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 updates we have made to our platform.

New Features

Release Date: March 15th, 2023

Quick Filter

Where to find it: Any Transaction
Back by popular demand! We have re-added the Quick Filter for each column for all grids throughout the system. You can now search for specific information in any column.

Support Of Duplicate Accounts

Where to find it: Bills / Bills / Create Bill / Expense Cost Distribution / Account Number
PO / Create PO / Account Information / Account Number
When you create a Bill or Purchase Order you can now choose the same Account Number on more than one line item.

Credit Note Export

<u>Where to find it</u>: Bills / Credit Notes / Export

We have added the ability to export Credit Notes to a CSV file.

Support Of Additional Fields While Exporting
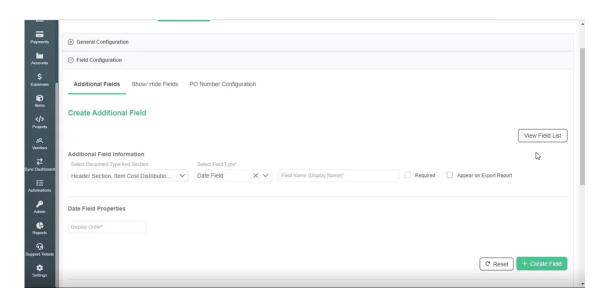
<u>Where to find it</u>: Bills / Bills / Create Bill / Export Add. Fields and Expense Cost Distribution / Export Add. Fields

When exporting a Bill, PO, Credit Note, or Expense Report, additional fields can now be included in the CSV export file.

Please Note:

- This feature is enabled during the creation of an Additional Field. Follow these steps;
  - In Settings, select Field Configurations, Additional Fields and then click Create Additional Field button
  - During creation, make sure you select the check box for the Additional Fields to be included in the Export.

PO Character Extension

<u>Where to find it</u>: PO / Create PO / Notes

PO / Create PO / Item information Or Account Information / Description

The character limit for the PO Header Notes and Line Item Level Description have been extended.

Vendor OCR Memorization

<u>Where to find it</u>: Bills / Bills / Process Bills / Vendor

When processing Bill information, this enhancement uses OCR to automatically capture the Vendor's name instead of you manually entering it.

Automation Workflow Based On Project

<u>Where to find it</u>: Automations / Create Automation / Conditions

When creating an Automation, the Project/Task field is included under Conditions for Bill, Expense Report, and Purchase Order. This allows you to create Workflows based on the selected Project.

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. You can also reach out to me as well!

Alyssa Haidet | alyssa.h@papertrl.com

PaperTrl, 200 E Campus View Blvd, Suite 200, Columbus, Ohio 43235, United States