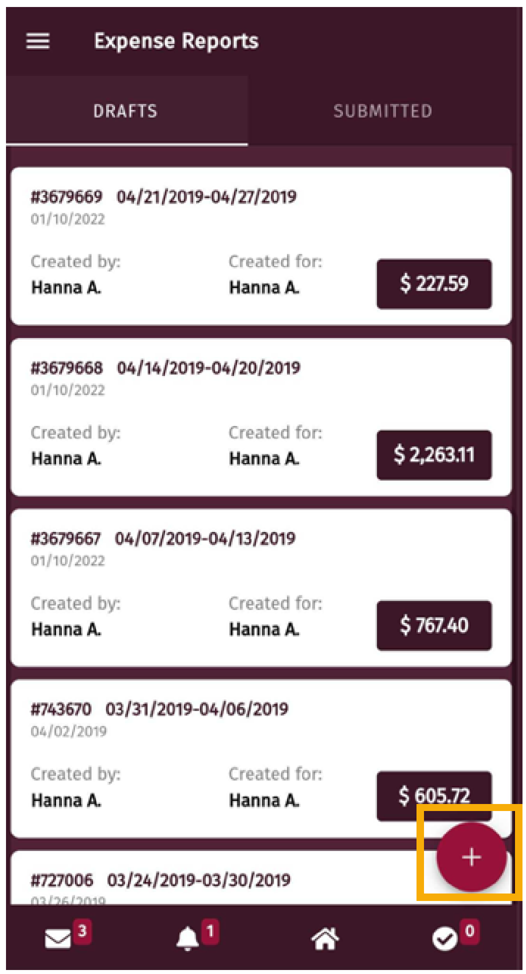


2. The Expense Reports screen is divided into two sections:
   - **Drafts:** Expense reports that have not yet been submitted for approval. Open these to edit them or apply new line items.

- **Submitted:** Expense reports submitted for approval and/or reconciliation. You cannot edit these reports, but you can review them. (see under Credit Card Expense Reports for more information on this topic)

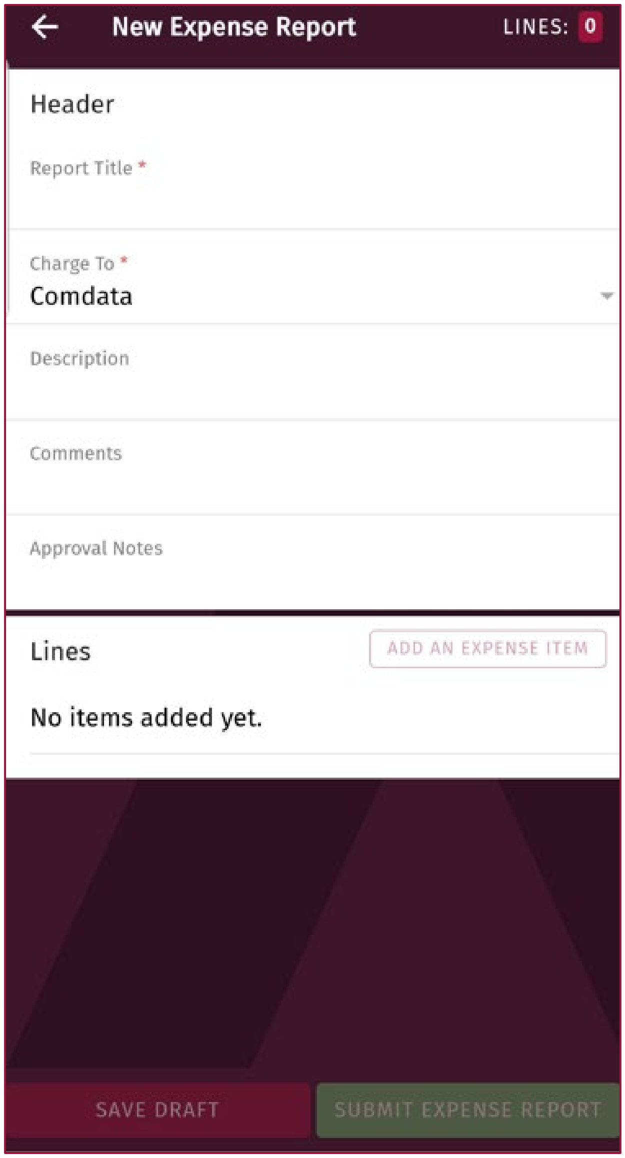


3. Tap the plus icon () to create a new reimbursable (non-Corpay card) expense report.



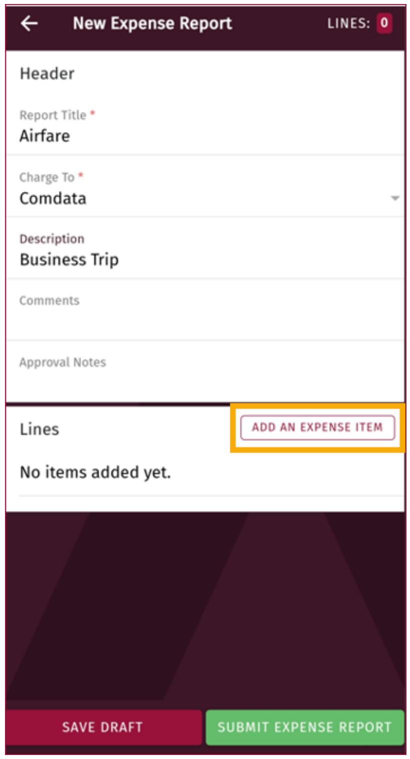
4. Enter all of the header details for the expense report. Required fields are denoted by a red asterisk.

