Corpay Complete

User Profile and Users Module

User Guide

Version 1.3

Version	Date	Description of Changes
1.0	07/15/2025	Initial release.
1.1	07/16/2025	Added role information to Bulk Import of Users Using Bulk Operations 2.0.
1.2	09/22/2025	Added Add Last 4 SSN and DOB Information section.
1.3	01/02/2026	Added Access and Authentication section.

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Overview

Corpay Complete is a comprehensive spend management platform that integrates multiple financial processes into a single, easy-to-use system. It offers customization options, seamless integrations with Enterprise Resource Planning (ERP) systems and multiple options for managing personal and role-based access with Corpay Complete's **User Profile** page and **Users** module.

Module Overview

The **Users Module User Guide** explains how to navigate the **Users** module and **User Profile** page. It includes information on how to update user profiles, assign delegates, add and import users, enable or disable users, manage teams, and create a **Contact Listing** report.

This guide is divided into the following sections:

User Profile

The **User Profile** page is visible to **all users** and is utilized to manage user profiles.

Note: Administrators can perform almost all tasks on behalf of staff users in the **Users** module.

Users Module

The **Users** module is used by administrator users for system governance by ensuring that only authorized personnel can access sensitive financial modules like **Payments**, **Cards**, and **Invoices**. It also supports compliance by enforcing role-based access and audit trails.

Note: The **Users** module is only visible to users with **administrator-level** roles, such as **admin_user** or **universal_admin**.

Roles and Permissions Overview

The visibility of fields, tabs, and information in Corpay Complete is determined by a Company's configuration and the roles assigned to users.

As a result, certain pages, information, and features may not be accessible, or the information may be available in a view-only format. These permissions, access levels, and configuration settings should be considered when reviewing this user guide. Refer to the **User Roles and Permissions** section for more information about administrator roles and permissions.

Access and Authentication

Corpay Complete supports several authentication methods to ensure secure access to the platform. The method you use depends on your Company's configuration. This section explains how users access Corpay Complete, how authentication methods differ, and where to complete account-related tasks such as activating your Okta account, updating passwords, resetting **Multi-Factor Authentication (MFA)**, or enabling **Two-Factor Authentication (2FA)**.

How Users Access Corpay Complete

Companies may use one of two primary authentication methods:

- **Single Sign-On (SSO)** using the Company's identity provider (such as Okta, Azure AD, or another SAML provider).
- **Corpay-managed authentication** using Okta, when a Company does not use its own identity provider.

Your Company determines which method applies. The login experience, authentication prompts, and available recovery options vary accordingly.

Single Sign-On, Multi-Factor Authentication, and Two-Factor Authentication

When accessing Corpay Complete, users may encounter several security-related terms: **SSO**, **MFA**, and **2FA**. These terms are often used interchangeably, but they refer to different security processes that can work together.

It is important to understand how these authentication types relate to each other. MFA is completed before a user enters Corpay Complete and is managed either by the Company's identity provider or by Corpay for Corpay-managed Okta accounts. **2FA is separate from MFA** and occurs only after a user logs in to Corpay Complete. 2FA is a user-managed feature within Corpay Complete, and administrators cannot reset it on behalf of a user. If a user loses access to their 2FA device, the Corpay Support Team must assist.

Understanding these concepts will help you identify which steps apply to you and where to go for assistance if you experience issues.

Single Sign-On

SSO allows users to access multiple applications using a single, Company-managed login. If your Company has enabled SSO:

- You log in through your Company's identity provider (for example, Okta).
- You select the Corpay Complete application from your SSO portal.
- You do not enter a Corpay Complete password unless your Company explicitly allows password login.

SSO configuration, authentication policies, and troubleshooting are managed by your Company's IT team—not Corpay.

If **Password Login Enabled** is not selected for a user, they must use SSO to access the platform.

Multi-Factor Authentication

MFA requires users to verify their identity using more than one method, such as:

- A password
- A push notification
- A verification code
- A biometric factor (if supported by your Company)

Two-Factor Authentication

2FA is a type of MFA that requires exactly two factors. In Corpay Complete, 2FA is **separate from SSO** and is **managed directly by each user** inside the platform.

Users may choose to enable 2FA from the **User Profile** page using:

- Twilio Authy, or
- Google Authenticator

Once enabled, Corpay Complete will prompt for a six-digit code from the authenticator app each time the user signs in.

Important characteristics of 2FA in Corpay Complete:

- It is **optional**, unless your Company requires it.
- It is **user-managed**: administrators cannot reset or disable it for a user.
- If a user loses access to their 2FA device, the Corpay Support Team must assist.
- 2FA can apply **in addition** to Company-managed SSO or MFA.

How Authentication Types Work Together

Depending on configuration, users may experience one or more steps when accessing Corpay Complete:

Authentication Step	Managed By	When It Occurs
SSO login	Company identity provider	Before opening Corpay Complete
MFA prompt (Okta Verify, SMS, etc.)	Corpay or Company, depending on Company configuration	Before Corpay Complete is launched
2FA code (Authy or Google Authenticator)	Individual user	After Corpay Complete login

Understanding where each step occurs helps users identify the correct point of contact for support.

- SSO issues must be handled by the Company's IT team.

- Companies can reset Okta passwords in Corpay Complete to troubleshoot login issues. The Corpay Support Team assists with all other Okta-related issues.

- 2FA issues must be handled by the Corpay Support Team.

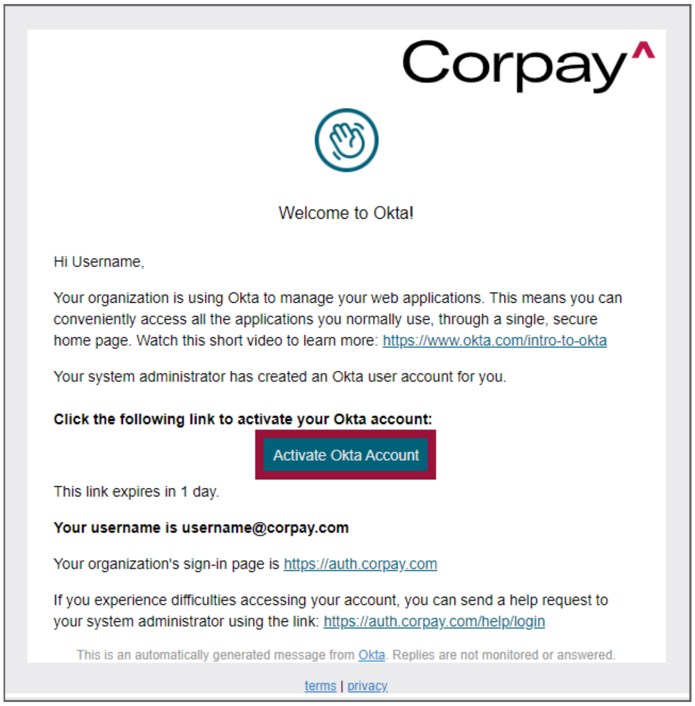
Activate Your Corpay Okta Account

Corpay recognizes the critical nature of data security and provides a secure system to mitigate threats and vulnerabilities. As part of this strategy, Corpay uses Okta to authenticate users before they access Corpay Complete. If your Company requires Okta, you must activate your Okta account before signing in for the first time.

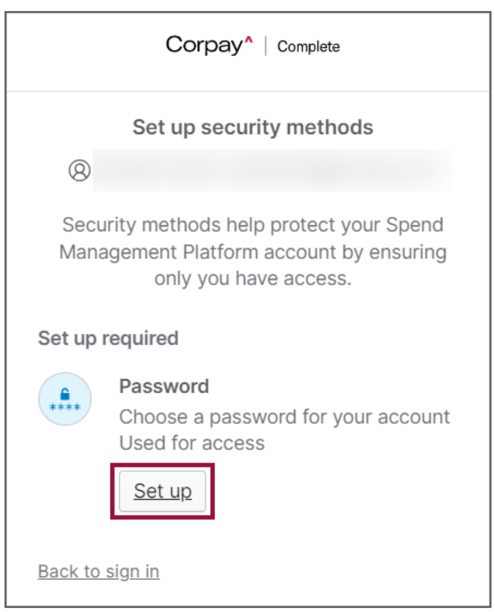
Follow the steps below to complete your Okta activation:

1. An email will be sent to you from **noreply@corpay.com**. The email's subject line will be **Welcome to Okta for Corpay**.

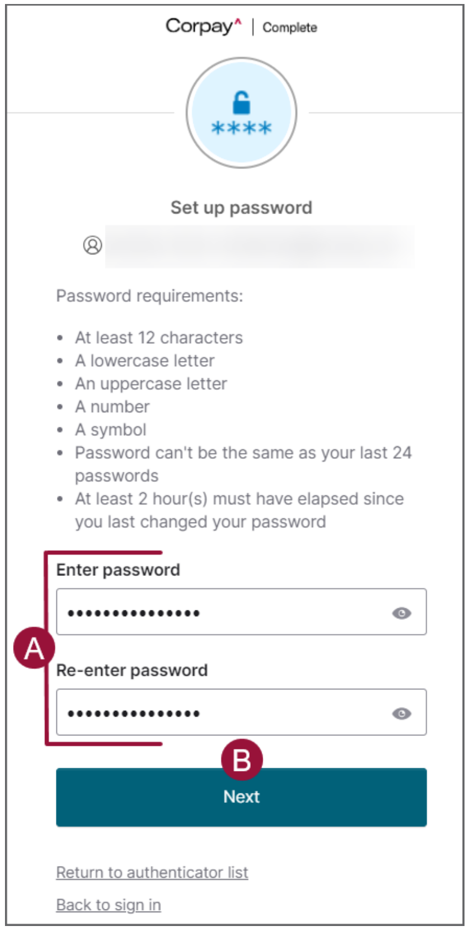
2. Click the **Activate Okta Account** button.



3. Click the **Set up** button in the **Password** section of the **Set up security methods** screen.



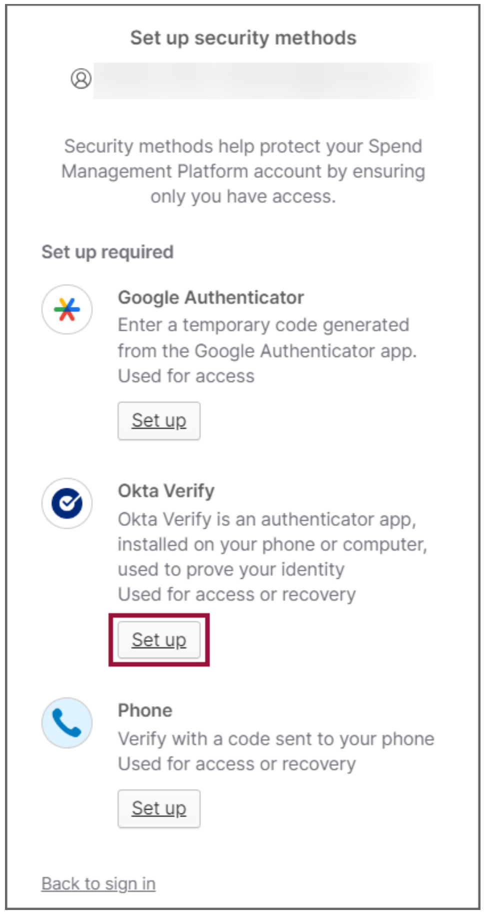
4. Complete the following steps on the **Set up password** page.



A. Key in your password in the **Enter password** and **Re-enter password** fields.

B. Click the **Next** button.

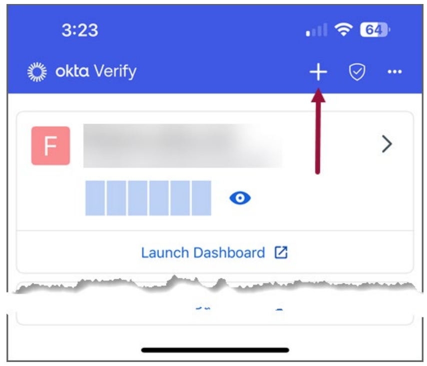
5. Click the **Set up** button in the **Okta Verify** section of the **Set up security methods** page.



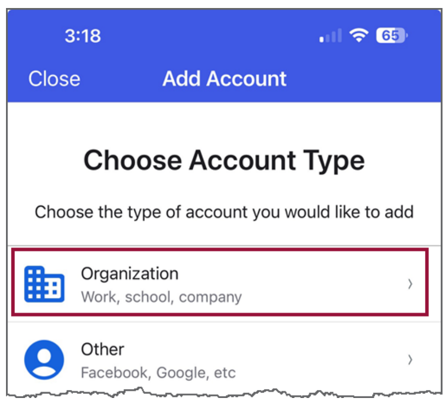
6. On your other device, such as a mobile phone, download the **Okta Verify** app from the **App Store**® (iPhone® and iPad®) or on **Google Play**® (Android® devices).

7. Open the **Okta Verify** app on your device.

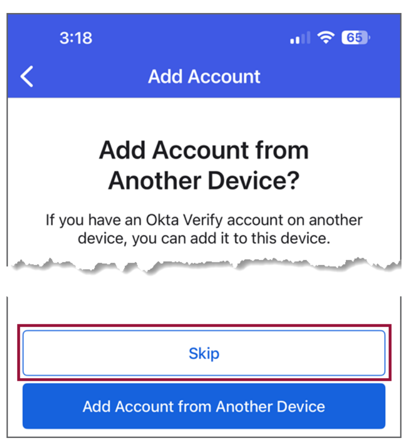
8. Click the **Add Account** icon in the upper right corner of your device.



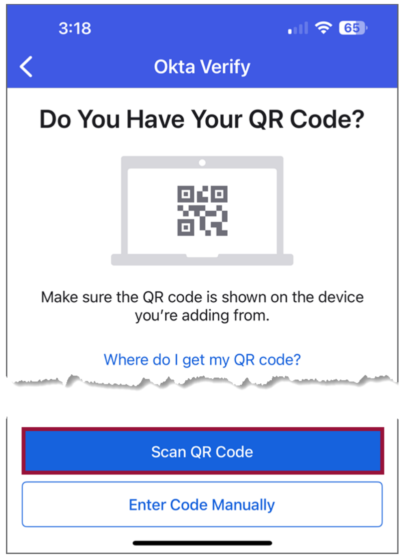
9. Click **Organization** from the **Choose Account Type** page.



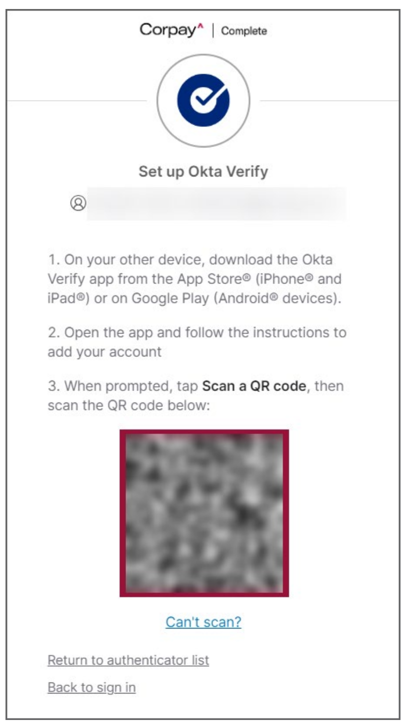
10. On the **Add Account from Another Device?** page, click the **Skip** button.



11. Click the **Scan QR Code** button on the **Do You Have Your QR Code?** page.

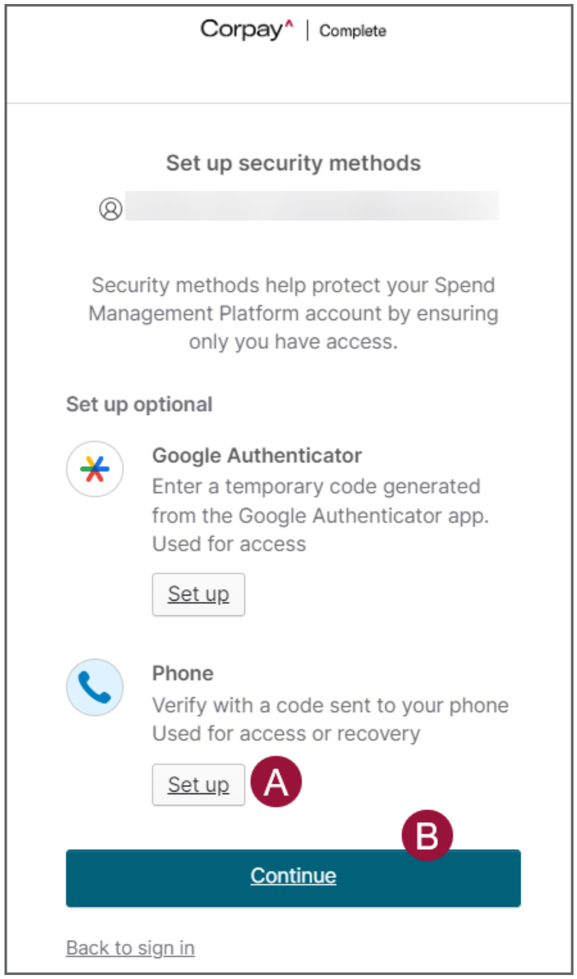


12. Align your device's camera to the **QR code** on the **Set up Okta Verify** page on your computer.



13. Once **Okta Verify** is configured, you will be automatically directed to the **Set up security methods** page.

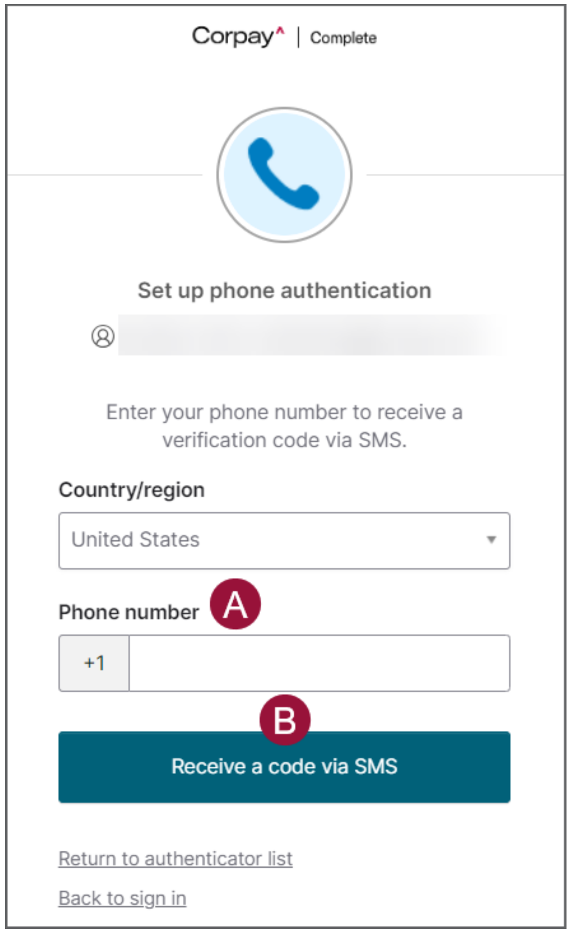
14. Choose one of the following options on the **Set up security methods** page:



A. To add an optional security method, click the **Set up** button under the **Phone** section.

B. Click the **Continue** button and proceed to **step 18** in this document.

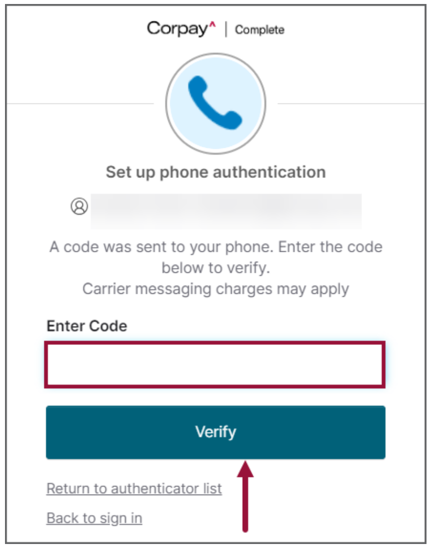
15. Complete the following steps on the **Set up phone authentication** page:



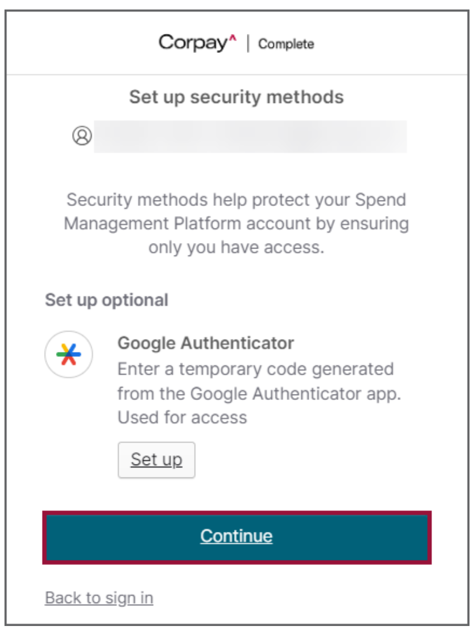
A. Key in your **mobile phone number** in the **Phone number** field.

B. Click the **Receive code via SMS** button.

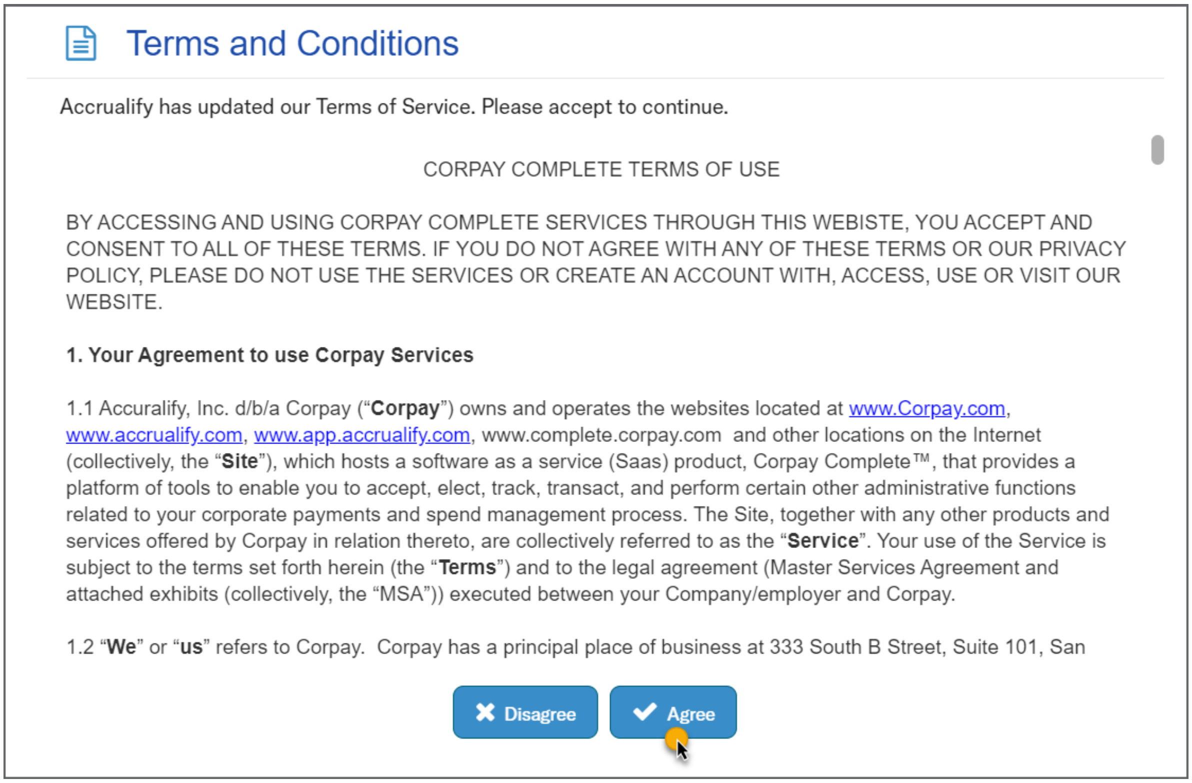
16. Key in the **code** from your mobile phone in the **Enter Code** field and click the **Verify** button.



17. Click the **Continue** button on the **Set up security methods** screen.



18. Review the **Corpay Complete Terms of Use** and click the **Agree** button.



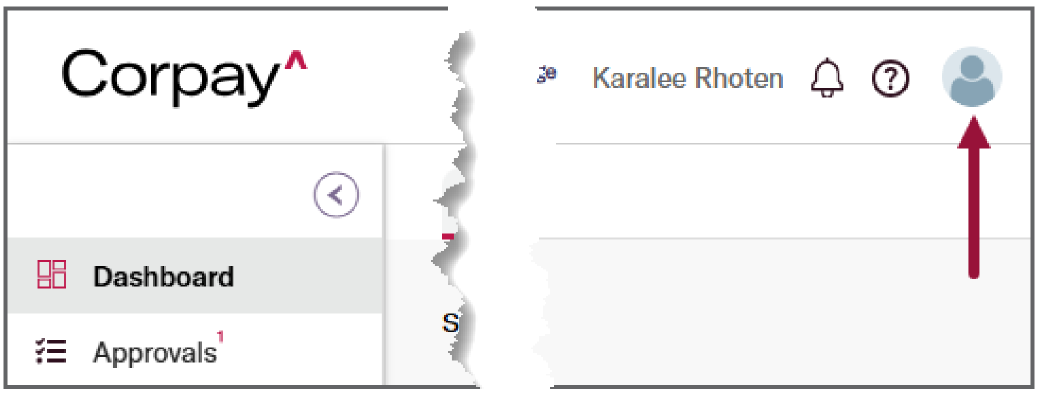
19. You will be directed to the Corpay Complete **Dashboard** page.

User Profile Page

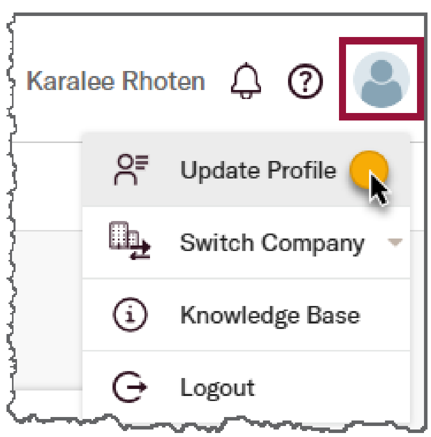
The **User Profile** page serves as a centralized hub for all users to manage their personal settings, security preferences, and account details in Corpay Complete.

Access the User Profile Page

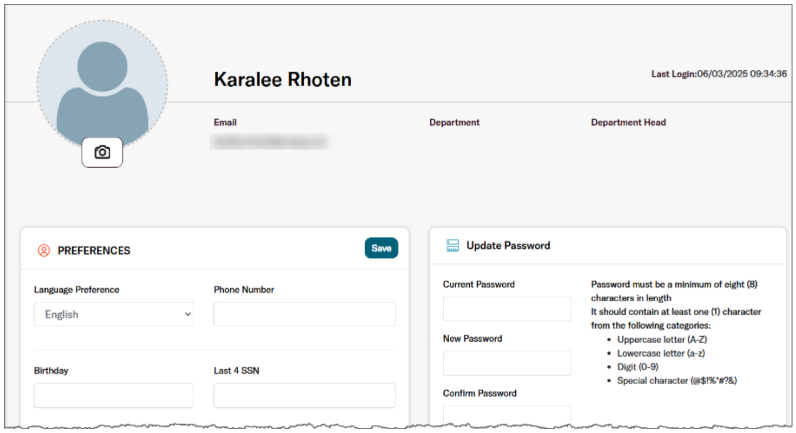
1. From any page in Corpay Complete, click the **Avatar**  icon in the top right corner of the screen.



