Corpay^

Corpay Complete

Navigation and Core Features

User Guide

Version 1.0

Version	Date	Description of Changes
1.0	01/29/2026	Initial Release

Table of Contents

Corpay Complete Overview

Corpay Complete is a cloud-based spend management platform that brings key financial activities together in one place. The platform supports invoice processing, payments, purchase orders, Cards, expenses, approvals, Vendor management, and reporting within a single, consistent interface.

Corpay Complete integrates with Companies' ERP systems to help ensure that financial data remains accurate and synchronized. By consolidating spend workflows into one platform, Companies gain better visibility, improved efficiency, and streamlined control over their Accounts Payable operations.

Roles, Permissions, and Visibility

Access to features, modules, and data in Corpay Complete is controlled by a combination of **Company configuration**, **assigned user roles**, and **enabled products**. As a result, the screens, actions, and options available to each user may vary. Users will only see the modules, pages, and functionality required for their role, and some information may be view-only or hidden entirely based on permissions. When reviewing this guide or other Corpay Complete documentation, not all features described may be available in every environment.

Purpose of this Guide

The **Corpay Complete Navigation and Core Features User Guide** explains how users navigate and interact with Corpay Complete at a platform level. This guide focuses on navigation patterns, shared tools, and consistent behaviors that appear across multiple modules, rather than on module-specific workflows.

By understanding these core features, users can move confidently throughout the platform, locate records efficiently, interpret grid behavior, and recognize common tools and controls across all modules.

This guide covers the following topics:

- How to access Corpay Complete
- Key navigation elements used throughout the platform
- Basic system concepts, such as grids, filters, and the Column Editor
- Record history tools that apply across modules

- Notifications and messaging
- High-level overviews of each module
- How to locate additional resources and detailed module-specific guides

For detailed procedures and module-specific workflows, refer to the individual user guides and articles in the **Corpay Complete Knowledge Base**. Select a module name in the Corpay Complete Knowledge Base to view its corresponding user guide.

Who Should Use This Guide

This guide is designed for all Customers who access Corpay Complete as part of their Company's financial operations. This includes:

- Employees submitting invoices, expenses, or purchase requests.
- Managers responsible for reviewing and approving financial activity.
- Administrators overseeing spend management, reporting, or data accuracy.
- Any user who needs a clear introduction to the platform before performing module-specific tasks.

Whether a user works daily within the platform or only accesses it for occasional approvals, this guide provides the shared navigation context and core feature awareness needed to use Corpay Complete efficiently and accurately.

Access Corpay Complete

Access to Corpay Complete varies based on Company configuration and security requirements. Companies may use **Single Sign-On (SSO)** or **Corpay-managed authentication** and may require additional verification such as **Multi-Factor Authentication (MFA)** or **Two-Factor Authentication (2FA)**.

Detailed information about authentication methods, sign-in behavior, MFA and 2FA configuration, password management, and account recovery is provided in the **Corpay Complete User Profile and Users Module User Guide**.

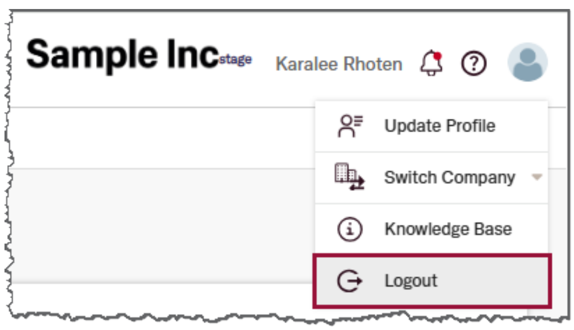
Log Out of Corpay Complete

Logging out is recommended when accessing Corpay Complete from shared or public devices.

To end a session securely:

1. Click the **Avatar** icon in the upper-right corner of any page.

2. From the **Avatar** drop-down, select **Log Out**.



Switch Company

Some organizations use Corpay Complete to manage multiple Companies within a single environment. When users have access to more than one Company, the Switch Company feature provides a way to change the active Company Instance. Selecting the correct Company is important because it determines which data, modules, and records are visible in the platform.

Users may switch Companies at any time during a session.

Company Switching Process

When a user selects a different Company, Corpay Complete updates the platform to reflect that Company's configuration, permissions, and available modules. This ensures that all actions, such as reviewing invoices, managing Vendors, or viewing dashboard data, occur within the appropriate Company Instance.

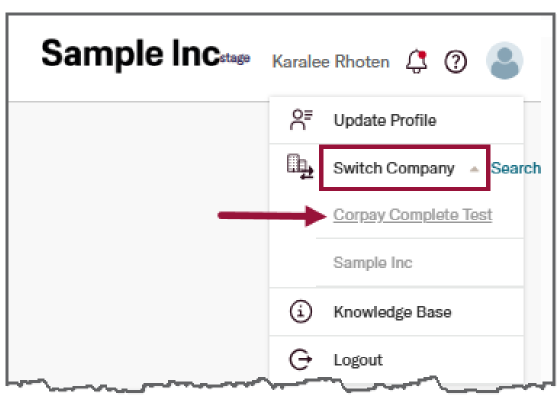
If the user's account is associated with multiple Companies, those Companies appear in the Switch Company menu. Users will only see Companies they are authorized to access.

How to Switch Companies

This section describes how to switch to a different Company in Corpay Complete.

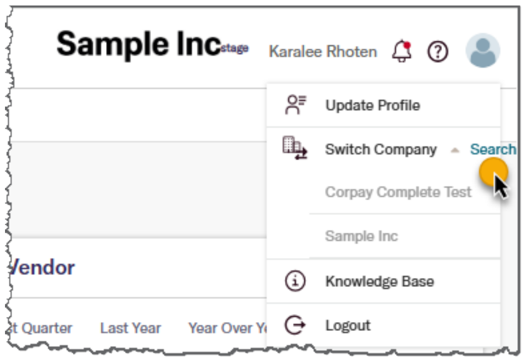
1. In the upper right corner of any page in Corpay Complete, click the **Avatar** icon.

2. In the **Avatar** drop-down, click the **Switch Company** option. Then, click the **name** of the Company to open it.

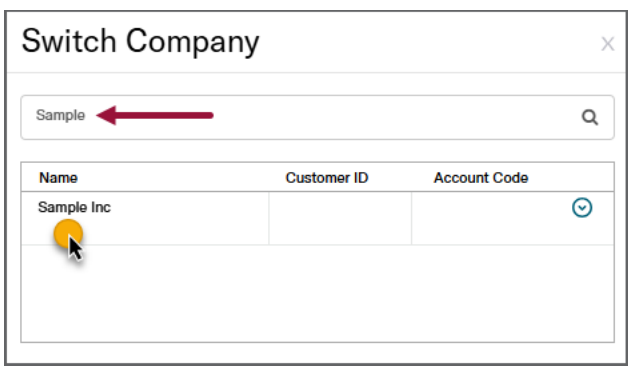


3. Selecting a Company immediately updates the view to that Company's instance.

4. To search for a Company, click the **Search** link in the Avatar drop-down.



5. In the **Switch Company** dialog, **type the name** of the desired Company in the **Search** field. Next, **select the Company** from the search results.



6. The new Company will display.

Company Switching Behavior

- **Company visibility depends on permissions** and **Company-level configuration**. Some users will only see one Company even if others exist.

- **Filters applied in one Company may carry over to another**. Users may need to clear filters if data appears incomplete or unexpected.

- Switching Companies **does not log the user out**. It only **changes the active Company instance**.

Platform Structure

Navigation Basics

Corpay Complete uses a consistent navigation framework across all modules. Once users understand the core layout and how information is presented, they can move through the platform efficiently. Navigation centers around the **left navigation panel for selecting modules** and the **main workspace for reviewing data and performing tasks**.

Most modules display information in **grids**, which serve as the starting point for **locating records, comparing data, and opening detail pages**. Because this structure remains uniform throughout the platform, users can rely on the same navigation patterns regardless of the module they are using.

Layout and Modules

Corpay Complete organizes functionality into modules such as **Invoices**, **Vendors**, **Payments**, **Approvals**, **Cards**, and **Reports**. Each module contains the pages, grids, and actions required for that workflow. The modules displayed in the navigation pane depend on the Company's configuration and the user's assigned permissions.

Left Navigation Panel

The **left navigation panel** is the **primary way users move between modules** in Corpay Complete. It remains visible throughout the platform and provides access to the modules available to the user based on Company configuration and assigned permissions.

Modules are organized in a vertical list within the navigation pane. Each module represents a specific area of functionality. The currently active module is highlighted in the navigation panel.

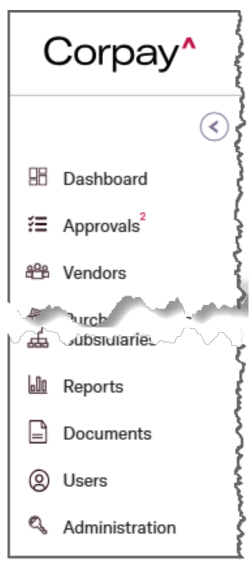
Users open a module by selecting its name in the left navigation panel. When a module is selected, the main workspace updates immediately to display that module's grid or landing page. The previously open module closes automatically.

Users may switch between modules at any time during a session by selecting a different module name in the navigation panel. Switching modules does not log the user out or discard work. However, grid settings such as filters, column visibility, or pagination may persist depending on the module and the user's previous activity.

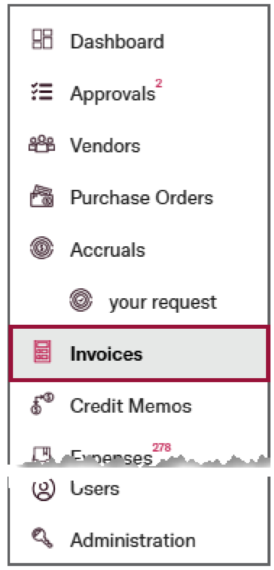
The left navigation panel remains available regardless of which module is active, allowing users to move freely between workflows. If a module does not appear in the navigation panel, the user does not have access to it.

To navigate using the left panel:

1. Locate the **list of modules** on the left side of the platform.



2. Select a **module name** to load its workspace in the main area of the screen.



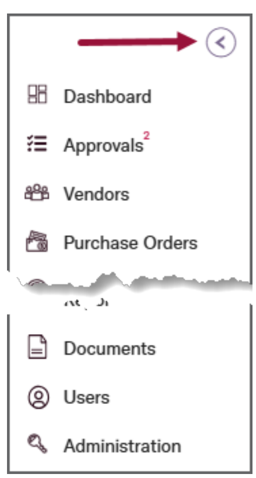
3. Continue selecting modules as needed. Corpay Complete updates immediately to display the selected module.

Collapse and Expand the Navigation Panel

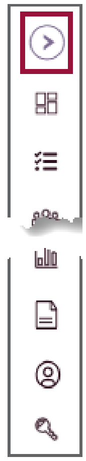
Users may adjust the size of the left pane to create more workspace.

To collapse or expand the panel:

1. Select the **collapse** icon in the upper corner of the panel to reduce it to a compact view.



2. Select the **expand** icon to restore the panel to full size.



Module Behavior

Although each module supports different tasks, the structure remains consistent:

- The **left panel** is always used to select modules.
- The **main workspace** always **updates based on the selected module**.
- **Most modules open to a grid**, allowing users to scan and review multiple records at once.

This predictable structure reduces the learning curve and helps users navigate confidently as they move between different areas of the platform.

Grid Overview

Grids are the primary method Corpay Complete uses to present financial and operational data. Nearly all modules begin with a grid view so users can review multiple records, compare values across columns, and identify items that require further action.

Grid Components

Each grid is composed of rows and columns:

- **Rows** represent **individual records**, such as invoices, purchase orders, or Vendors.

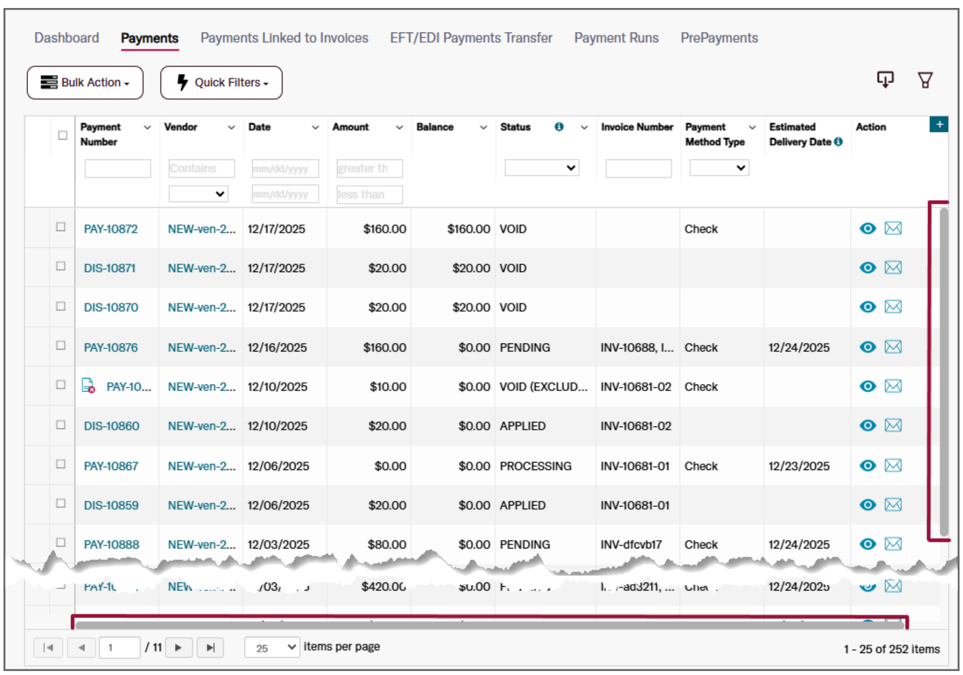
- **Columns** display **specific data fields associated with each record**, such as status, amount, date, or Vendor name.

Because grids follow a consistent layout, users can expect similar behavior throughout the platform, regardless of module.

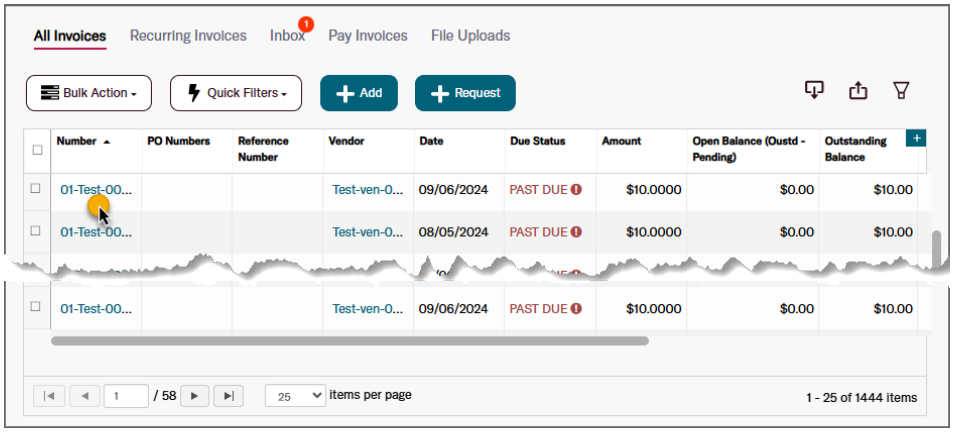
Grid Record Interaction

Users interact with grid data in several ways:

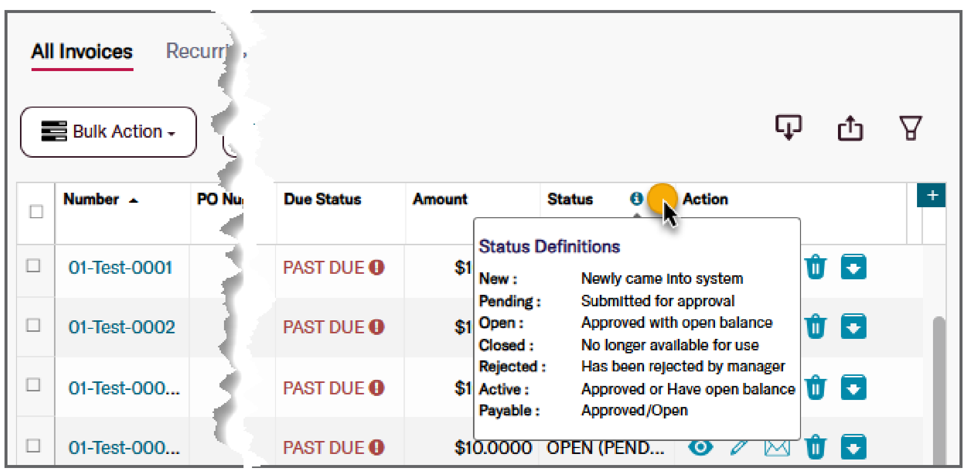
- **Scroll** vertically or horizontally to view all data in the grid.



- **Select an item in a row** to open that record's details page. Note that not all row items contain hyperlinks to detail pages. In the following example, clicking the invoice Number will open the Invoice Details page.



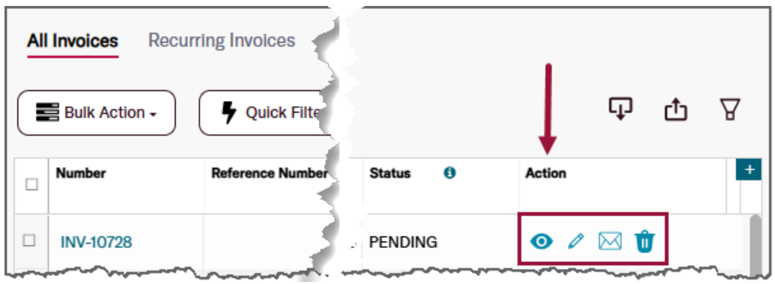
- **Hover over fields** to reveal tooltips when available.



These behaviors function consistently across modules, allowing users to apply familiar interaction patterns in any part of the platform.

Action Icons

In addition to clicking linked fields to open records, many grids in Corpay Complete include an **Action** column. The **Action** column contains icons that allow users to take common actions on a record directly from the grid without first opening the record's details page.



Action icons follow consistent interaction patterns across modules, although the specific icons displayed may vary based on record type, user role, record status, and Company configuration.

Common Action Icons

The following **Action** icons appear frequently across grids in Corpay Complete and represent core record-level actions.

View

Click the **View** icon to **open the record's details page**. This icon provides an alternative way to access the record's details page.

