



ONE SYSTEM

AUTOMATE ANY BUSINESS PROCESS

What's new with KwikTag?

The KwikTag Web client, ktX, is now available in release 8.1. A redesigned user interface has been tailored to streamline the experience as you capture, find and share documents; improvements have also been made to the additional functional modules, such as Tasks, which are used when editing or approving documents that are in a workflow. Several performance and administrative enhancements are also included in the release.

ktX Release 8.1 Key Features

Fast and Powerful Search Throughout ktX

- A Search bar can now be found on every ktX screen and module view. This allows KwikTag users to perform keyword searches across all meta-data in the KwikTag system
- Search Templates are also available to enable users to easily perform routine searches, with pre-determined criteria, based on the business need. Examples include searches by date range, vendor, document location and document type.

User Interface Enhancements

- The ktX user experience has been improved to maximize the screen real estate, standardize and modernize the look and feel across the system and accelerate productivity by reducing the number of clicks for KwikTag users

Forgot Password

- Users can now click a "forgot password" link on the ktX login page, which will direct them to a page where they can enter the email address associated with their KwikTag User Account. An email will be sent with a link where they can reset their password; by default, the link expires after 30 minutes.

Document Link Tray Options

- The option to hide or display the Link Tray, used to add supporting or related documents in KwikTag, is now configurable. Professional Services or Support assistance is required.

Document Management for D365 Finance

- Document capture (tagging) and viewing is now supported on more than 60 pages in D365 Finance.

KwikExpense Mobile Client Improvement

- Users can upload receipts and enter the date, merchant, and comments. These fields can be edited and the receipts can be viewed.
- In the KwikExpense mobile client, image editing such as cropping, zooming and rotating are now supported.

KwikPayables Enhancement

- In the KwikPayables workflow solution, real-time duplicate invoice detection and alerts are now supported in ktX.

System Requirements

Operating System

KwikTag can be deployed on a Windows Server 2012, 2016, or 2019 instance, provided it meets the below minimum requirements:

- Clean Server OS Build (not on domain, and no other applications or server roles installed at the time of KwikTag deployment)
- 4 CPUs in 1 socket
- 16GB of RAM
- C:\ drive with at least 60GB of available space
- D:\ drive with at least 300GB of available space

It is compatible with the following Virtualization platforms:

- Hyper-V
- VMWare

Database

KwikTag 8.1 Supports SQL Server 2012, 2014, and 2016 in the following collations:

- SQL_Latin1_General_CP1_CI_AS
- Latin1_General_BIN

ktX HTML5 Client

Recommended and Supported Browsers:

- Chrome (recommended)
- FireFox (recommended)
- Edge (Version 42.17134.1.0 and later with Microsoft Edge HTML 17.17134 and later)

Clients

KwikExpense Mobile Client

Supported Devices:

- Apple devices running iOS 12.3.1 or greater
- Android 8.0 or greater