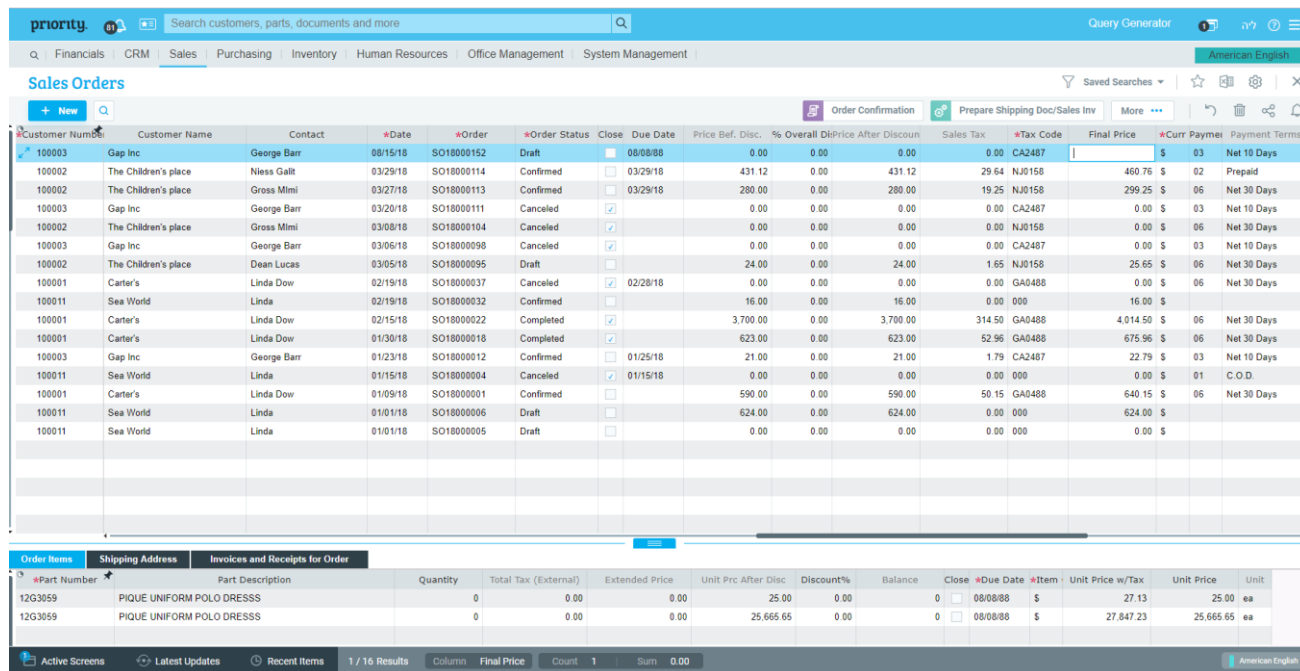


Release Notes Priority 19.0

Main Upgrades in the New Version

User Interface



Priority is proud to introduce the new design of forms in the web user interface (UI), which allows you to work with the system more easily and intuitively. The main changes to the UI include the following:

Form Enhancements


- We've removed the sidebar that displayed the **Form Navigation**, **Direct Activations**, and **Active Screens** to allow for a wider view of your working space, whether in multi-record or full-record display mode.
- Form navigation data (e.g., company and results) and **Active Screens** were moved to a new footer along with **Recent Items** (entities last used) and **Latest Updates** (documents last changed). You can also see **Active Screens** at the top right of the screen (🔍) as usual.
- We've split the upper toolbar into two, one for operations that affect forms and the other for operations that affect the current record.
- In multi-record display mode, a new splitter (☰) appears between upper level and sub-level forms. By sliding the button up or down, you can control the size of the forms and decide which form should have more lines visible.
- Various options for customizing forms have been consolidated under the gear icon (⚙️) in the toolbar. It opens a menu with options for customizing the design of forms, defining rules and templates, and preparing labels.
- The default view when opening forms is the multi-record display mode. However, the system will remember the last display mode you selected and

will open the form the next time in that mode. (If your system was set up to display full-record display by default, you will not be affected by the change.)