2. Click **Update Profile** from the drop-down.

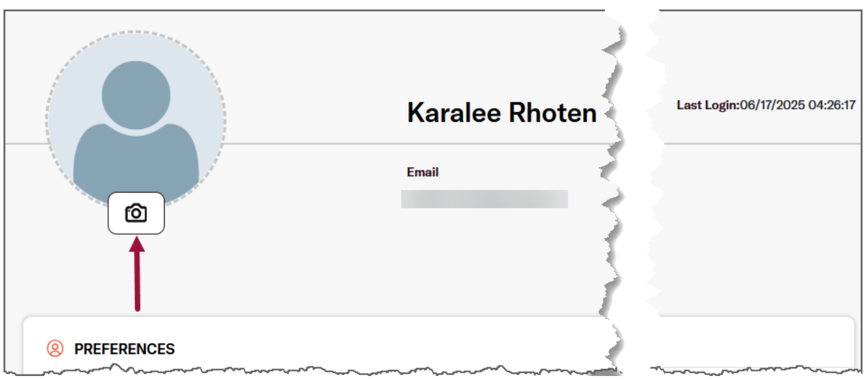


3. The **User Profile** page will be displayed.

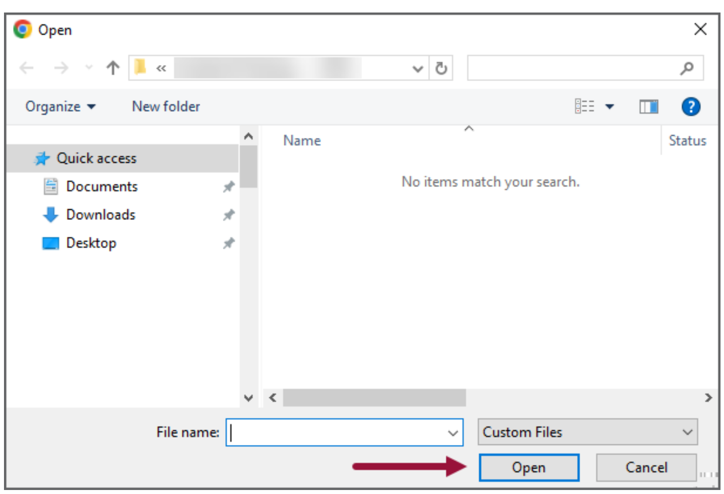


Add or Update Profile Picture

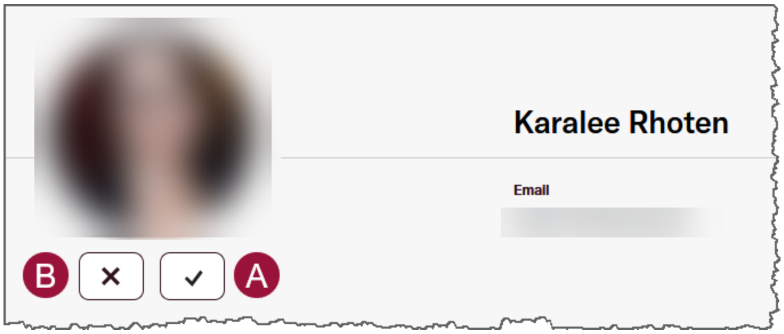
1. To **add or update** a profile picture, click the **camera** icon on the **User Profile** page.



2. In the **Open** dialog, select the image to be used and then click **Open**.



3. The selected picture will load on the **User Profile** page. Choose one of the following options:



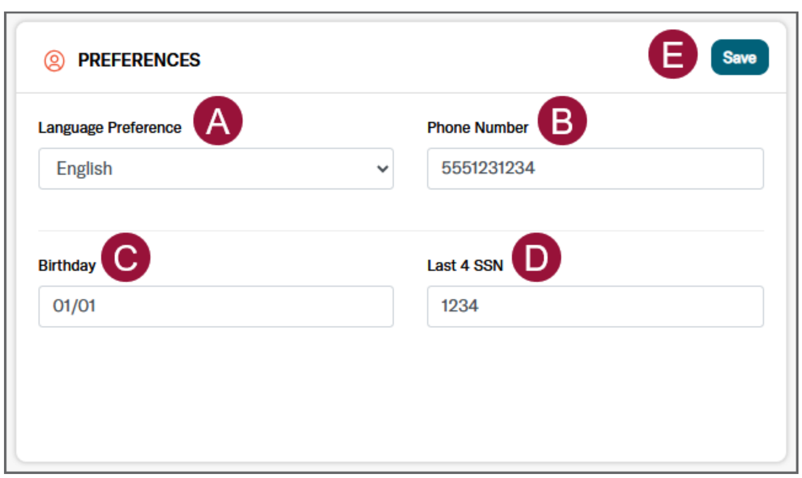
   A. **Approve** – Click the **Approve**  icon to **add** the picture to the **User Profile** page.

   B. **Decline** – Click the **Decline**  icon to **decline** the picture. Repeat **steps 1 and 2** above to select a different picture.

Update Preferences

This section describes how to **add or update user information**, such as date of birth, social security number, and phone number.

1. Navigate to the **Preferences** panel on the **User Profile** page and complete the following fields as needed:



   A. **Language Preference** – Select a **language preference** from the drop-down.

   B. **Birthday** – Key in the user's **month and day of birth** in a **MM/DD format**.

C. **Phone Number** – Key in the user's **phone number** without dashes or special characters.

   Note: This phone number will be used for **Text Alerts & Notifications**.

D. **Last 4 SSN** – Key in the **last four digits** of the user's **social security number (SSN)**.

E. Click the **Save** button.

The user's **date of birth or last four digits of their social security number (US-based users only)** must be added to their **User Profile** for security verification purposes.

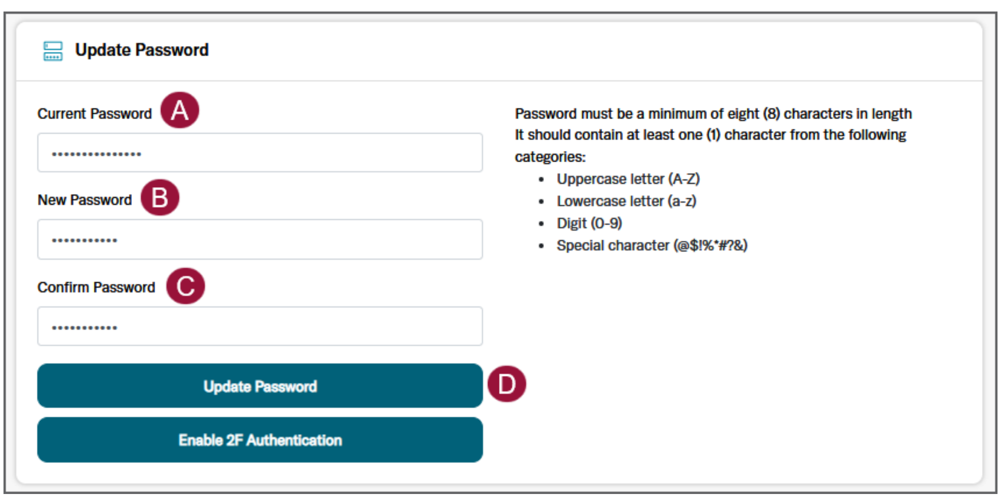
If the DOB or SSN is missing from the **User Profile**, **cardholders** will be unable to contact Corpay for assistance due to insufficient information on their profile to pass Corpay's security verification process.

Update a Password

This section describes how to update a password.

Note: Refer to the Two-Factor Authentication section for information about enabling or disabling two-factor authentication.

1. Navigate to the **Update Password** panel on the **User Profile** page and complete the following fields:



A. **Current Password** – Key in the user's **current Corpay Complete password**.

B. **New Password** – Key in a **new password**. Ensure the new password meets the following requirements:

- At least **eight (8) characters long**.

- Contains at least **one uppercase letter (A-Z)**, **one lowercase letter (a-z)**, a **digit (0-9)**, and a **special character (@$!%*#?&)**.

C. **Confirm Password** – Key in the **new password again**.

D. Click the **Update Password** button.

2. The **Success** dialog will display.

Delegates

The Corpay Complete **Delegate** feature allows users to designate other Corpay Complete users to manage approvals, expenses, or cards on their behalf. **Individual users** may establish a **personal delegate**, whereas **administrator users** have the authority to assign delegates for **any user within the system**. This functionality is particularly beneficial in scenarios such as vacations or extended medical leave.

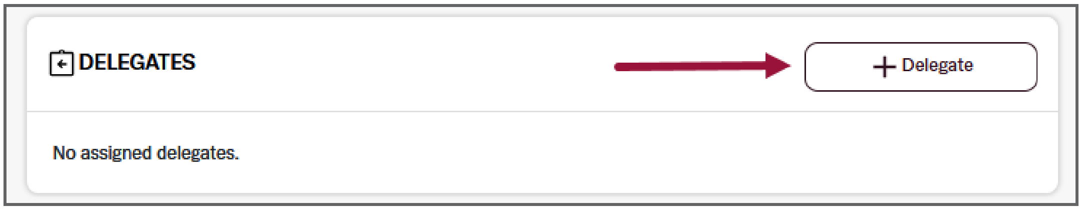
Delegate access and functionality **depends on the user's role**. For example, if a staff user gives **Card** access to a delegate, the delegate will only be able to see the staff user's transactions; they will not be able to make updates.

If a **Virtual Card** administrator gives card access to a delegate, the delegate will be able to make card updates.

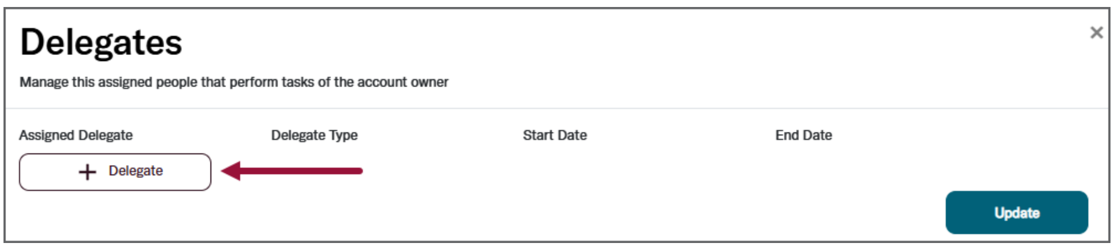
Assign a Delegate

This section describes how to assign a delegate.

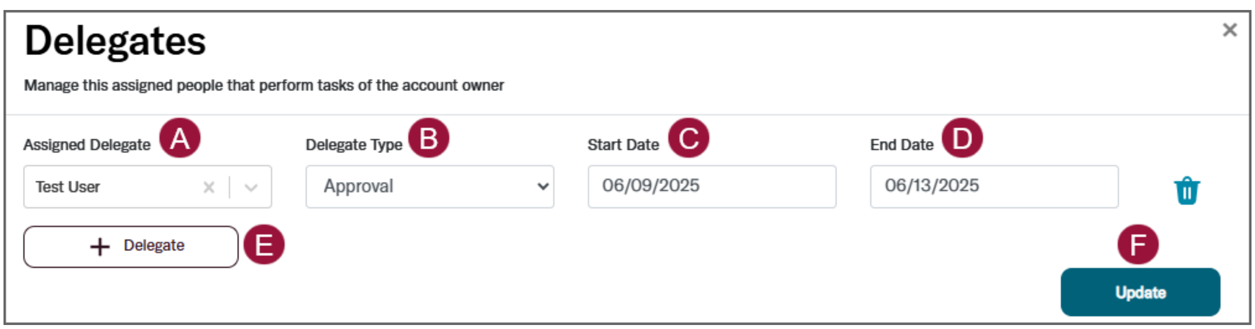
1. Navigate to the **Delegates** panel of the **User Profile** page and click the **+ Delegate** button.



2. In the **Delegates** dialog, click the **+ Delegate** button.



3. Complete the following steps in the **Delegates** dialog:



A. **Assigned Delegate** – Key in text to search or click the drop-down to **select the user** to assign as a delegate.

B. **Delegate Type** – Click the drop-down to select the **delegate type**:

- **All** – Select this option to give the delegate **full delegation access** for approvals, cards, and other actions. For instance, if the user can order a card, the delegate can also order a card.

- **Approval** – Select this option to give the delegate **approval access**, such as approving an invoice or card order. This option **does not** include the ability to **update and edit a card**.

- **Card** – Select this option to give the delegate the ability to **make changes or updates to cards** in the **Cards** module. This option **does not** include **card approval** permissions. The **Card Delegation Type** can be assigned to **up to three users** for the same date range.

- **Change Requests** – Select this option to give the delegate the ability to **edit purchase orders**. For instance, if a purchase order has a quantity of five but it should be four, the delegate can adjust the quantity.

- **Expense** – Select this option to give the delegate the ability to **make changes or updates to expenses** in the **Expenses** module. This option **does not** include **expense approval** permissions.

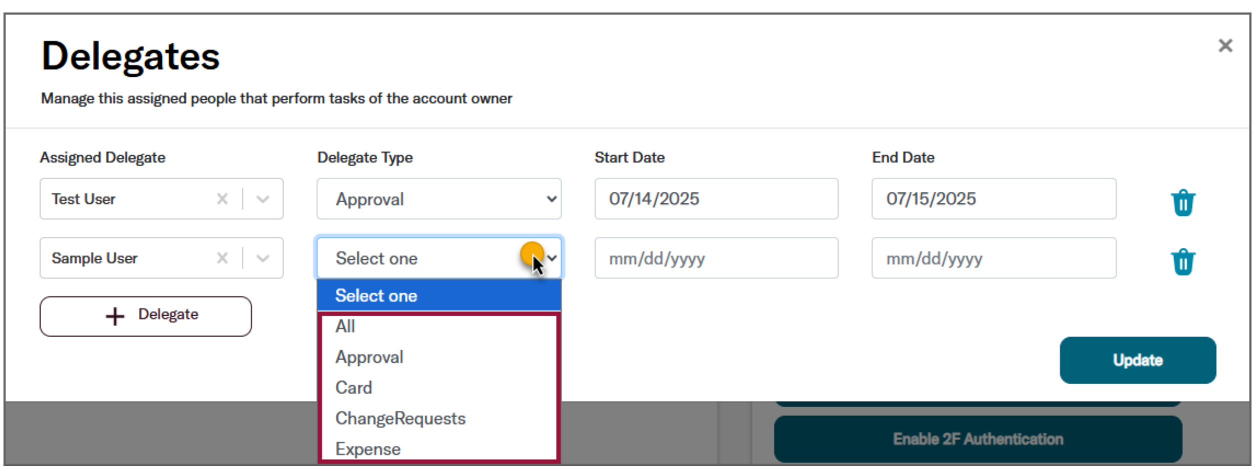
C. **Start Date** – Select the **start date** of when the delegate will start performing the tasks of the account owner.

D. **End Date** – Select the **end date** of when the delegate will stop performing the tasks of the account owner.

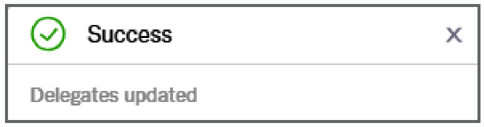
E. Click the **+ Delegate** button to **add another delegate** and repeat **steps A through D** above.

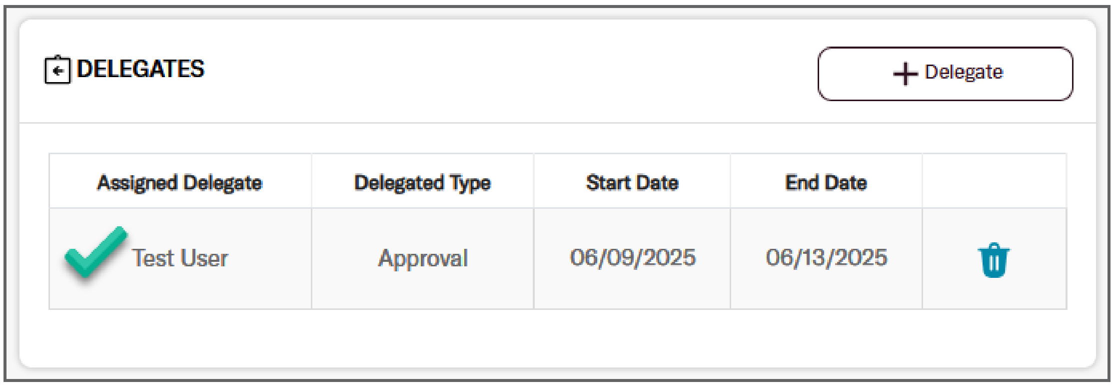
F. Click the **Update** button.

In the following example, Test User is listed as a delegate with the **Approval** type. Sample User can be added as an additional delegate of any type.



4. The **Success** dialog will display, and a notification email will be sent to the assigned delegate(s).

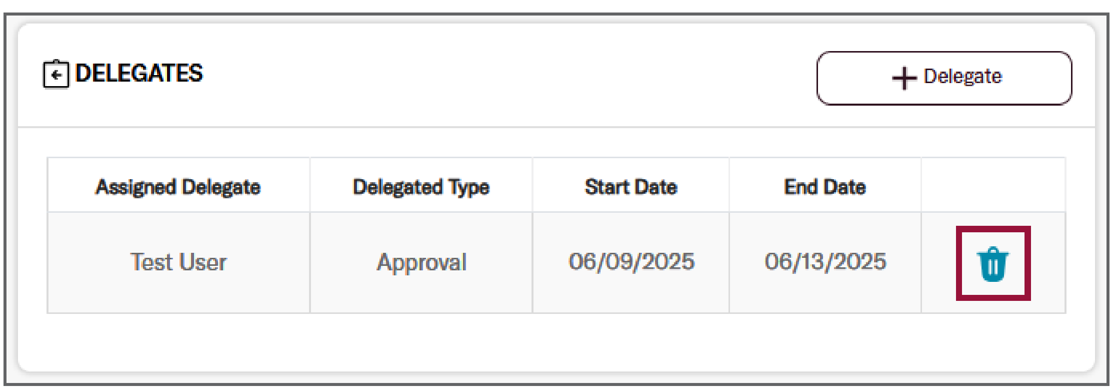




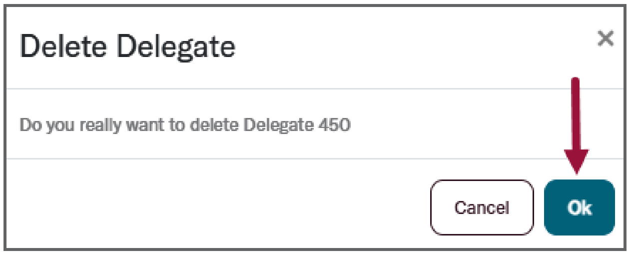
Remove a Delegate

This section describes how to remove an assigned delegate.

1. On the **User Profile** page, scroll down to the **Delegates** section and click the **Delete** icon next to the name of the delegate to be removed.



2. Click **Ok** in the **Delete Delegate** dialog.



3. The **Success** dialog will display, and the delegate will be removed.

Two-Factor Authentication Setup

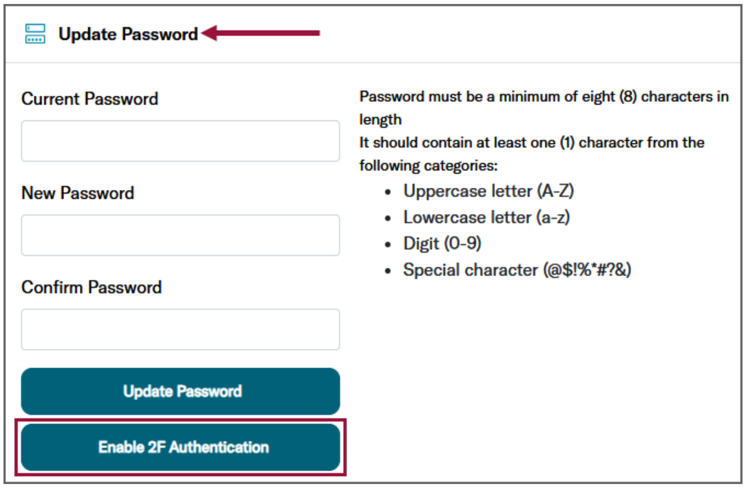
This section explains how to **enable or disable** 2FA in Corpay Complete and how to use an authenticator application to complete the setup.

Enable Two-Factor Authentication

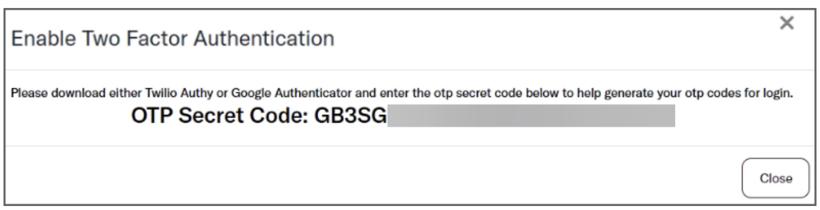
To enable 2FA, either the **Twilio Authy** or **Google Authenticator** application must be downloaded onto the user's mobile device. Users can download either application from **Google Play®** for **Android®** phones or the **App Store®** for **iPhones®**.

IMPORTANT
If a user chooses to enable two-factor authentication, a Company administrator will **not be able to reset this**. 2FA in Corpay Complete is separate from the MFA step that may occur before entering the platform. If a user is locked out of their account and needs support, a Corpay associate will have to assist if two-factor authentication is enabled.

1. Navigate to the **Update Password** section of the **User Profile** page and click the **Enable 2F Authentication** button.



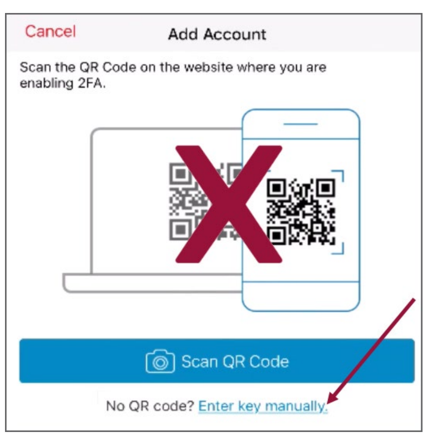
2. The **Enable Two Factor Authentication** dialog will display. On the **user's mobile device**, navigate to and open either the **Twilio Authy** or **Google Authenticator** application.



3. Complete the following steps for either the **Twilio Authy** or **Google Authenticator** application:

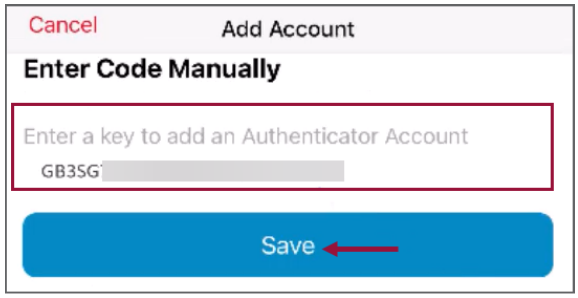
   TWILIO AUTHY

   - Click the **Enter key manually** link. Do **not scan the QR code**.

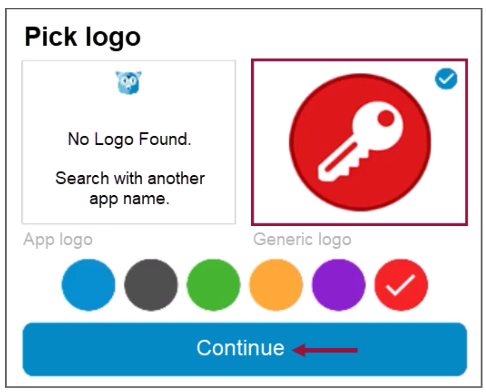


- Key in the **OTP Secret Code** and click **Save**.

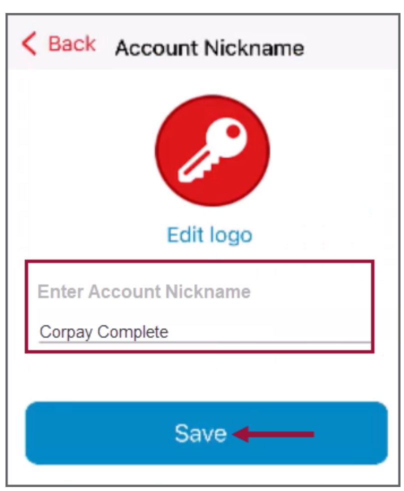
  Note: In the **Twilio Authy** app, the **OTP** code is called the **key**.



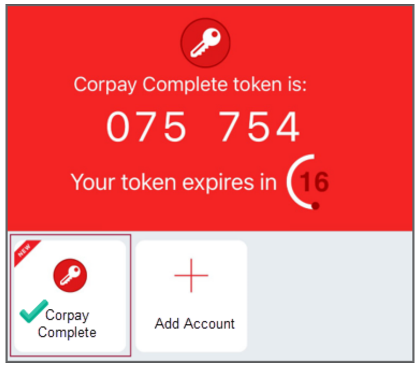
- In the **Pick logo** dialog, click the box with the **red key** icon to select the generic logo, choose a color, and then click **Continue**.



- In the **Enter Account Nickname** field, key in **Corpay Complete** and click **Save**.



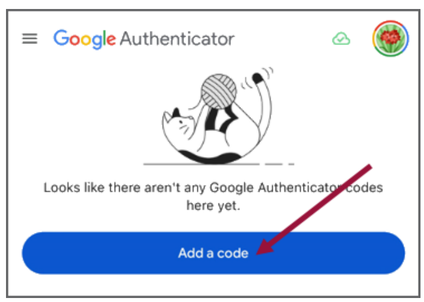
- The Corpay Complete account will be added to Twilio, and the user will now have access to their **six-digit access code**.



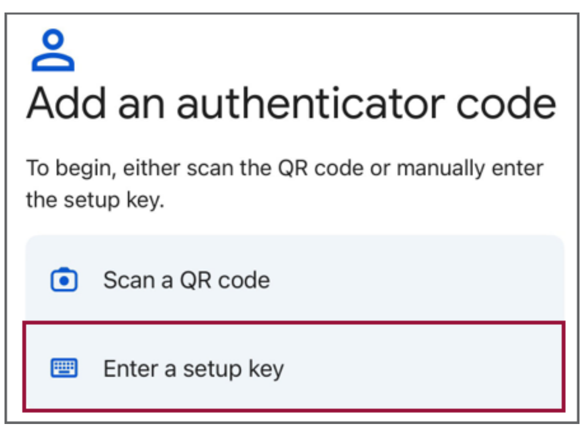
GOOGLE AUTHENTICATOR

- Click **Add a code**.

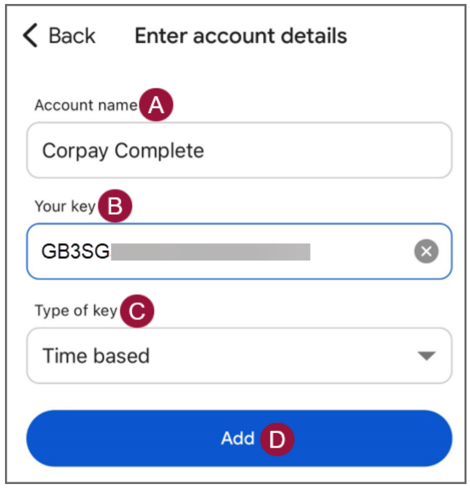
  Note: Users may need to click **Use Authenticator without an account** to display the following screen.



- On the **Add an authenticator code** screen, click the **Enter a setup key** button.



- Complete the following fields in the **Enter account details** dialog:



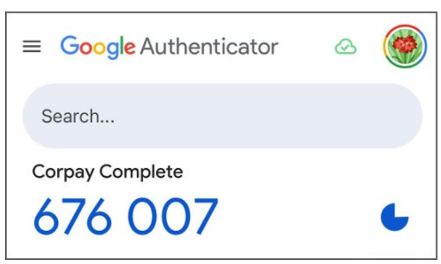
A. **Account name** – Key in **Corpay Complete**.

B. **Your key** – Key in the **OTP Secret Code**.

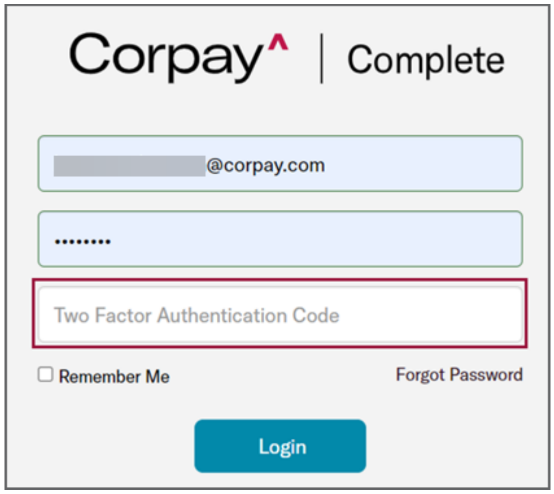
C. **Type of key** – Select **Time based** from the drop-down menu.

D. Click **Add**.

- The Corpay Complete account will be added to Google Authenticator, and the user will have access to their **six-digit access code**.



