Priority Release Notes v22.0

Contents

User Interface

- **First steps in Priority** - To accompany you in your first steps in setting up a new company, we created an onboarding process. The process will help customize the workspace to better fit your organization's needs. Upon entering Priority, we will assist you in setting up your initial data, like company details and bank account information, and then move on to a short questionnaire, an automated system configuration based on your business needs.

    – This is relevant for new Priority Zoom customers in Israel.

Welcome to Priority

Congratulations on your decision to take your business to the next level.
In the next few steps, we'll ask a few questions, and write down some details, in order to tailor the system to your specific needs.

Later   Let's go >

- **Your workspace, set up just for you**

  Using new smart technology, we are now going to recommend ways to help you design your *Priority* workspace, according to your specific usage, in order to automate and customize the system for you. Every so often we will give you suggestions for personalizing your workspace according to your specific needs.

  – **Homepage** - One of the main advantages of the homepage is that you can save shortcuts to your most frequently used forms, programs, and reports. Now we can help you better organize your homepage to enhance your daily work experience.

  – **Form layout (subforms and actions)** – Every once in a while, we will show you smart recommendations. For example, we will suggest to take certain actions that you frequently use, and show them directly on your forms as easy-access buttons. Also, for example, if there are subforms you don't use, we will recommend automatically hiding them for you.
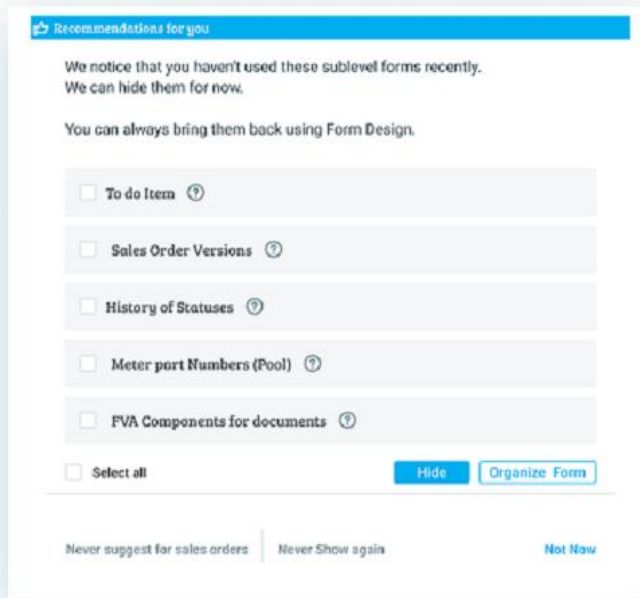
– All these suggestions and recommendations can be hidden and/or canceled.

– These suggestions will give Priority cloud customers a customized and personalized user experience. Design recommendations will take effect gradually.

- **Automations Hub** - *Priority* provides many tools to help make your work more effective. For instance, the ability to set up automated and/or recurring tasks.

    We conveniently organized these tools under one icon, the **Automations Hub**, accessible from every form.
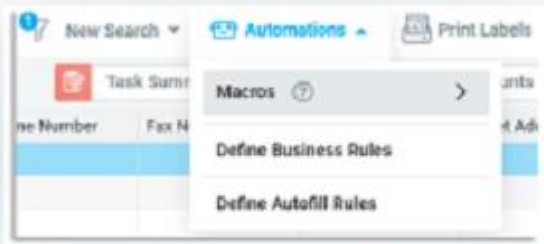
- **Macros** - In the **Automations Hub**, you can find the macros you've always used, now significantly more intuitive with an upgrade in functionality.

  - Set up a macro for recurring tasks, and choose to repeat the same task a number of times, with the new experience we created for recursive macros.

  - When you want to automate a recurring, cross-form task, for example, create an automation that opens customer shipments for multiple sales orders, use macros.
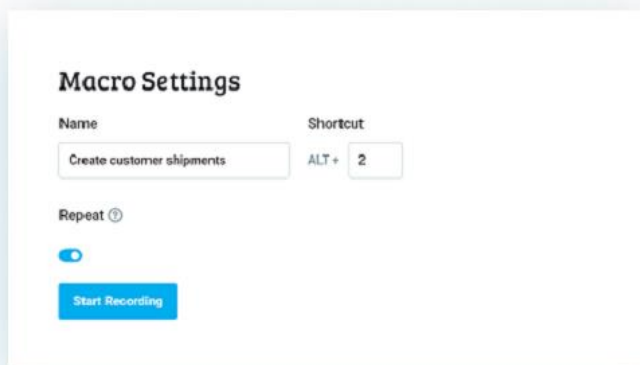
- Define **Business Rules** and Define **Autofill Rules** are now also under the **Automations Hub**, (moved from Form Settings).