- Read-only form columns are now colored in light grey, which makes it easier to differentiate between columns in which you can retrieve and edit data and those in which you can retrieve data only.
- The breadcrumb navigation in the upper menu bar now also displays sub-levels:

Sales Orders > Order Items > **Inventory for Part**

Usability Enhancements

- The new focus view keeps you focused on a single record, ideal for opening a new record. You can access it by clicking the **New** button (directly under the form name), or by clicking the **Expand** button () when in multi-record view (which appears besides the currently selected row).
- **Actions** (formerly "**Direct Activations**") are now accessible from the toolbar. We left visible the two primary actions associated with the business flow for a document. (For example, for **Sales Invoices**, the visible actions are **Finalize & Print Invoice** and **Record a Receipt**.) Other actions are accessible from the **Actions** drop-down list, which you can find by using the search field or just scrolling. This provides users with cues as to what their next action should be. Visible actions aren't set in stone. You can change them with the form design tool.
- Do you need to know the status of your document? Now it's easier! The **Status** column was transferred to a fixed location in the main area of the form, so the status of the document is visible at all times. This change will not affect users who already customized their form design.

Advanced Search

- The more prominently positioned **Advanced Search** () interface (the upgraded **Query Generator**) in the upper toolbar is easier to use and more powerful. Especially exciting is the ability to search for multiple separate values in the same column. For example, in the **Sales Orders** form, you can search for orders that have either a status of Draft or a status of Ready. You can also save a search and then reapply it from the **Saved Searches** option in the toolbar and define a default search. The **Advanced Search** interface is also accessible from the **Saved Searches** by clicking **Create New Search**.

Additional Improvements to the UI

- The menu design tool was also upgraded to the format of the other design tools (the report and form design tools). Now it displays information on the packages linked to each menu.
- Now when you want to add a container to a document you are formatting, you can add a URL link and not just text.

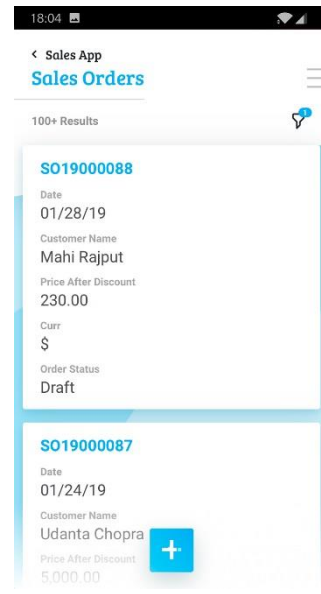
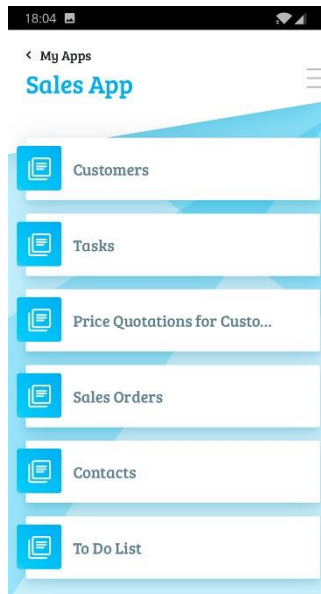
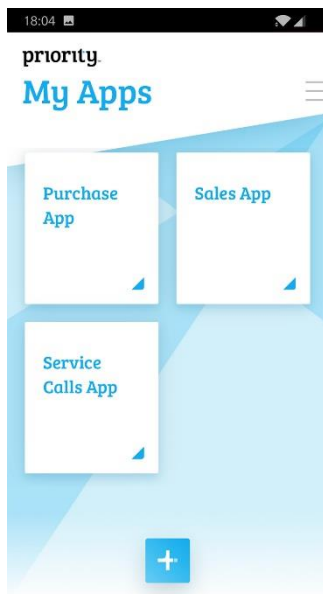
Detailed information on the new web user interface of **Priority** 19.0 is available in the [User Interface Guide](#).

