

Mariner Software

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Customer Service - 2024-04-19 - Managing Library Items and Metadata

Once Paperless has written text retrieved from a library item to the OCR Text field, it will attempt to populate values to fields for the library item automatically.

In this knowledge base article, we outline how this process can typically be expected to work in Paperless, for each of the fields Paperless attempts to populate values to automatically.

Merchant/ Title

Merchant/ Title names are populated by matching text retrieved from a library item against Merchant/ Title names used previously in the Paperless library the library item was imported to.

Here is a brief outline of how this process typically works in Paperless:

1. Paperless reads text from the OCR Text field.
2. Paperless compares text from the OCR Text field against the list of Merchants located under the Default Fields section of Library Configuration.

Amount

Paperless attempts to populate values to the Amount field from text retrieved from a library item. Paperless uses anchor text (such as **Total:** and **Amount:**) and string patterns to attempt to determine the transaction total for a receipt.

Date

Paperless attempts to populate values to the Date field from text retrieved from a library item. Paperless uses anchor text (such as **Date:**) and string patterns in order to attempt to retrieve the transaction date from a receipt.

Frequently Asked Questions

Does Paperless populate fields that calculates values added to other fields?

At this time, Paperless does not populate data to fields that have been calculated from elsewhere. Currently, Paperless only populates data directly from text written to the OCR Text field.

Paperless did not populate fields automatically from a library item. Is

there any way to instruct Paperless to populate fields from an existing library item?

No: at this time, it is not possible to instruct Paperless to attempt to populate data to details fields for a library item that already exists in a Paperless library. Paperless will only attempt to populate data to fields for new library items.

If my library is new, how can I provide a list of Merchants for Paperless to match against?

- **Add merchant names you commonly use manually.** The list of Merchant names used previously in a Paperless library can be reviewed by displaying Library Configuration (select **Show Library Configuraiton** from the View menu) and switching to the Default Fields section. Merchant names can be added manually by clicking the Plus button that appears below the Merchants/ Titles list and entering the Merchant name into the new entry.
- **Add the list of default merchants to the Paperless library.** Paperless provides a default set of Merchants that can be added to a library, to provide a list of commonly-used merchant names.

The list of default merchants can be added to a Paperless library by selecting **Add Default Merchants...** from the **Help menu**