- Supported in the Web interface, only.

- **Generating reports from the menu** - When running a report from the menu or the homepage, you will now receive a new customized dialog. The new dialog will have

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the same functionality you have always had. For example, you will now find saved reports under the designated button at the bottom of the dialog.

A detailed explanation of running reports can be found in the User Interface Guide.
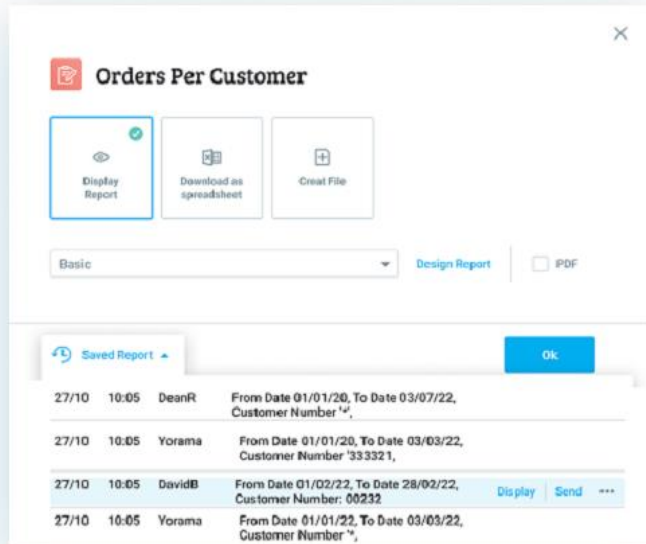
- **Find your records with a quick copy/paste** - When you need to search for a number of records, like sales order, document, part or customer numbers, you can now copy the list of numbers from a spreadsheet and paste them into the search dialog using Filters or the Advanced Search tool. We will find the records for you, streamlining your search for several records simultaneously.
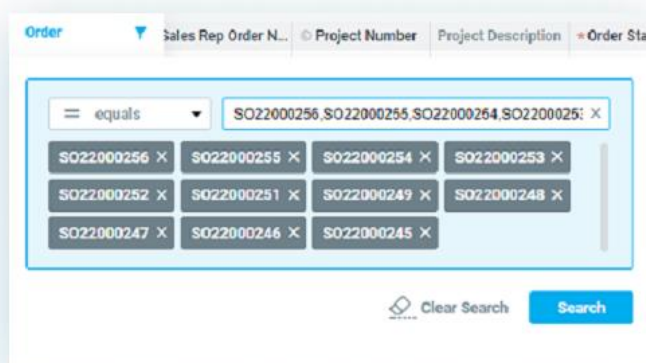
- **Adding to search results** - While running a saved search on a form with search results, you can now add the new search results to the already displayed records.
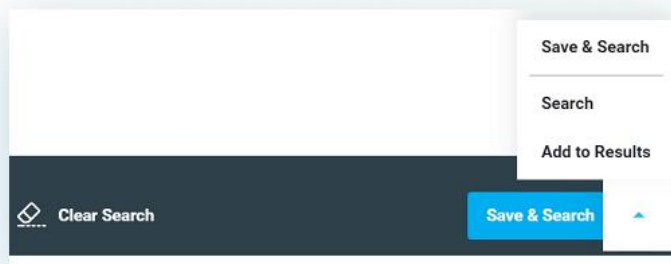
- **Search using case sensitivity** - When searching with filters or with Advanced Search, the search will now include results with uppercase and lowercase letters. You can cancel this option by clearing the relevant checkbox.

Priority Mobile

- **See the bigger picture -** We added an easier way to zoom in on product images when looking through the parts list. Just tap the magnifying glass icon on the picture of the image.
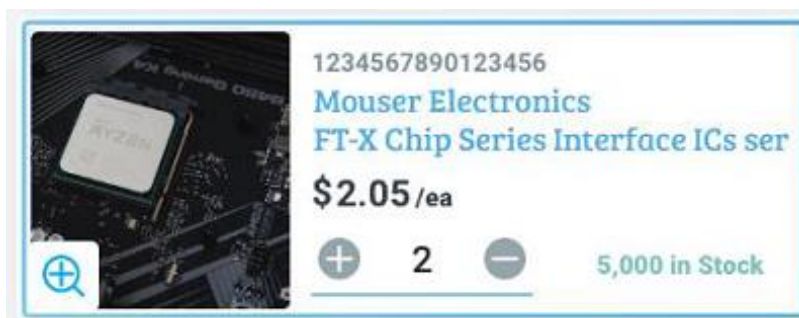
- **Updated look in Mobile -**

    – We added a way for you to quickly identify sum totals in documents while scrolling through document lists, or while viewing documents one at a time.

    – Under the highlighted sum field, you can easily view a summary of the sum total of all the documents in the list.

