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Release Notes *Priority* 15

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General

- ***Priority***'s web-enabled user interface is now powered by Microsoft's Silverlight platform rather than WPF. This change will eventually provide support for running ***Priority*** on different web browsers (e.g., Mozilla Firefox and Google Chrome), as well as other operating systems that support Silverlight.
- Improvements to Enterprise Search:
  - New interface looks more like standard Internet search engines, making the search process more efficient and intuitive to users.
  - Search can be performed with advanced search criteria.
- Forms and reports that are used in the HTML interface (MarketGate) have been redesigned for display on mobile devices such as the iPhone, iPad and Android devices, including the ability to view and update the following types of system records:
  - CRM data (e.g., leads, sales opportunities, customers, contacts, price quotes)
  - Sales orders
  - Tasks
  - Service calls
  - Purchase demands (PRs)
  - Purchase orders
  - Project reports
  - Calendar & appointments
  - Work hour & absence reports
- New **Field Sales Management** module allows sales representatives who work outside of the office to access system data from their mobile devices (on- or off-line). This module enables reps to view and update the following types of system records: price quotes, sales orders, tasks, receipts, customers and contacts.
- New **Field Service Management** module allows customer service representatives who work outside of the office to access system data from their mobile devices (on- or off-line).
- New **Preventive Maintenance** module enables you to prepare servicing plans for routine maintenance, thereby automatically scheduling future service calls for designated parts.

- New ***Priority*** component, **Synchronize with Priority**, runs within MS-Outlook and provides integrated synchronization tools (requires Office 2007 or higher):
  - Right-click any message in Outlook and select **Synchronize with Priority** to choose the customer and assigned user for the task to be opened for that message, and whether to import the message as an open or closed task. Choose lists in this dialog box are populated with the corresponding ***Priority*** data.
  - The above fields can be viewed directly from Outlook's Messages pane (by adding them as user-defined fields) and used to group or sort messages.
  - Messages can be marked for synchronization as tasks or as service calls.
  - Messages that have been successfully synchronized are automatically flagged as such.
  - These user-defined fields can be used to define Outlook messages even when working in Offline mode (e.g., while traveling, with no access to the organization's network or to ***Priority***).
    - The new component is activated by running the new **Update Data for Synch w/Outlook** program from within ***Priority***.
- Improvements to BI reports (formerly referred to as OLAP reports):
  - Support for multi-dimensional display format, enabling you to drill down and view different cross-sections of data in a single screen, organized within a hierarchical tree.
  - You can specify a range of dates, using relative start and end dates (e.g., start of last month, end of this quarter).
- New **Time & Attendance** and **Payroll** systems allow you to collect time and attendance information, manage employee overtime, track accrual leave balances, manage any additional employee earnings and deductions and produce employee pay slips.
- Create and manage discussions that involve multiple participants. Use the **Tasks** form to define a subject and assign the relevant participants or participant groups. Use the **Notes** sub-level form to hold the discussion. Each participant who updates the discussion can inform other participants of this change by selecting the **Send Link to Participants** command from the upper **Mail** menu.

Finance

- New checks and limits for financial documents:
  - You can prevent users from finalizing a document if they were the last one to update its status or assigned user.
  - New **CreditCardOK** financial constant allows you to determine whether receipts involving payment by credit card can be finalized without first checking for credit card authorization.
- Can maintain a history of the cashier's closing balance on prior closing dates.
- New reports for use when financial data is maintained per customer rather than per account (i.e., the value of the **IdentCustAcc** financial constant is set to 3):
  - **Aging by Customer Number**
  - **Balance by Cust Number-TransCurr**
- The following reports can now be run for past dates:
  - **Aged Receivables by Invoice**
  - Dual-currency users: **Unreconciled Entries-Trans Curr**
  - Dual-currency users: **Trial Balance in Transactn Curr**
- New **Manual Entry** column in the **Entry Journal** form. This column is flagged automatically for journal entries that were recorded manually.
- Can record **Bank Account Details** for multiple bank accounts associated with a single A/P, A/R or GL account.
- New single-level forms allow you to retrieve all changes made to multiple customer or vendor bank accounts simultaneously.
- Improvements to bank loans: Can define interest calculations on a monthly rather than a daily basis for loans with fixed principal payments.
- New BPM for bank loans and leasing transactions.
- New single-level form for viewing special budget appropriations.

Dual Currency Users:

- Support for VAT reports required by German tax authorities.
- Digital signatures added to individual invoice items (as required in
- Portugal).
- When canceling a payment or receipt for which an exchange rate adjustment entry was automatically recorded, that entry is canceled automatically as well.
- Define an alternate currency to be used to adjust exchange rates for foreign-currency accounts (if the second currency isn't used).
- When exchange rate adjustments are recorded for multi-currency accounts, can create a single adjustment entry per currency (summary entry).
- New **Details of Tax Prepayments** report.
- When copying a journal entry, can use the exchange rate in effect on the new reference date.
- Can define a debit memo to vendors as a credit. This is used to record a self-billing invoice.

