



Corpay Complete Cards Module User Guide

Version 1.4

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Version	Date	Description of Changes
1.0	06/11/2025	Initial Release
1.1	09/30/2025	Updated to add new Corpay Complete functionalities and tasks
1.2	01/22/2026	Updated the Disputes section, added table.
1.3	3/27/2026	Updated to add POs Ordering Cards, Adding a Receipt, Associating a Card to a Purchase Oder, Transaction Types sections; updated the Disputes Section, Report Table, other changes made based on release updates.
1.4	4/10/2026	Updated the Card Management 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 and seamless integrations with Enterprise Resource Planning (ERP) systems.

The **Corpay Complete Cards Module User Guide** serves as a comprehensive user guide for navigating and using the **Cards module** within the Corpay Complete platform. The user guide explains how to manage Physical and Ghost Cards, view and track transactions, and maintain Card profiles. The guide covers tasks such as ordering a Card, blocking a Card, enabling a temporary spending limit, and reviewing Card activity.

Configuration and Roles Overview

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

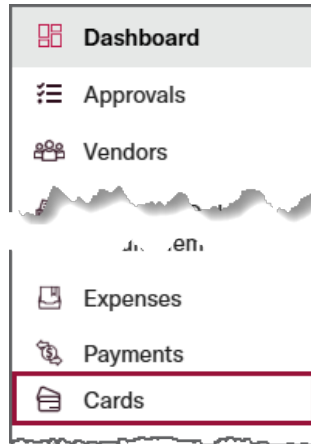
Company configuration may vary depending on how payment responsibilities are managed. As a result, certain pages, information, and features may not be accessible, or the information may be available in a view-only format. These permissions, access levels, and configuration settings should be considered when reviewing this user guide.

Admin Contact for Account Management

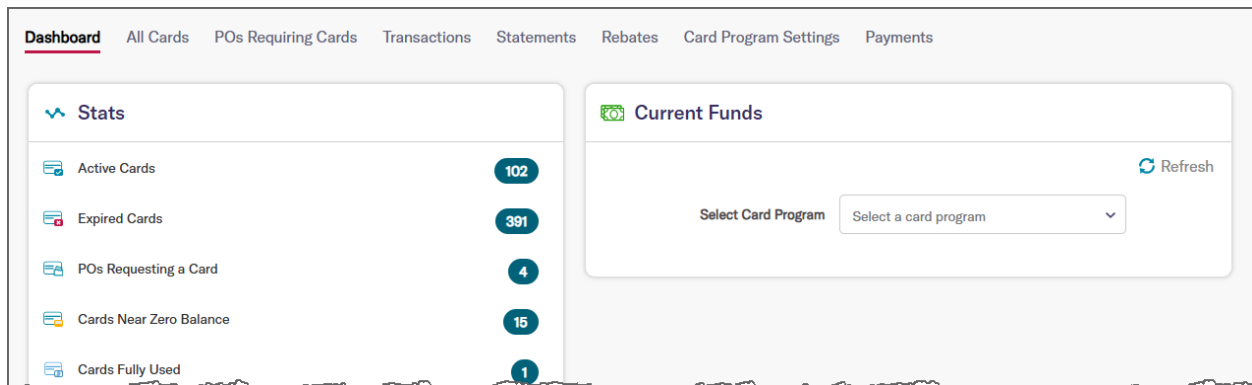
If any task outlined in this user guide requires an Admin to contact our Account Management team, please send an email to accountmanagement@corpay.com.

Access the Cards Module

1. Log in to [Corpay Complete](#).
2. Click the **Cards** module from the left-side navigation pane.



3. The **Cards** module will display.



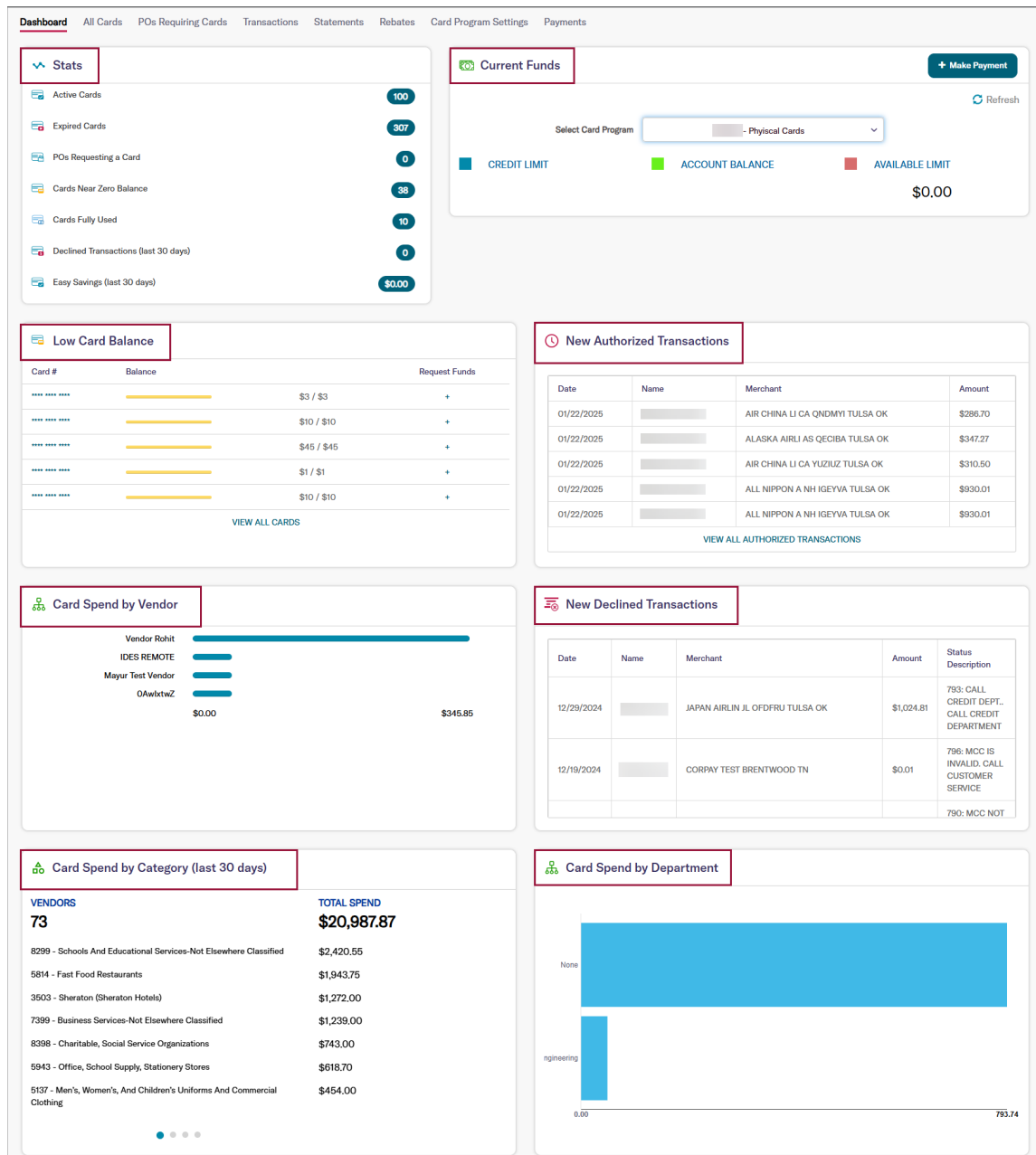
Cards Module Dashboard

The **Dashboard** of the **Cards module** offers a comprehensive overview of various details pertaining to the account currently in view.

There are several sections that appear on the Cards dashboard. It is important to note that the **modules on the dashboard will differ depending on Company customization.**

The image below is an example of a **typical Cards dashboard** for a customer with **both Ghost Cards and Physical Cards.**

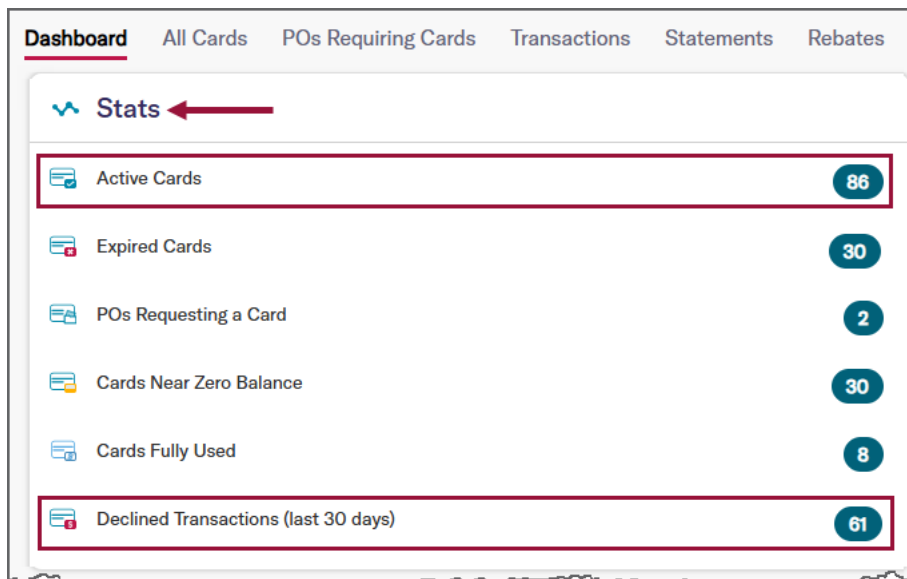
Continue to the next page to **learn about each section of the Cards Module Dashboard.**



Stats

The **Stats** section shows a high-level overview of the **Card Statistics** and **Card Activity** on the account.

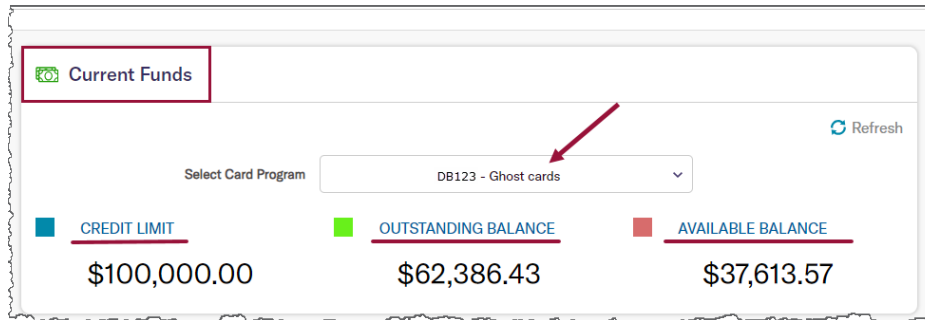
- The **Stats** section shows links for: Active Cards, Expired Cards, POs (Purchase Orders), Requesting a Card, Cards Near Zero Balance, Cards Fully Used, and Declined Transactions (last 30 days).
- Users may select **any link** within the **Stats** section to navigate directly to the relevant page for detailed information regarding their selection.
 - **For example:**
 - Clicking **Active Cards** will navigate the user to the **All Cards** tab with the **grid filtered to only show Active Cards**.
 - Clicking **Declined Transactions (last 30 days)** will navigate the user to the **Transactions tab**, with the **grid filtered to show Declines**.



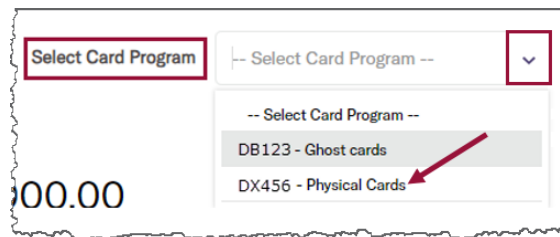
Current Funds

The **Current Funds** section shows the **available Card Programs** in a drop-down menu as well as the Credit Limit, Outstanding Balance, and Available Balance for the selected Card Program.

- The below image shows the credit limit and balances for the **Ghost Cards**.



- To change the Card Program, click the **drop-down arrow** to the right of the **Select Card Program** field. Then, select the **Card Program** you wish to view.



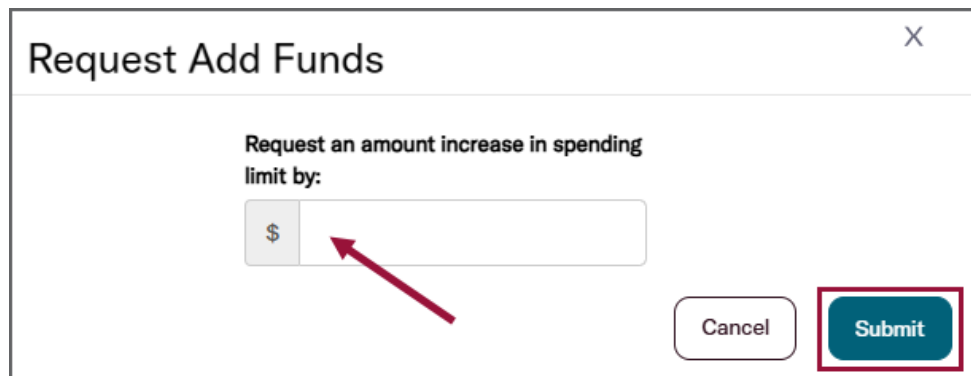
Low Card Balance

The **Low Card Balance** section displays a selection of Cards that have low available balances. **Note that this section does not include all Cards.** To view all Cards, click the **View All Cards** link. (Column Descriptions are provided on the next page).

The screenshot shows the 'Low Card Balance' section. It features a table with columns for Card #, Balance, and Request Funds. A 'VIEW ALL CARDS' link is located at the bottom of the table.

Card #	Balance	Request Funds
**** * 7538	\$0 / \$4675	+
**** * 9297	\$341 / \$600	+
**** * 5024	\$1765 / \$2000	+
**** * 0538	\$5.59 / \$2000	+
**** * 6469	\$0 / \$135	+

- A. **Card #** – This field displays the **last four digits** of the Card. Click the blue Card link to be directed to the [Card Details](#) page.
- B. **Balance** – This field displays a visual of the **funds used** (in yellow), and **funds available** (in blue). To the right of the visual is the specific amount of funds used / funds available.
- C. **Request Funds** – This field gives the **option for a user** to click the **+ icon** to request additional funds be added to the Card number listed in the **Card #** field.



Request Add Funds

Request an amount increase in spending limit by:

\$


Cancel Submit

- For more information on **adding funds**:
 - Click [here](#) to perform a **one-time purchase**.
 - Click [here](#) to enable a **temporary spending limit**.
 - Click [here](#) to **reset a Card limit**.

New Authorized Transactions

The **New Authorized Transactions** section shows the **most recent Card transactions**, for Ghost and Physical Cards, on the Account. This section displays the **transaction date**, **cardholder name**, **merchant** where the Card was used, and the **amount** of the transaction.

To view more information about the transactions, click **View All Authorized Transactions**. This will take you to the [Transactions tab](#) with the filter set to show all transactions that are in **Authorized** status.

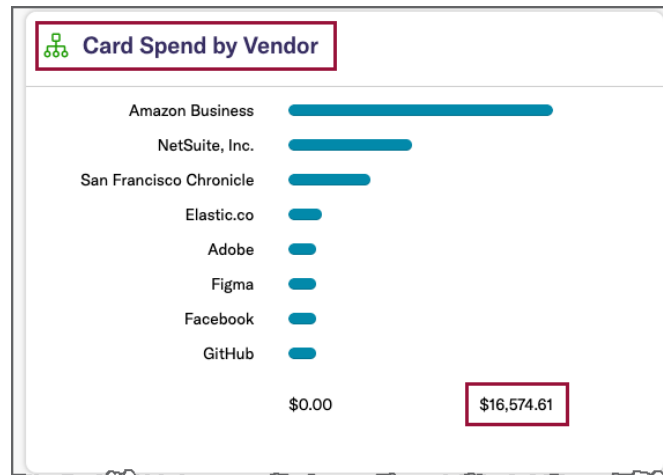
 **New Authorized Transactions**

Date	Name	Merchant	Amount
04/15/2025	Jacob [REDACTED]	EXXON M-MART [REDACTED]	\$38.00
04/15/2025	Robert [REDACTED]	HANDY MART [REDACTED]	\$16.00
04/15/2025	George [REDACTED]	CREWS ENVIRONMENTAL [REDACTED]	\$92.70
04/15/2025	Shawn [REDACTED]	QT [REDACTED]	\$37.92

[VIEW ALL AUTHORIZED TRANSACTIONS](#)

Card Spend by Vendor

The **Card Spend by Vendor** section shows any Vendors that are set-up on Card. The visual shows top Card spend by Vendor.



New Declined Transactions

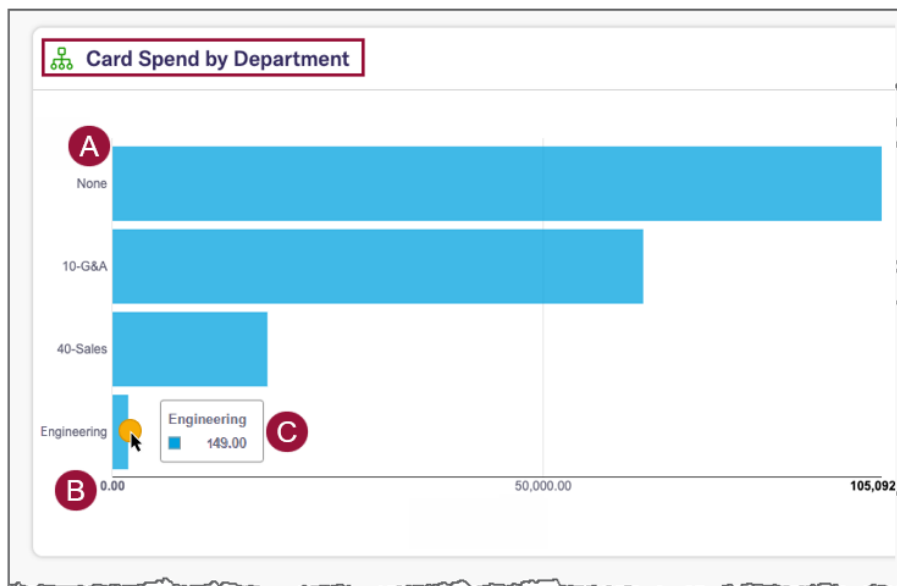
The **New Declined Transactions** section shows the most recent **declined transactions**. This section shows the **date** of the decline, **name** of the cardholder, **Merchant** where the Card was used, and the attempted **amount** of the transaction.

- A. **Vendors** – This number shows the total number of Vendors where the Cards have been used.
- B. **Total Spend** – This number shows the total amount of spend across all Cards.
- C. **Vendor Paid listed by MCC** – This line shows the MCC code for the Vendor where the Cards were swiped.
- D. **Amount Spent by MCC** – This line shows the total amount spent for that particular MCC.

Card Spend by Department

The **Card Spend by Department** section shows the **breakdown of Card spend by Departments**. This section will **vary by Company setup**.

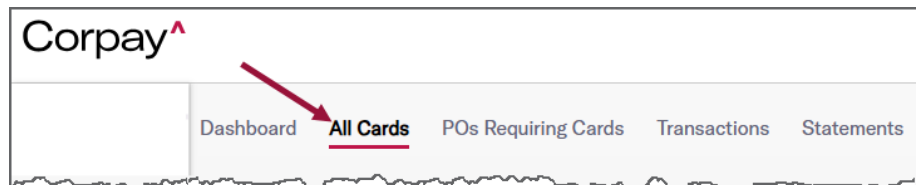
- A. **Department names** are along the left on the Y axis of this graph.
- B. **Amounts** are across the bottom on the X axis of the graph.
- C. Users can hover their mouse over each blue section **to reveal a pop-up window** and see **how much has been spent** by each department.



All Cards Tab

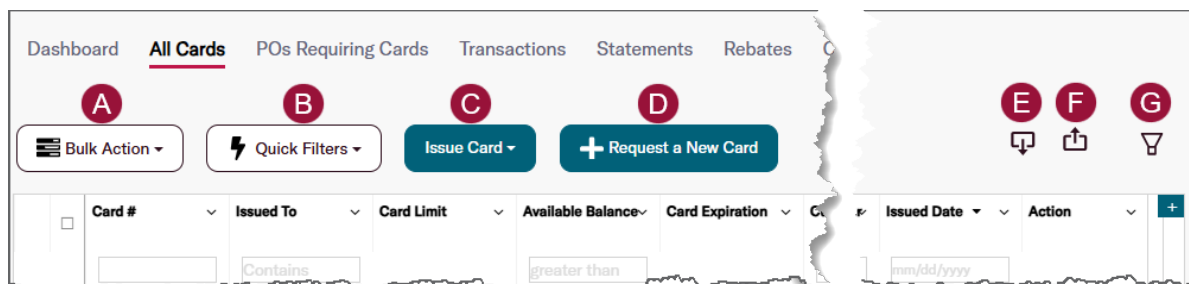
The **All Cards** tab shows detailed information for all Cards such as Card number, status, available balance, and Card program type. Depending on their role permissions, Admins or cardholders may also be able to perform activities such as requesting or issuing a Card.

From the **Cards Module Dashboard**, click the **All Cards** tab.



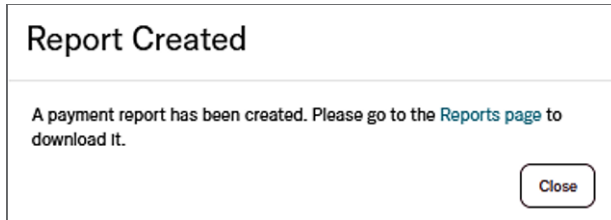
Header

Refer to this section for how to **read and navigate** the **Header** of the **All Cards** tab.

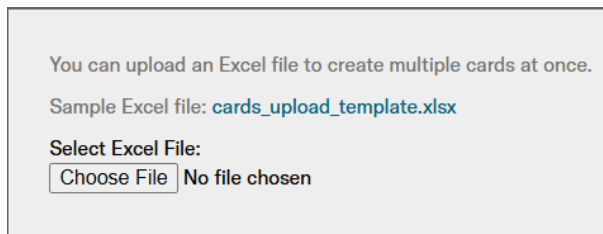


- A. **Bulk Action** – Use this drop-down to **deactivate, block, or unblock Cards**. Click [here](#) for more information on blocked or inactive Cards.
- B. **Quick Filters** – Use this drop-down to select from a list of default filters.
- C. **Issue Card** – Users with the proper Admin credentials can use this button to issue a new Card. Click [here](#) to navigate to the **Order a New Card** section of this guide for further instructions.
- D. **Request a New Card** – Cardholders can use this button to request that an Admin order a new Card. Click [here](#) to navigate to the **Request a New Card** section of this guide for further instructions.

- E. **Export Payments** – Click this icon to generate a downloadable Excel **Card Listing** report.
- The usability of this function is **based on the user’s permissions or role**.
 - Open the [Reports Module](#) to access and view the report or open it from the user’s **Downloads** folder.



- F. **Import Payments** – Click this icon to create multiple Cards at once using the **Cards Upload Template** Excel file.



- G. **Toggle Filter** – Click the **Toggle Filter**  icon to turn the **grid filters on or off**. Users can rearrange, add, or delete columns based on business need.

IMPORTANT

Columns on the Cards Module Grid are customizable.

Click the **Column Editor** icon on the far right of the grid to add and delete columns.




Card Program	Employee Number	Issued Date	Action	
Name		mm/dd/yyyy		+
Physical Cards		03/07/2025	👁️ ✉️ ✎️	
Physical Cards		03/07/2025	👁️ ✉️ ✎️	
Ghost Cards		03/07/2025	👁️ ✉️ ✎️	

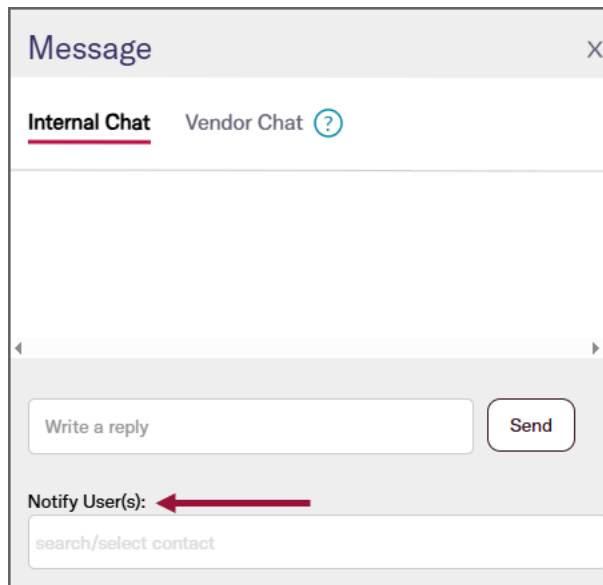
Cards Module > All Cards Grid

Refer to this section for how to **read and navigate** the **All Cards Grid**

	A	B	C	D	E	F	G	H	I	J	K	L
	Card #	Issued To	Card Limit	Available Balance	Customer Id	Account Code	Status	Card Program Type	Card Program Name	Employee Number	Issued Date	Action
<input type="checkbox"/>	<input type="text"/>	<input type="text" value="Contains"/> <input type="text"/>	<input type="text"/>	<input type="text" value="greater than"/> <input type="text" value="less than"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="ALL"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="mm/dd/yyyy"/> <input type="text" value="mm/dd/yyyy"/>	<input type="text"/>
<input type="checkbox"/>	**** *1234	Dinesh ...	\$5,000.00	\$5,000.00			ACTIVE	PHYSICAL	Physical Cards		03/07/2025	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	**** *4567	Pratiksha ...	\$1.00	\$1.00			INACTIVE	PHYSICAL	Physical Cards		03/07/2025	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	**** *8912	Pratiksha ...	\$5,000.00	\$5,000.00			ACTIVE	GHOST	Ghost Cards		03/07/2025	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

- A. **Card Number** – The last four digits of the Card number. Click the **Card number link** to view the Card Details screen. Click [here](#) to navigate to the **Card Details** section of this guide.
- B. **Issued To** – The name of the person the Card is assigned to.
- Clicking on the **blue name hyperlink** will navigate the user to the **Users Module > User Details** page. For more information on the Users Module, click [here](#).
- C. **Card Limit** – The overall limit on the Card.
- D. **Available Balance** – The amount of money currently available on the Card for use. (This field is not the Card's overall limit).
- E. **Customer Id** – The Cust ID that the Card is assigned to.
- F. **Account Code** – The Account Code the Cust ID is assigned to.
- G. **Status** – The status of the Card.
- **Pending** – The Card has been requested but is awaiting approval as part of an approval workflow.
 - **Active** – The Card is active and ready to use.
 - **Inactive** – The Card is inactive and cannot be used. **Admins cannot change the status of an inactive Card**; a new Card must be ordered. Click [here](#) to order a new Card.
 - **Approved** – The Card has been approved to activate.
 - **Rejected** – The Card was requested but not approved.
 - **Blocked** – The Card has been blocked from usage. **Admins can change the status of a Card from blocked to active**. Click [here](#) to view those instructions.
 - **TMP Blocked** – The Card is on a temporary block.

