

Priority Release Notes v23.0

Version 23.0 includes many new releases, among them:

- Multi-view mode for mobile - unique workflows fit to your business needs
- New WMS capabilities, including the WMS mobile app
- New and advanced payment means for Priority Payments

Easily identify the following tags in this document:

- **Customer Request** Releases developed due to requests of customers
- **New Behavior** Releases that have changed behavior in the system and are immediately applied with the upgrade

Contents

User Interface

Priority Mobile

Financials

Designated Solutions for the International Market

Perpetual Inventory

Supply Chain Management

Sales

Rentals

Warehouse Management (WMS)

Inventory Management

MRP

System Maintenance


Developer Tools

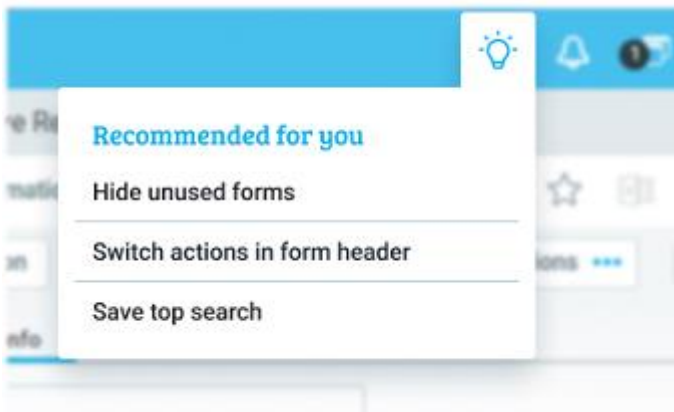
User Interface

Your workspace, set up just for you

We are happy to announce another stage of workspace personalization fit to your needs.

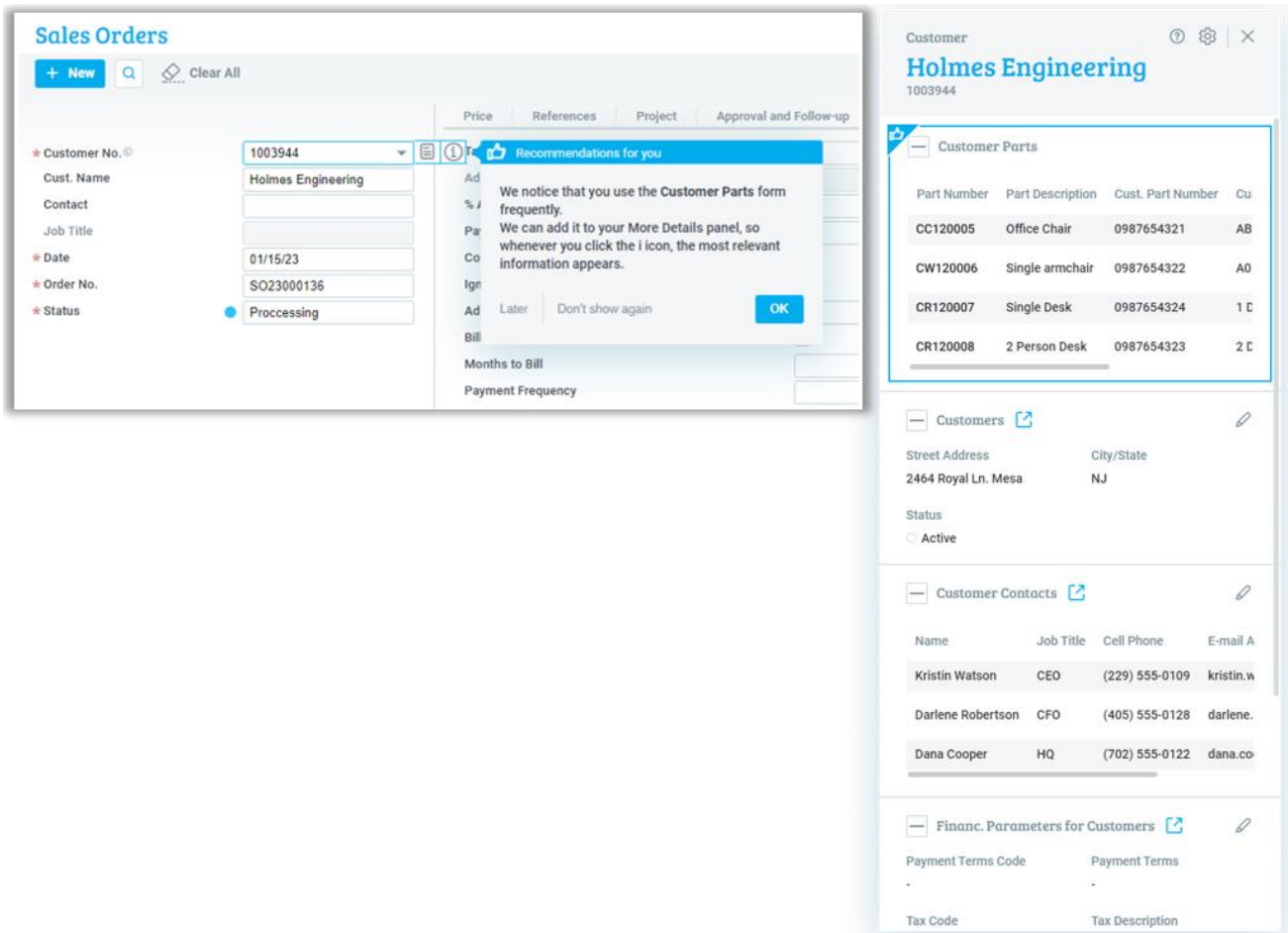
- **Personalization Center** - Let us personalize the system for your unique needs, at the right time for you.