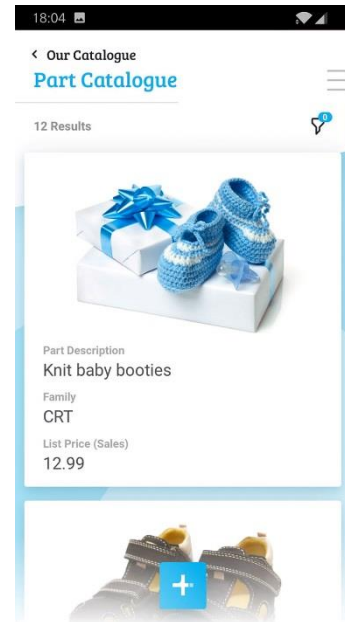
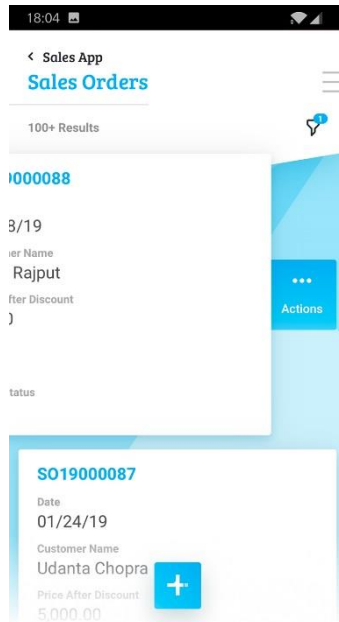
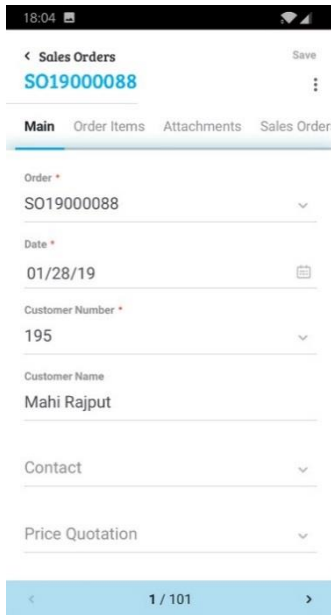
Mobile Solutions

We are thrilled to present the new user interface of **Priority Master**, the **Priority** application generator for mobile devices and tablets. The new interface is more user friendly, with many upgrades that make working in the application easier.

So what's new?

- **My Apps:** Return to **My Apps** (the home page/main menu) from any form.
- **Side Menu:** Open the application menu from any form and move to a different company easily.
- **Submenus:** Add submenus in applications.
- **Record Display:**
 - View item pictures in full- or multi-record display mode.
 - Quickly access actions more quickly in multi-record display mode.
- **Safe Save:** Save forms only after all required columns are filled.
- **Tablets:** Tablet apps are supported.





Click2Pay: Credit Card Payments Directly From the Invoice

With the new Click2Pay service, your customers can pay directly from the invoice you send to them.

You can define which customers will have the option to pay directly for an invoice by credit card via a payment link. For these customers, a **Secure Payment** button will be added to the digital invoice or a QR code to the printed one. The link will transfer customers to a secure payment page where they can complete the payment. (For this service, you must have a credit card clearing service module and open a business account via **Priority's** payment gateway.)

- In order to define those customers who can pay for invoices by credit card directly from a payment link, we've added an **Add Inv Payment Link** column to the **Financ. Parameters for Customers** form. Flagging this column indicates that this customer will have the option to pay directly for the invoice by credit card via a payment link that will be added to it.

priority.