        - In the app generator, define the documents in which you want the Sum field to be highlighted.

        - This field is highlighted automatically in predefined apps.

    – Select a customer, vendor, or part using only one field. We merged the **Name** and **Description** fields for these types of fields.

    – Document dates also received a new design and customization.
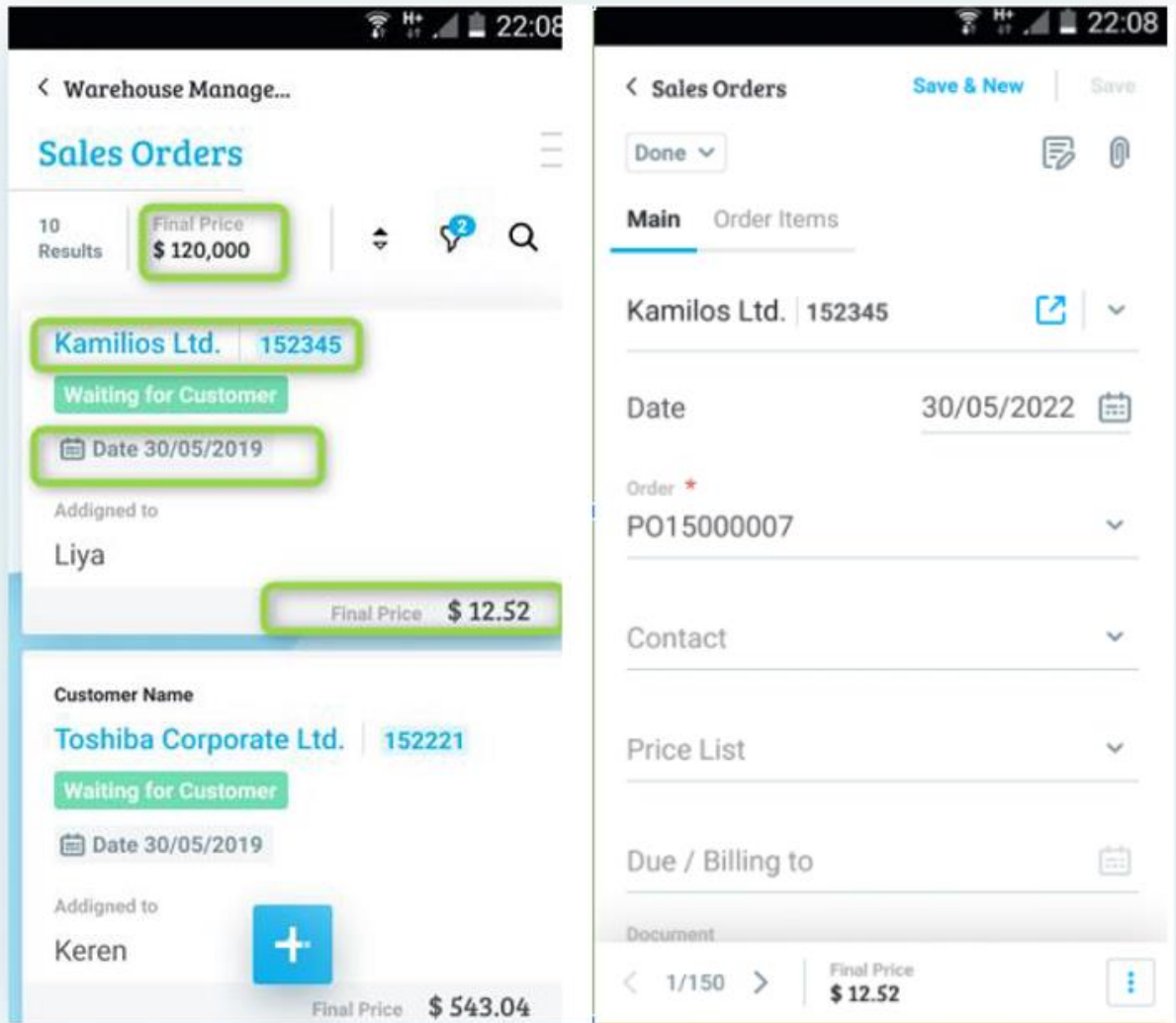
- **Sending emails to contacts -** When sharing or sending a document, you can now choose the **Quick Email** option to send the document directly to the relevant contact using their information in Priority.