Click on the  icon from the Priority header to see intelligent insights for personalizing your system at your convenience. The Personalization Center will show recommendations that you have not yet responded to, according to form.



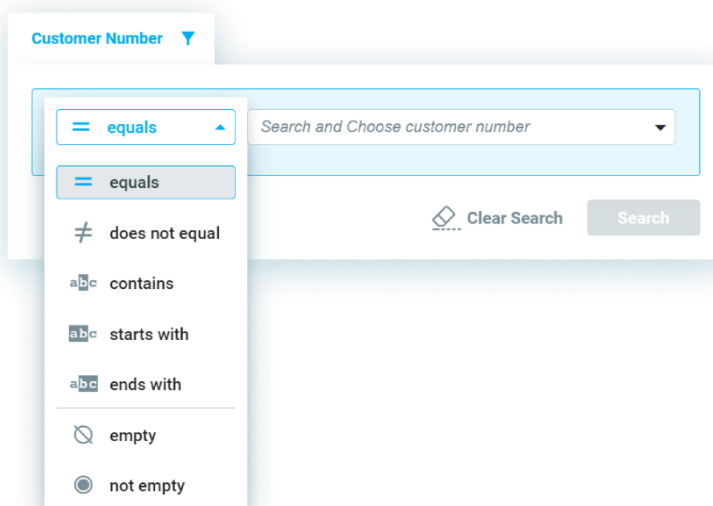
- **Personalization: More Details Side Panel**

Now you will receive smart recommendations based on AI insights, for personalizing content in the More Details side panel; the panel that opens when you click on the **i** icon from different fields in the system, based on your personal use. For example, let's say that when opening a sales order, you want more details about the customer parts. You will receive a recommendation to add the information to the side panel. That way, you can immediately view information important to you, cutting out longer navigation through the system for the information. In addition, under the Settings icon, you can choose forms to add on your own, based on those most useful to you.

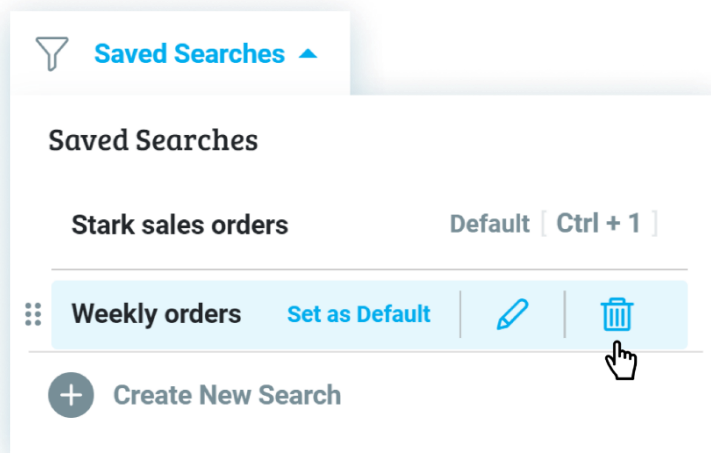


Searches

- **Search by empty and not empty fields** – Simplify your search using the **empty** fields and **not empty** fields (instead of a NULL or * search), in the advanced search and in search filters.