   Note: *If you navigate away from this screen after entering information, your report will be saved as a draft.*

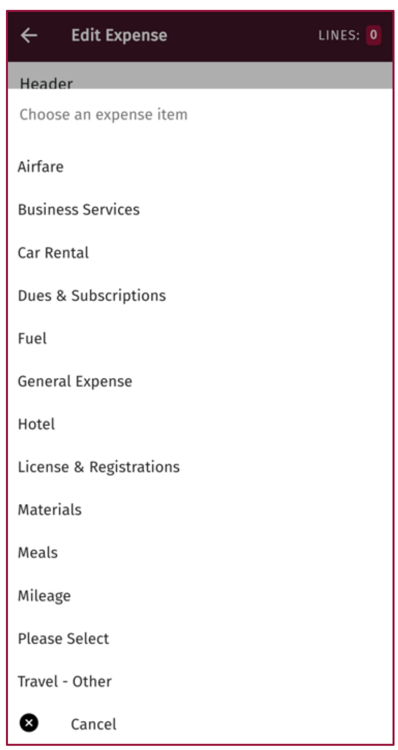


5. Scroll down to the Lines section and tap **Add An Expense Item**.

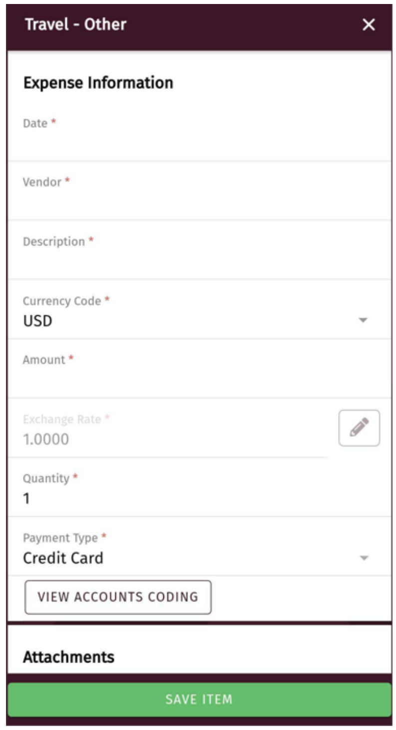
***Note:** You cannot tap this option until the required fields on the Header are complete.*



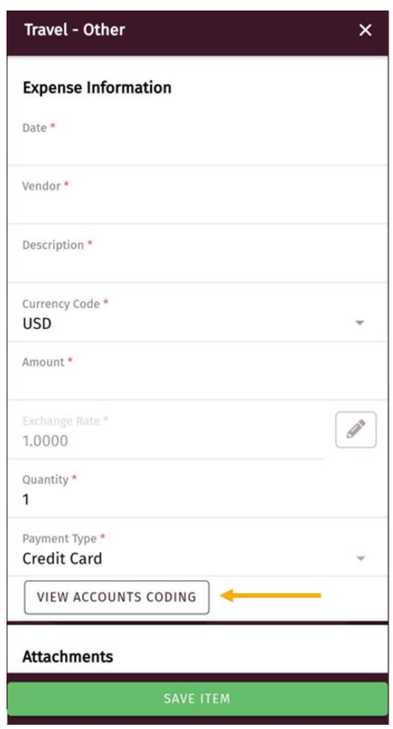
6. Select an expense item.



7. Complete each field on the expense item. Required fields are denoted with a red asterisk. Remember, the fields displayed are dependent on the expense type and configurations made by your administrator.



8. Scroll down and tap View Accounts Coding to enter account code details.



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9. An Account Code section displays below. Select the appropriate account code structure. If default coding is applied, some fields may be selected for you, but can be changed.