Edit

Click the **Edit** icon to **update the record**. Depending on the record type and user permissions, this may open an edit dialog or place the record into an editable state. Edit availability is often restricted based on role or record status.

Message

Click the **Message** icon to **open the Messages panel** for the record. Messages are tied to the selected record and allow users to communicate with other users or Vendors, depending on configuration. For more information about message behavior and notifications, refer to the Messages section in this guide.

Delete

Select the **Delete** icon to **permanently remove a record or relationship**. This action **deletes all associated information for the record**, including **historical data** that may be required for reporting, audit review, or compliance purposes.

Because deletion removes the record entirely from Corpay Complete, this icon **should generally not be used unless explicitly instructed**. Instead, records should be **deactivated or otherwise managed through status changes** rather than deleted to preserve system history and data integrity.

Important Usage Notes

Keep the following points in mind when working with **Action** icons:

- Not all grids include an **Action** column.
- Not all **Action** icons are available on every record.
- Icon availability depends on user role, permissions, record status, and Company configuration.
- Some Action icons open dialogs, while others navigate directly to a details page.
- Certain modules include additional, context-specific Action icons that are explained in the relevant module user guides.

Relationship Between Grids and Navigation Tools

Many of the navigation tools described later in this guide are designed to adjust how information appears within grids. These tools support filtering, sorting, customizing columns, exporting data, and acting on selected records. Understanding how grids are structured provides the foundation for using these tools effectively as users work throughout the platform.

Navigation Concepts

Corpay Complete presents information using consistent patterns across the platform. The concepts in this section provide a high-level understanding of how data is organized and how users will interact with it before learning the specific tools used to navigate grids and records.

For additional details of how navigation tools function within specific modules, refer to the user guides in the **Corpay Complete Knowledge Base**. Select a module name in the Knowledge Base to view its corresponding user guide.

Grid-Based Navigation Concepts

Most modules in Corpay Complete use **grids** to display information. Grids organize data into rows and columns so users can review multiple records at once and locate items that require attention. Because this structure appears throughout the platform, users can expect similar navigation behavior regardless of the module they are viewing.

Filtering Concepts

Corpay Complete supports two types of filtering:

- **Quick Filters**, which apply predefined conditions, and
- **Column-level filter fields**, which allow users to enter specific criteria.

Filters remain active until cleared, which may affect results as users navigate between modules or Company Instances. Understanding this behavior helps users interpret what they see on the screen and recognize when to clear filters.

Column Visibility Concepts

Not all columns in a grid are visible by default. Users can choose which fields to display so they can focus on the information most relevant to their work. Customizing column visibility does not affect other users and does not change the data itself, only how it is presented within the grid.

Consistent Interaction Patterns Across Modules

Although each module serves a different purpose, Corpay Complete **maintains consistent interaction patterns** to reduce the learning curve. Users will encounter similar **grid layouts**, **panel structures on details pages**, and **navigation tools** throughout the platform. This consistency allows users to apply familiar patterns as they move between workflows.

Relationship Between Concepts and Tools

Navigation Concepts explain **how Corpay Complete organizes information** and **how users should think about navigation at a high level**. The next sections introduce the **specific tools** that users will apply when working with grids and records, such as filtering, column tools, sorting options, and export features.

Keeping these concepts in mind will help users understand why the navigation tools work the way they do and how to use them effectively during daily tasks.

Navigation Controls

Navigation controls help users **adjust how information appears in grids** and **allow users to take action on records within those grids**. These tools support filtering, sorting, column customization, exporting, and applying actions to selected records.

Filter Controls

Filter controls **narrow the information displayed in a grid** so users can locate the records that are most relevant to their work. Corpay Complete provides two filtering methods: **Quick Filters** and **filter fields**.

Quick Filters

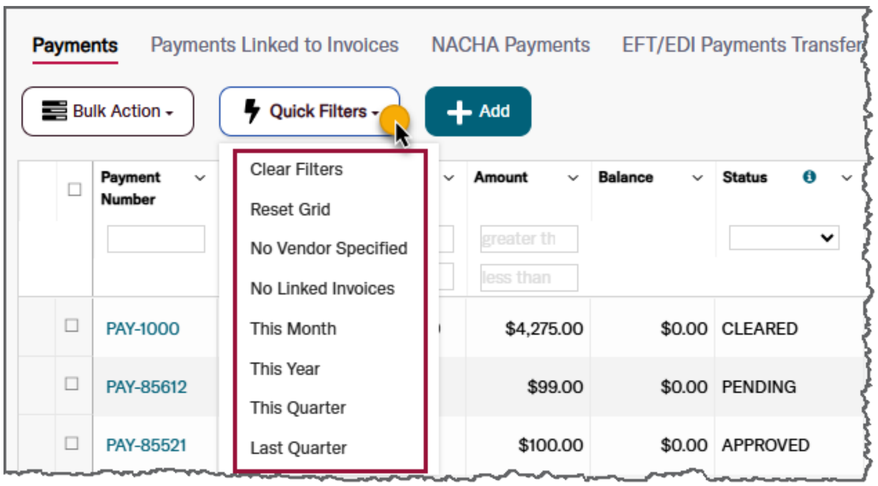
Quick Filters provide a fast way to **narrow the records displayed in a grid** by applying predefined conditions, such as identifying missing information, isolating items that require action, or limiting results to a specific time period. These filters are designed to help users **locate common subsets of data** without entering detailed criteria.

Quick Filter options vary by module and grid, so the available conditions depend on where the user is working. Filters apply immediately when selected and remain active until cleared, which may affect results as users navigate between modules or switch Companies.

Use Quick Filters

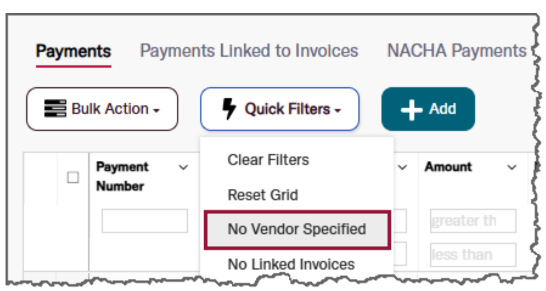
To use the Quick Filters drop-down:

1. Select the **Quick Filters** drop-down at the top of the grid.



2. Review the list of available conditions. The options shown will depend on the module and the specific grid.

3. Select a condition to apply it. The grid updates immediately based on the selected option.

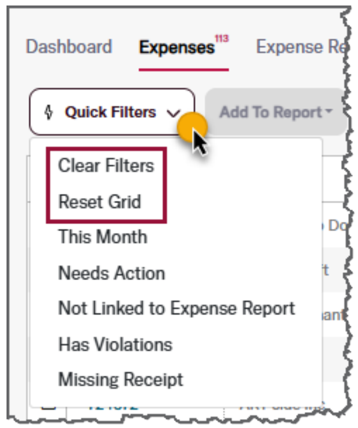


Users may apply **Quick Filters together with column-level filter fields** to further refine the results.

Clear Quick Filters

Quick Filters remain active until cleared. To remove Quick Filters from a grid:

- Select the **Quick Filters** drop-down and choose **Clear Filters**, or
- Select **Reset Grid** to restore the grid to its default state.



If grid results appear incomplete, users should **verify whether a Quick Filter is still active**.

Filters retain their values as users move between modules and Company instances. If expected records do not appear, clear existing filters before continuing.

Filter Fields

Filter fields allow users to **enter specific criteria** for **individual grid columns**, **supporting text**, **numeric**, **date**, or **selectable values** depending on the column type. These fields provide more precise control over search results than Quick Filters.

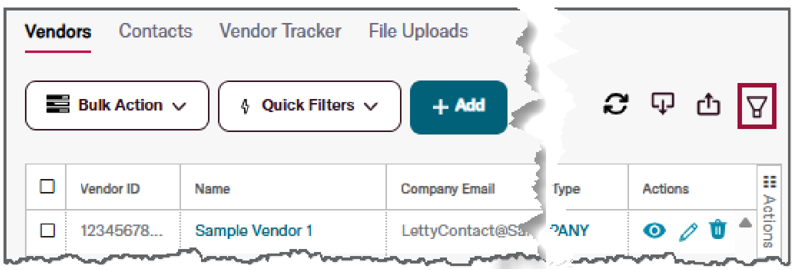
Filter criteria **apply only to the current grid but remain active until cleared**, even when filter fields are hidden. As a result, users may see fewer records than expected when navigating between grids or switching Companies.

Show or Hide Filter Fields (Toggle Filter)

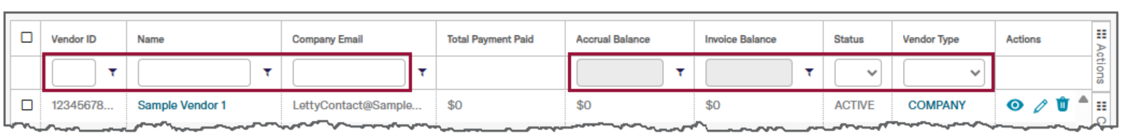
The **Toggle Filter** icon **controls the visibility of the filter fields**. Hiding filter fields **does not remove the filters** that have been applied. **Filters remain active until cleared** through the **Quick Filters** controls or by removing values from the individual fields.

To show or hide filter fields:

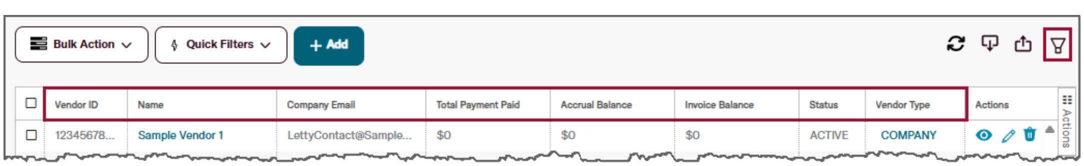
1. Select the **Toggle Filter** icon to display **filter fields**.



2. Review the **filter fields** that appear under each column.

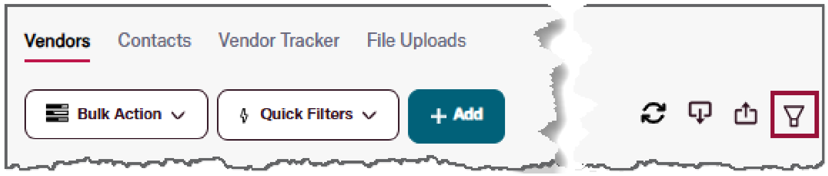


3. Select the **Toggle Filter** icon again to **hide the fields** when they are not needed.

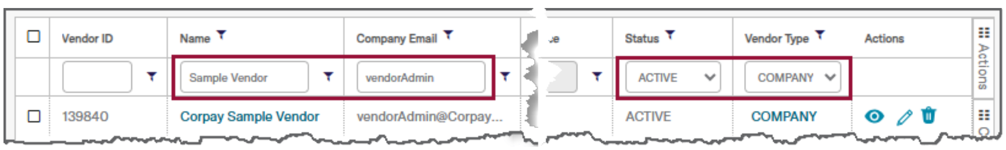


Apply or Clear Filter Criteria

1. Display the **filter fields** using the **Toggle Filter** icon.

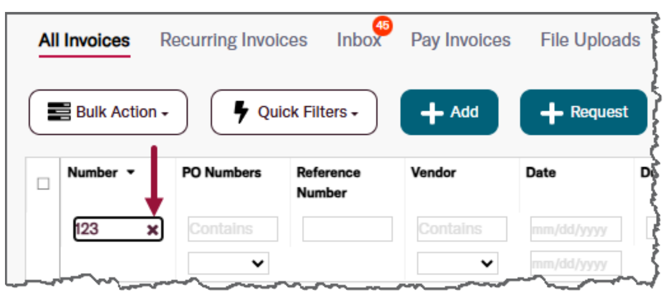


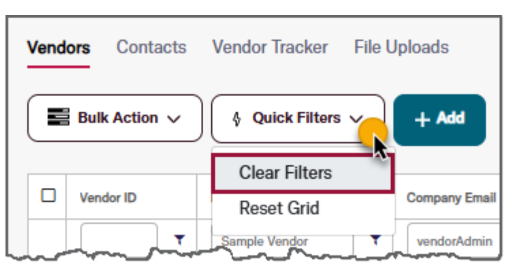
2. **Key in text or select values** in the desired **filter fields**.



3. Review the updated grid results. Results appear immediately based on the criteria entered.

4. Click the **X** inside an individual filter field to clear that specific filter or click the **Quick Filters** drop-down and select **Clear Filters** to remove all filters at once.





- Filters **remain active whether filter fields are shown or hidden**.
- Filters **carry over between modules** and **between Company Instances**.
- It is **recommended that users clear all filters** when switching Companies or when grid results appear incomplete.

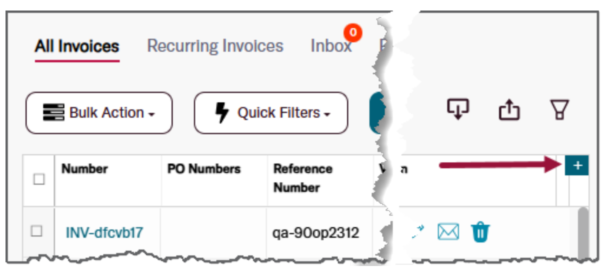
Column Controls

Column controls allow users to customize which fields appear in a grid and how they are arranged. Adjusting column visibility affects only the user's view and does not change the data for others.

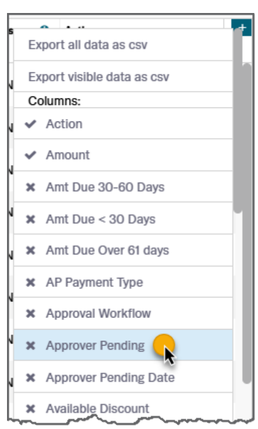
Column Editor

The **Column Editor lists all available columns** that can be **shown or hidden in the grid**.

1. Click the **Column Editor** icon at the right side of the grid.



2. Select or clear column names to show or hide them. Items with a **checkmark are displayed** while items with an **x are hidden**.

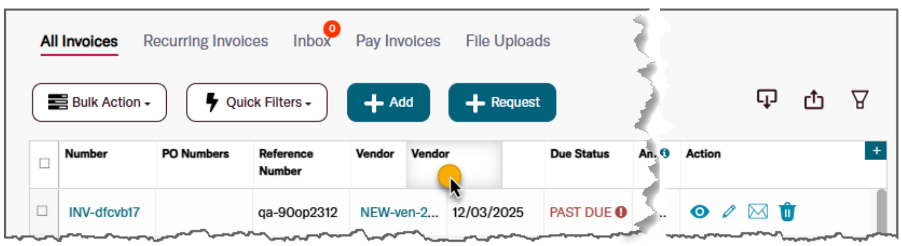


3. Users can also choose to **export all data** or **export visible data to a CSV** file from the **Column Editor** menu.

When exporting visible data to a CSV file, ensure the **grid's Items Per Page drop-down is set to display all items**. For example, if there are 60 items in the grid but only 50 are shown per page, adjust the **Items Per Page** drop-down accordingly.

4. Click outside the **Column Editor** to return to the grid.

5. Drag columns to reorder their placement in the grid.

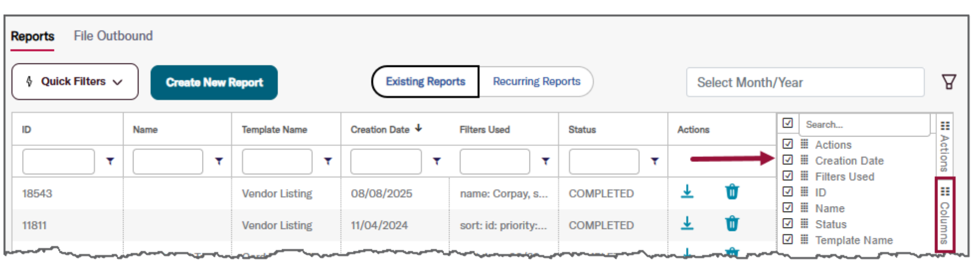


Columns Button and Columns Flyout

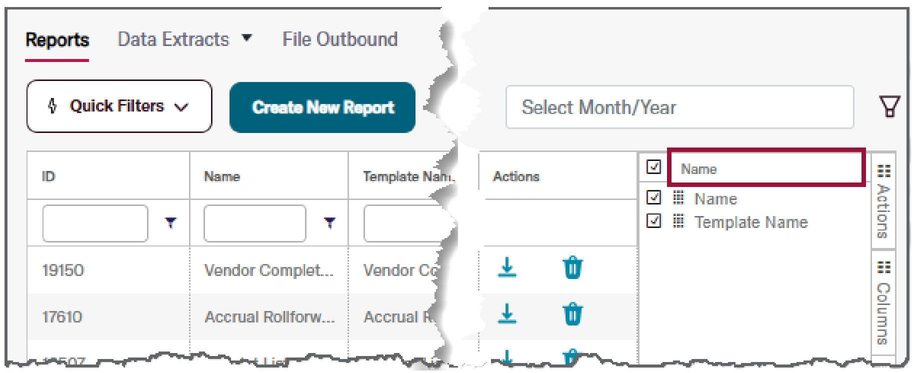
Some grids use a **Columns** button instead of the Column Editor. Selecting the Columns button opens a **Columns flyout** with similar functionality to the Column Editor. Although the interface varies slightly depending on where the **Columns** button is located, the purpose is identical: determining which columns appear in the grid.

To adjust columns using the **Columns** button and flyout:

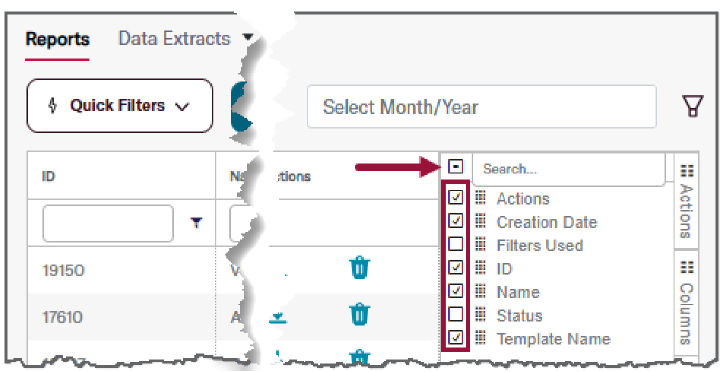
1. Select the **Columns** button to open the **Columns** flyout.