- **Delete saved searches** – Delete saved searches easily from the list of Saved Searches with just a click on the Delete icon that appears when you hover with the mouse.



General

- **Search Business and Autofill Rules** – Search the Business and Autofill rules by entering any detail in the new search window.
- **Rule numbers in messages** – When a message originating from BPM or Business Rules pops up, you will now see the BPM or Business Rule number in the message title, helping you identify the source of the warning or error.

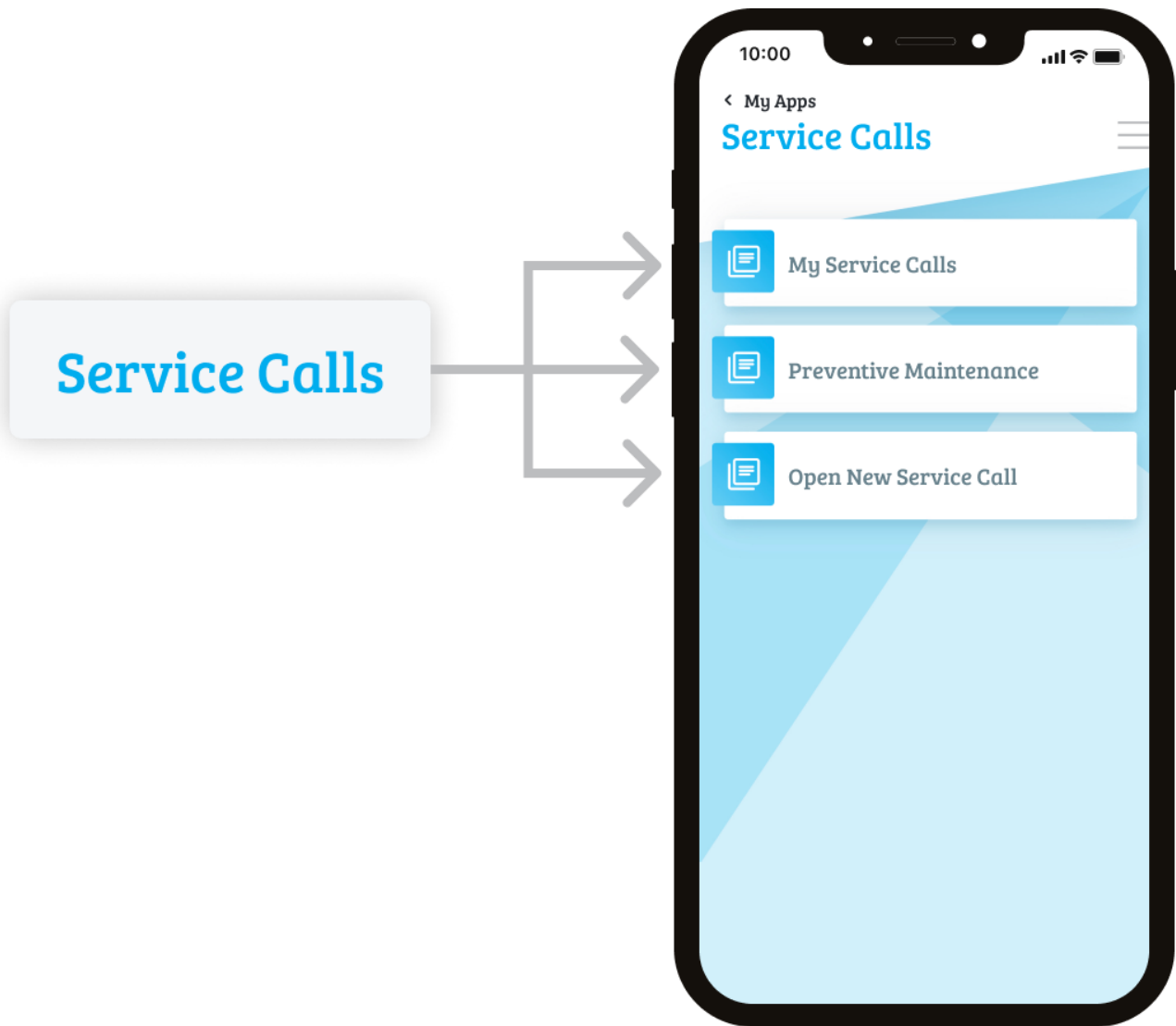
Terminology Updates New Terminology

To better fit their functionalities, we made some updates:

- The **Attendance Contracts** form is now called **Employment Contracts**.
- The **Linkage Details** subform is now called **Currency Linkage**.
- The **Payroll Component Definitions** subform is now **Attendance Component Definitions**.

