

Release Notes Priority 18.3

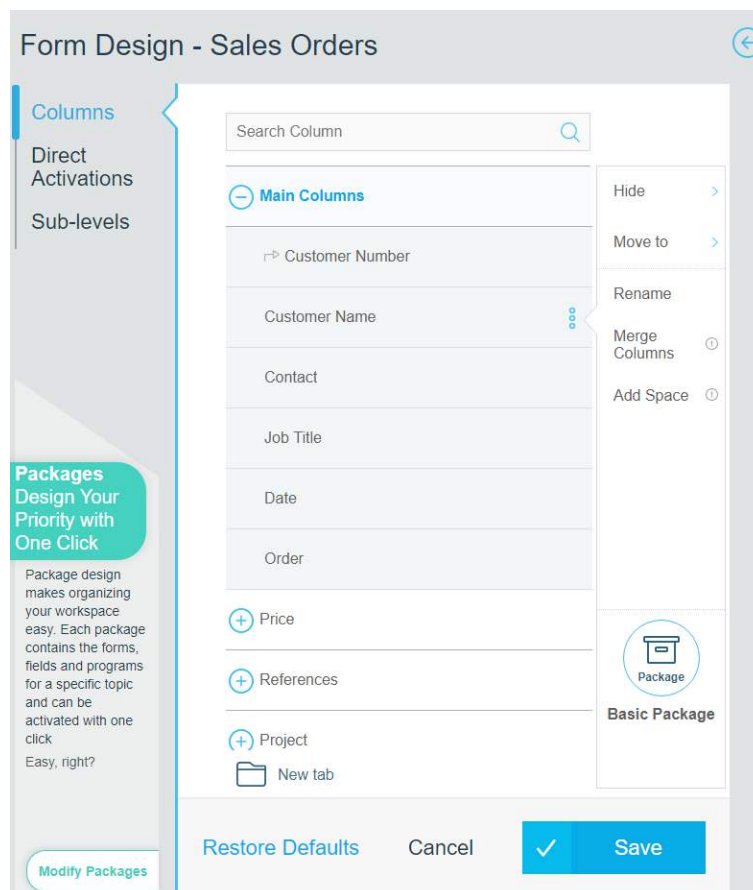
New Design Tool

We completely overhauled the Form Design tool in Priority Web:

- The new window displays the design options more clearly.
- Now you can design fields in forms, sub-level forms, and direct activations in a single dialog box.
- No more digging for that missing column! Simply search for the column, sub-level form, or activation you wish to customize.

We also upgraded the report and document design:

- The new window displays the report components cleanly, allowing you to make changes with ease.
- You can search for a particular component in the report you wish to redesign.
- When designing documents, you can also customize Word templates and use the new Containers feature.



Containers

- A container is a dynamic text component that can be integrated into a Word template and only appears when a predefined rule is met. For example, automatically include holiday greetings in invoices sent near the end of the year and into the start of the of new year.
- Containers are defined in the new Design Document window and use an interface similar to the existing interface for defining business rules and the data generator.

Design by Packages

- Packages enable you to easily customize the system based on your needs. Each package includes the various components (forms, columns and programs) related to a specific topic. For example, if you decide that the Sales Representatives package is irrelevant for your company because you don't work with sales representatives, you can hide that package, and all entities related to the management of sales representatives will be hidden.
- Design by Packages is available in the new Form Design Tool. As part of the Form Design Tool upgrade, each component in the form lists the package to which it belongs, with a short description of the purpose of the package.
- When you choose to hide or display entities in the Form Design Tool, you can choose whether to hide or display the package with which it is associated.

The screenshot shows a 'Packages' configuration window. On the left, under the 'Marketing and Sales' category (9 / 9), a list of packages is shown: CRM, Customer Categories, Product Bundles, Sales Representatives (selected), Blanket Sales Orders, Bonuses and Special Offers, and Price Quotations for Customers. On the right, the details for the 'Sales Representatives' package are displayed, including a description: 'Sales representatives help to expand your business, but it's a good idea to keep track of their performance. This package includes tools to let sales representatives enter deals remotely, calculate commissions due to representatives, set sales targets, and track the performance of each representative.' Below the description are two radio buttons: 'Display Package' (selected) and 'Hide Package'. At the bottom of the window are 'Cancel' and 'Save' buttons.