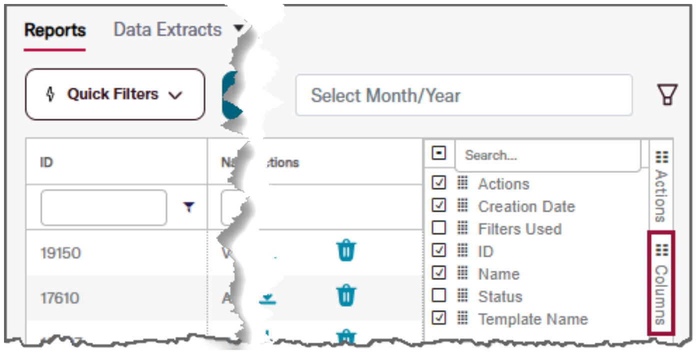
2. Use the **Search** field to search for a specific column. This feature is helpful if the **Columns** flyout contains many column names.



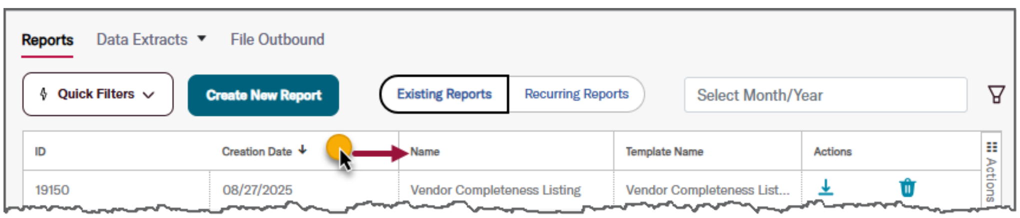
3. Check or uncheck column names to adjust visibility. Checked columns will appear in the grid, and unchecked columns will be hidden. To select or clear all columns at once, use the **Select All** or **Deselect All** checkbox at the top of the grid. The grid updates automatically as you make changes.



4. Click the **Columns** button to close the **Columns** flyout.



5. Drag columns to reorder their placement in the grid.



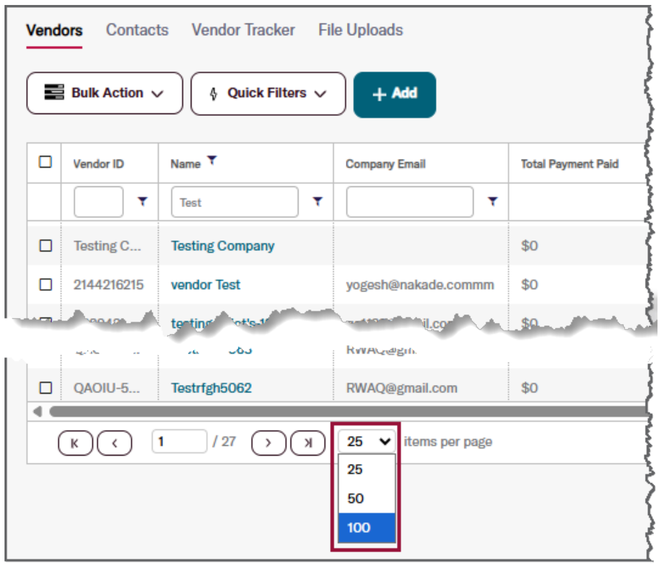
Pagination

Pagination controls **determine how many records appear in a grid at one time**. These controls appear at the bottom of most grids throughout Corpay Complete and allow users to navigate large datasets efficiently.

Corpay Complete grids display records in pages. Each page contains a specific number of rows, which users can adjust using the **Items Per Page** drop-down. Pagination affects how much data is visible at once and may influence certain export behaviors.

Items Per Page

Users can adjust how many records appear on each page by selecting a value from the **Items Per Page** drop-down. Increasing this value displays more records at once, which can be helpful when scanning large datasets or preparing visible data exports.



Changing this setting affects only the user’s view of the grid and does not impact other users.

Page Navigation Controls

Page navigation controls allow users to move between pages in a grid and include the following controls:

Page navigation control icons **may look different depending on the grid where they are accessed**, but they function the same way.

- **First Page:** Click the **First Page** icon to return to the **first page** of the grid.
- **Previous Page:** Click the **Previous Page** icon to return to the **previous page**.
- **Page Number:** This field lists the **current page number** 9 / 27. Key in a different one to move through the grid.

- **Next Page:** Click the **Next Page** icon to move to the **next page**.

- **Last Page:** Click the **Last Page** icon to move to the **last page** of the grid.

These controls help users move through records without scrolling through excessively long pages.

Pagination Considerations

Users should keep the following points in mind:

- Unlike **filters**, pagination settings **apply only to the current grid**.

- The **Items Per Page** drop-down impacts **visible-data exports**. If exporting visible data, **users should ensure the page contains all intended rows**.

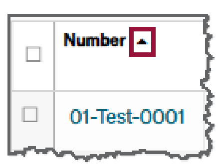
- **Adjusting pagination does not modify data**. It determines only **how much data is displayed** at one time.

Sorting

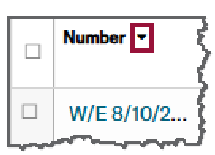
Sorting reorganizes grid data based on the values in a selected column.

To sort a column, click the column header and choose **ascending** or **descending order**. **Ascending order** is indicated by an **upward-facing arrow** while **descending order** is indicated by a **downward-facing arrow**.

Ascending Order



Descending Order



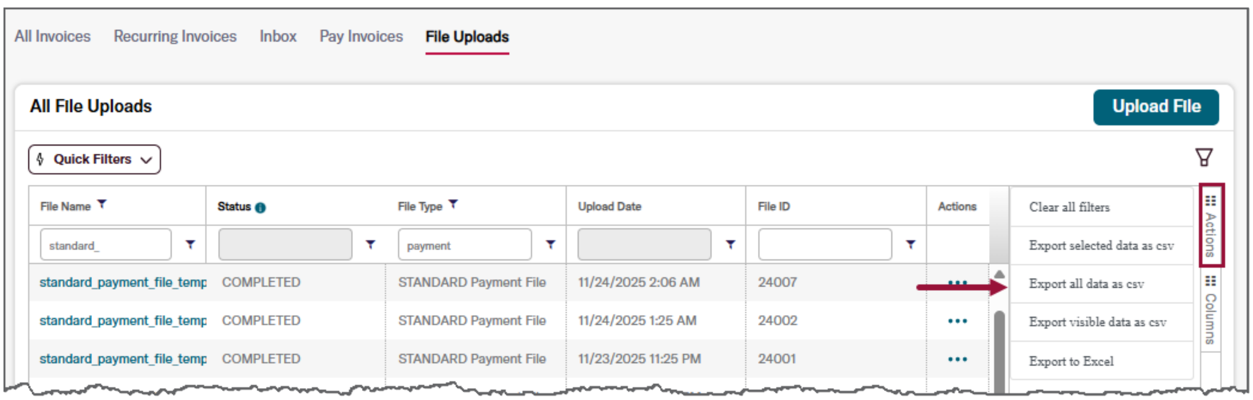
Sorting **applies only to the selected column**.

Actions Button and Actions Flyout

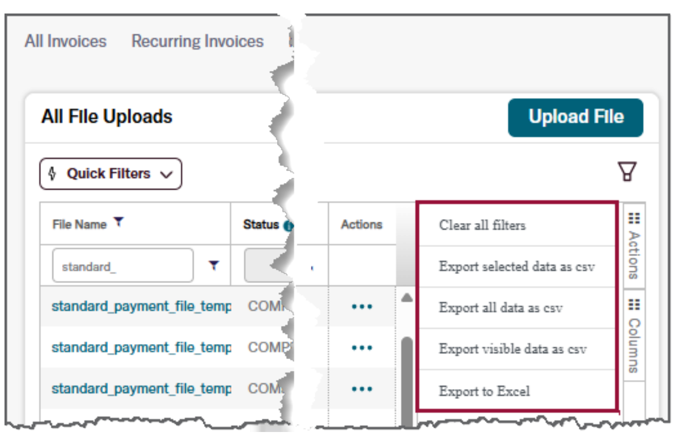
The **Actions** button **consolidates several grid-level tools into a single menu**. Selecting the **Actions** button opens an **Actions flyout**, where available options depend on the module and the user's permissions.

To use the Actions button and flyout:

1. Select the **Actions** button to open the **Actions** flyout.



2. Review the options that appear, such as clearing all filters from the grid or exporting data to a CSV file.



When exporting visible data to a CSV file, ensure the **grid's Items Per Page drop-down is set to display all items**. For example, if there are 60 items in the grid but only 50 are shown per page, adjust the **Items Per Page** drop-down accordingly.

3. Select the desired option.

Export Options

Export options in Corpay Complete determine **how and where data is delivered** when users export information from grids, module toolbars, or record details.

Depending on the export type and context, selecting an export option may result in an **immediate file download** or in the **creation of a report** that is made available in the **Reports** module. Immediate downloads typically provide a snapshot of the data visible at the time of export, while report-based exports are generated asynchronously and are intended for larger datasets or standardized reporting.

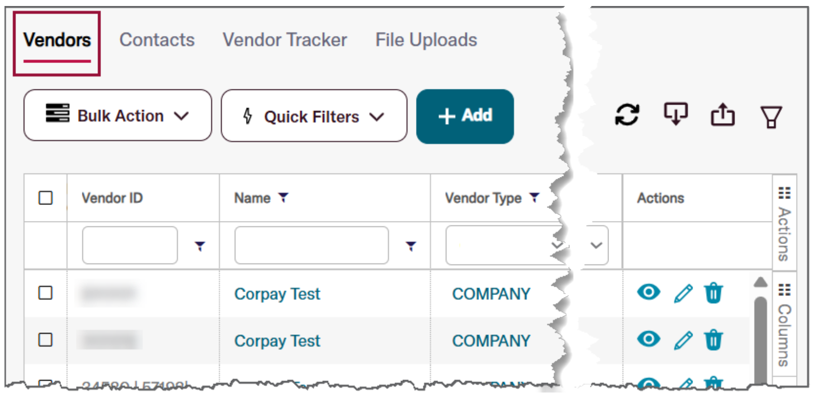
The sections below describe where export options appear and how they behave in specific contexts, such as grid-based exports, toolbar exports, and record-level document exports.

Grid Export Methods

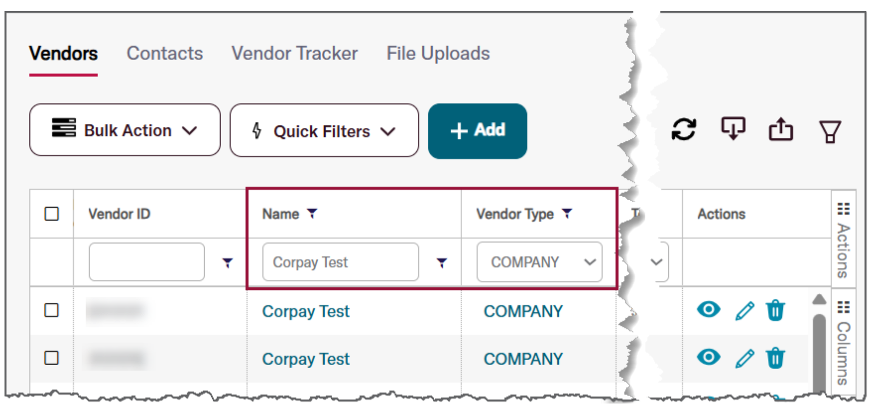
Grid-based exports allow users to **download data directly from a module grid** using the **Actions** button or **Column Editor**. These exports reflect the records and columns available in the grid at the time of export and are commonly used for operational review or quick analysis.

Export Data from a Grid

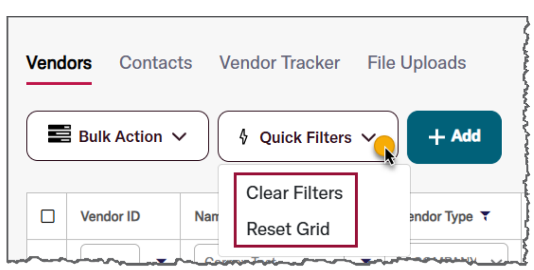
1. Navigate to module, such as **Invoices**, **Vendors**, or **Payments**.



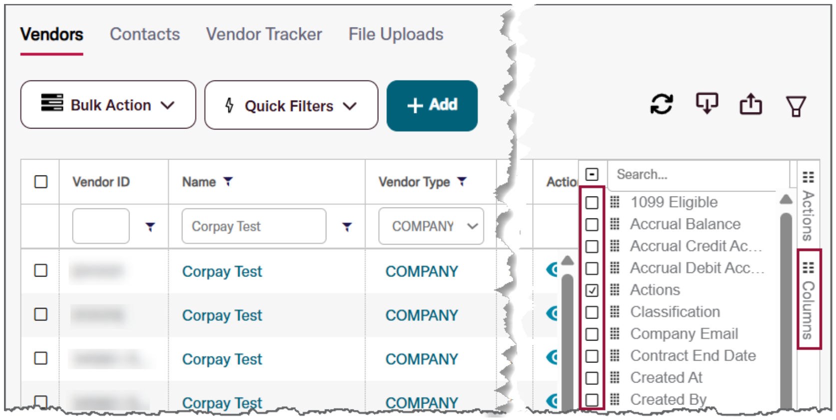
2. Adjust the grid as needed:
   - Apply or clear filters.
     - Apply filters



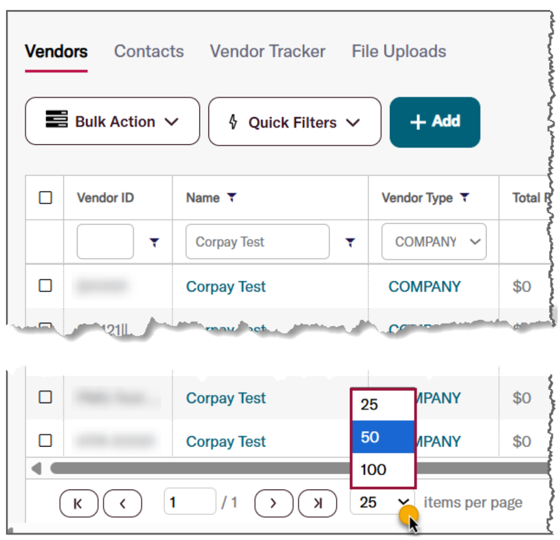
     - Clear filters



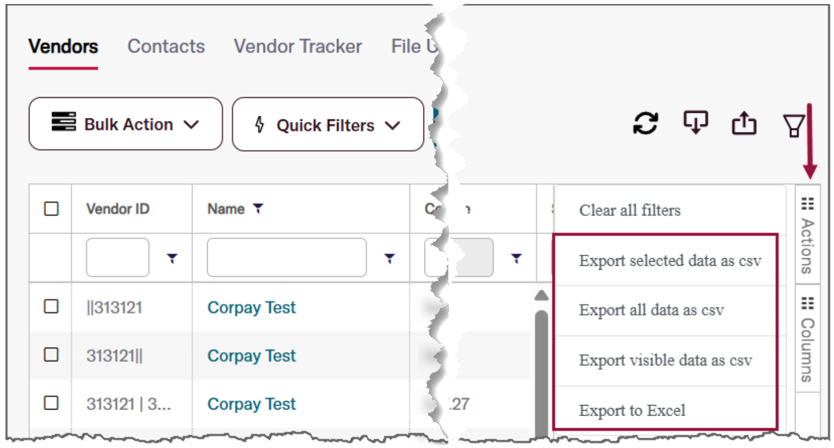
- Show or hide columns.



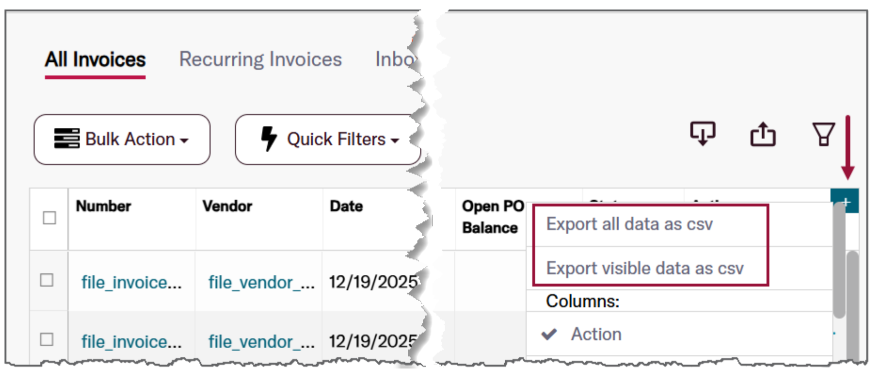
- Adjust amount of visible data using the **Items Per Page** drop-down if exporting visible data.



3. Open one of the grid export controls, which will vary depending on the grid that is accessed:
   - Click the **Actions** button and choose one of the following options:
     - Export selected data as csv
     - Export all data as csv
     - Export visible data as csv
     - Export to Excel



- Click the **Column Editor** and choose one of the following options:
  - Export all data as CSV
  - Export visible data as CSV



4. The CSV or Excel file will be downloaded automatically.

Grid Export Behavior

- **Export selected data as csv** downloads only the rows the user has selected.
- **Export all data as csv** includes all records and may include hidden columns.
- **Export visible data as csv** includes only the columns currently displayed and is affected by pagination.
- **Export to Excel** exports all data to an Excel file.
- **Active filters affect all grid exports** unless they are cleared.

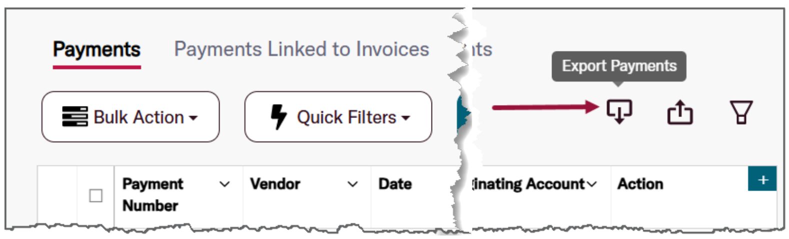
Module Toolbar Export Options

Some modules include export icons above the grid that provide quick access to commonly used datasets, such as **Export Vendors** or **Export Payments**.

Toolbar exports are optimized shortcuts and export behavior depends on the selected option and follows the same rules described in the **Export Options** section.

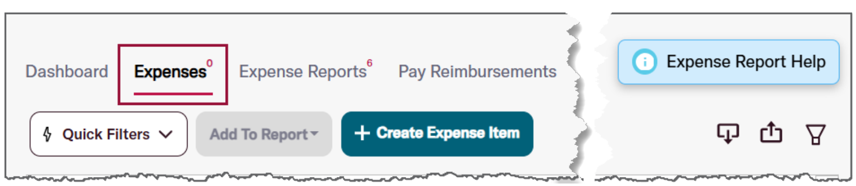
Where Toolbar Exports Appear

Toolbar exports appear at the top of the module page and are labeled based on the data being exported.

