

## Expense Track 18.2 Release Notes

Release 18.2 for Expense Track is available on 08/23/2018 and includes the following changes:

**Note:** For more information on the items listed, see the Expense Track Online Help.

- [Disable Manual Expense Entry for Comdata Mastercard Users](#)
- [Prevent Editing of Imported Comdata Mastercard Transactions](#)
- [Recycle Deleted Receipt Images](#)
- [Require Receipt Image Notes on Mobile App](#)
- [Separate Permission for Creating and Running Reports](#)
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- [Resolved Defects](#)

### Disable Manual Expense Entry for Comdata Mastercard Users

This item adds permission **2099 - Restrict User From Creating Expenses**. When this permission is enabled for a user, the following changes display within Expense Track:

- Removed **Create New Expense Draft** button on the Quick Access Carousel on the home page.
- Removed **Create Expense Draft** button on Expense Dashboard and Expense Drafts pages.
- Removed the drop-down to add an expense item when editing an expense report draft.
- Removed ability to copy expense items to a new expense report when viewing a submitted expense report.
- Removed ability to add expense report drafts on the Expense Track mobile app.

This change allows Administrators to restrict Comdata Mastercard users from creating draft expense reports, which could lead to confusion and errors. In addition, with this permission enabled, users cannot add expense items to draft expense reports, or copy items from one expense report to another.

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## Prevent Editing of Imported Comdata Mastercard Transactions

This item removes the ability for Comdata Mastercard users to edit the **Date** and **Vendor/Merchant** fields of imported credit card expense items. For all expense items marked with (✎), the following fields can no longer be edited:

- **Date**
- **Vendor/Merchant**

Comdata Mastercard users can continue to edit other fields, such as the accounts coding and charge-to locations. This change removes the risk of errors and misuse on imported credit card transactions

**Note:** This feature will not change the source data of the Mastercard transactions.

Add/Edit Expense Item

Save Clear Entries Cancel

Airfare

**Date\*** 05/03/2018

**Merchant\*** STATION

**Description/Purpose\***

**Payment Type\*** Comdata

**Quantity** 1.00

**Amount** 25.0000

**Personal Expense**  No  Yes

**Remember data for the next expense?**

Product Data +
Airline Data +

**Account Code**

**Accounts coding type** Equipment with GL
 

**Company** 1-Comdata Construction
 

**Equipment Number** 10.1250-D8 Dozer
 

**Cost Type** 10-Equipment Rental
 

**Account** 541005-Indirect Travel

**Attachments**

**Upload Attachment:** Click to add attachment.

Save Clear Entries Cancel

**Receipts**

Only show my receipts

Did you know you can e-mail pictures of your receipts to Expense Track from your phone?