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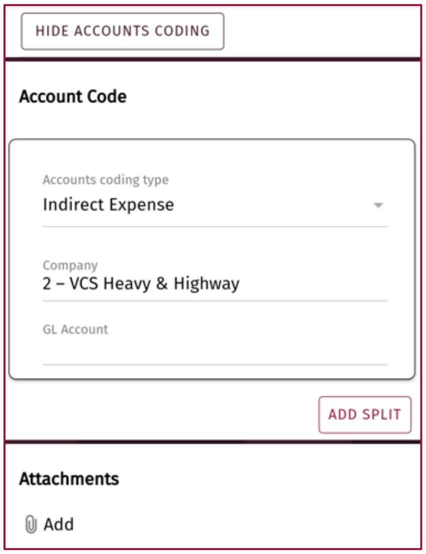
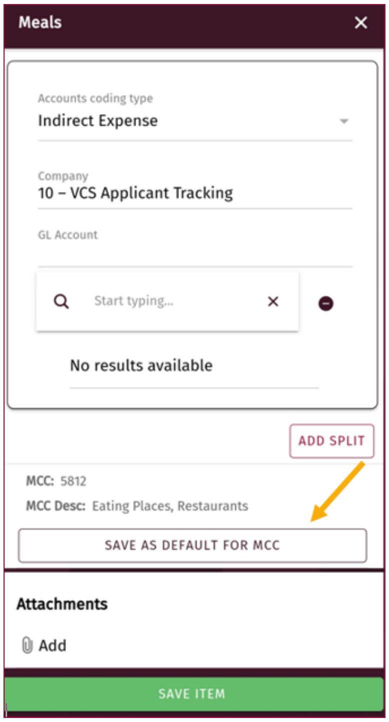
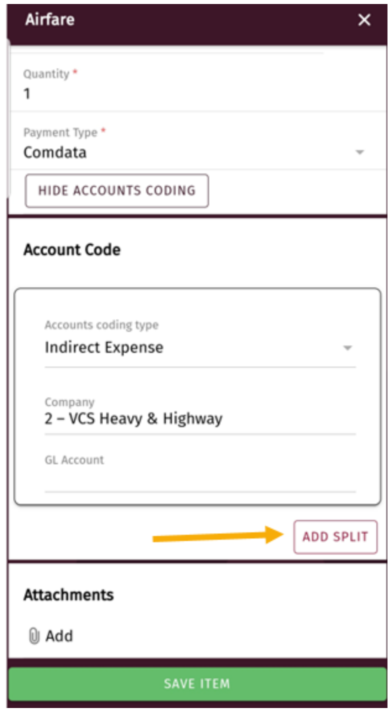


If enabled by your expense Administrator, you can save your accounts coding by MCC. Enter the accounts coding details, then click ***Save as default for MCC****. In doing so, all other transactions with the same MCC will default to the saved account code values. Use this option to save time in coding transactions.*



10. If desired, tap Add Split to split the account coding.



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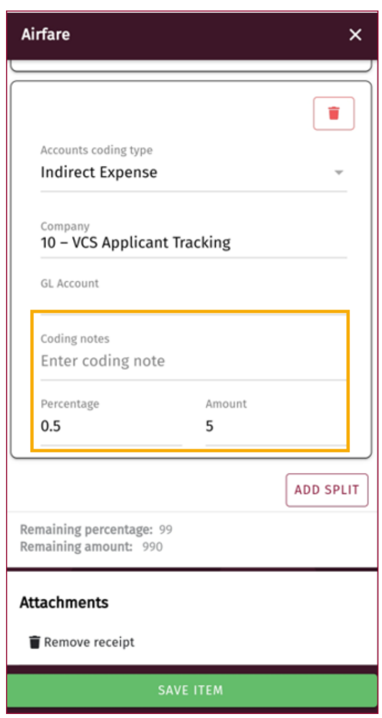

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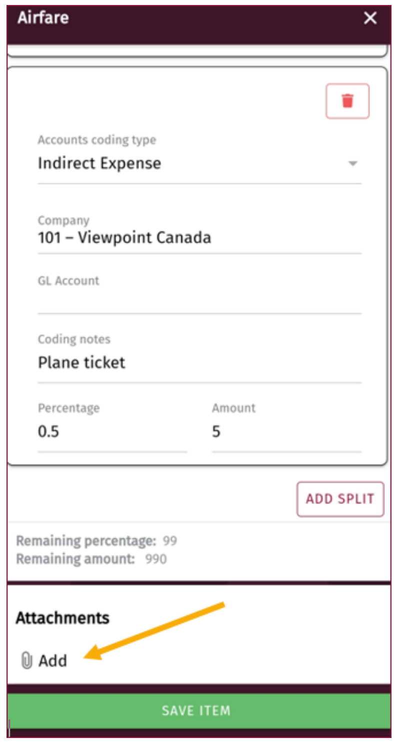
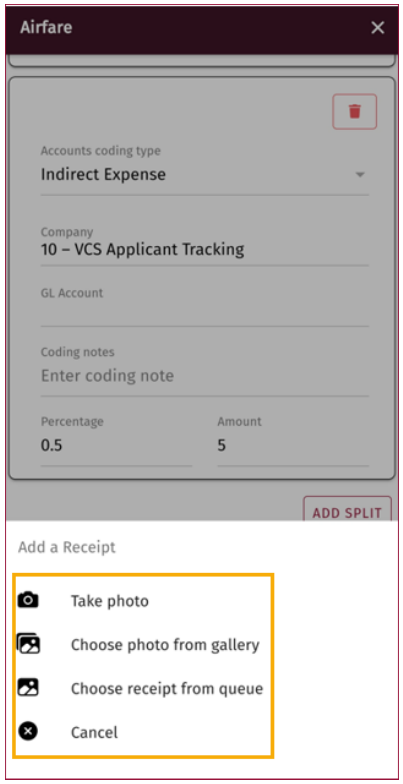
12. If another split is desired, tap **Add Split** again. You can add as many splits as necessary, but note that the split is not complete until the sum of all splits equal the total amount or percentage (1.0 for 100%) of the expense item.