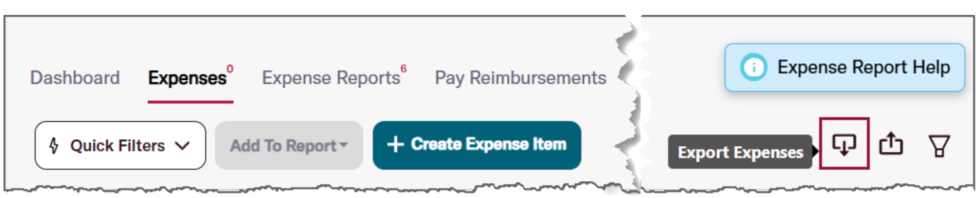


Use Toolbar Exports

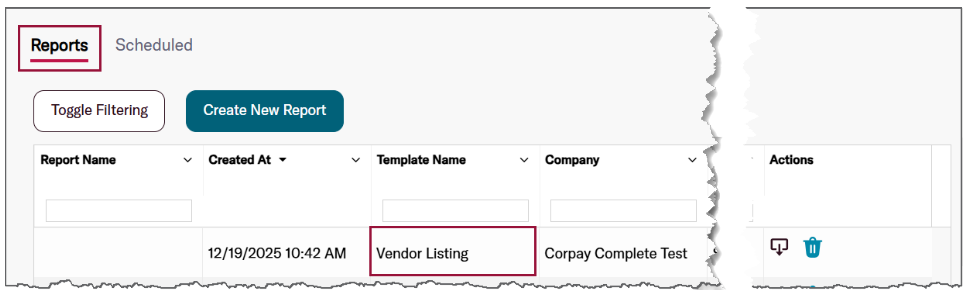
1. Open tab in a module that includes a toolbar export option, such as the **Vendors** tab, **Invoices** tab, **Cards** tab, or **Expenses** tab.



2. Select the **export icon** above the grid. In the following example, the **Export Expenses** icon is displayed.



3. The report or file will be downloaded automatically or be available in the **Reports** module. In the following example, the **Vendor Listing** report must be accessed from the **Reports** module.



Toolbar Export Behavior

- Some toolbar exports generate an immediate download.
- Others generate a report that appears in the **Reports** module.
- The behavior depends on the module and dataset complexity.

When an Export Creates a Report

In some cases, selecting an export option does not download a file immediately. Instead, Corpay Complete generates a report that is managed in the Reports module. This typically occurs when the dataset is large, when standardized formatting is required, or when the export is intended for reconciliation or audit purposes.

Refer to the **Reports module section** for detailed information about report workflows.

Document Export from Record Details

In addition to exporting data, many records in Corpay Complete include supporting documents such as invoices, receipts, remittance files, or other attachments. These documents are exported separately from data snapshots and reports.

Documents are accessed and downloaded from the **Documents** panel on a record's details page. Document exports are typically used when users need original files or supporting documentation for audits, Vendor inquiries, or internal review.

Refer to the **Documents Panel section** for additional details, including how to preview and download files.

Choosing the Appropriate Export Method

Use the following guidelines when selecting an export method:

- Use **grid exports** for quick, ad hoc data extraction.
- Use **toolbar exports** for standardized operational lists.
- Use the **Reports module** for structured, historical, or recurring reports.
- Use **document exports** when supporting files are required.

Export availability depends on user permissions and Company configuration.

Record-Level Tools

Record-level tools appear on the details pages of many records throughout Corpay Complete, such as the **Invoice Details**, **Payment Details**, **Expense Item Details**, and **Vendor Details** pages. These tools provide visibility into supporting documentation, system history, and activity related to a specific record.

Although the information shown may vary by record type, the **behavior and purpose of these tools are consistent** across the platform.

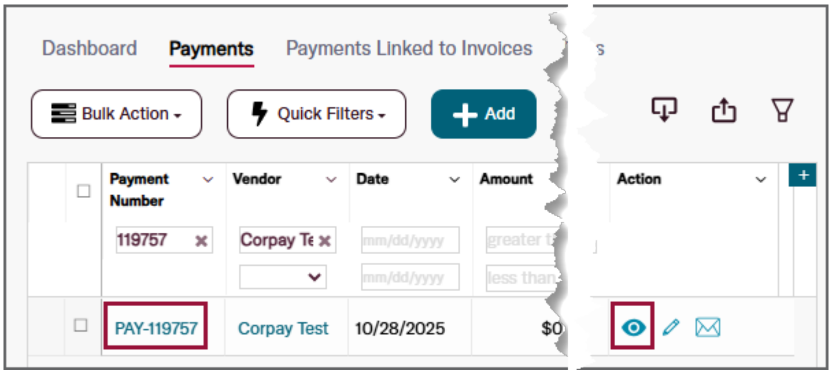
Documents Panel

The Documents panel provides a **centralized location for viewing and managing files associated with records** throughout Corpay Complete. While the types of documents and available actions may vary depending on the module and user role, the Documents panel functions consistently across the platform. Users can access related files directly from the associated record.

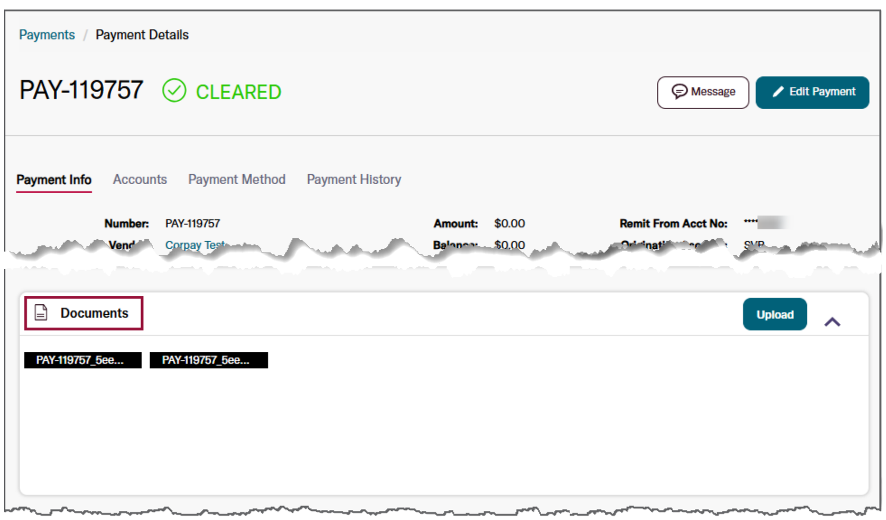
Documents uploaded or viewed in the Documents panel are **also available in the Documents module**, where users can access all documents uploaded to the platform.

Use the Documents Panel

1. Open a record’s details page by clicking the item **Number** or **Name**, or the **View** icon in the **Action** column.



2. Locate the **Documents** panel toward the bottom of the page.



3. In the **Documents** panel, choose one of the following options:

The action icons in the Documents panel **may vary depending on where it is accessed** but the functionality remains the same.

A. **Upload** – Click the **Upload** button to open the **Upload Files** dialog where users can **upload any relevant documentation**, such as receipts or proof of service.

B. **File Attachment Preview** – Click the **document thumbnail** to open the **File Attachment Preview** dialog, where users can **view**, **print**, and **download** the document.

C. **Download** – Hover over the document and click the **Download** icon to **view and download** a copy of the document.

D. **Delete** – Hover over the document and click the **Delete** icon to **delete the document**.

The documents available depend on the type of record and the workflow used to create or attach the file.

Documents Panel Behavior

- Documents are tied to the specific record
- Downloading a document does not modify the record or its status.
- Some documents are system-generated, while others are user- or Vendor-uploaded.
- Not all record detail pages include a Documents panel.

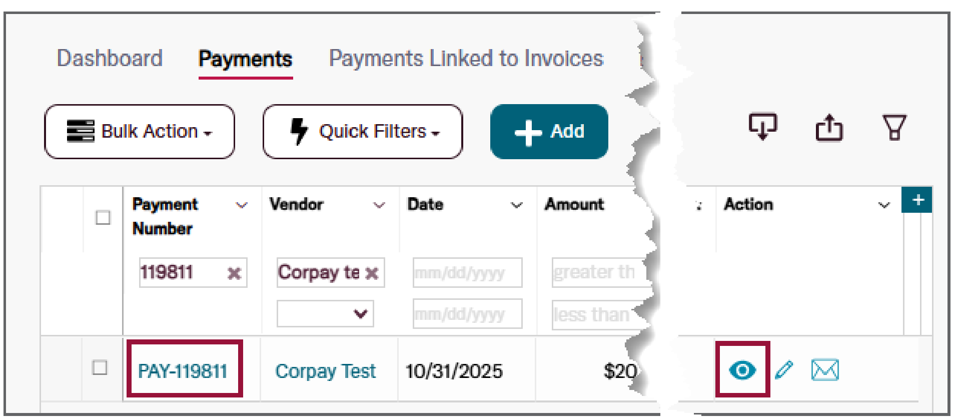
Data Audit Log

The Data Audit Log provides a detailed, chronological history of changes made to a record in Corpay Complete. It shows **what changed**, **when the change occurred**, and **how the change was made**. This tool supports audit review, troubleshooting, and compliance by making record changes transparent and traceable.

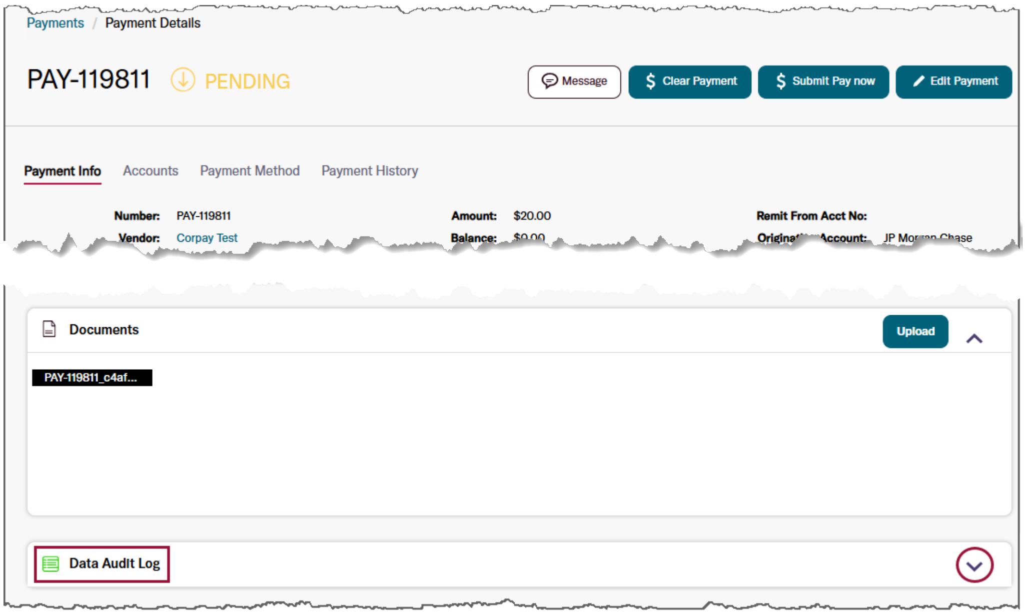
The Data Audit Log focuses on **data-level changes**, not workflow context. It is most useful when users need to verify updates to specific fields, confirm the source of a change, or understand how a record evolved over time.

Use the Data Audit Log

1. Open the record's details page by clicking the item **Name** or **Number**, or the **View** icon in the **Action** column.



2. Scroll down to the **Data Audit Log** and click the **expand** icon to open it.



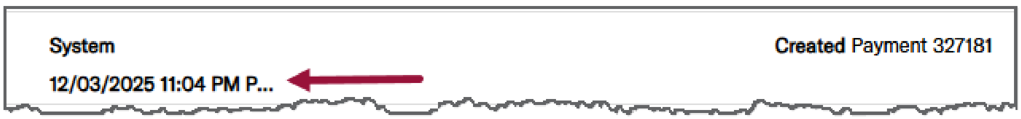
3. Review entries in **reverse chronological order**. This means the most recent updates appear at the top of the list while the oldest updates appear at the bottom of the list.

The information displayed in the Data Audit Log varies by record type and reflects changes made throughout the record's lifecycle.

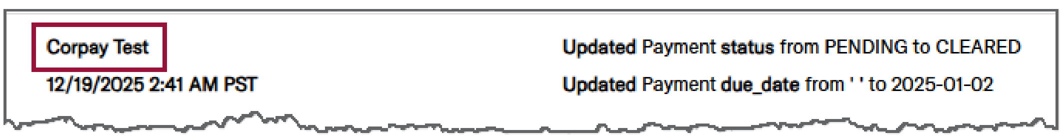
Data Audit Log Entry Details

Each entry in the Data Audit Log represents a **discrete change event**. While the fields displayed vary by record type, audit entries commonly include:

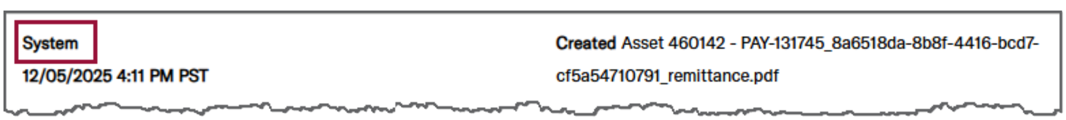
- **Timestamp:** The **date and time** when the change occurred.



- **Change Source:** Indicates **how the change was made**. This may reflect:
  - a **user action**,

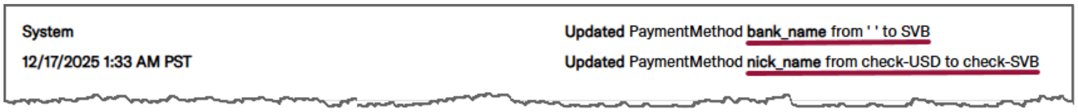


  - a **system-generated update**,

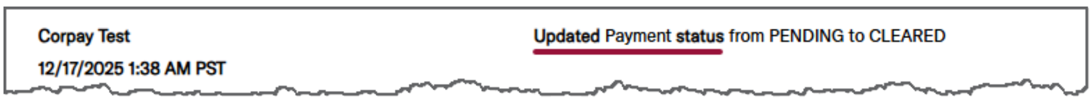


  - an **integration** or **synchronization process**.

- **Field-Level Changes:** These changes show which **fields were updated** and **how their values changed**, often displayed as a previous value and a new value.



- **Action Type:** Describes the **type of update**, such as creation, modification, status change, or system update.



Not all audit entries display every field listed above. The level of detail **depends on the record type** and the **nature of the change**.

How to Interpret Common Audit Log Scenarios

Users may encounter audit entries that reflect different types of activity, including:

- **User-Initiated Changes:** Updates made directly by a user, such as editing a record, changing a status, or updating a field value.
- **System-Generated Updates:** Automatic changes performed by Corpay Complete, such as status transitions, background processing, or validation updates.
- **Integration or Sync Events:** Changes triggered by ERP integrations or file-based processes that update record data programmatically.

Understanding the change source helps users distinguish between manual updates and automated system behavior.

Data Audit Log Behavior

Users should keep the following points in mind when reviewing the Data Audit Log:

- Audit log entries cannot be edited, removed, or hidden.
- The Data Audit Log reflects **data changes only** and does not explain why a workflow action occurred.
- The log does not replace workflow history, which is typically summarized in the **Activities** panel.

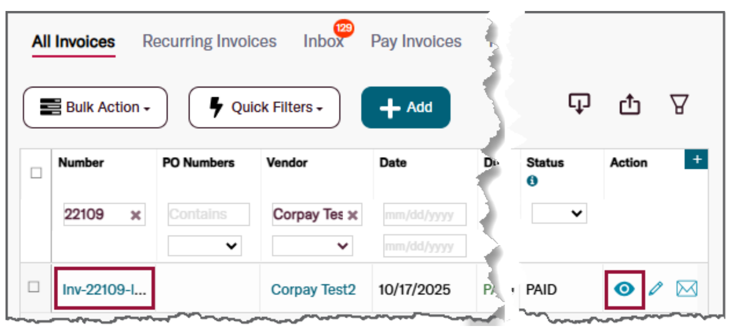
Activities Panel

The Activities panel provides a **chronological, event-focused history of system activity** related to the invoice. It highlights integration and processing events, such as ERP synchronization attempts, integration runs, and system updates that occur as the invoice moves through automated workflows.

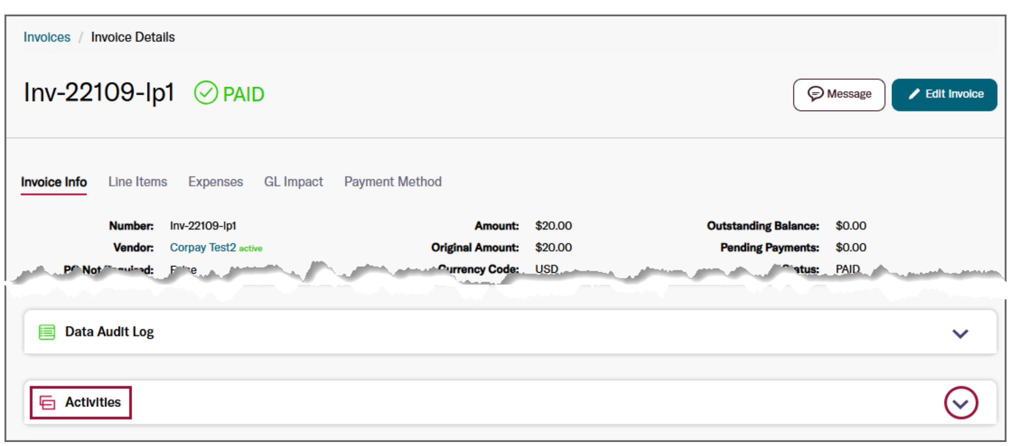
This panel is intended to help users understand **what system actions occurred and when**, particularly when reviewing synchronization behavior or investigating integration issues. The most recent activity appears at the top of the panel, and users can select an entry to view additional details when available.