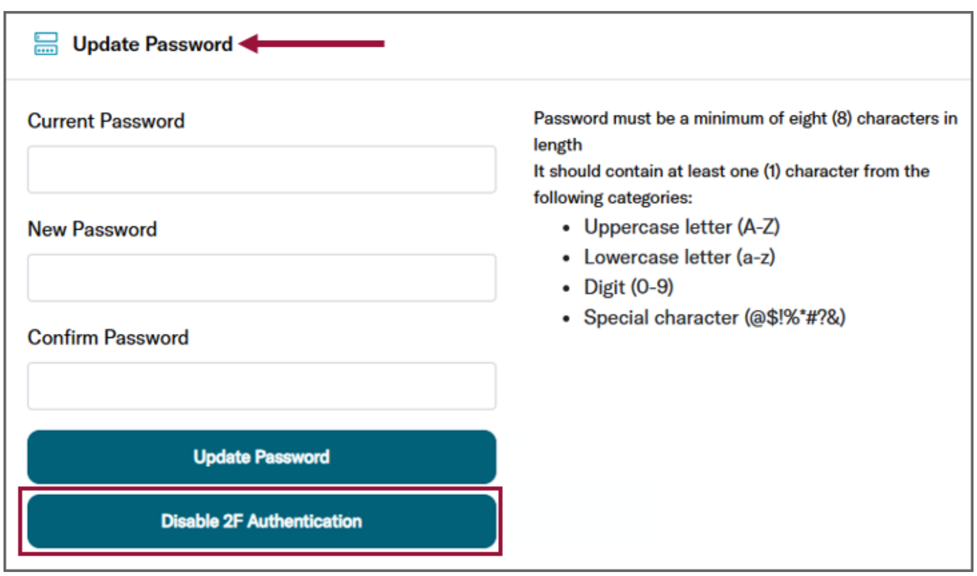
4. The next time the user logs into Corpay Complete, they will be asked to key in the **six-digit code** from the **Twilio Authy** or **Google Authentication** application.



Disable Two-Factor Authentication

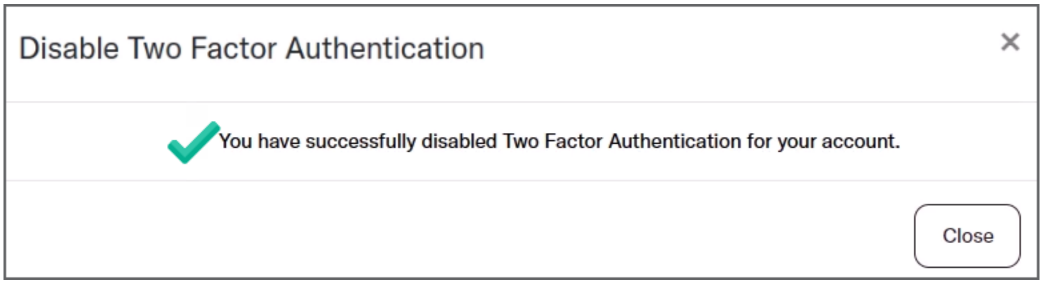
This section describes how to disable two-factor authentication.

1. Navigate to the **Update Password** section of the **User Profile** page and click the **Disable 2F Authentication** button.



2. The **Disable Two Factor Authentication** dialog will display.

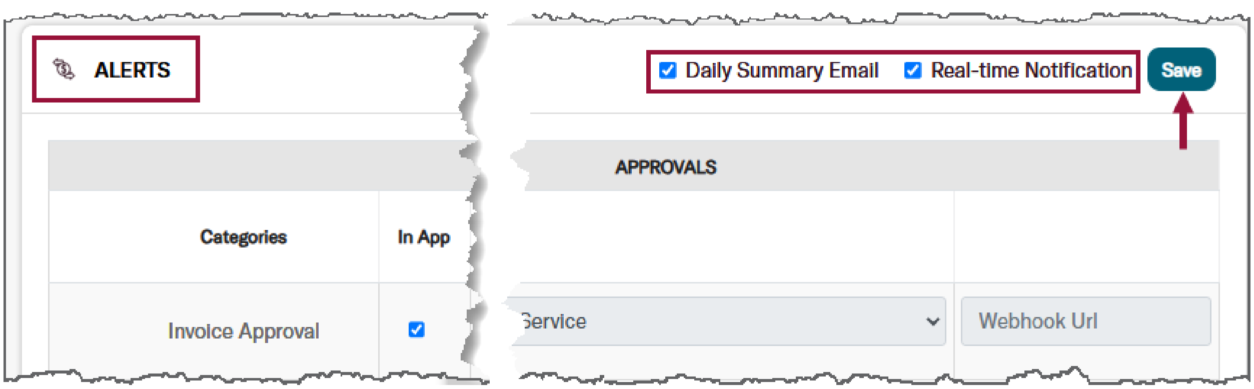
    - To reinstate two-factor authentication, users must repeat the two-factor authentication process and key in a new **OTP code**.



Update Email and Message Notifications

All users can update the manner and frequency of their Corpay Complete notifications. This section describes how to update Email and Message Notifications.

1. On the **User Profile** page, scroll down to the **Alerts** section and navigate to the checkboxes for **Daily Summary Email** and **Real-time Notification**. Review the selections and click **Save**.



- Check the box for **Daily Summary Email** if the user wishes to receive an email that **summarizes any outstanding actions** on Corpay Complete.

- Check the box for **Real-time Notification** to receive in-app and email notifications of **any activity assigned to the user** on Corpay Complete.

  Note: Both boxes are checked by default.

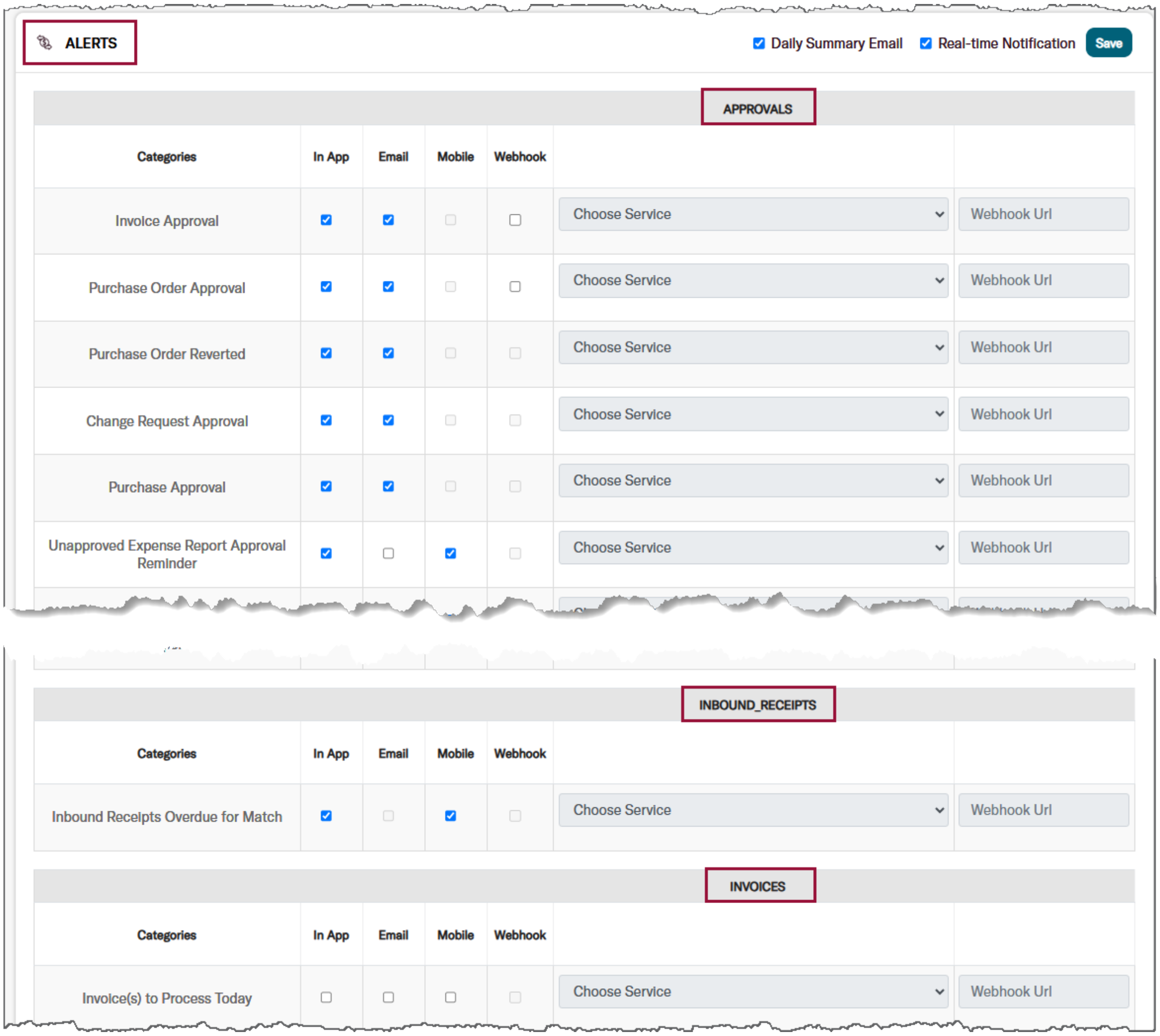
2. The **Alerts** panel is divided into **twelve sections**:

   Note: Only three of the twelve sections are shown on the following page.

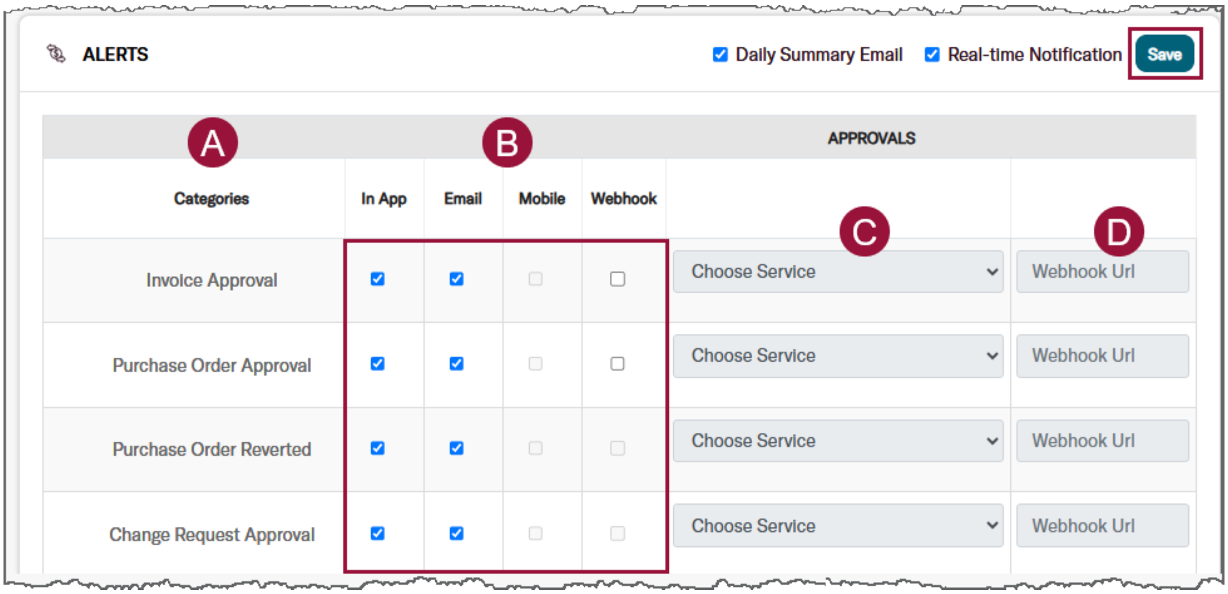
   - Approvals
   - Payments
   - File Integration
   - Expense Items
   - Inbound Receipts
   - Invoices
   - Expense Reports
   - VCards
   - Receipt Queue
   - Messages
   - Fraud
   - Company.

   All users, regardless of their **role** or what **modules their Company uses**, have access to all twelve sections.

   Note: If users enroll in **Mobile Alerts**, the telephone number listed in their **User Profile** will be used. To update this telephone number, refer to the **Update Preferences** section.


ALERTS
Daily Summary Email
Real-time Notification
Save
APPROVALS
Categories
In App
Email
Mobile
Webhook
Invoice Approval
Purchase Order Approval
Purchase Order Reverted
Change Request Approval
Purchase Approval
Unapproved Expense Report Approval Reminder
Choose Service
Webhook Url
INBOUND_RECEIPTS
Inbound Receipts Overdue for Match
INVOICES
Invoice(s) to Process Today

3. Go to the **section** to be edited. Make selections based on the guidelines provided below and click **Save**.



A. **Category** – This column indicates the **activity that will prompt the notification**.

B. **Alert Preference** – Select the **preferred notification method(s)** by marking the appropriate checkbox(es).

- **In App** – A **pop-up notification** in Corpay Complete.
- **Email** – An **email notification**.
- **Mobile** – If available, a **mobile app notification**.
- **Webhook** – **Do not select** this option.

C. **Choose Service** – This field is disabled and **cannot be edited**.

D. **Webhook URL** – This field is disabled and **cannot be edited**.

Users Module

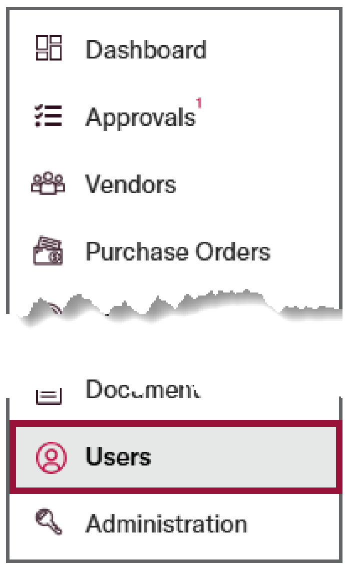
The Corpay Complete **Users** module is an administrative feature used to manage user access, roles, and permissions throughout the platform.

IMPORTANT
The **Users** module is only accessible to users with administrator roles.

Access the Users Module

This section describes how to access the **Users** module in Corpay Complete.

1. Click the **Users** module in the left-side navigation pane.



2. The **Users** module will display.

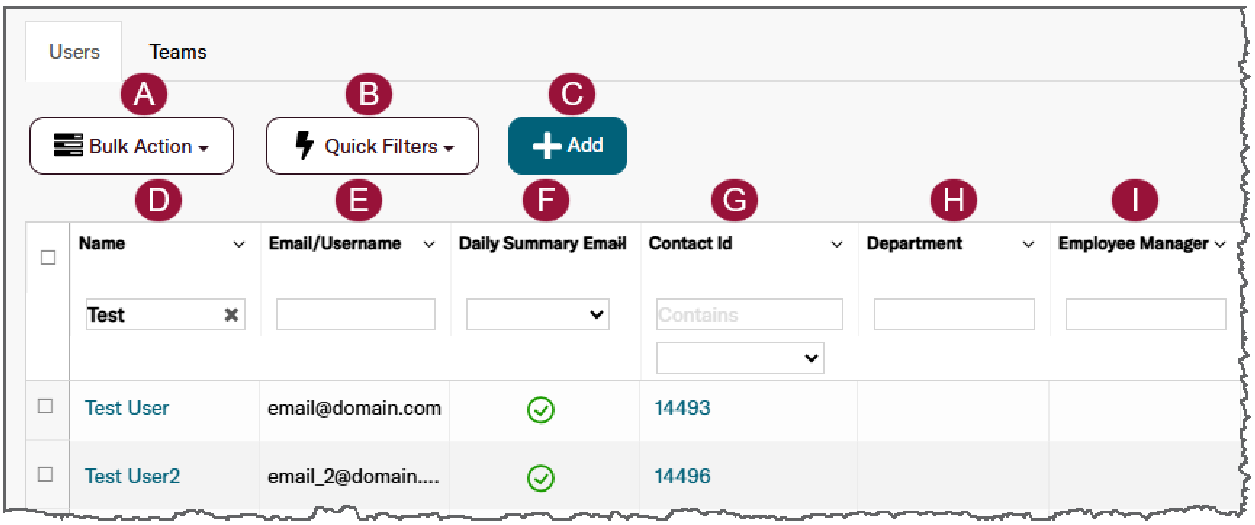
Users Tab

The **Users** tab is where administrators can view, edit, manage, and add users in Corpay Complete.

Note: Visible columns depend on selections made in the **Column Editor**.

Users Tab – Part 1

This section describes the fields and actions in the first part of the **Users** tab.



A. **Bulk Action** – Select the **Bulk Action** drop-down and click **Send Welcome** after selecting one or more users in the **Users** grid to send a **welcome email**.

B. **Quick Filters** – Select the **Quick Filters** drop-down and click **Clear Filters** to remove all filters from the **Users** grid.

C. **+ Add** – Click the **+ Add** button to **add a new user**.

D. **Name** – This column displays the **user's name**.

E. **Email/Username** – This column displays the user's **email/username**.

F. **Daily Summary Email** – This column indicates whether a user is receiving a **daily summary email**. Users who are receiving a **daily summary email** show a green check ✓ while users who are not display a red x ⊗.

G. **Contact Id** – This column displays the **unique identifier** for the user.

I. **Department** – This column displays the user's **department**.

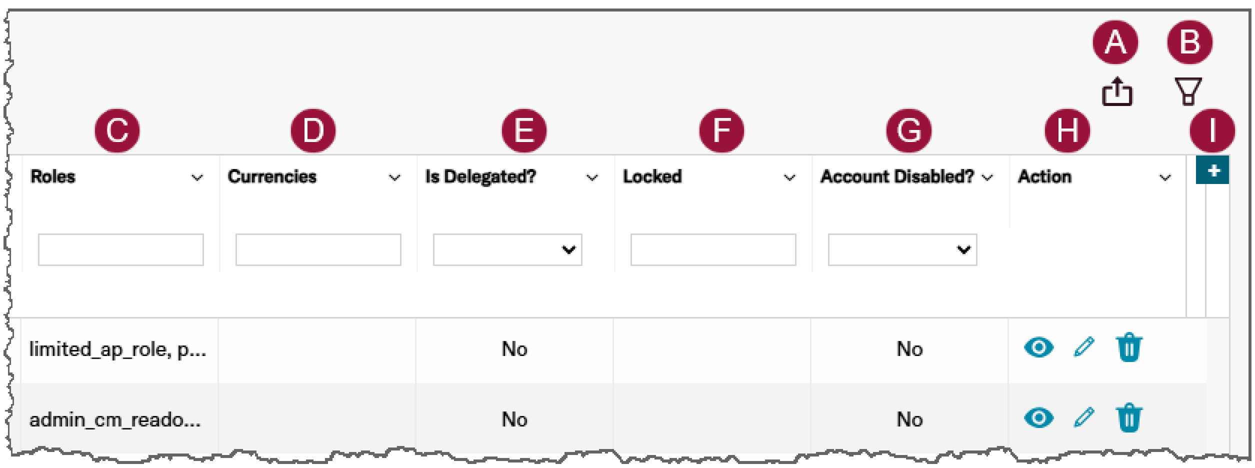
Note: The **Department** must be added during user creation or editing before it will display in this column.

J. **Employee Manager** – This column displays the user's **manager**.

Note: The **Employee Manager** must be added during user creation or editing before it will display in this column.

Users Tab – Part 2

This section describes the fields and actions in the second half of the **Users** tab.



A. **Import Users** – Click the **Import Users** icon to **import users in bulk**.

B. **Toggle Filter** – Click the **Toggle Filter** icon to **show or hide** the **filter fields**.

C. **Roles** – This column displays the **roles** assigned to the user.

D. **Currencies** – This column displays the user's **currencies**.

E. **Is Delegated?** – This column indicates whether an **account owner** has **delegated the user**.

F. **Locked** – This column indicates whether the user's **account is locked**.

G. **Account Disabled?** – This column indicates whether the user's **account has been disabled**.

H. **Action** – This column displays the following **Action** icons:

- **View** – Click the **View** icon to **open the User Details** page.
- **Edit** – Click the **Edit** icon to **open the Edit User** page.
- **Delete** – Click the **Delete** icon to **delete a user**.

IMPORTANT
Users **should be disabled instead of deleted**. Deleting a user **removes all data attached to the user** including transactions and expenses.

I. **Column Editor** – Click the **Column Editor** to display the following options:

- **Export all data as csv** – This option **exports all data** into a downloadable CSV file. The CSV file includes both visible and hidden columns from the **Column Editor**.
- **Export visible data as csv** – This option **exports visible data** into a downloadable CSV file. Hidden columns are not included in the CSV file.
- **Columns** – This option enables users to **include or exclude** columns from the **Users** grid. Columns with a **check** icon are currently visible, while columns with an **X** icon are hidden. Click the icon to **add** a column or click the icon to **remove** a column.

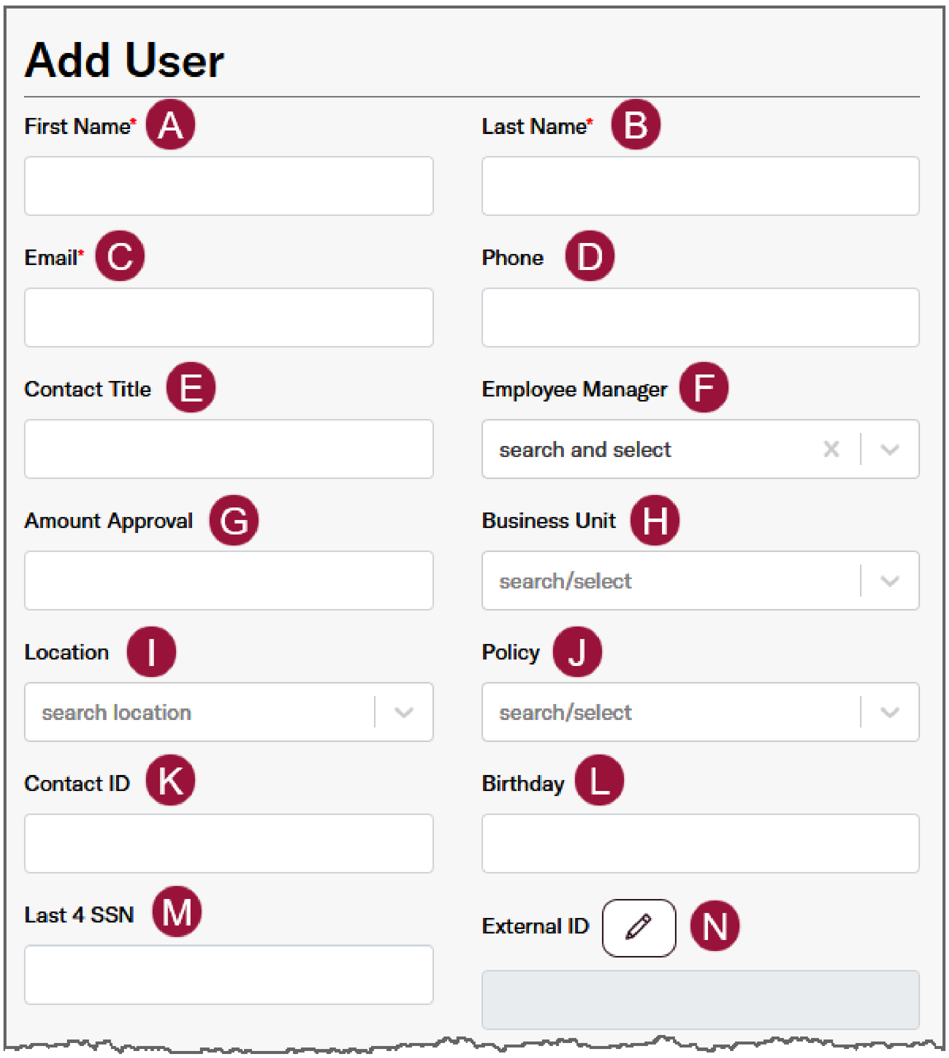
Add a User

This section describes how administrators can add a single user from the **Users** tab.

IMPORTANT
After creating a new user, make sure to send a welcome email so that the new user can log in and update their password.

1. On the **Users** tab of the **Users** page, click the **+ Add** button.

2. Complete the following fields on the **Add User** page:



A. **First Name** – Key in the user's **first name. This field is required**.

B. **Last Name** – Key in the user's **last name**. **This field is required**.

C. **Email** – Key in the user's **email address**. **This field is required**.

D. **Phone** – Key in the user's **telephone number**. Ensure the telephone number **does not include the prefix or any dashes**. For example, **5555551234**.

   Note: This is the telephone number that will be used for their **Mobile Alerts & Notifications**.

E. **Contact Title** – Key in the user's **job title**.

F. **Employee Manager** – Key in text to search or use the drop-down to select the user's **manager**.

G. **Amount Approval** – Key in the **maximum amount** that the user can **approve**.

H. **Business Unit** – Key in text to search or use the drop-down to select the user's **business unit**.

   Note: Business Units must be uploaded using **Bulk Operations** in the **Administration** module before this field can be used.

I. **Location** – Key in text to search or use the drop-down to select the user's **location**.

   Note: Locations must be uploaded using **Bulk Operations** in the **Administration** module before this field can be used.

J. **Policy** – This field is only applicable to users who utilize the **Expenses** module. Key in text to search or select the **Company card policy** that applies to the user.

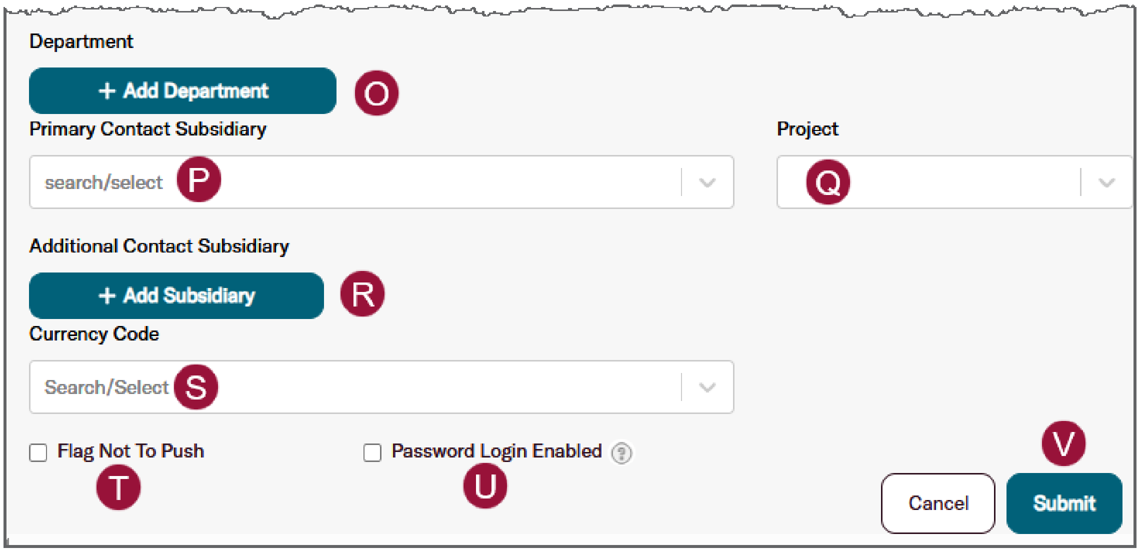
K. **Contact ID** – If the **Cards** module is in use, key in the **Employee ID** number as it will be required once a card is assigned. If this field is left blank, a **Contact ID** will be automatically generated.

L. **Birthday** – Key in the user's **date of birth in a MM/DD format**. The year is not required.

M. **Last 4 SSN** – Key in the **last four digits** of the user's **social security number**.

   Note: This field is only visible to Customers that have a **valid US-based address**.

N. **External ID** – This field cannot be edited.



O. **+ Add Department** – Click the **+ Add Department** button if the user needs to be **linked to one or more departments**.

   Note: Departments must be uploaded using **Bulk Operations** in the **Administration** module before this field can be used.

P. **Primary Contact Subsidiary** – Key in text to search or use the drop-down to select the user's **primary contact subsidiary**. There can only be **one name** in this field.

   Note: The **Subsidiary** module must be configured to use this field.

Q. **Project** – Key in text to search or use the drop-down to select the name of a specific **project**.

R. **+ Add Subsidiary** – Click the **+ Add Subsidiary** button to add an **additional subsidiary**.

S. **Currency Code** – Key in text to search or use the drop-down to select the user's **default currency code**.

T. **Flag Not To Push** – Select this checkbox if the user **does not need** to be pushed to the **Company's ERP**. Otherwise, leave it unchecked.

U. **Password Login Enabled** – This checkbox relates to a user's ability to sign in using a **password** and a **single sign-on (SSO)** for their Company.

   - If the checkbox **is selected**, the user can log in to Corpay Complete using their login and password, and they do **not have to use their Company's SSO**.

   - If the checkbox **is not selected**, the **user must utilize their Company's SSO** to log in.

V. **Submit** – Click the **Submit** button when the **Add User** form is complete. If any required fields are left blank, the user will be prompted to key in data before submitting.