__Note:__ Use the __Coding Notes__ field to enter a note for each split in the expense item. These notes will be visible to the expense report Approver.

13. Scroll down and tap the attachments icon ( ) to attach a receipt image to the expense item.

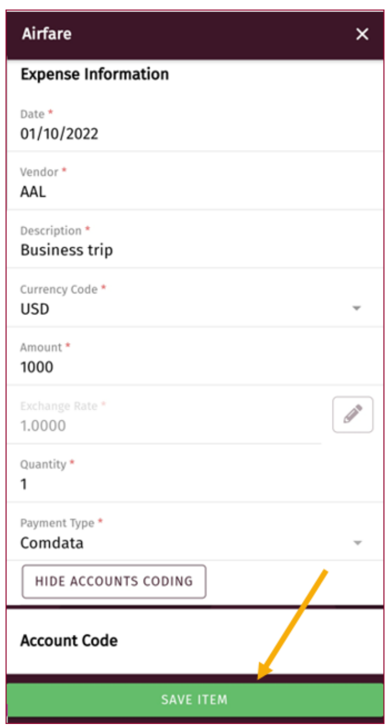


You can either take a picture, select an existing one on your mobile device, or select one from the Receipts queue if you uploaded an image that was not attached to a transaction. *See __Capture Receipt Images__ for more information.*



14. Once you have entered all necessary details, tap Save Item. The expense item is validated and saved with all information you entered.

__Note:__ If you miss a required field, you will receive a warning message upon saving. Tap __Fix__ to go back and complete the missed required fields or tap __Dismiss__ to skip and save the expense item.

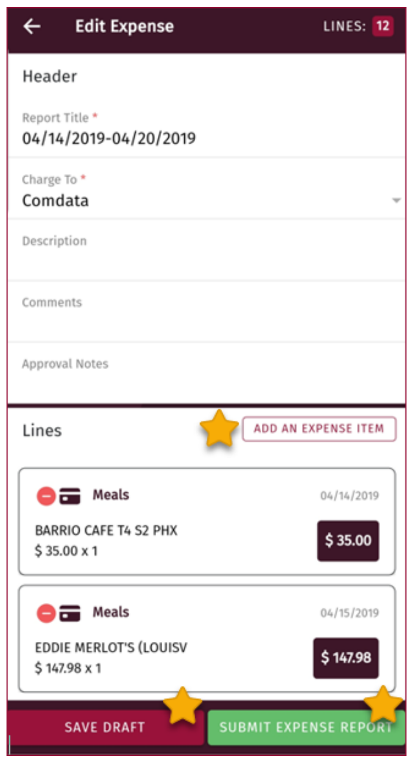


15. You are now returned to the Edit Expense screen and the expense item displays at the bottom of the screen. From here, you can either:

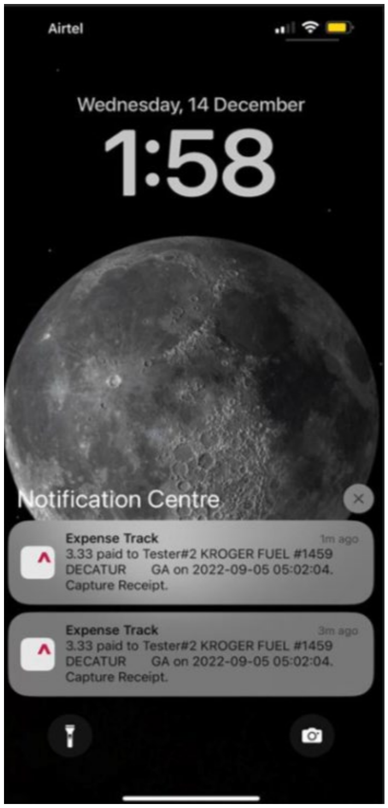
- Tap **Add an Expense Item** to add another line item.
- Tap **Save Draft** to save the expense report which will display it at the top of the Expense Reports screen.
- Tap **Submit Expense Report** to submit the report for approval.