MULTI-SHIPMENT INVOICE

INVOICE TO
Aviva Teseraz
Kinsdale Rd
Cork

Invoice No: **552190000082**
Customer No: **01794**
Invoice Date: **03/03/19**

Item Description	Unit Price	Quantity	Discount	Total
Babcock Forceps TC - 45deg Angle 12" - special 2	EUR 0.21	305.00 ea	0.00%	64.05

Sub Total 64.05

Tax 0.00

Payment due by: 03/03/19

GRAND TOTAL EUR 64.05

Secure Payment

priority.

Payment for DS Chemport (AUSTRA...

Easy to pay invoices

Payer Name: Aviva Teseraz
Invoice Number: 552190000082
Payment Due: 03/03/2019
Payment Sum: 64.05 EUR

Make Payment - 64.05 EUR

Secured Payment

Powered by priority

For detailed information on setting up payments directly from the customer invoice, refer to our [standard operating procedures](#) on the subject.

Financials

Payments to Vendors by Company Credit Card

It is now easier to manage credit card payments to vendors:

- In the new **Company Credit Cards** form, you can manage your company's credit card details.
- The **Payments by Bank Transfer** form is now called the **Pay by Bank Transfer/Credit Card** form, and you can use it to prepare payments also by credit card.
- We've added support for documenting credit card payments as part of recording vendor invoices. After finalizing the invoice, a relevant payment document will be opened in the **Pay by Bank Transfer/Credit Card** form:
 - To the **Invoice - Add'l Details** form (a sub-level of the Multi-GRV and Vendor Invoices forms), we've added the following columns: **Paid by Credit Card, Credit Card Name, First Installment, Amt Each Add'l Paymt**
 - These columns were also added to the **Expense Invoice Work Area** form so that it can serve as a complete work area for receiving billing and recording payment by company credit card. After exiting the form and running the **Open Expense Invoices** program, an invoice and payment will automatically be opened and reconciled for each expense.

You can learn more about managing payments to vendors by credit card in the standard operating procedures on [vendor payments](#), [vendor invoices](#), and [multi-GRV invoices](#).

Customer Credit

Do you want to track customer credit for each of your branches separately? Now you can!:

- The new **Branch Cust. Credit Definitions** form (a sub-level of the **Financ. Parameters for Customers** form) allows you to assign credit limits to customers by branch.
- The new **Customer Credit by Branch** form is used to track credit for selected customers in branches. The form displays the customer's total credit and its components.
- We've also added supporting reports: **Customer Liability by Branch, Customer Credit by Branch,** and **Cred./Liability Limits by Branch.**

Clearing Credit Card Transactions

- Now you can sign up for the credit card pricing plan of your choice (in areas where we offer more than one plan) via a new **Pricing Plan** input in the **Open Business Account** program.
- We've added support for registering businesses in the UK, Canada, and Australia. After opening your business account, you'll be asked to complete registration with the payment gateway. When you OK the message, you will be redirected to an online form to fill out. You have the option to do so later by running the new **Complete Web Registration** program from the **Isracard Clearing Definitions** form.

Fiscal Years

- To the **Define Fiscal Years** and **Fiscal Periods** forms, we've added a **History of Changes** sub-level form that documents changes resulting from programs that open or close fiscal periods.
- The new **Document Numeration** constant allows you to number documents according to fiscal years and not only by the calendar year.

Perpetual Inventory

- A new value was added to the financial constant **COGS Method: 4, Record perpetual inventory online by actual costs**. If you specify this value for the constant, perpetual inventory transactions are recorded automatically when an inventory document is finalized, not just when manually running the **Post Inventory Accounting Entries** program. This method of perpetual inventory uses default definitions and does not require any additional configuration of inventory transactions.
- We've also added support for automatically recording journal entries for and assembly and inventory conversion transaction.
- A new journal entry type, **Issues**, was added to the **Journal Entry Codes** form, which help identify inventory transactions in the General Ledger.
- The new report **Check Part Inventory Valuation** displays the inventory accounts in the system and the inventory values of parts linked to each account. If you define the new value for the **COGS Method** constant, actual inventory values are displayed in the report.
- The term *COGS* (cost of goods sold) was largely replaced throughout the system with the more industry-familiar term *inventory accounting*. Perpetual or periodic *COGS* was changed to perpetual or periodic *inventory* throughout the system.