Financials

Reconciliations

- **Split Reconciliation Work Areas -** Split reconciliation work areas provide a new and effective reconciliation experience. We invite our customers to use this new reconciliation experience on bank, account, and credit card reconciliations.
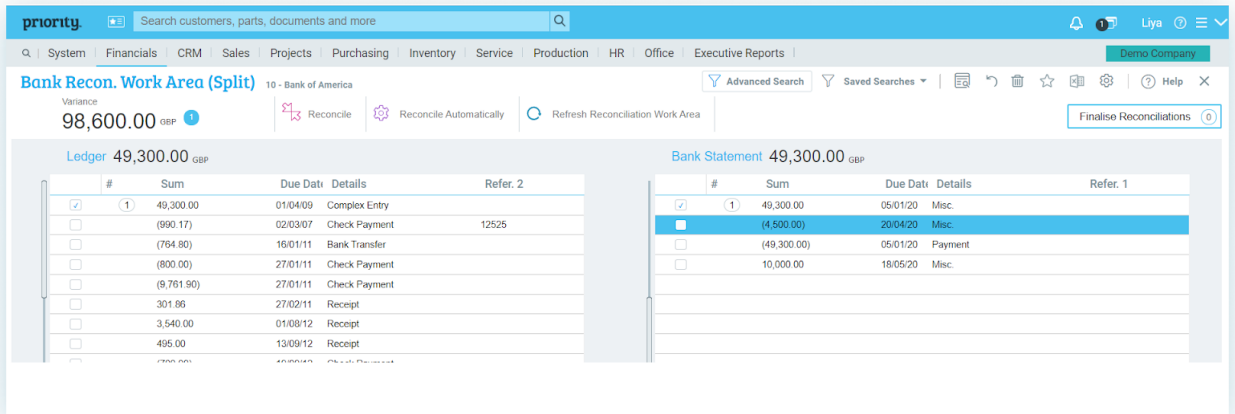
To learn more about working with split reconciliation work areas, see the SOP.

- **One-sided reconciliations -** A one-sided reconciliation is a reconciliation in which one or more lines on one side of the split reconciliation work area are selected and the balance is moved to a target account. We enhanced the one-sided reconciliation experience, making it easier for you to fill in the required definitions that are necessary in order to complete the reconciliation.

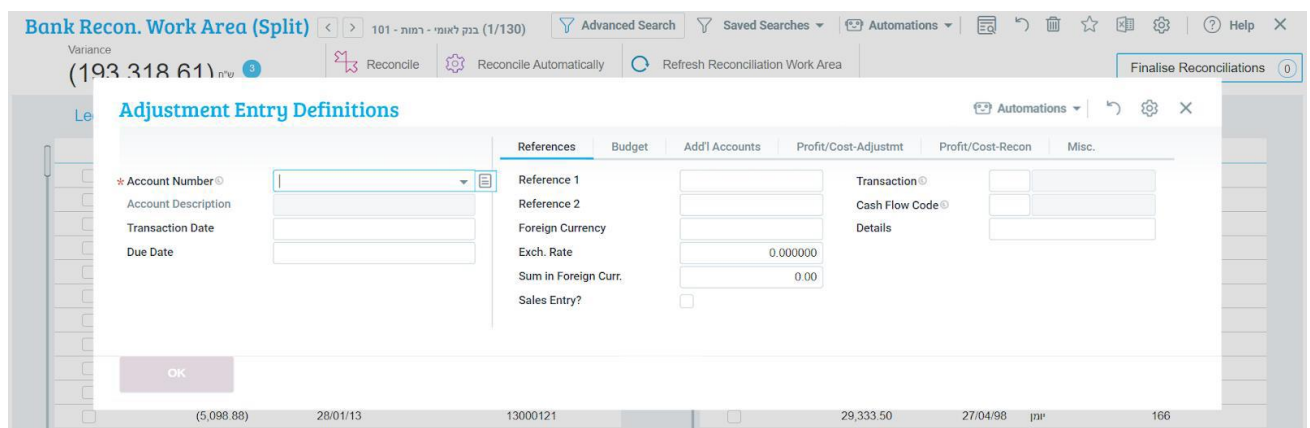We fine-tuned the logic of the one-sided reconciliation so that each definition you enter in the **Adjustment Entry Definitions** form will be carried over to the reconciliation transaction (e.g., dates and references), and each field left empty will be filled in according to the original transaction.

- **Bank reconciliations from bank statements -** We added support for standing order payments to vendors, in which payments will not be prepared for the vendors in the regular way. Instead, when recording a bank statement line, you can specify the vendor that you sent the payment to, and select the invoices for which the payment was taken. As a result, the system will automatically record the payment, the invoice will be reconciled, as well as the bank line. Similarly, you can choose a primary account and the system will automatically create a reconciliation transaction and reconcile it with the bank statement. This is in addition to what we already offer; the capability to reconcile customer invoices and create receipts. This workflow is

designed for companies that want to close a bank statement and create entry transactions simultaneously, without using the reconciliation worksheets. * *We will release this development after the version release, and will send an update accordingly.*

- **Multi-Company Reconciliations -** When working in a multi-company setup, given that these companies sell and purchase from one another, you can use the bank reconciliation solution to reconcile ledger accounts between the companies. With this new feature, you will be able to make an automatic upload of the bank statements from the related company.

