

Priority Release Notes v21.1

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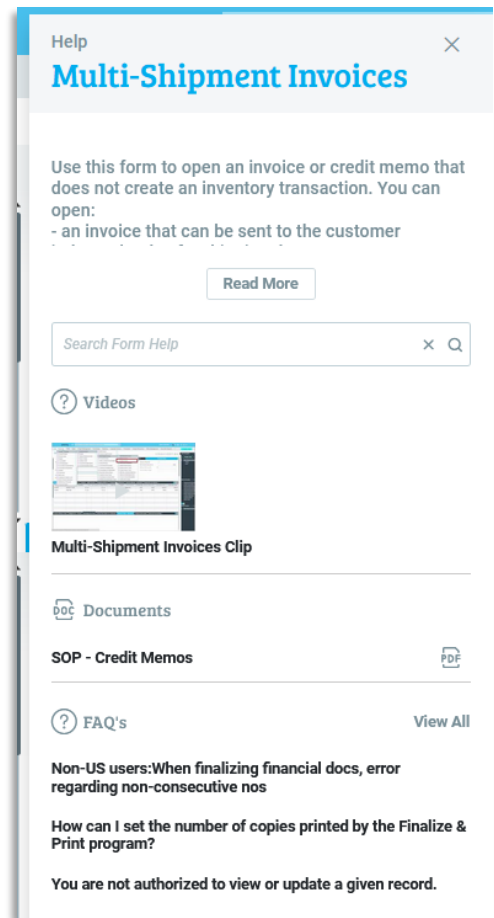
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User Interface

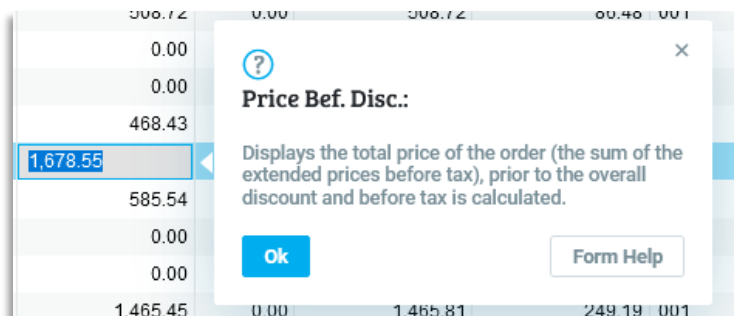
- **All the help you need, in one click** - Working in a form and need a little help? Want to find all the relevant content in one place? Click the new **Help** button in the form header.



When you click the **Help** button, a side panel instantly opens showing you the help for the form, in addition to videos, SOPs, and FAQs related to working with this form. You can read the content in the side panel or open it in Priority Xpert, where it originates. Use the search bar in the side panel to narrow down the results and find the answer you need right now.

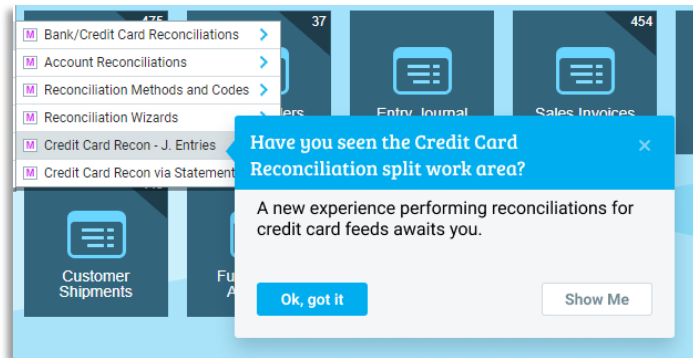


- **Field Help (F1)** - To better clarify which field the help pop-up refers to, we redesigned it. The pop-up opens next to the field (and not in the center of the screen), and a small arrow points to the relevant field. If you didn't get all the information you needed from the field help panel, click the **Form Help** button to view additional useful content (as mentioned above).



As always, open the field help pop-up by right-clicking and selecting **Field Help** from the context menu, or by pressing **F1**.