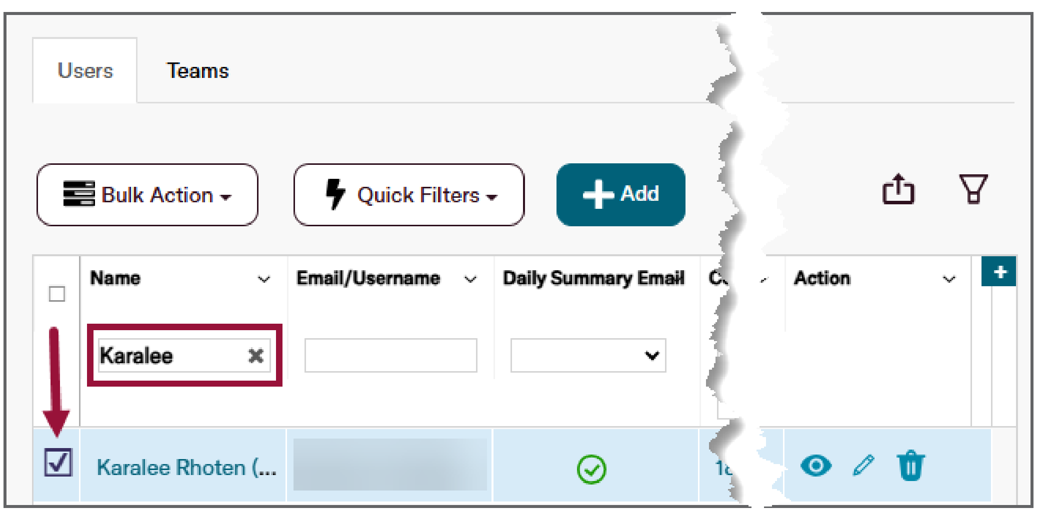
3. The **Added** dialog will display, and the user will be automatically redirected to the **Users** tab.

4. Proceed with sending a welcome email so that the user can log in, activate their account, and update their password.

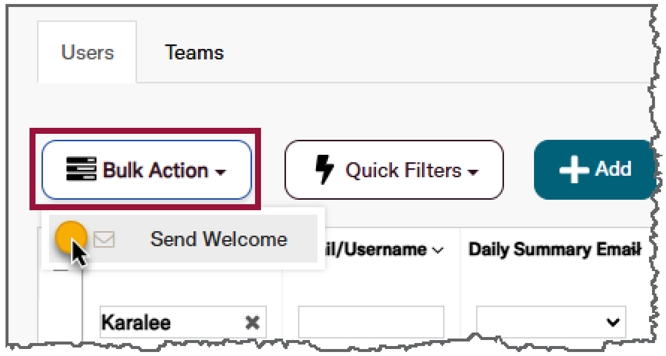
Send/Resend a Welcome Email

After creating a user, administrators must send a welcome email for login, account activation, and password setup. If the user does not receive it, the following steps can also be used to resend it.

1. In the **Users** grid on the **Users** tab, use the **filter fields** to find the desired user(s), and select the **checkbox(es)** next to their name(s).

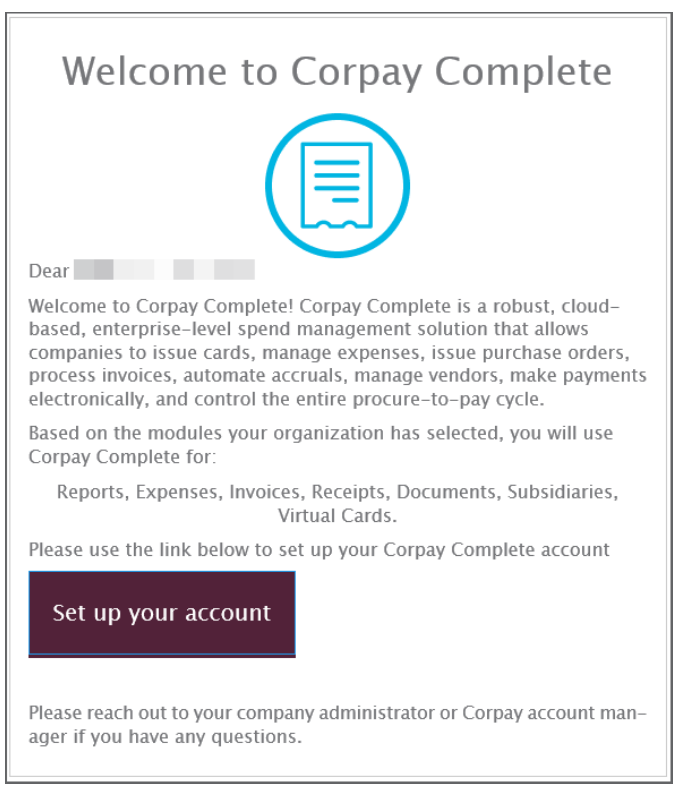


2. Select the **Bulk Action** drop-down and click **Send Welcome**.



3. The **Welcome email sent** dialog will display, and the user will receive a welcome email like the following example.

   Note: Inform the user to watch for the welcome email and have them check their spam folders if they did not receive it.



Bulk Import of Users Using Bulk Operations 2.0

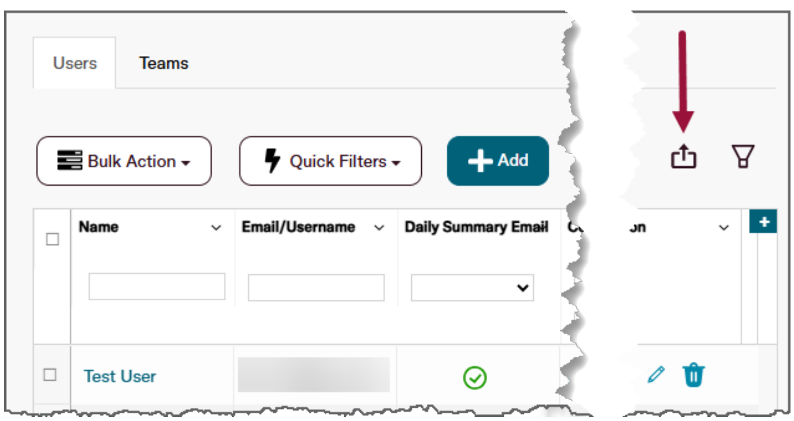
The **Bulk Operations 2.0** feature provides expanded bulk import functionality. This feature gives users the ability to monitor the status of bulk uploads and track the progress of imported user files. Users can select either standard file templates or customized file templates.

Customized file templates must be configured by Corpay for each Company before they can be used in Corpay Complete. Contact the Corpay Support Team at **techsupport@corpay.com** for assistance with customized templates.

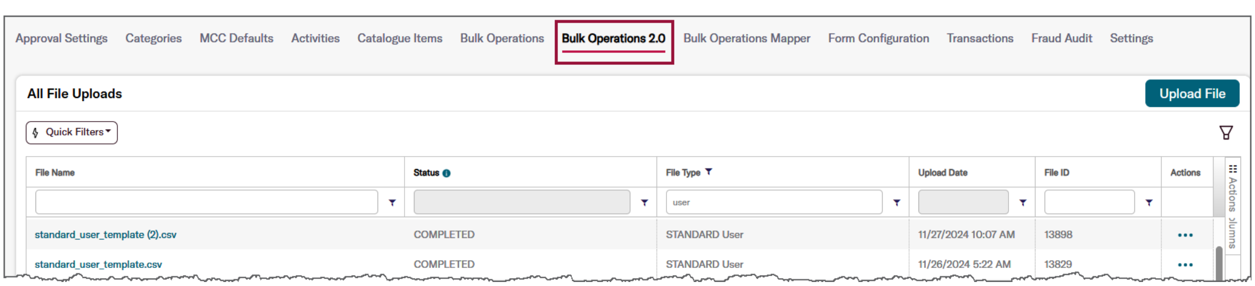
Note: Users must have the **universal_admin** or **bulk_operation_2** user role to use **Bulk Operations 2.0**.

IMPORTANT
After creating new users, make sure to **send a welcome email** so that the users can log in and update their password.

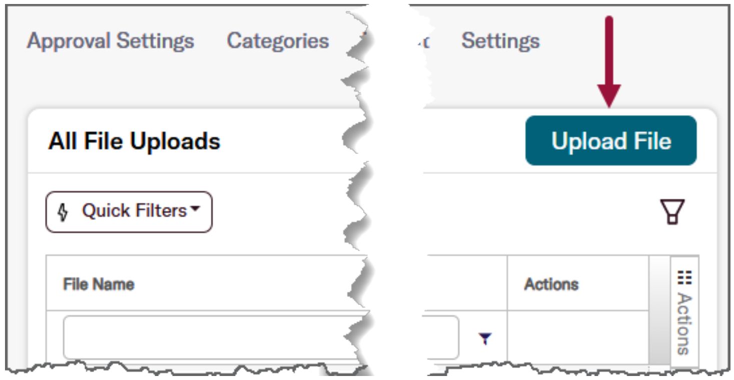
1. On the **Users** tab of the **Users** page, click the **Import Users** icon.



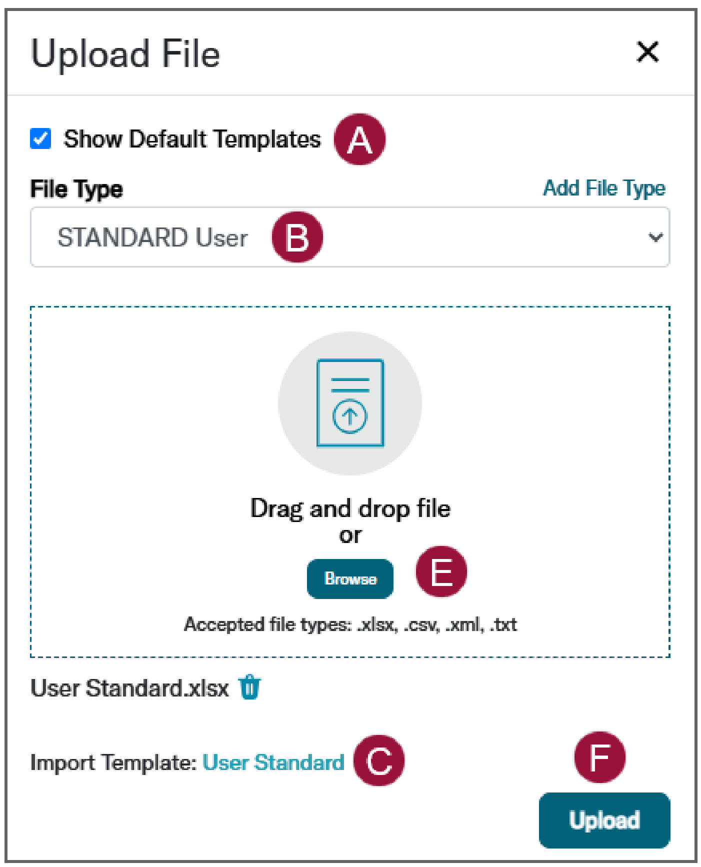
2. The **Bulk Operations 2.0** tab will open in the **Administration** module.



3. Click the **Upload File** button at the top of the **All File Uploads** grid.



4. Complete the following steps in the **Upload File** dialog:



A. Click the **Show Default Templates** checkbox if a standard template will be used.

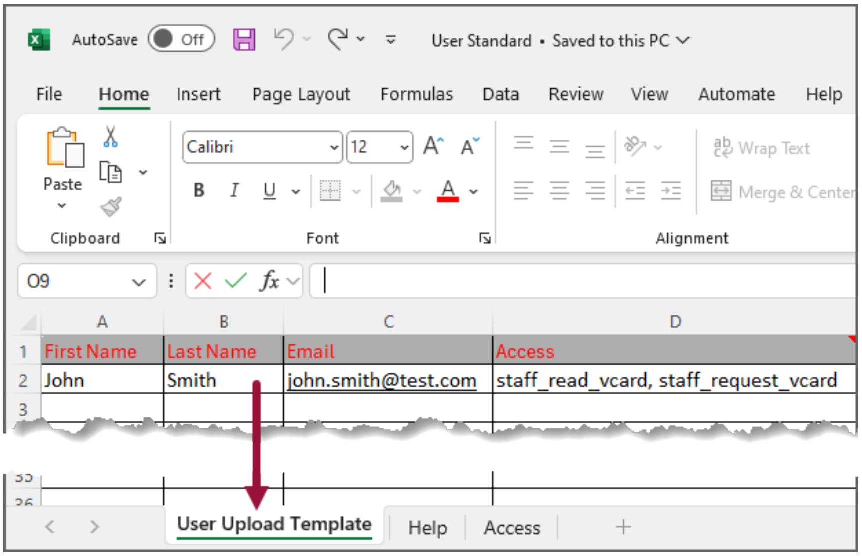
B. Choose the desired template by selecting the **file type** from the **File Type** drop-down.

C. The **Import Template** will display. Click the **link** to download it.

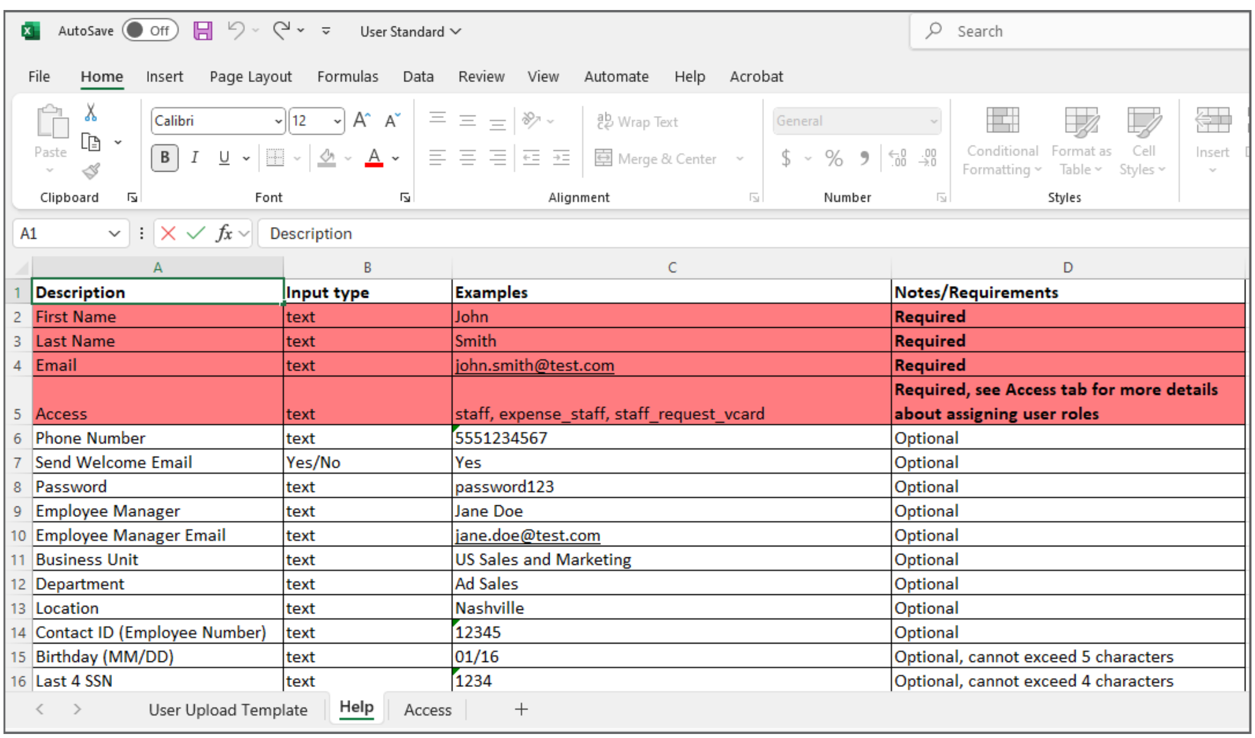
Note: This option may not display depending on the selected template.

D. Complete the information in the user file template:

- If the **User Standard template** is selected, click the **User Upload Template** tab in the Excel file to view a template example.



- If the **User Standard** template is selected, click the **Help** tab to view the **required fields** for the template and **data types** for each field.



Description	Input type	Examples	Notes/Requirements
First Name	text	John	Required
Last Name	text	Smith	Required
Email	text	john.smith@test.com	Required
Access	text	staff, expense_staff, staff_request_vcard	Required, see Access tab for more details about assigning user roles
Phone Number	text	5551234567	Optional
Send Welcome Email	Yes/No	Yes	Optional
Password	text	password123	Optional
Employee Manager	text	Jane Doe	Optional
Employee Manager Email	text	jane.doe@test.com	Optional
Business Unit	text	US Sales and Marketing	Optional
Department	text	Ad Sales	Optional
Location	text	Nashville	Optional
Contact ID (Employee Number)	text	12345	Optional
Birthday (MM/DD)	text	01/16	Optional, cannot exceed 5 characters
Last 4 SSN	text	1234	Optional, cannot exceed 4 characters

E. **Drag and drop**, or click **Browse Files**, to attach the completed user file.

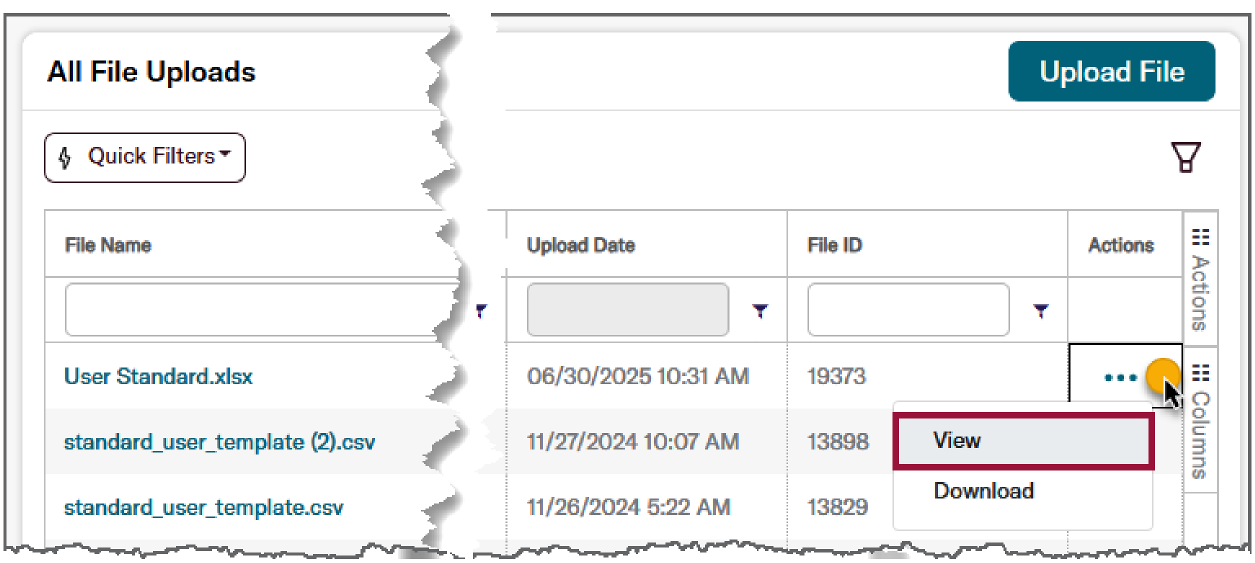
F. Once the user file is attached, click the **Upload** button.

5. The **Saved** dialog will display, and the user file will begin processing.

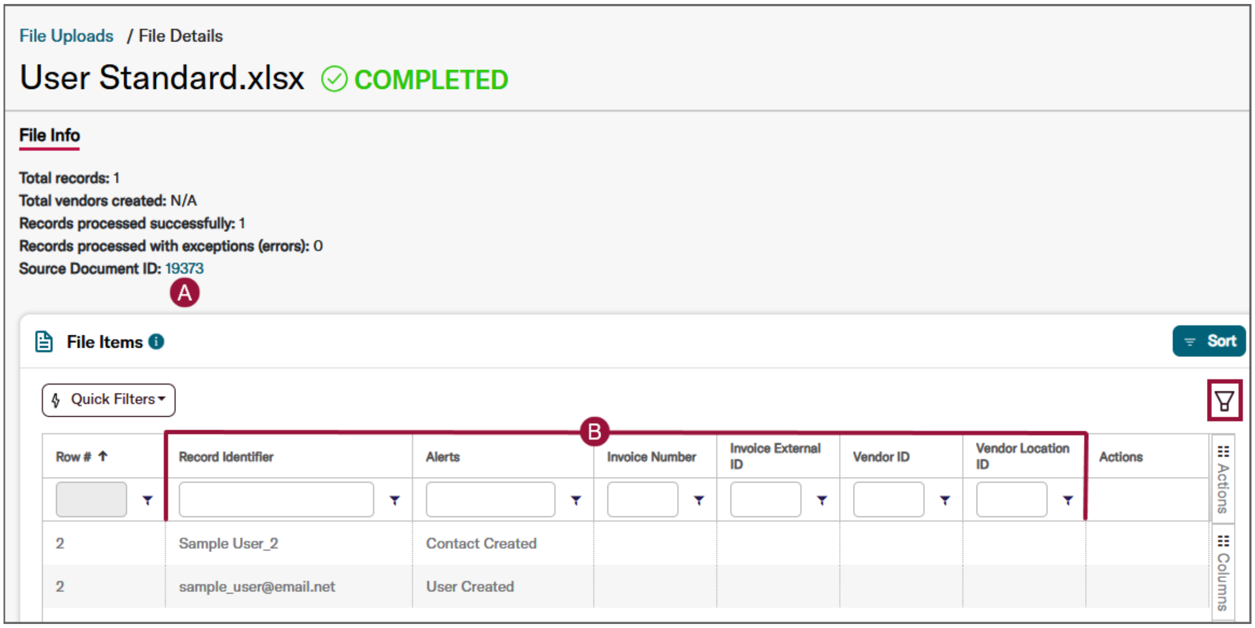
6. Upon completion, the user file will display one of the following **Status** messages:

- **Pending Processing** – The user file is in the process of being uploaded.
- **Completed** – The users were successfully uploaded to Corpay Complete.
- **Completed with Errors** – Some users were not created in Corpay Complete because of errors in the file.

7. To review the user file upload details, select the **ellipses** ••• icon in the **Actions** column, and click **View**.



8. On the **File Details** page, review the user file details using these options:

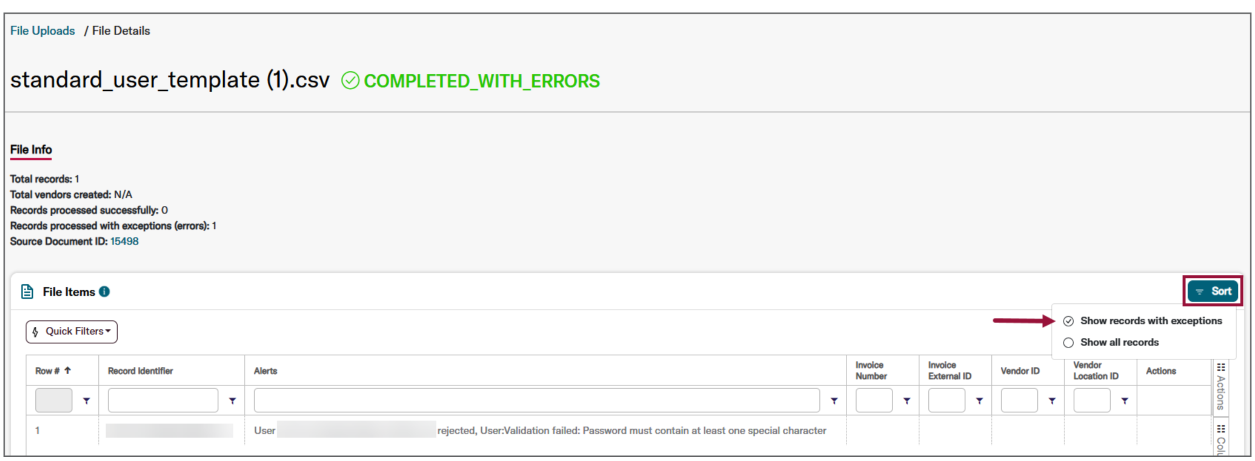


A. Click the **Source Document ID** link to **download** a copy of the user file.

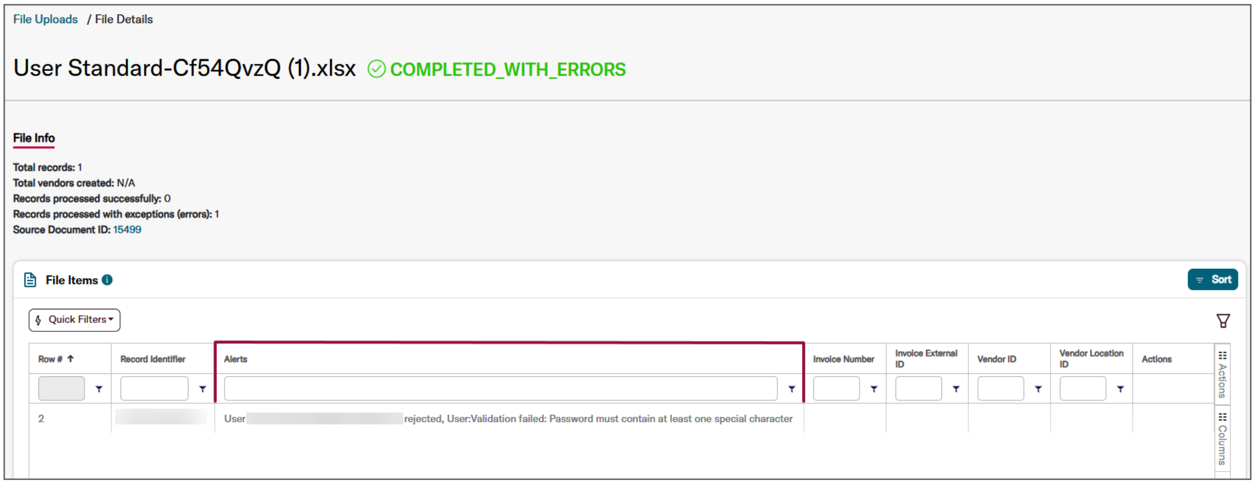
B. Use the **filter fields** to locate a specific user in the **File Items** grid. Click the **Toggle Filter**  icon to **show or hide** the **filter fields.**

Note: Contacts and users are created simultaneously. A **contact** allows an individual to **have a card**, while a **user grants access to Corpay Complete**.

9. If there are errors in the uploaded user file, they will display at the top of the **File Items** grid. Users can also select the **Sort** drop-down and click **Show records with exceptions** to filter the grid by item exceptions.



10. Review the information in the **Alerts** column, **correct the necessary information** in the CSV file, and **upload the user file** again.

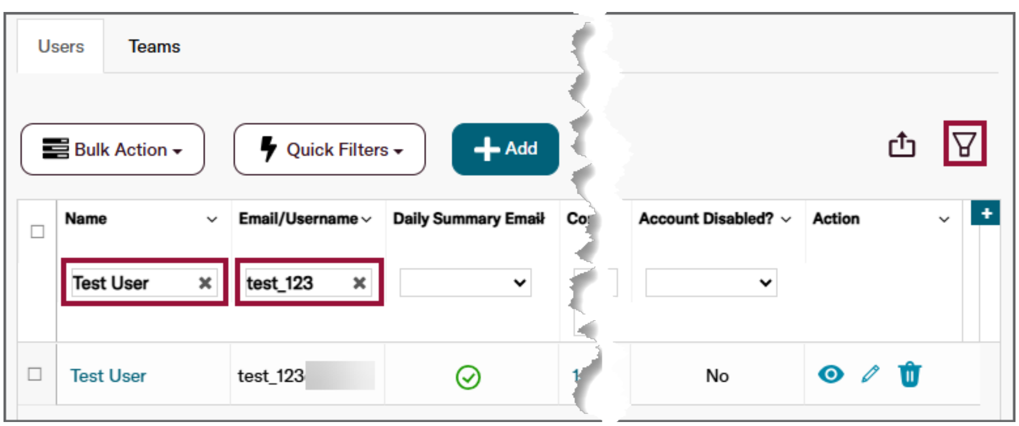


Disable a User

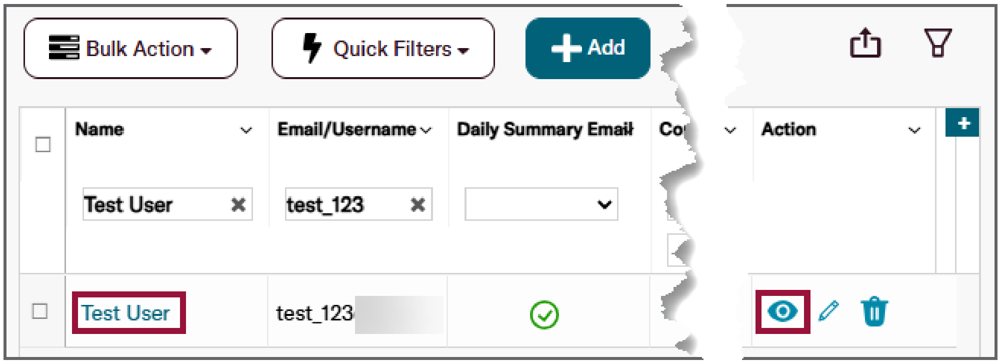
If a user is on extended leave or no longer works at the Company, the Company administrator may wish to **disable the user**.