- H. **Card Program Type** – The type of Card: Virtual, Ghost, or Physical.
- I. **Card Program Name** – The name of the Card program the Card is attached to.
- J. **Employee Number** – The cardholder’s employee number.
- K. **Issued Date** – The date the Card was issued.
- L. **Action** – This column contains the following action icons. The availability of icons depends on the payment’s status.
 - **View** – Click the **View**  icon to open the [Card Details](#) page.
 - **Edit** – Click the **Edit**  icon to open the **Manage Card** dialog.
 - **Message** – Click the **Message**  icon to open the **Message dialog** where the following options are available.
 - **Internal Chat** – Use this tab to send an internal message to a user who has submitted a Card request or approver(s).
 - **Vendor Chat** – Use this tab to send a message to a Vendor or respond to a message.
 - To inform users about the internal or Vendor-facing message, **key in their names** in the **Notify User(s)** field. If no user is added to the **Notify User(s)** field, only users with Admin roles will receive a notification of a new message.



POs Requiring Cards Tab

The **POs Requiring Cards** tab shows detailed information for Purchase Orders that require a Card for payment, such as PO number, requestor, requested amount, subsidiary, status, and vendor. Depending on their role permissions, Admins may also be able to perform activities such as managing or exporting POs that require Cards.

From the **Cards Module Dashboard**, click the **POs Requiring Cards** tab.

POs Requiring Cards Grid

Refer to this section for how to read and navigate the **POs Requiring Cards** grid.

PO #	Requestor	Date	Requested Amount	Subsidiary	Status	Vendor	Vendor Status	ID	Actions
PO-104018	0405 TEST USER3	02/09/2026	\$200.00	Corpay Complete	OPEN	ACADEMIC COMMUNICATI	ACTIVE	61102	...
PO-103354	Pratikha Test user	01/08/2026	\$1,000.00	Test Country 1	OPEN	AJPH SUBSCRIPTIONS 395	ACTIVE	58869	...

- A. **PO #** – The Purchase Order number created and assigned by Corpay Complete.
- B. **Requestor** – The name of the user who submitted the Purchase Order.
- C. **Date** – The date the Purchase Order was created.
- D. **Requested Amount** – The total dollar amount requested on the Purchase Order.
- E. **Subsidiary** – The subsidiary associated with the Purchase Order.
- F. **Status** – The current status of the Purchase Order.
- G. **Vendor** – The name of the Vendor associated with the Purchase Order.
- H. **Vendor Status** – The current status of the Vendor.
- I. **ID** – The system-generated internal identifier for the Purchase Order.
- J. **Actions** – Click the ellipsis icon to perform available actions for the selected Purchase Order.
 - View – Use this option to view details of the selected Purchase Order.

- Delete – Use this option to delete the selected Purchase Order.
- Issue Card – Use this option to issue a card requested through the selected Purchase Order.

Card Details

This section explains how to **read and navigate the Card Details** screen, including its various fields, sections, and tabs. It provides an overview of each area within the screen and guides you through its features and functions.

From the **Cards Module > All Cards** tab, click the **blue Card number hyperlink** of the Card to be viewed. This will open the **Card Details** page.

- The **Card Details** page can be accessed from various places within Corpay Complete. Any time a Card number is listed, the number is a **hyperlink to the Card Details** page.

Card #	Issued To	Card Limit	Available Balance	Card Expiration	Customer Id	Account Code	Status
**** * 1234	Dinesh	\$5,000.00	\$5,000.00				ACTIVE
**** * 4567	Pratiksha	\$1.00	\$1.00				INACTIVE
**** * 8912	Pratiksha	\$5,000.00	\$5,000.00				ACTIVE

All Cards / Card Details ←

**** * 1234 ✓ ACTIVE

Card Info Accounts

Issued Date 12/12/2024

Expiry Date 2026-11

Card Creation Date 12/12/2024

End Date ? 12/12/2025

Request Number C-104470

CVC ***

Issued To [REDACTED]


Cardholder Email [REDACTED]


Employee Number

Requestor

Card Info Tab

Column 1

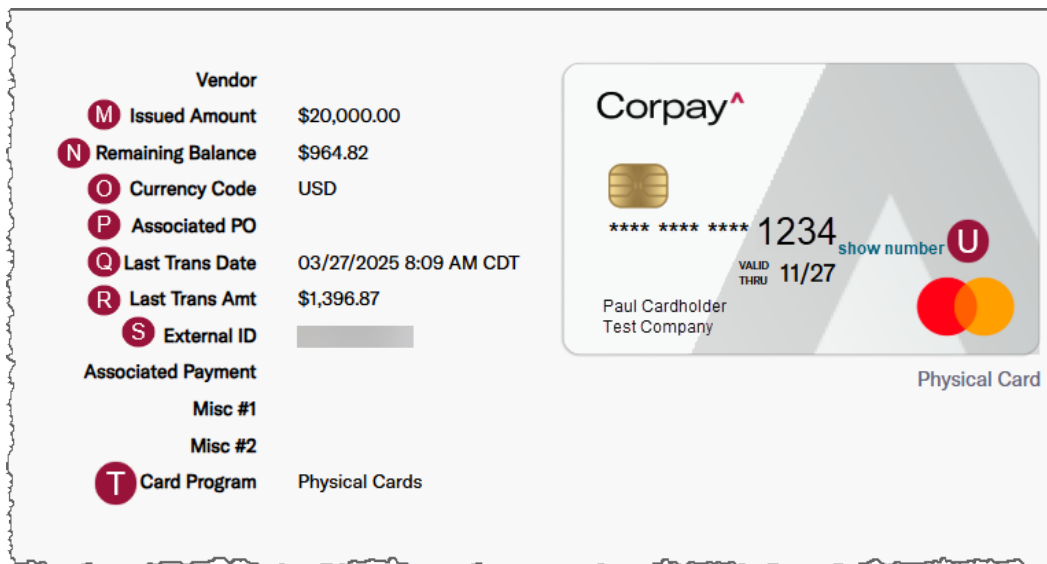
<u>Card Info</u>	Accounts
A Issued Date	09/03/2024
B Expiry Date	2027-11
C Card Creation Date	09/03/2024
D End Date 	11/30/2027
Request Number	C-10562
E CVC	***
F Issued To	Paul Cardholder
G Cardholder Email	pcardholder@testcompany.com
H Employee Number	12345678
Requestor	
Department	
PO Departments	
I Subsidiary	Test Company
J Billing Address	5301 Maryland Way, Brentwood, TN 37027
K Description	

<u>Card Info</u>	Accounts
Issued Date	03/27/2024
Expiry Date	2027-11
Card Creation Date	03/27/2024
End Date 	11/30/2027
L Deactivation Date	01/22/2025
Request Number	C-10562

- A. **Issued Date** – The date the Card was ordered.
- B. **Expiry Date** – The Card's expiration date.
- C. **Card Creation Date** – The date the Card was created.
- D. **End Date** – This field will be populated for Cards attached to a purchase order.
 - Customers can set this date when issuing a PO.
 - The Card will be automatically blocked once the end date has passed.
- E. **CVC** – (Card Verification Code) The security code used to verify the Card's legitimacy during a transaction. For Physical Cards, this number is found on the back of the Card.
- F. **Issued To** – The name of the person the Card is assigned to.
- G. **Cardholder Email** – The cardholder's email address.
- H. **Employee Number** – The cardholder's employee number.

- I. **Subsidiary** – The name of the subsidiary, if applicable.
- J. **Billing Address** – The address the Card was sent to.
- K. **Description** – Any relevant clarifications attached to the Card, if needed.
- L. **Deactivation Date** – Certain views/permissions may display this field.
 - o The date in this field will **initially match the expiration date**.
 - o Once the Card is **deactivated in Corpay Complete**, this field will show the Corpay Complete **deactivation date**.

Columns 2 and 3



- M. **Issued Amount** – The overall limit on the Card.
- N. **Remaining Balance** – The amount of money available on the Card for use.
- O. **Currency Code** – The three-letter code that represents the Card’s currency.
- P. **Associated PO** – The PO number, if one is attached to the Card.
- Q. **Last Trans Date** – The date the Card was last used.
- R. **Last Trans Amt** – The amount of the last successful transaction.

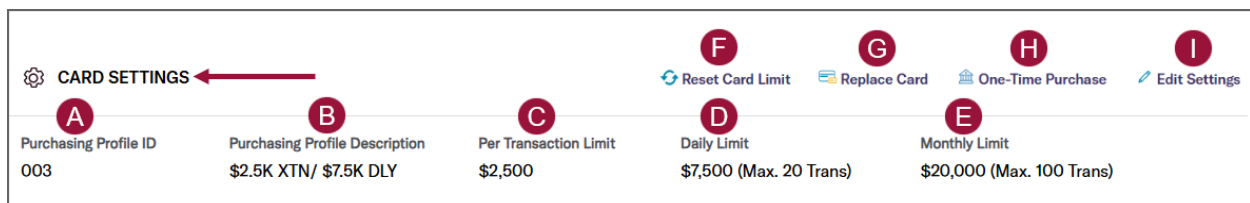
- S. **External ID** – The alphanumeric code assigned to the Card which allows internal users to look up the Card without giving the full Card number.
- T. **Card Program** – The type of Card: Virtual, Ghost, or Physical.
- U. **Show Number** – With proper role and approvals, Admins can click **Show Number** on the Card image and will be able to see the **full Card number**, for both Ghost and Physical Cards.



Card Settings

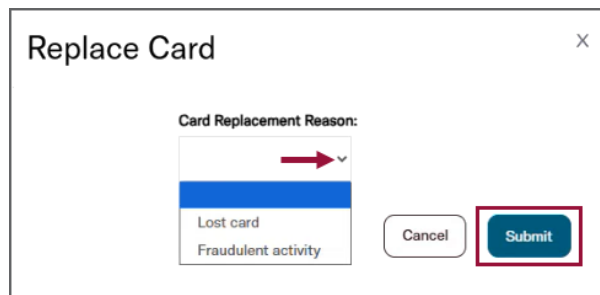
The **Card Settings** section shows **Card Profiles**, **Profile Descriptions**, and **Card Limits**. This section also has the options to Replace Card, perform a One-Time-Purchase or “off-profile” override, and edit settings. **Viewable fields depend on user and Admin permissions.**

To navigate to the **Card Settings**, stay on the **Card Details** screen and scroll down.

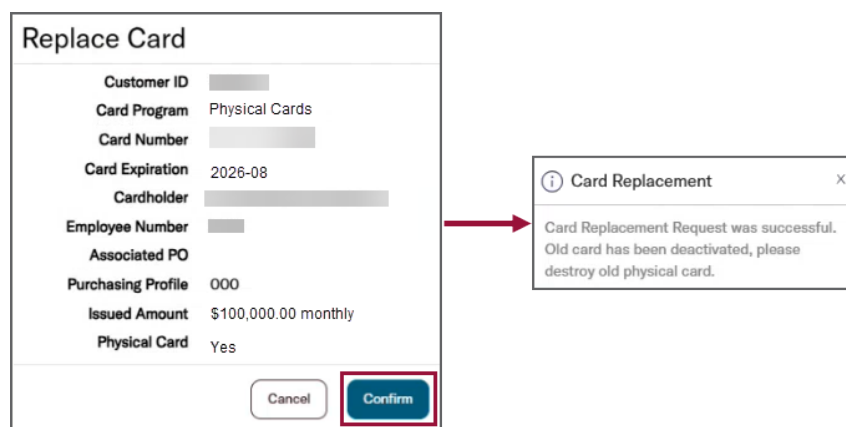


- A. **Purchasing Profile ID** – The Company-established profile number that the Card is adhering to.
 - Profile numbers are three digits. There is an option for multiple-Company profile numbers on Mastercards.
- B. **Purchasing Profile Description** – The Company-established description of the profile number.

- C. **Per Transaction Limit** – The total amount available per transaction.
- D. **Daily Limit** – The total amount available per day; reset at midnight, central.
- E. **Monthly Limit** – The total amount available each month and the maximum number of transactions allowed each month.
- F. **Reset Card Limit** – Click this button to reset all applicable transaction and spending limits for the Card.
 - o Click [here](#) to navigate to the **Reset a Card Limit** section of this guide.
- G. **Replace Card** – Cardholders can use this button to **request a replacement Card** if the current one is lost or has fraudulent activity.
 - o After clicking the **Replace Card** button, users will be shown the below window. Choose the reason why a new Card is needed and click **Submit**.



- o Review the Card details, then click **Confirm**. The Card will now show as **Inactive** in Corpay Complete.




- o Click [here](#) to access an alternative way to **request a Card** in Corpay Complete.

- H. **One-Time Purchase** – Click this button to perform a one-time override purchase in which the Card’s limits are overwritten for a single transaction.
 - Click [here](#) to navigate to the **One-time Purchase** section of this guide.




- I. **Edit Settings** – This button opens the **Manage Card** window, in which updates can be made to the Card.
 - **Several Card updates are performed on the Manage Card window.** Those tasks are explained within the [Card Management](#) section of this guide.

Transactions Section

Under the Card Settings, you will find the Transaction Section. This **section** shows all the transactions for the Card, with pertinent information such as **Date**, **Merchant**, **Status**, and **Amount**.

Users can click the link in the **Purchase #** column or the **View**  icon in the **Actions** column to see more information about the transaction.

Note: This section functions the same way as the features in the **Transactions tab**. Click [here](#) to navigate to the **Transactions tab** section of this guide.

TRANSACTIONS							Filter by
Purchase #	Trans Type	Date	Merchant	Category	Status	Amount	Actions
PUR-503945	DEBIT	02/20/2025	CHICK-FIL-A #04211	5814	CLEARED	\$8.11	
PUR-331059	DEBIT	12/18/2024	TARGET.COM	5310	CLEARED	\$10.00	
PUR-304706	DEBIT	12/06/2024	AMAZON.COM*ZR4Z22B22	5942	CLEARED	\$13.93	

Shipping Details

To navigate to the **Shipping Details**, stay on the **Card Details** screen and scroll down.

The **Shipping Details** section of the **Card Details** shows the address where the Card was shipped or will be shipped, and the carrier used to deliver the Card.

SHIPPING DETAILS	
Shipping Address	Carrier
1234 CARDHOLDER DRIVE ABC CITY, TN 12345	USPS

Approval Workflow

To navigate to the **Approval Workflow**, stay on the **Card Details** screen and scroll down.

If an **Approval Workflow** is set up for ordering a Card, it will show in this section.

- For more information on ordering a Card and the approval workflow, click [here](#) to navigate to the **Order a New Card** section of this guide.
- For more information on the buttons in this section, Start Approval, Request Approval, and Preview Workflow, click [here](#) to navigate to the **Corpay Complete Payments Module User Guide**.

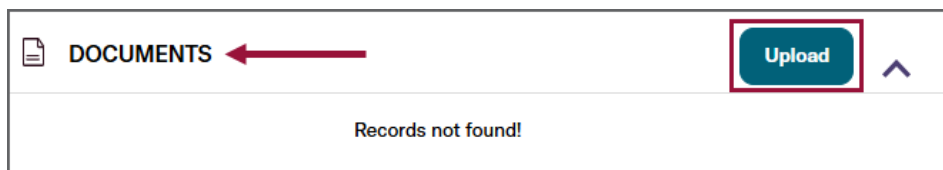
APPROVAL WORKFLOW						▶ Start Approval	+ Request Approval	🔍 Preview Workflow
Approval Steps	Last Updated Date	Approved Date	Rejected Date	Approvers	Status	There are no approvers		
There are no approvers								

Documents

To navigate to the **Documents** section, stay on the **Card Details** screen and scroll down.

Cardholders can click the **Upload** button and upload any **documentation that is relevant to the Card**.

This section is available for use based on internal Company policy requirements.



Data Audit Log

To navigate to the **Data Audit Log**, stay on the **Card Details** screen and scroll down.

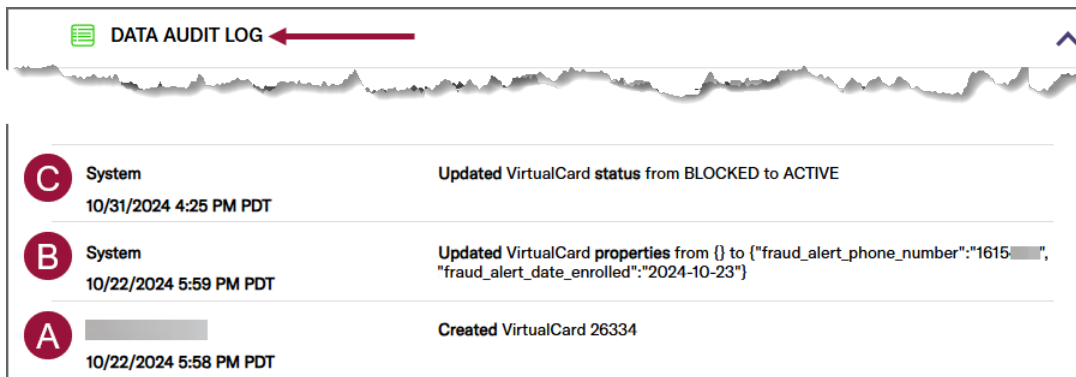
The **Data Audit Log** tracks every step a Card takes, beginning with creation. You can use the Data Audit Log to view changes that were made to the Card.

While each Card may follow a unique path, this section highlights some of the **most common system updates** throughout the process. The examples on the subsequent pages will follow a Card from creation.

The **most recent Card updates** appear at the **top of the log**, while the Card creation messages are located at the bottom, as it marks the first step in the process.

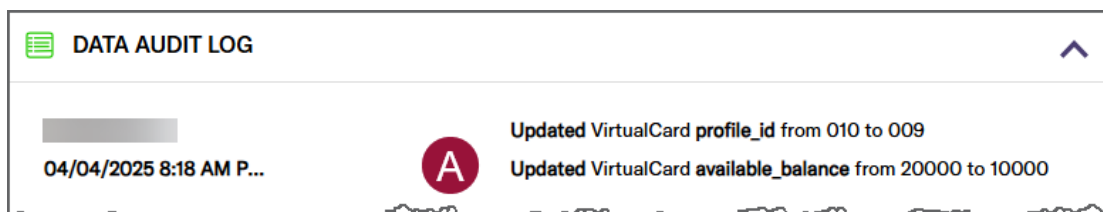
Card Creation

Please note that Physical Cards are listed as “Virtual Cards” on the Data Audit Log.



- A. In this example, the Card was created on 10/22/24 at 5:58pm pacific.
- B. At the time of creation, the cardholder's phone number was added to the Card because it was already on their user profile.
- C. The Card was activated on 10/31/24 at 4:25pm pacific.

Card Maintenance



- A. In this example, the Card's profile was changed from 010 to profile 009. As part of that profile change, the available balance on the Card changed from \$20,000 to \$10,000.

Activities

To navigate to the **Activities** section, stay on the **Card Details** screen and scroll down.

The **Activities** section is like the Data Audit Log; it records any activity that is done on the Card. The **most recent** updates appear at the top of the **Activities**.

While each Card may follow a unique path, this section provides examples of some of the **most common system updates**.

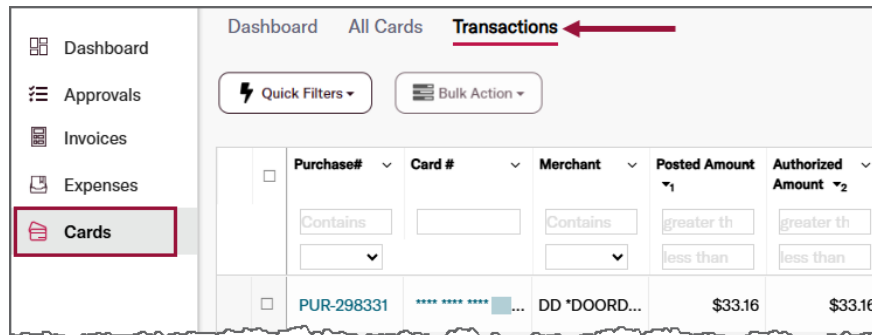
C	Name Comdata Status Webhook Date 10/22/2024 5:59 PM PDT Status COMPLETED	Summary {"token"=>"399T64V6R4", "cardLastFour"=>"1234", "status"=>"ACTIVE", "cardBlockReasonCode"=>"0", "employeeId"=>"3109628", "cardHolderFirstName"=>"PAUL", "cardHolderLastName"=>"CARDHOLDER", "creationDate"=>"2024-10-22", "userDefine"=>{}, "cardLimits"=>{"dailyAmountLimit"=>1000.0, "dailyAmountLimitUsed"=>0.0, "dailyAmountLimitHold"=>0.0, "dailyAmountLimitAvailable"=>1000.0, "dailyTransactionLimit"=>10, "dailyTransactionLimitUsed"=>0, "dailyTransactionLimitHold"=>0, "dailyTransactionLimitAvailable"=>10, "cycleAmountLimit"=>5000.0, "cycleAmountLimitUsed"=>0.0, "cycleAmountLimitHold"=>0.0, "cycleAmountLimitAvailable"=>5000.0, "cycleTransactionLimit"=>100, "cycleTransactionLimitUsed"=>0, "cycleTransactionLimitHold"=>0, "cycleTransactionLimitAvailable"=>100}, "cardContact"=>{"addressLine1"=>"5301 MARYLAND WAY", "addressLine2"=>"", "city"=>"BRENTWOOD", "state"=>"TN", "zip"=>"37179", "company"=>"CORPAY CHAMPAGNE", "attention"=>"PAUL CARDHOLDER"}, "cardProfile"=>{"companyStandardId"=>"001", "modificationTime"=>"2024-10-22 19:59:10.595066", "bin"=>"531561"}	Card activation and assignment Card limits set Shipping address established
B	Name VirtualCard-integration_create_event Date 10/22/2024 5:59 PM PDT Status SUBMITTED	Summary Integration Service: Job#8696523 for VirtualCard: #**** * 1234 has been submitted to sync (UPDATE) with a system external_id=399T64V6R4.	Last 4 digits of card # Card Token #
A	Name VirtualCard-integration_create_event Date 10/22/2024 5:58 PM PDT Status SUBMITTED	Summary Integration Service: Job#8696348 for VirtualCard: #- has been submitted to sync (CREATE) with a system external_id=.	

- Corpay Complete sent the Card data to Corpay's integration service to create the Card.
- Corpay Complete received the token number from the integration service, meaning the Card, and Card number, were created.
- The Card was activated, assigned, limits set, and shipping address assigned. See the screen shot above for specific line readings.

Transactions Tab

The **Transactions** tab shows **all the transactions** for the **Card** with pertinent information such as **Date**, **Merchant**, **Status**, and **Amount**.

From the **Cards Module Dashboard**, click the **Transactions** tab.



Transactions Grid

Part 1:

	A	B	C	D	E	F	G	H
	Purchase#	Card #	Merchant	Posted Amount	Authorized Amount	Posted Date	Authorized Date	Status
<input type="checkbox"/>	PUR-298331	**** *...*	DD *DOORD...	\$33.16	\$33.16	12/05/2024 ...	12/04/2024 ...	CLEARED
<input type="checkbox"/>	PUR-30470...	**** *...*	AMAZON.C...	\$13.93	\$13.93	12/07/2024 ...	12/06/2024 ...	CLEARED

Please note that **all columns** in this section are **customizable** by clicking the **Toggle Filter** icon. For more information on Filters, click [here](#) to navigate to the **All Cards Tab > Header** section of this guide.





- A. **Purchase #** – The number created and assigned by Corpay Complete to the purchase. Click the purchase number to navigate to the [Purchase Details](#) section of this guide.

- B. **Card #** – Click the Card number hyperlink to view the Card Details. Click [here](#) to navigate to the **Card Details** section of this guide.
- C. **Merchant** – The name of the Vendor receiving payment.
- D. **Posted Amount** – The amount that was settled (The exact amount of funds that were transferred from the cardholder’s Card balance to the merchant’s account).
- E. **Authorized Amount** – The amount the merchant requested be removed from the cardholder’s balance, effectively reserving that amount until the transaction settles.
- F. **Posted Date** – The date the transaction settled.
- G. **Authorized Date** – The date the transaction was run.
- H. **Status** – The status of the transaction.
 - **Authorized** – The transaction has been approved but not settled.
 - **Declined** – The transaction was declined. Click [here](#) to view more information on **Reasons for Decline**.
 - **Cleared** – The transaction was approved and settled by the merchant.
 - **Expired** – The transaction was not settled by the merchant within 30 days.
 - The pre-auth amount holds the determined amount of funds until the authorization expires; any pre-auth amount goes back to the Card.
 - The Card is not “charged” for the transaction until the transaction settles; therefore, the full amount of the transaction never left the Card.

Part 2:

Issued To	Category	Expense Item	Expense Report	Employee Number	Action
		Contains	Contains		
CHRISTINA ...	5812 - Eatin...	18878040	ER-13264	31	
CHRISTINA ...	5942 - Book...	18885256	ER-13264	31	
CHRISTINA ...	5310 - Disc...	18925368	ER-13264	31	

Field descriptions continue on the next page.