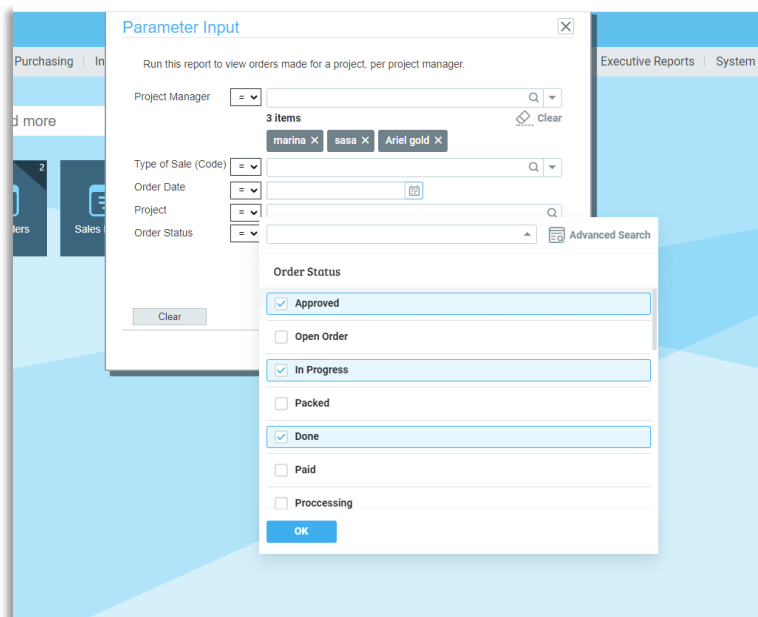
- **Feature announcements** - To introduce you to new practical features, you will occasionally see a message or an icon inviting you to try them out. You'll see these announcements in the context of your work (when you're entering a form, for example), so you can experience how relevant these new features are to your daily work.



- **Multi-value filtering in reports and programs** - Select multiple items in program and report input with a list. When you click the arrow next to the relevant field (such as Sales Rep., Customer Number, etc.) a search list will appear. Narrow your results by typing, just as you do in forms' search and choose lists. Use the checkbox to mark the relevant values (they will be visible as tags under the field) and continue running the program/report.

This functionality is available also in Priority Mobile. See below.

If you prefer, you can continue to choose items as you have always done till now (by clicking the magnifying glass or pressing **F6** twice).



- **Create a report in PDF format** - You can now open a report in a PDF file when running the report from the menu (just as you do from within the document).

Priority Mobile

- **Accessibility** - We are committed to providing a user-friendly experience of Priority Mobile to the general public, including vision-impaired users. We have invested efforts to enable and streamline the use of the app for the visually impaired.

As part of these efforts, users who use text readers on their mobile devices will also enjoy a voice guide in our app.

- Voice indicator when entering the app navigating it.
 - These support users in opening new documents, searching data and running programs.
- Simple and clear navigation using common gestures, such as slide and double tap.

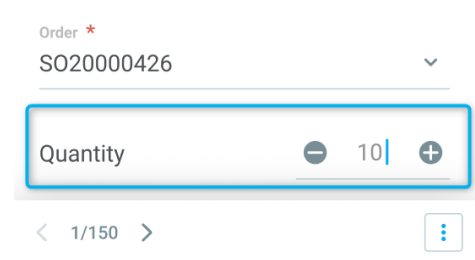
- **Print labels** - Print labels directly from your mobile device.

Check the **Print Labels** checkbox in the **Application Generator** for each form you want to allow to print labels.

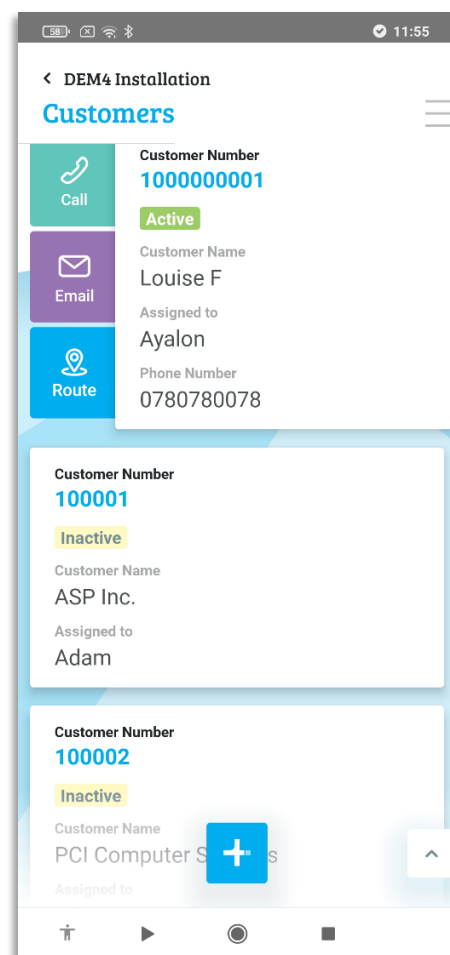
- This is relevant to NiceLabel users.