GDPR

- We've added tools the system to help you meet the new EU General Data Protection Regulation (GDPR). These include an **Entities Requiring Consent** form, which allows you to define privacy policies for each individual with personal information saved in the system (contacts, leads, candidates, and employees).
- A direct activation for sending privacy policies to individuals with personal information saved in the system has been added to the relevant forms (contacts/leads/candidates/employees) to request consent for the policy. A second direct activation enables documentation of the consent, including attaching the document in which consent is expressed.
- Employees who are also users in the system will be asked to provide consent in a special interface upon entering the system.
- We've also added direct activations for sending out saved personal information on an individual (upon request), as well as for deleting that data.
- Various reports have been added for assessing whether consent has been given for the privacy policy by individuals with information saved in the system.

Account Reconciliations and Bank Reconciliations in a Split Worksheet

- We have introduced a new way to manage reconciliations: a split worksheet. This worksheet provides a side-by-side view of the items being reconciled: debit vs. credit for account reconciliations, and bank statement vs. ledger for bank reconciliations.
- Within the worksheet, you can carry out automatic and manual reconciliations. In the case of manual reconciliations, when selecting an item for reconciliation, the system automatically highlights matching items for reconciliation. When you attempt to finalize a manual reconciliation with a discrepancy, the system opens an input window for filling out an adjustment entry.
- New programs for refreshing reconciliation worksheets: **Refresh Acct Recon Worksheet** (for account reconciliations) and **Refresh Bank Recon Worksheet** (for bank reconciliations). Refreshing the worksheet loads up-to-date data for the accounts without having to close or delete pending reconciliations and re-preparing the worksheet.
- The new worksheets are only available in the Priority Web interface.

Isracard Global

- We are offering a new credit card payment gateway: an integration with Isracard Global.
- Isracard Global is launching in the US in 18.3 and will be expanded to additional territories in the future.
- You can sign up with Isracard Global directly through the **Priority** system.

- The payment gateway supports transmitting a single transaction or a file of standing order transactions. Settings for standing orders can be set for a customer, service contract, or sales order/invoice.
- The integration with Isracard Global is only available via **Priority Web**.

Attendance Portal

Priority's upgraded attendance portal expands options for users and managers alike.

All users now have access to the following:

- A new homepage that displays the employee's information, attendance information for the current month, and vacation information (usage and balance)
- Work hour and absence reporting
- Breakdown of work hours, both as a report and in calendar form
- Summary of attendance and absence hours

Managers also have access to:

- A review of employees in the team, including current-day attendance status
- A list of birthdays in the current month for employees in the team
- Attendance reports for employees in the team, including approval of work hours and absence reports

User Interface

- Additional upgrades to Word document templates:
- Documents sent via email based on Business Rules can now be based on a Word template.
- Links and QR codes can now be added to Word templates.
- The saved reports now include reports produced from Word templates.

Financials

Perpetual Inventory

We added various improvements to Perpetual Inventory:

- You can define a separate accounting family for parts subject to inventory control. This option helps manage tracking of Perpetual Inventory entries.
- You can now flag an account in **Chart of Accounts** as a COGS-only account. The system will not allow you to post journal entries that are not related to Perpetual Inventory for this account.
- **Price Variance by Invoice** is a new report that allows you to analyze variances between the cost of items in the Vendor Invoice and Standard Cost by Invoice forms.
- An **Itemized Entry** sub-level form was added to the **COGS Transactions for Document** form (a sub-level form of various inventory transactions). The form displays a breakdown of journal entries linked to the current document, and helps analyze Perpetual Inventory entries.

- We added an account in the **Default Accounts** form for users of Perpetual Inventory called **Purchase – Non-Billable**. This account serves as a default when creating Perpetual Inventory entries for **Goods Receiving Vouchers** (GRVs) which are marked as non-billable and helps the account manager identify entries that require individual attention.

Other Upgrades to Financials

- You can now open a payment to a vendor from a purchase invoice via a new direct activation **Prepare Payment** to prepare a payment by check or bank transfer.
- When preparing for a new fiscal period, you can now open document numeration templates from the **Fiscal Periods** form via the **Open Numeration Templates** direct activation.
- The new **Additional Bank Accounts** form (a sub-level form of **Credit Card Accounts**) lets you define additional bank accounts for the credit card company, in the event that it transfers payments to you in different currencies.
- Additional granularity was added to budget management for prepaid expenses, from budget controls to budget vs. actual reports. In the **Bal. Sheet/P&L Items-GL Accounts** form, you can flag sections to be included in projected budget usage. Amounts in accounts belonging to these sections will appear under projected use in the budget.
- We have made behind-the-scenes improvements to credit and liability calculations, particularly when working with paying customers.
- The definition of an Exchange Rate Adjustment (Credit) account will now affect adjustments entries made at the end of a fiscal period or during account reconciliation.
- **Delete J.Entry Items w/Zero Sums** can now be used to delete zero sum items from multiple journal entries.

