



## PaperTrl's Latest News and Updates

The team at PaperTrl would like to share what we have been working on! Keep reading to see what changes we have made to our platform.

### New Features

Release Date: July 5th, 2023

#### Approval Workflow

Where to find it: Automations / Create Automation / Define Action / Create Approval Workflow  
PO / Create PO / Select Approver(s)  
Bills / Create Bill / Select Approver(s)

Throughout the system when you select an approver, the system now allows you to only select either an Approval Group or a User per one approval level.

#### Offline Payment Upload

Where to find it: Payments / Upload Offline Transactions / Bills or Expenses

When uploading Offline Transactions, you now have the option to choose between a unique Bills and Expenses upload template.

### **Auto Populate Project**

Where to find it: Bills / Process Bills / Select PO

When processing a Bill and you select a PO it automatically populates the Project from the PO.

### **Vendor Item Upload**

Where to find it: Vendors / Select a Vendor / Items / Upload Item List

Users can upload Item Catalogs received from Vendors directly from the Vendor's record.

### **Item Drop-down List**

Where to find it: PO / Create PO / Item Information / Item Number

When selecting an Item Number for a PO, the Item drop-down list displays the Item Number, Item Name, and the Vendor Part Number allowing you to make only one selection to fill in each corresponding box.

### **Memorization Feature**

Where to find it: Settings / Feature Settings / Memorize Account by Description

When processing Bills PaperTrl currently memorizes the Account Number based on the description of the line item, this feature can now be turned on or off in settings.

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Please share our newsletter with any of your colleagues. If you have questions or need additional resources reach out to your customer success manager, [support@papertrl.com](mailto:support@papertrl.com). You can also reach out to me as well!  
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