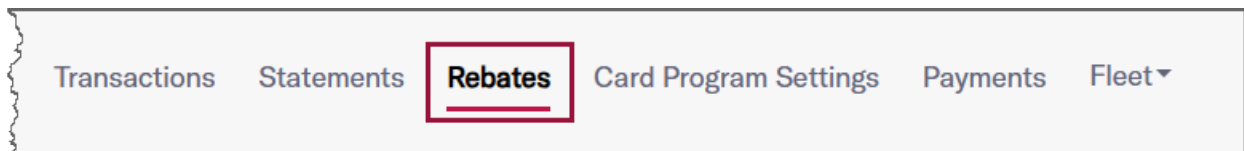
- I. **Issued To** – The name of the person the Card is assigned to.
- J. **Category** – The four-digit code assigned by Mastercard, along with a description of the MCC code under which the transaction was processed.
- K. **Expense Item** – The number assigned in Corpay Complete to the expense/transaction. This number is a hyperlink to **Expense Item Details** screen. For more information on the **Expense Module**, click [here](#) .
- L. **Expense Report** – If the transaction is associated with an expense report, the expense report number will display in this field. This number is a hyperlink to **Expense Report**. For more information on the **Expenses Module**, click [here](#).
- M. **Employee Number** – The employee number of the person the Card is assigned to.
- N. **Action** – This column contains the following action icons:
- **View** – Click the **View**  icon to open the **Purchase Details** page.
 - **Message** – Click the **Message**  icon to open the **Message dialog** where the following options are available.
 - **Internal Chat** – Use this tab to send an internal message to the submitter or approver(s).
 - **Vendor Chat** – Use this tab to send a message to a Vendor or respond to a message.
 - **Upload Receipt** – Click the **Upload Receipt**  icon to quickly attached a receipt to the transaction. For more information on attaching a receipt, click [here](#).
- O. **Toggle Filter** – Click the **Toggle Filter**  icon to turn the grid filters on or off. Users can also rearrange, add, or delete columns based on business need.

Rebates Tab

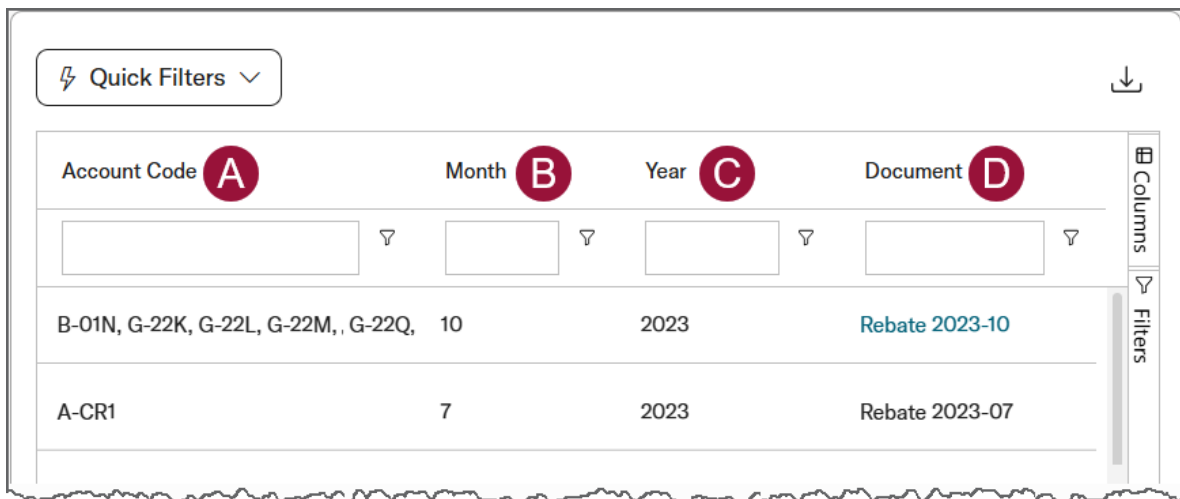
The **Rebates tab** in the **Cards Module** is available to Admin users and is used to view Rebate statements organized by calendar month.

This tab provides visibility into any rebate amounts earned through your Corpay card programs. Statements are grouped monthly, making it easy to review earned rebates over time for reporting or reconciliation purposes.

From the **Cards Module Dashboard**, click the **Rebates** tab.



Rebates Grid



The screenshot shows the Rebates Grid interface. At the top left is a 'Quick Filters' button with a lightning bolt icon and a dropdown arrow. At the top right is a download icon. Below these is a table with the following columns: Account Code (labeled A), Month (labeled B), Year (labeled C), and Document (labeled D). Each column has a dropdown arrow. To the right of the table is a vertical sidebar with 'Columns' and 'Filters' sections, each with a corresponding icon. The table contains two rows of data:

Account Code	Month	Year	Document
B-01N, G-22K, G-22L, G-22M,, G-22Q,	10	2023	Rebate 2023-10
A-CR1	7	2023	Rebate 2023-07

Please note that **all columns** in this section are **customizable** by clicking the **Toggle Filter** icon.

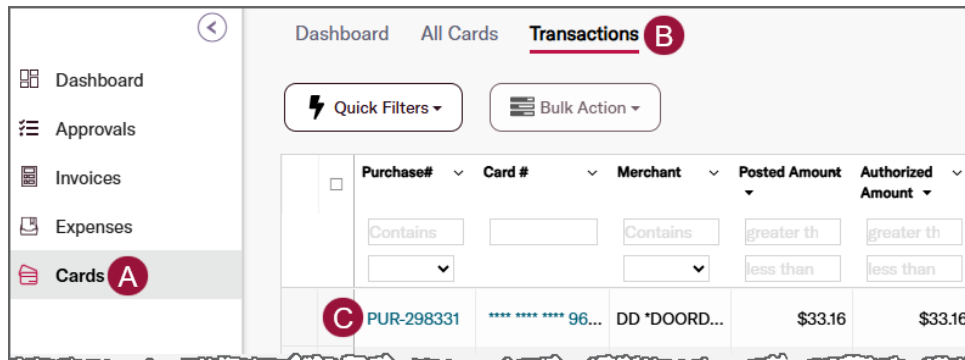
- A. **Account Code** – This column displays the **Corpay account code(s)** associated with the rebate statement. It identifies which card account or group of accounts earned the rebate. In some cases, multiple account codes may appear in a single row when rebates are consolidated for several related accounts.

- B. **Month** – This column shows the **calendar month** in which the rebate was earned. Rebate statements are organized monthly to make it easy to track earned rebates over time for reconciliation and reporting purposes.
- C. **Year** – This column indicates the **calendar year** corresponding to the rebate month. Together with the Month column, it defines the exact period the rebate statement covers.
- D. **Document** – This column provides a **clickable rebate statement document** for the selected account, month, and year.

Purchase Details

This section explains how to **read and navigate the Purchase Details** screen, including its various fields, sections, and tabs.

1. To navigate to the **Purchase Details**, complete the following:



- A. Select the **Cards Module**.
- B. Click the **Transactions** tab.
- C. Click the **blue hyperlink** in the **Purchase #** column.

General Info Tab

Transaction / Purchase Details

PUR-309281 ✓ PAID

P Upload Receipt Q Message

General Info Accounts

A Issued To	PAUL CARDHOLDER	I Transaction ID	591e404a-6c42-419d-8fcf-7c2472fdbd2f
B Authorization Date	12/09/2024 8:08 PM CST	J External Id	
C Posted Date	12/10/2024 6:49 AM CST	K MCC Category	7523 - Automobile Parking Lots and Garages
D Transaction Type	DEBIT	L Memo	
E Merchant	METROPOLIS PARKING	M Subsidiary	110200 - Comdata Inc.
F Currency Code	USD	N Approval Number	928915
G Amount	\$9.99	O Expense Item	18890007
H Card	**** * * * *		

- A. **Issued To** – The name of the person the Card is issued to.
- B. **Authorization Date** – The time and date the transaction was run.
- C. **Posted Date** – The time and date the transaction was settled (The funds from the transaction are transferred from the cardholder’s Card balance to the merchant’s account).
- This field will be blank until the transaction settles.
- D. **Transaction Type** – This field will read **Debit** or **Credit**.
- **Debit** – The amount was deducted from the Card.
 - **Credit** – The amount was added, or credited, back to the Card.
- E. **Merchant** – The name of the Vendor receiving payment.
- F. **Currency Code** – A three-letter code that represents a currency. Information about currency codes and their corresponding countries can be found by searching “currency codes” on any web browser.
- G. **Amount** – The amount of the transaction.
- H. **Card** – The last four digits of the Card number used in the transaction. This number is a hyperlink to the [Card Details](#) screen.
- I. **Transaction ID** – The number assigned in Corpay Complete to the transaction. This number is a hyperlink to the [Transaction Details](#) screen.

- J. **External Id** – Displays the transaction’s internal id number from the Client’s ERP.

- K. **MCC Category – (Merchant Category Codes)** A four-digit code assigned by Mastercard to merchants’ point-of-sale devices, classifying them according to the types of goods or services they provide.

- L. **Memo** – This field is not used by many customers.

- M. **Subsidiary** – The name of the subsidiary, if applicable.

- N. **Approval Number** – The approval number for the **pre-auth** amount.
 - Currently, Corpay Complete does NOT show the approval number for the settlement amount.

- O. **Expense Item** – The number assigned in Corpay Complete to the expense. This number is a hyperlink to the **Expense Item Details** screen.

- P. **Upload Receipt** – Click this button to attach a receipt to the transaction.
 - For more information on attaching a receipt, click [here](#).

- Q. **Message** – This button opens the **Message dialog** window. For more information on Messages, click [here](#).

Approval Workflow

To navigate to the **Approval Workflow**, stay on the **Purchase Details** screen and scroll down.

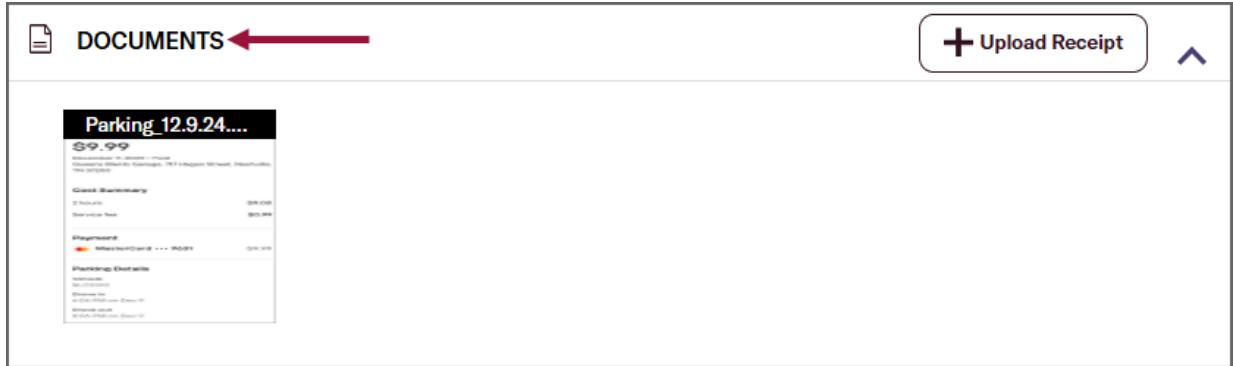
This **Approval Workflow** of the **Purchase Details** is not typically used by customers.

APPROVAL WORKFLOW					
Approval Steps	Last Updated Date	Approved Date	Rejected Date	Approvers	Status
There are no approvers					

Documents

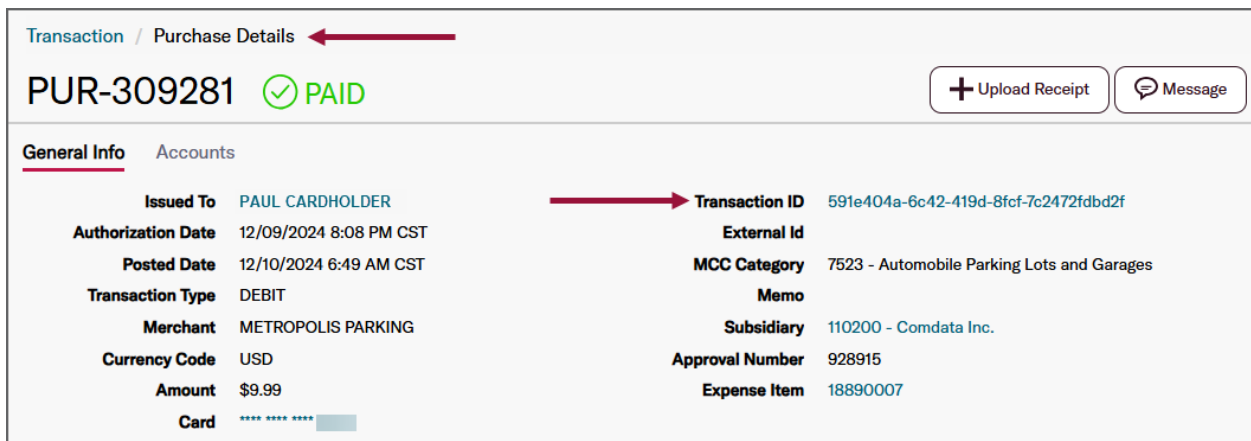
To navigate to the **Documents**, stay on the **Purchase Details** screen and scroll down.

Cardholders can click the **Upload Receipt** button and upload any **documentation** type **that is relevant to the purchase, including receipts**. For more information on attaching a receipt, click [here](#).



Transaction Details

To navigate to the **Transaction Details**, click the **blue hyperlink** in the **Transaction ID** field on the **Purchase Details** screen.



This section explains how to **read and navigate the Transaction Details** screen.

The screenshot shows the 'Transaction / Transaction Details' screen. At the top, the transaction ID '5123170a-a36f-48e1-8517-5023955a3ce99999131' is displayed next to a green 'PAID' status icon. Below this, a list of transaction details is shown, with callout letters A through O pointing to specific fields:

A	Transaction Type	DEBIT	I	Card	**** * 1234
B	Authorization Date	07/06/2025 10:03 AM CDT	J	Reference Number	PUR-1117220
C	Posted Date	07/06/2025 10:03 AM CDT	K	Transaction Currency	USD
D	Merchant	MOONSTAR RESTAURANT	L	Statement Period	-
	Merchant External ID		M	External Id	5123170a-a36f-48e1-8517-5023955a3ce99999131
E	ID Match Number	20030501	N	Status	CLEARED
F	Authorized Amount	\$146.57		Status Details	
G	Posted Amount	\$146.57	O	Approval Number	197601
H	PO #				

- A. **Transaction Type** – This field will read **Debit** or **Credit**.
- **Debit** – The amount was deducted from the Card.
 - **Credit** – The amount was added, or credited, back to the Card.
- B. **Authorization Date** – The date the transaction was run.
- C. **Posted Date** – The time and date the transaction was settled (The funds from the transaction are transferred from the cardholder’s Card balance to the merchant’s account).
- D. **Merchant** – The name of the Vendor receiving payment.
- E. **ID Match Number** – The data in this field comes in with the transaction date from the merchant.
- F. **Authorized Amount** – The amount the merchant requested be removed from the cardholder’s balance, effectively reserving that amount until the transaction settles.
- G. **Posted Amount** – The amount that was settled (The exact amount of funds that were transferred from the cardholder’s Card balance to the merchant’s account).
- H. **PO#** – The PO number attached to the transaction, if applicable.

- I. **Card** – The last four digits of the Card number used in the transaction. This number is a hyperlink to the [Card Details](#) screen.

- J. **Reference Number** – The number assigned in Corpay Complete to the purchase. This number is a hyperlink to the [Purchase Details](#) screen.

- K. **Transaction Currency**– A three-letter code that represents a currency. Information about currency codes and their corresponding countries can be found by searching “currency codes” on any web browser.

- L. **Statement Period** – The invoice statement date that the transaction is on.

- M. **External Id** – Displays the transaction’s internal id number from the Client’s ERP.

- N. **Status** – The status of the transaction.
 - **Authorized** – The transaction has been approved but not settled.

 - **Declined** – The transaction was declined. Click here to view more information on [Reasons for Decline](#).

 - **Cleared** – The transaction was approved and settled by the merchant.

 - **Expired** – The transaction was not settled by the merchant within 30 days.
 - The pre-auth amount holds the determined amount of funds until the authorization expires; any pre-auth amount goes back to the Card.

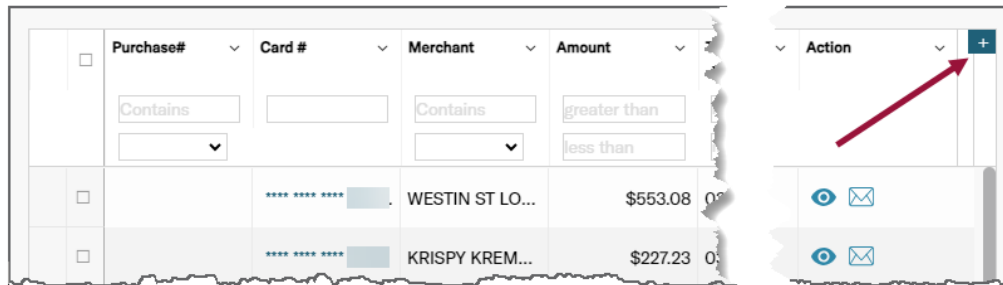
 - The Card is not “charged” for the transaction until the transaction settles; therefore, the full amount of the transaction **never left the Card**.

- O. **Approval Number** – The approval number for the pre-auth amount.
 - Currently, Corpay Complete does NOT show the approval number for the settlement amount.

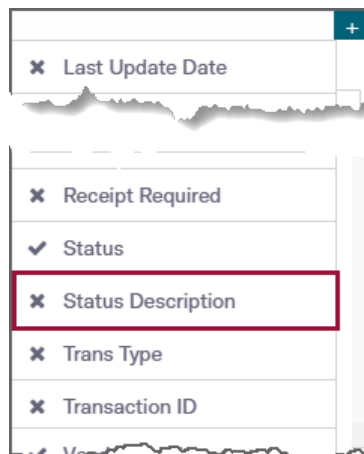
Card Decline Reasons

When viewing **Declined** transactions, make sure the **Status Description** column is added to the view.

1. From the **Cards Module > Transactions** tab, click the small **Column Editor** on the far right of the Transaction grid.



2. From the **Filter Selection** list, scroll down and click **Status Description**. This will add the column to your transaction list view.



3. Users can now view the pertinent transaction information such as **Card Number**, **Amount**, **Cardholder**, and the **Status Description** which will contain the **Reason for Decline**.

Card #	Merchant	Amount	Transaction Date	Status	Status Description	Issued To	Category
Contains	Contains	greater than	mm/dd/yyyy	Decline			
		less than	mm/dd/yyyy				
**** *...	WESTIN ST ...	\$553.08	03/19/2024...	DECLINED	54: CARD IS NOT ACTIVE. VERIFY CARD STATUS AND ACTIVATE CARD	Jonathan	3513 - Westi...
**** *...	KRISPY KRE...	\$227.23	03/18/2024...	DECLINED	787: CYCLE AMOUNT LIMIT EXCEEDED. VERIFY AMOUNT AND ADJUST LIMIT	Dennis	5814 - Fast ...
**** *...	EZPASS RE...	\$38.33	03/16/2024...	DECLINED	54: CARD IS NOT ACTIVE. VERIFY CARD STATUS AND ACTIVATE CARD	Michael	4784 - Bridg...

Review the table below for **Common Decline Reasons** and additional notes and explanations:

For more **information on handling declines**, click [here](#) to navigate to the **Card Management** section of this guide.

Decline Reason	Notes
54: Card is not active. Verify Card status and activate Card.	The Card is not active . (This can occur for several reasons.) Contact the System Administrator to activate the Card.
784: Expiration date error. Verify expiration date or use new Card.	The Card's expiration date was entered incorrectly , or the Card has expired , and a new Card is needed.
785: Transaction amount limit exceeded. Verify amount and adjust limit.	The transaction amount available on the Card is lower than the amount the Card is being run for.
786: Daily amount limit exceeded. Verify the amount and adjust limit.	The daily amount available on the Card is lower than the amount the Card is being run for.
787: Cycle amount limit exceeded. Verify amount and adjust limit.	The amount available on the Card's cycle limit is lower than the amount the Card is being run for
788: Daily transaction count exceeded. Adjust daily transaction count.	The number of daily transactions (Card swipes) on the Card has been exceeded.
789: Cycle transaction count exceeded. Adjust cycle transaction count.	The number of transactions (Card swipes) on the Card's cycle limit has been exceeded.
939: MCC is not available for use. Verify usage limits and adjust Card profile.	The MCC being used for the transaction is not available on the Card.
1097: International Purchases Not Allowed	This Card profile does not allow international purchases .
1098: Internet Purchases Not Allowed	This Card profile does not allow internet purchases .
1100: Enhanced Risk Monitoring Decline	The Card has been flagged for potential risk or fraud and will decline all future transactions until further action is taken. Customers should contact their Account Manager or Relationship Manager at accountmanagement@corpay.com for next steps.

Card Management

This section provides an overview of the key functionalities and tasks related to managing Physical and Ghost Cards within the Corpay Complete platform.

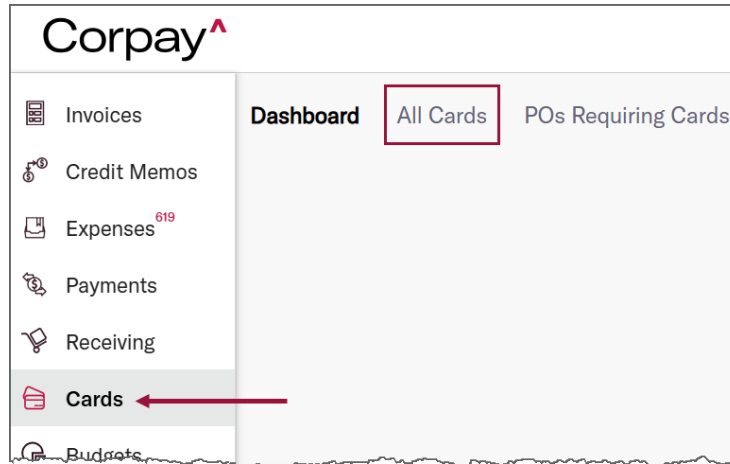
IMPORTANT

For iConnectData users, all card updates must be made in Corpay Complete. Changes made directly in iConnectData will not be reflected, as information flows one way—from Corpay Complete to iConnectData.

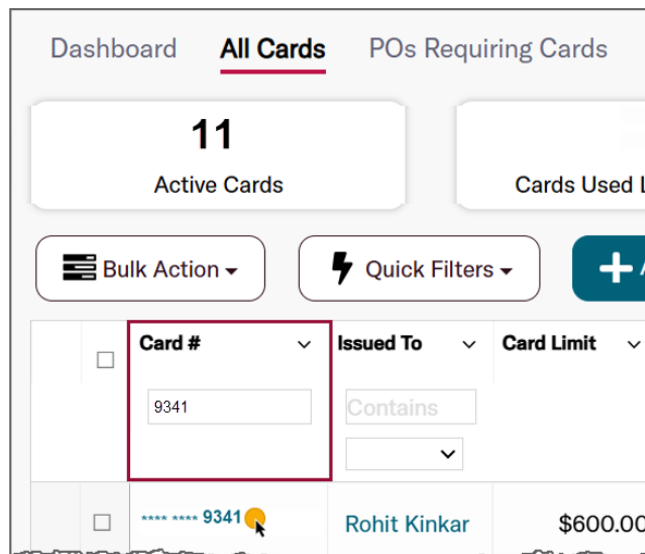
Check a Card's Status

To check a Card's status:

1. Navigate to the **Cards** Module and click the **All Cards** tab.

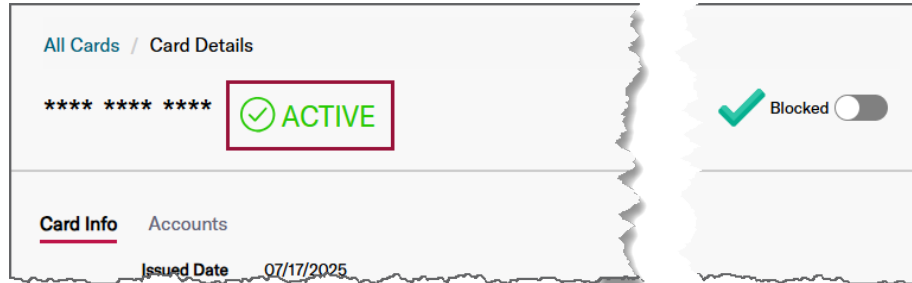


2. Search for the Card number by keying in the last 4 digits of the Card into the **Card #** field. Click the **blue hyperlink** of the Card number.



3. Read the top of the **Card Details** page to determine the next step.

- **If the Card is Active** – The word **Active** will be at the top of the page, and the **Blocked** toggle will be gray.



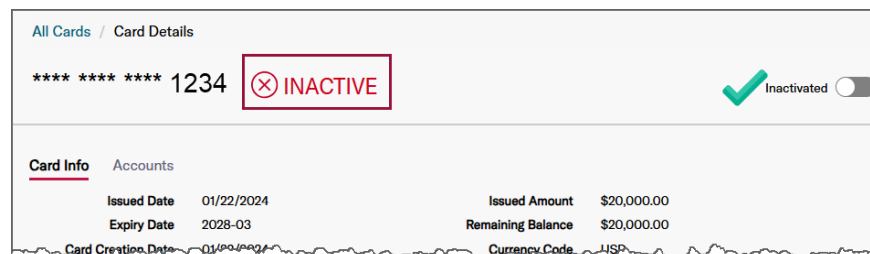
- **If the Card is Blocked** – The word **Blocked** will be at the top of the page and the **Blocked** toggle will be green.

- If a Card is **Blocked**, click [here](#) for instructions to **activate a Card**.