- **Reconciliation Details Report -** You can now generate a report from a reconciled bank line in order to view the details of the reconciliation.

- **Reconciliation Coloring -** We changed the rule for coloring strong recommendations for bank reconciliations. The system will now suggest reconciliations in which the reference in the bank statement matches Reference 2 in the ledger.

- **Renaming of Prepare for Reconciliation programs -** For a more precise distinction between the two **Prepare for Reconciliation** programs, we renamed the programs. To prepare for account reconciliation, use the **Account Reconciliation Prep** program. To prepare for bank and credit card reconciliations use the **Bank/CreditC Reconciliation Prep** program.

Revenue Recognition

We updated the revenue recognition module with the following:

- You can now set various recognition components per each document line when setting up fair value on the document level.
- We added support for defining an unbilled receivables account, with the same hierarchy that we supported for a deferred income account. When the revenue is recognized before the billing, the journal will post to the unbilled receivables account. Also, we added the option to define deferred and unbilled accounts on the level of both customer type and account family type combination.
- When working with revenue recognition by progress of completion, we added support for an expiry date in contract obligations. When the date passes, the system will automatically recognize 100% of the obligation. This can be useful when recognizing revenue for professional services with a limited usage period.

Read more about the Revenue Recognition module in the SOP.

Priority Payments
- **Payments with Click2Pay from sales orders and quotes -** You can now collect payments for sales orders and quotes through Click2Pay. The printout of the order will include a Pay Now button that will redirect the end customer to the familiar payment page. After payment, the system will create a receipt for the order. In the case of a payment for a quote, the system will create both an order and a receipt.

- **New means of payment -** For the European market we now support payment with SEPA, and for the British market, BACS.

  – Due to these new means of payment, we changed the name of the **Update ACH Trans. Confirmations** program to **Update Trans. Confirmations**, in order to better describe the program's functionality.

Budget

- **Dimensional analysis in budget BI reports -** To allow a more comprehensive analysis of budgets using the BI report, we added more dimensions: account, cost center (of account), profit and loss.

- **Controls on budget financial constants for multi-company budget-** We added a set of controls, in order to prevent errors when defining constants while working with a multi-company budget.

- **Budget usage calculation for deferred expenses -** We changed the way budget control works in respect to deferred expense invoices. Now the budget control will consider the line amount divided into term periods and the corresponding appropriation. If the term goes into another year, the system will work based on the budget version for the relevant year. * *We will release this development after the version release, and will send an update accordingly.*

General

- **Choose a bank account for a bank transfer receipt -** You can now choose a bank account for a bank transfer receipt, even if there is a cashier code in the upper-level form. Use the **Other Forms of Payment** sublevel form, and you won't be receiving any more error messages in this scenario.

- **Purchase Tax Fixed Sum -** We added new support for defining purchase tax as a sum instead of only as a percentage. This is only relevant for manufacturers, as tax is already included on import for resellers.

- **Meter Module -** We added support for meter readings for multiple periods, and support for payments of minimum pulses. For more information, see the SOP.

- **Rounding cash receipts -** We added a new financial constant, **CashRecRound**, allowing you to define the amount to which to round cash receipts. For example, you can choose to round to the nearest multiple of five cents, ten cents, a dollar, etc. When you finalize an over-the-counter invoice with a cash receipt, the system will verify that the amount received is rounded according to the definitions set in the constant. The difference between the received cash and the total to be received cannot go over half the amount defined in the constant.

- **Automatic transfer of opening balances when recording entries for previous year -** When you record a journal entry for the previous year, it is no longer required to manually run the transfer of an opening balance. Opening balances of the accounts involved in the transfer will be updated automatically in the current year.

- **New aging report** - We added the **Aging by 30-Day Period per Rep** report to the system.

- **Monthly depreciation calculation for fixed assets -** We added a new financial constant (**AssetDeprByMonth**), in which you can set a monthly depreciation calculation, in addition to the already existing option of a daily calculation.

- **Recording a journal entry for a pro forma invoice -** From now on, a journal will always be recorded for a pro forma invoice, independent of the **ProFormaBasis** constant (cash-based accounting).

Designated Solutions for the International Market

Global

- **Basic Data synchronization -** We now support basic data in multiple languages for a single territory, so you can choose the language in which you want to receive the basic data, for the company you open. For example, a customer in Belgium can choose to receive the basic data in Dutch or in French. Basic data includes banks, tax codes, accounts, types of journal entries, etc. In order to receive the basic data in a specific language, you must log in to the system in that language before opening the company in the system.