The screenshot displays the mobile app interface for 'Warehouse Manage...'. The title 'Goods Receiving Vouchers' is prominently displayed in blue. Below the title, there are 10 results listed. Each result card contains the following information: Date (11/06/21), Status (Final), Vendor Number (200007), and Vendor Name (The Base Effect). A 'Print Label' button is visible next to the first result card. The interface is clean and user-friendly, with a blue header and a white background for the results.

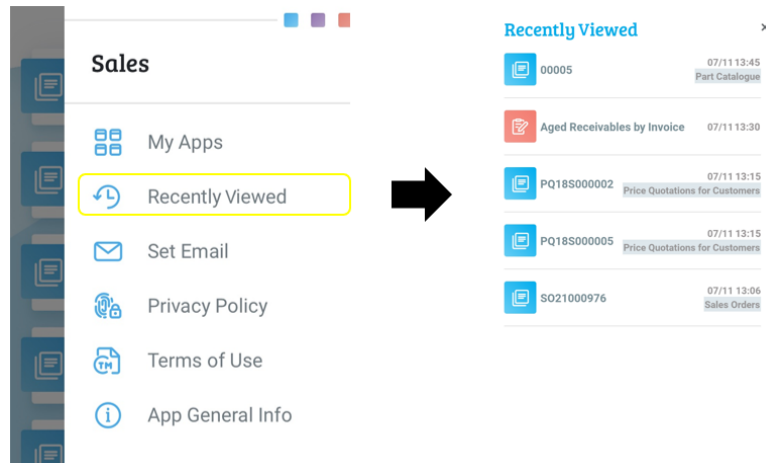
- **Updated Quantity field in Priority Mobile** - The Quantity field now has a new look. You can quickly update the quantity by tapping the new + and - buttons.



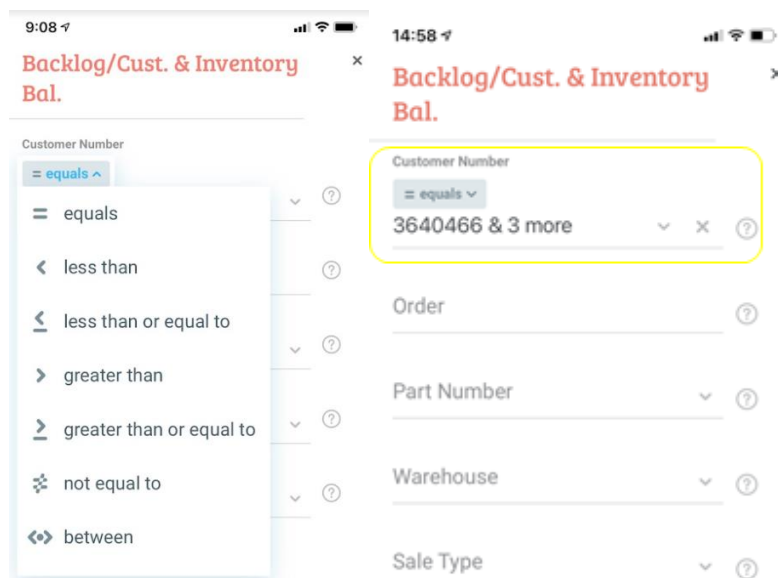
- **Open a GPS navigation app** - Make your way to your customers directly from Priority Mobile. We've added support for opening navigation apps directly from a document, with the relevant address fed directly into the app (e.g., the customer's address). You can open a GPS app by sliding the document to the right and clicking the Route icon. After that you can choose which GPS app to use (Google Maps or other apps you use).
- **Swipe to call, email, or drive** - When looking at a list of documents (such as a list of sales orders), swipe a record card to:
 - Call the document's contact
 - Email the contact (your email app will open with the contact's email address)
 - Open a GPS app with the relevant address (such as the customer's address)
 You'll see the relevant icons only if the phone number, email, and address are defined in the document.



