priority

Release Notes Priority 17.1

User Interface

Improvements to **Priority Rich**:

- Customize the look of your forms by choosing a Dark/Light color theme from the **Design** menu.
- The row of shortcuts in forms includes two new shortcuts: **Delete Record** and **Send Record Link**.
- Additions to the home page:
    - Entities on the home page are now organized separately from the **Favorites** menu and each can be designed differently.
    - You can add entities to the home page using the dedicated Add Entity mechanism (+ sign on the home page), from the Search for Entity tool and from the Main Menu.
    - A new **Latest Updates** menu (below **Recent Items**) provides quick access to recently updated documents, so long as their status causes them to be included in any user's to-do list. You can view the document type, number and other details of each document.
    - The **LatestUpdates** system constant limits the number of documents that will appear in the **Latest Updates** menu.
    - Additional design features – You can rearrange the home page tiles by drag & drop, or remove them by dragging to the trash can.
    - A triangle in the upper corner of a home page tile displays the number of documents of that type that are assigned to you. Click the triangle to access a display of these documents in your to-do list.
- New Search for Entity capabilities: add the entity to the home page and open the **Privilege Explorer** directly to the entity.
- Search results now open in a new form, allowing you to return to the form after opening a document.
- Improvements to the **Privilege Explorer**:
    - The **Privilege Explorer** has been redesigned to visually and intuitively display privileges for each entity.
    - The new explorer displays an indicator for every entity that has not yet been assigned privileges.

- The **Privilege Explorer** can be opened directly to a given entity, both from the menu and via the Search for Entity tool.

Payroll, Time and Attendance

- A new **Create Pay Classes** program provides an easy way to open new pay classes in keeping with labor laws.
- You can run the **Payroll Data for Employee** program by Direct Activation from the **Personnel File** form to easily open records with basic payroll data.
- The **Daily Reported Hours Overlap** program provides a new tool for attendance control.
- A **History of Changes** sub-level was added to the **Payroll Definitions** form.
- A new mechanism for enforcing labor laws enables you to track employee labor law infringement. The mechanism includes:
    - A new **Definition of Labor Laws** form in which to define pay requirements by law.
    - A new flag in the **Pay Classes** form determines whether to check for labor law infringements based on attendance reports of employees in this class.
    - A new report displays employees' labor law infringements.
- New options for overtime calculations:
    - New options for the **DailyOvertime** payroll definition support calculations of overtime when the shift runs into the next calendar day.
    - For users of Time & Attendance: the **OvertimeOffset** constant determines how overtime hours are offset for employees who have exceeded their global overtime or approved overtime threshold.
        - You can now define **Global Overtime Offset** per pay class or individual employee. If a global salary employee exceeds his/her overtime hour limit, the system will calculate the overtime hours due and offset the defined global overtime hours.
        - You can now define the number of **Approved Overtime** hours per pay class or individual employee. If an employee exceeds his/her approved overtime threshold, these hours will not be taken into account in salary calculations.
- A new **Yearly Summary for Employee** report displays annual payroll and attendance data.
- A new **Prep Salaries for All Employees** program allows you to use the **Task Scheduler** to prepare salaries when the data authorization mechanism for payroll groups is activated.