  In addition, you can translate basic data in an existing company to the language of the current user interface as long as it is a language supported by Priority. For example, if a company was opened in Belgium in Dutch, the system administrator can later choose to translate the basic data to French.

- **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 feature was extended to Over-the-Counter invoices. Learn more about this solution in the SOP.

Shipping with ShipEngine

We added new abilities to the ShipEngine module, which manages communication with different shipping companies (UPS, FedEx, etc.), to receive shipping price quotations and book shipments directly from the system.

- **Settings for shipping charges -** When creating a shipping document for a shipment via ShipEngine (using the **Ship by ShipEngine** program):

  - The system can automatically identify who to charge for the shipment, (according to document or customer definitions), so you don't need to manually select it. This is relevant for running the program in shipping mode.

  - The system can add a shipping charge line to the document according to the party paying for the shipment. (The line is added if the company is being charged, and not added if the customer or a third party is being charged.)

- **Creating a manifest -** Certain shipping companies require you to independently create a manifest as a PDF file. Now you can create the file in *Priority* by running the **Create Manifest** program.

- **Shipping labels -** You can define a generic name to go on the ShipEngine shipping/return labels, e.g., Shipping Department, instead of the name of the user who generated the labels.

Learn more about this solution in the SOP.

North America
- Avalara -

    – Support reporting to Avalara in non-dollar currency.

    – Support importing line-detailed VAT calculations from Avalara.

- Canada

    – We customized the printout format for Canada to include the PST/GST tax on the invoice line, summary per tax type, and a global summary.

Europe
- We added support for working with prepayment invoices in case of sales with multiple VAT rates, as is generally the case in Europe.

- We now store detailed VAT reports in the VAT transmission log, so that you can generate the detailed reports later on, in case of an audit.

- When the **SeqPurNum** constant value is set to 1, vendor invoices will be numbered according to the VAT report date, and not by the invoice date.

Italy
- When you generate invoices for a customer abroad, who has a local VAT representative, you can now assign the representative to the customer, and their information will be detailed in the electronic invoice.

- We customized the structure of electronic invoices for end customers outside of Italy so that the invoice in foreign currency will be translated to Euros, according to regulation.

- If a vendor sends an e-invoice without a PDF attachment, Priority will create a simulation of a comprehensive, printed copy of the invoice based on the data in the XML.

Belgium
- We now support 2-digit Intrastat codes.

- Now you can receive business health information for customers and vendors, such as turnover, margins, check if the business is in the process of bankruptcy, and

more. All of this information can be located from the **Customers** or **Vendors** forms, and first requires signing up with Companyweb.

- We added support for loading a digital vendor invoice based on an XML file.

Portugal
- We added support for the new regulation:

    – Print a QR code on sales invoices, shipping documents, and receipts.

    – Support for approved sequences for financial documents and printing ATCUD.

- Our system now supports the management of a full account tree as well as a chart of accounts and its representation in the SAFT files, according to regulations. See more information in the SOP.

- We're now allowing to define shipping documents as documents that can have a temporary numeration, just like invoices. Select the designated checkbox, and once the document is finalized it will receive its final number, and can no longer be changed. It will also be signed at this point. For more information, see the SOP.

France
- We now support 2-digit Intrastat codes.

- We added the ability to export Intrastat XML files for reporting to the tax authorities.


Lists of Authorizers

We invite our customers to get to know Priority's solution for working with authorizer lists.

Authorization list management for documents has been part of the system for a while, (e.g. purchase orders and purchase demands authorization), and now we added new functionality to this existing solution. We unified the authorization process among all types of documents, and we now support working with authorization lists for additional documents.

By managing authorization lists in the system:

- You can create different types of authorization lists for each document, in which each list has its own settings (authorizers, currency, order of authorization, etc.).

- The round of authorization will start as soon as the document is assigned the designated status, according to the status settings and the **NewAppList** logistics constant.

- **Authorize and Decline Documents -**

    – **Authorize or decline directly from your email -** When a document is ready for your authorization, you receive an email. One quick tap on Authorize or Decline in the email records your answer in the system. * *We will release this development after the version release, and will send an update accordingly.*

- Authorize or decline using Actions (from the list of actions for the documents), and, of course, by selecting the **Authorized** checkbox from the sublevel forms, as usual.

- If you decline a document, the reason for declining will be recorded automatically in the system, in the **Reason for Decline** sublevel form.