IMPORTANT
A user cannot be disabled if they have pending approvals. Refer to the **Disable a User with Pending Approvals** section for information on how to reassign approvals in this situation.

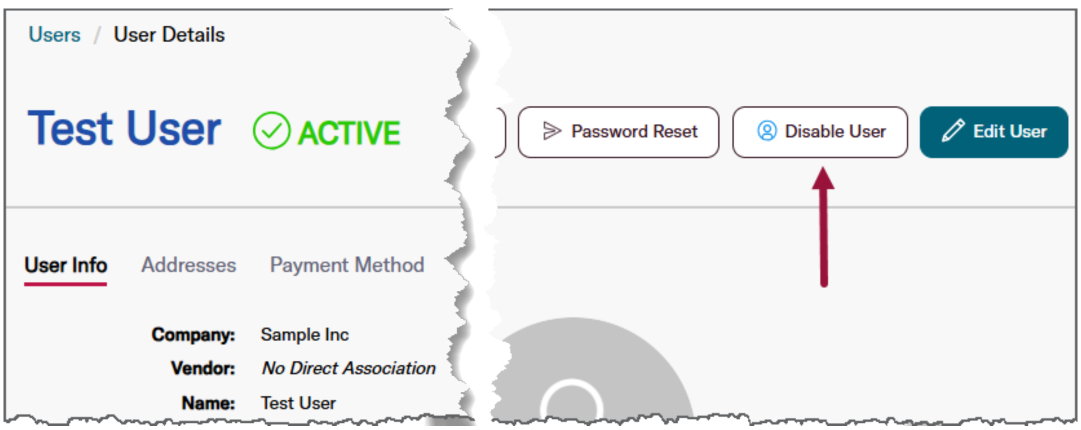
1. On the **Users** tab of the **Users** page, locate the desired user by utilizing the **filter fields**, such as **Name** or **Email/Username**.



2. Click the **Name** link or **View** icon to open the **User Details** page.

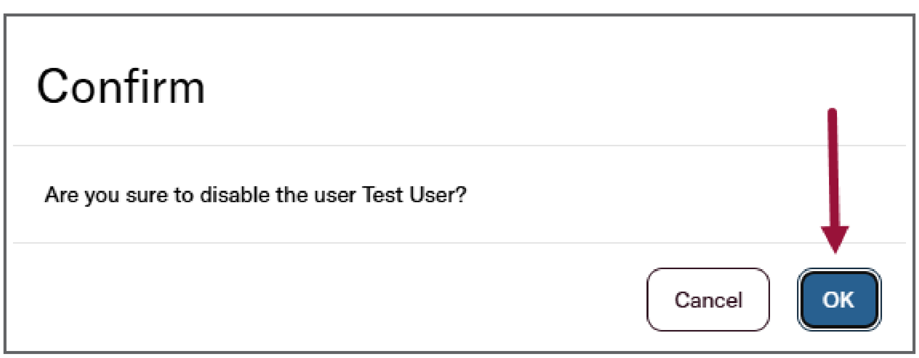


3. On the **User Details** page, click the **Disable User** button.

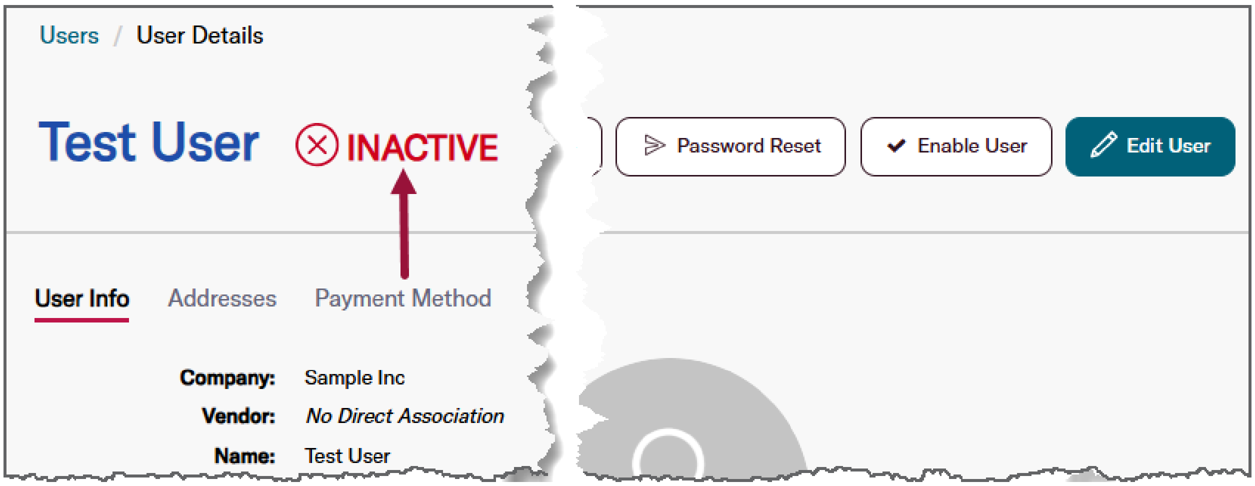


4. Click the **OK** button in the **Confirm** dialog.

- If a message displays indicating that the contact has **pending approvals and cannot be inactivated**, refer to the Disable a User with Pending Approvals section.



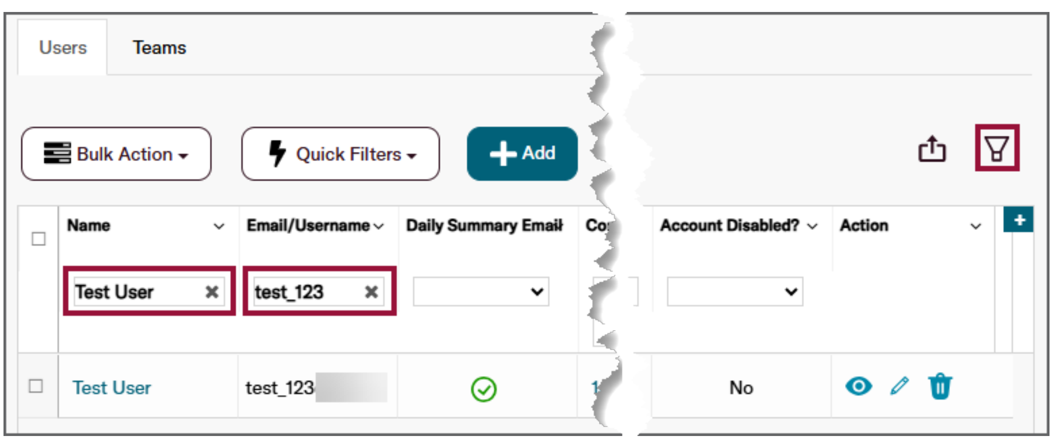
5. The **User disabled** dialog will display, and the user's status will change to **inactive**.



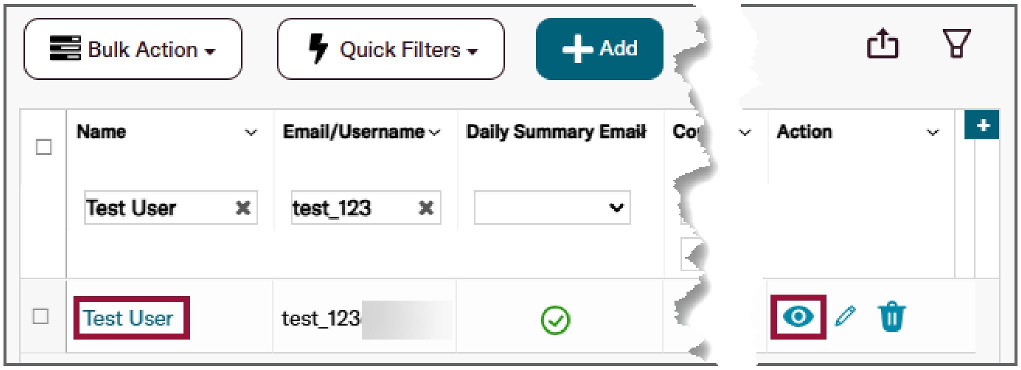
Enable a User

This section describes how to enable a previously disabled user.

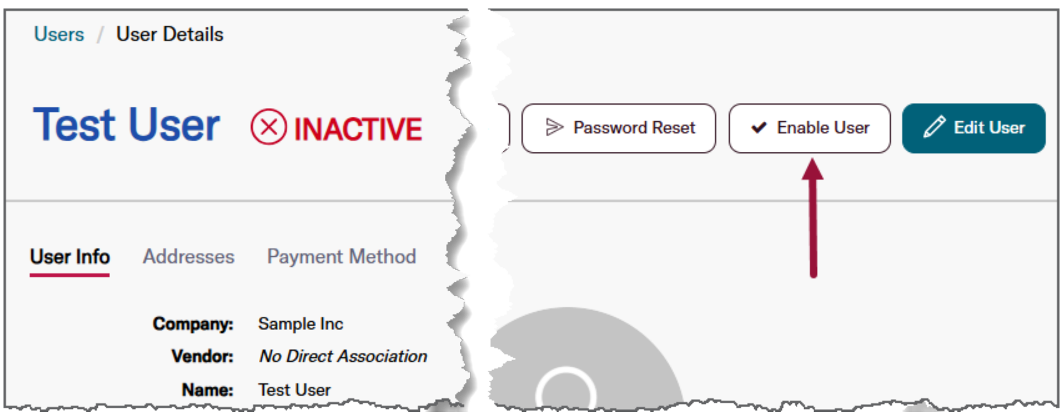
1. On the **Users** tab of the **Users** page, locate the desired user by utilizing the **filter fields**, such as **Name** or **Email/Username**.



2. Click the **Name** link or **View** 👁 icon to open the **User Details** page.



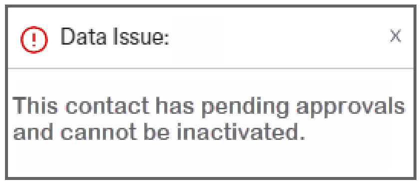
3. On the **User Details** page, click the **Enable User** button.



4. The **User enabled** dialog will display, and the user's status will change to **active**.

Disable a User with Pending Approvals

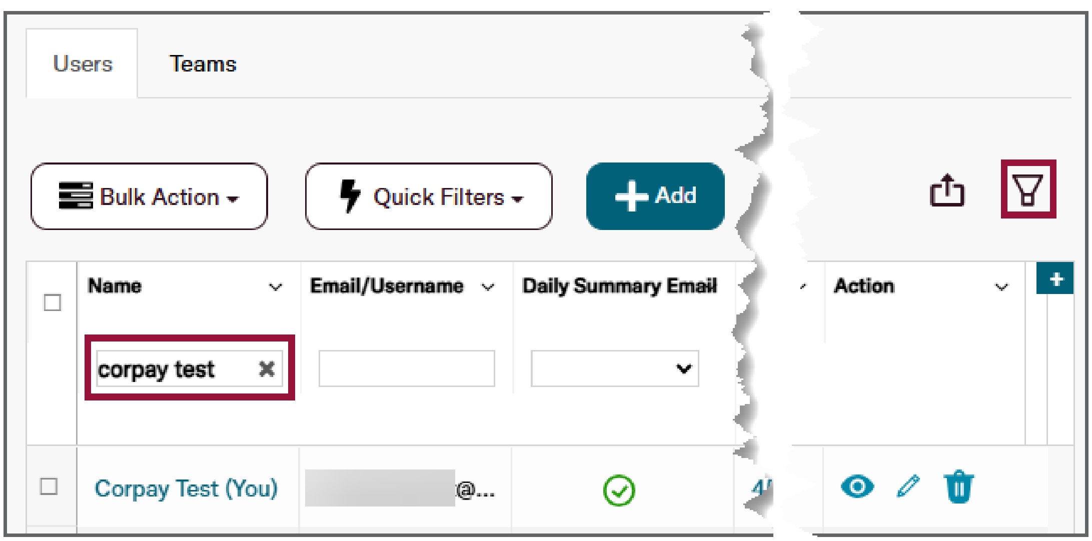
A user with pending approvals on an invoice, payment, expense, or purchase order cannot be disabled. If you attempt to disable a user who has pending approvals, the following error message will appear:



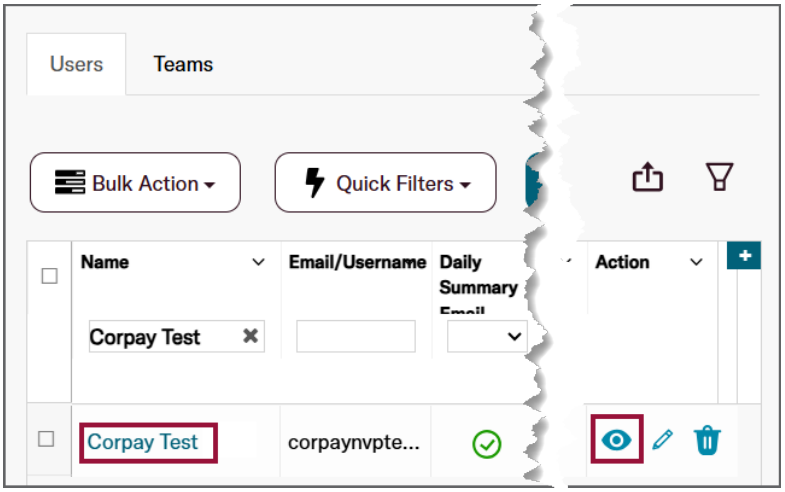
These users cannot be disabled until their **pending approvals are reassigned or deleted**. For instance, if the user is designated as an approver on an invoice, the invoice must be modified to reassign or delete the approval.

Complete the following steps to remove or reassign pending approvals from a user.

1. On the **Users** tab of the **Users** page, locate the desired user by utilizing the **filter fields**, such as **Name** or **Email/Username**.

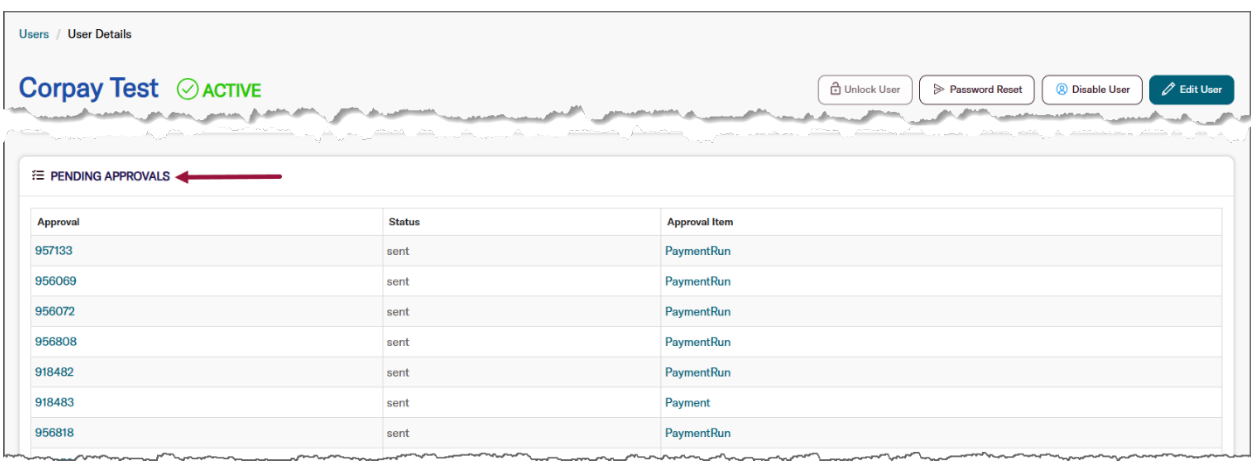


2. Click the **Name** link or **View** icon to open the **User Details** page.



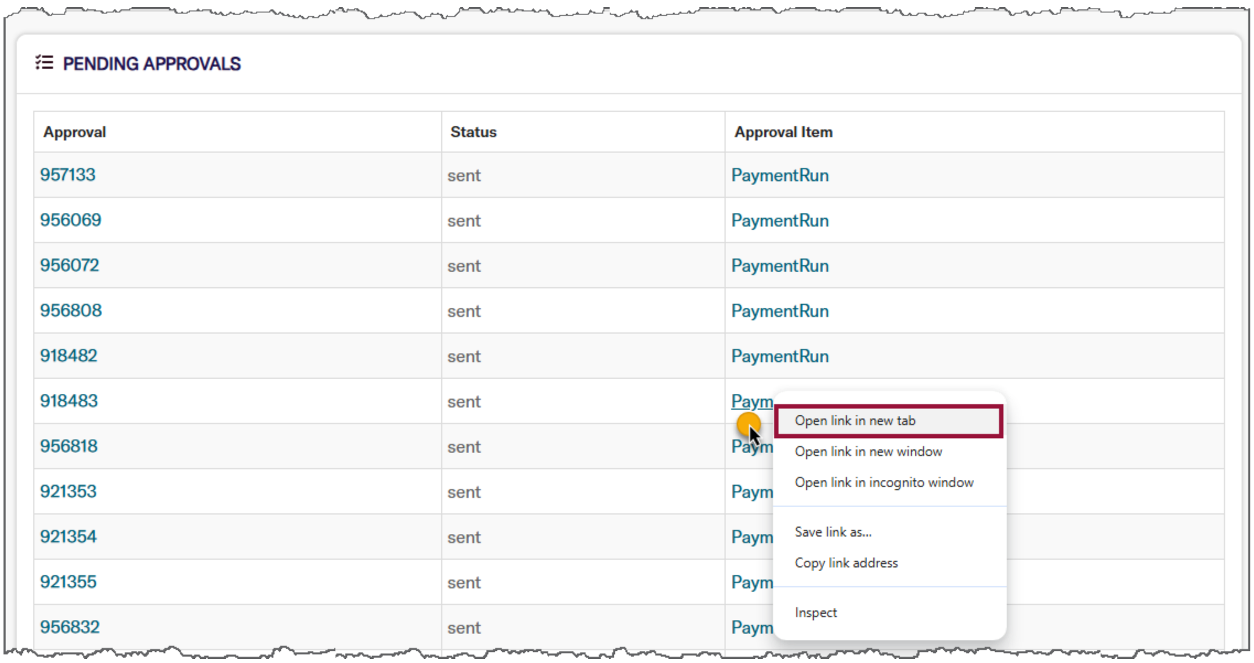
3. On the **User Details** page, scroll down to the **Pending Approvals** panel.

Note: The **Pending Approvals** panel will vary depending on the user's outstanding approvals and the status of those approvals.



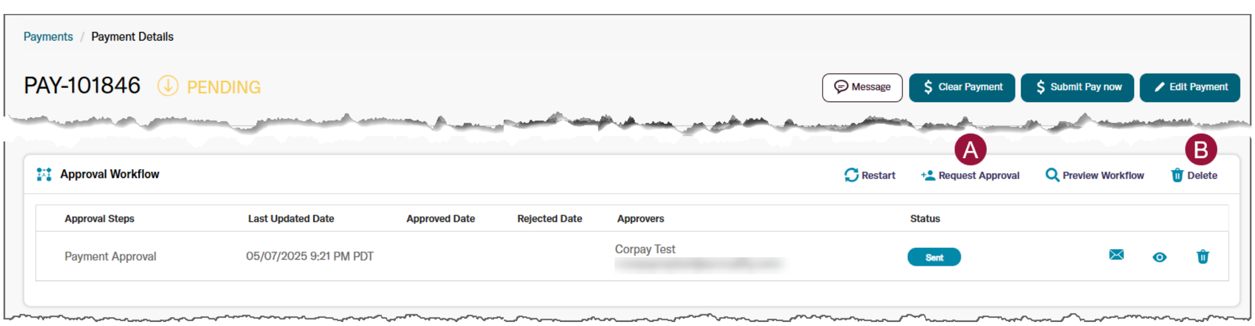
4. Right-click the **approval item** link under the **Approval Item** column and select **Open link in new tab** to open the **Item Details** page.

   Note: Opening the **Item Details** page in a new tab allows users to keep the **User Details** page open when they are prepared to [disable the user](#).



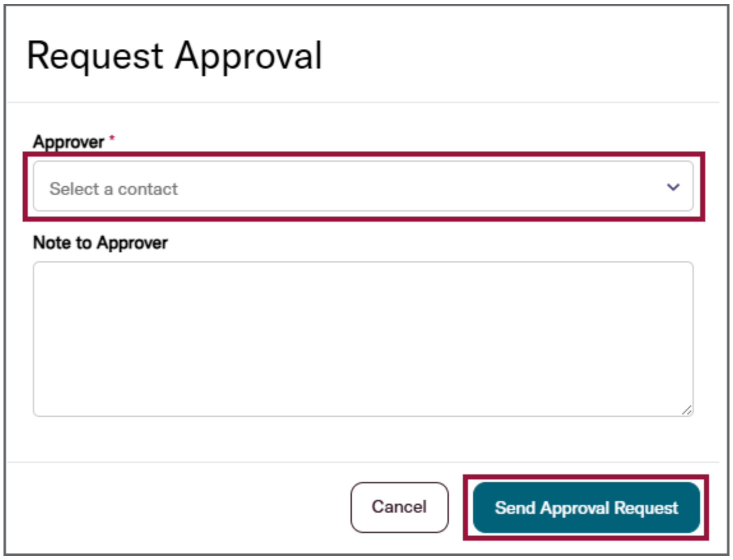
5. On the **Item Details** page, scroll down to the **Approval Workflow** section and choose one of the following options:

   Note: The following example shows the **Payment Run Details** page, but this will vary depending on the approval type.

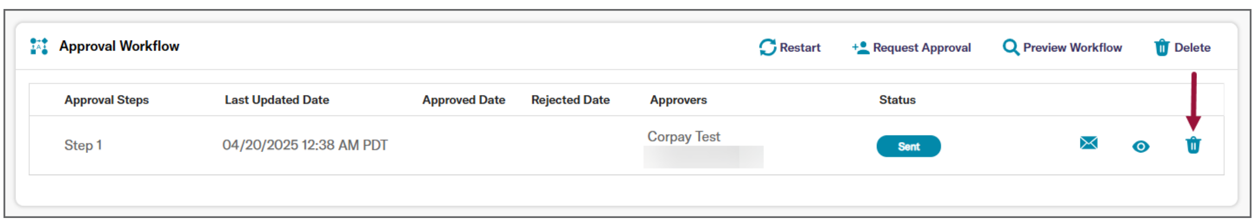


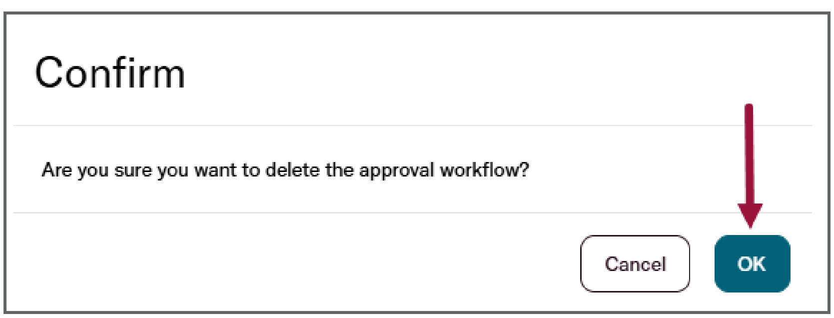
   A. **Request Approval** – Click the **Request Approval** button to reassign the approval to a new user.

- Key in the user's name or use the drop-down to locate and select the user. Then, click **Send Approval Request**.



B. **Delete** – Click the **Delete** button if a replacement approver is not required. Then, click **OK** in the **Confirm** dialog.





6. The pending approval will be reassigned or removed. Return to the **User Details** page and disable the user as detailed in the **Disable a User** section.

Add or Update Last 4 SSN and Birthday Information

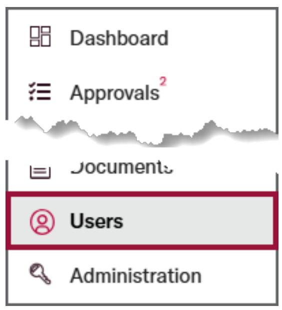
This section describes how to ensure that a user has a **birthday** or **last four digits of their social security number** (US-based users only) in their <u>**User Profile**</u>. It also includes information on ensuring that these fields are available on each **User Profile** page.

For security verification purposes, a user's **birthday** or **last four digits of their social security number** must be added to their **User Profile**. If the birthday or last four digits of the social security number are missing from the **User Profile**, **cardholders** cannot contact Corpay for help because their profile lacks enough information for security verification.

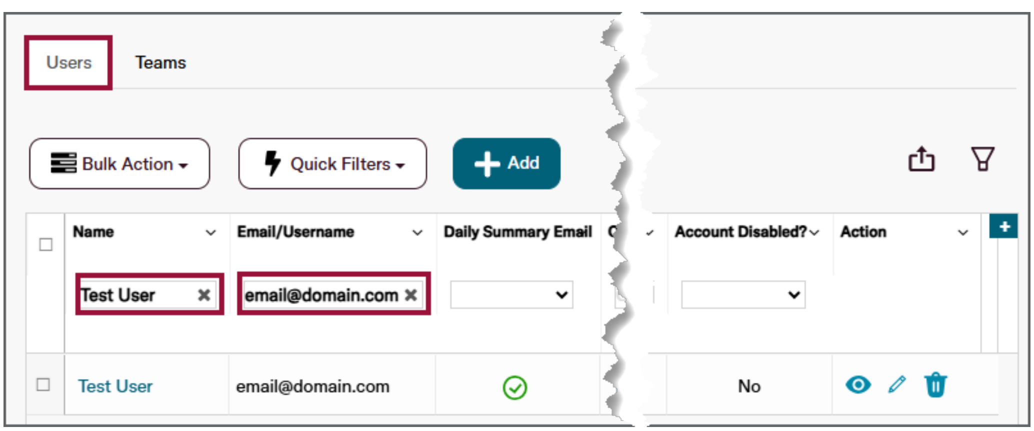
Add Last 4 SSN and Birthday Data

This section details how to add the **Last 4 SSN** and **Birthday** information to a user.

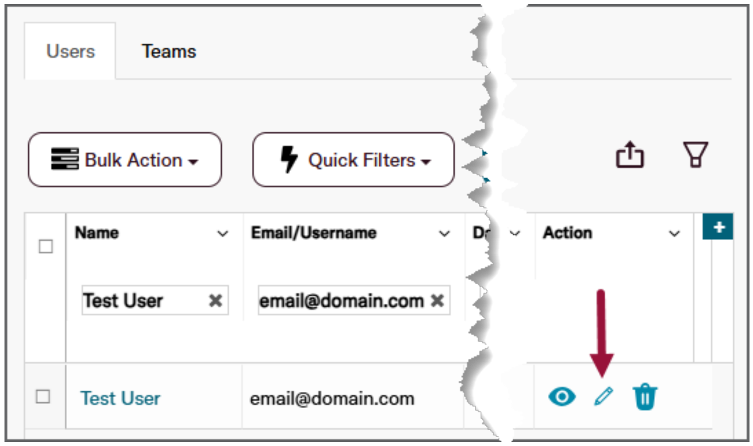
1. Click the **Users** module in the left-side navigation tab.



2. On the **Users** tab, use the <u>**filter fields**</u> to search for the user. Users can search using fields like **Name**, **Email/Username**, and **Contact Id**. Partial values are accepted in all text fields.

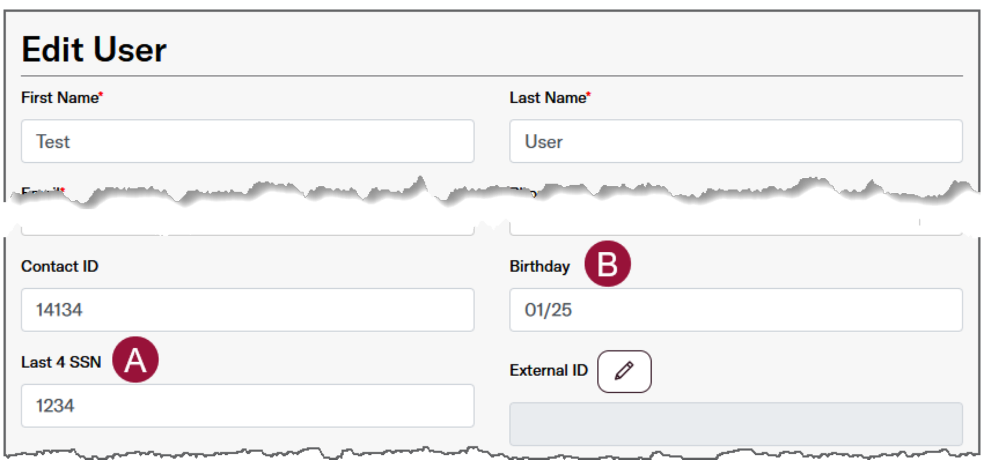


3. Click the **Edit** icon to open the **Edit User** page.



4. Complete the following fields on the **Edit User** page.

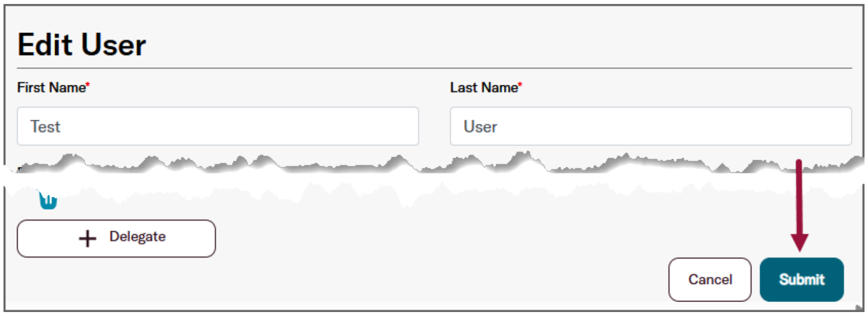
   Note: If these fields are not visible, refer to the instructions provided under the **Add the Last 4 SSN and Birthday Fields** section.