Access the Activities Panel

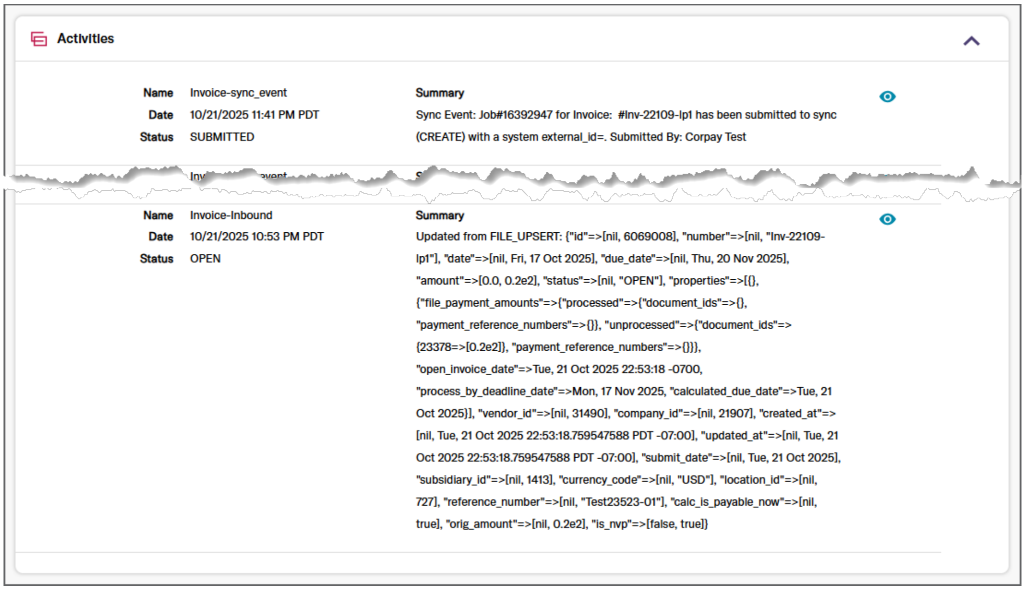
1. Open the record's details page by clicking the item **Name** or **Number**, or the **View** icon in the Action column.



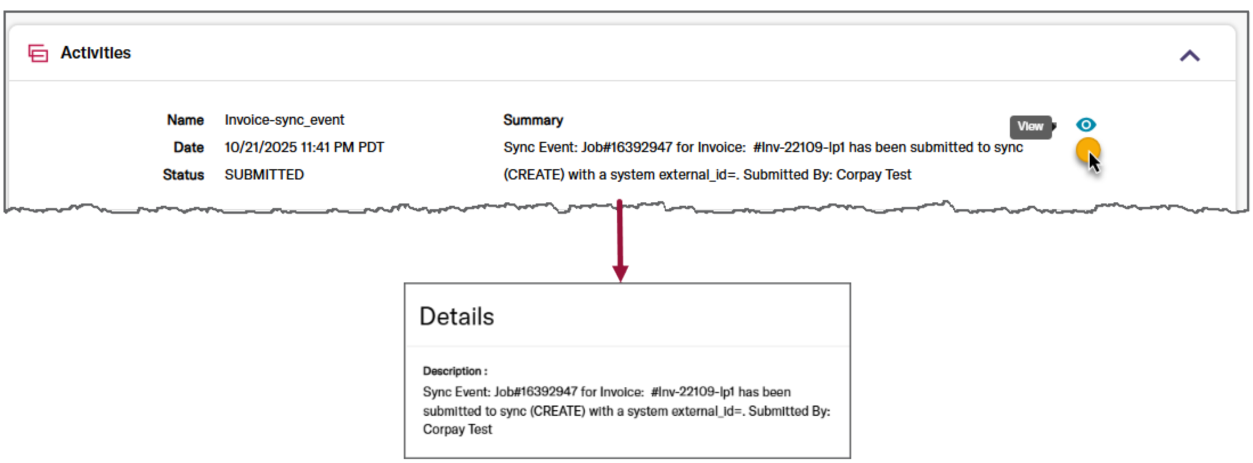
2. Scroll down to the **Activities** panel and click the **expand** icon.



3. Review entries in **reverse chronological order**. This means the most recent updates appear at the top of the list while the oldest updates appear at the bottom of the list.



4. Click the **View** icon to open the **Details** dialog.

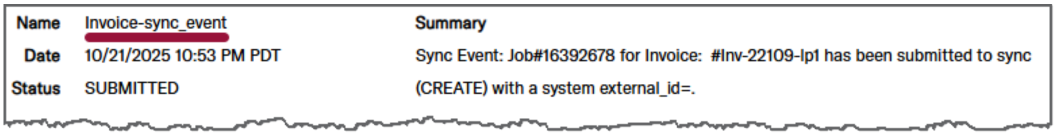


Activity Entry Details

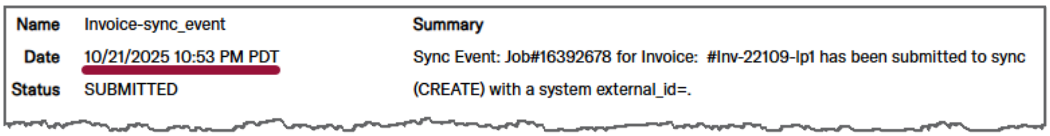
Each entry in the Activities panel represents an **event that occurred during the record's lifecycle**. Depending on the event type, an activity entry may include both **summary information** and **specific data references**.

Common elements of an activity entry include:

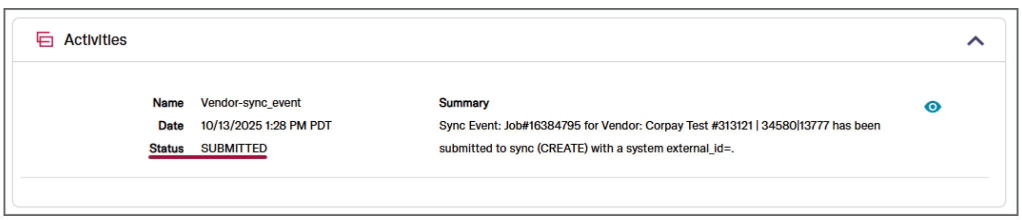
- **Event Name or Type:** Identifies the **type of activity**, such as a sync event or system process. In the following example, an invoice sync event is shown.



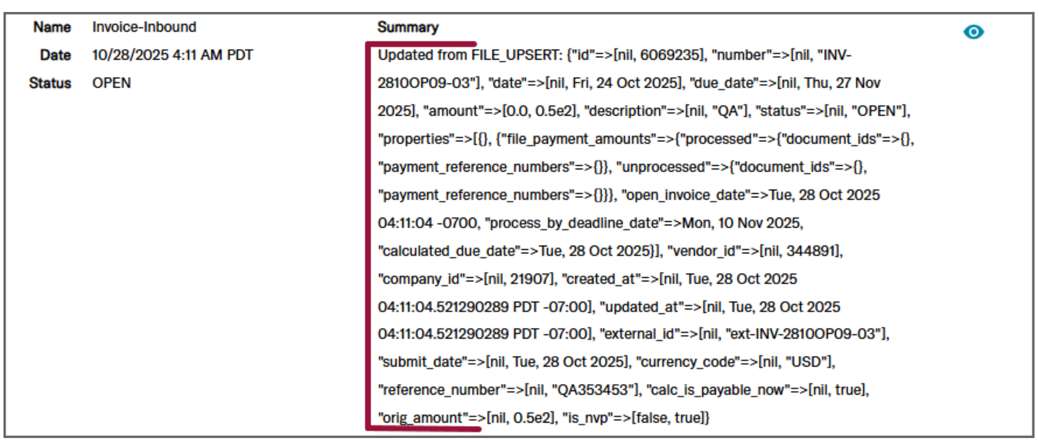
- **Date and Time:** Indicates **when the event** occurred.



- **Status or Outcome:** Shows the **result of the event**, such as Submitted.



- **Summary:** Provides an **explanation of what occurred**. In some cases, this summary may reference specific field values, statuses, or identifiers involved in the event.

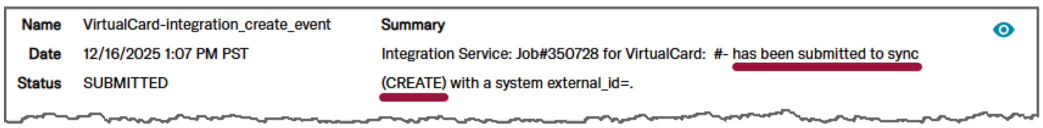


Unlike the Data Audit Log, the Activities Panel presents this information in a **narrative, event-based format**, making it easier to understand the sequence and impact of changes.

Common Types of Activities Users May See

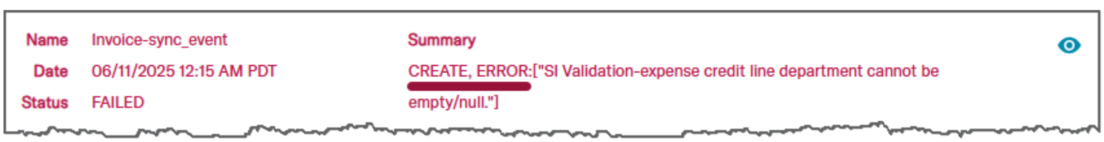
Across modules, users commonly encounter activities such as:

- **Creation and Intake Events:** These events indicate when a record was created and how it originated, such as from an ERP integration, OCR process, or manual entry.

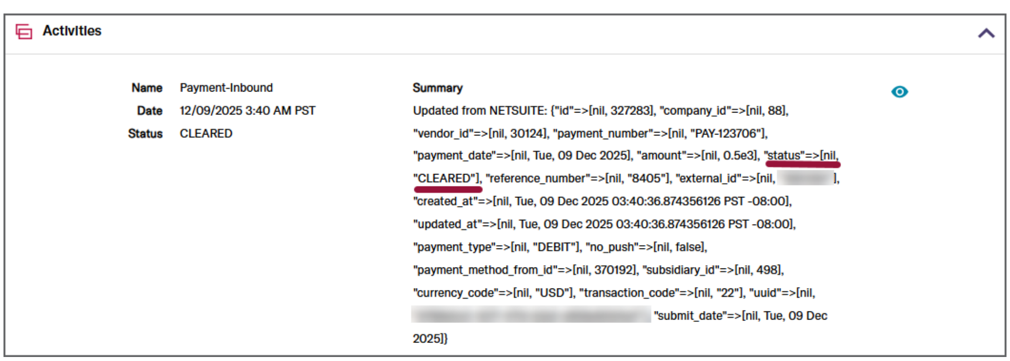


- **Integration and Sync Events:** These events reflect ERP synchronization attempts, successful syncs, or failed syncs. These entries often include summary messages that reference the affected fields or error conditions.

  In the following example, a sync error occurred because the expense credit line Department field was blank.



- **Payment and Processing Events:** These events indicate when payments were created, processed, linked, or completed, including status transitions such as Open to Paid.



- **System-Generated Updates:** These events capture automated actions performed by Corpay Complete that affect the record's lifecycle.

How the Activities Panel Differs from the Data Audit Log

The Activities panel and Data Audit Log overlap in purpose but differ in focus and presentation:

- The **Activities** panel emphasizes **events and outcomes**. It may reference field values or status changes, but it presents them in a summarized way.
- The **Data Audit Log** emphasizes **data change detail**. It provides a field-by-field record of updates, often showing previous and new values without narrative context.

When to Use the Activities Panel

The Activities panel is most useful when users need to:

- understand the progression of a record through creation or processing,
- confirm that a key event occurred, such as a sync or payment,
- identify where an issue may have occurred in the workflow,
- review summarized history before investigating deeper data changes.

For detailed verification of individual field updates, users should refer to the **Data Audit Log**.

Notifications and Messages

Notifications and Messages are platform-wide features that help users **stay aware of activity and communicate directly** within Corpay Complete. Notifications **alert users when records they are involved with change or require attention**, while Messages allow **users to communicate about those records** without leaving the platform. Both features are embedded throughout Corpay Complete and are closely tied to records, approvals, and workflows rather than to individual modules. The sections below explain how to access, review, and use Notifications and Messages during day-to-day work.

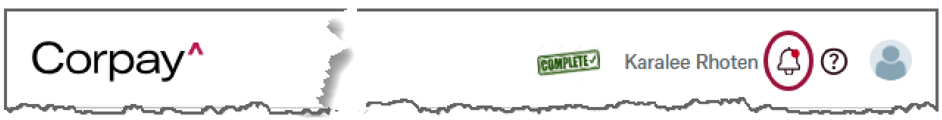
Notifications

Notifications help users stay informed about activity that requires their attention across Corpay Complete. These alerts highlight updates to records, approvals, and tasks that are assigned to the user, making it easier to identify what is new, what has already been reviewed, and what may still require action. By managing notifications regularly, users can more efficiently track progress and avoid overlooking important updates tied to their responsibilities.

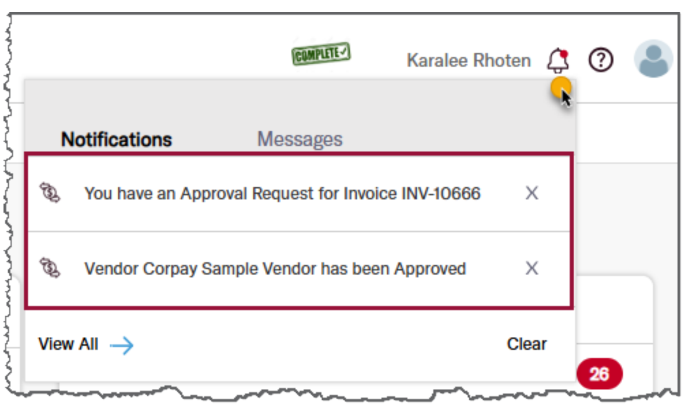
View Notifications

To view notifications:

1. Select the **Notifications** icon in the upper-right corner of the platform. A red dot next to the **Notifications** icon indicates that there are new notifications to view.

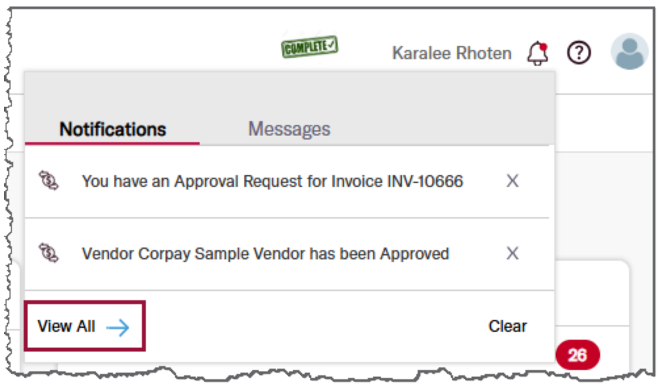


2. The **Notifications** panel opens and displays recent notifications. The initial view displays a limited set of the most recent notifications.

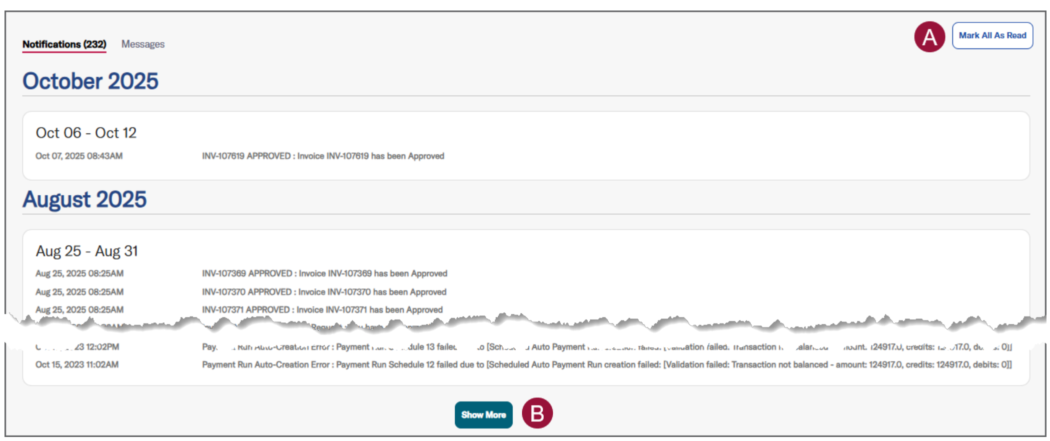


3. Review the list of notifications.

4. If additional notifications exist or no notifications are displayed, select **View All** to open the **Notifications** tab on the **Notifications and Messages** page, where all notifications are displayed.



5. On the **Notifications** tab on the **Notifications and Messages** page, choose from the following options:



A. **Mark All As Read:** Click this button to **mark all notifications as read**.

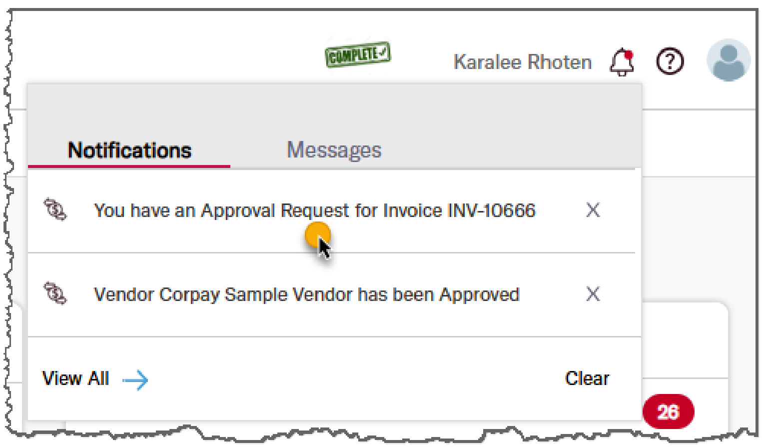
Notifications display an **unread** state to indicate new or recently updated activity that the user has not yet reviewed. Marking a notification as **read** helps users visually track which updates they have acknowledged, but it does not indicate that any action has been completed or that a task has been resolved.

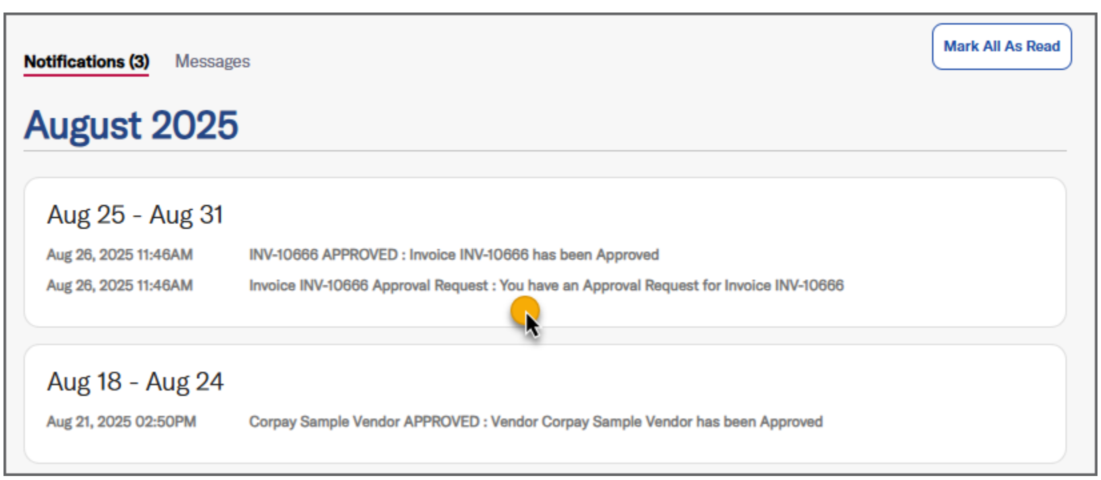
B. **Show More:** Click this button to **see additional notifications** on the **Notifications** tab. This button may not display if all notifications fit on one page.