Marketing and Sales

- Improvements to sales opportunities:
  - Can record a **Price List Code** that will be used to price all parts recorded in the opportunity.
  - Can flag an opportunity as **PriceList Parts Only** to restrict the parts that can be recorded in the opportunity to those in the designated price list.
  - Can record an additional sales rep for the customer for a given opportunity.
  - Can assign a **Sales Opp Type**.
  - Can assign an **Add'l Sales Opp Type**.
  - Can define the relevant source in the new **Source of Opp** column.
  - Can record the **Manager's Estimate** of the potential sale's monetary value.
  - Can define the **Reason for Failure**.
  - Projected date columns added to the **Parts in Sales Opportunity** sub-level form.
  - Can copy a sales opportunity directly from the **Sales Opportunities** form.
  - New **SOppClosePct** logistic constant determines which sales opportunities are taken into account when calculating sales forecasts and estimated target compliance (opportunities whose odds of closing are equal to or greater than the designated percentage).
  - New **Open Sales** Opportunities sub-level added to the **Part Catalogue** form.
  - New single-level form for viewing **Details of Open Sales Opps**.
- New terminology for forecasts and targets:
  - "Order target" refers to what was formerly called an order-based sales forecasts.
  - "Sales target" refers to what was formerly called an invoice-based sales forecast.

- "Sales forecast" refer to the current estimate of total sales. For example, a sales forecast for a given year includes: customer invoices recorded that year, shipments that are due to be delivered by the end of the year but have yet to be billed, open order items whose due date falls before the end of the year and sales opportunities that are likely to succeed by the end of the year.
- Estimated compliance with a sales target is evaluated based on the corresponding sales forecast.
- Estimated compliance with an order target is evaluated based on existing sales orders recorded during the designated period, as well as sales opportunities that are likely to succeed by the end of that period.
- Actual compliance with a sales target is evaluated based on actual sales invoices only.
- Actual compliance with an order target is evaluated based on actual sales orders only.

- New report compares target compliance this year with compliance during the same period last year.
- New **Sales Targets**, **Order Targets** and **Sales Forecasts** web parts added to the **Sales Manager Dashboard**.
- Can define a check list for orders of a given sales type. Tasks are opened automatically based on the check list whenever that sales type is assigned to a sales order. Each of these tasks must be completed before the order can be approved for shipment.
- Can define sub-tasks that are performed as part of a single "main task".
  - Create a check list for a given task code. Sub-tasks are opened automatically based on the check list whenever that task code is assigned to a task.
  - The **Task List** sub-level of the **Tasks** form can be used to define sub-tasks manually and to view any sub-tasks that were opened automatically, based on the check list.
  - All sub-tasks must be completed before the main task can be flagged as **Done**.

- New task status attributes:
  - Allow users to change attachments for final tasks with this status.
  - Prevent users from deleting tasks with this status.
- **Campaign Code** column added to the **Tasks** form.
- New sub-level of the **Marketing Campaigns** form allows you to view and/or update **Tasks for the Campaign**.
- **Internal Dialogue** sub-level added to the **Sales Orders** and **Price Quotations for Customers** forms. This text form is used to record comments that are meant for internal use only.
- **Site** column added to the **Blanket Sales Orders** form.
- New **Shipment Remarks for Customer** sub-level added to the **Customers** form. Remarks are copied automatically into customer shipments.
- New **Packing Slips in Invoice** sub-level added to the **Sales Invoices** form. Invoices can be itemized automatically based on the contents of the packed crates.
- Can view all return documents recorded against a given shipping document in the **Return Documents** form, a new sub-level of the **Customer Shipments** form.
- Can print all shipping documents and sales invoices scheduled for delivery in a given round and route.
- New **InvForClosedOrd** financial constant enables the inclusion of closed order items in a multi-shipment invoice that is based on a sales order.
- Can maintain price lists for the base product only (rather than maintaining separate prices for each linked part), based on the value of the new **IPricePolicy** logistic constant, if the base product's price policy is '01' (same price for all parts linked to base product).
- Can define a hierarchical organizational chart for customers, based on the positions held by customer contacts.
- Can assign a priority to price lists in the **Customer Price Lists** sub-level of the **Customers** form. This value determines the price list to be used when the customer places an order.
- Can run a program to delete a price list directly from the **Price Lists** form.

Customer Service

- New **CreditServCalls** financial constant determines whether you can record a service call after the customer's credit limit is exceeded.
- **Internal Dialogue** sub-level added to the **Service Calls** form.

Purchasing

- New **Vendors per Part** report. Can also use the report to find all parts that are not associated with any vendor.
- New **Reason** column added to **Purchase Demands** form.
- New **To Work Order** column added to **Itemized Purchase Requisitions** sub-level of the **Purchase Demands** form.
- Can split purchase requisitions (even in an authorized purchase demand) directly from the **Itemized Purchase Requisitions** sub-level of the **Purchase Demands** form.
- Can split order items (even in an authorized purchase order) directly from the **Order Items** sub-level of the **Purchase Orders** form.