- **Switch between documents** - Use the new **Recently Viewed** section to open documents you recently worked on without having to navigate your way through the menu and repeat the search for the document.

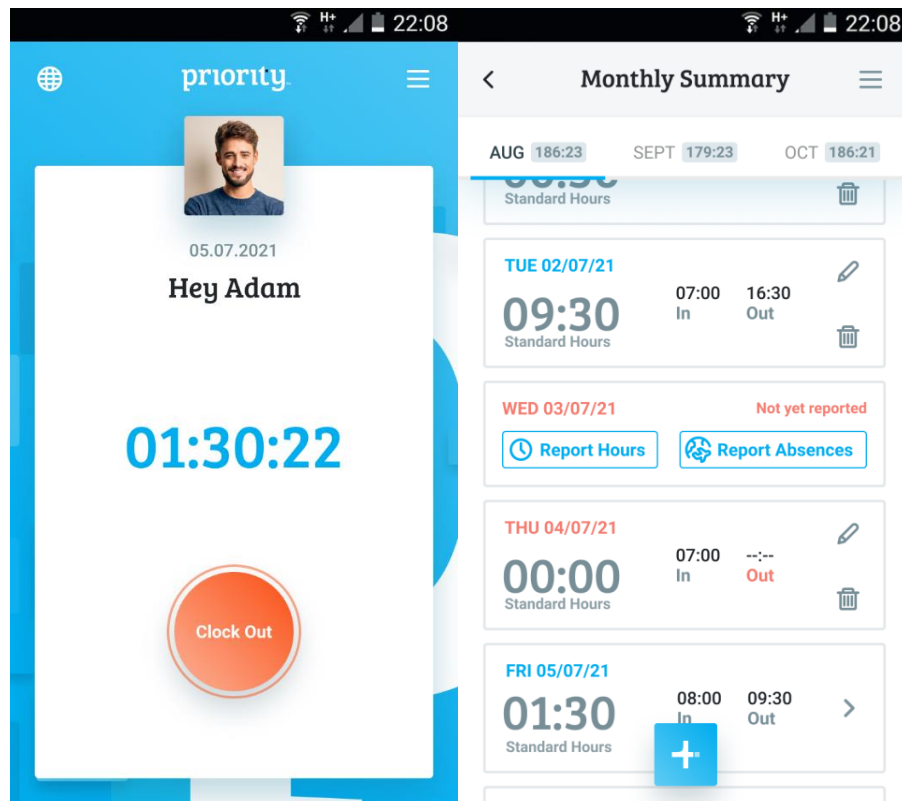


- **New features in programs and reports** -
 - **Multi-value filtering** - Select multiple items in program and report input, also on your mobile. When you click the arrow next to the relevant field (such as Sales Rep., Status, etc.) a results list will appear. Narrow your results by typing, just as you do in forms' search and choose lists. Mark the relevant values (they will be visible as tags under the field) and continue running the program.
 - **Field operators** - You can now use field operators when choosing input for programs and reports.



The Customer Number field after choosing the **equals** operator, and selecting four customers.

- **Edit text forms** - You can now edit comments in a text form (such as the **Sales Orders - Remarks** form) and add your automatic signature just as you do in the text forms on the desktop.
- **Add a file attachment** - Now in iOS, you can add a file attachment (as already supported in Android).
- **Priority Time Sheet app** - Enjoy the newly upgraded app.



- The app supports external identification (using an email address) and internal identification (username and password).
- Those working with external identification must use the new app.
- Use the app to clock in and out in a second, report absences, see your monthly summary and much more.

For more information about **Priority Time Sheet** and how it works, see the [SOP](#).

Financials

Budget

- **Multi-company budget** - Do you work in a multi-company setting and use the budgeting functionality? With our new offering, you can now set up a multi-company budget in the system, that is, a budget that has one allocation from which many companies can pull. View budget use by each participating company through the various budget utilization forms and reports in the system.
- **Separate periodic budget** - You can now set the periodic budget control to be performed monthly or quarterly, without taking into account the annual cumulative budget. To do this, set the new financial constant **Budget Control** (BudPrdSprt) and choose the type of periodic control in the new **Periodic Ctrl Type** field in the **Budget Items** form.
- **Integration with budget planning systems** - We added the new **Budgeted vs. Actual - Detailed** form and a dedicated program for filling this form that is designed to run at night in the task scheduler. The form is dedicated to connecting via API and reading actual data by third-party expert budget planning tools.