A. **Last 4 SSN –** Key in the **last four digits** of the **user's social security number**.

B. **Birthday –** Key in the user's **date of birth** in a **MM/DD format**. Do **not** enter the **year**.

5. Scroll to the bottom of the **Edit User** page and click the **Submit** button.



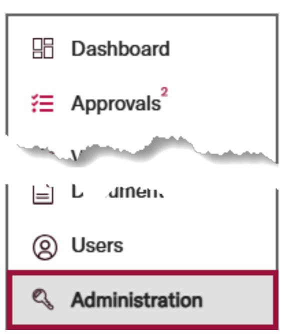
6. The **User Details** page will display and include the user's social security number and birthday.

Add the Last 4 SSN and Birthday Fields

If the **Birthday** and **Last 4 SSN** fields are missing in Corpay Complete, complete the following steps.

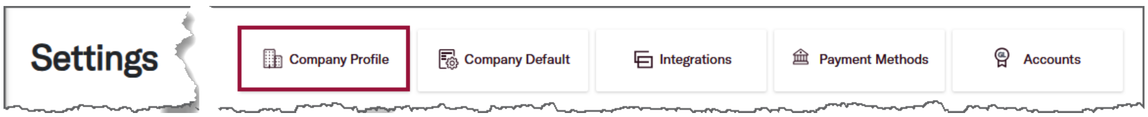
Note: These steps may only be completed by **administrators** who have access to the **Administration** module.

1. Click the **Administration** module in the left-side navigation pane.

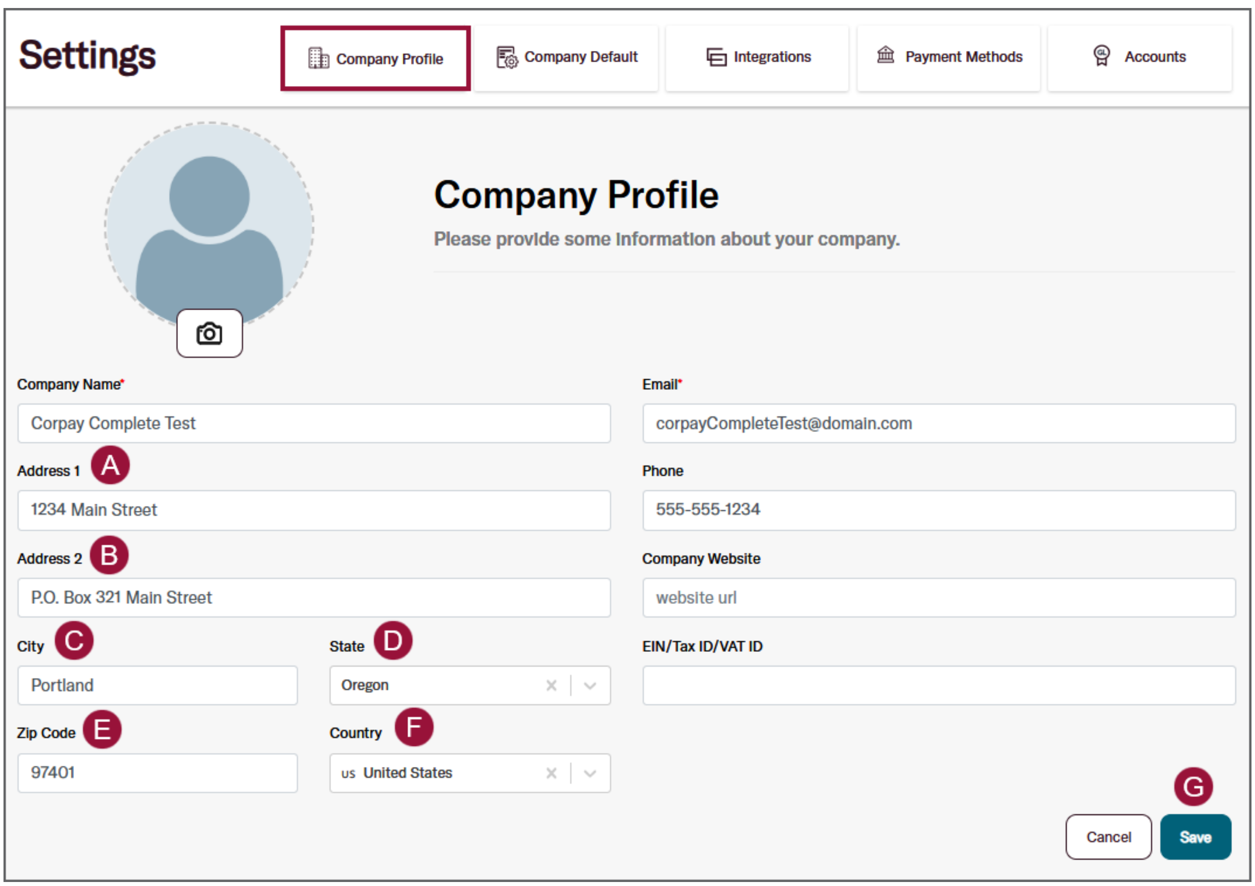


2. In the **Administration** module, click the **Settings** tab.

3. On the **Settings** page, click the **Company Profile** tile.



4. Complete the following steps on the **Company Profile** page.



A. **Address 1 –** Key in the **first line** of the Company address.

B. **Address 2 –** Key in the **second line** of the Company address if applicable.

C. **City –** Key in the **city** for the Company address.

D. **Zip Code –** Key in the **zip or postal code** for the Company address.

E. **Country –** Click the **Country** drop-down and select the **country** for the Company address.

F. Click the **Save** button.

5. The **Birthday** and **Last 4 SSN** fields will now be available on the **User Details** page. Return to the **Add Last 4 SSN and Birthday Data** section to add information to the **Birthday** and **Last 4 SSN** fields.

Reset Password/MFA and Unlock Accounts

One common task that requires administrator support is resetting a user's password, MFA/Okta, or unlocking their account.

IMPORTANT
SSO authentication issues must be handled by the **Company's IT team**.

Company administrators can address the following login issues:

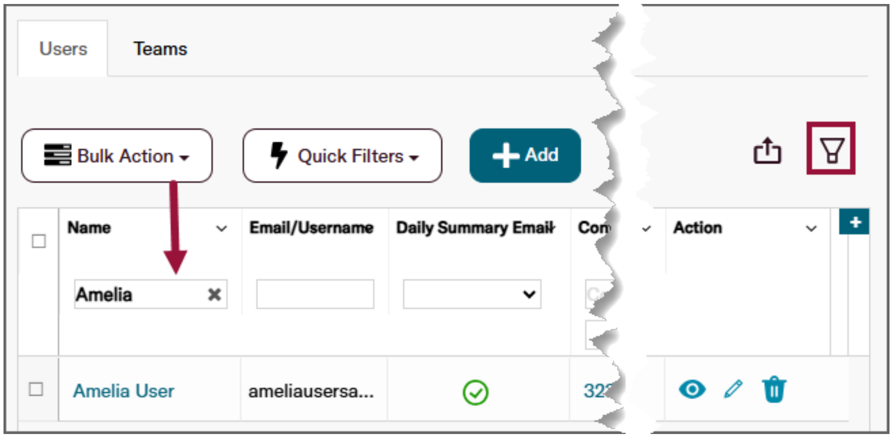
- The user received a new phone and requires an MFA reset.
- The user forgot their password.
- The user's account has been locked after too many login attempts.

Note: The user's name is required to assist with these requests.

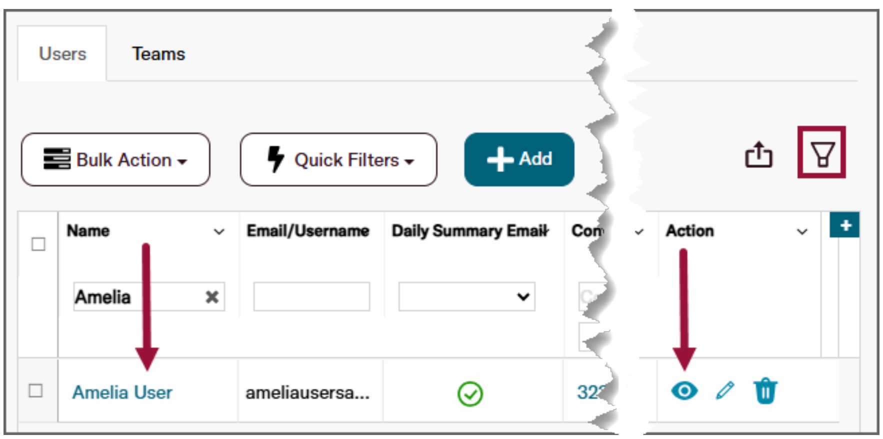
Reset Password without MFA

If a user indicates that they forgot their password and need a password reset, complete the following steps:

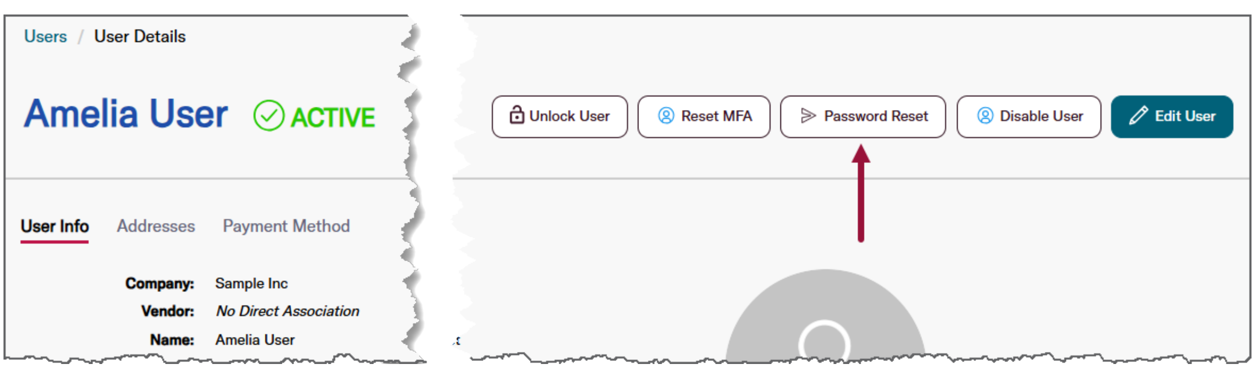
1. On the **Users** tab of the **Users** page, locate the desired user by utilizing the **filter fields**, such as **Name** or **Email/Username**.



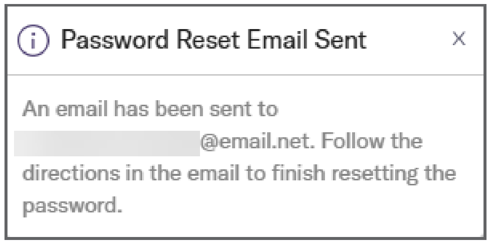
2. Click the **Name** link or **View** icon to open the **User Details** page.



3. On the **User Details** page, click the **Password Reset** button.



4. The **Password Reset Email Sent** dialog will display, and the user will receive an email with instructions on how to reset their password.

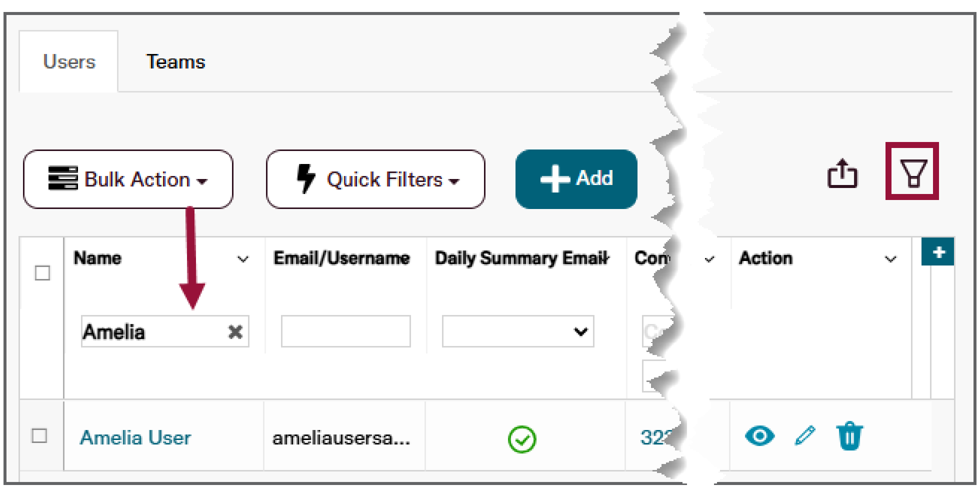


5. If the user cannot access Corpay Complete after resetting their password, contact the **Corpay Complete Support Team** at **techsupport@corpay.com**.

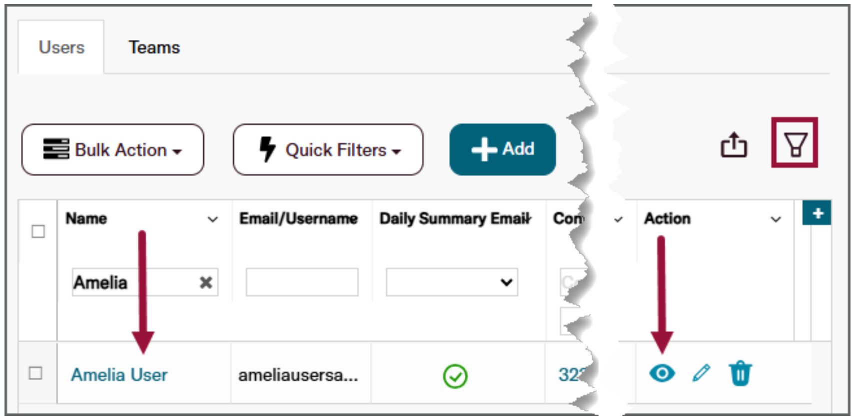
Reset MFA

If a user is experiencing MFA issues or has a new device linked to their MFA, complete the following steps:

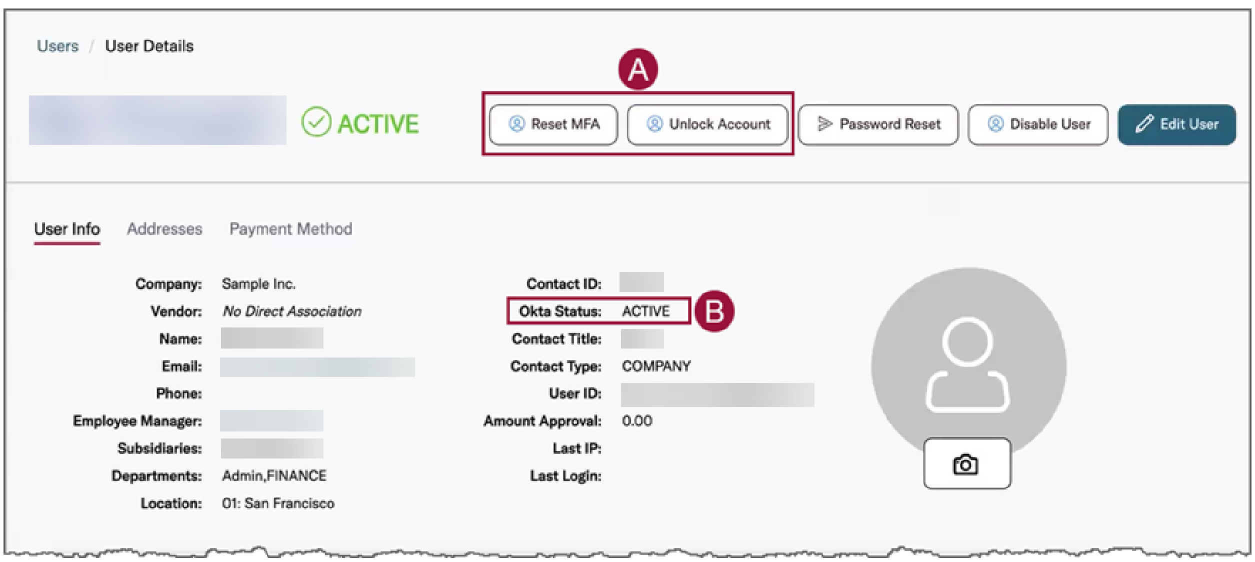
1. On the **Users** tab of the **Users** page, locate the desired user by utilizing the **filter fields**, such as **Name** or **Email/Username**.



2. Click the **Name** link or **View** icon to open the **User Details** page.



3. Observe the following information on the **User Details** page:



A. **Reset MFA and Unlock Account** – If these two options are available, the user is set up for MFA login.

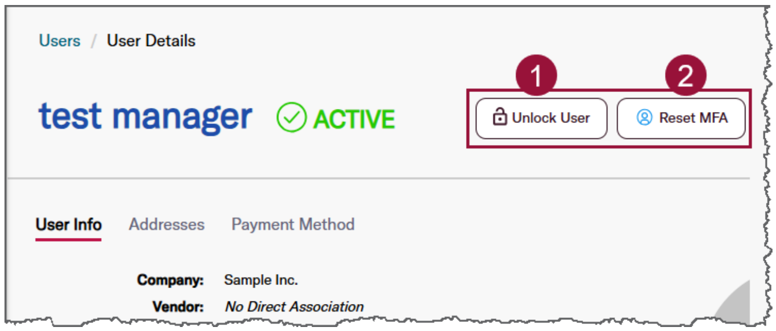
   - If the **Reset MFA** and **Unlock Account** options are not visible, reset their password as described in the **Reset Password without MFA** section.

B. **Okta Status** – This field will either say **ACTIVE** or **LOCKED OUT.**

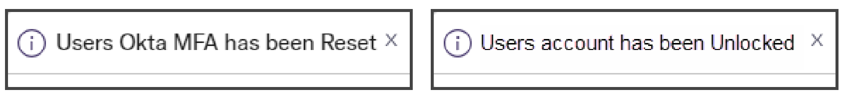
   - If the user is experiencing login issues, the MFA can be reset regardless of the Okta status.

7. Click the **Unlock User** button. Then, if necessary, click the **Reset MFA** button.

   Note: If the user indicates that their MFA is working but they are locked out, click **Unlock User**. If issues persist after unlocking, click **Reset MFA**.



8. A confirmation dialog will display for both actions.

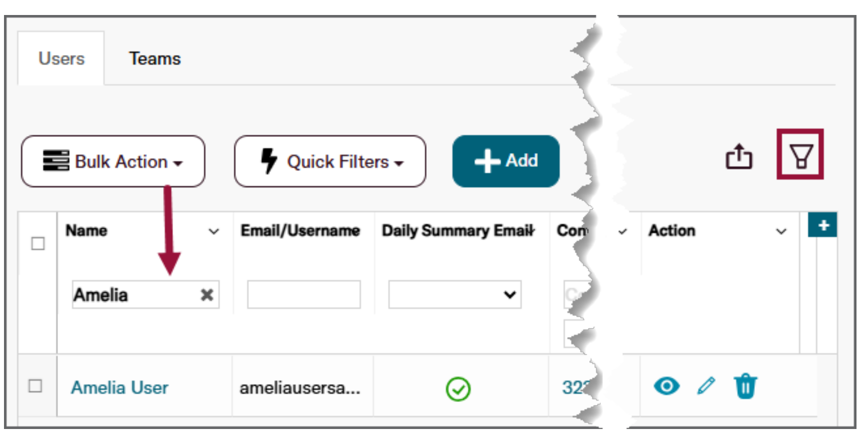


9. If the user is still experiencing MFA issues, contact the **Corpay Complete Support Team** at **techsupport@corpay.com**.

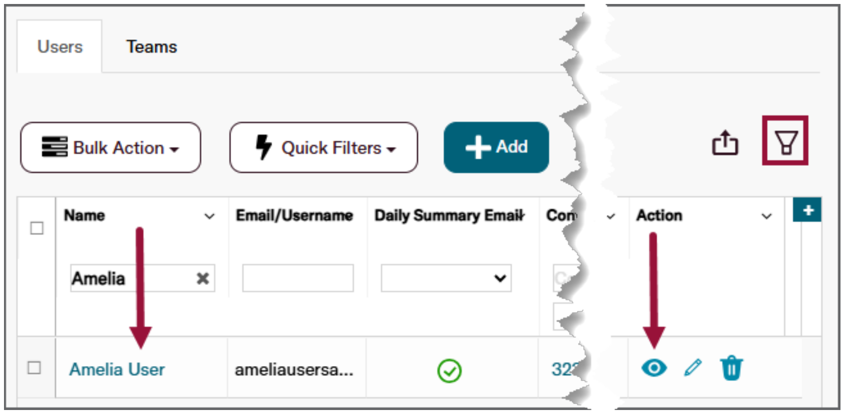
Unlock an Account

If a user has too many failed login attempts, their account will automatically lock, and it must be unlocked by a Company administrator or a Corpay associate. Complete the following steps to unlock a user's account.

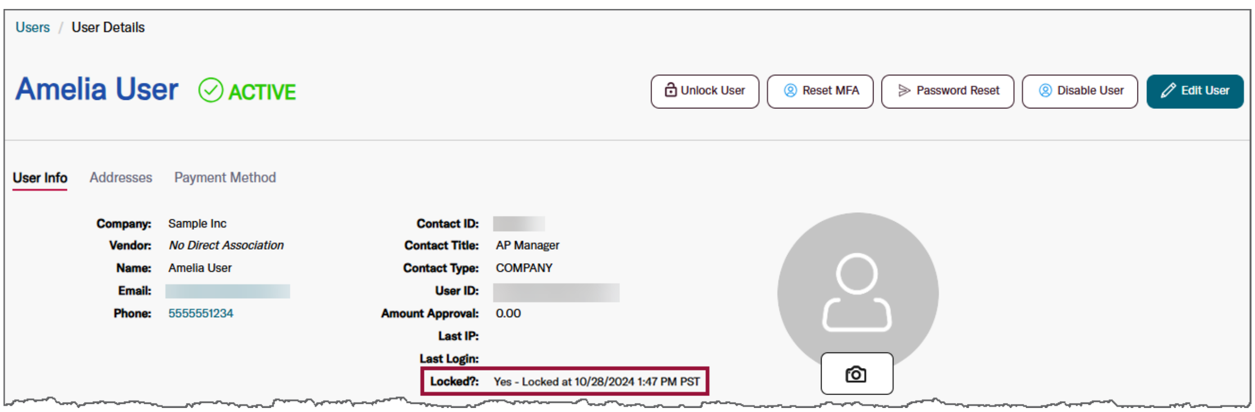
1. On the **Users** tab of the **Users** page, locate the desired user by utilizing the **filter fields**, such as **Name** or **Email/Username**.



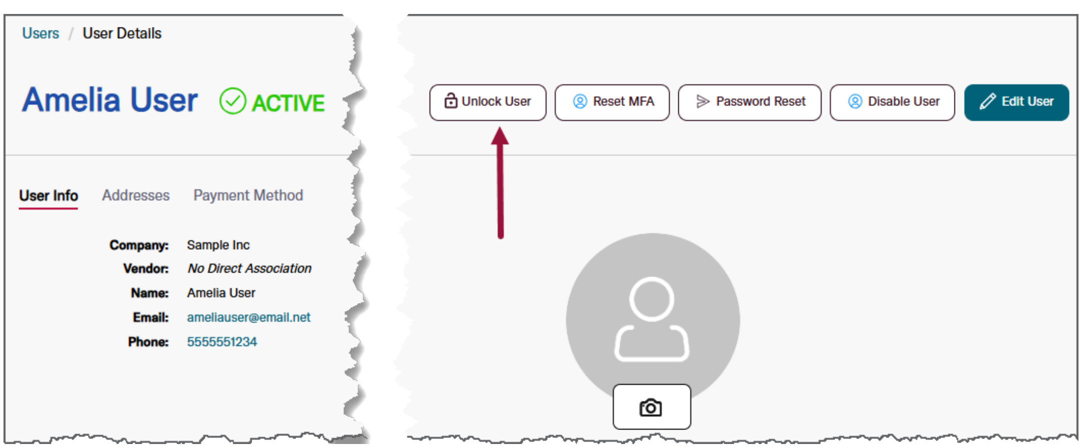
2. Click the **Name** link or **View** icon to open the **User Details** page.



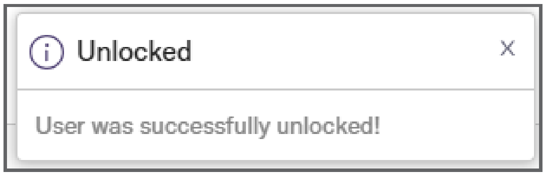
3. On the **User Details** page, observe the **Locked?** field, which indicates the time and date when the user was locked out of their account.



4. Click the **Unlock User** button.



5. The **Unlocked** dialog will display, and the user's account will be unlocked.



6. If the user continues to experience issues, contact the **Corpay Complete Support Team** at **techsupport@corpay.com**.

User Roles and Permissions

Corpay Complete enables users to have a series of unique permission sets and roles that grant or limit access on the Corpay Complete platform. The roles that a user will need will vary significantly by Company, role, and product.

Corpay Complete operates under three main roles: **staff**, **manager**, and **administrator**.

- **Staff** – Users with **staff** roles can only see and engage with objects that are assigned to them.

- **Manager** – Users with **manager** roles can see and engage with the objects that are assigned to them. Additionally, they can edit and view all activities associated with users who list the manager on their **User Profile**.

  - If they are assigned as a staff user's manager, manager users will have access to approve and monitor the activity of the staff user.

  - Manager permissions also give users the ability to see a complete list or dashboard of items such as payments or purchase orders, but it does not allow them to edit those items unless specified.

- **Administrator** – Users with **administrator** roles can see, edit, and update all objects within their platform. Administrator users should be designated for those who oversee departmental operations or plan to serve as the System Administrator for a Company.

Users are typically assigned multiple roles. This approach ensures that users can perform their job functions while restricting their access to modules and functions unrelated to their positions.

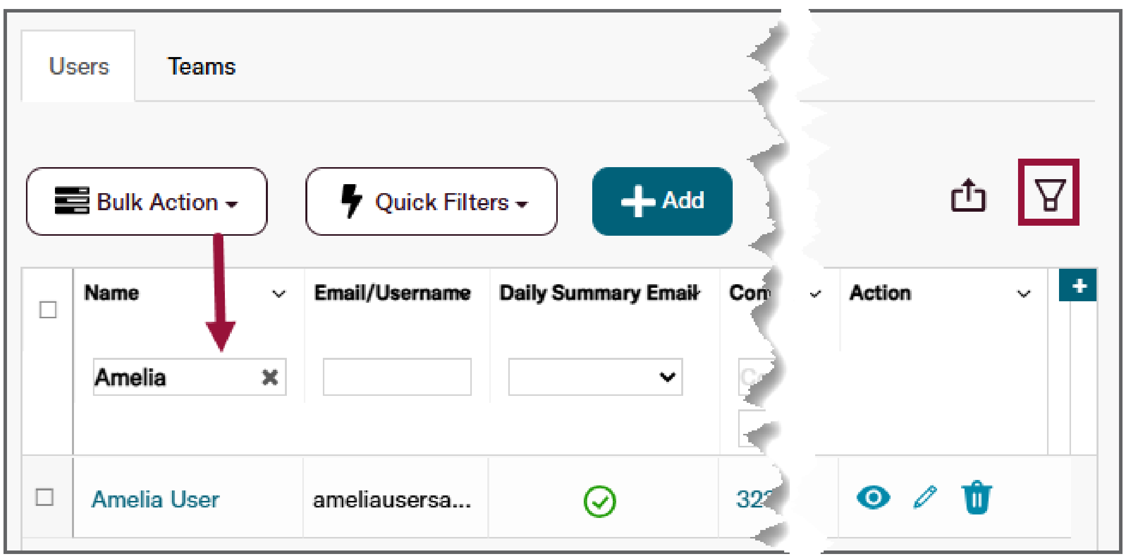
The following example shows a staff user with additional permission to approve invoices and view payment and purchase order pages.