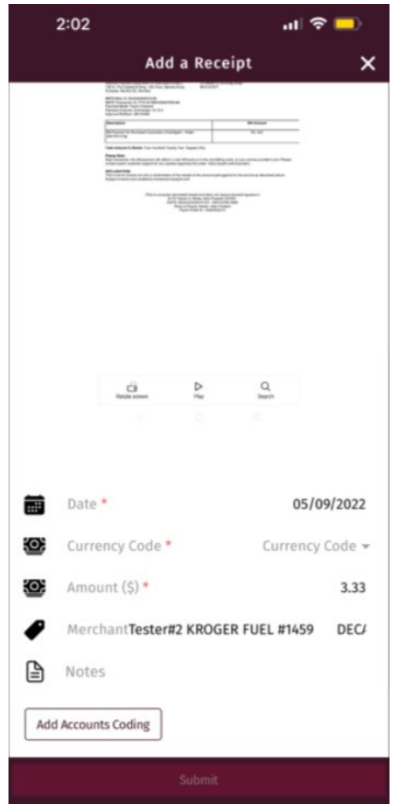
Note: *Each expense item will be in one of the following statuses:*

  - *A red flag ( ) means the expense item is incomplete and requires additional information.*
  - *A green flag ( ) means the expense item is complete and can be submitted with the expense report.*



***Note**: Corpay users making credit card purchases receive mobile notifications within minutes of the transaction. Tapping the notification lets users quickly capture and upload a receipt, with date, amount, and merchant details auto-filled. Notifications can also be accessed through internal messaging for easy receipt creation.*





Track Your Trip

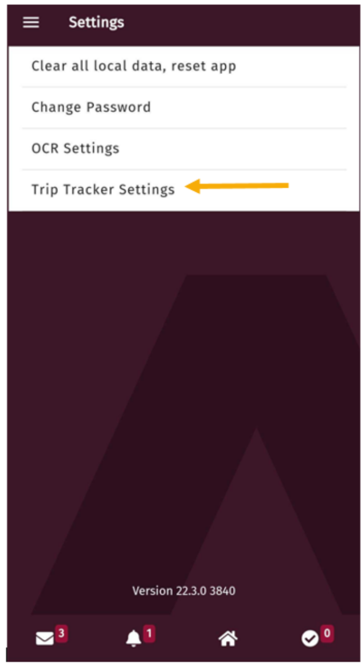
One of the key features of the Expense Track mobile app is the Trip Tracker, which gives users the ability to track their trip when travelling to various locations. If you frequently drive for work and create expense items for mileage, you can easily convert driving trips to expense items using Trip Tracker. When enabled, you will see the Trip Tracker on your app dashboard with the options **to START TRIP** and **STOP TRIP**.
After the trip is complete and you stop the trip, you can select the expense item for the trip and add it to a new or existing expense report.

Setup your Trip Tracker

Before you can use Trip Tracker, you need to make sure it is enabled for your organization and for your own app. To enable trip tracker:

1. In the mobile app, tap > **Settings** > **Trip Tracker Settings**.

***Note**: If you do not see this settings option, contact your system administrator and ask them to enable system setting for you.*



2. Set the toggle for **Enable Trip Tracker** to on and click Save.

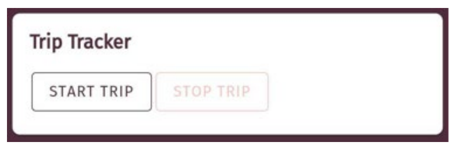
The trip tracker is enabled. You may need to allow location tracking in your mobile device's app settings in order for trip tracking to work.

Record a Trip with Trip Tracker

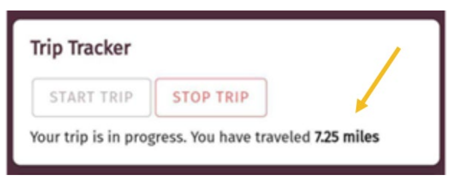
To easily create mileage expense items and add them to expense reports, you can record driving trips while you're driving.

To add a trip using the Trip Tracker:

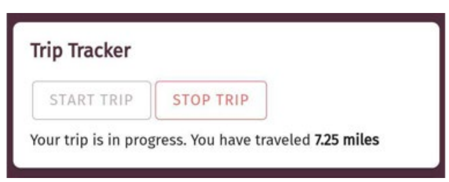
1. Make sure you have **Trip Tracker** enabled for your application and Location permissions allowed for the app.
2. When you are ready to start your trip, open the mobile app and tap **START TRIP** from the dashboard.



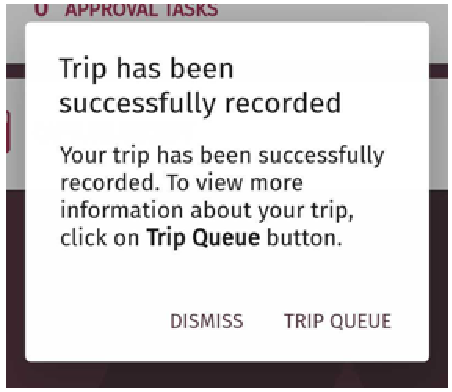
3. Drive to your destination. Allow the app to keep running on your phone. While your trip is in progress, you can check the Trip Tracker card to see how far you have traveled.