Open Notifications

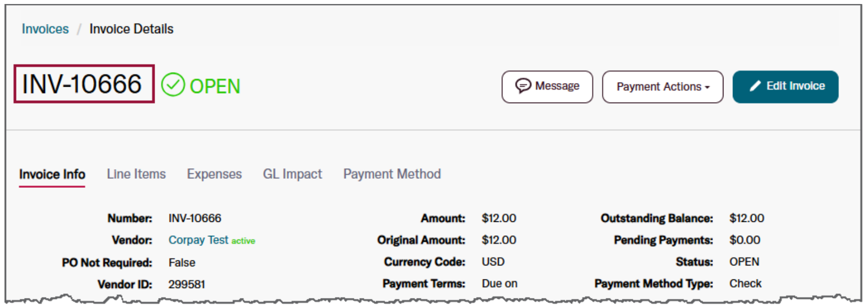
To open a notification:

1. Select a notification from the **Notifications** panel or **Notifications** tab on the **Notifications and Messages** page to open the associated record.



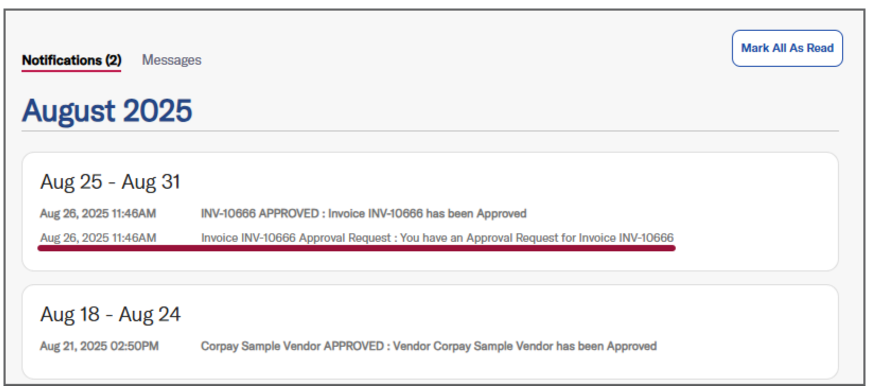


2. Review the record details. From the record, users may take the next appropriate action, such as approving an item, reviewing changes, or confirming the item's status.

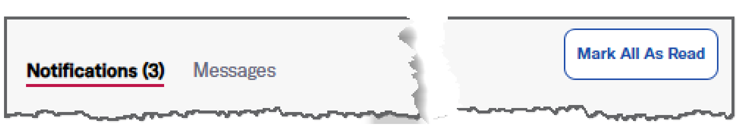


3. On the **Notifications** tab, the following actions will occur:

- The notification will no longer be bold, indicating that it has been read or addressed.



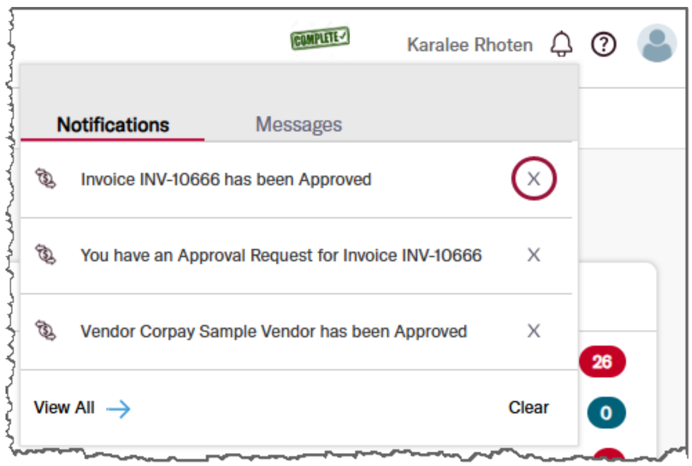
- The **Notifications count** will update to reflect how many unread notifications remain.



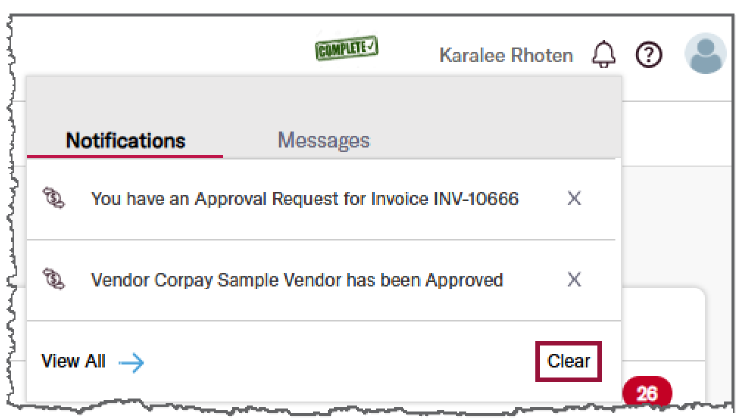
Manage Notifications

Notifications indicate updates or activity that may require review or action. Managing notifications helps users keep track of which items have already been reviewed and which may still need attention. The following options allow users to manage notifications from either the **Notifications** panel or the **Notifications and Messages** page.

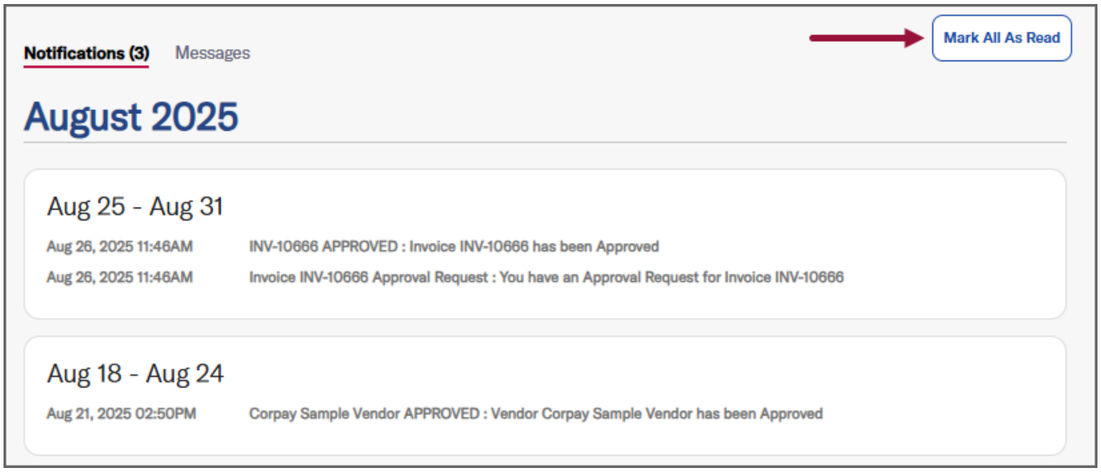
1. To clear a **single notification** from the **Notifications** panel after reviewing or acting on it, select the **X** icon on the notification. This action removes only that notification and allows other unread notifications to remain visible.



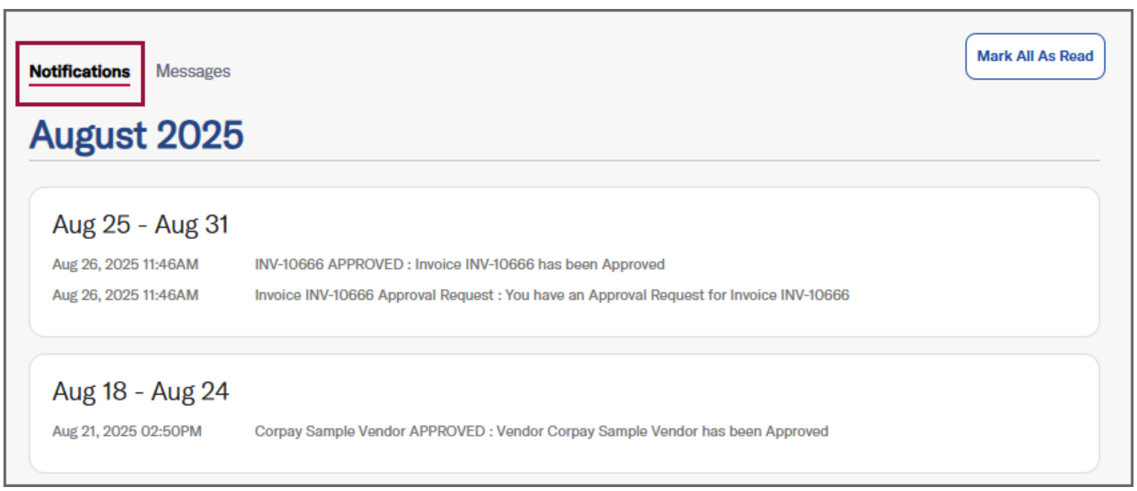
2. To clear **all unread notifications currently shown in the Notifications** panel, select **Clear**. This action removes all unread notifications from the panel at once and is useful when all notifications have been addressed.



3. To acknowledge notifications without removing them, select **Mark All As Read** on the **Notifications** tab on the **Notifications and Messages** page.



4. This action changes all notifications from **unread to read** and the **Notifications count** will be updated to reflect that all notifications have been reviewed. This action makes it easier to distinguish between new activity and items that have already been reviewed while keeping the full notification history visible.



5. Use these options to maintain clarity and visibility:
   - The **X** icon is best for dismissing individual notifications that have been handled.
   - **Clear** is best for resetting the Notifications panel once all listed items have been addressed.
   - **Mark All As Read** is best for confirming review of notifications while preserving them for reference.

Notifications are generated automatically based on user role, responsibility, and authorization. Users receive notifications only for records and actions they are permitted to access. Depending on user preferences and Company configuration, notifications may also be delivered by email. Notification preferences are managed from the User Profile menu.

Messages

The **Messages** feature allows users to **communicate directly with other users or Vendors within the context of specific records** in Corpay Complete. Messages are associated with the record from which they are sent, such as an invoice, payment, purchase order, or Vendor, ensuring that conversations remain tied to related activity and can be reviewed alongside the full history of that record. This provides a centralized and auditable way to collaborate without relying on external email or separate messaging tools.

Internal Chat Versus Vendor Chat

The **Messages** panel on an item details page includes two distinct tabs: **Internal Chat** and **Vendor Chat**, each serving a different communication purpose. **Internal Chat** is used for internal collaboration and allows users to send messages to other employees within their Company about the specific record, such as an invoice, payment, or purchase order. These messages are visible only to internal users and are intended for coordination, questions, or internal review.

Vendor Chat, by contrast, is used for external communication with Vendors. Messages sent from the Vendor Chat tab are delivered to the Vendor and appear in the Vendor Portal, allowing Vendors to respond directly within Corpay Complete. This tab should be used when requesting information from a Vendor, clarifying invoice details, or responding to Vendor inquiries related to the record.

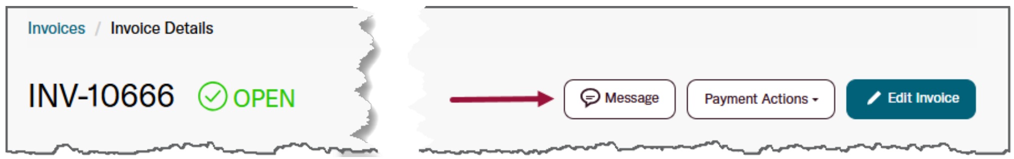
Both chat types are tied to the specific record where the message is sent, ensuring that all related communication remains centralized and accessible in the context of that item.

Access Messages

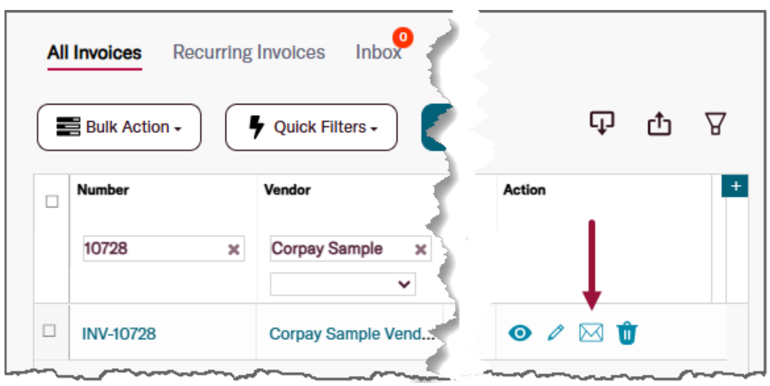
Messages can be accessed from multiple locations throughout Corpay Complete, depending on whether users want to **view messages across records** or **open messages for a specific record**.

Messages can be accessed from the following locations:

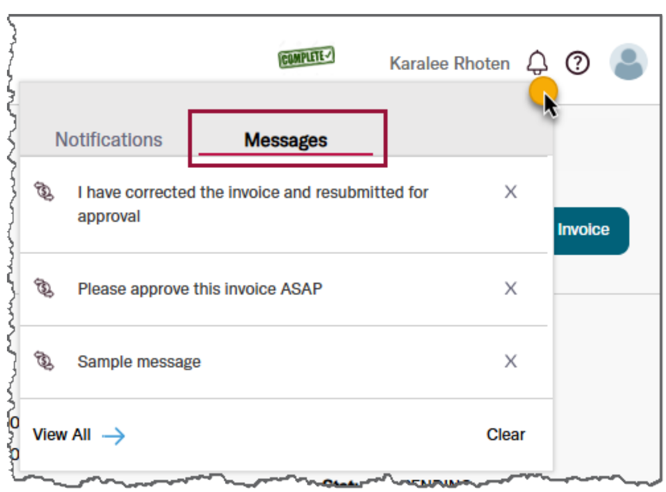
- The **Message** button on a **record's details page**, which opens messages for that specific record.



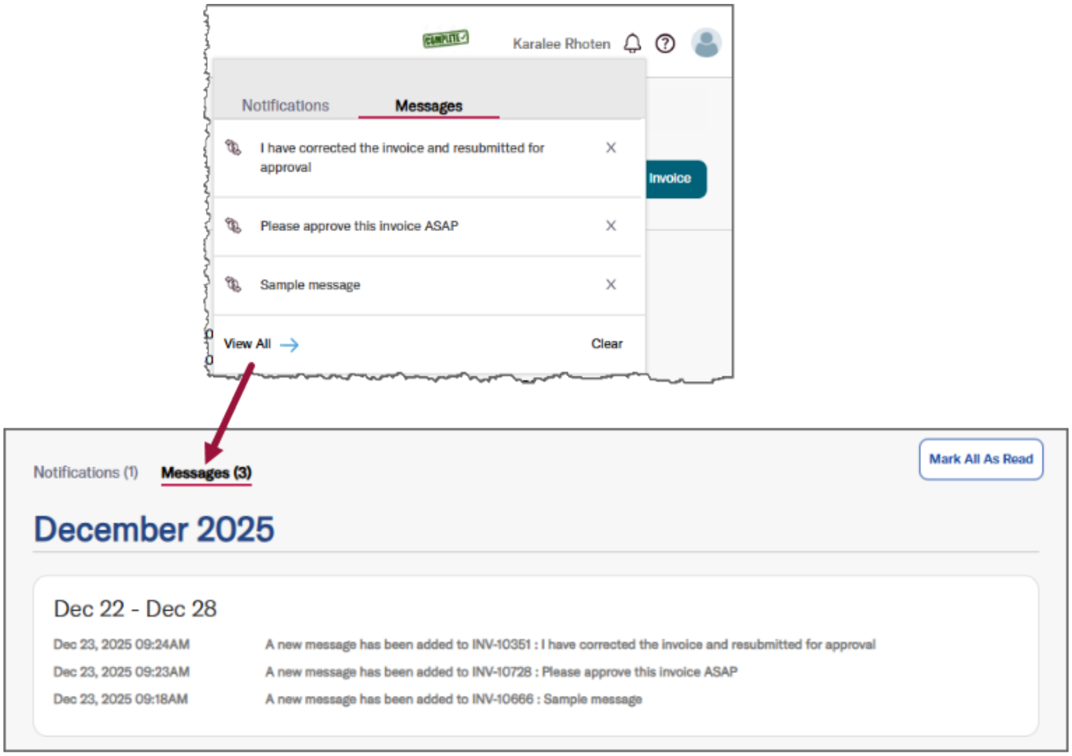
- The **Message** icon in the **Action** column of most grids, which opens messages for the selected record directly from the grid. This icon is not available in all grids.



- The **Messages** tab under the **Notifications** icon, which displays recent message activity across records.



- The **Messages** tab on the **Notifications and Messages** page, accessed by clicking **View All** from the **Messages** tab. This is where users can review all messages to which they have access.



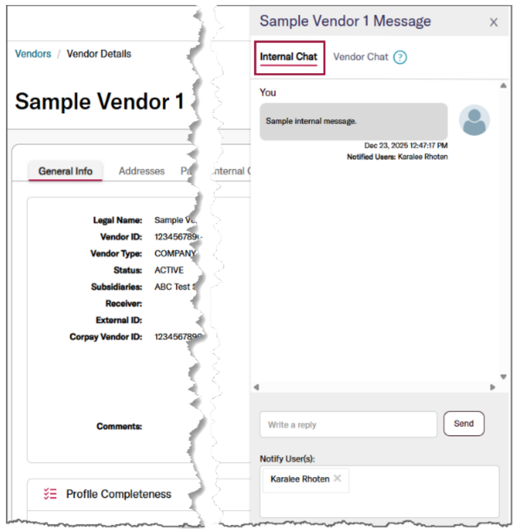
Send a Message

Messages are sent from a record's details page and are always associated with the specific record from which they are created. Once sent, messages become part of the record's message history and are visible to users with access to that record.

1. From a record's details page, users can open the **Messages** panel by selecting the **Message** button.

2. In the **Messages** panel, click the appropriate tab:

   A. **Internal Chat** is used to send a message to **other users in the Company**.



   B. **Vendor Chat** is used to send a message to a Vendor or respond to a Vendor message, when Vendor messaging is enabled.