Priority Payments

- **Priority Payments Transactions form** - Use the new form to easily find transactions using an external transaction ID.
- **Payment collection from the mobile** - Your field agents can now clear over-the-counter invoices and receipts from their Priority mobile app.

Distributed Organizations

As part of our strategy to support organizations that work in a multi-company setting (within the same installation), you can now run the following programs in a multi-company mode:

- Open Fiscal Period
- Close Fiscal Period
- Open Numeration Templates
- Set VAT Report Period
- Transfer Prepaid Exp/DeferredInc
- Transfer Sums to VAT Account
- Transfer Opening Balances

This version includes more features supporting distributed organizations, such as data distribution, MRP by branches, and more. You will read all about them later in the document.

Revenue Recognition

- The system can now automatically calculate fair value for document line components or document revenue components.

The allocation of value can be calculated in one of two ways:

- FVA1 - allocation according to the price list price of one of the components in relation to the value of the document, or the document line, and the automatic allocation of the rest to complete 100% of the total fair value.
 - FVA2 - allocation according to the price list price ratio of the components among themselves.
- When recording revenue recognition, the project, the profit center, and the related project activity will also be recorded in the posted journal entry.
- When recognizing revenue by percentage of completion, you can now manually set the date for which this percent of completion was true. The system will use that date in recognition progress and perform actual recognition by it.

Read more information in the [SOP](#).

More in Financials

- **Bank Reconciliations** - When performing vendor/customer bank reconciliations, you can now choose whether the references in the journal entry posted to the ledger will come from the original journal entry or from the entry line item. You can choose this in the **Reconciliation Defs-Custs/Vends** form using the **Refs. from Journal** checkbox.
- **Journal entry details** - For traceability and to have the possibility of investigating journal entries, we added the **Entry Journal > Journal Entries for Document > Linked Invoice Lines** sub-level form, which lists the invoice lines that comprise a journal entry line of an expense or income type.

Country-specific Features

Europe

- You can receive purchase invoices in which only some of the item lines are part of the reverse charge scheme. The familiar logic of registering input and output VAT will be applied to these lines, while for the rest of the lines, input tax only will be recorded as usual.

The Netherlands

Priority is proud to present the **new localization for the Netherlands**.

This localization includes:

- VAT report based on the VAT by Boxes report.
- Financial Audit File for submission during an audit.
- Intrastat files according to the regulations in the Netherlands.
- Electronic invoices in Peppol format for sending by email.

For more information about this localization, see the [SOP](#).

United Kingdom

- We made technical adjustments to the HMRC requirements for VAT transmission.
- We now support the management of EORI numbers for customers. This was also added to the sales document printouts for invoices and shipments.

Belgium

- **Support for a structured identifier in vendor invoices** - You now can include the structured identifier number (**OGM**) in vendor invoices, and use it as a reference in the SEPA file, to assist with the reconciliation of payments on the vendor side.

If you specify the OGM identifier, you will not be able to set up payments for multiple invoices. You will need to set up a separate payment for each invoice.

- **Interface with CodaBox** - In Belgium it is customary to send electronic invoices by email or via Accesspoint. We enabled working with one of the leading Accesspoint providers - CodaBox.

*This feature will be released following the version release.

Portugal

- We added an option to classify vendors and generate a withholding tax report according to the vendor classification.

Canada

- You can now define separate VAT accounts for tax groups using the tax components codes that make up the combined tax code.
- We now support the option to not deduct purchase tax for certain tax groups under certain tax components of the combined tax code. To do this, you can specify the *LineItems* dynamic value in the group tax account. If you define this value, the relevant tax amount of the invoice will be recorded against the expense of that invoice.

Poland and Argentina

- We separated the printing of invoices for Poland and Argentina into a new program - **Print Invoice/Cred Memo(ARG/POL)**.

Supply Chain Management Sales

Customer Price Lists

- **Set an expiration date for price lists** - You can now assign an expiration date for customer price lists in the **Price Lists** form. Using the **Cancel Customer Price Lists** program, price lists whose expiration date has passed will automatically be canceled, and will no longer be used as a price source for the various documents. Add this program to the Tabula Task Scheduler to streamline this process.
- **Discount percentage in the customer price list** - We added the option to set a discount percentage for items in the customer price list.
- **Update customer prices** - Update product prices for customers directly from price quotations and sales orders. Do this directly from the **Price Quotations for Customers** and **Sales Orders** forms. Use the new action in these forms to update the prices in the **Price Lists** form or in the **Special Part Prices for Custs** form depending on what you choose.