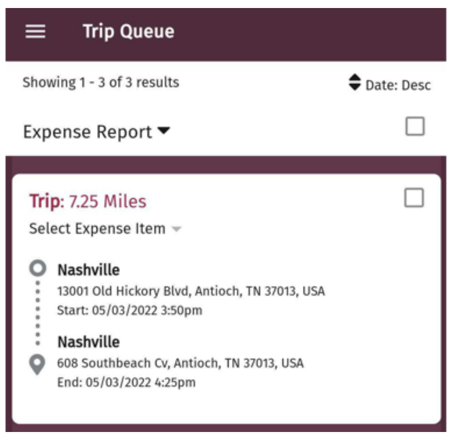
4. When you arrive at your destination, open the mobile app and tap **STOP TRIP**.



***Note**: You will receive a pop-up notification indicating the trip is recorded and added to your **Trip Queue**.*



5. You can open your trip details from the Trip Queue, which can be accessed from the pop-up notification or the main menu, to define the expense item for your trip and add it to an expense report.

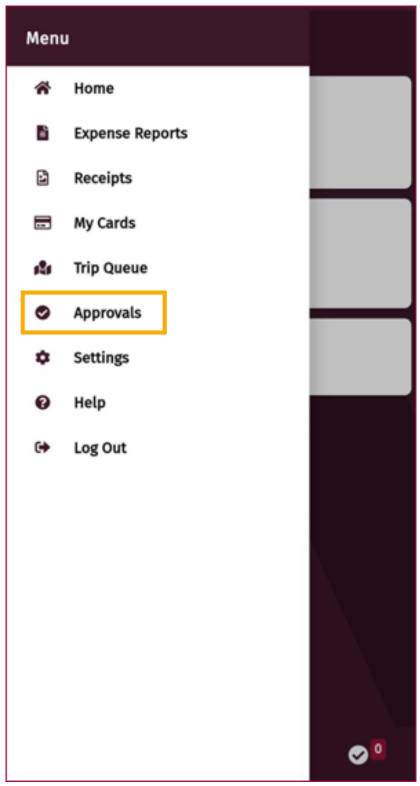


Approve Expense Reports

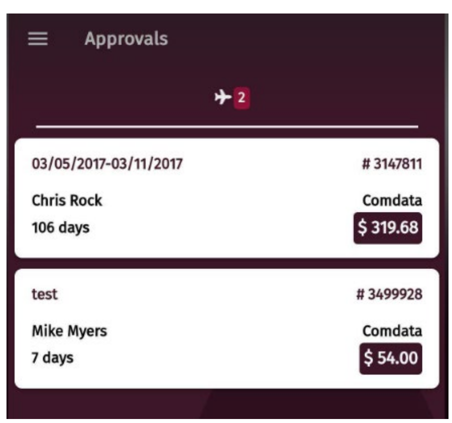
The Expense Track mobile app offers the ability to review and approve expense reports. This feature is useful for quickly approving expense reports when you cannot access a desktop or laptop computer.

1. On the main menu, tap **Approvals**.

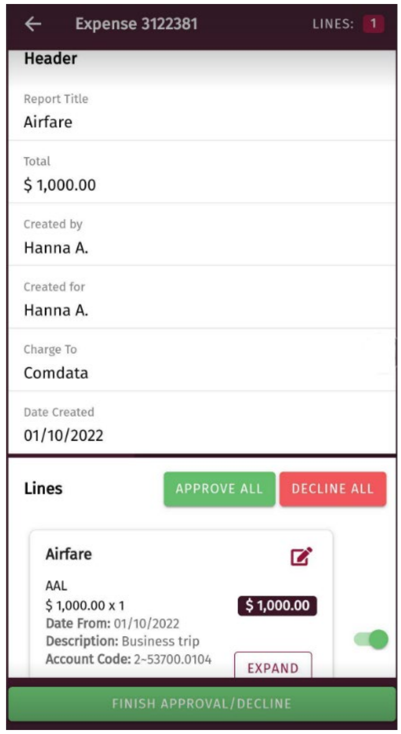
   ***Note**: You can also tap the checkmark icon () in the bottom right corner of the app or the Approvals button on the Home screen. Both options will display the total number of expense reports requiring approval.*



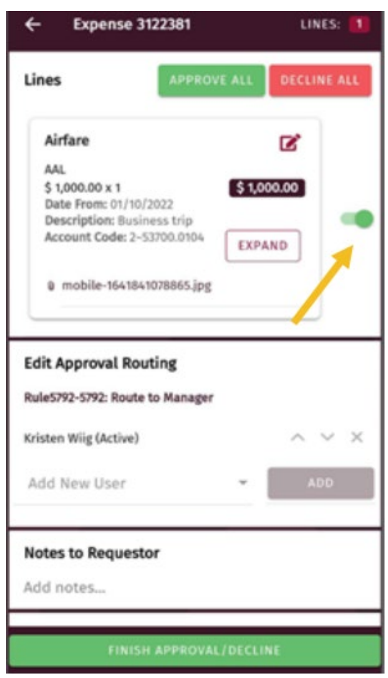
2. The Approvals screen displays all expense reports requiring approval. Each option displays the expense number, total amount, requestor name, number of days in approval, and the charge-to location. Tap a report to open it.