Vendor Chat is available only when **the Vendor Portal is enabled**. If the Vendor Portal is not in use, Vendor Chat functionality does not apply

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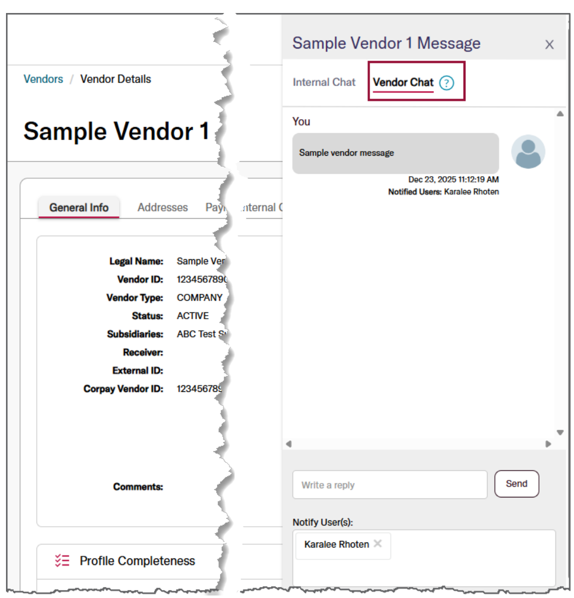
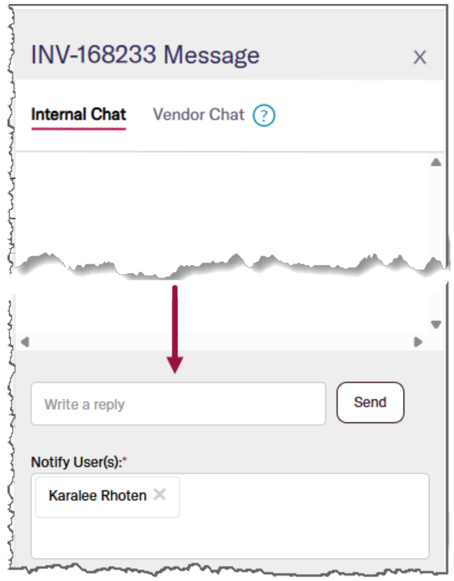
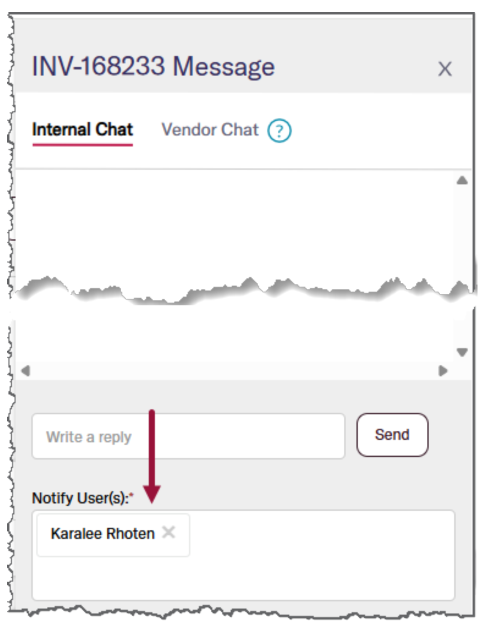


3. Key in the message in the **Write a reply** field.

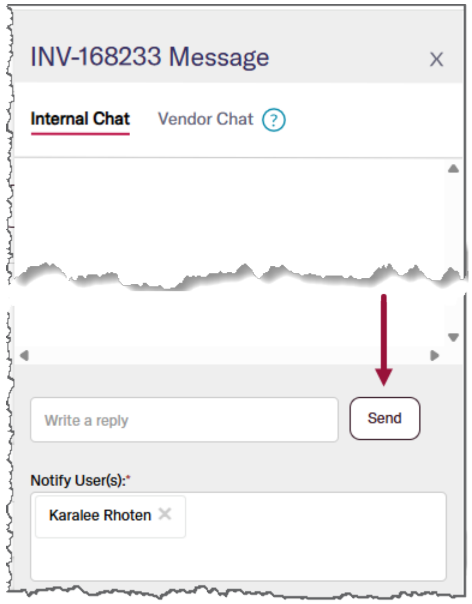


4. In the **Notify User(s)** field, select one or more users to notify.

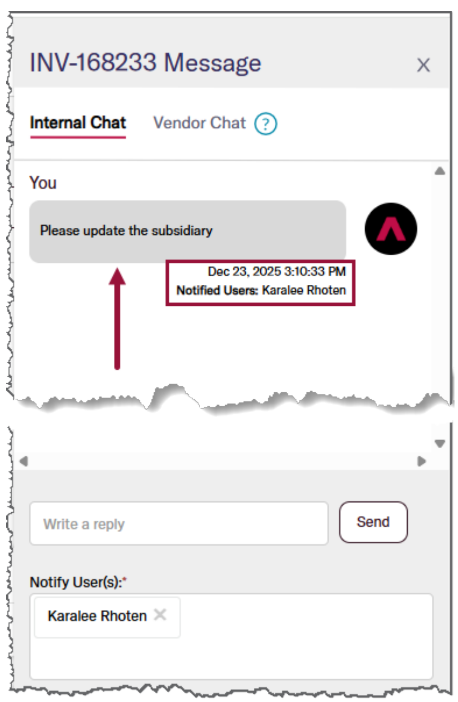
    - Only users selected in this field **receive a message notification**.
    - If **no users are selected**, the message is still added to the record.
    - **Users with Admin roles receive notifications even if no users are selected**.



5. Click the **Send** button.

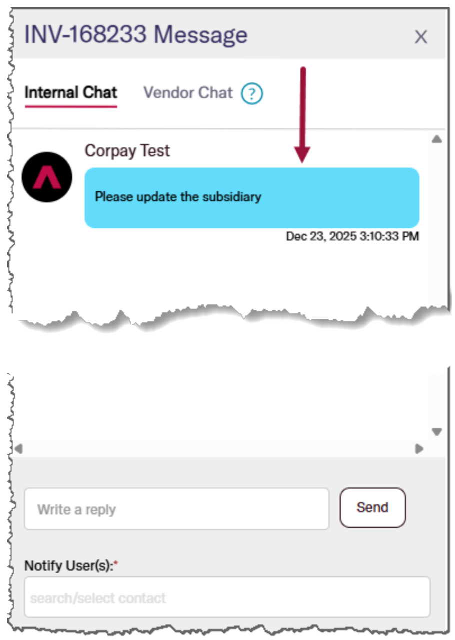


6. The message will be added to the record's message history.



7. After a message is sent, it appears in the message thread for users who sent the message or were included in the **Notify User(s)** field. If the message was sent by another user, it also appears as a new message alert the next time a notified user logs in to Corpay Complete. The message display varies slightly depending on whether the message was sent by the logged-in user or received from another user.

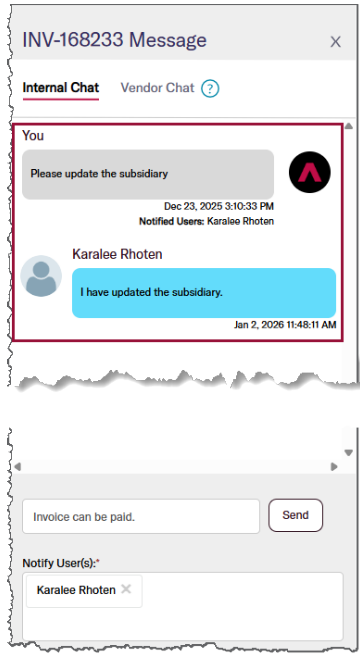
   The following example shows how messages display when viewed by the user.



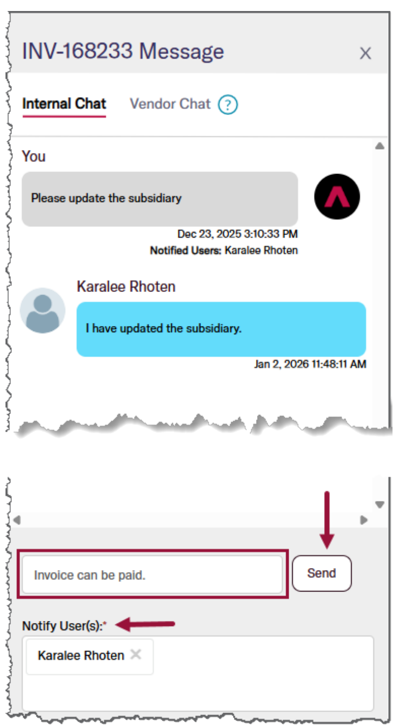
Read and Respond to Messages

When the Messages panel is open, users can review messages associated with the record and follow the conversation history in context.

1. Review existing messages in the order displayed.



2. If follow-up is required, key in a reply in the **Write a reply** field, select the user to notify in the **Notify User(s)** field, and click the **Send** button.

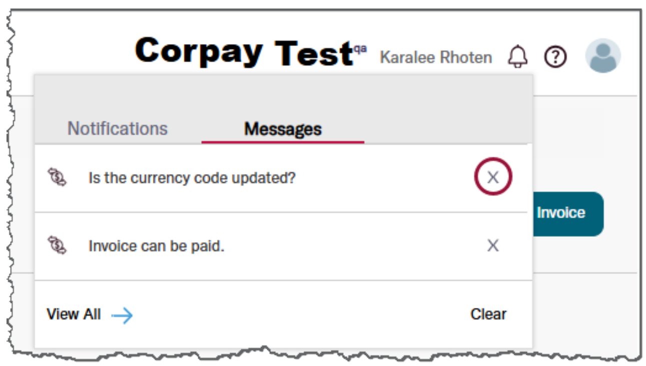


3. Replies remain part of the same message history and are visible to users with access to the record.

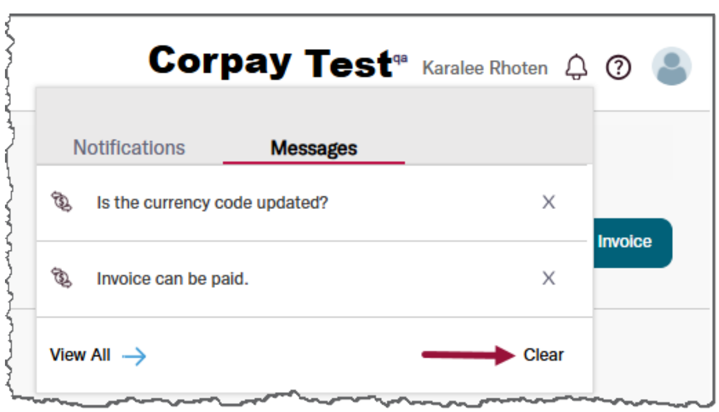
Manage Messages

Managing messages helps users keep track of conversations they have already reviewed while maintaining visibility into new or unread messages. The options described below allow users to acknowledge, clear, or review message alerts without removing message history from the associated record.

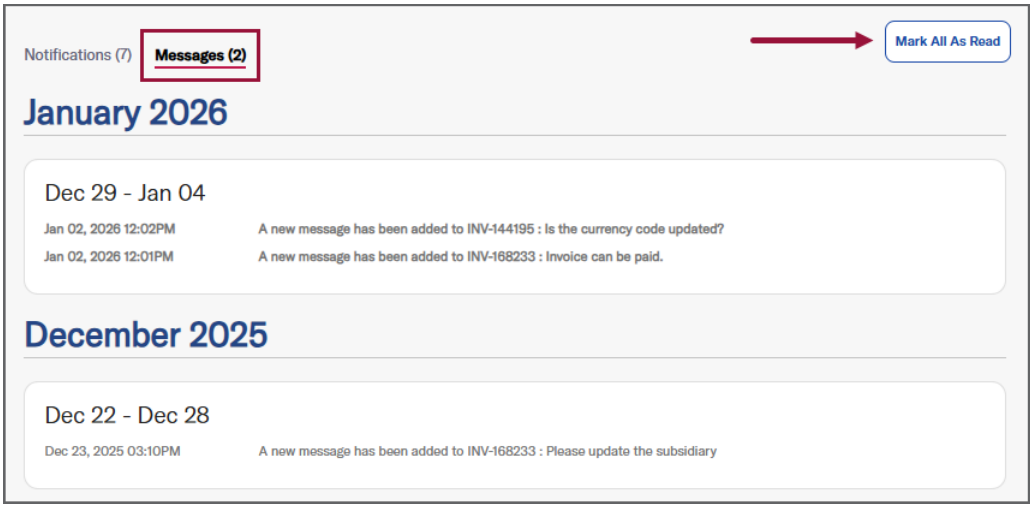
1. To clear a **single message** from the **Messages** panel after reviewing or acting on it, select the **X** icon on the notification. This action removes only that message and allows other unread messages to remain visible.



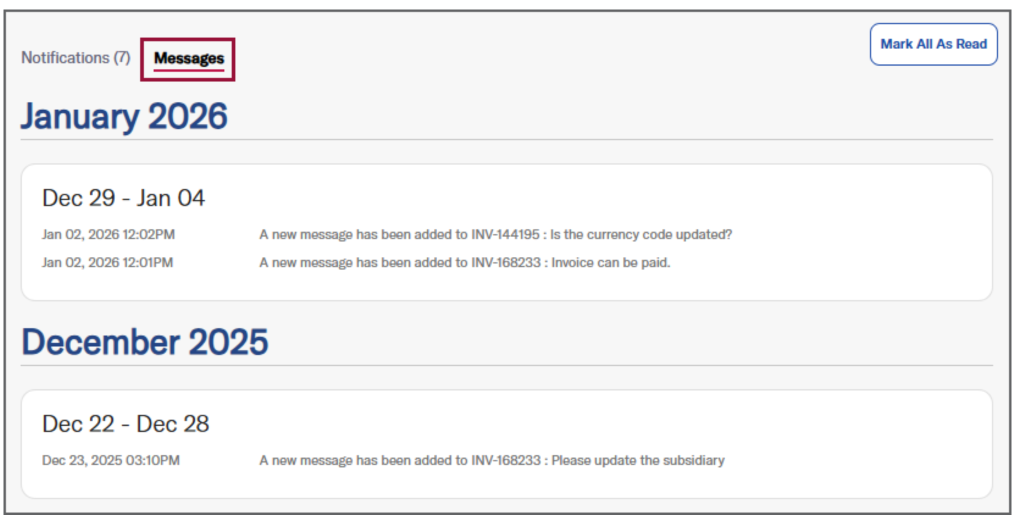
2. To clear **all unread messages currently shown in the Messages** panel, select **Clear**. This action removes all unread messages from the panel at once and is useful when all messages have been addressed.



3. To acknowledge messages without removing them, select **Mark All As Read** on the **Messages** tab on the **Notifications and Messages** page.



4. This action changes all messages from **unread to read** and the **Messages count** will be updated to reflect that all messages have been reviewed. This action makes it easier to distinguish between new activity and items that have already been reviewed while keeping the full message history visible.



5. Use these options to maintain clarity and visibility:
   - The **X** icon is best for dismissing individual messages that have been handled.
   - **Clear** is best for clearing the **Messages** panel once all items have been addressed.
   - **Mark All As Read** is best for confirming review of messages while preserving them for reference.

When a message is sent and users are notified, those users receive an in-platform alert and, depending on notification settings, may also receive an email notification.

Messages may support internal communication only or include communication with Vendors, depending on Company configuration and user role. Message availability and recipient options vary, but the process for viewing, sending, and responding to messages remains consistent across Corpay Complete.

Corpay Complete Modules

The following section provides high-level overviews of the primary modules within Corpay Complete. Each overview explains the purpose of the module, the types of activities users can expect to perform, and how the module fits into the broader financial workflow. These summaries are intended to give users foundational context before they begin working within specific areas of Corpay Complete.

Users seeking details, module-specific procedures or workflow instructions should refer to the resources available in the **Corpay Complete Knowledge Base**. The Knowledge Base contains user guides and articles that provide deeper guidance for working within individual modules.

Main Dashboard

The Main Dashboard is the default landing page when users log in to Corpay Complete. It provides a consolidated view of activity across the platform and highlights items that may require attention. Rather than serving as a workspace for completing tasks, the Main Dashboard is designed to help users quickly assess priorities and navigate to the appropriate modules to take action.

The information displayed on the Main Dashboard depends on Company configuration, enabled features, and user permissions. As a result, not all users will see the same panels or data.

Dashboard Module Structure

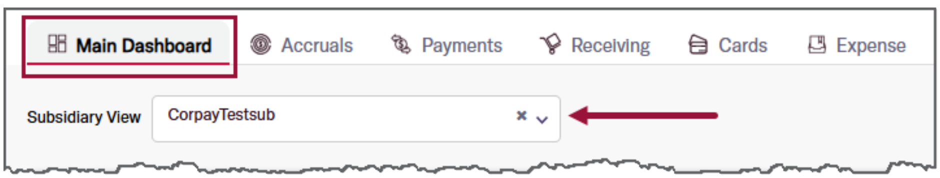
The **Dashboard** module may include multiple tabs, one of which is the **Main Dashboard** tab described in this section. Additional tabs may appear within the Dashboard module, such as **Payments**, **Cards**, or **Expenses**.

These additional tabs provide focused summary views related to specific modules. The availability of Dashboard module tabs depends on Company configuration and user permissions. Not all users will see the same tabs, and some Companies may only display the Main Dashboard tab.

Unless otherwise specified, references to the Main Dashboard in this guide apply specifically to the **Main Dashboard tab**, not to other tabs that may appear within the Dashboard module.

Subsidiary View

For Companies that use multiple subsidiaries, the Main Dashboard includes a **Subsidiary View** drop-down. This control allows users to filter Main Dashboard data by subsidiary.