For more information, see our [standard operating procedures](#) on the subject.

Other Upgrades to Financials

- We've added a **Budget Item** column to the **Financial Parameters for Parts** form so that you can link budget items also to part numbers and not only to the account. The budget item will be filled in automatically in orders and invoices based on the part.
- The new **Journal Entry to be Rec. for Inv** program, which you can run from various invoice forms (such as a sales invoice, over-the counter invoice, and multi-shipment invoice), lets you preview the journal entry that will be recorded against an invoice before you finalize it.
- When working with cash-based accounting, we've added support for using over-the-counter invoices. A new **Pro Forma Invoice** column has been added to the **Over-the-Counter Invoices** form so that a pro-forma invoice can be linked to an over-the-counter invoice.
- The **Check VAT on Expenses** report has been upgraded to display the sums of VAT on expenses based on journal entries.
- Receipts and over-the-counter invoices with foreign currency transactions will now display the exchange rate used when the receipt was recorded.
- Two new forms, **Unpaid Invoices** and **Unpaid Pro Forma Invoices**, allow external systems to retrieve and display open invoices using **Priority** APIs.

- The new **Prior Retained Earnings** report helps you to analyze the balance in the Prior Retained Earnings account. The report includes journal entries in the Retained Earnings account as well as the differences between the opening and closing balances from the previous year, and displays them as fictional journal entries.

Attendance

- Now you can offset monthly overtime also from the lowest to highest rate according to the new value of the payroll/financial constant **OvertimeOffset**.
- You can now run the **Check Proj Hr Reports** report also directly from the **Project Hr. Reports-Work Area** form. The report is run per employee and month, according to the selected line in the form.
- The new payroll constant **WorkAfterNightShift** (in the **Payroll Definitions** form) allows you to define the conditions by which an employee who worked the night shift is exempt from coming to work the following day.
- Now it's easier to track your employees' shift rotations. You can define a different background color for each shift using the new **Color in Calendar** column in the **Work Hours at Branch** and **Shift Rotations** forms.

Sales, Purchasing, and Inventory

- You can now specify permanent attachments when printing or e-mailing price quotes, sales orders, purchase orders, and purchase requisitions using the **Fixed Attachments** sub-level form. These can be defined per document or document type, and will always be added to these documents.

Sales

- We've added support for the integration of e-commerce systems into **Priority**. The new **eComTempCust** constant determines whether incoming orders to **Priority** from an e-commerce system will open on the name of a walk-in customer or a regular customer.
- Two cost-per-unit columns were added to the list of possible columns in the **Sales Report Generator**, one for the local currency and one for a secondary currency. Now you can easily calculate the cost per unit even for the same part in different invoices.
- We've added **Email** and **Mobile Phone** columns to the **Shipping Address** sub-level form of many sales documents, which also enables you to interface more easily with e-commerce websites.
- To the **Copy Sales Order** program, we've added the option to also copy details into the **BOM for Order Item** and **Order Items – Remarks** sub-level forms of each item. To do so, flag the new input columns **Incl. Item Remarks** and **Incl. BOM for Line** when running the program.
- By flagging the new column **Prnt Lnkd Doc Attach** in the **Financ. Parameters for Customers** form, you can also include in the attachments of a multi-shipment invoice (for printing purposes) the documents on which the invoice is based (shipping document, service call, etc.).
- Now you can define different order-closing tolerances for purchase orders and sales orders by using the new **Close Sales Ord Tol%** and **Close Sales**

Ord Tol. columns that were added to the **Inventory Parameters for Parts** form, along with the renamed **Close Purch Ord Tol%** and **Close Purch Ord Tol.** columns.