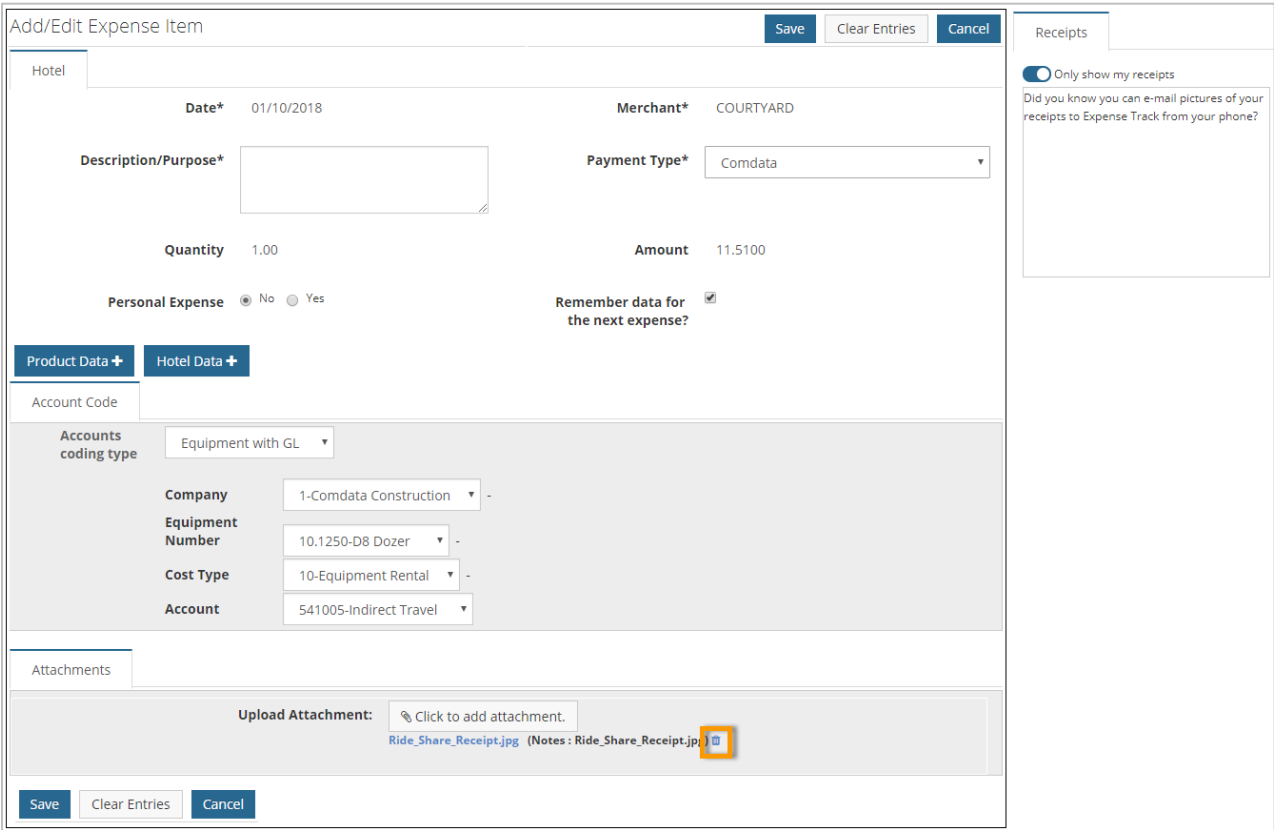
# Expense Track 18.2 Release Notes

## Recycle Deleted Receipt Images

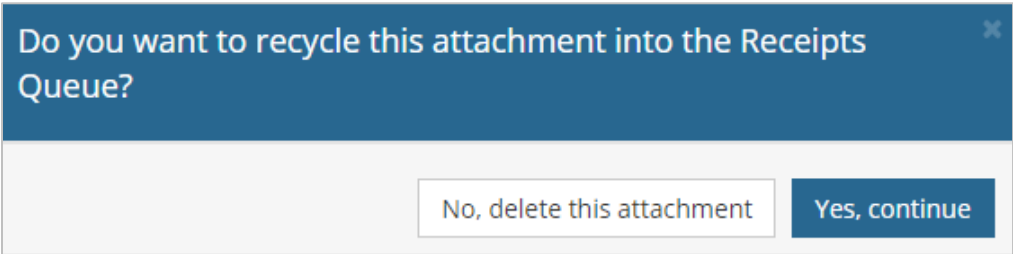
This item allows users to save attachments that they delete from expense items. When a user deletes an attachment, such as a receipt image, a new pop-up displays.

This window asks the user if they want to recycle the attachment, which will place it back in the Receipts queue, or delete it completely from the system. This functionality applies to all attachments of any file type and is present in the mobile app as well.

- 1. Click the **Delete** icon (🗑️) on an expense item with an attachment.



- 2. You are prompted to fully delete the attachment, or recycle it. Click **Yes, Continue** to recycle the attachment.



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- The attachment is now placed back in the Receipts queue.

Add/Edit Expense Item
Save Clear Entries Cancel

Hotel

Date\* 01/10/2018

Description/Purpose\*

Quantity 1.00

Personal Expense  No  Yes

Merchant\* COURTYARD

Payment Type\* Comdata

Amount 11.5100

Remember data for the next expense?

Product Data +
Hotel Data +

Account Code

Accounts coding type Equipment with GL

Company 1-Comdata Construction

Equipment Number 10.1250-D8 Dozer

Cost Type 10-Equipment Rental

Account 541005-Indirect Travel

Attachments

Upload Attachment:

Save
Clear Entries
Cancel

Receipts
Only show my receipts

Ride\_Share\_Receipt.jpg

Recycled Receipt sent on 07/13/2018 by Kristen Wiig

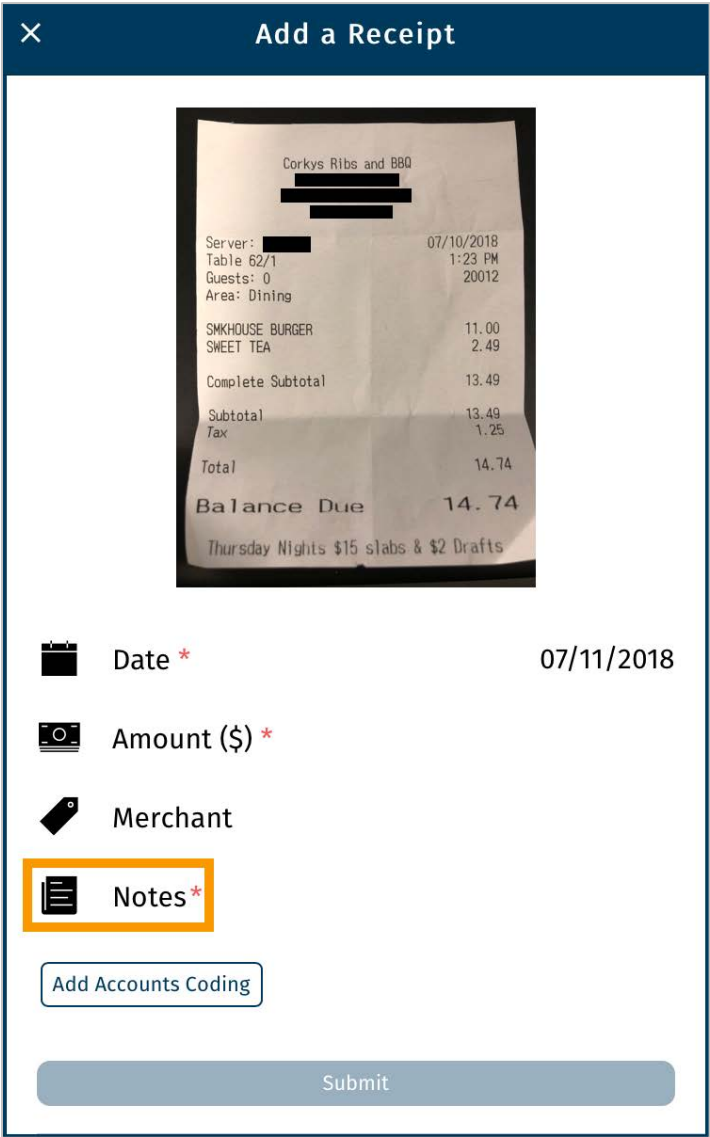
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# Expense Track 18.2 Release Notes

## Require Receipt Image Notes on Mobile App

This item adds the ability for administrators to require notes on receipt images captured on the Expense Track mobile app. When the setting is on, a red asterisk will display next to the **Notes** field on the Add a Receipt screen.

When this setting is applied, and the receipt image is attached to a transaction, the transaction will be in red flag status until a note is entered.



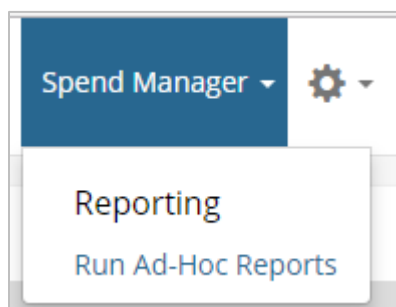
## Expense Track 18.2 Release Notes

### Separate Permissions for Creating and Running Reports

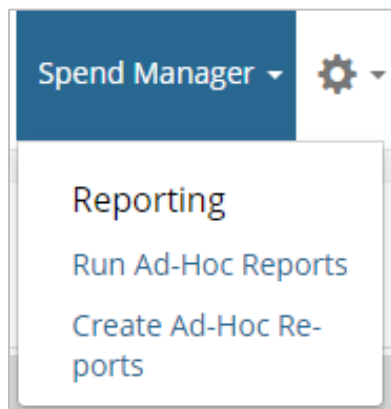
This item adds permission **22 - Manage Reports**. This permission allows users to access the Create Ad Hoc Reports menu, which originally was accessible with only permission **23 - Run Reports**. Going forward, users will need permission **22 - Manage Reports** to create their own customized reports and permission **23 - Run Reports** to run standard reports.

This change provides Administrators better ability to define which system features their users are able to access.

