ONE SYSTEM
AUTOMATE ANY BUSINESS PROCESS

What's New With KwikTag?

ktX New Release Features

Auto-Delegation

- KwikTag now supports the ability to delegate your tasks to the user of your choice if you are away (i.e. vacation). After the KwikTag Administrator makes this feature available, users are able to set themselves to "Auto Delegation" mode and choose a delegate of their choice, so that new Tasks are assigned to the delegate.

- Auto Delegation only takes effect on Tasks that are assigned AFTER the user turns on Auto Delegation. It will continue to function until the user (or administrator) turns Auto Delegation off.

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.

Batch Edit

- In ktX Drawers, multiple documents can be selected and their field values can be edited. The maximum amount of editable documents at one time can be set by the administrator.

Retain Entries

- This feature is now available in ktX Drawers. When Retain Entries is on, the data from the previously "tagged" document populates automatically into the next tagged and uploaded document. This saves time when tagging many documents with common field values.

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.

Default Values

- A KwikTag Administrator now has the ability to specify, per KwikTag User and/or Group, default values to populate the field values when users tag documents.

Other KwikTag Enhancements

Document Management for D365 Finance

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

- KwikTag for D365 Finance features the powerful ability to search, retrieve, and share documents in or out of D365 based on customizable search criteria.

- KwikTag Intelliview™ has been re-introduced, and allows users to attach documents to a transaction, and then KwikTag automatically links related documents throughout a transaction lifecycle. This eliminates the need to manually "link" documents in KwikTag for 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