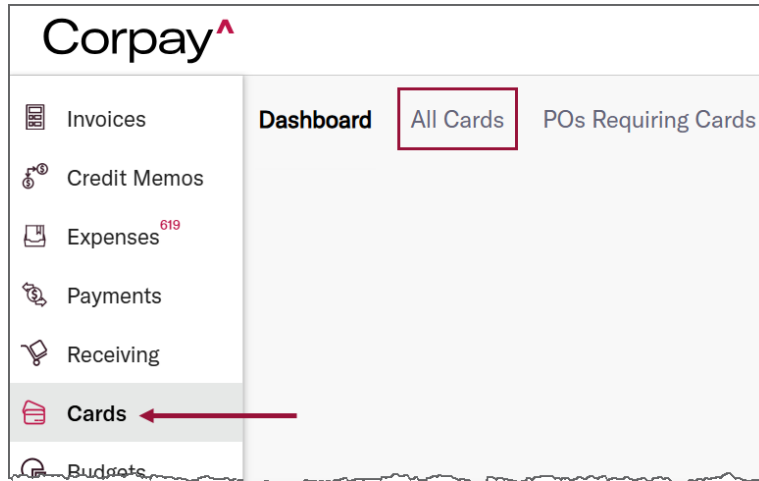
- **If the Card is Inactive** – The word **Inactive** will be at the top of the page, and the **Inactivated** toggle will be gray.

- If a Card is **Inactive**, a new Card must be ordered. Click [here](#) to order a new Card.

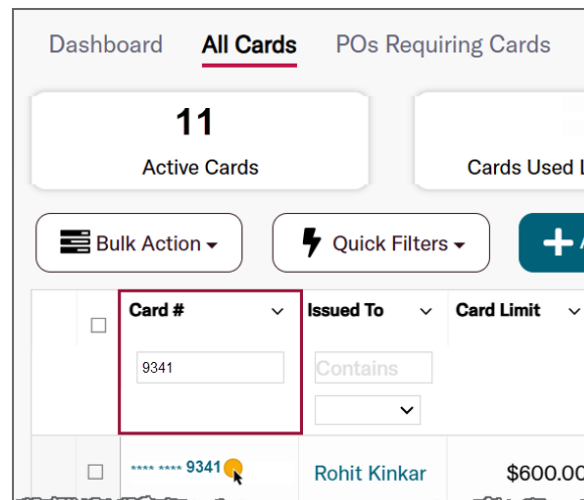


Activate a Card

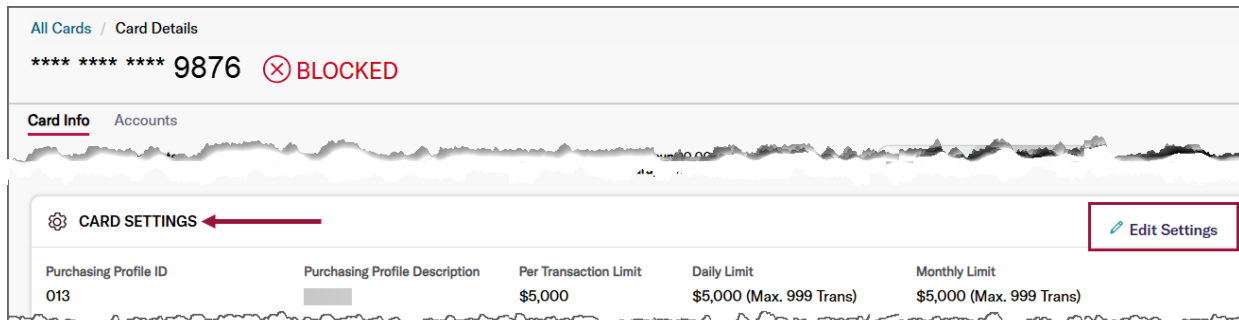
1. Navigate to the **Cards** Module and click the **All Cards** tab.



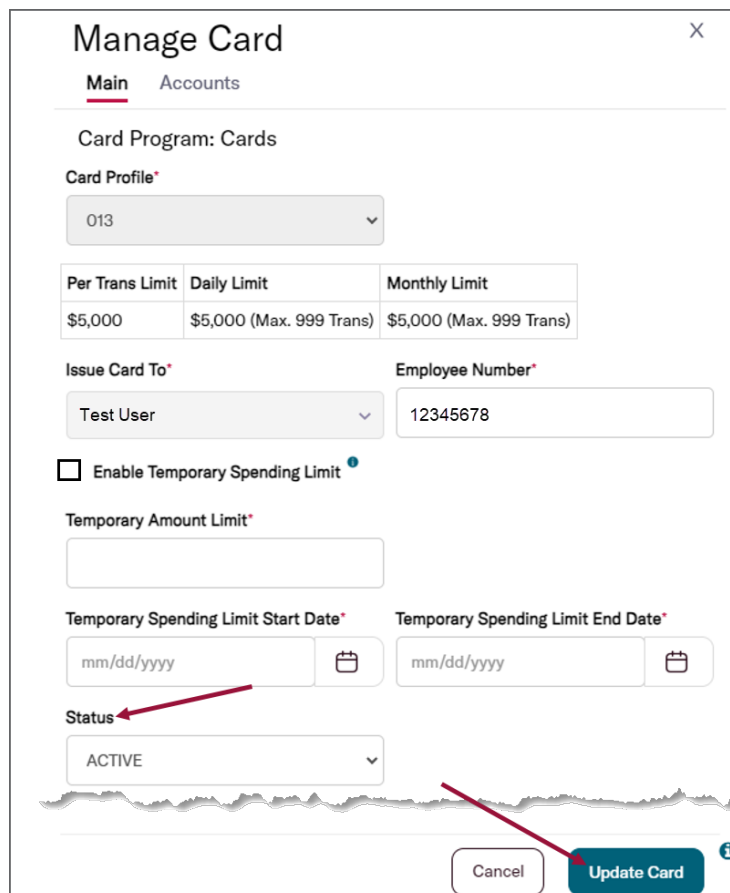
2. Search for the Card number by keying in the last 4 digits of the Card into the **Card #** field. Click the **blue hyperlink** of the Card number.



3. Staying on the **Card Details** page, scroll down to the **Card Settings** section. On the right side of the screen, click **Edit Settings**.



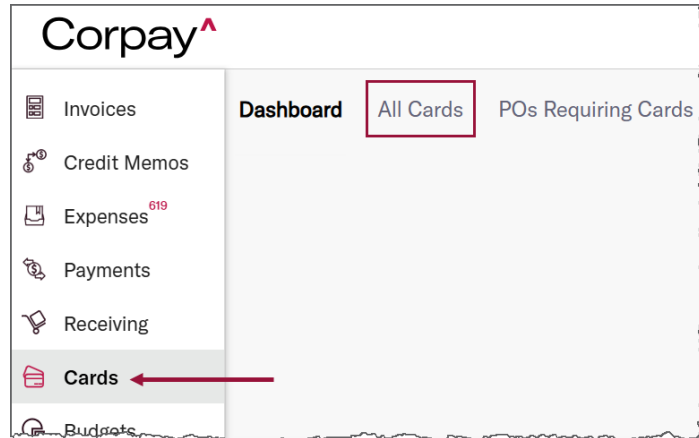
4. Scroll down to the **Status** field. Use the drop-down arrow to select **Active**. Click **Update Card**.



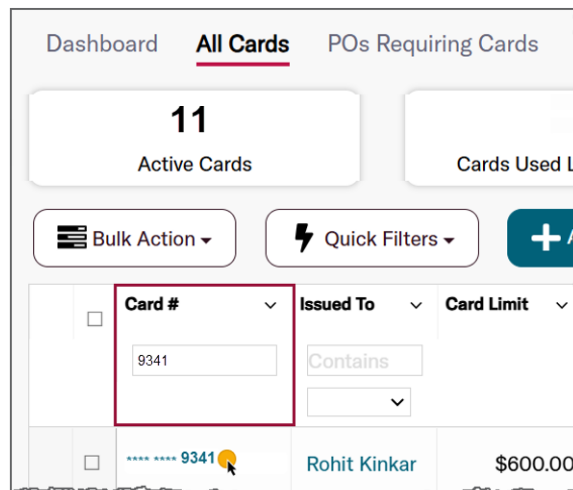
Block a Card

To Block a Card:

1. Navigate to the **Cards** Module and click the **All Cards** tab.



2. Ask the cardholder for the last 4 digits of the Card number. Search for the Card number by keying in the last 4 digits of the Card into the **Card #** field. Click the **blue hyperlink** of the Card number.



3. From the **Card Details**, navigate to the **Blocked** toggle. Move the toggle to the right.



4. When the Card is **blocked successfully**:

- The **Blocked** toggle will be green.
- A **Success message** will appear in the top right corner of the screen.
- The **status** of the Card will change to **Blocked**.

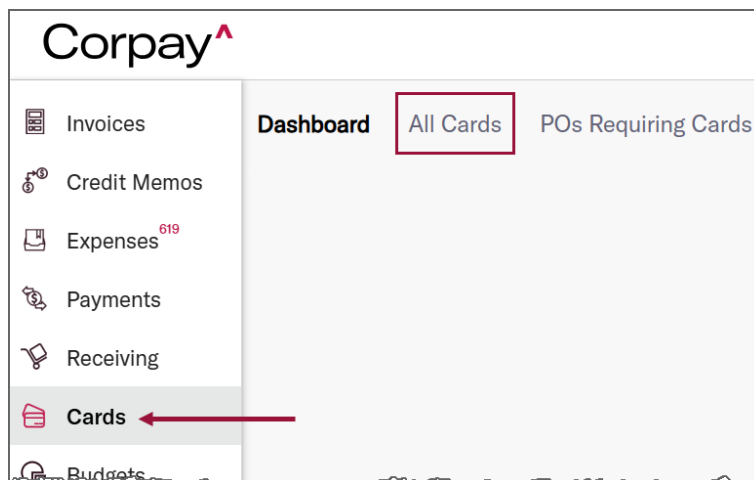


Enable a Temporary Block

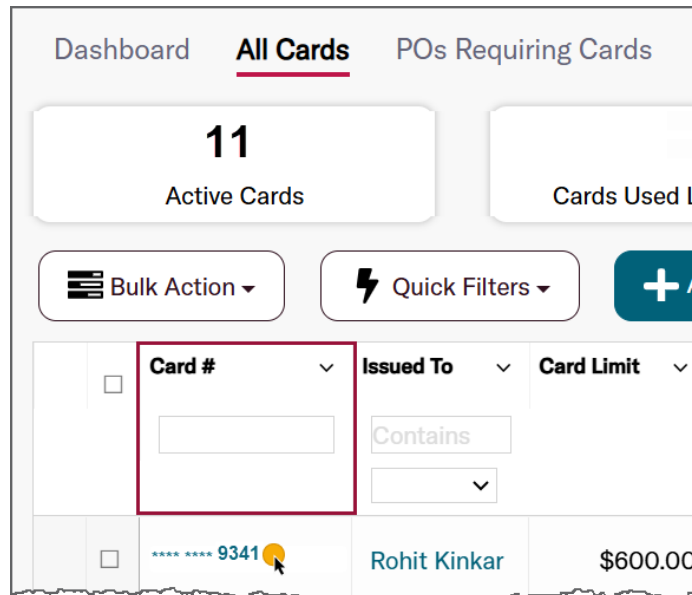
A **temporary block** has a **set end date** but can be lifted early if needed. A regular [Card block](#) has no specified end date and can be reactivated anytime.

To **temporarily block a Card**, follow the steps in this section.

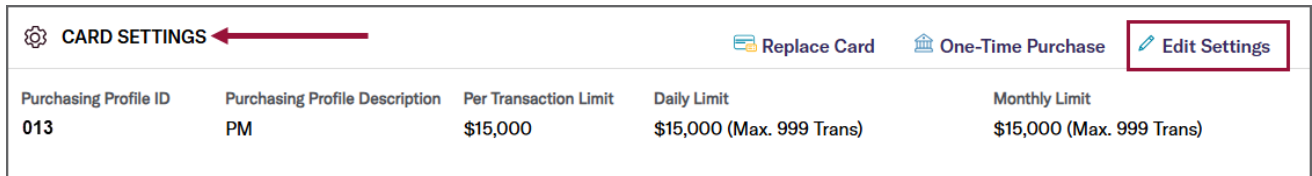
1. Navigate to the **Cards** Module and click the **All Cards** tab.



2. Search for the Card number using the **Card #** field. Click the **blue hyperlink** of the Card number.



3. Scroll down to the **Card Settings** section. Click **Edit Settings**.



4. On the **Manage Card** screen, complete the following:
- Scroll down and **check** the **Enable Temporary Block** checkbox.
 - Key in the **start** and **end date** of the temporary block
 - Click **Update Card**.

Manage Card X

Main Accounts

Card Program: Comdata Physical

Card Profile* Card Type*

013 Multi Use

Issue Card To* Employee Number*

Test User 12345678

Card Balance Type* Spending Limit per Month*

Monthly \$ 15,000

Enable Temporary Spending Limit [?]

Status

ACTIVE

Enable Temporary Block [?]

Temporary Block Start Date* Temporary Block End Date*

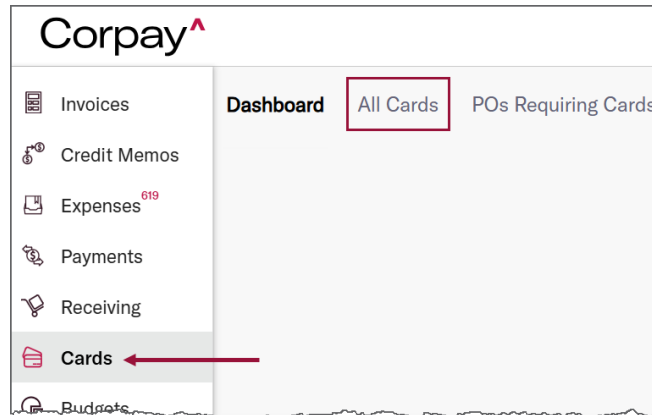
05/05/2025 05/08/2025

Cancel **Update Card**

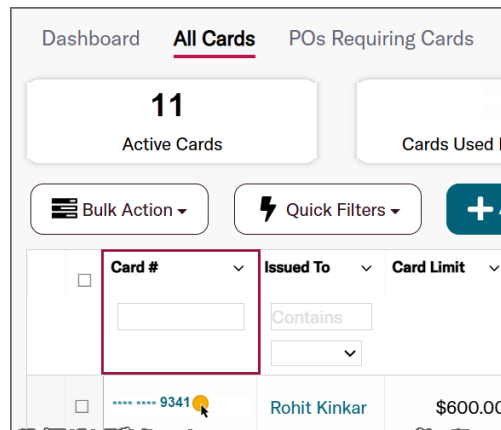
Remove a Temporary Block

If the Card has a **temporary block**, follow the steps in this section to **remove** the temporary block:

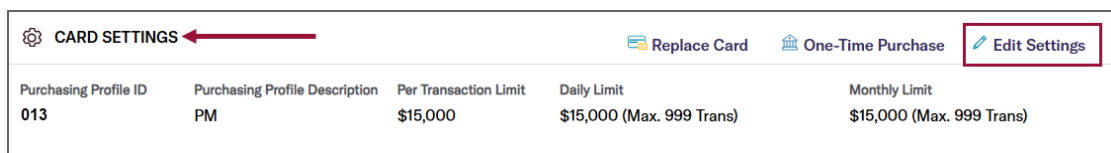
1. Navigate to the **Cards** Module and click the **All Cards** tab.



2. Search for the Card number using the **Card #** field. Click the **blue hyperlink** of the Card number.



3. Scroll down to the **Card Settings** section. Click **Edit Settings**.



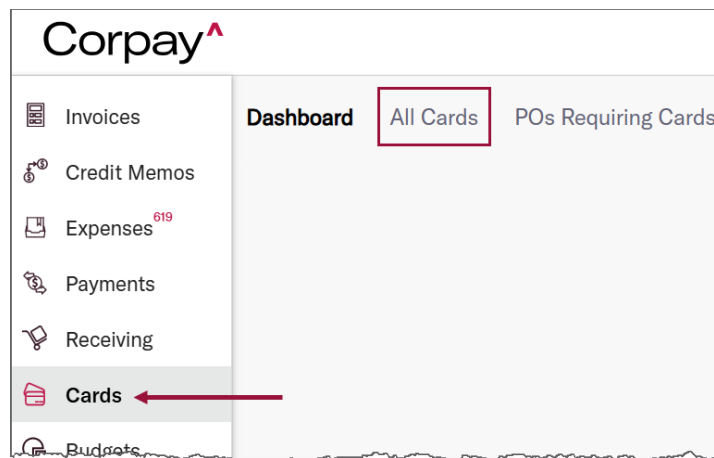
4. On the **Manage Card** screen, scroll down and **Uncheck** the **Enable Temporary Block** box. Click **Update Card**.

The screenshot shows the 'Manage Card' interface. At the top, there are tabs for 'Main' and 'Accounts'. Below that, it says 'Card Program: Cards' and 'Card Profile*' with a dropdown menu showing '013'. A table displays limits: Per Trans Limit (\$15,000), Daily Limit (\$15,000 (Max. 999 Trans)), and Monthly Limit (\$15,000 (Max. 999 Trans)). Below the table, there are fields for 'Issue Card To*' (Test User) and 'Employee Number*' (12345678). A checkbox for 'Enable Temporary Spending Limit' is checked. The 'Status' dropdown is set to 'ACTIVE'. The 'Enable Temporary Block' checkbox is unselected and highlighted with a red box. At the bottom right, there are 'Cancel' and 'Update Card' buttons, with the 'Update Card' button also highlighted with a red box.

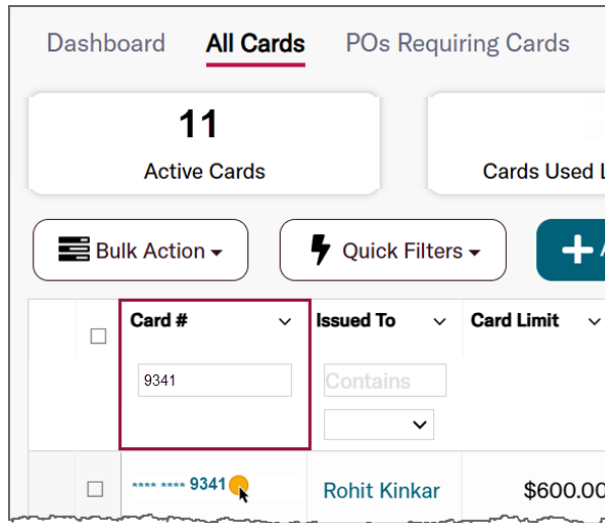
Per Trans Limit	Daily Limit	Monthly Limit
\$15,000	\$15,000 (Max. 999 Trans)	\$15,000 (Max. 999 Trans)

Confirm Available Limit

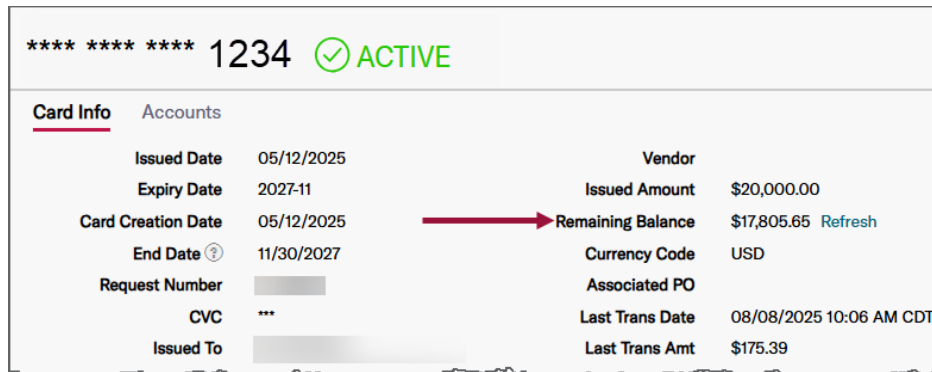
1. Navigate to the **Cards** Module and click the **All Cards** tab.



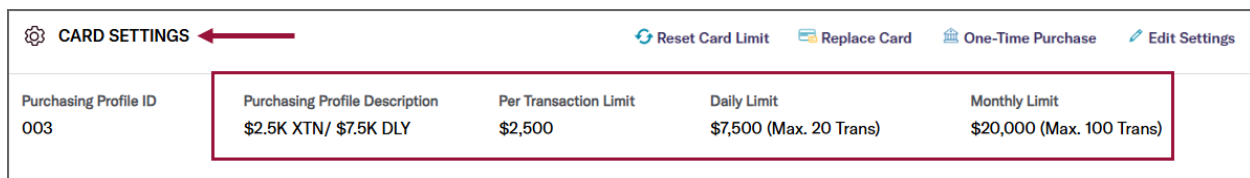
- Search for the Card number by keying in the last 4 digits of the Card into the **Card #** field. Click the **blue hyperlink** of the Card number.



- The remaining balance can be viewed on the **Card Details** screen in the **Remaining Balance** field.

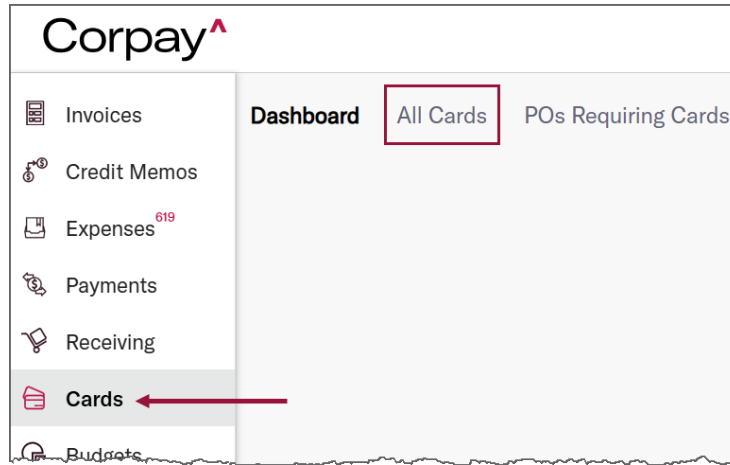


- To view information regarding **Card limits**, remain on the **Card Details** screen and scroll down to the **Card Settings** section for specific limit details.
 - For assistance reading the fields in this section, click [here](#) to access the **Card Settings** section of this manual.

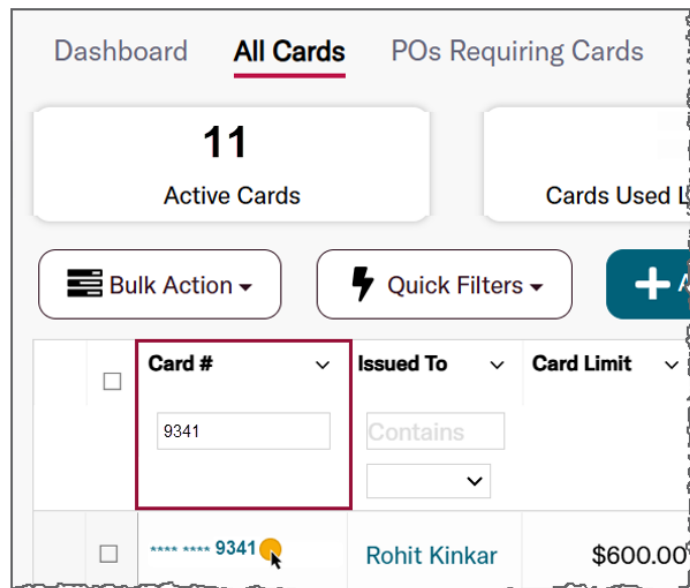


View Transaction History

1. Navigate to the **Cards** Module and click the **All Cards** tab.



2. Search for the Card number by keying in the last 4 digits of the Card into the **Card #** field. Click the **blue hyperlink** of the Card number.



3. On the **Card Details** screen, scroll down to the **Transactions** section and locate the transaction in question.

Purchase #	Trans Type	Date	Merchant	Category	Status	Amount	Actions
PUR-1005426	CREDIT	06/16/2025	KINGSTON HOTEL (ST2780)	7011	CLEARED	-\$100.00	👁️
PUR-971649	DEBIT	06/09/2025	AUTOZONE #3172	5533	CLEARED	\$121.94	👁️

View All

- A. **Purchase #** – The number created and assigned by Corpay Complete to the purchase. Click the purchase number to navigate to the [Purchase Details](#) section of this guide.
- B. **Trans Type** –
- **Credit** – An amount was credited to the Card.
 - **Debit** – An amount was withdrawn from the Card.
- C. **Date** – (Authorized Date) The date the transaction was run.
- D. **Merchant** – The name of the Vendor receiving payment.
- E. **Category** – The four-digit code assigned by Mastercard, along with a description of the MCC code under which the transaction was processed.
- F. **Status** – The status of the transaction.
- **Authorized** – The transaction has been approved but not settled.
 - **Declined** – The transaction was declined. Click [here](#) to view more information on **Reasons for Decline**.
 - **Cleared** – The transaction was approved and settled by the merchant.
 - **Expired** – The transaction was not settled by the merchant within 30 days.
 - The pre-auth amount holds the determined amount of funds until the authorization expires; any pre-auth amount goes back to the Card.
 - The Card is not “charged” for the transaction until the transaction settles; therefore, the full amount of the transaction never left the Card.

- G. **Amount** – The amount of the debit or credit.
- H. **Actions** – Click the **View icon** to view [Transaction Details](#) for the purchase.
- I. Click **View All** to navigate to the **Transactions Tab**. Click [here](#) to learn more about this tab.