- This solution is now also available for price quotations, sales orders, and Engineering Change Orders.
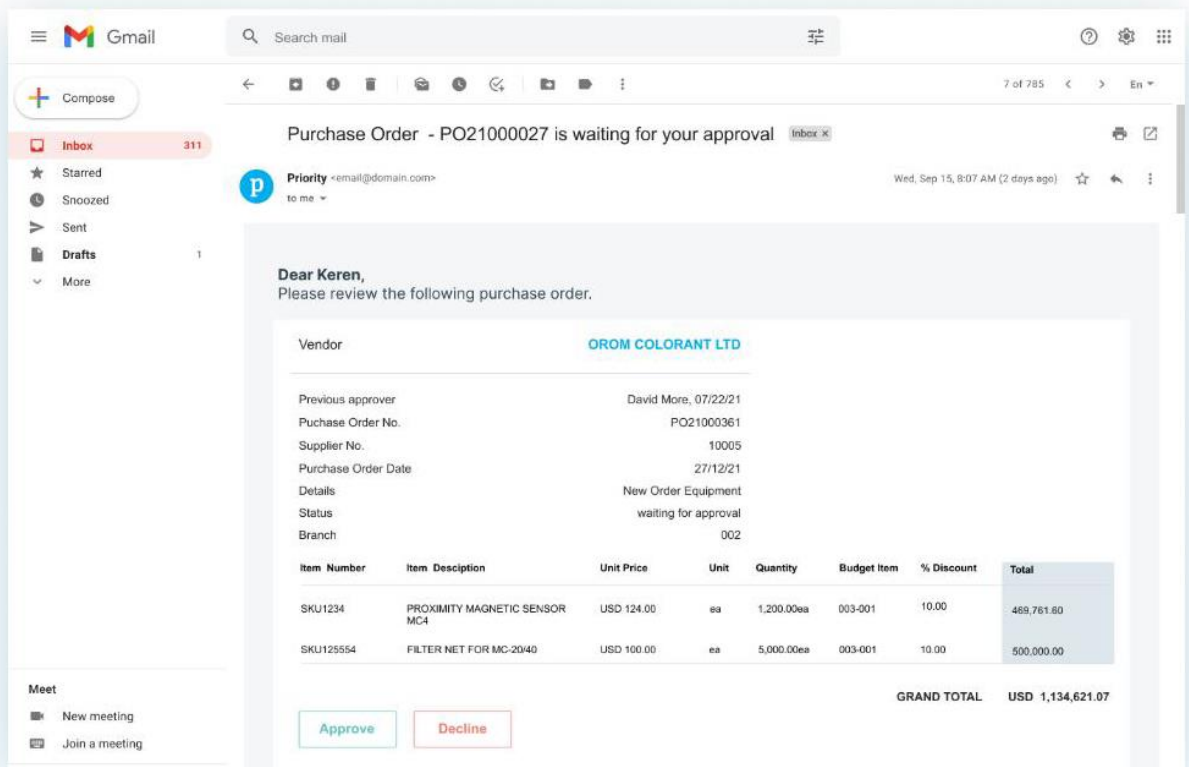
Find more information about Priority's document authorization process in the SOP.

Supply Chain Management

Inventory

Serial Numbers
- **Multi-company serial number management -** For organizations that work with the same serial numbers within multiple companies, we added the possibility to view the data and history of the serial numbers across companies, and each company can update the serialized components of parts. For more information, see the SOP.

- You can locate serial numbers within all companies using the new **Multi-Co. Serial Number Location** form.

- **Inventory transaction control for serial numbers -** For companies that need to tighten control on inventory transactions of serial numbers, we added a new option to the ISerialTrans constant; (its new description is **Controls on opening/updating serial nos**). The system will block the user from performing inventory transactions that do not match up with the serial number registration in the system; (up until now the system would just warn the user before the action, but wouldn't block the user.)

  - In order to allow different constant values to different groups of users, we added a new sublevel form, **Logistic Constant per Group/User**, to the **Logistic Constants** form. Using this sublevel, you can, for example, define value **2** for an entire company (blocking), and the system administrator value **1**, (warning without blocking). Therefore, the administrator can make changes if necessary.

Learn more about *Priority's* serial number management in the SOP.

Warehouse Management System (WMS)
- *Temporarily blocked bins -* To help you address temporarily unavailable warehouse bins, we added the **Blocked Bin** checkbox in the **Bins in Warehouse** sublevel of the **Warehouses** form. If you select the checkbox, the system will show a warning if there is an attempt to initiate a warehouse task that includes the blocked bin.

Sales

Availability

We added some new options to the **Part Availability** forms in the system:

- When calculating part availability, you can now take blanket sales orders, blanket purchase orders, and service calls into account, (using a new status definition for documents).

- You can now define that documents in certain statuses will not be taken into account when calculating part availability. (For example, ignore sales orders in 'draft' status.)

- If you work with branches, you can track the part availability in each branch in the **Part Availability by Branch** form.

Sales Rep Commissions
- **Sales rep commissions for parts -** Now you can define commission percentages per part, for sales reps, (in addition to defining commissions for sales reps, customers, and part families).