#### PERMISSION 23 – RUN REPORTS ONLY



#### PERMISSION 23 – RUN REPORTS AND PERMISSION 22 – MANAGE REPORTS



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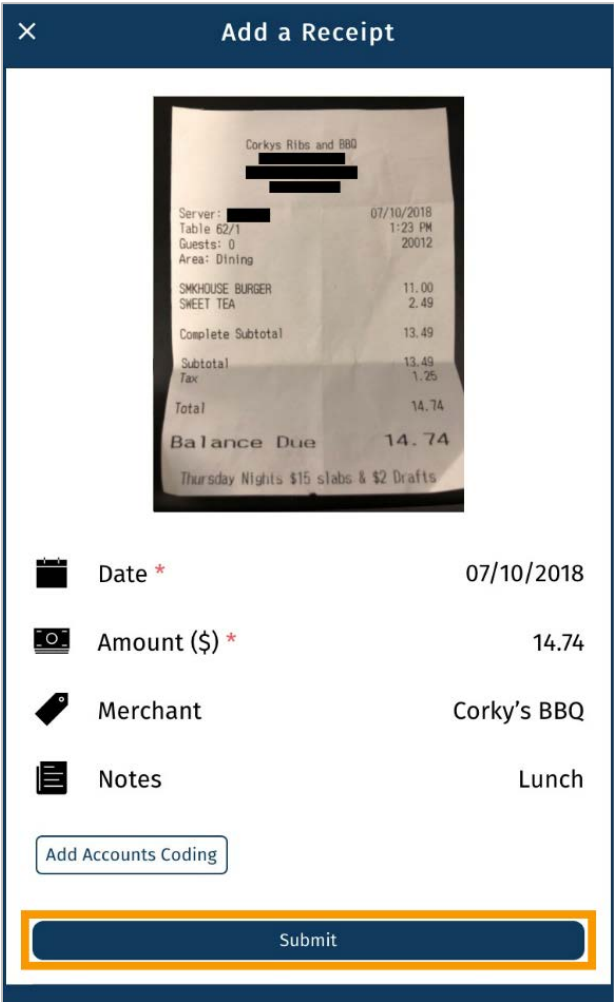
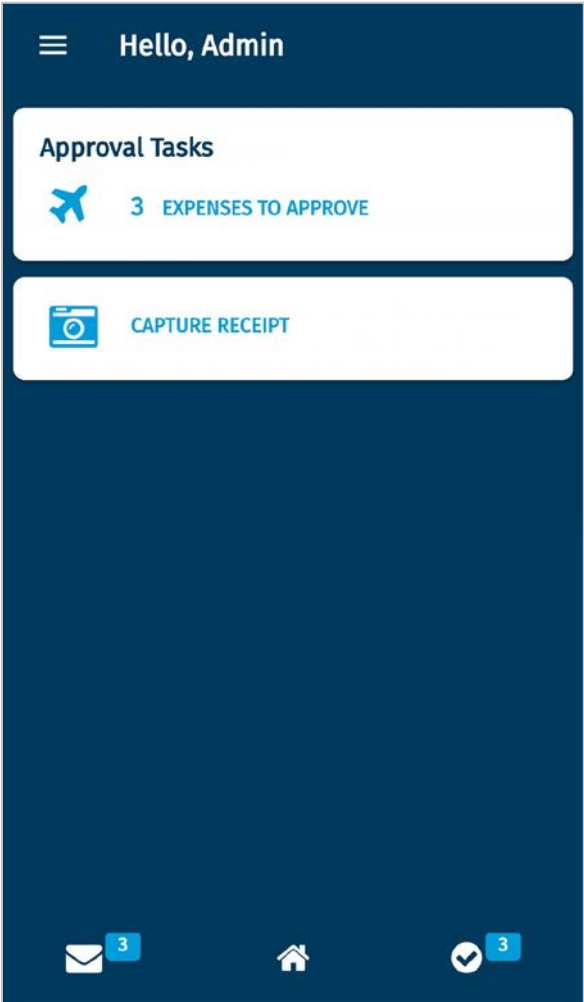
## Upgrade the Expense Track Mobile App

The Expense Track mobile app has received a full upgrade that includes new screens and navigation with some new functionality. Key changes include:

- New layout and navigation.
- New main menu with access to all of your familiar features.
- Updated Home screen that includes quick access to receipt image capture and approvals.

The new design of the Expense Track mobile app provides a simplified user interface that allows users quick access to their most used features, such as capturing receipt images and viewing draft expense reports. See the Expense Track Mobile App user guide (located in the Expense Track Online Help) for more information.

**Note:** If you have not received the new Expense Track Mobile App user guide, contact your Comdata Account Manager.



## Resolve Defects

The following defects are corrected:

- Updated country names for Slovakian and Vietnamese users.
- Removed errors that display when assigning account codes to account code groups with specific external data sources.
- Corrected a defect where the status flag did not display properly on expense items if a required account code was populated.