

Therefore™

PEOPLE PROCESS INFORMATION



New Features in v28

Therefore™ Online
Fall 2022



Microsoft Teams Integration



Therefore™ Online v28 integrates with Microsoft Teams. Users can subscribe to receive notifications about changes to workflow processes they are involved in, such as new tasks.

THEREFORE™ ONLINE V28 INTEGRATES WITH MICROSOFT TEAMS TO MAKE WORKFLOW PROCESSES EVEN EASIER.

From within the Teams app, users can process tasks, view the document in Therefore™, or enter additional workflow information. They can also choose to open and process the document in the Therefore™ Web Client.

A screenshot of the Therefore™ Online v28 interface within a Microsoft Teams chat window. The chat header shows 'Therefore 11:47'. The main content is a task card titled 'ProcessInvoice' with the subtitle 'Invoice approval'. Below this, it lists 'Document title:' followed by a table of invoice details: CompanyNo (20), BranchOfficeNo (120), InvoiceNo (1234), InvoiceDate (11/17/2021), and InternallInvoiceNo (150). A blue box contains the instruction 'Instructions for Task: Check the invoice'. Below the instruction are two buttons: 'View Document' and 'Additional information'. At the bottom, a prompt says 'If you're ready, please push one of the buttons below.' followed by two buttons: 'Approve' and 'Reject', which are highlighted with a blue border.

A Microsoft Teams license is required to use this integration.

Filters with Referenced Tables



Therefore™ Online v28 extends the functionality of Referenced Tables. By configuring filter fields on a table, you can filter out available options based on a previously selected field.

EXAMPLE: FILTERING PAYMENT CONDITIONS BASED ON THE SUPPLIER

You have different suppliers who are allowed different payment conditions. Once you select the **Supplier Name** from your table list, you are shown only the **Payment Conditions** that supplier is allowed.

Send to Therefore™ - Incoming Invoice

Save Attachments (0)

Invoice No. INV-2101

Invoice Date 8/11/2022

Invoice Amount 120.00

Supplier Name Moyaware

Payment Conditions

Notes

Payment 90 days after invoice date
Stage payment

Therefore™ Dynamic Web View

THEREFORE™ ACCESS FOR USERS WITH
A WEB BROWSER

Therefore™ Online v28 brings these improvements to the Dynamic Web View experience:

- Export and Send documents
- Print documents
- Access eForms directly from Web View
- Create and save new searches
- Save changes to search filters such as hit-list layout, order, and grouping
- Increased stability and performance



Other Changes

Therefore™ Online v28 includes other changes that help improve system administration, performance, and user friendliness. A full list of changes is available in the Release Notes for Therefore™ Online v28.



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