Financials

- You can use the new **PrepaidExpDays** financial constant to indicate the number of days back for prepaid/deferred amounts to be considered when the **Transfer PrepaidExp/DeferredInc** program is run.
- A new digital stamp icon was added to e-documents.
- A new **Cancel Open Period** program allows you to cancel the opening of a fiscal period opened by mistake.
- A new **Account to Credit** column in the **Financial Parameters for Vendors** form allows you to define another A/P account to credit when invoices are recorded for this vendor.
- The new **Set Text for Customer's Invoice** form (sub-level of the **Customers** form) allows you to define set text that will appear on invoices for a specific customer.
- A new **Income Account** column, added to the **Financ. Parameters for Customers** form, allows you to define default income accounts per customer.
- A new **Main Addresses-Invoices** flag in the **Customer Sites** form (sub-level of **Customers**) allows you to define a site as the address to which to send multi-shipment, export (dual-currency only) and pro forma invoices.
- Profit centers for purchase orders are now copied from previous documents (purchase demands, vendor price quotes, sales orders and blanket orders).
- The **Prepare Payments** program now supports payment of pro forma purchase invoices (flagged in the **Flag Invoices for Payment** form), as well as regular invoices.
- Dual-currency users:
  - You can use the new **PostdateDays** financial constant to indicate the number of days back for postdated checks to be considered when the **Cash Postdated Checks** program is run.
  - Support for bimonthly VAT reporting - A new **TransSumsToVAT** financial constant allows you to determines whether VAT is reported on a monthly or bimonthly basis.

Warehouse Management System (WMS)

- The new **Add to Packing Slip** column in the **Warehouse Task Items** form enables you to include PIK and PAK task items in an existing packing slip. When preparing documents, instead of opening a new packing slip, the parts will be added to the designated slip. If the column is empty, the system will open a new packing slip.
- Addition to the **Pick Algorithm** form, sub-level of **Pick Strategies**: "Inventory w/small difference from demand before inventory with large diff". Flag this step as active if you want the system to suggest picking from a bin with a quantity that is closest to the amount

required. Flag **Reverse** if you want inventory with a larger difference from demand to be used first.

- You can now select individual parts to replenish when running the **Create Replenishment Wave (Inv.)** program**.**
- The new **PSurplusRcv** constant allows you to define how a receipt of parts that exceeds the amount ordered (beyond the part's defined order tolerance) will be recorded in GRVs opened for an RCV task via a mobile device. The excess amount can be linked to the last open purchase order or added as a separate line to the GRV and not linked to any order.
- You can now record new serial numbers in MOV tasks.
- A new BPM flow chart was added for maintaining statuses of containers.

Delivery Scheduling and Tracking

- You can now schedule delivery for individual order items:
  - Use the new **SOrdDelivery** logistic constant to determine whether entire orders or individual order items will be scheduled for delivery.
  - Order items can be scheduled automatically or manually.
- The **Delivery Days** form (sub-level of the **Customers** form) can be used to define the days of the week and the times at which the customer regularly receives deliveries.
- The **Itemized Tracking Document** form, sub-level of the **Delivery Tracking Documents** form, can be used to record the expected time of delivery to the customer. If a time range was defined in the **Customers** form, the time recorded there will automatically be filled in, but may be revised.

Sales, Purchasing and Inventory

- The new **Due Date** column, in the **Follow-up** tab of the **Sales Orders** form, allows you to record a due date for the entire order that will automatically be assigned to any newly recorded order items.
- The new **SProjNegOrd** logistic constant determines whether to take orders with negative quantities into account when calculating project profitability.
- Additions to the **Sales Opportunity Rep. Generator:** the projected dates for completing various stages in the sales process.
- New columns in the **Sales Order Report Generator** include **Sales Rep Order Num**., **Shipment Code**, **Shipping Method** and **Budget Item**.
- In the **Price Lists** form, you can now define a price list as **Not in Use,** so it will no longer appear in Choose lists.