Transaction Types

The following table contains descriptions of the different transaction types that display in Corpay Complete:

Transaction Type	Description
Authorization	Authorizations are charges that have been processed by the merchant but have not yet been settled. These transactions have a status of AUTHORIZED .
Settled Transaction	Settled transactions are charges that have been fully processed and settled, meaning the merchant has received the funds. These transactions may also be referred to as CLEARED or POSTED transactions. These terms are used interchangeably and represent the same transaction state. These transactions have a status of CLEARED .
Declined Transaction	Declined transactions are authorizations that were not approved and therefore did not complete successfully. The reason for the decline can be found on the Transaction Details page. These transactions have a status of DECLINED . <i>Note: The term <i>declined</i> is used instead of <i>rejected</i>, as declined transactions reflect authorization failures and do not impact downstream transaction status or settlement.</i>
Credit	Credits represent reversed charges, refunds, or Easy Savings discounts. These transactions appear in the Transactions grid as CLEARED transactions. Payments made against the statement do not appear as credits in the Transactions grid.

Associate an Existing Card to a Purchase Order

1. Navigate to the **Cards** Module and click the **All Cards** tab.
2. From **All Cards** grid, select the applicable card you wish to associate to a Purchase Order. Then navigate to the **Action** column and click on the edit (✎) icon corresponding to the selected card. This will take you to the **Manage Card** window.

Card #	Issued To	Card Limit	Available Balance	Status	Card Program Type	Card Program Name	Issued Date	Action
**** * 5459	Trina Arjil Ac...	\$80,000.00	\$80,000.00	ACTIVE	PHYSICAL	Comdata Phy...	02/13/2026	
**** * 9007	A12547 Truck	\$0.00	\$0.00	ACTIVE	FLEET VEHIC...	FLEET Vehicl...	02/13/2026	
**** * 6473	Trina Arjil Ac...	\$800,000.00	\$800,000.00	ACTIVE	GHOST	Comdata Ghost	02/13/2026	

- You may also associate a PO to a card from the **Card Details** page by clicking on the **Edit Settings** link found in the **Card Settings** section.

All Cards / Card Details

**** * 9608 ✓ ACTIVE Blocked

Receipt is required for purchases over \$5 and can be uploaded on the purchase detail page.

Card Info Accounts

Subs...y

Billing Address Testing the card Testing the card Testing the Card 2131 city, Shkoder 9087 ALB

Description

CARD SETTINGS Reset Card Limit Replace Card Edit Settings

- The above step will open the **Manage Card** window.

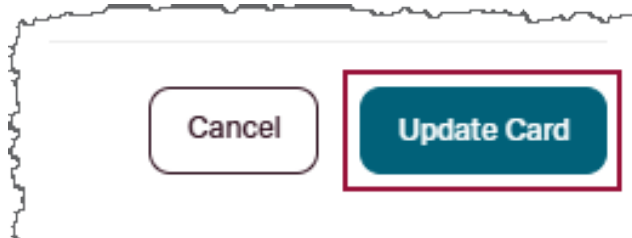
3. In the **Manage Card** window, complete all applicable fields. Then, in the **Purchase Order** field at the bottom of the window, either enter the purchase order number manually or select the appropriate PO associated with the cardholder from the drop-down list.

The screenshot shows the 'Manage Card' window with the following fields and values:

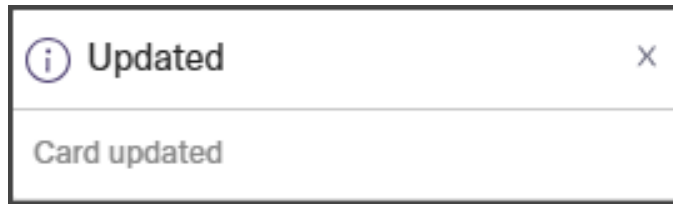
- Card Program:** Comdata Ghost
- Card Profile:** 000 - CUSTOM
- Card Type:** Multi Use
- Issue Card To:** Hanna Admin
- Employee Number:** 460551265
- Subsidiary:** Corpay Complete
- Department:** -- Select Department --
- Purchase Order:** PO-102174
- Misc #1:** Enter up to 15 characters
- Misc #2:** Enter up to 15 characters

At the bottom right, there are two buttons: 'Cancel' and 'Update Card'. The 'Update Card' button is highlighted with a red border.

4. Once done, click on the **Update Card** button at the bottom-right of the window.

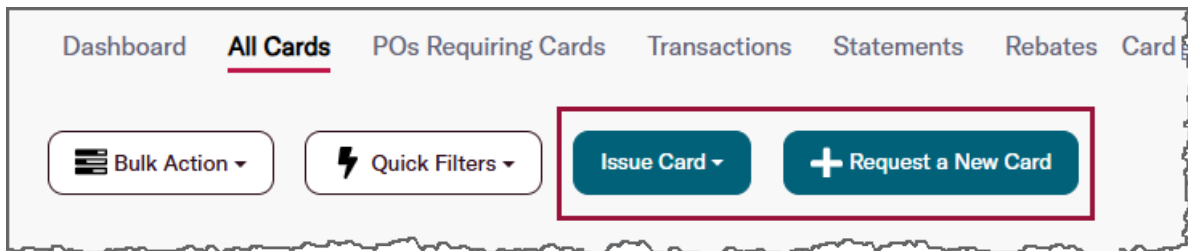


5. You will receive confirmation that the card update was successful.



Request or Order a Card

Admins can order a new Card, while **cardholders can request** a new Card, both using the Corpay Complete platform.



- Click [here](#) to navigate to the **Request a New Card** instructions.
- Click [here](#) to navigate to the **Order a New Card** instructions.

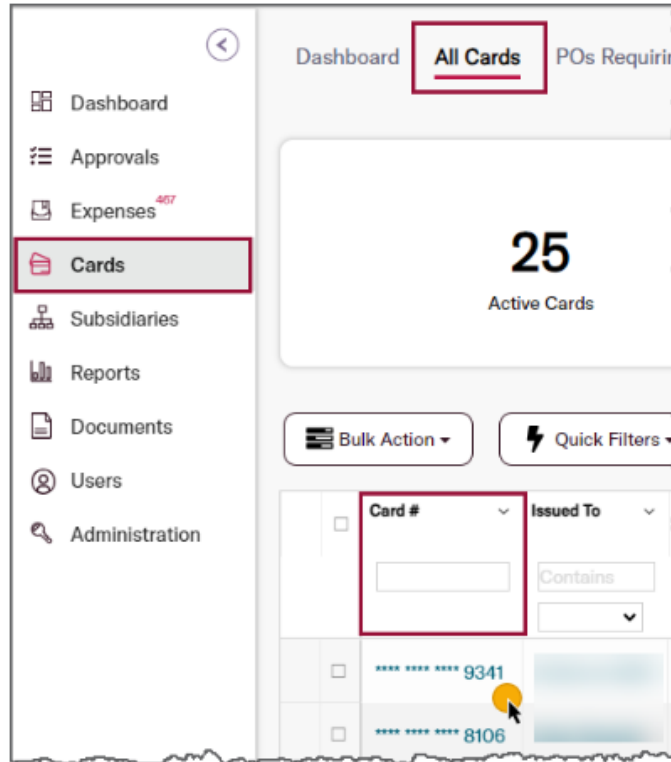
Order a New Card



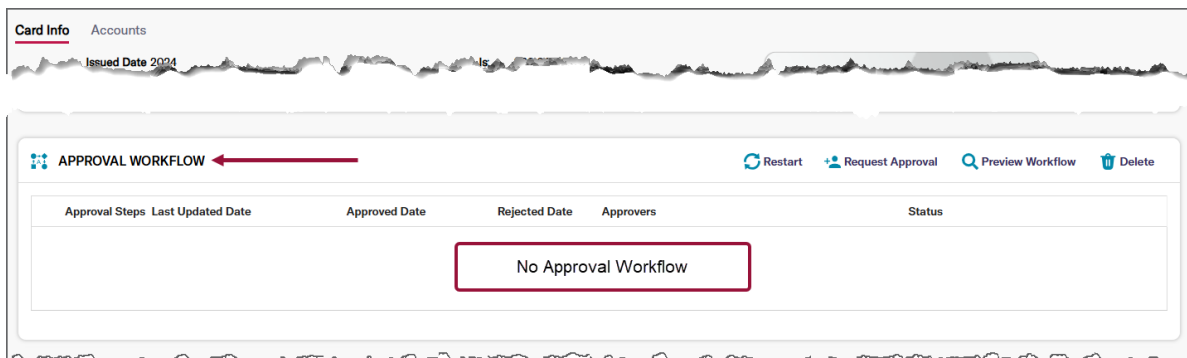
The user being assigned the Card must be in Corpay Complete. If the user is not in Corpay Complete, the Card cannot be ordered.

To add a user to Corpay Complete, click [here](#) to navigate to the Knowledge Base article **Creating a New User and Sending a Welcome Email**.

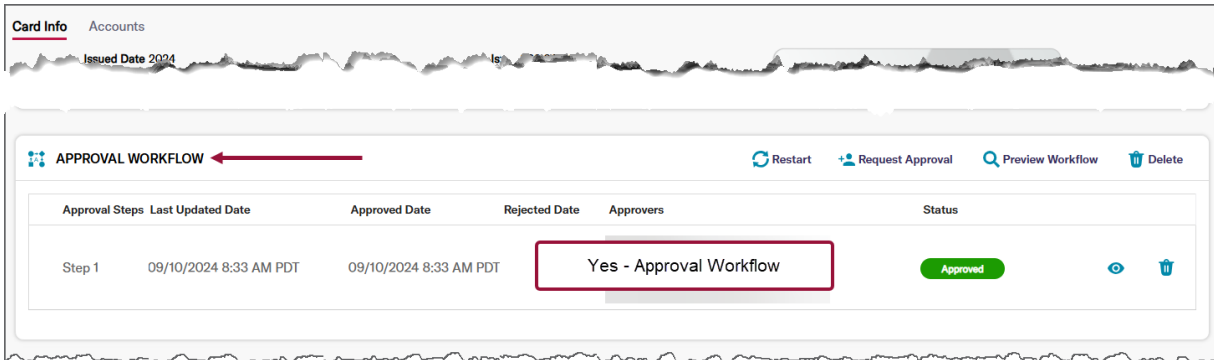
1. From the **Cards** Module, click **All Cards**. Use the **filters** to find the Card and click on the **blue Card number hyperlink**.



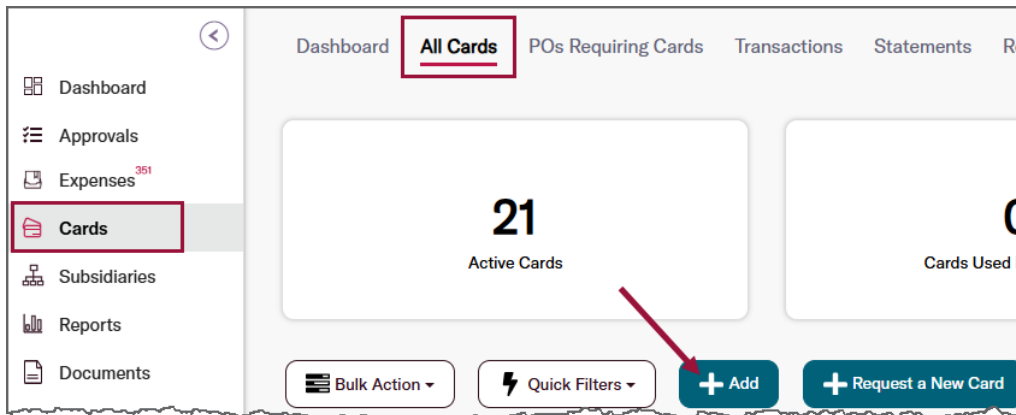
2. On the **Card Info** screen, scroll down to the **Approval Workflow** section and read the screen. Note whether you are using an approval workflow, then proceed to the next step.
 - If there is **no information** in the **Approval Workflow** section, your Company is NOT using a workflow.



- If there is **information** (see screen shot below) in the **Approval Workflow** section, your Company IS using a workflow.



3. Return to the **Cards** Module > **All Cards** tab. Click the **+Add** button.



4. **Complete the following fields to order a Card.** Detailed descriptions of each field are found on the following pages.



The fields required to order a Card differ depending on how the Company is set up in Corpay Complete. For example, some profiles / Cards may have a monthly cycle limit, while others may use a declining balance.

Use this section to complete the fields **shown on your screen**.

Issue Corporate Card ✕

Main Accounts

Card Program Card Program Description

DFRHR - Physical Cards ▼

Issue Card To*

Test User ▼

Card Balance Type* Total Spending Limit*

▼ \$ 0

Duration*

Status

PENDING ▼


Description

Selecting this card program will generate a physical card.

Ship this card to* Shipping Type*

Select/search the list ▼ ▼

New +

External ID  Link to Existing Vendor

Search for vendor by name ▼

Subsidiary

✕ ▼

Department Purchase Order

-- Select Department -- ▼ search/select po ▼

*Required fields are denoted with a red asterisk.

Card Program – Choose the Card program for the Card.

Card Profile – Select the profile the Card needs to adhere to. After choosing the Card profile, a table below the field will show the transaction limit, daily limit, and monthly limit of the profile selected.

- If profile 000 is chosen, the Card limits will need to be set manually.

Issue Card To – Key in the name of the cardholder. **The user will already need to be set up in Corpay Complete.**

Employee Number – After selecting the cardholder's name, this field will automatically populate.

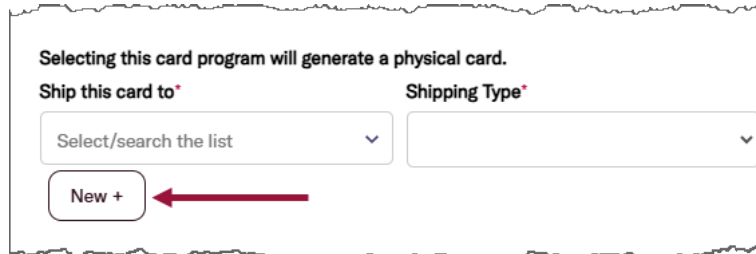
- If adding a second, third, or fourth Card for the user, the system will automatically add a 2-digit number to the end of the employee number.
 - For example, if it is the user's second Card, there will be a 22 at the end of the employee number.
- There CANNOT be the same employee number for multiple Cards under the same Cust ID.
- Admins can change the employee number.

Status – Choose one of the following options:

- **Active** – Choose this status if your Company **does not have a workflow approval**. (See step 2 in this section for approval workflows.)
- **Pending** – Choose this status if your Company **has a workflow approval**. (See step 2 in this section for approval workflows.)
 - If a workflow approval is not established, the Card status will change to active once the Card order is approved.
- If the **Card is ordered in any other status**, the **system will NOT order the Card**.
- If the **Card order needs to be canceled**, send an email to accountmanagement@corpay.com.
 - Card orders must be canceled within the **allotted window**.
 - Cards must be in a **blocked status** in Corpay Complete.

Description – This is an optional field for use at the Company’s discretion.

Ship this Card to – Select the address the Card needs to be mailed to. Click the **New+** button to add a new address.



The screenshot shows a form with the following elements:

- Text: "Selecting this card program will generate a physical card."
- Label: "Ship this card to*" with a dropdown menu containing "Select/search the list".
- Label: "Shipping Type*" with an empty dropdown menu.
- Button: "New +" with a red arrow pointing to it from the right.

Shipping Type – Select **USPS** (default) for free shipping. All other options will incur a fee.

- **FedEx Priority Overnight** shipping is \$30.
- **FedEx 2 Day** shipping is \$20 for up to 100 Cards going to the same address, ordered on the same day.
- **FedEx International** shipping is \$80 for up to 100 Cards going to the same address, ordered on the same day.
- At present, tracking emails are not sent from Corpay Complete. Contact your Account Manager at accountmanagement@corpay.com if tracking information is required.

Department – Optional field. This field can be used to **link a Card to a specific department**.

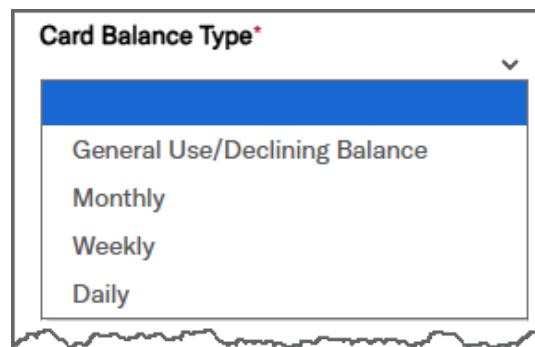
Purchase Order – Optional field. This field can be used to **link the Card to a purchase order (PO)**.

Spending Limit Per Month – Key in the amount that can be run on the Card per **month**.

Spending Limit Per Week – Key in the amount that can be run on the Card per **week**.

Card Balance Type – This option is selected when Admins want the amount on the Card to reset.

- **General Use / Declining Balance** – Select this option if you **do not want the Card amount to reset**. Once the amount is used, the money is gone. A new amount can be reloaded by an Admin.
 - When this option is selected, the **End Date** field populates on the Card order screen.
- **Monthly** – Select this option to set a reoccurring **monthly** limit.
 - When this option is selected, the **Duration in Months** field populates on the Card order screen.
- **Weekly** – Select this option to set a reoccurring **weekly** limit.
 - When this option is selected, the **Duration in Weeks** field populates on the Card order screen.
- **Daily** – Select this option to set a reoccurring **daily** limit.
 - When this option is selected, the **Duration in Days** field populates on the Card order screen.



Total Spending Limit – Key in the **amount of the Card**. Note the amount will reset based on what was chosen in the **Card Balance Type** field.

Duration – This field is used to set a **Card expiration**. Key in the number of months, weeks, or days until the Card amount resets. This field is most frequently **found on Ghost Card** orders, not **Physical Plastic Card** orders.

Duration in Months – This field is used to set a **Card expiration in months**. Key in the number of months until the Card amount will reset. This field is mostly used for **Ghost Cards**.

- This field populates when **Monthly** is selected in the **Card Balance Type** field.

Duration in Weeks – This field is used to set a **Card expiration in weeks**. Key in the number of weeks until the Card amount will reset. This field is mostly used for **Ghost Cards**.

- This field populates when **Weekly** is selected in the **Card Balance Type** field.

Duration in Days – This field is used to set a **Card expiration in days**. Key in the number of days until the Card amount will reset. This field is mostly used for **Ghost Cards**.

- This field populates when **Daily** is selected in the **Card Balance Type** field.

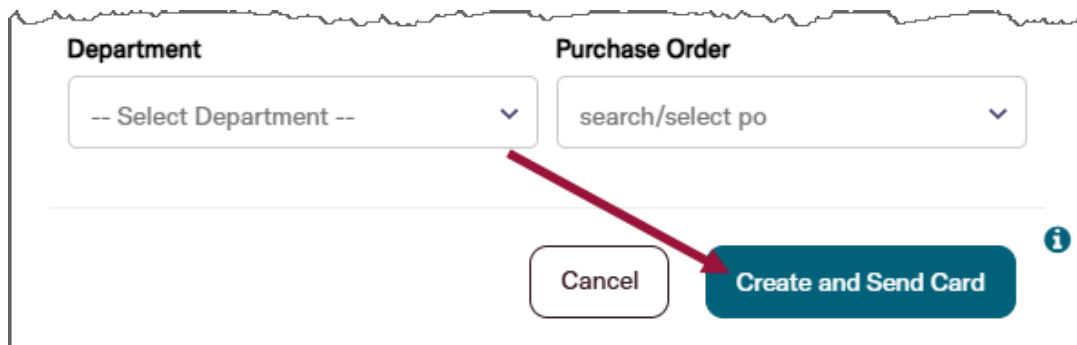
End Date – This field is used to indicate the **last date a Card can be used**. Key in the last date the Card can be used.

- This field populates when **General Use/Declining Balance** is selected in the **Card Balance Type** field.

Link to Existing Vendor – Optional field. This field is used to link the Card to an existing Vendor.

Subsidiary – Optional Field. This field is dependent on how the Company has structured their set up. For example, a Company may use subsidiaries to differentiate reporting. Another Company may use subsidiaries to differentiate managers, so only certain managers can see certain things. This field is rarely used, especially by Card-only accounts.

5. Click the **Create and Send Card** button.



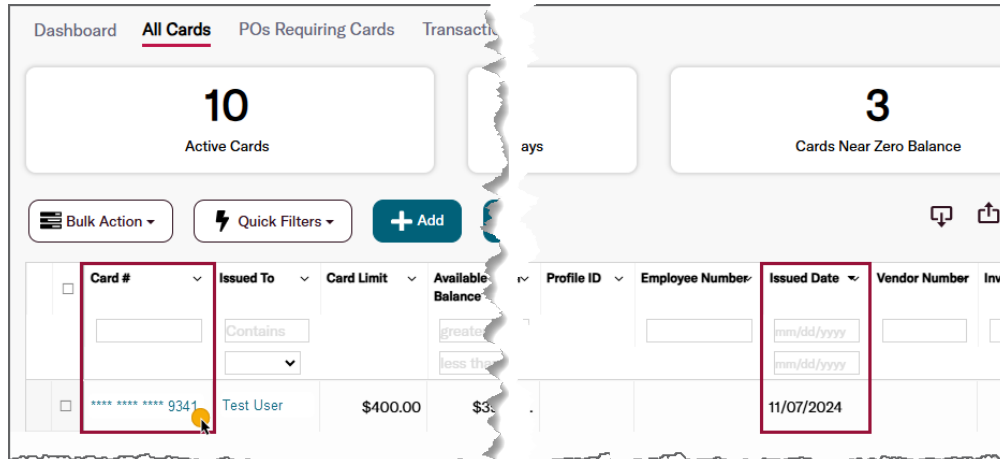
The screenshot shows a form with two dropdown menus at the top: 'Department' (with the text '-- Select Department --') and 'Purchase Order' (with the text 'search/select po'). Below these are two buttons: a white 'Cancel' button and a dark blue 'Create and Send Card' button. A red arrow points from the 'Department' dropdown to the 'Create and Send Card' button. An information icon (i) is located to the right of the 'Create and Send Card' button.

Check if the Card was Created

1. From the **Cards** Module > **All Cards** tab, use the drop-down arrow to sort the Card by **Issued Date**, sorting with the most recent Card on top.

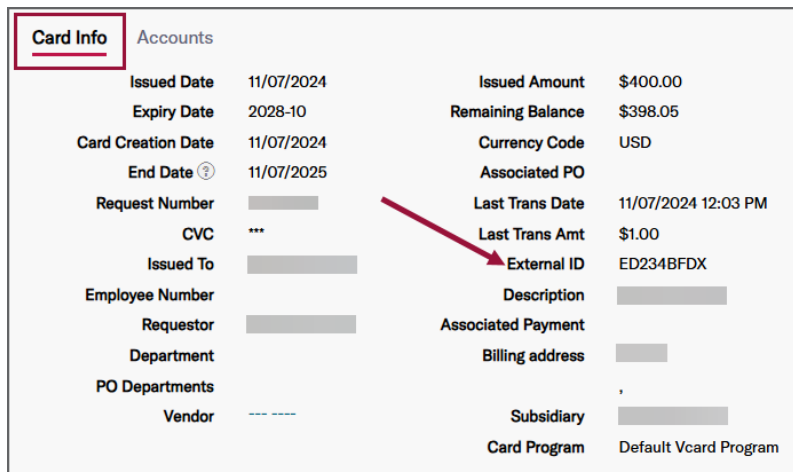
- You can also utilize the filter to search using the **cardholder's name**.

2. After finding the most recent Card, click on the **blue Card hyperlink**.



3. In the **Card Info** section, locate the **External ID** field.

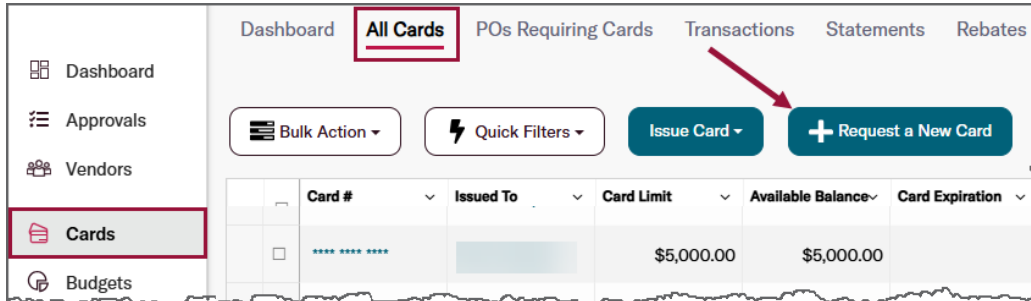
- If the **Card token number** appears in this field, the Card has been **created**.
- If this **field is blank**, the Card was **not created**.
- It may take a minute for the **Card token** to **populate** in this field.



Request a New Card

Cardholders may request that an Administrator order a Card on their behalf by following the steps outlined below.

1. From the **Cards** Module, click the **All Cards** tab. Then, click the **+Request a New Card** button.



2. Complete the following fields (field descriptions begin on the next page):

The screenshot shows the 'Request a Corporate Card' form. The form is titled 'Request a Corporate Card' and has a close button (X) in the top right corner. The form is divided into two tabs: 'Main' and 'Accounts'. The 'Main' tab is selected. The form contains the following fields:

- A** Issue Card to* (Dropdown menu with 'Paul Cardholder' selected)
- B** Link to Existing Vendor (Dropdown menu with 'Search for vendor by name' selected)
- C** Department (Dropdown menu with '-- Select Department --' selected)
- D** Budget (Dropdown menu with 'select/search the list' selected)
- E** Subsidiary: Honeycomb Mfg. (Text input field)
- F** Maximum amount permitted by your company without a purchase order: \$8,000.00
- G** Requested Amount* (Text input field with '\$' symbol)
- H** Card Balance Type* (Dropdown menu)
- H** Duration in Months* (Text input field with '1' entered)
- I** Description (Text input field)
- J** Attachments: (Icon for adding attachments)
- K** Submit (Button)

Required fields are denoted with a red asterisk. Field requirements may vary by Company.

Required fields are denoted with a red asterisk. Field requirements may vary by Company.