For more information on customer price lists, see the [SOP](#).

Click2Sign

With the Click2Sign service, you can allow your customers to approve documents by signing them online easily. This way you can save your customers from printing out the documents, signing them by hand, then scanning and returning them by email. The signed documents are automatically saved in your Priority as attachments and do not need to be saved manually.

We've updated this service as follows:

- To view the signer name on a signed document, we added a **Signed By** tag to the MS-Word templates, which displays the name of the contact who signed the document. To use this option, add the tag to the relevant print format.
- The signing mechanism was adapted to suit private customizations, and allow you to add your own logic that is activated as part of the signing process. For more information, see the [SDK](#).
- **Cancel automated emails** - You can now cancel automated emails by marking the new **No Email to Assigned** checkbox in the **Definit. for Documents with BPM** form. By marking this checkbox, you are preventing the system from sending automated emails to the user that is defined in the **Assigned to** field. This option is useful when you want to send emails with your own private solution as mentioned in the previous bullet.
- **Branch logo** - TheClick2Sign interface now supports organizations that use a different logo for each branch.

Click [here](#) to read more information about Click2Sign and start working with it.

Rentals

The rental module, which allows organizations to rent equipment to end customers and charge them for the rental period, has been updated as follows:

- **Multiple serial numbers in one rental line** - You can now list multiple serial numbers for the same rental line and dates by filling in the **Serial Numbers** sub-level form under the **Rental Items** sub-level of the **Rentals** form.

For more information on Rentals, see the managing rentals [SOP](#) and the billing rentals [SOP](#).

Return of Goods:

- **Blocking the return of goods from customers** - You can now block recording customer returns by:
 - Defining in what time frame goods can be returned (according to the date of shipment) by setting the new logistics constant **Date limit for customer returns** (CustRetCheck). For example: goods can be returned within 14 days from the delivery.
 - Defining the customer status by marking the **Block Return** checkbox in the **Statuses for Customers** form and thus preventing a customer with this status from opening a customer return document.
- **Linking a customer returns document to several origin documents** - You can now link a customer returns document to several origin documents in the new **Link Customer Returns** sub-level of the **Customer Returns** form. There you can link to several documents of the same type (Customer Shipments, Sales Invoices, and Over-the-Counter Invoices).
- For customers who work back to back between the customer and the vendor, we added a shortcut to the **Returns to Vendor** form directly from the **Customer Returns** form (in the form's action list).
- For more information, see the [SOP](#).

Purchasing

Vendor Price Lists

- **Set an expiration date for price lists** - You can now assign an expiration date for vendor price lists in the **Vendor Price Lists** form. Using the **Cancel Vendor Price Lists** program, price lists whose expiration date has passed will automatically be canceled, and will no longer be used as a price source for the various documents. Add this program to the Tabula Task Scheduler to streamline this process.
- **Update vendor price list** - Update vendor product prices automatically according to the prices recorded in the purchase order or price quotation. Do this directly from the **Purchase Orders** and **Vendor Price Quotations** forms. Use the new action in these forms to update the prices in the **Vendor Price Lists** form.

For more information on vendor price lists, see the [SOP](#).

Dropshipping

Dropshipping is the process of shipping goods directly from your vendor to your end customer.

Using this process, you can now:

- Open a shipping document or a sales invoice when recording a goods receiving voucher by running the new action in the **Goods Receiving Vouchers** form (as an alternative to opening this document from a vendor invoice, which is already supported).
- Running the **Finalize & Print Invoice** action from the **Vendor Invoices** form will now open a shipping document or a sales invoice for a dropshipping-related invoice (as was already the case when running the **Finalize Invoice/Memo** action).

For more information on working with dropshipping, read our [SOP](#).

Vendor Rating

- We added the ability to measure your vendors' performance. Vendors will be automatically ranked based on ratings you give them for compliance with delivery times, allowing you to make business decisions based on this information. In this process you will define the rank of different types of delays, and according to the delays recorded in purchase orders, the system will calculate a score for each vendor. You can see the score of each vendor in the **Vendors** form. You will also see the scores of all vendors in a report. Read all about this solution [here](#).