- Dual-currency users: The new **VAT Number-Cus**t. column in the **Sales Orders** form allows you to record the number of the customer's company as recognized by VAT authorities in the order, which will then be automatically copied to invoices linked to the order.
- You can record the **Packing Crate No**. and **Crate Type Code** in the **Itemized Quotation** sub-level of the **Price Quotation for Customers** and **Vendor Price Quotation** forms.
- You can define the number of days it usually takes the vendor to supply a part in the **Supply Days** column of the **Parts per Vendor** form.
- You can use the **Blanket Purch Order** and **Line-Blanket Order** columns, which were added to **the Order Items form** (sub-level of the **Purchase Orders** form), to link each line in the purchase order to a different blanket order.
- The **Order Type** column, added to the **Vendors** form, allows you to record a default order type that will appear automatically in any purchase order recorded to this vendor.
- When recording a GRV, you can now record the received part's serial stamp.
- The new **Set Text for GRVs** form allows you to define text that will appear in GRV printouts. In addition, new value was added to th**e PCopyPOrdTxt** logistic constant that determines what text will be copied into GRVs that are based on purchase orders which already include remarks.
- The new **Set Text for Warehouse Transfers** form allows you to define text that will appear in warehouse transfer documents and printouts.
- You can set a variable conversion ratio for buy/sell units required in certain documents without generating a change in quantities in factory units in the document (similar to the variable conversion ratio flag for parts). Do so by flagging the **Variable Conversion** column for the pair of units in the **Unit Conversions** form.

Field Sales (Mobile Application)

- When recording a document for returned goods, the field sales rep can now specify the customer site where the return took place.

Field Service (Mobile Application)

- The field technician can now record whether to charge the customer for the labor and parts used in the service call.
- When reporting labor and parts for a service call, the field technician can force a discount of 0%, which will be used instead of the system's discount hierarchy.
- The field technician can now record the servicing package relevant to the service call.

Miscellaneous

- The **Not in Use** column was added to the **Customer Groups** and **Secondary Customer Groups** forms. Flagging this column will prevent the customer groups from appearing in Choose lists.
- The new **Task Report Generator**, in the **Customer Relations Management** menu, allows you to design and run reports on tasks.
- Authorizers for purchase orders, purchase demands, special budgets and project planning versions can be flagged as not in use.
- The **Extended Price** column was added to the following documents: price quotes, vendor invoices, debit memos, pro forma invoices and shipping documents.
- The new **Kits Issued to Work Orders** report displays the items in a kit list that have already been issued for production of selected work orders.
- You can use the **Overall History of Changes** report to view changes that were made to a variety of entities (e.g., parts, contacts, tasks).

System Maintenance and SDK

- A new **Forgot password** message in the login screen assists users in restoring forgotten passwords via an e-mail link.
- Improvements to the **Task Scheduler:**
    - Definition of tasks and their scheduling from within a **Priority** form, even in the Windows interface.
    - The task file is automatically updated from the form, and it's no longer necessary to run an update program.
    - New options for defining frequency of tasks.
    - E-mail notifications can be sent to designated users at the beginning/end of the tasks.
    - You can define multiple companies in which to run the task.
    - For a program requiring user input, you can designate the user from which the input is to be taken.
    - A new report displays the tasks that are defined to be run by the Task Scheduler.
- The **Privileges per Group Leader** report can now be run for individual menus or even specific forms, reports and programs.
- The new **Compare User Priv Btw Companies** report allows you to view the privileges of a group of users in several companies.

- When using the **Copy Queries** program, you can now copy queries to multiple users at once.
- You can now limit the **BPM Flow Chart Rules** report to active rules.
- New programs for copying rules in the system:
  - The **Copy Business Rules and Data Gen** program allows you to copy business rules and data generator rules from one user to another.
  - The new **Switch Users in BPM Flow Chart** program allows you to revise BPM rules, changing one user to another.
- The new **EXCELBLANKCELL** system constant allows you to define how to copy empty cells from Excel worksheets to **Priority** in the Windows interface.
- The new **PerfMonitoring** system constant determines whether or not to send performance data from **Priority Rich** to the performance monitoring server.
- **Priority** now supports the REST API, a software architecture style used to develop applications and programs that interface with **Priority**. To work with REST you must purchase a license.

International Tax Authorities

- Portugal: The **Digital Signatures** program can be run from the list of Direct Activations from various forms (e.g., **Revision of Invoice Details**).
- Mexico: The **Upload Financial Data to SAT** program was upgraded according to local tax requirements.