For additional information about roles and permissions in Corpay Complete, refer to the **Corpay Complete Roles and Permissions** article in the **Corpay Complete Knowledge Base**.

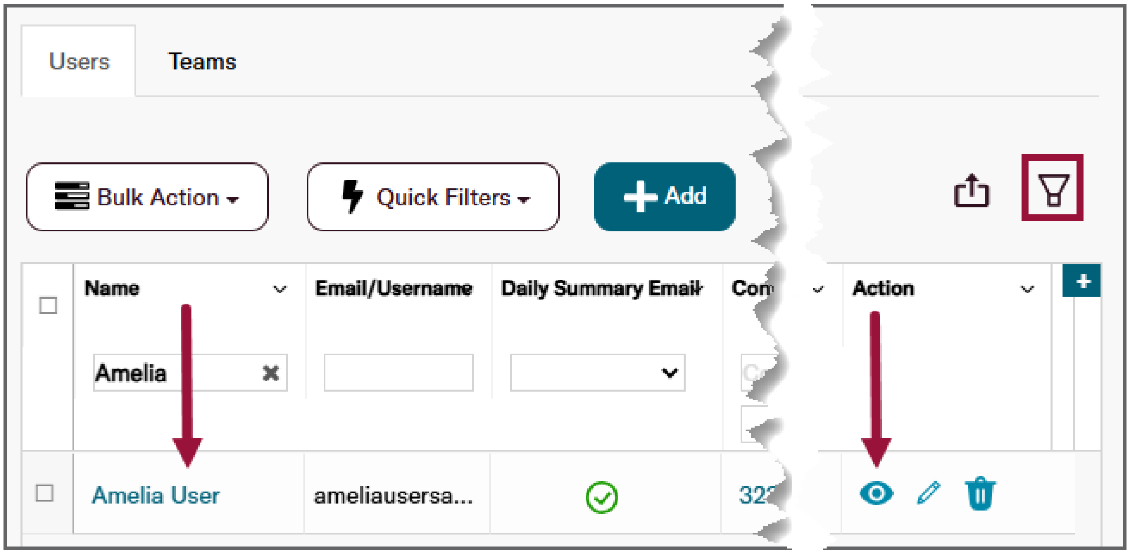
Update User Roles and Permissions

This section describes how to update a user's roles and permissions.

1. On the **Users** tab of the **Users** page, locate the desired user by utilizing the **filter fields**, such as **Name** or **Email/Username**.

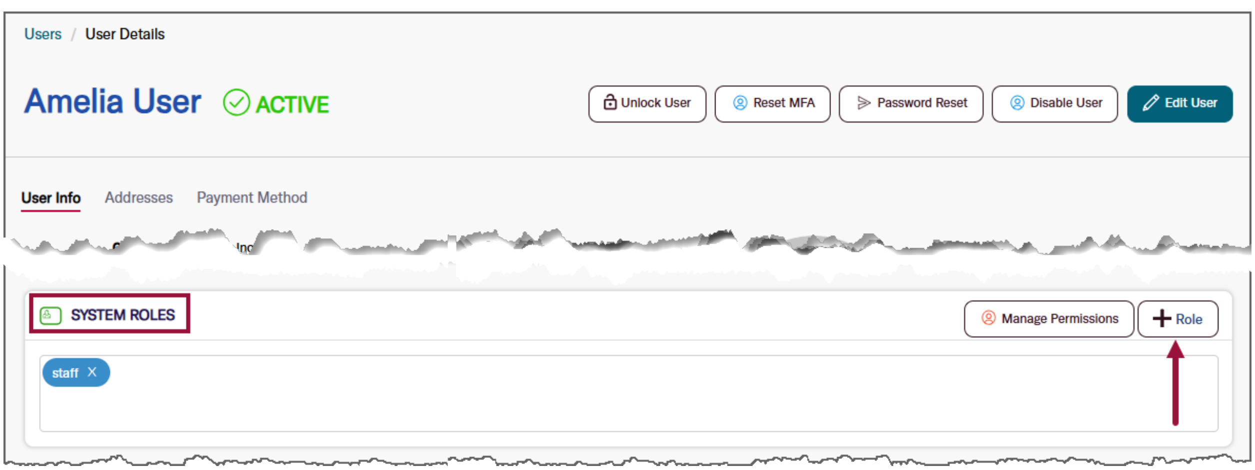


2. Click the **Name** link or **View** icon to open the **User Details** page.



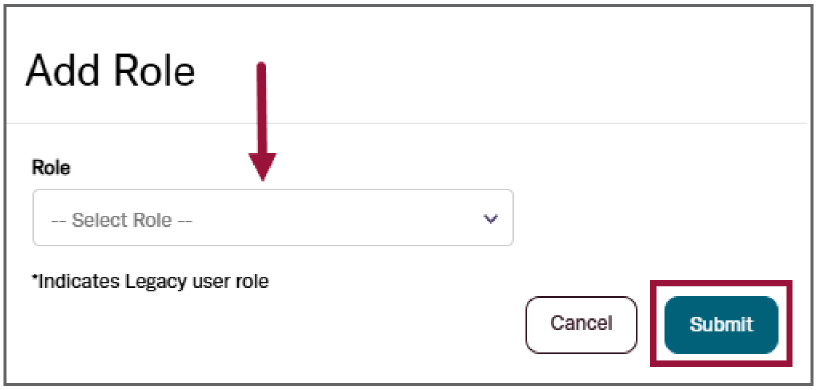
3. On the **User Details** page, scroll down to the **System Roles** panel and click the **+ Role** button.

Note: Staff is the default role assigned to users when they are first activated.

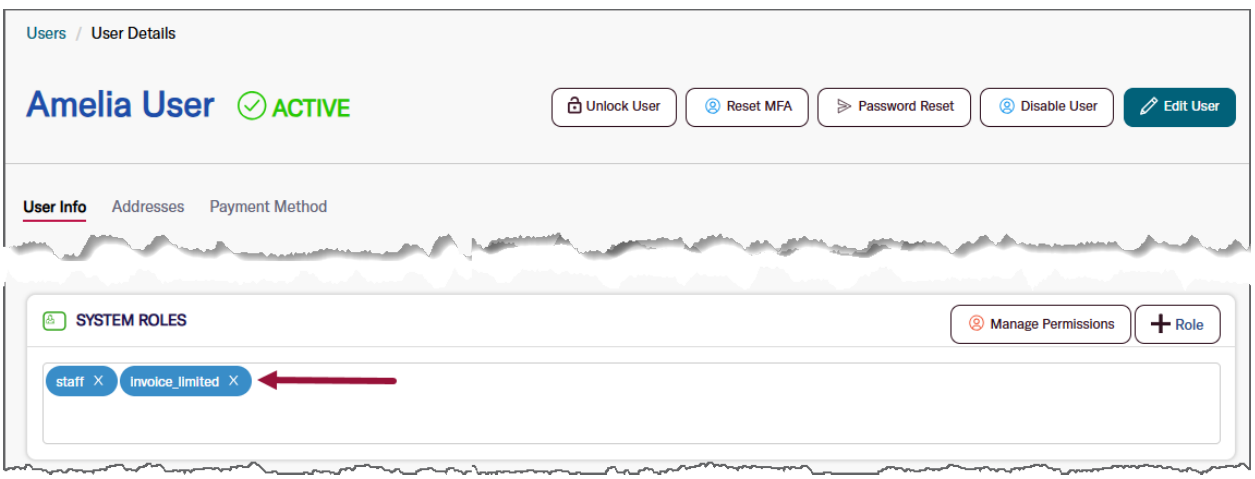


4. In the **Add Role** dialog, either type to search for a role in the **Role** drop-down or click the **Role** drop-down and select a role.

   Note: Refer to the Corpay Complete Roles and Permissions article in the Corpay Complete Knowledge Base for a complete list of roles and their responsibilities.



5. The new role will display in the **System Roles** panel.



6. Repeat **step 4** above to add additional roles to the user.

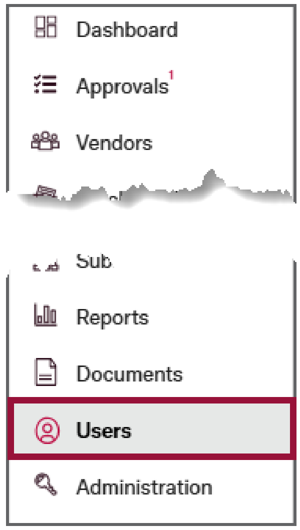
Create or Update a Team

In Corpay Complete, users can be grouped to form a **team**. The team can then be assigned specific workflows, and either an individual member or the entire team can serve as an approver.

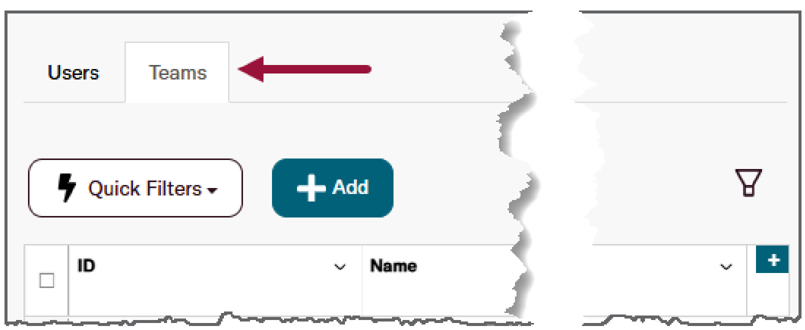
Create a Team

This section describes how to create a new team.

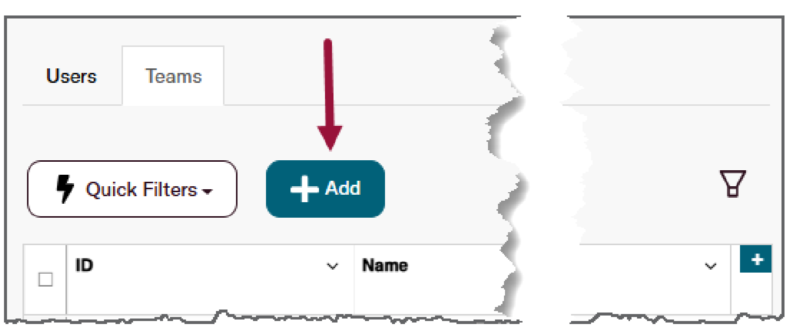
1. Click the **Users** module in the left-side navigation pane.



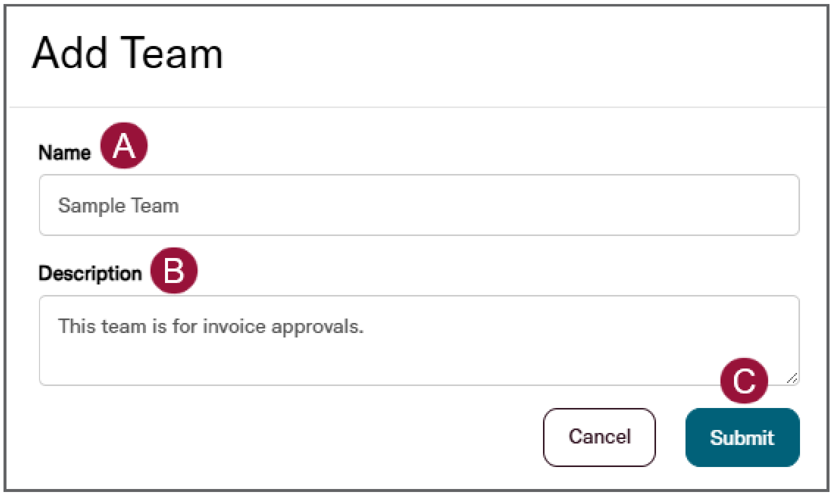
2. In the **Users** module, click the **Teams** tab.



3. On the **Teams** tab, click the **+ Add** button.



4. Complete the following steps on the **Add Team** dialog:

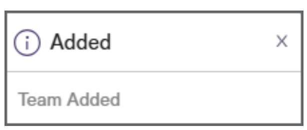


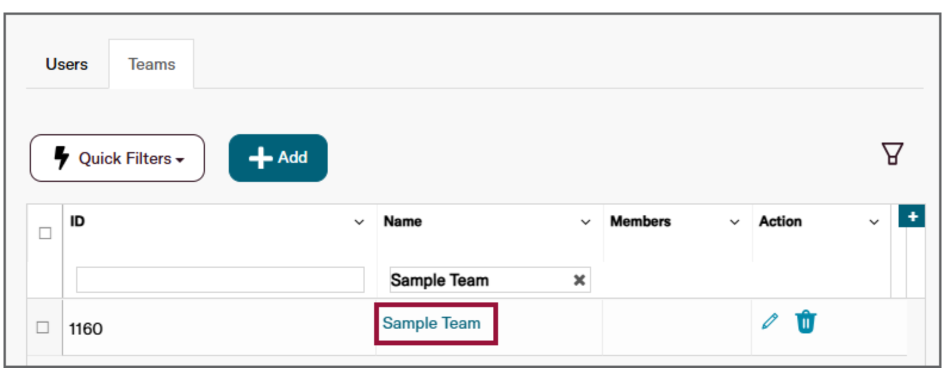
A. **Team** – Key in the **team's name**.

B. **Description** – Key in an optional **description** of the team.

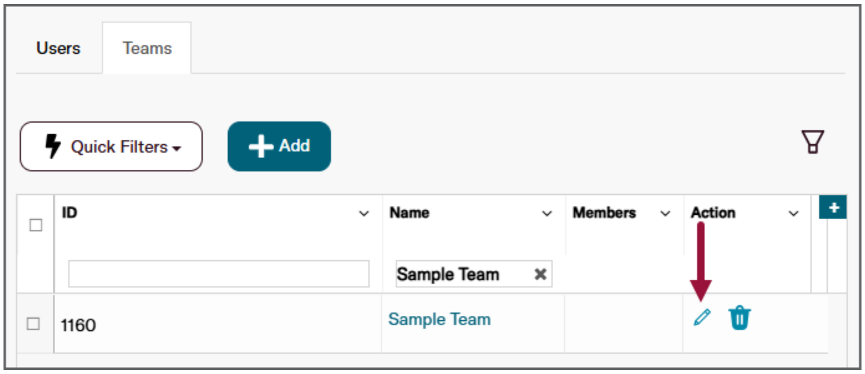
C. Click the **Submit** button.

5. The **Added** dialog will display, and the new team will display in the **Teams** grid.

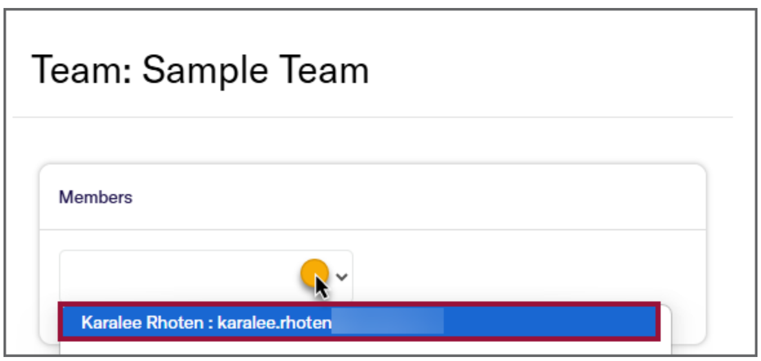




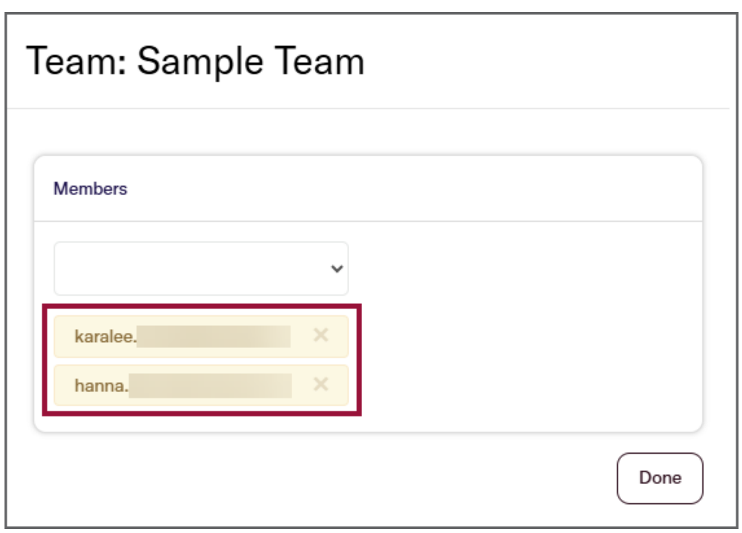
6. Click the **Edit** icon in the **Action** column.



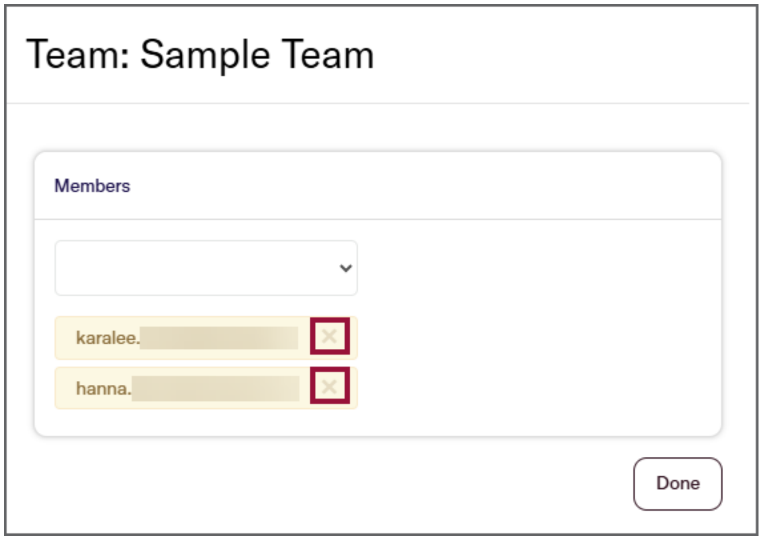
7. In the **Team: [Team Name]** dialog, type to search in the **Members** drop-down or use the drop-down to find the user to add. Repeat this process for each user to be added to the team.



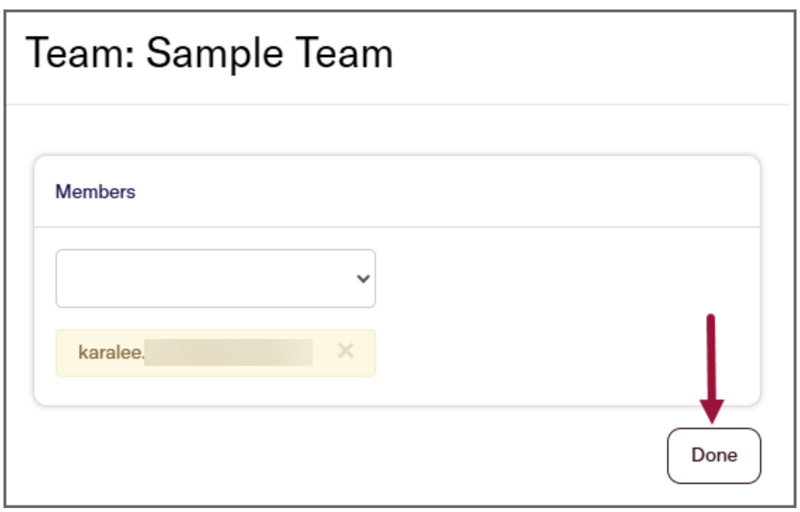
8. The users will display in the **Team: [Team Name]** dialog.



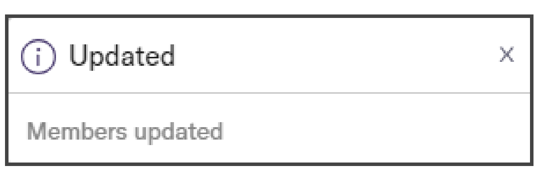
9. To **remove a user** from a team, click the **X** icon to the right of their name and email address.



10. Click the **Done** button to save changes to the team.



11. The **Updated** dialog will display.

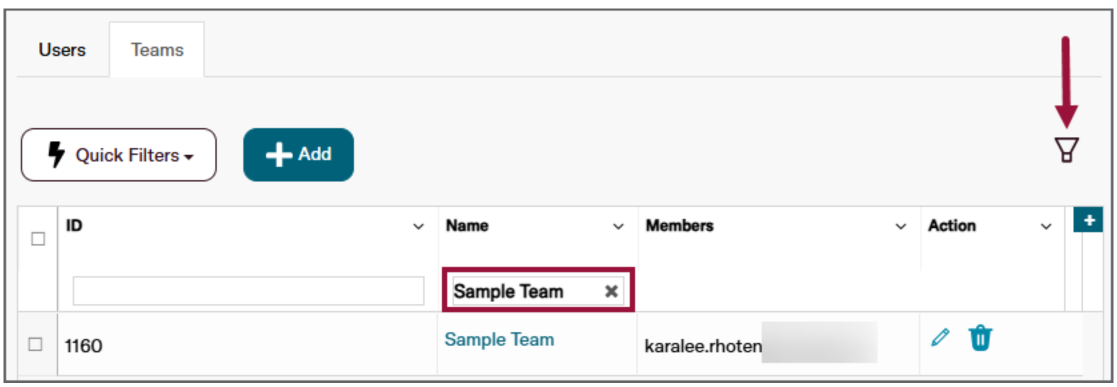


Update a Team

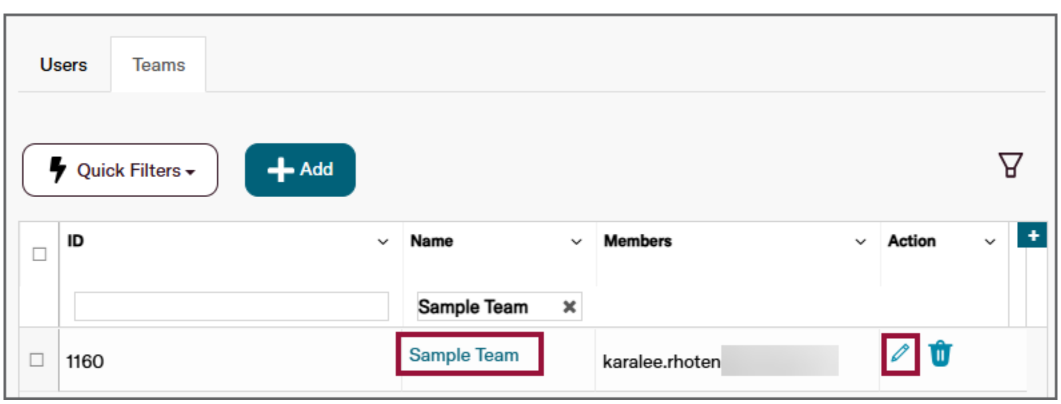
This section describes how to update an existing team.

1. In the **Users** module, click the **Teams** tab.

2. Click the **Toggle Filter** icon to display the **filter fields**, then **search for the team** in the **Teams** grid. Users can search for a team by **ID** or **Name**.

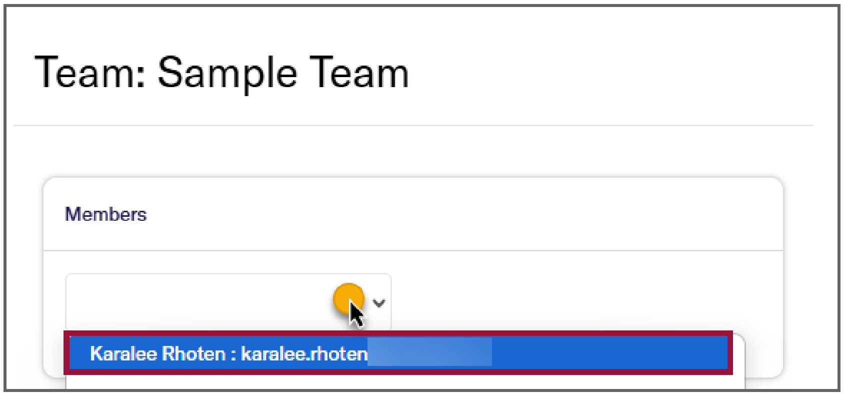


3. Click the **Name** link or **Edit** icon in the **Action** column.

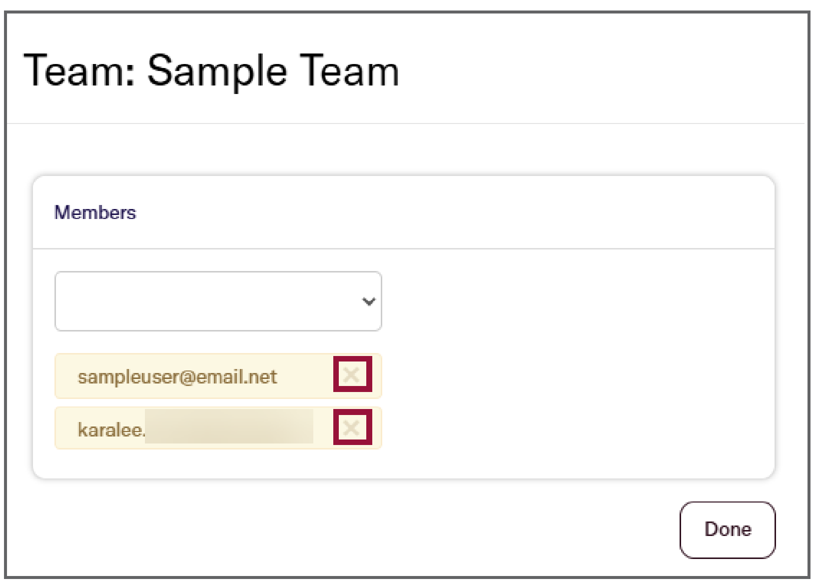


4. On the **Team: [Team Name]** dialog, choose one of the following options:

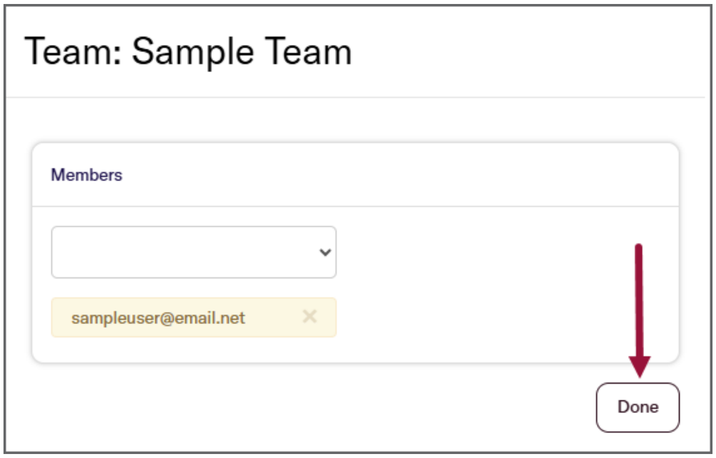
   A. Type to search in the **Members** drop-down or use the drop-down to find a user to add. Repeat this process for each user to be added to the team.



   B. To **remove a user** from a team, click the **X** icon to the right of their name and email address.



5. Click the **Done** button to finish editing the team.



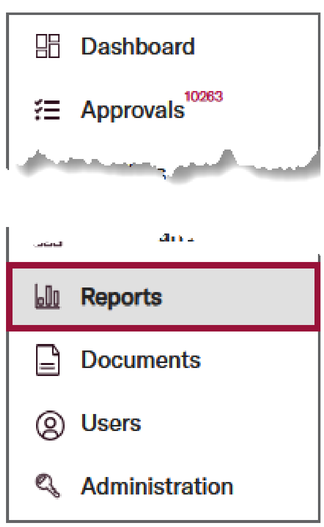
Reports Module for Users

Reports in Corpay Complete provide detailed information on all modules that can assist administrators in various tasks. Users can produce either standard reports or customized reports.