Delivery Tracking

- Real-time tracking: Use the new **SUPdStDocLin** logistic constant to determine if the status of documents linked to the itemization of a delivery tracking document is updated when data is recorded in the itemization (e.g. delivery failure) — not only when the status of the upper-level form is updated. Use the new **Additional Status Definition** form added to the **Reasons for Delivery Failure** form to define the status that inventory documents will receive when recording a reason for delivery failure in the tracking document.
- Two new programs enable you to populate a delivery tracking document based on distribution data. **Add Docs to Tracking Itemization** adds shipping documents and sales invoices to a delivery tracking document if the distribution data in these documents match those in the tracking document. **Itemize Tracking Doc (Customers)** works similarly but can be limited to specific customers' documents that are scheduled to be sent from a particular warehouse at a specific date.

Customer Relations

- **CTmpCust** is a new logistic constant that determines whether new customers will automatically open as regular (rather than potential) customers.

Sales, Purchasing, and Inventory

- The **Document Numeration Template** form now has a **Preview** column that displays how the documents will be numbered according to settings entered in the form.

Sales

- You can now define that a price quotation will automatically change its status when being saved as a new edition. The status can be defined in **Additional Status Definitions** (a sub-level form of **Statuses for Price Quotations**).
- Upgrades for ShipEngine users in the US:
 - You can now define multiple shipping accounts per customer in the **Accounts at Shippers** (a sub-level form of **Customers**), instead of in the **Additional Customer Data** form. When entering a purchase order, you can select the relevant shipping account with a shipper.
 - Log screens have been added that document transmissions to ShipEngine and errors that returned.
- You can now bill the customer site that appears in the **Shipping Address** sub-level form.
- Upgrades to the Label Generator have been made for creating an additional label for shipment.
- The direct activation **Customer Shipment** has been added which creates a new customer shipment based on an existing document.
- Printing a Price List now includes the barcodes of the items in the Price List.

Purchasing

- We're helping you take care of your customers: when you open a new purchase order based on a sales order, the new flag **Reserve for Cust** will ensure that the inventory will be reserved for the customer in the sales order when it arrives at the warehouse.
- Save time when entering goods received: you can now open a GRV directly from the **Purchase Orders** form using the **Open Goods Receiving Voucher** direct activation.
- The **Supply Delays** report displays delays in the supply of parts to customers in open orders and historical delays (for orders that have since closed).
- The **Logistic Constants** form has a new constant, **IAvailBal**, which determines whether inventory reserved for specific customers will be included in the calculation of available inventory in **Part Availability** forms.

Warehouse Management System (WMS)

We added support for storage and replenishment tasks at several stages and changed the work process with multi-stage tasks:

- You can now define a default intermediate bin for storage in the warehouse, warehouse aisles, or authorized zones for mobile devices (in the **Storage Zones, Aisles in Storage Zone, Authorized Zones** forms, respectively).
- When preparing documents for tasks in the warehouse, you can now designate the task as multi-staged. An additional input window will open in which you define the intermediate bin according to the default setting for the zone/aisle or by manually entering a bin.
- A variety of Create Wave programs now include an input column that lets you run the wave in simulation mode. The wave will run as usual and produce a report but will not open any warehouse tasks.
- There's a new way to work with Double Check (DCH) tasks: you can now define at the sales order level whether to open a DCH task for packing slips that are picked for the order. When running **Prepare Documents** after the picking task is complete, the system opens DCH tasks in accordance with the definition in the column.
- We've also made several behind-the-scenes changes that led to a significant improvement in performance when it comes to working with DCH tasks.
- **IPutBalBin** is a new logistic constant that determines whether to prefer storage in bins with existing inventory over preferred bins or vice versa.
- In the **Current Warehouse Inventory** and **Current Inventory by Part** forms, a new column has been added for the **Storage Zone** where the inventory is located.
- **Create Issues to Kit Wave** now has a new splitting method, Single Task for all Work Orders, that does not split tasks by the various work orders included in the wave.

Customer Service

- When recording a customer return as part of a service call (in the **Service Report – Parts** form), you can now indicate the status it will receive when returning to the inventory (e.g. if the item is defective).
- The new program **Delete Contract Payments** enables you to delete service contract payments under the condition that it has yet to be linked to an invoice.
- In the **Upcoming Payments for Contracts** report, you can now display data for a specific date (rather than for the current or next month).