- A. **Issue Card to** – Key in the name of the person the Card will be issued to.
- B. **Link to Existing Vendor** – Optional Field. If you would like the Card linked to an existing Vendor, key the Vendor’s name into this field.
- C. **Department** – Optional Field. If you would like the Card linked to a specific department, key the department name into this field.
- D. **Budget** – This field is used to link the Card to a budget created in the **Budget** Module. This field may not display depending on Company configuration.
- E. **Subsidiary** – Optional Field. If you would like the Card linked to a subsidiary, key the subsidiary name into this field.
 - This field is dependent on how the Company has their Company structure set up. For example, a Company may use subsidiaries to differentiate reporting. Another Company may use subsidiaries to differentiate managers, so only certain managers can see certain things. This field is rarely used, especially by Card-only accounts.
- F. **Maximum Amount Permitted sentence** – This field is a callout. The limit on the Card must be set **lower** than the threshold listed in this field.
- G. **Requested Amount** – Key in the requested limit for the Card.
- H. **Card Balance Type** and **Duration In / End Date** – These fields work together. The selection in the **Card Balance Type** field determines the **Duration in ...** field.
 - **Monthly** – When the **Monthly** option is chosen, key in the number of months after which the **Requested Amount** will reset.

The screenshot shows a form with the following fields and values:

- Requested Amount***: \$ 5000.00
- Card Balance Type***: Monthly (selected in a dropdown menu, highlighted with a red box)
- Duration in Months***: 1 (indicated by a red arrow pointing from the Card Balance Type field)

Summary information at the bottom of the form:

- Amount renewed to card per interval: \$5,000.00
- Total aggregated amount over all intervals: \$5,000.00
- End date: 2025-06-14

- **Weekly** – When the **Weekly** option is chosen, key in the **number of weeks** after which the **Requested Amount** will reset.

The screenshot shows a form for configuring a card balance type. It includes a 'Requested Amount' field with a dollar sign and the value '5000.00'. To the right is a 'Card Balance Type' dropdown menu with 'Weekly' selected. Below these is a 'Duration in Weeks' field with the value '1', indicated by a red arrow. At the bottom, summary text reads: 'Amount renewed to card per interval: \$5,000.00', 'Total aggregated amount over all intervals: \$5,000.00', and 'End date: 2025-04-28'.

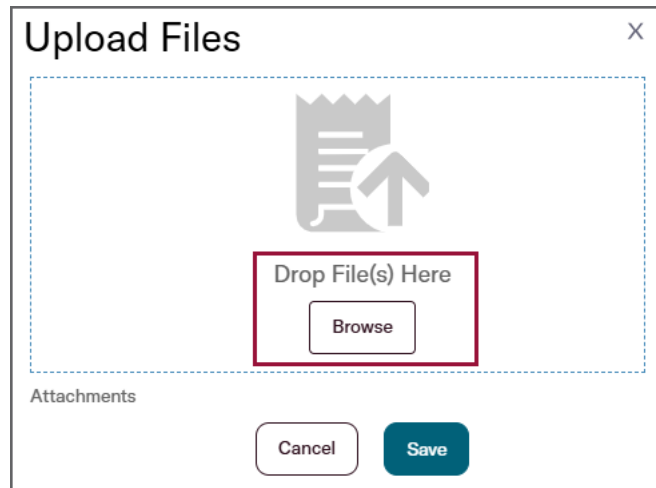
- **Daily** – When the **Daily** option is chosen, key in the **number of days** after which the **Requested Amount** will reset.

The screenshot shows a form for configuring a card balance type. It includes a 'Requested Amount' field with a dollar sign and the value '5000.00'. To the right is a 'Card Balance Type' dropdown menu with 'Daily' selected. Below these is a 'Duration in Days' field with the value '5', indicated by a red arrow. At the bottom, summary text reads: 'Amount renewed to card per interval: \$5,000.00', 'Total aggregated amount over all intervals: \$25,000.00', and 'End date: 2025-04-20'.

- **General Use / Declining Balance** – When the **General Use / Declining Balance** option is chosen, key in the **last day** in which the balance on the Card can be used.
 - The **balance will NOT automatically reset** on a **General Use / Declining Balance** Card. Once the balance of the Card is depleted, the Card must be manually reset.
 - For more information on resetting a Card limit, click [here](#).
 - Once a Card **reaches its End Date**, it **cannot be reset**. The Card will be deactivated and must be reordered.

The screenshot shows a form for configuring a card balance type. It includes a 'Requested Amount' field with a dollar sign and the value '5000.00'. To the right is a 'Card Balance Type' dropdown menu with 'General Use/Declining Balance' selected. Below these is an 'End Date' field with a calendar icon and the placeholder 'mm/dd/yyyy', indicated by a red arrow.

- I. **Description** – Optional field. If you would like a description attached to the Card, key that description into this field.
- J. **Attachments** – If you have documentation for the Card, it can be added by clicking the **attachment** icon and then **dragging and dropping** the documentation or clicking the **Browse** button.
 - o Once the documentation is added, click **Save**.



- K. Click **Submit**.

3. A successful completion message will appear in the top right corner of the screen.



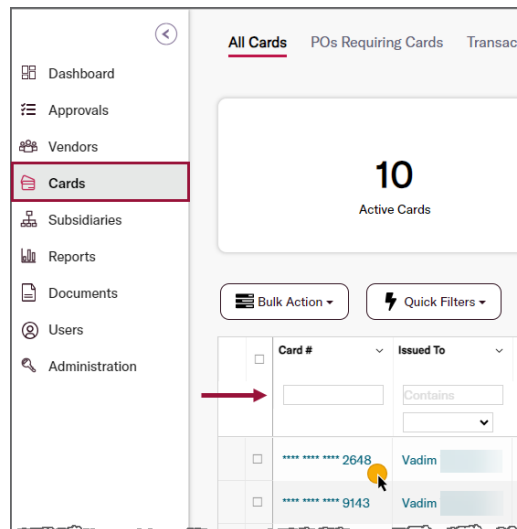
Perform One-Time Purchase

Corpay Complete Administrators can perform a **One-Time Purchase** in which the Card can **override profile parameters** for a **single transaction**.

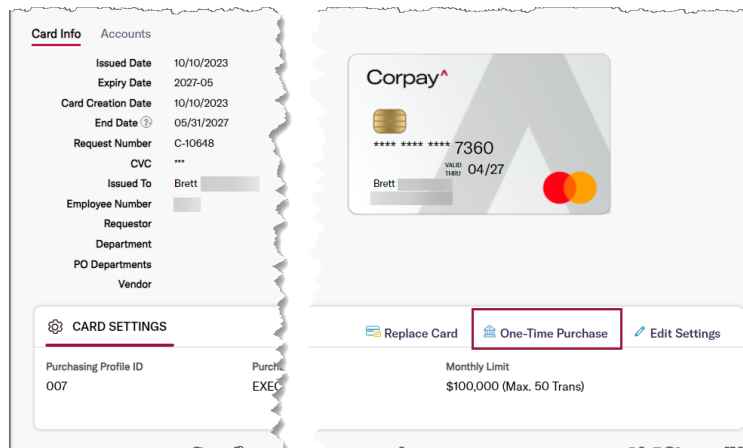
IMPORTANT

The **One-Time Purchase** amount must be the **NEXT swipe** on the Card.
Only use the One-Time Purchase for **same day transactions**.

1. From the **Cards** Module, use the filters to quickly locate the cardholder's name or Card number. Once located, **click the blue Card number link**. This will open the **Card Details** page.



2. On the **Card Details** page, in the **Card Info** tab, scroll down to the **Card Settings**. Click **One-Time Purchase**.



- This will open the **One-Time Purchase** window. Be sure to **read the notes from Corpay** that are included on this window. **Key in the amount** for the one-time purchase and click **Submit**.

One-Time Purchase

One-Time Purchase Amount:

\$

This is recommended for same day transactions.

Note: If the next transaction is authorized at a later date than current date, that current day's dollar usage may impact the ability to run a second transaction on that day with the reinstated limits.

All locations that accept the card will now be opened for the very next authorization. Additionally, you must enter the transaction dollar amount in the 'one-time purchase amount' field to complete your update.

After Corpay receives an authorization for the very next transaction, all daily and location limits will be reinstated.

Cancel Submit

Enable Temporary Spending Limit

Admins can **temporarily take a Card off** profile (enable a temporary spending limit). This is ideal if an associate is travelling and may expect to spend more money than allotted.

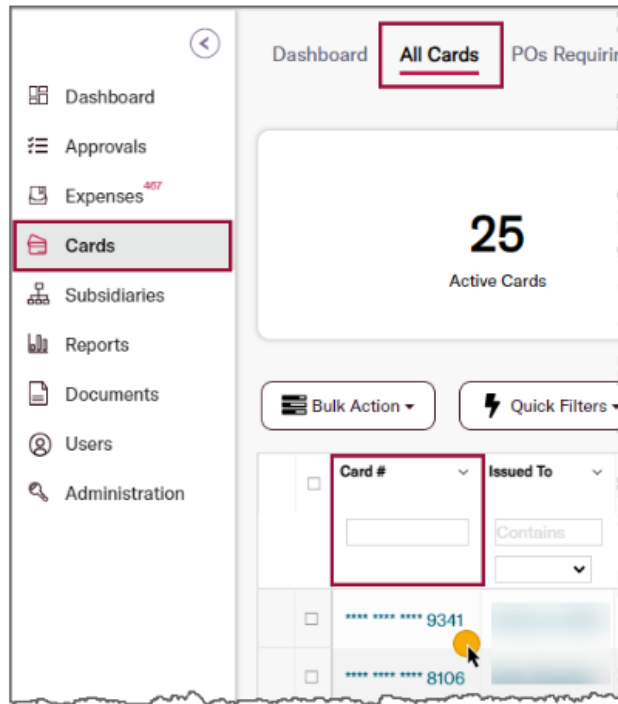
A **temporary spending limit** has a set end date but can be lifted early if needed. In Corpay Complete, when you **enable a temporary spending limit**, it also **overrides the number of transactions**

IMPORTANT

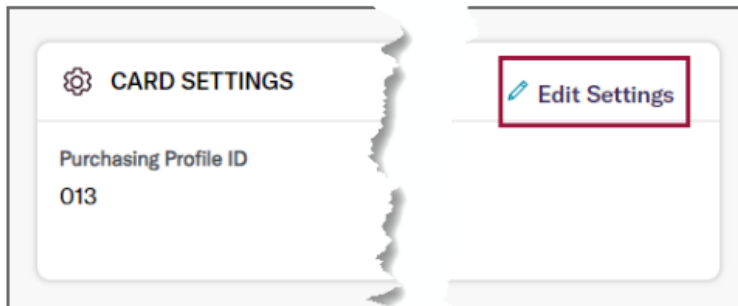
If you perform both a **One-Time Purchase** and **enable a Temporary Limit** at the same time, the **Card will decline**.

Please **choose one option** or the other, not both.

1. From the **Cards** Module, click **All Cards**. Use the **filters** to find the Card and click on the **blue Card number hyperlink**.



2. On the **Card Details** page, click **Edit Settings**.



3. On the **Manage Card** screen, scroll down to the **Enable Temporary Spending Limit** section and complete the following fields:

The screenshot shows the 'Manage Card' interface. At the top, there are tabs for 'Main' and 'Accounts'. Below that, it says 'Card Program: Cards'. The 'Card Profile*' is set to '013'. A table shows limits: Per Trans Limit (\$5,000), Daily Limit (\$5,000 (Max. 999 Trans)), and Monthly Limit (\$5,000 (Max. 999 Trans)). 'Issue Card To*' is 'Test User' and 'Employee Number*' is '12345678'. Section A has a checked box for 'Enable Temporary Spending Limit'. Section B shows 'Temporary Amount Limit*' as '\$8,000.00'. Section C shows 'Temporary Spending Limit Start Date*' as '11/08/2024'. Section D shows 'Temporary Spending Limit End Date*' as '11/12/2024'. The 'Status' is 'ACTIVE'. At the bottom right, there are 'Cancel' and 'Update Card' buttons, with an information icon next to 'Update Card'.

Per Trans Limit	Daily Limit	Monthly Limit
\$5,000	\$5,000 (Max. 999 Trans)	\$5,000 (Max. 999 Trans)

- A. **Enable Temporary Spending Limit** – Check this box.
- After checking this box, the rest of the fields in this section (letters B-D) will automatically populate.

- B. **Temporary Amount Limit** – Key in the amount of the temporary spending limit.
- If you are enabling a temporary spending limit **due to a transaction count error**, it is recommended to **key in a temporary amount limit equal to the transaction limit** on the Card.

The screenshot displays a card management form with the following fields and values:

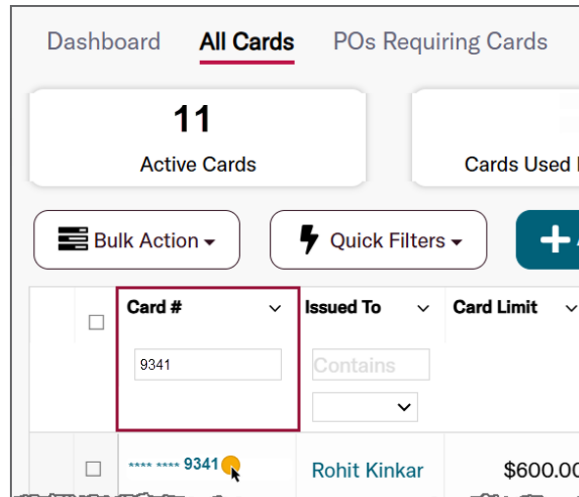
- Card Profile***: 013
- Per Trans Limit**: \$5,000 (highlighted with a red box and arrow)
- Daily Limit**: \$5,000 (Max. 999 Trans)
- Monthly Limit**: \$5,000 (Max. 999 Trans)
- Issue Card To***: Test User
- Employee Number***: 12345678
- Enable Temporary Spending Limit**
- Temporary Amount Limit***: \$5,000.000 (highlighted with a red box and arrow)
- Temporary Spending Limit Start Date***: 11/08/2024
- Temporary Spending Limit End Date***: 11/12/2024

- C. **Temporary Spending Limit Start Date** – Key in the start date (MM/DD/YYYY) of the temporary spending limit.
- D. **Temporary Spending Limit End Date** – Key in the end date (MM/DD/YYYY) of the temporary spending limit.
- E. Click **Update Card**.

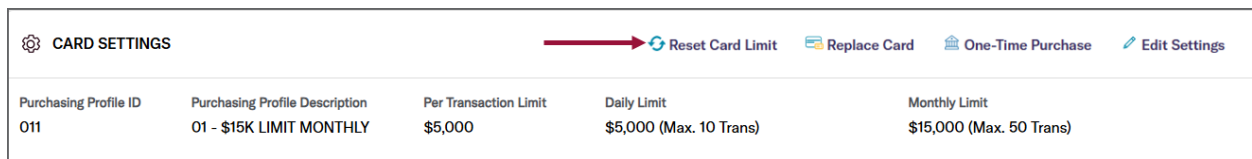
Reset a Card Limit

1. Navigate to the **Cards** Module and click the **All Cards** tab.

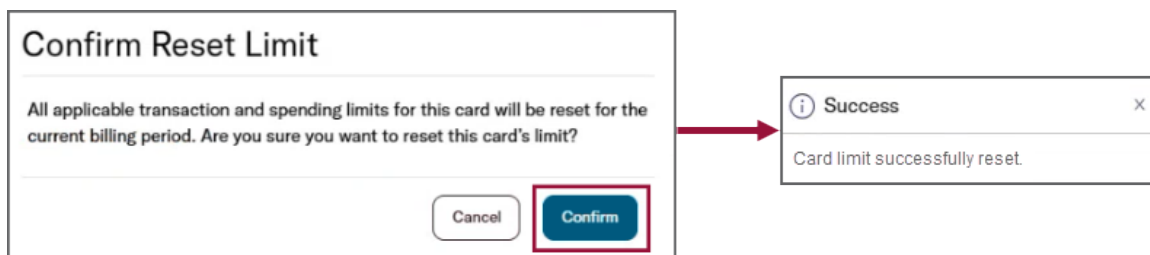
2. Ask the cardholder for the **last 4 digits of the Card number**. Search for the Card number by keying in the last 4 digits of the Card into the **Card #** field. Click the **blue hyperlink** of the Card number.



3. Scroll down to the **Card Settings** section and click the **Reset Card Limit** button.
 - If this button does not exist, the Company is not set up with the functionality.



4. After clicking the **Reset Card Limit** button, Admins will be shown the below window. Click **Confirm** to reset the Card's limits.



View the Card's Expiration Date

1. To find the expiration date for the Card, complete the following:

The screenshot shows the 'All Cards' module interface. The navigation menu on the left includes 'Cards' (A). The main content area has tabs for 'Dashboard', 'All Cards' (B), 'POs Requiring Cards', 'Transactions', and 'Statements'. A large card displays '21 Active Cards'. Below this are buttons for 'Bulk Action', 'Quick Filters', '+ Add', and '+ Request a New Card'. A table lists card details with columns: 'Card #' (C), 'Issued To', 'Card Limit', 'Available Balance', and 'Card Expiration' (D). The table contains two rows of data.

Card #	Issued To	Card Limit	Available Balance	Card Expiration
**** * 9341		\$20,000.00	\$19,567.04	2028-03
**** * 8106		\$5,000.00	\$4,664.99	2028-03

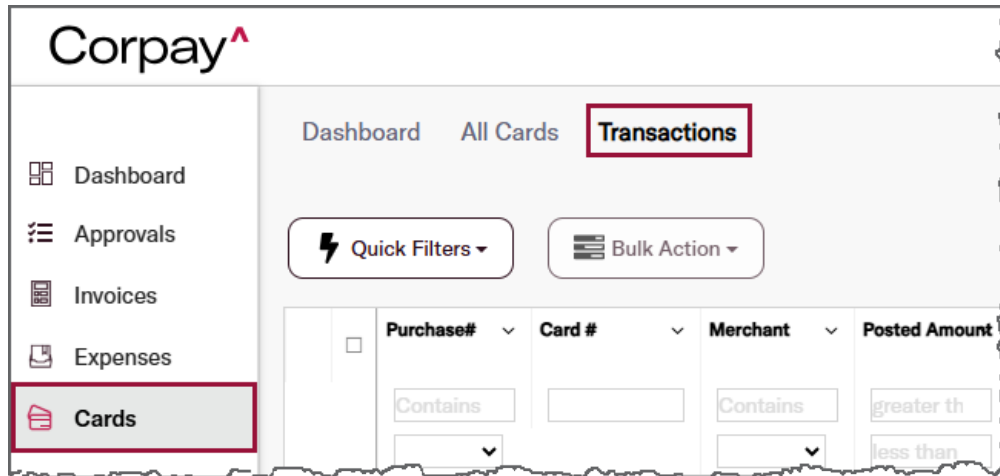
- A. Click on the **Cards** Module on the left side of the screen.
- B. Click the **All Cards** tab.
- C. Use the **Card #** column to locate the Card number.
- D. Use the **Card Expiration** column to locate the Card's expiration date.

IMPORTANT

If a Card transaction **is being declined for the expiration date being entered incorrectly**, have the cardholder attempt the transaction again, paying special attention to the **Card expiration date**.

Upload a Receipt to a Card Transaction

1. From the **Cards** module, click the **Transactions** tab.



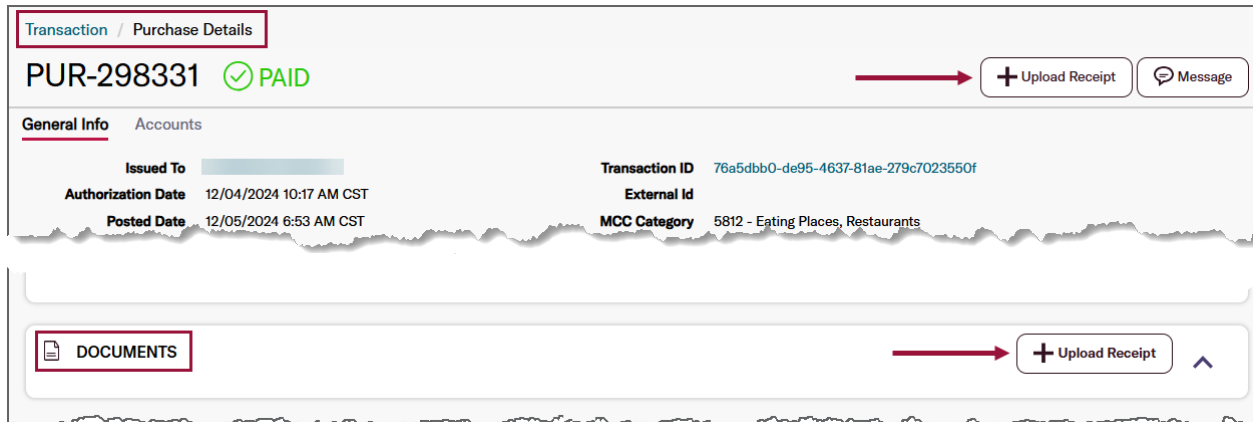
2. From the **Transactions Grid**, click on the **Purchase Number hyperlink** to which the receipt should be added.

<input type="checkbox"/>	Purchase#	Card #	Merchant	Posted Amount	Authorized Amount	Posted Date	Authorized Date
<input type="checkbox"/>	PUR-309281	**** * 96...	METROPOLI...	\$9.99	\$9.99	12/10/2024 ...	12/09/2024 ...
<input type="checkbox"/>	PUR-331059	**** * 96...	TARGET.COM	\$10.00	\$10.00	12/19/2024 ...	12/18/2024 ...

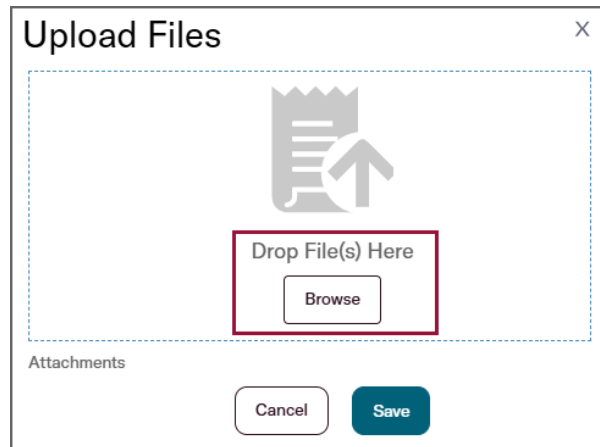
IMPORTANT

Transactions with a "PUR" link under the **Purchase #** column are transactions that have cleared

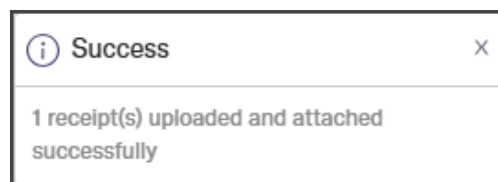
3. On the **Purchase Details** screen, the **+Upload Receipt** button is found in two places: at the top of the screen, and in the **Documents** section. Click either button to upload a receipt.



4. Add the receipt to the transaction by either **dragging and dropping** the receipt image or clicking the **Browse** button and searching for the receipt image on the user's computer. Once the receipt is added, click **Save**.



5. You will receive confirmation that the receipt upload was successful.



- The receipt image will appear in the **Documents** section of the **Purchase Details**.

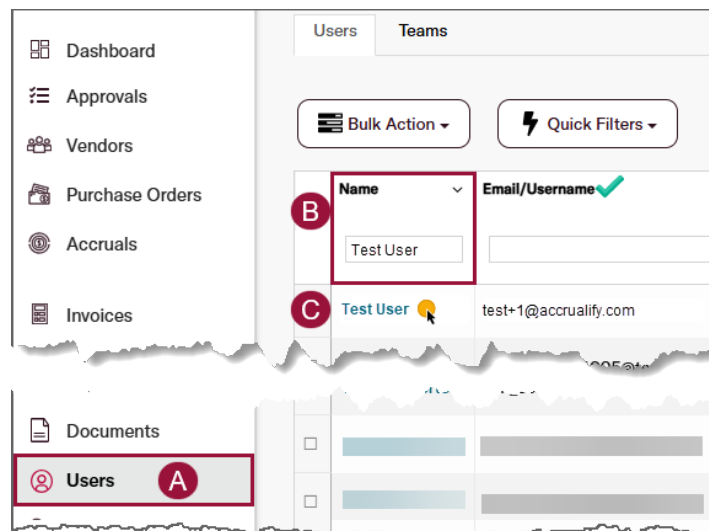


Alerts & Notifications

Risk Decline

If a cardholder has an **1100 Risk Decline**, Admins can complete the following steps:

- From the **Corpay Complete** platform, complete the following:



- Click on the **Users** module on the left side of the screen.
- Key the caller's name into the **Name** field.
- After locating the caller's name, click on the **blue name hyperlink**.

- From the **User Details > User Info** tab, navigate to the **Phone** field. The phone number in this field is used for texting Alerts and Notifications.

Users / User Details ←

Test User ✓ ACTIVE

User Info Addresses Payment Method

Company: Sample Inc
Name: Test User
Email: test+1@accrualify.com
Phone: 6153707000
Birthday: 12/30
Employee Manager: [Redacted]

- Verify the phone number in the **Phone** field with the cardholder.
 - If the **phone number is correct**, tell the cardholder, “Please **check for a text message** from **57911** to override and verify the transaction. Once the override is complete, you will get another text that will confirm the transaction can be run again.”
 - If **received a text** – Ask the cardholder to follow the directions on the text message and then try to run the transaction again.
 - If **did NOT receive a text** – Ask the cardholder to **text IN** to **57911** to enroll in Alerts and Notifications. Then, ask the cardholder to run the transaction again and follow the directions on any received text messages from 57911.
 - If the **phone number is NOT correct or missing**, click [here](#) to add or update the cardholder’s phone number in Corpay Complete.