Priority Mobile

Multi-view mode fit to meet your business needs



Create unique workflows in one app, fit for your organization’s work process with advanced Premium abilities

Let’s say your technician is servicing a malfunction by a customer. Now the technician can update the service in a designated area in the application: **My Service Calls**. There, technicians see their daily tasks and update servicing details for service calls (e.g., spare parts and working hours). While the technician is working, they see that the preventive maintenance period passed, so in another area of the same application, designated for **Preventive Maintenance**, the technician updates the service maintenance done, including documenting the checks, calibration, and more. If necessary, the technician can also **Open a New Service Call** in another area of the application. All these actions easily performed in one single application according to your organization’s unique work process. No need for moving between views, searches, and different fields. Your field employees can keep the focus on their tasks and less on navigating through the application. These new capabilities are possible due to significant advancements in the application generator. We encourage you to use them for any work processes your organization needs for jobs in the field (e.g., sales and purchasing).

What do we offer you?

- **Use the same Priority form multiple times in the same app** - each time with a different set of definitions:
 - **Integrate** different fields, subforms, actions, and reports for each time the form appears, according to your user's needs in the field.
 - **Personalize** the data available for each user to view, according to a **predefined search**, including an option to limit data available to view (more on this below).
 - **Name** each form differently according to its purpose.
 - **Name** fields uniquely to clarify their functionality in the current work process, (unrelated to renaming fields in Form Design in the desktop version).
- New Behavior**
- **Saved Searches** -
 - **Define data to view in forms** – For example, define that each technician can only view service calls in an open status, for the current workday, assigned to them. In the Application Generator, create a designated saved search for a form in the application. Choose **which data** users will see in the form and limit users so they can **only** view this data. (In this case, the search options are hidden in the application.)
 - **Define a search by current user** – Create one saved search that shows each user all their relevant documents, with just one search definition. By defining a search for the current user (**Me**), you can define, for example, that upon entry to the **Service Calls** form in the application, each user will see the calls assigned to them. This search relieves you of the need to define different search conditions for each user separately.

- Saved searches for mobile only** – Now you can save designated searches for your mobile app based on your needs in the field, different than the saved searches you use when you work in the office. Do this by defining a saved search from the Application Generator, as explained above, or by saving searches defined by users while they are working in the application.

From now on, changes created when you save a new search or edit an existing search in the desktop will not appear in the app, and vice versa. **New Behavior**

For more information about these new options for creating applications using the Application Generator, see the [SOP](#).

*These abilities are included in the Premium application generator package, and are not available in the basic application generator.

- More Languages for You** - We expanded the scope of languages, so now you can work in German, French, Italian, and Romanian, in addition to the preexisting languages: English, Flemish, and Hebrew.

Financials

Reconciliations

- **Add remarks to reconciliations** – When updating definitions for an adjustment entry, you can write journal entry details at length, by clicking on the new icon next to the form title.



- **VAT report date** - We added a new column, **VAT Report Date**, to both sides of the account reconciliation work area.
- **Record an adjustment entry in a closed fiscal period** - Using the new **PostReconPeriod** financial constant, you can decide whether an adjustment entry recorded in a closed fiscal period will be recorded for the closed period (if you are authorized to work in such period), or if it will be recorded for the closest open fiscal period.
- **Reconcile pro forma invoice variance** - Now you can reconcile variance automatically on the pro forma side of the ledger, by selecting the **Auto Recon Variance** checkbox in the input of the **Add Line for Variance** program found in the Actions list of the **Receipts** form.


Priority Payments

- **Partial payment** - Now you can pay partial payments of the invoice amount with a credit card (or with a digital wallet) in Click2Pay, and in the payment portal.