More in Purchasing

- **Authorize Vendor Pro Forma Invoices** - You can now authorize **Vendor Pro Forma Invoices** using authorizer lists (similarly to working with authorizer lists in the **Vendor Invoices** form).
- **Copy requests for price quotations** - Use an action from the **Requests for Price Quotations** form to duplicate a request for a price quotation from a vendor.
- **Open a purchase order based on a price quotation** - Use the **Open Purchase Order for Quote** action from the **Vendor Price Quotations** form to open a purchase order based on a price quotation.
- **New statuses for vendor quotations** - After opening a purchase order linked to a vendor's price quotation, the status of the order will change to **Order Opened**. This will help you easily identify that an order was opened based on a vendor's quotation. To support this feature, we added two default statuses to the **Statuses for Vendor Quotes**

form and two new checkboxes to define these statuses, for when an order opens or is canceled.

More in Sales and Purchase

- **Billing/credit calculation when opening a final invoice** - Use the new **Recalculate When Reopening Final Doc (IRecalcDeb)** logistics constant to set that when you open a final invoice, it will be recalculated, which might change the **Billable** check box in the document. The relevant types of documents are service calls, shipping documents, customer returns, goods receiving vouchers and returns to vendors.
- **Reset quantities when deleting pending invoices** - You can decide that — when deleting pending invoices that perform inventory transactions — the quantities in the documents will be automatically reset (there is no need to use a different program to reset the quantities). This is done by setting the new logistics constant **Reset quant. to 0 when deleting invoices (RstInvTrans)**. The relevant types of documents are vendor invoices, sales invoices, and over-the-counter invoices.
- We added the **Project** and **Project Description** fields to various customer and vendor invoice printouts.

Inventory Management

- **Inventory Allocation module** - As a solution for organizations that want to reserve goods for a customer when placing an order (to make sure they can provide the products to the customer), we added a new inventory allocation mechanism. You can now allocate inventory for sales orders directly from various documents, as well as from a designated work area. For more information, see the [SOP](#).
- **Warehouse Transaction Control** - Companies can now implement a control mechanism that only allows employees to create inventory transactions in the warehouses to which they are assigned. For more information, see the [SOP](#).
- **One-click label printing** - Click the new **Print Label** button in the form header to print labels instantly. You can see this button only in forms where you have labels defined (Label Generator). The label will be printed according to the settings defined in the **Prepare Label** program in the **Settings** menu.



- Priority Mobile users also enjoy one-click label printing. Details in the Priority Mobile section.
- **Add parts using one program** - Use the new **Part Setup** program to create new part numbers in the system quickly and efficiently, without switching between the various forms to update part information (such as the Part Catalogue, Financial Parameters for Parts, Inventory Parameters for Parts, etc.).
- You can now attach documents by using the **Attachments** sub-level form to the forms below:
 - **Raw Material Lots**
 - **Expirations and Extensions**
 - **Laboratory Release**
 - **Warehouse Transfer**
- **Printing relevant attachments to a shipping document** - When printing a shipping document, you can also print the attachments of the linked work orders and the raw material lots (according to the **Shipped Items** sub-level form). To print the attachments together at the same time, attach the documents to the **Attachments** sub-level form of the **Raw Material Lots** form and the **Expirations and Extensions** form, and mark the **Print WkOrd/RawM Att** checkbox in the **Customer Shipments** form.

Country-specific Features

- **Printing documents in foreign languages** - We expanded the ability to automatically print various documents in a variety of languages, according to the language of the document recipient. This service was extended to the text forms in the Part Catalogue. Learn more about this solution [here](#).

ShipEngine

We added new abilities to the ShipEngine integration, a service that manages communication with different shipping companies (UPS, FedEx, etc.) to receive shipping price quotations and purchase shipping directly from the system.

- **Markup** - You can automatically add extra costs (such as handling fees) to the shipping costs lines that are recorded according to the costs reported by the shipping companies.
- **Return labels** - you can now ship out goods with return labels (in addition to the shipment labels).
- **Kilogram**- We added support for kg as a possible unit of weight.

Read [here](#) about the **ShipEngine** module to learn about all the possibilities.