- When running the **Copy Price Quotations** program, you can flag the new **Copy w/o Costs** column if you don't want part costs to be copied from the original price quote but rather to be recalculated for each line in the copied quote.
- The new **Update Quote by Version** program (run from the **Price Quotations for Customers** form) allows you to overwrite the current price quote with a previous version of the quote.
- You can now print the customer statement in a new print format that includes a report listing each invoice number and all the relevant customer's purchase orders that are linked to it.

Inventory

- You can now run the **Part Availability** and **Part Availability - Detailed** reports by part family and status.
- The new planning constant **FixFirstRev** lets you define whether the first BOM version for a part for which versions are maintained can be changed when the first version is also the only one that exists (i.e., whether you can change the details in the **Child Part** and **Child Part Designations** sub-level forms, themselves sub-levels of the **Parts** form).
- You can now load inventory into the system using the **Interim Table-Inventory Count** in factory units instead of buy/sell units. To do so, flag the new **Factory Units** column in the form.
- In the **Child Parts** form (a sub-level of the **Part Catalogue**), we've added a **Part Availability** sub-level form with its own **Part Availability – Details** sub-level. This way you can see the availability of each child part without having to drill-down to the **Part Catalogue** for each one.
- We've made several updates to documenting inventory disposal:
 - The new **Disposal Reasons** form provides an area to view and define disposal reasons for inventory parts.
 - An **Expiration Date** column has been added to the **Disposed Items** form (a sub-level of **Inventory Disposal**) to display the expiration date of the work order/lot to which the part being discarded is assigned.
 - Additionally, the option to add a signature at the bottom of documents was added to the **Print Inventory Disposal Doc.** program.

Purchasing

- In the **Print Checks on Blank Paper** program, we've added the option to record comments on the check.
- The **Copy Purchase Order** program now has an input column to specify the branch for which to open the new purchase order.

Warehouse Management System (WMS)

- The **Pick Whole Pallets** column was added to the **Storage Zones** and **Storage Zones in Warehouse** forms, which allows you to set limits on picking from pallets in a storage zone to either picking whole pallets or whole master pallets.
- The **Pick Master Pallets** column was added to the **Pick Strategies** form. If flagged, when running a pick wave using the strategy, the system will recommend picking only from storage zones for which "Pick whole master pallets only" was selected in the new **Pick Whole Pallets** column in the **Storage Zones** form.)
- The new logistic constant **IPlanFlags** enables you to update inventory valuation at the bin and zone level, not just at the warehouse level (modify the following inventory valuation and planning flags: **Incl. Invent Valuatn**, **Incl Entries in Cost, Ignored by Planning** in the following forms: **Bins in Warehouse, Bins in Storage Zone, Storage Zones in Warehouse, and Storage Zones**).

Human Resources

We've made improvements to recruiting and job handling:

- Additions to the **Jobs** form:
 - The form was upgraded and is now more detailed following the addition of many columns, such as **Overtime Hrs-Monthly, Position Type, Substitute For, Recruitment Reason**, and more...
 - The **Print Job** program can now be run from the form. This program lets you run a report with selected job details, including the job description, position type, job requirements, costs, and many more details.
 - The following sub-levels were added:
 - **Job Costs**, in which you can view and record the various components of the cost of the job in the upper-level form
 - **Job Authorization**, which you can use to authorize the job
- The **Job & Applicant Definitions** menu now also contains the following forms:
 - **Position Type**, in which you can record the various position types in your company
 - **Reasons for Leaving**, in which can record the possible reasons for leaving the work place
 - **Job Authorizers Lists**, which you can use to view and edit authorizer lists for jobs at your company
- The **Organizational Chart Definitions** menu now also contains the **Divisions** form in which you can record the names of the divisions in your company.
 - A **Division Code** column was added to the **Branches** form to display the division in your company to which the branch belongs.