IMPORTANT

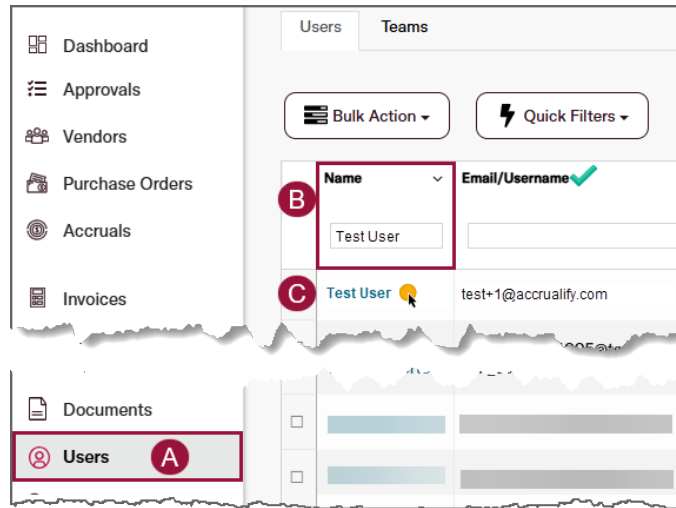
Canadian Cardholders should text **IN to 14445** from the mobile phone associated with their corporate Card.

Notes:

- If enrolled in Alerts and Notifications, a text message is automatically sent to the cardholder when the decline happens.
- If the transaction has declined multiple times, the cardholder must reply to **every text** using the confirmation word (CNF or ORD depending on the text type) and the transaction code.
- For more information on **Corpay’s Alerts and Notifications program**, click [here](#) to access the manual in the Corpay Complete Knowledge Base.

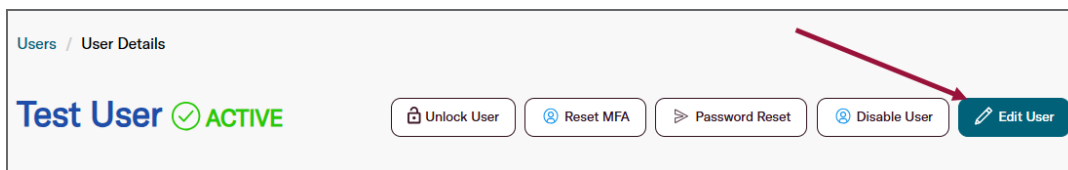
Add/Update a Phone Number for Alerts and Notifications

1. From the **Corpay Complete** platform, complete the following:

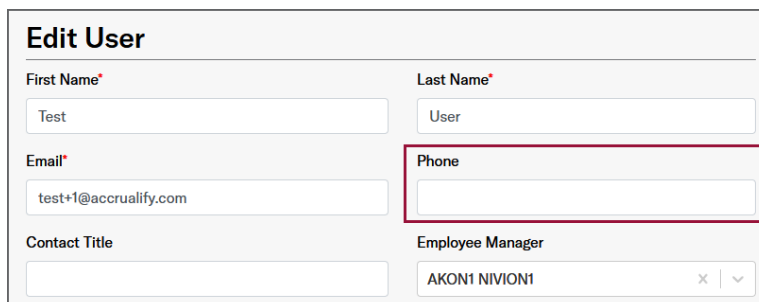


- A. Click on the **Users** module on the left side of the screen.
- B. Key the caller's name into the **Name** field.
- C. After locating the caller's name, click on the **blue name hyperlink**.
 - o If you need to **distinguish between names**, use the **Email/Username** field to find the correct person.

2. On the **User Details** page, click **Edit User**.



3. On the **Edit User** page, key in the user's phone number in the **Phone** field. Click **Submit**.

A screenshot of the 'Edit User' form. It has two columns of fields. The first column contains: 'First Name*' (Test), 'Email*' (test+1@accrualify.com), and 'Contact Title'. The second column contains: 'Last Name*' (User), 'Phone' (highlighted with a red box), and 'Employee Manager' (AKON1 NIVION1). There are 'x' and 'v' icons next to the Employee Manager field.

4. **The cardholder now needs** to complete the opt-in process:

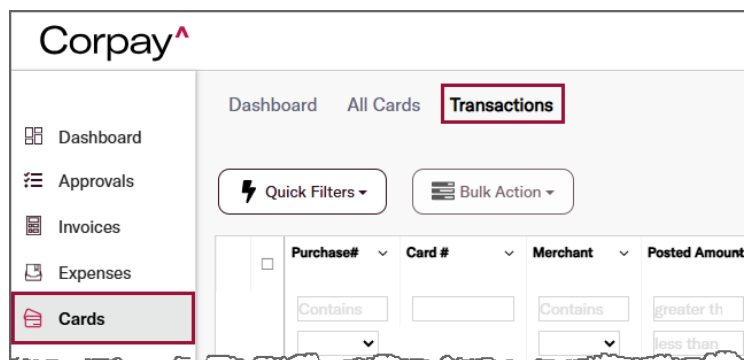
- Text "IN" to 57911
- After they receive confirmation of enrollment, they can try to run the transaction again.
- They will then get a text to override the transaction.

*For detailed instructions on **Alerts and Notifications for cardholders**, click [here](#).

Dispute a Transaction

Only Admins can dispute transactions; Cardholders cannot dispute transactions in Corpay Complete.

1. From the **Cards** module, click the **Transactions** tab.



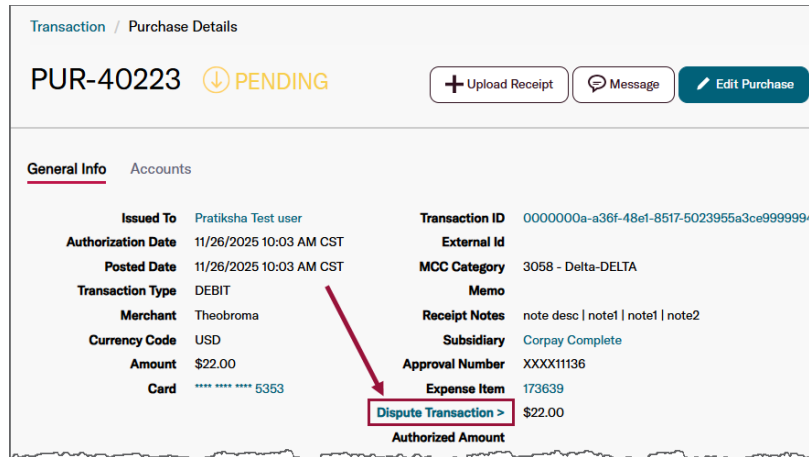
2. Locate the transaction that needs to be disputed. Click on the blue hyperlink in the **Purchase #** column.

- A transaction must have a **Cleared** status to be **eligible for dispute**.
- If an attempt is made to dispute a transaction with a **Pending status**, an error will be received by the Admin user.

The screenshot shows a detailed view of the Transactions table. The 'Purchase#' column contains blue hyperlinks. The 'Status' column shows 'CLEARED' for both transactions. The table has columns for Purchase#, Card #, Merchant, Posted Amount, Authorized Amount, Posted Date, Authorized Date, and Status.

	Purchase#	Card #	Merchant	Posted Amount	Authorized Amount	Posted Date	Authorized Date	Status
<input type="checkbox"/>	PUR-79193	**** * 12...	Verizon	\$844.87	\$844.87	06/27/2024	06/27/2024	CLEARED
<input type="checkbox"/>	PUR-45678	**** * 12...	Test Vendor	\$21.06	\$21.06	06/27/2024	06/27/2024	CLEARED

- From the **Purchase Details** page, click the **Dispute Transaction** button in the right column.



- On the **Card Transaction Dispute** window, select the **reason** for the dispute.

- The next few steps will follow along with a **Good or Services not as described** dispute as an example.
- The **selection on this screen determines the information** needed on the **NEXT screen**.

Card Transactions Dispute

Select Dispute Reason

Disputes are not automatically credited. Make sure to pay the full amount of all invoices.

- Duplicate
- Paid by another means (must require proof)
- Did not receive services or merchandise
- Amount of transactions differs from amount billed
- I did not authorize or participate in this/these transaction(s) (By selecting this reason, your card will be blocked, as this would indicate fraudulent activity)
- Goods or Services not as described (quality)
- Credit not processed and I have credit receipt, voucher (proof required)
- Other

Cancel Next

5. Complete all fields pertinent to the dispute and click **Next**.

- Required fields are denoted with a **red** asterisk.
- Please note the screen shot below is an **example** of a **Good or Services not as described** dispute form. **Dispute forms will vary based on the reason for dispute.**

< Card Transactions Dispute

Account Code: [REDACTED]

Transaction Details

Card Number [REDACTED] Customer ID [REDACTED]

Merchant Name	Transaction Date	Posted Date	Purchase No.	Posted Amount	Approval Code	MCC
[REDACTED]	8/30/2023	8/30/2023	PUR-[REDACTED]	500.00	TEST113	3058 - Delta-DELTA

Contact First and Last Name* [REDACTED] Company Name* [REDACTED]

Email* [REDACTED] Phone* [REDACTED]

Address* [REDACTED]

City* [REDACTED] State/Province* [REDACTED] Zip/Postal code* [REDACTED] Country -- Select Country --

Cancel Next

6. Click **Next**.

8. Once the dispute is submitted, the system will auto-assign a **Dispute ID** number.

Transaction / Purchase Details

PUR-263338 ⬇️ DISPUTED

[+ Upload Receipt](#) [Message](#) [Edit Purchase](#)

General Info Accounts

Issued To	[REDACTED]	Transaction ID	[REDACTED]
Authorization Date	11/16/2024 9:31 AM CST	External Id	
Posted Date	11/17/2024 11:36 AM CST	MCC Category	4816 - Information Services/Computer Network
Transaction Type	DEBIT	Memo	
Merchant	[REDACTED]	Subsidiary	[REDACTED]
Currency Code	USD	Approval Number	603555
Amount	\$24.21	Expense Item	18834449
Card	**** * [REDACTED]		

ⓘ Dispute ID: 9928794FE ←

There has been a dispute submitted for this transaction. [Click to download a copy of the dispute.](#)

- If the dispute reason is fraud, the Card will be blocked due to suspected fraudulent activity. On the **Card Details** screen, the fraud reason will be displayed at the top of the screen.

All Cards / Card Details

**** * 8946 ⊗ INACTIVE [show number](#)

✔️ This card has been blocked due to potential fraudulent activity. Please contact your administrator for more information.

✔️ Block Reason: Fraud override mode (Hobble home enabled)

Once disputed, the **Purchase Status** of the transaction should display **Disputed** on the **Transaction grid** while the **Status** of the transaction remains **Cleared**.

Purchase#	Merchant	Posted Amount	Authorized Amount	Posted Date	Authorized Date	Status	Transaction ID	Purchase Status	Action
		\$70.20	\$70.20	08/13/2025 4:...	08/13/2025 4:...	CLEARED	5123170a-a36f...	DISPUTED	
PUR-15309		\$464.54	\$464.54	03/17/2025 9:2...	03/17/2025 9:2...	CLEARED	a42b300e-2e...	PAID	
PUR-15310		\$244.94	\$244.94	03/17/2025 9:2...	03/17/2025 9:2...	CLEARED	d1f1b65c-6e4...	DISPUTED	
PUR-15311		\$209.20	\$209.20	03/17/2025 9:2...	03/17/2025 9:2...	CLEARED	e0cc860c-160...	PENDING	
PUR-15312		\$281.09	\$281.09	03/17/2025 9:2...	03/17/2025 9:2...	CLEARED	ad1af5ee-623...	PAID	
		total :	total :						

Follow Up on a Dispute

Use the following information to follow up on a dispute:

- Check if a **credit** in the amount of the dispute was **added** to the **Consolidated Invoice**.
 - Funds from a dispute are put back at the **Account** level, not the Card level.
 - Click [here](#) for how to access and read a **Consolidated Invoice**.
- If the **credit is not on the Consolidated Invoice**:
 - **Fraud Dispute** – Contact the **Corpay Fraud** team at frauddispute@comdata.com and ask for an update.
 - **Non-Fraud Dispute** – Contact the **Corpay Support** team at support@comdata.com and ask for an update.

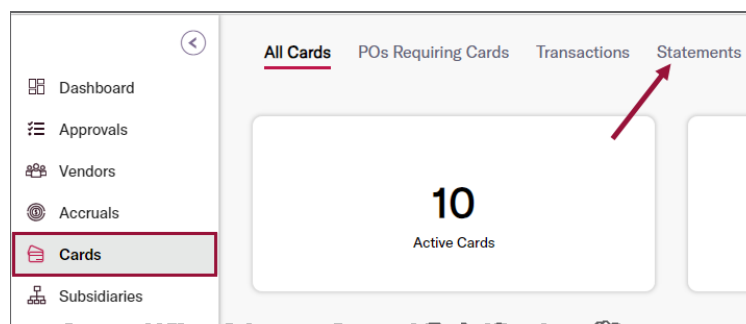
Access and Read Consolidated Invoices

Admins can read and review **consolidated invoices** on the Corpay Complete platform. A consolidated invoice will **combine all transactions for the particular Card program** into one condensed format for easy review.

The Consolidated Invoice is the **actual bill a Company receives each billing cycle**. The first page lists all the **charges by Cust ID** in addition to showing **the total for miscellaneous charges**.

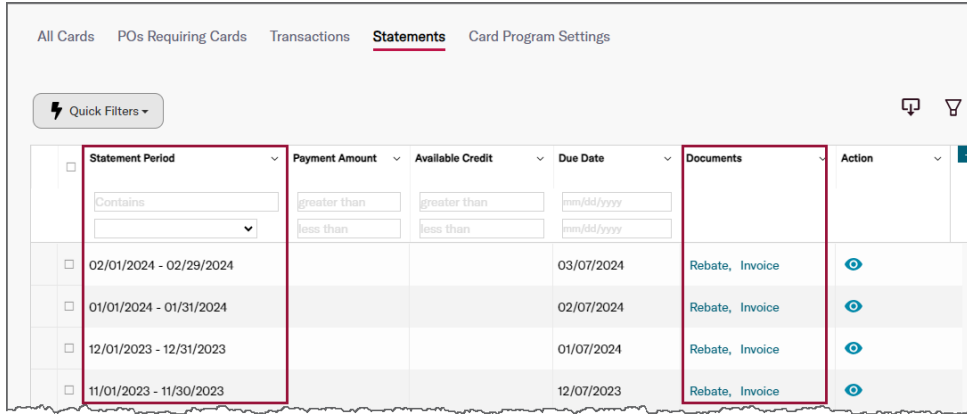
The pages that follow will **show transaction details** for each Cust ID, and the last page will show detail for the miscellaneous fees.

1. From the **Cards module**, click **Statements**.

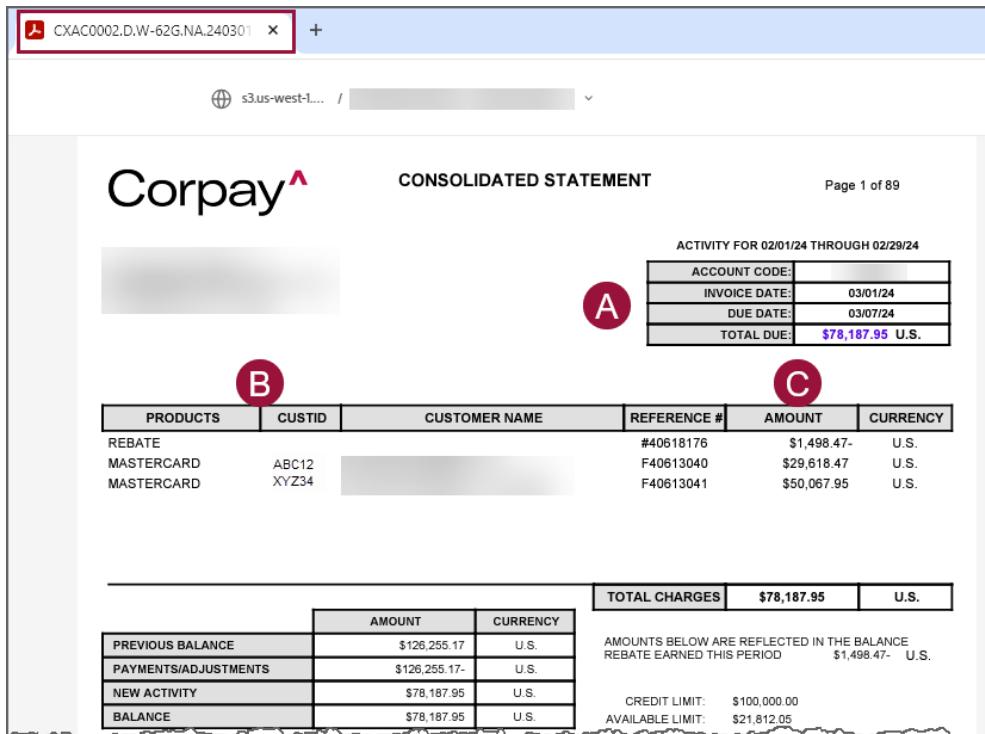


2. The **Statements** page will show **all previous consolidated invoices**, which are run on a monthly interval. Navigate the **Documents** column. In this column, users will see **Rebate, Invoice**.

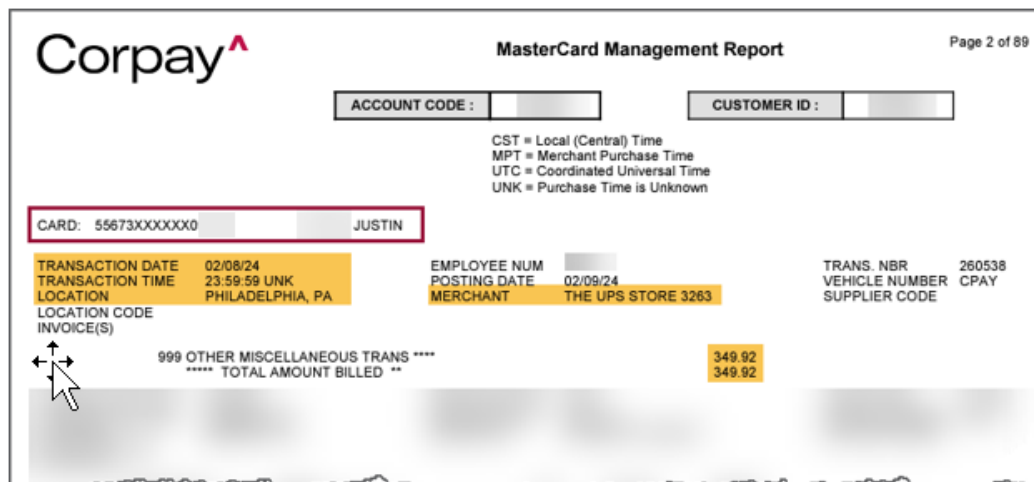
- Click the word **Rebate** to download the **Rebates letter** to see the rebates earned in that statement period.
- Click the word **Invoice** to see the entire **Consolidated Invoice** for all transactions in that statement period.
- This following example shows how to open and review an **Invoice**.



3. The Invoice will open in a new browser tab. There are a **few key points** to note on the **first page**. (See *field descriptions on next page*).



- A. **Statement Summary** – In the top right, you will see a summary of the total spend during the statement period, the date the invoice was created, and the date by which the invoice is due.
 - B. **Products and Cust ID** – The **Products & Cust ID** Columns show the Cards that are set up on the account. In this example, there are two Cards – Physical and Ghost.
 - C. **Amount** – The **Amount** column shows how much was spent on each Card during the statement period.
4. The **remaining pages** will show entries of **all the transactions for that statement period**. The transactions will be **organized by Cust ID**.
- At the top of the entry, you will see the **Card Number** and **cardholder's** last then first name.
 - Each entry will contain the **Transaction Date, Time, and Location**, as well as the **Merchant** and **Transaction Amount**.

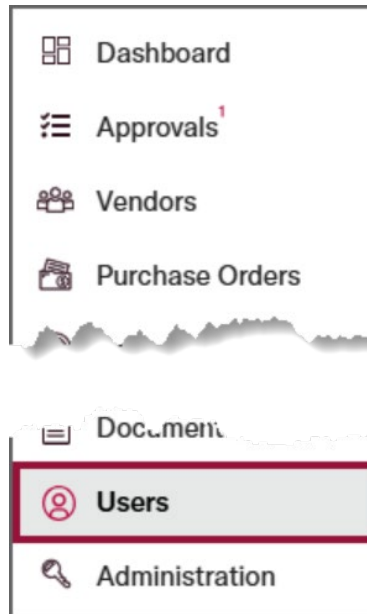


- Continue to scroll through the remaining pages to **review all the transactions for that statement period**.
- Use **Ctrl+F** on your keyboard, or the **Find** feature to **quickly locate a cardholder's Name or the Card Number**.

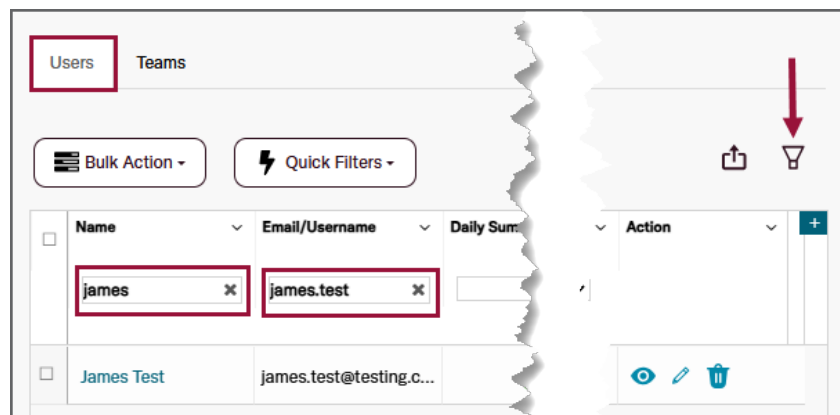
Add the Last 4 SSN and Birthday Data to a User

Use this section to **add or update the DOB or SSN** for a cardholder.

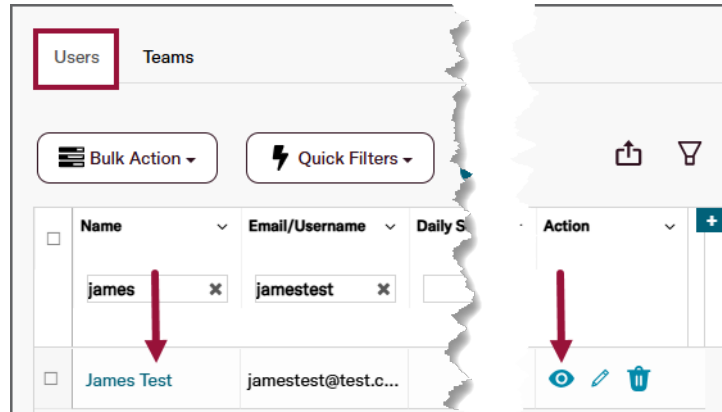
1. Click the **Users** module in the left-side navigation tab.



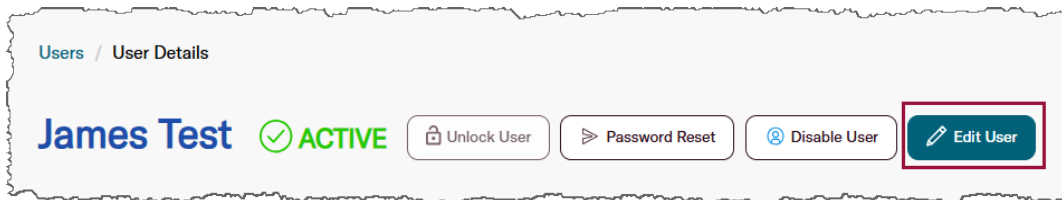
2. On the **Users** tab, key in the cardholder's name or email address into the filter field of the **Name** or **Email/Username** column.
 - Click the **Toggle Filter** icon to display the filter fields if they are not visible.



3. Click the **Name** hyperlink or the **View** icon to open the **User Details** page.



4. On the **User Details** screen, click the **Edit User** button on the right side of the screen.



5. Complete the following fields. If these fields are not visible on your screen, please refer to the instructions provided [here](#) to add them to your view.
 - A. **Last 4 SSN** –Key in the **last four digits** of the user’s **social security number** (SSN).
 - B. **Birthday** –Key in the user’s date of birth in **MM/DD** format (the year is not required).

Edit User

First Name* Name*

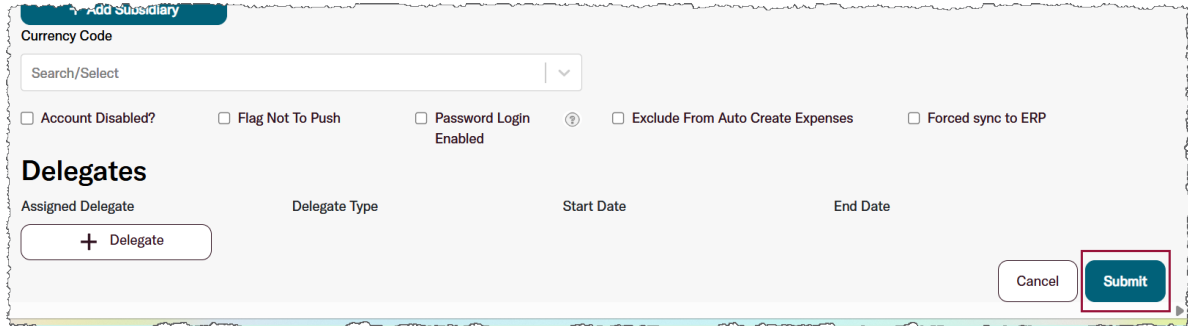
Contact ID

A Last 4 SSN

Birthday **B**

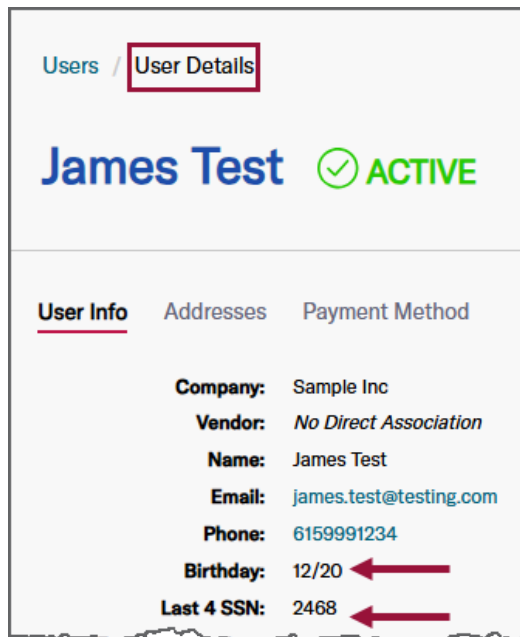
External ID

6. Scroll down to the bottom of the page and click **Submit**.



The screenshot shows a configuration form for a user. At the top, there is a 'Currency Code' dropdown menu with a search/select field. Below this are several checkboxes: 'Account Disabled?', 'Flag Not To Push', 'Password Login Enabled', 'Exclude From Auto Create Expenses', and 'Forced sync to ERP'. A section titled 'Delegates' contains a table with columns for 'Assigned Delegate', 'Delegate Type', 'Start Date', and 'End Date'. A '+ Delegate' button is located in the 'Assigned Delegate' column. At the bottom right of the form, there are two buttons: 'Cancel' and 'Submit'. The 'Submit' button is highlighted with a red box.