Engineering

- **Manufacturing change order (MCO)** - For organizations that need to approve a list of manufacturers of a part before they can be used, we added the ability to approve part manufacturers using the engineering change order (ECO).
- **Checklist for engineering changes** - You can now create a checklist for different types of engineering changes. This can help organizations that are interested in opening tasks for implementing the engineering change after its approval (for example, tasks for warehouse, purchasing, planners, etc.).
- **Approval of a part revision by ECO authorization** - Validating a part revision can be done automatically when authorizing an ECO. To set this, mark the **Valid Part Rev.** checkbox on the **Statuses for ECOs** form.

Read more about the engineering module [here](#).

Production Planning

- **MRP by branches** - It is now possible to run industrial MRP and purchase planning by branch, with each branch separately receiving its recommendations. This suits organizations that have branches operating independently in terms of purchasing, storage and production, and need to receive purchasing and production recommendations separately for each branch. For more information, see the [SOP](#).

Service

- **Guarantee period** - For companies that provide a long-term guarantee, we expanded the **First Period (Mos.)/Second Period (Mos.)** fields to 3 characters (instead of 2) in the **Warranty Codes** form.

System Maintenance and Misc.

- **Master Data Management (MDM)** – we added new features to the **Data Distribution (MDM)** module, formerly called **Data Exchange (EDI)**:
 - Use the **Add Company to Data Exchange** program to select the interfaces to which you want to add a new company.
 - With the **Send All Records via Interface** new program you can send all the table columns that meet the criteria defined in the interface.
 - When using the **Send with Data Exchange** program (under the **Options menu > Mail**) in a form, you can select to which companies the data will be sent. You can also choose to send only one record or all of the records in the form (that meet the criteria defined in the interface).

The changes in this version and the previous version (21.0) affects all EDI users upgrading to this version. Changes in version 21.0 include the integration of data exchange into the application server, and adding the ability to run interfaces in parallel. Both lead to a significant leap in interface performance.

- ❖ Please note! Following the upgrade, electronic interfaces will need to be reconfigured. See the [SOP](#) for more information.

- **Document Status History Report** - You can now generate status history reports for various documents by running the new **Document Status History Report**. This report can provide answers to a variety of business questions, such as, "Which documents have been in a particular status for more than X time? And, which documents moved to a specific status during a specific period?".
- **Copying attachments between documents** - You now have additional options to copy attachments from one document to another (for example, you can copy the attachments of a blanket purchase order to a purchase order). See all the options for copying attachments between documents and enable those relevant to your business in the **Copy Attachments to Docs Defs.** form.
- **Restricting sending attachments by email** - By setting the new system constant **Maximum attachment size per email** (MAXATTACHSIZE) you can prevent sending emails with attachments above a certain size (in megabytes).

- **Locating fields in form** - In some cases, there may be more fields in a form than can be physically displayed. When new fields are added to forms that are already full, we will automatically hide them so you can continue working as normal. If the new fields are mandatory, when you open the form we'll ask you (via a system message) to design the form manually.
- **Download apps** - The **Priority Mobile Scan Code** program you used to create QR codes for the Priority Mobile app now also supports the **Priority Time Sheet** app. Therefore, we changed the name of the program to **Application Links**. When running the program, you can choose whether to generate a QR code for Priority Mobile or for Priority Time Sheet. See more information in the [SOP](#).

Developer Tools

- **REST API** - When updating data in sub-level forms, the REST API will provide the context for the action and return the relevant data from the upper-level form under which the change was made.
- Auto-unique fields are now displayed and tagged as such now in the API. The option to update existing records according to their auto-unique key has been blocked.
- You can now record general error messages that can be read from any code in the system, without having to add them to each form/procedure. For more information, see the [SDK](#) for this version.
- **Additional options for working with WSCLIENT:**
 - If required, you can now send TLS authentication data (i.e., a digital certificate).
 - We added an option to save the headers received in response from the web service to a file.
- We added a new parameter to the WINHTML program, where you can specify the desired print format for the document. This eliminates the need to specify the format in the PRINTFORMAT table. For more information, see the [SDK](#).
- **Write Help Text** - Writing help text for new fields and entities added in private developments is now more accessible. Help forms now work as regular text forms- you will see a text editor in the help forms. In addition, you can use the new sub-level forms in the generators to translate help text to other languages. This is possible thanks to changes we made to the help infrastructure in the system (F1).