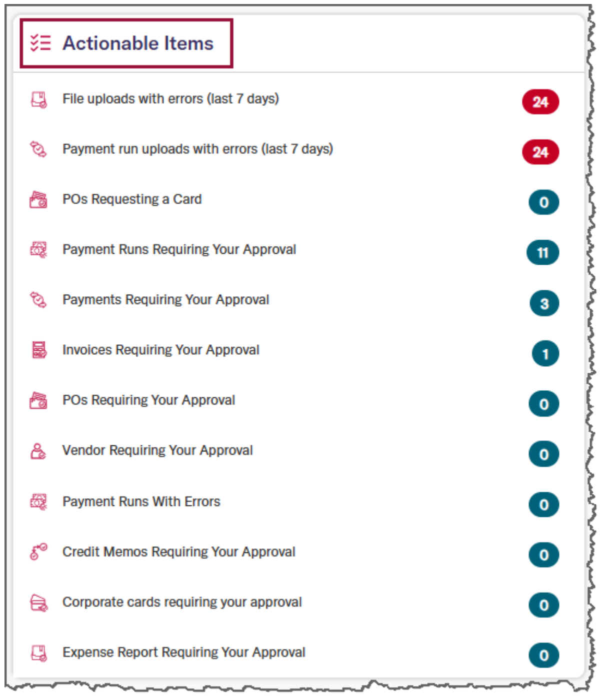
When a subsidiary is selected, the following sections update to reflect data for that subsidiary only:

- **Actionable Items**
- **Payment Actions Required Today**
- **Top 5 Purchase Orders**
- **Stats**

Changing the Subsidiary View **does not switch the active Company instance**. It only adjusts which subsidiary's data is summarized on the Main Dashboard.

Actionable Items

The **Actionable Items** panel highlights **records that require user attention** based on Company configuration and user role. This panel appears for Companies that have Invoice Automation or Payment Automation enabled.



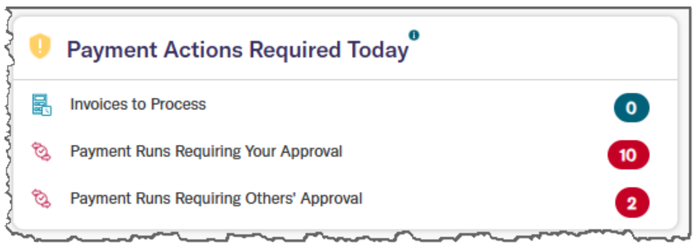
Depending on configuration, the panel may include items such as:

- File Uploads with Errors
- File Uploads Payment Runs with Errors
- Payment Runs with Errors
- POs Requesting a Card
- POs Requiring Your Approval
- Invoices Requiring Your Approval
- Payments Requiring Your Approval
- Vendors Requiring Your Approval
- Payment Runs Requiring Your Approval
- Credit Memos Requiring Your Approval
- Corporate Cards Requiring Your Approval
- Expense Reports Requiring Your Approval

Selecting an item opens the relevant module and displays the records requiring action.

Payment Actions Required Today

The **Payment Actions Required Today** panel **highlights time-sensitive payment-related items** that require attention based on Company configuration and user role. This panel appears for Companies that have Invoice Automation or Payment Automation enabled.



Depending on configuration, the panel may include:

- Invoices to Process
- Payment Runs Requiring Your Approval
- Payment Runs Requiring Others’ Approval

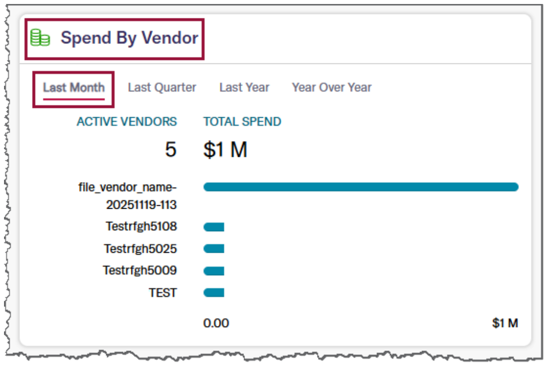
Selecting an item opens the relevant module and displays the records requiring immediate attention.

Spend by Vendor

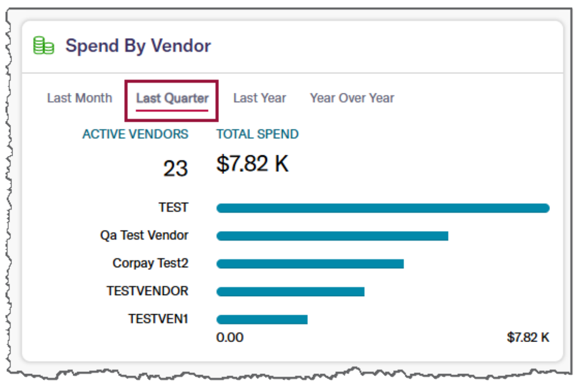
The **Spend by Vendor** panel provides a **summary view of Company spending across top Vendors**. This panel is intended to support high-level review and navigation rather than detailed transaction analysis.

Users can switch between the following views:

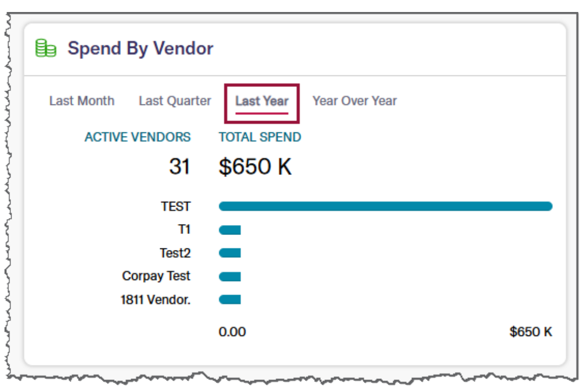
- Last Month



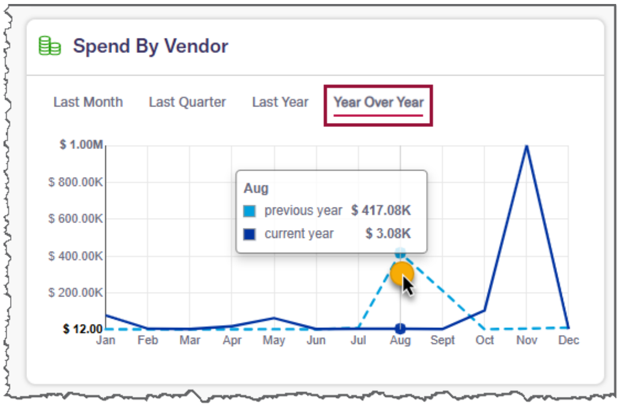
- Last Quarter



- Last Year



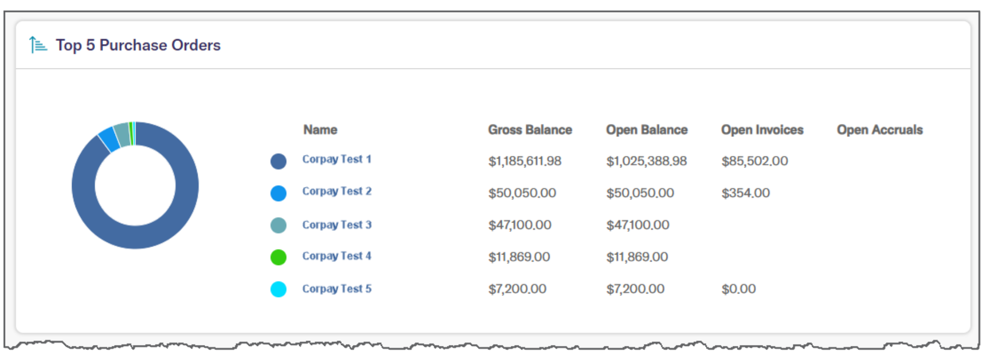
- Year Over Year



Selecting a Vendor or interacting with the chart navigates to the relevant module or Vendor details for further review.

Top 5 Purchase Orders

The **Top 5 Purchase Orders** panel highlights purchase orders with the highest balances for the Company.



For each Vendor shown, this panel includes:

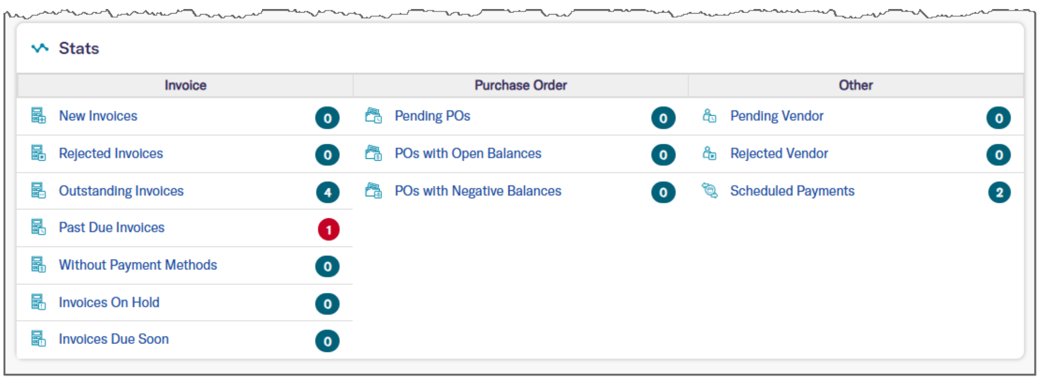
- Gross Balance
- Open Balance
- Open Invoices
- Open Accruals

Selecting a Vendor name opens the **Vendor Details** page, where users can review related purchase orders and activity.

Stats

The **Stats** panel provides a high-level summary of invoices, purchase orders, and other categories that may require attention.

Each row represents a category of records. Selecting a row navigates to the corresponding module and displays the relevant records.



Main Dashboard Usage

The Main Dashboard is intended to be **used as a starting point rather than a destination**. Users typically:

- review **Actionable Items** and **Payment Actions Required Today** to identify priorities,
- select panel links to **navigate directly to records that require attention**,
- return to the Main Dashboard periodically to **reassess activity across the platform**.

Because the Main Dashboard reflects real-time system data, it may be accessed multiple times throughout the day.

Approvals

The Approvals capability defines the **review processes required before financial activity can proceed**. Approval workflows determine which users must approve invoices, purchase orders, expenses, payments, card transactions, or other items. Although workflows are configured in the **Administration** module, approval actions can be performed directly from record detail pages. This consistent model supports segregation of duties, auditability, and compliance by ensuring that transactions follow the correct review paths before they are finalized.

For details on configuring approval workflows or completing approval actions within specific modules, refer to the **Approvals Module** section of the **Corpay Complete Knowledge Base**.

Vendors

The **Vendors** module allows users to **view and manage Vendor records** used across purchasing, invoicing, payments, and Card workflows. Users can review Vendor details, payment information, documentation status, and communication history within a centralized record. The module serves as a shared reference point for Vendor-related activity throughout Corpay Complete.

For guidance on managing Vendor records, contacts, documentation requirements, and profile maintenance, refer to the **Corpay Complete Vendors Module User Guide**.

Purchase Orders

The **Purchase Orders** module allows users to **create, review, and manage purchase orders throughout their lifecycle**. Users can associate purchase orders with Vendors, track open balances, and link purchase orders to related invoices or receiving activity.

More information about creating, issuing, and managing purchase orders can be found in the **Purchase Orders Module** section of the **Corpay Complete Knowledge Base**.

Accruals

The **Accruals** module allows users to **review and manage accrued expenses** that have **not yet been invoiced or paid**. Users can review accrual records, associate accruals with invoices when they are received, and monitor outstanding accrued amounts.

For additional details about accrual management and campaign setup, refer to the **Accruals Module** section of the **Corpay Complete Knowledge Base**.

Invoices

The **Invoices** module allows users to **create, review, and manage invoices throughout their lifecycle**. Users can capture invoices from multiple sources, review invoice details, and route invoices through approval workflows before payment.

For detailed instructions on invoice creation, matching, and reporting, refer to the **Corpay Complete Invoices Module User Guide**.

Credit Memos

The **Credit Memos** module supports the **creation, review, and application of Vendor credit memos to outstanding invoices**. Credit memos adjust balances, reduce payment amounts, or resolve overpayments. Users can locate credit memos from Vendor records or invoice details and apply them to specific invoices during payment preparation.

Users who would like additional guidance on creating, editing, or applying credit memos may refer to the **Credit Memos Module** section of the **Corpay Complete Knowledge Base**.

Expenses

The **Expenses** module allows users to **create, review, and submit employee expenses**, including Card and non-Card transactions, for approval. Users can manage expense items and reports, resolve policy exceptions, and track expense status within the platform. The module serves as the primary workspace for reviewing employee spend and ensuring expenses are properly documented before reimbursement or reconciliation.

For step-by-step instructions on submitting expenses, applying policies, resolving exceptions, and approving employee spend, refer to the **Corpay Complete Expenses Module User Guide**.

Payments

The **Payments** module allows users to **review, approve, and manage payments for invoices and reimbursements**. Users can monitor payment status, participate in approval workflows, and access remittance information within a consistent interface.

Detailed guidance on payment scheduling, settlement processes, approval workflows, and reconciliation is available in the **Corpay Complete Payments Module User Guide**.

Receiving

The **Receiving** module **captures goods-received activity and connects it to purchase orders for two- or three-way matching**. Users can record received quantities, link receipts to purchase order lines, and support matching workflows that verify ordered, received, and invoiced items. This module helps organizations maintain accurate inventory or service verification records before invoices are processed and paid.

Cards

The **Cards** module supports the **management of Cards**, enabling organizations to issue Cards, enforce controls, monitor spending, and review transaction activity. Users can view Card lists, adjust limits, apply temporary blocks, and analyze spending patterns by Vendor, department, or category. Declined transactions, card balances, and active card programs can be monitored in real time. This module provides integrated oversight to ensure visibility and control over Card-based spend throughout the organization.

For further details on issuing Cards, adjusting limits, monitoring Card activity, and managing declines or blocks, refer to the **Corpay Complete Cards Module User Guide**, **Corpay Complete Virtual Card Program User Guide**, and **Corpay Complete Cards Module - Fleet Options User Guide**.

Budgets

The **Budgets** module provides **oversight for planned spending and integrates with purchasing and invoicing workflows**. Budgets help organizations monitor commitments and actuals against predefined limits, improving visibility into planned versus unplanned spend. While detailed configuration may vary by implementation, budgets typically operate alongside purchase orders, accruals, and invoices to support financial discipline.

Subsidiaries

Subsidiaries represent distinct organizational entities within Corpay Complete. Company-level configuration, roles, approvals, and reporting partitions often depend on subsidiary assignment. This module supports multi-entity organizations by enabling structure, governance, and visibility tailored to each subsidiary’s requirements.

Reports

The Reports module is a shared capability used across multiple areas of Corpay Complete to support data analysis and reporting. It provides **standard and customized reports for financial processes**, including payments, invoices, Vendors, expenses, and purchasing activity. Reports may be created on demand or scheduled for recurring delivery. Because reporting access is role-based, only authorized users can create or download reports. Reporting is available both within modules and from a centralized reporting area, supporting reconciliation, audit requirements, and strategic analysis.

For additional information about reports, refer to the **Reports Module** section of the **Corpay Complete Knowledge Base**. Guidance for running module-specific reports, such as invoice or payment reporting workflows, can be found in the individual user guides associated with those modules.

Documents

The Documents module provides a **centralized view of all documents uploaded to Corpay Complete**, regardless of where they originate. Documents may include invoices, receipts, card statements, rebate statements, contracts, and other supporting files.

While the Documents module allows users to **access all documents in one place**, individual documents are **also accessible within the relevant modules** and **record details pages**. This enables users to view and manage documents directly in the context of the associated record while maintaining a complete, centralized document listing.

Documents are linked to their related records and audit history to support traceability and compliance throughout the financial lifecycle. Users seeking workflow-specific instructions should refer to the individual module user guides, which describe how documents are used in context.

Users

The **Users** module allows administrators to **manage system access by creating, editing, disabling, or reactivating user accounts**. Administrators may assign roles, manage delegates, configure team structures, and review user details. The module also supports reporting on user activity, ensuring that access to sensitive financial features aligns with organizational policies and compliance requirements.

Guidance on user management, role assignment, profile settings, security, and delegation features is available in the **Corpay Complete User Profile and Users Module User Guide**.

Administration

The Administration module governs global Company configuration and platform behavior. It contains tools for managing approval workflows, roles and permissions, security settings, subsidiary configuration, and other controls that span multiple modules. Changes made in Administration can influence visibility, workflow behavior, and governance across the platform, making this module central to system oversight and configuration.

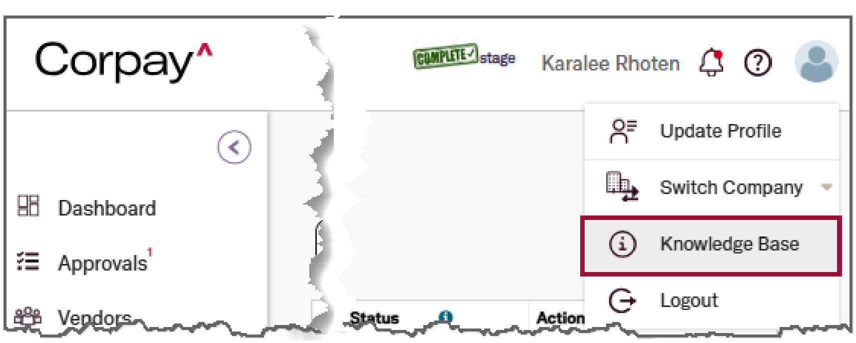
For configuration steps, workflow setup, permissions management, and other Company-level settings that apply to specific modules, users may consult the individual module user guides for detailed procedures. Broader information about administrative features and platform-wide configuration options is also available in module sections of the **Corpay Complete Knowledge Base**.

Additional Resources

Corpay Complete includes several resources that support users as they become more familiar with the platform. These resources provide access to reference materials, answers to common questions, and additional guidance that extends beyond the foundational concepts in this introduction.

Corpay Complete Knowledge Base

The **Corpay Complete Knowledge Base** contains articles, reference materials, and user documentation for many features across the platform. Users can access the **Knowledge Base** from within Corpay Complete by selecting **Knowledge Base** in the **Avatar** menu. This resource is the best place to locate current information about modules, workflows, configuration options, and updates. Because the Knowledge Base is regularly enhanced, users are encouraged to consult it for the most accurate and up-to-date guidance.



Module-Specific Guidance

The **Corpay Complete Introduction Guide** provides a high-level overview of the platform and its navigation features. For detailed procedures and workflow-specific instructions, users should refer to the documentation available in the **Corpay Complete Knowledge Base**.

In-Platform Help Features

Corpay Complete includes several in-platform tools designed to assist users while they work. These include tooltips, on-screen alerts, and contextual indicators that appear throughout the modules. Many grids and detail pages also contain quick-access controls that allow users to review documents, audit history, or recent activity without leaving the record. These features help users navigate and resolve questions.

When to Contact Support

If users encounter issues that cannot be resolved through the Knowledge Base or in-platform features, support requests should be directed based on the Customer's configuration. Customers using Payment Automation solutions should contact **Corpay Complete Technical Support** at **techsupport@corpay.com**. Customers using Cards-only or Expenses-only solutions should contact **Account Management** at **accountmanagement@corpay.com**.