PaperTrl's Latest News and Updates

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

New Features

Release Date: February 13th, 2023

Filter By Project

Where to find it: Bills / Bills Table / Project

A column for Project has been added to the Bills Table. This now allows you to filter by Project.

Tax Calculation Method

Where to find it: Purchase Orders / Create Purchase Order / Tax Amount

This feature allows you to choose your Tax Amount shown as a Percentage or Fixed Amount.

Vendor Groups

Where to find it: Vendors / Vendor Groups

This addition allows you to create Vendor Groups. You can assign and remove Vendors from their existing group.

Inactive Bills

Where to find it: Bills / Action / Inactive

The Action button on the Bills screen includes the new option to have your Bills be in an "Active" or "Inactive" status.

Hide Inactive Values in Dropdowns

Where to find it**:** Action / Inactivate

Any value that you choose to inactivate will no longer be shown in the respective dropdowns.

Default Date Format

Where to find it: Settings / Company Profile / Select Date Format

You can select a Date Format in Settings. Then when Processing Bills it will be set as your default Date Format.

3 Way Match - Support Multiple PO Receipts

Where to find it: Bills / Process Bills / Item Cost Distribution / PO Receipts

Allows you to select multiple PO Receipts for 1 line item.

Support a Leading Zero on a PO Number

Where to find it: Settings / PO Number Configuration / Running Number

You are able to start the running number of the PO Configuration with a zero.

Edit & Delete from the Detail View Screen

Where to find it: Any Transaction / Action / Detail View

Provides you the option to Edit or Delete directly from the Detail View screen on any transaction.

PO Report Redesign

Where to find it: Settings / Configuration / Field Configuration / Create Field / PO

When you create an Additional Field for a PO you have the option to show or hide that field on the PO Report. This PDF Report can be emailed to vendors. If you create more than 3 Additional Fields at the Line Item level, you will be asked if you would like to print the report in landscape mode to better fit the page.

Limitations

- Cannot exceed 4 Additional Fields in the PO Header
- Cannot exceed 7 Additional Fields at the Line Item level

 A larger logo displayed on the PO Report has also been created during the redesign.

Reporting Enhancements

Where to find it: Reports / AP Detail Report

Includes the addition of "Projects" and "Departments" within the report and available as filters at the bottom left of the screen.

Offline Payment Processing

<u>Where to find it</u>: Admin / Roles / Create Role / Payable / Bills / Bills / Offline Payment Processing

On the action button for a Bill, the addition of "Offline Payment Processing" has been created. When payments are being made outside of PaperTrl, this gives you the option to manually change the status of a Bill to Offline Payment Processing.

Expense Report Visibility

<u>Where to find it</u>: Roles / Payable / Expenses / Expenses / View All Expense Reports

A new Permission has been added where those granted have access to view all Expense Reports. If Permission is not granted, you will only be able to see the Expense Reports you have created or are assigned as an Approver.

Limit Accounts Shown on Expense Report

<u>Where to find it</u>: Accounts / Create Account

For any Account within the Chart Of Accounts you can mark if it should appear on the Expense Report as an option for users to select.

Date Range Filter

<u>Where to find it</u>: All filters

By clicking the date option in any filter, you can now search by a given date range.

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

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