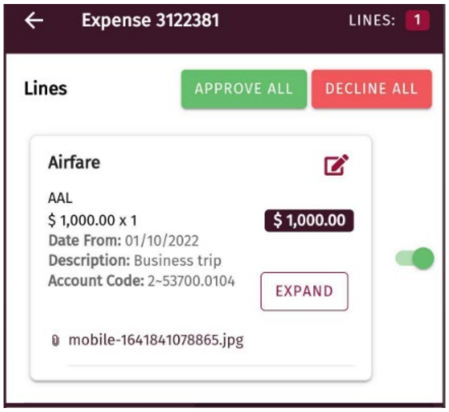
3. Review the report header and expense item details.

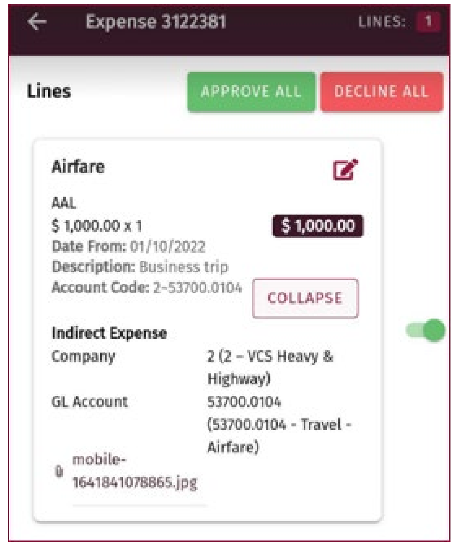


4. Under the Lines section, tap **Approve All** or **Decline All** to approve or decline all expense items at once. You can also approve or decline expense items individually by using the toggle button next to each item.

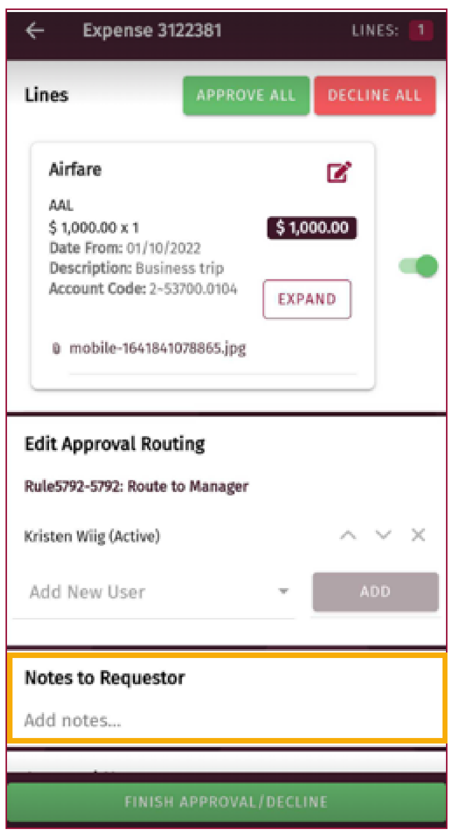


Note: *If the expense item contains accounts coding, tap the* ***Expand*** *button to view a description of each segment in the account code.*



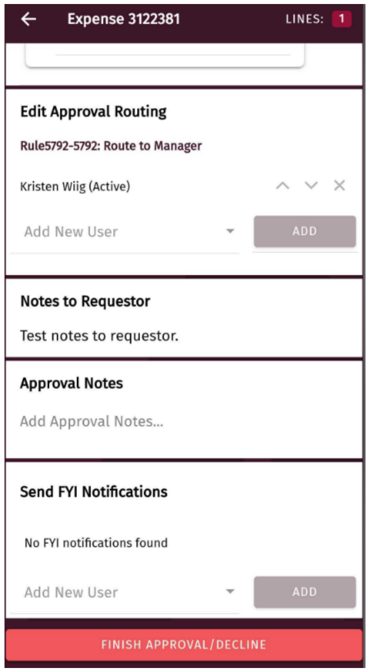


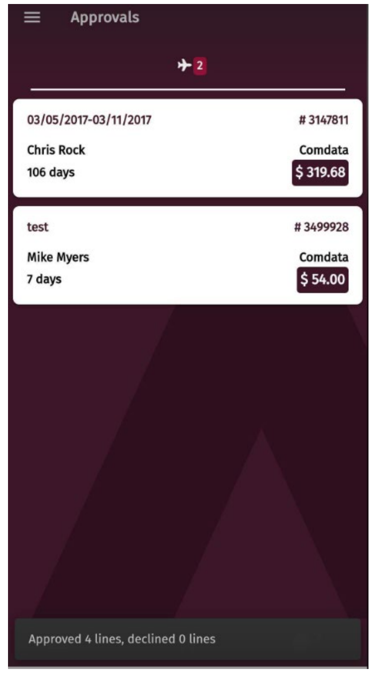
5. If desired, enter a note to the expense requestor in the Notes to Requestor field, such as an explanation for any declined expense items.