Serialized Part

- The **Logistic Constants** form now includes a **CEndWarranty** constant, which determines whether to delete warranty data for a serialized part when it is returned by a customer.
- Serial Stamps will now appear in documents that include printing of a group of serialized parts. The Serial Stamp will follow the serial number, with a hyphen between them.

- The **Audit Trail for Item, History of Components**, and **Audit Trail for Serial Numbers** forms now include columns that display the cost in the local and secondary currencies for the serialized part. In addition, these columns have also been added to the **Audit Trail for Serial Numbers** and **History of Components** reports, which can now also be run via direct activation from the **Catalogue of Parts w/Serial Nos.** form.
- The **Catalogue of Parts w/Serial Nos.** form now also includes **Last Incoming Trans** and **Last In Trans Code** columns. These columns display the purchasing inventory transaction (Goods Receiving Vouchers or Vendor Invoice) through which the serialized part was entered into inventory.
- The **Prepare Servicing Plan** program now cancels service calls that were opened for servicing in the past but did not take place.

Meters

- The new **Kit-Billed to Rding** column added to the **Payment Details for Meters** form (sub-level of **Payment Installments**, itself a sub-level of **Service Contracts**) displays the number of pulses up to which the customer has been billed for a meter whose billing method is Pulse Kits.
- The **Sources of Meter Readings** form now has several flags for defining the reading source (e.g. Orders, Service Calls, etc.). Additional flags include **Reading After Reset** (for a reading that resets the meter prior to it being transferred to a new customer) and **Correction** (for cases where the previous reading was too high and must be revised downwards). In the event of a correction, preparation of payments now accounts for a negative quantity in a meter reading.

Production

- The **Bill of Materials with Routing**, **Bill of Materials**, **Multi-level BOM Graph**, and **Bill of Materials w/ Part Specs** reports now include an input option to limit the report to approved BOM revisions only.

International

- The new **Customer Sales per State** report enables you to analyze sales data by country in which the goods were sold.

US

- You can now load bank statements that use the OFX format into the system.

Canada

- Sales document printouts (**Sales Invoices**, **Multi-Shipment Invoices**, **Over-the-Counter Invoices**) now display PST VAT and GST VAT.

Europe

- VAT Reports in Europe now support subsidiaries.
- The **Journal of Vendor Invoices** report now includes the option to display Customs VAT.

- The new **WithheldTax for Invoices** report provides details of withheld tax at the vendor invoice level. This report is for countries where withholding tax for the vendor occurs when recording an invoice rather than during payment.

Portugal

- We've made minor improvements to the SAFT interface.

England

- A **Find Address by Post Code** program has been added to additional forms that include postal codes: **Branches, Sales Representatives, Warehouses, Personnel File, Company Data, Companies, Drivers/Shippers, and Bank Account Details.**

Mobile

- The **Application Generator** now includes the option to copy an existing application, which is helpful when you want to create a new application that is similar to an existing one. This option is particularly useful when you want to create the same application in another language.
- A new Purchasing Authorization app is now available in online app stores.
- Many upgrades have been made to the **Priority Master App**:
 - Run programs and reports that include input.
 - Search for data more granularly with form.
 - Slide left or right to move between records in single-record view.
 - Open links that were sent by email in the appropriate application.
 - Utilize AM/PM time support for users in the US.
 - Create your own applications on the basis of new pre-defined applications in the **Application Generator** added to Sales, Purchasing, Customer Service, and Project Management.

System Maintenance

- We made the system more secure! We added the new **Uploadable File Types** form: the system will block uploads of file types that do not appear in this form.
- For users of the API module: The new **API Transaction Count** report allows you to easily keep track of the number of API transactions utilized in a specified period. The report displays the number of transactions utilized by each user and the forms for which the transactions were utilized.
- Improvements to the **Tabula Task Scheduler**:
 - Following the improvement in 18.2 that generates commands for running programs via the Tabula Task Scheduler, we've now added support for generating reports that are sent to a recipient via the **Tabula Task Scheduler**. In the event of entities with a similar name (program/report), you can now specify the type of entity in order to generate the appropriate command.

- The new **Refresh Task Input by User** program, added to the **Define TTS Tasks** form, makes it easier to update the program input used for a program or report.
- The new **AutoTTSExport** system constant allows you to determine whether when recording or revising a task, the scheduler file is updated immediately or only when the **Record Tasks in TTS File** program is run.

Programming

- We've released a new version of **Web SDK**. A full list of changes can be found in the **Developer Portal** at <https://prioritysoftware.github.io>.