- **Tiered commissions for sales reps -** For each area in which you can define sales rep commissions, you can also define commission tiers. For example, you can define

that a sales rep will receive 5% commission, and for a document line starting from at least $10,000, the commission will jump to 7%.

- **Summary of Sales Rep Commission Definitions report -** Use this new report to view commission definitions for each sales rep whether according to customer, sales rep, part family, or part.

Read more about sales rep commission management in the SOP.

Rentals

The **Rentals** Module, in which companies can rent out equipment to end users and bill according to rental periods, has been upgraded with new capabilities:

- Companies renting out non-serialized items can now view the availability of rental items using the new **Rent Item Avail. (w/o SerialNos)** report. This new report is an addition to the already existing Gantt chart and designated form for checking availability of serialized rental parts.

- Companies renting out equipment and receiving partial returns at unexpected dates, can now intake the returned parts using the **Choose Items to Return** form, a sublevel of the **Rentals** form, and the rental itemization will automatically be updated accordingly.

To learn more about Priority's rental solution, see the SOP.

MRP

- **MRP planning according to service calls -** Industrial and commercial companies that administer servicing processes can now plan MRP according to service calls, without recording a sales order. Accordingly, quantities of planned servicing parts will also deduct from forecast quantities.

    – Therefore, we changed the relevant form names to better describe their new functionality:

        - Orders/SvcCalls Related to Issue

        - Orders/SvcCall for PR/Purch Ord

Preventative Maintenance

The maintenance module has been updated with two new options:

- **Seasonal Maintenance -** For periods in which servicing serialized parts is unnecessary, you can now define months in which maintenance will be skipped. For example, if a serialized part has a set maintenance "wash" every month, you can set in advance to skip this servicing over the rainy season.

- **Routine servicing according to skill -** You can now define technicians who are responsible for handling planned maintenance of a given servicing type. These technicians will be assigned automatically to service calls with this servicing type that are opened when preparing a servicing plan.

Read more about the maintenance module in the SOP.

System Maintenance
- **MDM privileges -** To improve control over data distributed between companies, we added a new privilege to the Privilege Explorer: **MDM Restricted** (only for those working with the Data Distribution module). Using the **Manage Priv. for Interface Rec.** program, (from the **Data Exchange Definitions** form), you can limit users from making changes in selected fields of records that were received via the MDM distribution.

- The **History of Changes** sublevel was added to the following forms:

  - Cashiers
  - Credit Card Accounts
  - Bank Accounts
  - Reconciliation Defs-Custs/Vends
  - Company Credit Cards o Engineering Change Orders (ECO)
  - Sales Reps
  - For the **Part Catalogue** and **Customers** forms - the **History of Changes** sublevel will now include sales rep commission.

- **Define New User for Application program -** Using this new program, you can add users that will be used for Priority Payments and interfaces of external systems that connect to Priority, such as those available in Priority Market. The program creates a user, and assigns the user to the correct application license with the permissions they need for the application.

  The program is not meant for creating users for Click2Sign, Priority Mobile, or the Priority Timesheet application.

- **Add new users program -** To improve the process of adding a new user, by using this program and updating the user's email, you can now define the type of email: internal, external, or both.

- **External ID -** Customers that use the **External ID Mgmt.** module can now define an external ID as part of the application server installation.

- **Azure Active Directory ID -** Checks will be implemented to ease the transition.

- **Priority Connect -** The **Sign Up for Priority Connect** program name in the **Companies** form was changed to **Register with Priority Connect** to more accurately represent its purpose – registering to create an external unique identifier

for Priority's cloud service for a specific company. This identifier will appear in all links produced for this company (such as payment of invoices via a link).

Developer Tools

- **Business rules and Autofill Rules in a Trace file -** A trace file that is created for a form will now show business rules and autofill rules that failed.

- We added support for generating a QR code based on the content of a file (and not only on report column text).

- When creating new printout templates, you can now include them in the version revision files.

- **REST API**

    – You can now receive the Priority version number through an API call.

    – **Clearing Metadata in REST API -** For Priority Software cloud installations only, after private development in forms, you can update the REST API with the new fields by sending a request to a specific ENDPOINT.

- The Developer Portal now includes the Priority SDK.

- **Zapier integration -** You can now build Zaps based on a workflow from the **Sales Orders**, **Purchase Orders**, and **Contacts** forms in Priority, and then continue the flow into a third-party system. This is based on Priority's Webhooks technology, automatically activated from Zapier. For more information, see the SOP.

- **Shortcut to open a form in the form generator -** When working in a form, you can use the shortcut key **CTRL+Q** to open the form in the form generator. The form opens in the generator, the same way you are able to open forms from the menu by using F6.