6. When finished, tap **Finish Approval/Decline**. The expense report will be removed from the list.

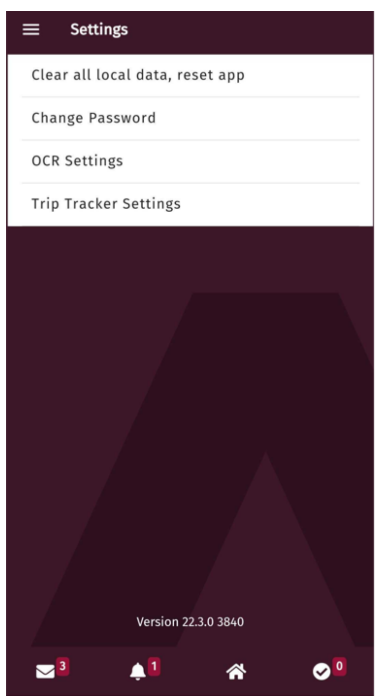
__Note: Finish Approval/Decline__ displays as red if over half of the expense items are declined.





Configure Settings

The Settings screen contains the following four features.



- **Clear all local data, reset app.** Tap this button to clear all data and information within the app and immediately log out. To log back in, you must reenter your instance information, username, and password. This option is useful when troubleshooting issues with your mobile device.
- **Change Password**: If you are logged into the app and need to change your password, you can do so from the app settings. This new password will be used when you log into the mobile application and the website.
- **OCR Settings**: OCR (optical character recognition) automatically scans expense receipts you upload and populates the receipt information in the app. This functionality must first be enabled for your entire organization by an administrator. If it is enabled, you can then choose to enable or disable it for yourself. The OCR is powered by Google Vision.
  Note: OCR relies on mobile data networks to send and receive information. If used, mobile data charges may apply.
- **Trip Tracker Settings**: Before you can use Trip Tracker, you need to make sure it is enabled for your organization and for your own app. For this, the **Enable Trip Tracker** toggle within the **Trip Tracker Settings** has be turned on**.**

The settings screen also contains the current mobile app version number.

Help

Tapping **Help** directs users to an online help resource for using the Corpay Expense Track mobile application. The site helps users by providing a guidance for how to use the app.

Logging Out

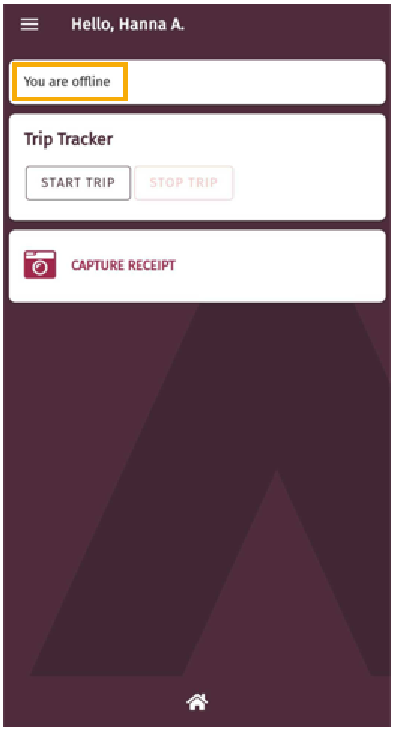
Tapping Log Out logs you out of the Expense Track mobile application. You may also use this option if you want to change the app instance.

Use the Mobile App Offline

The Expense Track mobile app operates with limited functionality when your mobile device is offline (not connected to a data network). However, you can still perform receipt capture.

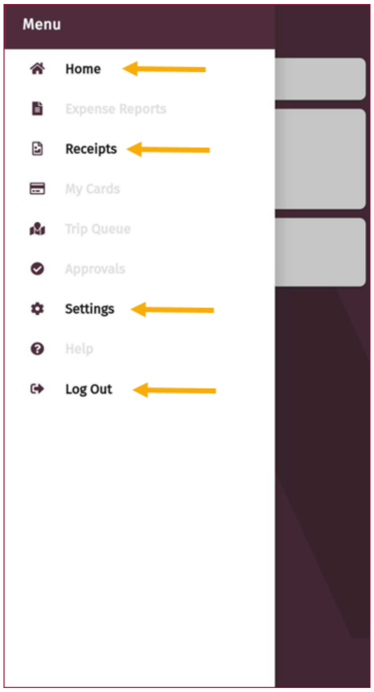
Home Screen

When offline, the Home Screen displays "You are offline." The Messages, Notifications, and Approvals icons are also hidden until you are back online.



Main Menu

On the main menu, only **Home**, **Receipts**, **Settings**, and **Log Out** are available.



Receipt Capture Offline

The Receipts screen displays a notification message that you are offline. However, you can continue to upload receipts by tapping the plus icon. Any receipts added while offline will automatically upload once a connection is reestablished.

***Note:** You cannot add accounts coding to a receipt while offline.*

When you add a receipt, a yellow caution icon displays alerting you the receipt was uploaded offline.

Once you're back online, the receipt image will automatically upload. If for any reason the receipt image does not upload, swipe left on it and tap the Cloud button to manually upload it.