Warehouse Management System (WMS)

- New **WMS Lite** module supports the use of mobile devices when working with warehouse tasks, without providing system recommendations for these tasks. Warehouse employees can use a mobile device to open and/or report to a warehouse task.
- New **WMS Pick** module supports the creation of pick waves.
- New **WMS Production** module supports the creation of waves of the following types of tasks: issues to kit, issue of supplies, bulk issues to floor and bulk issues to subcontractor.
- Two additional supplementary modules are currently scheduled for the next release: **WMS Service** (for waves of issues to service calls) and **WMS Production** (for waves of issues to assembly documents).
- Can create a pick wave based on orders that are scheduled for delivery in a given round and route.
- Can create a pick wave for an order directly from the **Sales Orders** form.

- Can create packing slips and shipping documents as part of a single streamlined process.
- New warehouse task type: "Double Check". Tasks of this type are used to review picked crates before they are shipped.
- Can open a new pallet directly from a mobile device.
- Can update the truck number and shipper directly from a mobile device.
- When reporting from a mobile device, can specify the number of crates in addition to the quantity.
- New **Warehouse Tasks** web part added to the **Inventory Manager Dashboard**.

Inventory Control

- Can indicate a pallet number for a serialized part in the **Catalogue of Parts w/Serial Nos.** form.
- New **lVolumeCoef** logistic constant enables you to define a coefficient that is used to calculate volume. For example, if length, width and height are measured in centimeters and volume is measured in cubic meters, set a value of 1,000,000.
- New parameter allows you to restrict inventory reports to inventory-controlled parts only.
- **Value Description** column added to **Permitted Values for Part Spec** forms. Permitted values can also be linked to a part family, such that Choose lists will be populated based on the relevant part family.
- New report: **Parts Opened in Period**.
- New status attribute for malfunction documents: **Status Once Auth'd**. The status with this attribute is assigned automatically when the last board member authorizes the board's decision.

User Interface

- Label Generator - Can generate and print labels using data taken from designated form columns. The **Label Generator** can then be run directly from the relevant form (from the upper **Design** menu in the Windows interface or from the upper **Run** menu in the web-enabled interface).
- Can view certain documents produced within the system in PDF format.
- When designing a report or document, can define a given field as not allowing a line break.
- Can copy links to attached files by right-clicking the relevant column icon.
- Can create a record link that can be sent to customers and accessed externally via the MarketGate interface.
- Can create a link to Google Maps from address columns in forms (from the upper **Tools** menu in the Windows interface or from the upper **Run** menu in the web-enabled interface).
- Can click an address in a report to view the address using Google Maps. This feature is also supported on the iPhone and iPad.
- New feature in Choose lists displays your text when you begin typing a desired value.
- New keyboard shortcuts:
  - **Ctrl+Alt+R** - Run Enterprise search
  - **Ctrl+Alt+E** - Search for entity (form, report, program)
  - **Ctrl+Alt+T** - Access To Do list
  - **Ctrl+Alt+F** - Organize fields
  - **Ctrl+Alt+I** - Import file
  - **Ctrl+Alt+O** - Synchronize with Outlook (from web-enabled user interface only)
  - **Space key** (in blank column) - Opens a Choose or Search list or a calendar.

System Management

- Improvements to user privileges - Can assign users to different privilege groups in different companies, as follows:
  - Create privilege groups for various types of operations or "profiles" (e.g., warehouse, sales and accounting operations) and assign each group the privileges required to perform the relevant operations in all companies.
  - Assign each user to different privilege groups when working in different companies (e.g., a given user may have both "accounting" and "sales" privileges when working in Company A, but only "sales" privileges in Company B).
  - When logging in to the system and selecting a company, users select the profile with which they wish to work.
- Users that do not belong to the system manager privilege group can be assigned various system maintenance permissions, such as:
  - managing users (e.g., adding users to the system or changing another user's password)
  - managing companies (e.g., adding or deleting companies)
  - managing privileges
  - running upgrades.
- Can view a history of login and logout times per user and workstation.
- Can view a history of error and/or warning messages received by each user when working in forms.
- New form: **List of BPM Rules**.
- Users must be authorized to download form data in order to sum up values in a column.
- New checks and limits for working in the HTML interface (MarketGate) - Can now set up an internal (Intranet) server for company employees only, which provides a high degree of access to company data, and a separate Internet server for customer and vendor contacts, which provides more limited access to company data.

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Miscellaneous

- Improvements to the File Explorer:
  - Navigation permission - enables users to view sub-folders, but not files, within a given folder.
  - Can lock individual files for editing and/or viewing.
- Can add a digital signature to PDF documents in order to send documents electronically.
- Can add set text to documents that are sent using the **Automatic Mail** and **Automatic Fax** options.
- Support for Internet Explorer 9.
- Support for 64-bit versions of MS-Outlook.
- Signature, time stamp and file size columns added to various attachment forms.
- **History of Changes** sub-level added to various system forms.