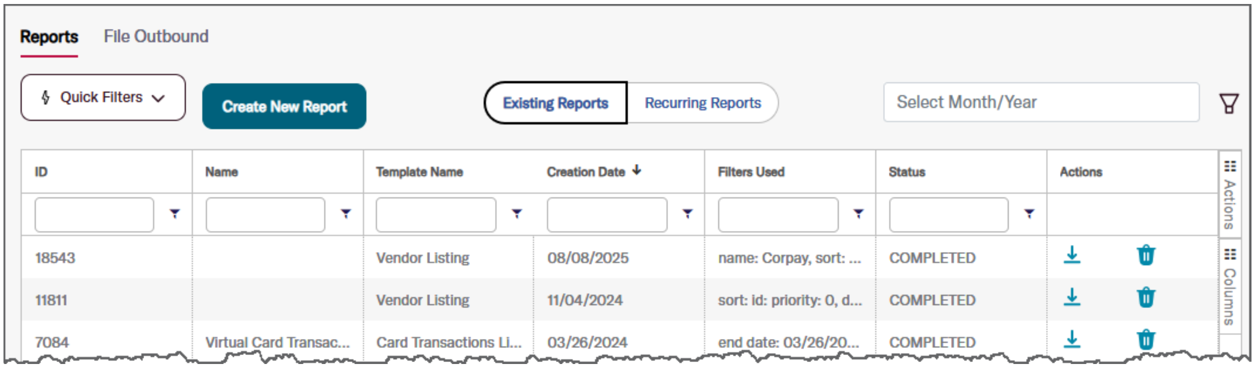
Note: Reports are **per user** instance. A report pulled by one user will not carry over to other users.

Access the Reports Module

1. To access the **Reports** module, click the **Reports** module in the left-side navigation pane.

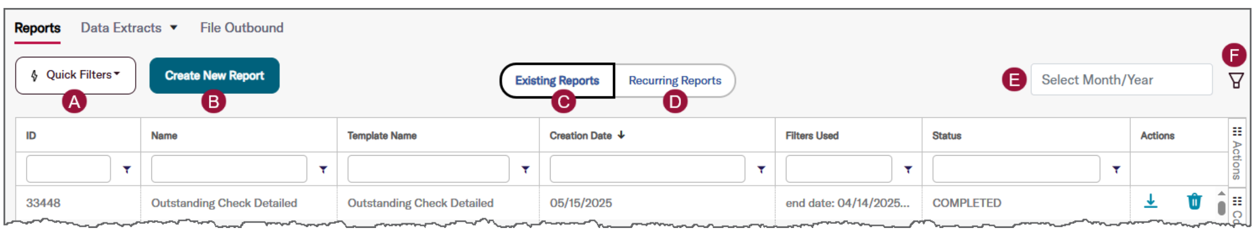


2. The **Reports** module will display.



Reports Tab

The **Reports** tab is where users can create, locate, and download existing and recurring reports.



A. **Quick Filters** – Click this drop-down to **clear all filters** from the **Existing Reports** grid or **reset the grid** to its default state.

B. **Create New Report** – Click this button to **create or run a new report**.

C. **Existing Reports** – If the **Recurring Reports** tab has been opened, click this button to return to the **Existing Reports** tab, where users can **view and download** previously run reports.

D. **Recurring Reports** – Click this button to open the **Recurring Reports** tab or to **schedule a recurring report**.

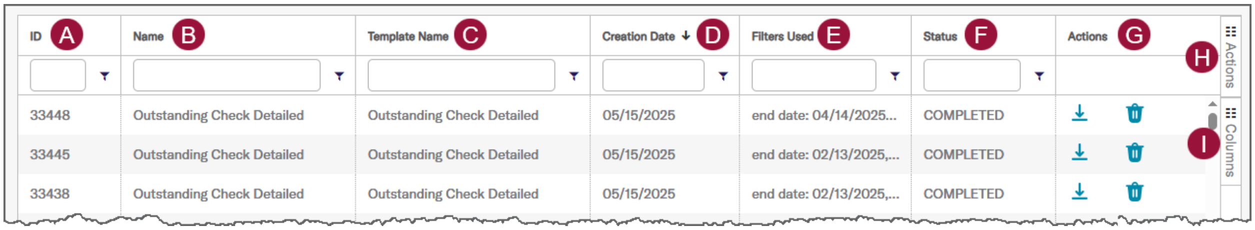
E. **Date Filter** – Click the **Date Filter** and select a month and year to **filter reports** in the **Existing Reports** grid by the specified date.

F. **Toggle Filter** – Click the **Toggle Filter** icon to show or hide the **filter fields** in the **Existing Reports** grid.

Existing Reports Grid

The **Existing Reports** grid contains all one-time reports created by a user.

Note: Visible columns depend on selections made using the **Columns** button.



A. **ID** – This column displays the **ID number** of the report.

B. **Name** – This column displays the **name** of the report.

C. **Template Name** – This column displays the **name of the template** used to generate the report.

D. **Creation Date** – This column displays the **date the report** was created.

E. **Filters Used** – This column displays the **filters** used when generating the report such as **Vendor Master ID** or **Contact Type**.

F. **Status** – This column displays the **status** of the report:

  - **Pending / Running** – The report is in the process of **generating**.
  - **Completed** – The report is complete and **ready for download**.

G. **Actions** – This column displays the following **Actions** for the report:

  - **Download** – Click the **Download** icon to **download** the report.
  - **Delete** – Click the **Delete** icon to **delete** the report.

H. **Actions (button)** – The **Actions** button displays the **Actions** flyout, where users can select from the following options:

  - **Clear all filters** – Click the **Clear all filters** option to remove all filters from the **Existing Reports** grid.
  - **Export selected data as csv** – This option **exports selected data** in the **Existing Reports** grid to a downloadable CSV file.
  - **Export all data as csv** – This option **exports all data** in the **Existing Reports** grid to a downloadable CSV file. The CSV file will include both visible and hidden columns.

- **Export visible data as csv** – This option **exports visible data** in the **Existing Reports** grid to a downloadable CSV file. Hidden columns will not be included in the CSV file.

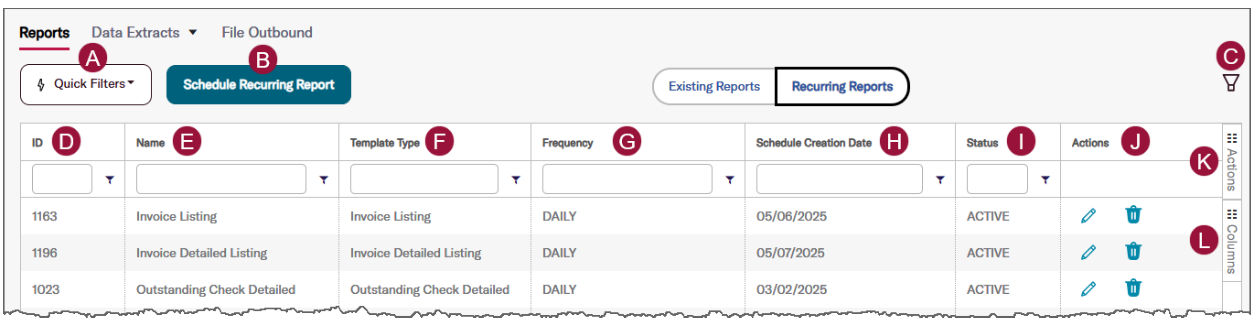
- **Export to Excel:** This option **exports all data** in the **Existing Reports** grid to a downloadable Excel file.

I. **Columns (button)** – Click the **Columns** button to display the **Columns** flyout. This option lets users **include or exclude** columns from the grid and **filter** them easily using the **Search** field. **Checked** ☑ columns are **visible** while **unchecked** ☐ columns are **hidden**. **Drag handles** let users **rearrange the order of columns**, and users can also move columns directly from the **Existing Reports** grid.

Recurring Reports Grid

The **Recurring Reports** grid contains a list of recurring reports that are scheduled to run at a specific frequency and be delivered at a certain time.

Note: Visible columns depend on selections made using the **Columns** button.



A. **Quick Filters** – Click this drop-down to **clear all filters** from the **Recurring Reports** grid or **reset the grid** to its default state.

B. **Schedule Recurring Report** – Click this button to **schedule a recurring report**.

C. **Toggle Filter** – Click the **Toggle Filter** icon to show or hide the **filter fields**.

D. **ID** – This column displays the **ID number** of the report.

E. **Name** – This column displays the **name** of the report.

F. **Template Type** – This column displays the **template type** used to create the report.

G. **Frequency** – This column displays the **frequency** of the report: **Daily**, **Weekly**, or **Monthly**.

H. **Schedule Creation Date** – This column displays the **date** the report is **scheduled to generate**.

I. **Status** – The **status** of the report:

- **Active** – The report is **currently being generated** using the specified filters.

- **Inactive** – The report is **no longer being generated**.

J. **Actions** – This column contains the following **Action** icons:

- **Edit** – Click the **Edit** icon to **edit** the scheduled report.

- **Delete** – Click the **Delete** icon to **delete** the scheduled report.

K. **Actions (button)** – Click the **Actions** button to display the **Actions** flyout, then select an option from the list:

- **Clear all filters** – Click the **Clear all filters** option to **remove all filters** from the **Recurring Reports** grid.

- **Export selected data as csv** – This option **exports selected data** in the **Recurring Reports** grid to a downloadable CSV file.

- **Export all data as csv** – This option **exports all data** in the **Recurring Reports** grid to a downloadable CSV file. The CSV file will include both visible and hidden columns.

- **Export visible data as csv** – This option **exports visible data** in the **Recurring Reports** grid to a downloadable CSV file. Hidden columns will not be included in the CSV file.

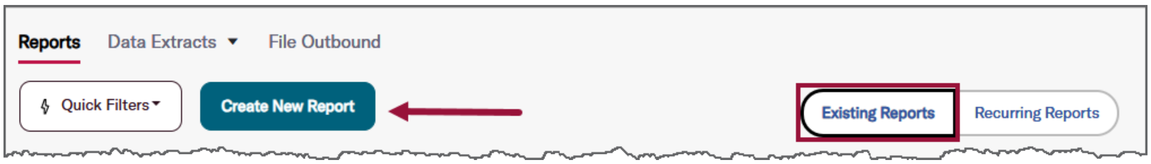
- **Export to Excel:** This option **exports all data** in the **Recurring Reports** grid to a downloadable Excel file.

L. **Columns (button)** – Click the **Columns** button to display the **Columns** flyout. This option lets users **include or exclude** columns from the grid and **filter** them easily using the **Search** field. **Checked** ☑ columns are **visible** while **unchecked** ☐ columns are **hidden**. **Drag handles** let users **rearrange the order of columns**, and users can also move columns directly from the **Recurring Reports** grid.

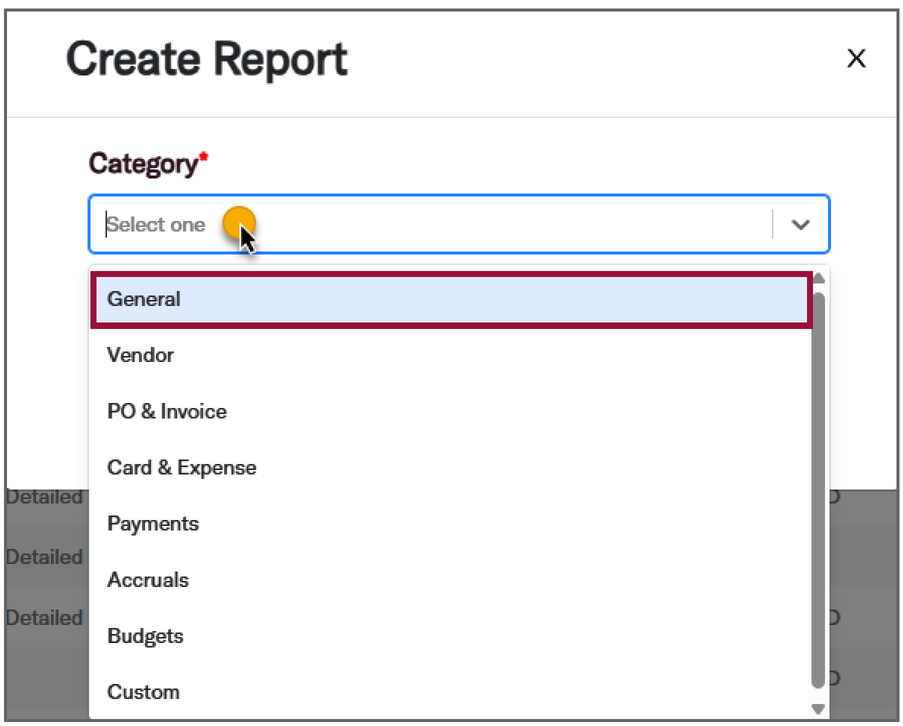
Create a Report

This section describes how to create a one-time report.

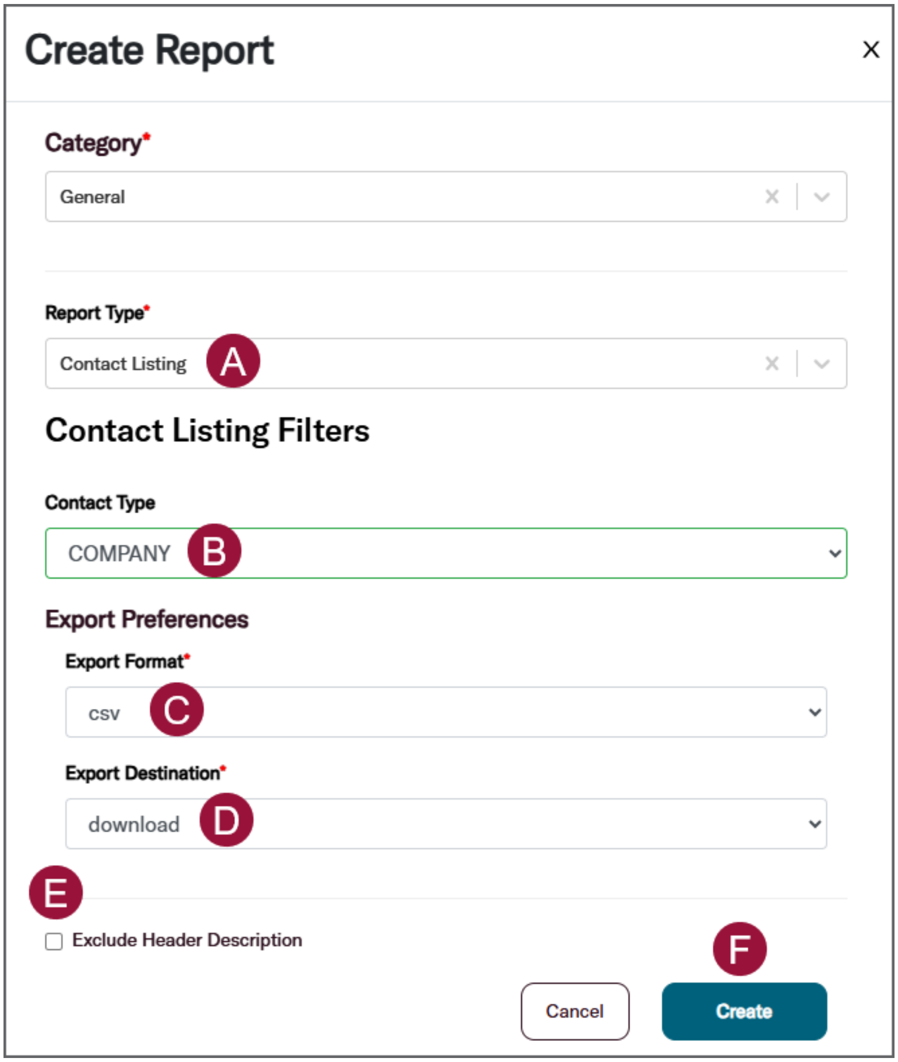
1. On the **Existing Reports** tab of the **Reports** page, click the **Create New Report** button.



2. On the **Create Report** dialog, select **General** from the **Category** drop-down. The dialog will expand automatically.



3. Complete the following fields on the **Create Report** dialog:



Note: Required fields are noted with a red asterisk.

A. **Report Type** – Select the type of report to be created. In this example, a **Contact Listing** report will be shown.

   Note: Available fields in the **Create Report** dialog will vary depending on the selected **Report Type**.

B. **Contact Type** – Select the **Contact Type** drop-down to filter the report by a specific **contact type**:

   - **All** – Select this option to include both **Company** and **Vendor contacts** in the report.
   - **Vendor** – Select this option to include **Vendor contacts** in the report.
   - **Company** – Select this option to include **Company contacts** in the report.

C. **Export Format** – Select an export format for the report:

Note: The availability of export formats may vary depending on the selected report.

- **CSV**
- **XLSX**

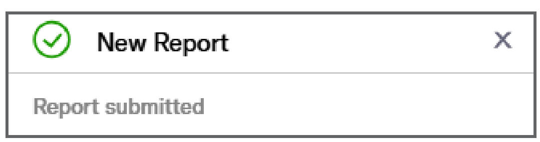
D. **Export Destination** – Select an **export destination** for the report:

- **Download** – The report will be **automatically downloaded** to the designated web downloads folder.
- **Email** – If **Email** is selected, a field to key in the **email address(es)** will display and the report will be **emailed to the specified email address(es)**.
- **SFTP** – This option is used for **secure file-transfer protocol (SFTP)**. Select this option if the Company has a valid integration setting for SFTP.

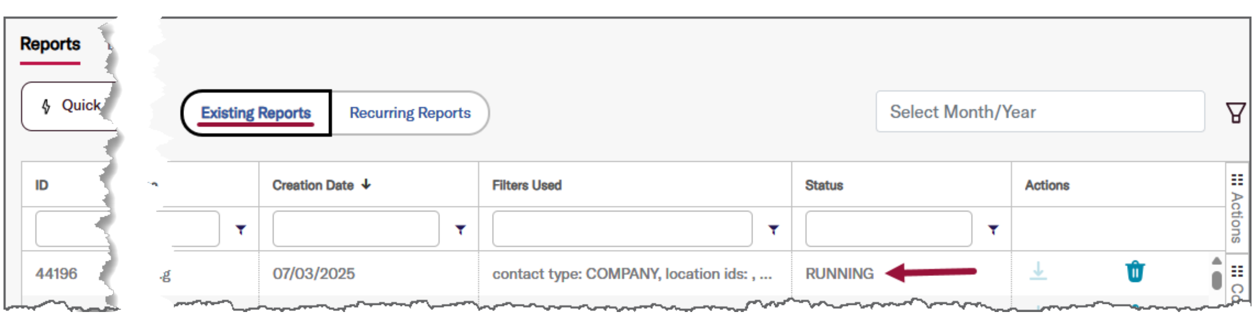
E. **Exclude Header Description** – This checkbox **excludes column headers** on the report. Corpay does not recommend checking this box.

F. **Create** – Click the **Create** button to **generate the report**. A report may take anywhere from one to ten minutes depending on the Company account and the amount of data in the filters.

4. The **New Report** dialog will display.

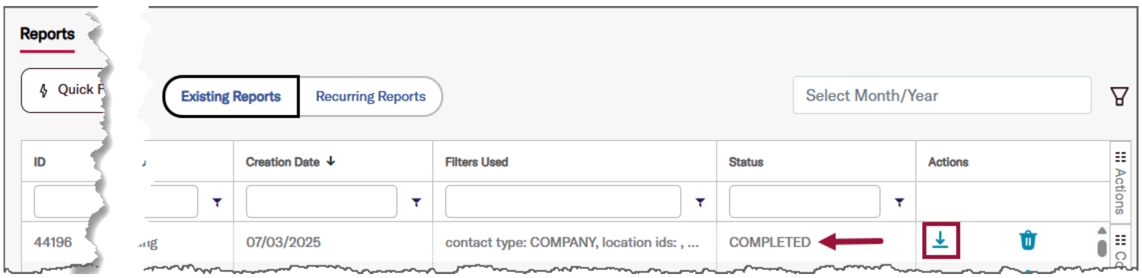


5. The **Existing Reports** tab will display, and the report will begin generating. Users may need to refresh their screens for the status to change to **Completed**.



6. Once the status changes to **Completed**, the report will be delivered as specified in the **Export Destination**.

   Note: Reports can be downloaded at any time after their completion using the **Download** icon in the **Actions** column.

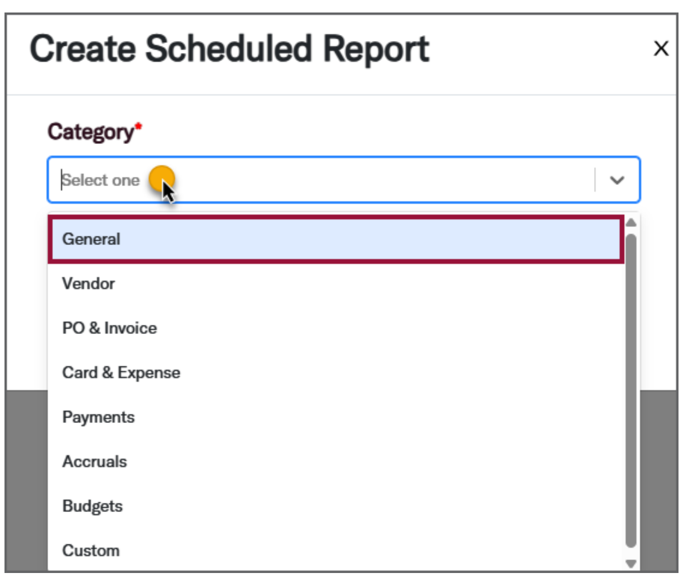


Schedule a Recurring Report

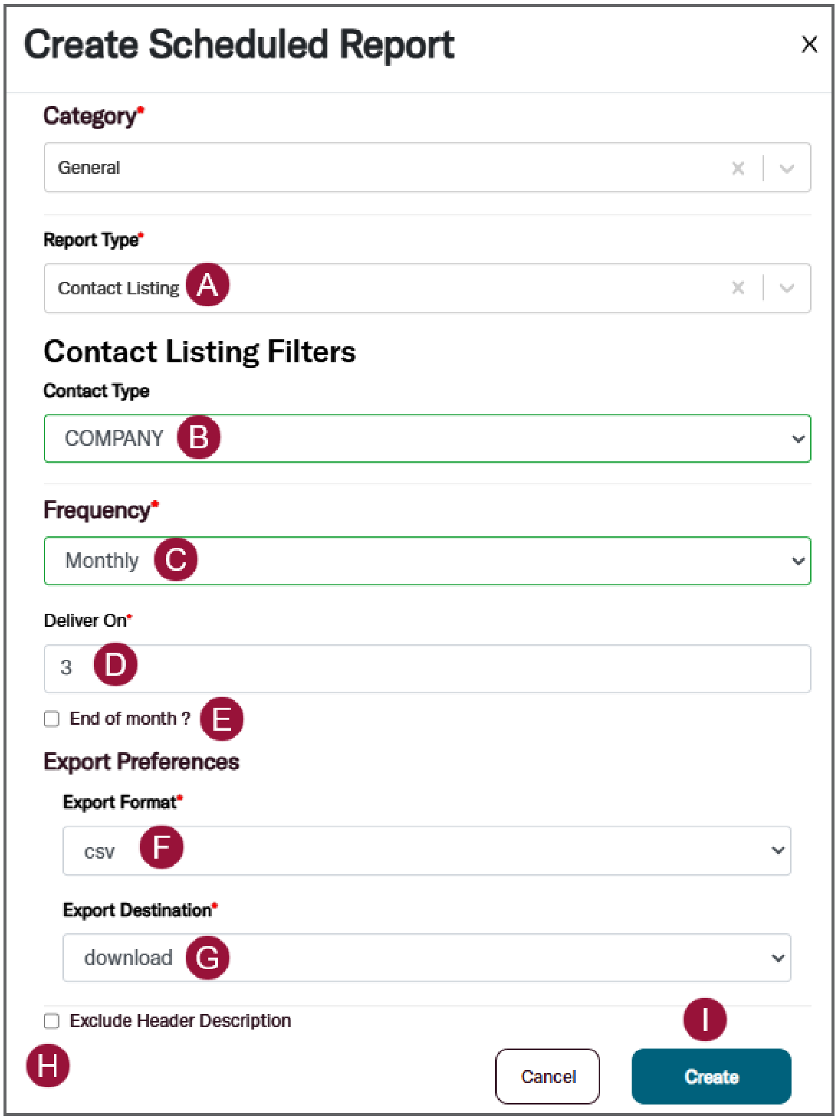
This section describes how to schedule a recurring report that runs at a specific frequency and is delivered at a certain time.

1. From the **Reports** page, click the **Recurring Reports** tab.

2. On the **Create Scheduled Report** dialog, select **General** from the **Category** drop-down. The dialog will expand automatically.



3. Complete each field on the **Create Scheduled Report** dialog:



Note: Required fields are indicated with a red asterisk.

A. **Report Type** – Select the [type of report] to be created. In this example, a **Contact Listing** report will be shown.

   Note: Visible fields in the **Create Scheduled Report** dialog will vary depending on the selected **Report Type**.

B. **Contact Type** – Select the **Contact Type** drop-down to filter the report by a specific **contact type**:

   - **All** – Select this option to include both **Company** and **Vendor contacts** in the report.

- **Vendor** – Select this option to include **Vendor contacts** in the report.
- **Company** - Select this option to include **Company contacts** in the report.

C. **Frequency** – Select a **frequency** for the report to be delivered: **Daily**, **Weekly**, or **Monthly**.

D. **Deliver On** – Select the **date** when the report should be delivered.

Note: This field may not display depending on the selected frequency.

E. **End of Month** – If a **Monthly** frequency is chosen, click the **End of month?** checkbox to have the report delivered at the end of the month.

F. **Export Format** – Select an **export format** for the report:

Note: The availability of export formats may vary depending on the selected report.

- **CSV**
- **XLSX**

G. **Export Destination** – Select an export destination for the report:

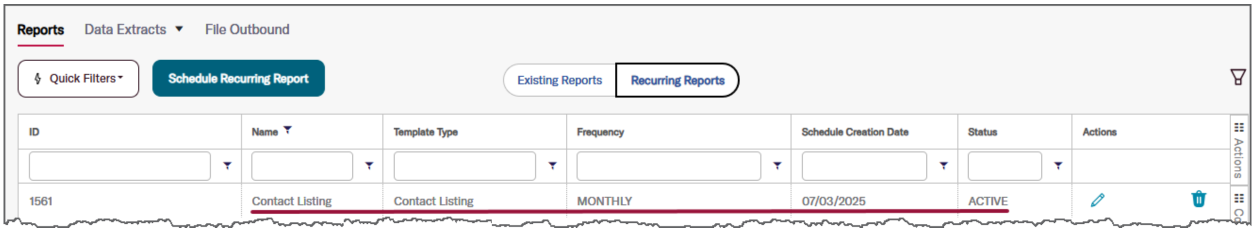
- **Download** – The report will be **automatically downloaded** to the designated web downloads folder.
- **Email** – If **Email** is selected, a field to key in the **email address(es)** will display and the report will be **emailed to the specified email address(es)**.
- **SFTP** – This option is used for **SFTP**. Select this option if the Company has a valid integration setting for SFTP.

H. **Exclude Header Description** – This checkbox **excludes column headers** on the report. Corpay does not recommend checking this box.

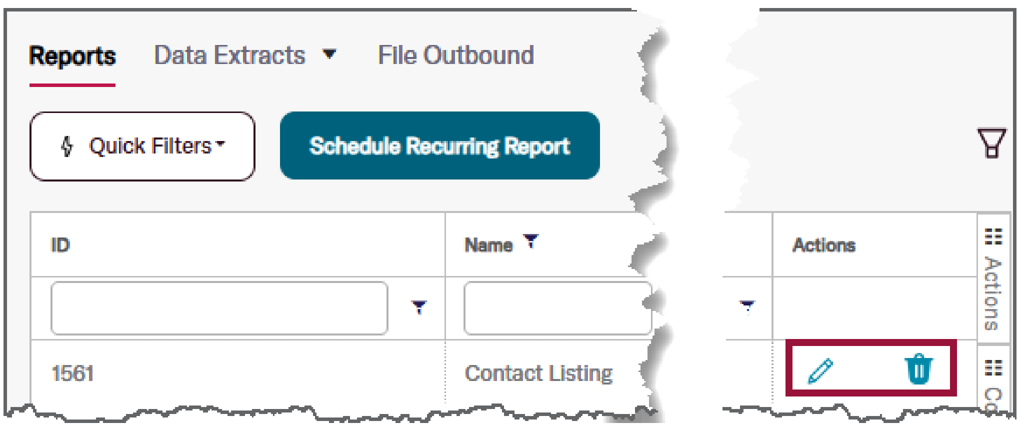
I. **Create** – Click the **Create** button to schedule the recurring report.

4. The **New Scheduled Report** dialog will display.

5. The new report will display in the **Recurring Reports** grid and will be delivered on the specified date.



6. To **edit or delete** the report, click the **Edit** icon or **Delete** icon in the **Actions** column.



Available Reports in the Users Module

The following table provides descriptions of the standard user reports that are available to Companies in Corpay Complete.

Report Type	Description	Export Format
Contact Listing	The **Contact Listing** report provides a list of contacts in Corpay Complete. Users have the option to list Vendor contacts, Company contacts, or all contacts.	CSV, XLSX
Master User Listing	The **Master User Listing** report provides a comprehensive master list of Vendor user activities, including login history, email interactions, and other relevant actions.	CSV, XLSX