7. The **Birthday** and **Last 4 SSN** fields have now been saved.



The screenshot shows the 'User Details' page for a user named James Test. The user's status is 'ACTIVE'. The page is divided into three tabs: 'User Info', 'Addresses', and 'Payment Method'. The 'User Info' tab is selected. The user's information is displayed as follows:

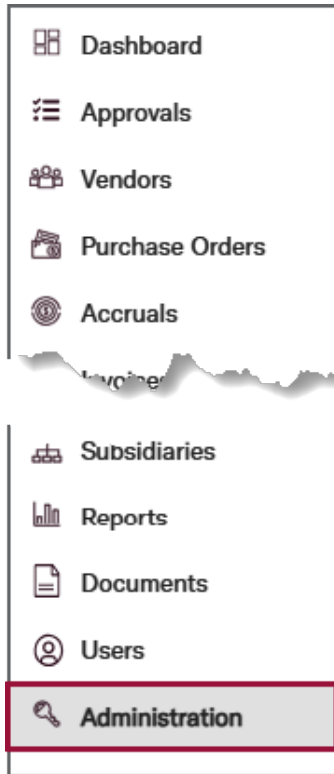
Company:	Sample Inc
Vendor:	No Direct Association
Name:	James Test
Email:	james.test@testing.com
Phone:	6159991234
Birthday:	12/20
Last 4 SSN:	2468

Red arrows point to the 'Birthday' and 'Last 4 SSN' fields, indicating they have been saved.

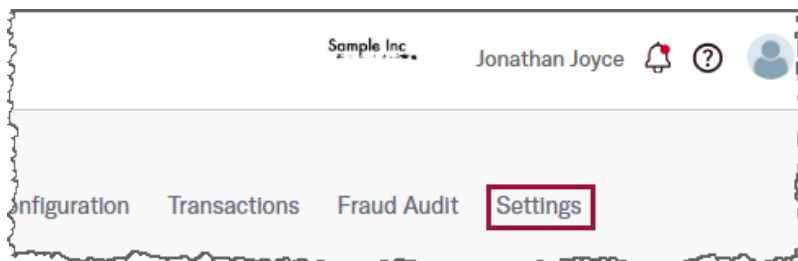
Add the Birthday and Last 4 SSN FIELDS

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

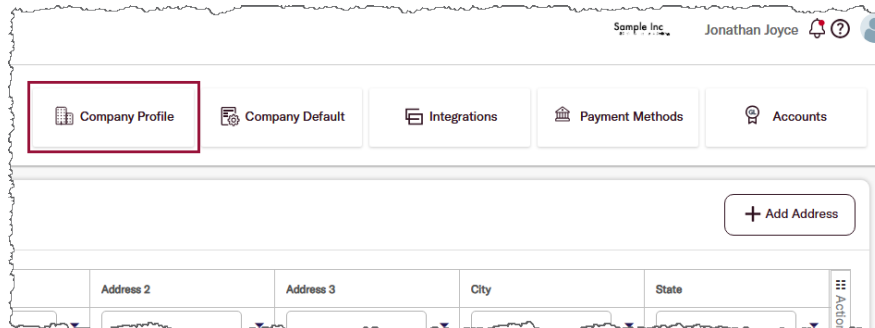
1. Click the **Administration** module in the left-side navigation pane.



2. Click the **Settings** tab.



3. Click the **Company Profile** tab.



4. **Update** or **add** information to the following fields (Please note, some fields may already be prepopulated).

A screenshot of the 'Settings' page, specifically the 'Company Profile' section. The page title is 'Settings' and the sub-section is 'Company Profile'. Below the title is a circular profile picture placeholder for 'Sample Inc.' with a camera icon. The form contains several fields: 'Company Name' (prepopulated with 'Sample Inc'), 'Email' (prepopulated with 'sampleinc@corpay.com'), 'Address 1' (prepopulated with '5301 Maryland Way'), 'Address 2' (empty), 'City' (prepopulated with 'Brentwood'), 'State' (prepopulated with 'Tennessee'), 'Zip Code' (prepopulated with '37027'), 'Phone' (prepopulated with '615-370-7000'), 'Company Website' (prepopulated with 'https://Sample Inc-QA.com11'), and 'EIN/Tax ID/VAT ID' (prepopulated with '12345611'). There are 'Cancel' and 'Save' buttons at the bottom right. Red circles with letters A through G are placed over specific fields: A over Address 1, B over Address 2, C over City, D over State, E over Zip Code, F over Country, and G over the Save button.

- A. **Address 1** – Key in the Company's address.
- B. **Address 2** – Key in the Company's address if a second line is needed.
- C. **City** – Key in the city of the Company.
- D. **State** – Key in the state of the Company.

- E. **Zip Code** – Key in the zip code of the Company.
 - F. **Country** – You must select **United States** for both the **Birthdate** and **Last 4 SSN** fields to populate.
 - G. Click **Save**.
5. Once created/saved, these fields will now be available in the **User Details** fields. You will need to return [here](#) to add information to the **DOB** and **Last 4 SSN** fields.

Card Module Reports

This **Reporting** section applies specifically to the **Cards module**. For reporting options in other modules, refer to their respective guides.

Card Module Reports in Corpay Complete provide detailed information on Card lists and usage, aiding Admin users in managing Cards. Admins can produce either standard reports or customized reports.

Reports are **per User** instance. A report pulled by one user will NOT carry over to other users.

ID	Name	Creation Date ↓	Filters Used
168876	Payment Listing	04/09/2025	end date
168547	Payment Listing	04/08/2025	end date
168159	Payment Listing	04/07/2025	end date

- A. **Create New Report** – Click this button to create or run a new report. Click [here](#) to navigate to the **Create a New Report** section of this guide.
- B. **Existing Reports** – Click this button to view and download any previously run reports. Click [here](#) to navigate to the **Existing Reports** section of this guide.

- C. **Recurring Reports** – Click this button to see any recurring reports or to schedule a new recurring report. Click [here](#) to navigate to the **Recurring Reports** section of this guide.



Navigate the Existing Reports Grid

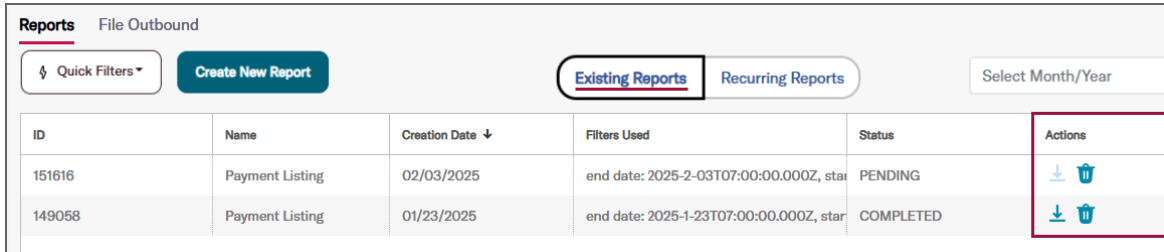
ID A	Name B	Creation Date C	Filters Used D	Status E	Actions F
149058	Payment Listing	01/23/2025	end date: 2025-1-23T07:00:00.000Z, star	COMPLETED	

- A. **ID** – The ID number of the report.
- B. **Name** – The name of the report.
- C. **Creation Date** – The date the report was created.
- D. **Filters Used** – The filters applied when generating the report. For example, start date, end date, and Vendor.
- E. **Status** – The status of the report:
 - **Pending / Running** – The report is in the process of **generating**.
 - **Completed** – The report is complete and **ready for download**.





ID	Name	Creation Date ↓	Filters Used	Status	Actions
151616	Payment Listing	02/03/2025	end date: 2025-2-03T07:00:00.000Z, star	PENDING	
149058	Payment Listing	01/23/2025	end date: 2025-1-23T07:00:00.000Z, star	COMPLETED	

F. **Actions** – Available actions for the report:

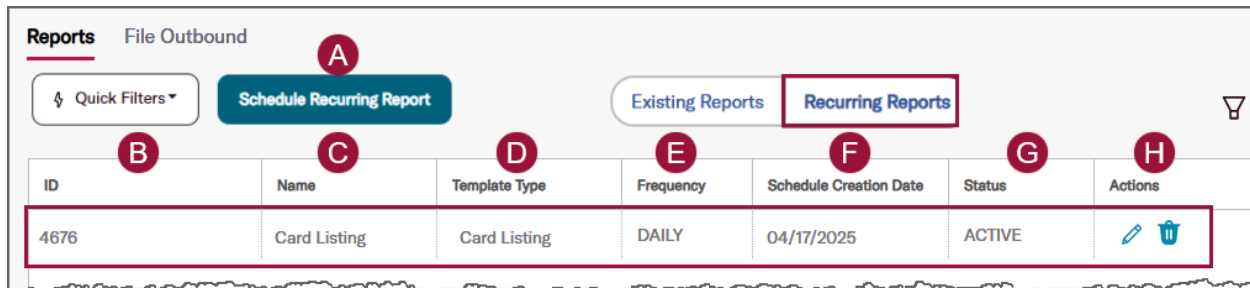
- **Download** – Click the **Download**  icon to download the report.
- **Delete** – Click the **Delete**  icon to delete the report.





The screenshot shows the 'Reports' section with a table of existing reports. The 'Actions' column for each report is highlighted with a red box, showing a download icon and a delete icon.

ID	Name	Creation Date ↓	Filters Used	Status	Actions
151616	Payment Listing	02/03/2025	end date: 2025-2-03T07:00:00.000Z, sta	PENDING	 
149058	Payment Listing	01/23/2025	end date: 2025-1-23T07:00:00.000Z, star	COMPLETED	 

Navigate the Recurring Reports Grid



The screenshot shows the 'Recurring Reports' section with a table of recurring reports. Annotations A through H are placed over various elements: A (Schedule Recurring Report button), B (ID), C (Name), D (Template Type), E (Frequency), F (Schedule Creation Date), G (Status), and H (Actions).



ID	Name	Template Type	Frequency	Schedule Creation Date	Status	Actions
4676	Card Listing	Card Listing	DAILY	04/17/2025	ACTIVE	 

- A. **Schedule Recurring Report** – Click this button to schedule a new, recurring report. Click [here](#) to schedule a recurring report.
- B. **ID** – The ID number of the report.
- C. **Name** – The name of the report.
- D. **Template Type** – The name of the report. (This column is always the same as column C.)
- E. **Frequency** – The frequency of the report: daily, weekly or monthly.
- F. **Schedule Creation Date** – The date the report is scheduled to generate.

G. **Status** – This field will read Active.

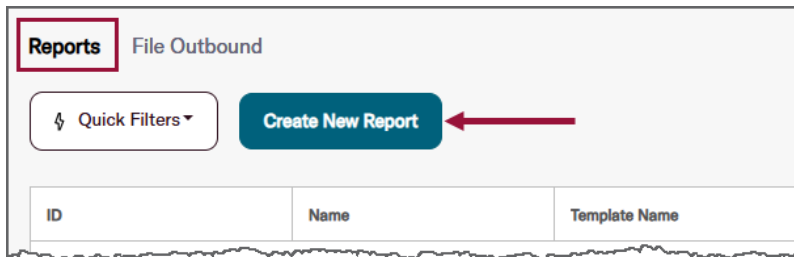
- Recurring reports cannot be inactivated, only deleted.

H. **Actions** – Available actions for the report:

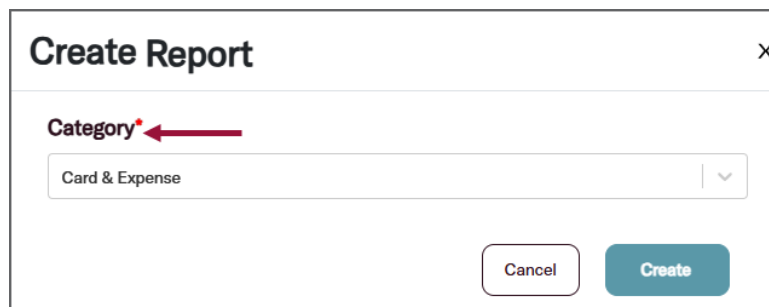
- **Edit** – Click the **Edit**  icon to edit the scheduled report.
- **Delete** – Click the **Delete**  icon to delete the scheduled report.

Create a New Report

1. From the **Reports module > Reports tab**, click **Create New Report**.



2. On the **Create Report** window, navigate to the **Category** field. Use the drop-down menu and select **Card & Expense**. The screen will automatically expand.



3. Complete the following fields (field descriptions begin on next page):

The screenshot shows a 'Create Report' form with the following fields and callouts:

- Category***: Card & Expense
- Report Type***: Select one (Callout A points to this field)
- Export Preferences**
 - Export Format***: csv
 - Export Destination***: download (Callout B points to this field)
 - Exclude Header Description (Callout C points to this checkbox)
- Buttons**: Cancel and Create (Callout D points to the Create button)

A. **Report Type** and **Export Format** – Select the report type and export format. To view report options available in the Cards module, including a description of each report and the export formats supported, click [here](#) to navigate to the **Cards Module Report Table**.

- **Note:** After selecting a specific report, the screen will automatically expand and **reveal additional fields** needed for the selected report, including a start and end date. Complete those fields as required or needed.

B. **Export Destination** – Select how the report will be delivered: download to Corpay Complete, emailed, or sent via Secure File Transfer Protocol (SFTP).

- The options available in this field may be limited based on the selected report.

The close-up shows the 'Export Destination*' dropdown menu with the following options:

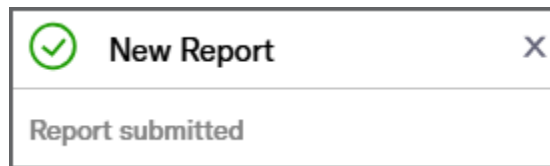
- download (highlighted in blue)
- email
- sftp

C. **Exclude Header Description** – Check this box to remove the column headers on the report download. It is NOT recommended to check this box.

D. Click **Create** to begin the report creation.

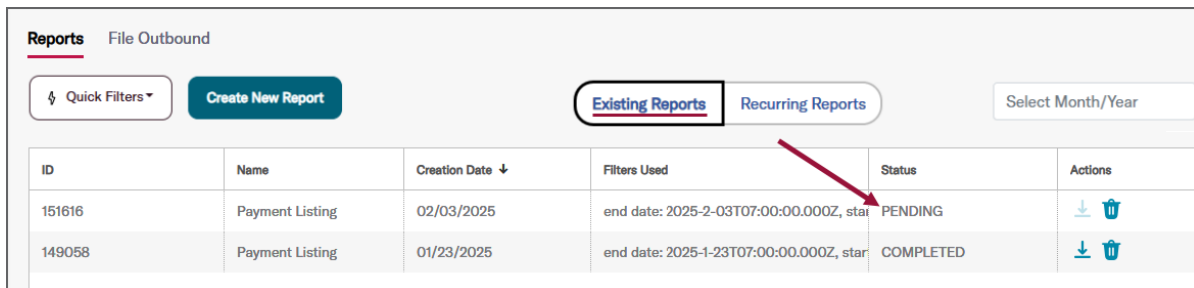
- Generating a report can take anywhere from one to ten minutes depending on the account and the amount of data in the filters.





4. The **New Report** window will appear on the screen, and the user will be direct back to the **Existing Report** screen.



5. The report will appear on the **Existing Reports** screen in **Pending** status until it is completed.

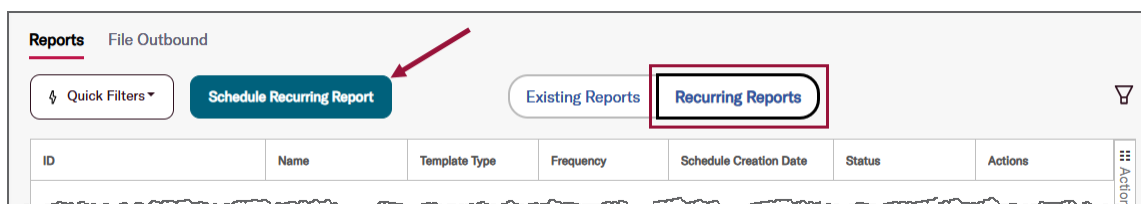
- Users may need to refresh their screen for the report to go into Completed status.

A screenshot of the "Existing Reports" screen. It shows a table with columns: ID, Name, Creation Date, Filters Used, Status, and Actions. There are two rows of data. The first row has ID 151616, Name "Payment Listing", Creation Date "02/03/2025", Filters Used "end date: 2025-2-03T07:00:00.000Z, star", Status "PENDING", and Actions (download and delete icons). The second row has ID 149058, Name "Payment Listing", Creation Date "01/23/2025", Filters Used "end date: 2025-1-23T07:00:00.000Z, star", Status "COMPLETED", and Actions (download and delete icons). A red arrow points from the "Existing Reports" tab to the "PENDING" status cell in the first row.

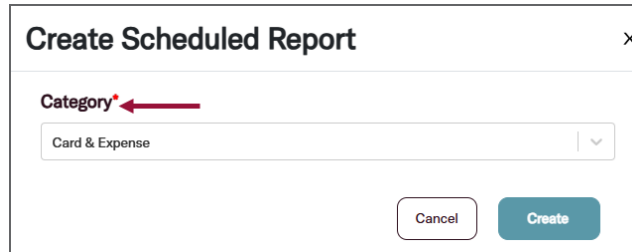
ID	Name	Creation Date ↓	Filters Used	Status	Actions
151616	Payment Listing	02/03/2025	end date: 2025-2-03T07:00:00.000Z, star	PENDING	 
149058	Payment Listing	01/23/2025	end date: 2025-1-23T07:00:00.000Z, star	COMPLETED	 

Schedule a Recurring Report

1. From the **Recurring Reports** tab, click **Schedule Recurring Report**.

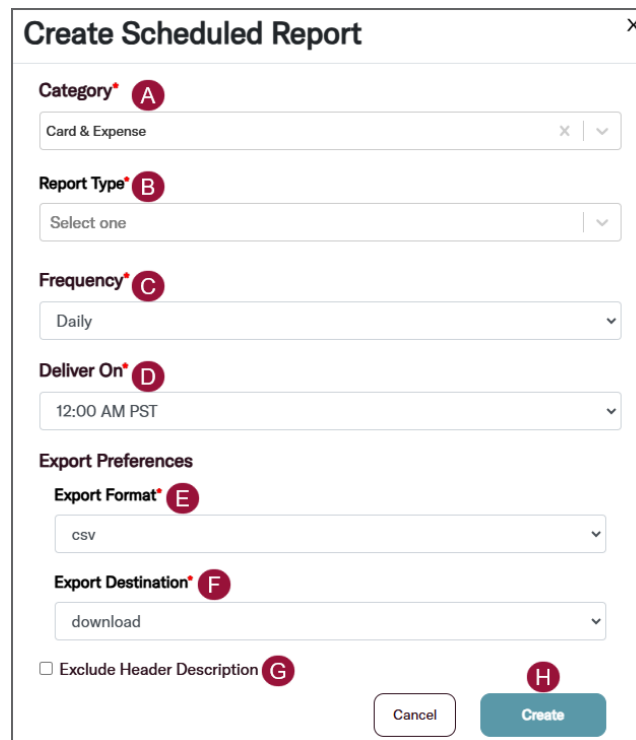


2. On the **Create Report** window, navigate to the **Category** field. Use the drop-down menu and select **Card and Expense**. The screen will automatically expand.



The screenshot shows a window titled "Create Scheduled Report" with a close button (X) in the top right corner. Below the title bar, there is a "Category*" field with a red arrow pointing to it. The field contains the text "Card & Expense" and a dropdown arrow. At the bottom of the window, there are two buttons: "Cancel" and "Create".

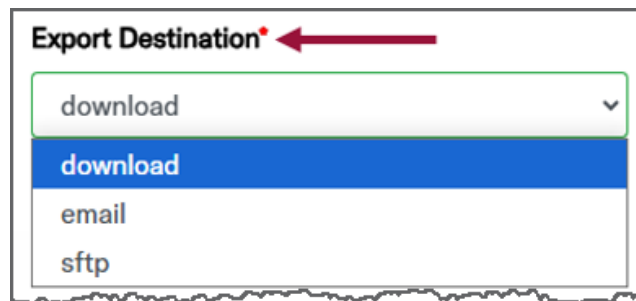
3. Complete the following fields:



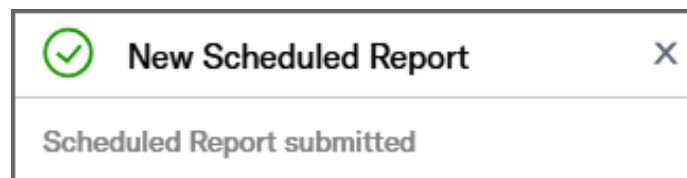
The screenshot shows the "Create Scheduled Report" window with several fields labeled with letters in red circles: A, B, C, D, E, F, G, and H. Field A is "Category*" (Card & Expense), B is "Report Type*" (Select one), C is "Frequency*" (Daily), D is "Deliver On*" (12:00 AM PST), E is "Export Format*" (csv), F is "Export Destination*" (download), G is "Exclude Header Description" (checkbox), and H is the "Create" button. The "Cancel" button is also visible at the bottom.

- A. **Category** – Select **Card & Expense**.
- B. **Report Type** – Select the Report Type. To view report options available in the Cards module, including a description of each report and the export formats supported, click [here](#) to navigate to the **Cards Module Report Table**.
 - o **Note:** After selecting a specific report, the screen will automatically expand and **reveal additional fields / filters** that need to be set up for the selected report. Complete those fields as required or as needed.

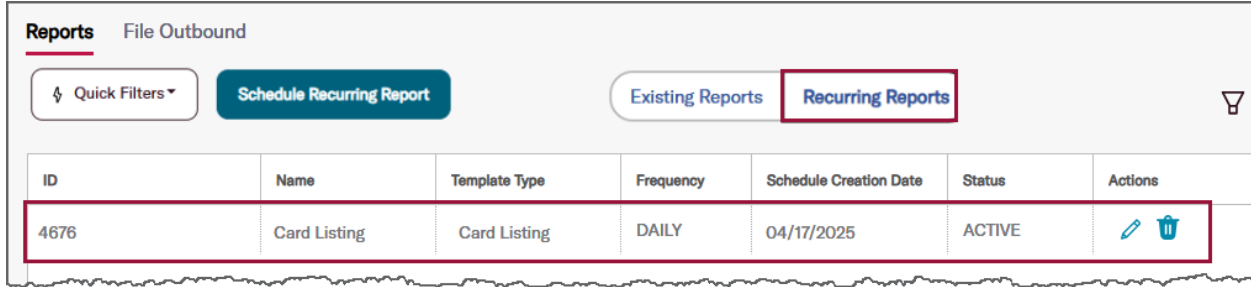
- C. **Frequency** – Select the frequency the report needs to run: daily, weekly or monthly.
- D. **Deliver on** – Select the time of day (daily), day of the week (weekly), or day of the month (monthly) for the report generation.
- E. **Export Format** – Select the **Export Format**: CSV or XLSX.
- The options available in this field may be **limited based on the selected report**. If the report only has one export format, this field will automatically populate.
 - Click [here](#) to access the **Cards Module Report Table** for help with export formatting.
- F. **Export Destination** – Select how the **report will be delivered**: downloaded to Corpay Complete, emailed, or sent via Secure File Transfer Protocol (SFTP).



- G. **Exclude Header Description** – Check this box to remove the column headers on the report download. It is NOT recommended to check this box.
- H. Click **Create** to begin the report creation.
- Generating a report can take anywhere from one to ten minutes depending on the account and the amount of data in the filters.
4. The **New Scheduled Report** window will appear on the screen, and the user will be directed back to the **Recurring Report** screen.



5. The scheduled report will appear on the **Recurring Reports** grid.



Cards Module Report Table

Reminder: The [Cards Module Grid](#) and the [Transactions Grid](#) also offer users a detailed view of their Card management and transactions.

The following table outlines the most common reports for the **Cards** module.

Report Type	Description	Export Format
Blocked and Expired Card	Detailed report showing all blocked and expired Cards within a specified date range. This report includes the Card program type, cardholder name, Card status, Card creation date, and Card token.	CSV, XLSX
Cardholder A&N Enrollment	Provides a status of activated Cards based on alerts and notification users.	XLSX
Cardholder Usage	View transaction details by cardholder, including merchant information, spend per transaction, description, and price of purchased product.	XLSX
Card Listing	View current record information for all Cards associated with the account, including the Card type, cardholder name, employee ID number, purchase profile, status, email, and the following dates: open date, expiration date, last usage date, and deactivation date.	CSV, XLSX
Card Spend and Interchange	View detailed transaction-level information for card spend and interchange, including the associated company and customer identifiers, company name, cleared transaction ID, virtual card ID, Comdata account code, card type and card program name, transaction description, gross payment amount, issuer, transaction creation date, and applicable interchange rate for each card transaction.	XLSX