Production

- For a kit that will be shipped to a subcontractor, now, when recording a work order in the **Kits to Ship** form for a part that is still in production, a line will automatically be added also for shipping the manufactured part in the **Shipped Items** form.
- MRP planning for manufacturers now takes into account scrap also at the operation processing level, not just at the part processing level.
- After recording the production details on operations for work orders (or parts) in the **Reporting Production Details** form, the system now checks whether inventory from a single pallet may be received into two different bins/warehouses, according to the setting of the logistic constant **IPalletInv**. If inventory from a given pallet is recorded in two different bins, and the value of the constant is **1**, you will receive an error message.
- Now when receiving a manufactured part from a subcontractor's warehouse without a work order, the system will display a warning message with a reminder to fill in the work order number.

International

- Improvements in **Priority's** interface with ShipEngine:
 - The **Ship by ShipEngine** program now includes the option to view the price rates of optional shipping methods offered by several carriers for your order.
 - Now you can track shipments sent through ShipEngine: run the new **Package Tracking - ShipEngine** program from the **Customer Shipments** form to produce an HTML report that displays the delivery status of the shipment.
 - To the **Bill of Lading - Additional Data** form (a sub-level of **Customer Shipments**), we've added the **Length**, **Width**, and **Height** columns so you can define the dimensions of the packing crate you plan to ship without using crate codes. The new read-only **Unit of Measure** column displays the unit of measure flagged as the default for ShipEngine.)

For more information, see our [standard operating procedures](#) on the subject.

US

- The NACHA interface now also supports the CCD payment type. You can designate a payment method of PPD or CCD format as the default for vendor payments via NACHA by flagging the new **Default for NACHA** column in the **Payment Methods** form.

Europe

- We've added a **Tax Code** column to the **Interim Table-Customers/Vendors** forms, which allows you to designate a tax code for transactions with the current customer or vendor. This allows you to work more easily with customers in Europe where there are multiple tax codes for customers and vendors.
- We've also added support for meeting SAFT requirements in Portugal by adding a **Tax Exempt Reason Codes** form in which you can define reasons

for exemption. You can also specify an exemption reason for an invoice, tax code, or tax group by using the new **Exempt Reason Code** column that was added to many invoice types as well as to the **Value Added Tax** form and the **List of Tax Groups** form. The code will be added to the SAFT file for submission.

UK

In keeping with the regulatory changes in the UK, **Priority** now supports the submission of VAT returns in the online Making Tax Digital (MTD) format, which comes into force April 2019:

- You must run the new **Set Up for HMRC's MTD** program to grant **Priority** the right to submit VAT on your behalf.
- When running the **Submit VAT Return** program, select **MTD** in the new **Submission Format** column (you still have the option of submitting in the Government Gateway format). The new **Transmission Type** column in the **VAT Transmission Log** will fill in according to your selection. If you are submitting the return on behalf of a VAT group, flag the new **VAT Group** column.
- The **VAT Transmission Log** form also displays these additional read-only columns: **Transmission Type**, **Period ID**, **Processing Date/Time**, **Payment Method**, **Charge Reference No.**, and **Form Number**.
- The **Connection Details-Online VAT** form now displays a **Token Code** column, which is filled in automatically when the **Set Up for HMRC's MTD** program is run.

For more information, see our [standard operating procedures](#) on the subject.

Programming, System Maintenance, and Misc.

- Support was added for securing web services with the OAuth2 protocol.
- Now you can use the **Privilege Explorer** program to assign privileges to users also for Word templates.
- The **Procedure Link** form (a sub-level of the **Compiled Programs** form) now has its own new sub-level, **Procedure Parameters**, which allows you to display the parameters of each procedure (from the compiled program is run) without opening it in the **Procedure Generator**.
- An **Inactive** column was added to the **Users for Application** form (a sub-level of the **Applications for License** form) to more easily identify inactive users who are still utilizing an application license.
- You can find detailed release notes for the Web SDK and REST API at [Priority's Developer Portal](#).