Customer Request

Payment For **Bamboo Furniture**

My Open Invoices (22) Payments Made (7)

<input type="checkbox"/>	Invoice	Pay By Date	Details	Amount	To Pay
<input checked="" type="checkbox"/>	SI236000449	02/08/2023		292.50 USD	150.00 USD 
<input type="checkbox"/>	SI236000444	02/07/2023		88.92 USD	-
<input type="checkbox"/>	SI236000422	02/06/2023		112.00 USD	-
<input type="checkbox"/>	SI236000421	02/06/2023		14.04 USD	-
<input type="checkbox"/>	SI236000420	02/06/2023		28.08 USD	-

Total 150.00 USD

Card Number:  1111 Expiry Date: 11/24 

Continue

Change Payment Method

- **Apple Pay** - We now support Apple Pay as an additional means of payment in our Click2Pay and Payment Portal experiences.
- **Data Level 2/3 for credit card transactions** - We added a new financial constant, **SendDataLevel23**, so you can now control whether to transmit data level 2/3 along with your credit card transactions.
- **Clearing with physical payment terminals** – For users in Israel, we are proud to announce payment clearing with physical devices, added to our Priority Payments clearing solution. This option is designed for businesses that meet the customer face to face, use Priority as the user interface in the register, and are interested in adding a clearing terminal.
 - Register for POS (Point of Sale) payment methods directly from within Priority.
 - Order payment terminals directly from within Priority, from the variety offered.
 - Perform transactions and credits from within Priority using the terminal.
- **Direct debit bank payments** – Users in Israel can now:

- Set up a direct debit from within Priority or allow the end user themselves from within the payment portal
- Send receipts for clearing using the direct debit token (similar to the existing process for direct debit with credit card).

Note: This does not include a single-payment bank transfer payment; this is only available for direct debit.

For more information about Priority Payments, see the [SOP](#).

Revenue Recognition

- **Mixed Mode Fair Value Allocation** – Now you can set the Fair Value Allocation for contract obligations that are broken down into recognition components themselves. For example, you can have the system automatically allocate fair value for a contract obligation line like software licenses, and afterwards divide the same fair value to other static components, like 75% license and 25% maintenance.

Customer Request

- **BCO (Balance Carry Over)** - Now you can define parts as BCO. When a BCO part is added to a contract obligation with a customer, it will not be included in the general calculation of the Fair Value Allocation, and will be recognized at its nominal value according to the record in the contract obligation.

For more information, see the Revenue Recognition [SOP](#).

General

- **Realized Exchange Gains / Losses** - We added support for recording realized gain or loss as a result of exchange rate adjustments. For more information, see the [SOP](#).
- **Import vendor invoices** - As part of the digitalization of the Accounts Payable process, more and more organizations are using a wide array of solutions for digitally importing vendor invoices. To allow for proper import, especially for vendor invoices with very long invoice numbers, (e.g., Amazon), we expanded the character limit on a variety of fields in the system that need to store this data, to 48 characters.

Customer Request

- **Certified copies** - Now when you generate a certified copy of an invoice using the **Create Certified Copy** and **Create Add'l Certified Copy** programs, the invoice will be generated with the respective titles: “Certified Copy” and “Additional Certified Copy”. **Customer Request** **New Behavior**

- **Partially recognized purchase tax** - You can now define partially recognized purchase tax by expense type per purchase account, and by setting the recognition percentage per expense type. For example, you can define that car expenses will only be 50% tax deductible.

- **Withholding tax types** - Withholding tax types are now defined in the new **Withholding Tax Types** form. Add new tax types as you need.
- **Marking invoices for payment** - We added the option to ignore credit balances, such as credits or payments, in the **Flag Invoices for Payment** program.
Customer Request
- **The VAT Report Type** field in the **Company Data** and **Subsidiaries** form is now updated with drop-down lists. Instead of a static, predefined drop-down list, it contains a list of values from the new **VAT Report Type** form. For companies working in territories supported by Priority Software, this form comes set up with values. You can update the form with report types independently, too.
- You can now define a percentage of customer tax withholding on the company/subsidiary level, so when manually generating receipts in the system, the percentage of tax withholding will be set according to this default.
Customer Request
- In the **Monthly Profit & Loss (Table)** report, you can now also choose a specific account.
Customer Request
- We added support for the continuous numbering of checks for check printing, also when recording a cancelled check.

Designated Solutions for the International Market

Global

- **International Shipping-**

The ShipEngine module, which manages communication with multiple shipping companies, (UPS, FedEx, etc.), to receive shipping price quotations and book shipments directly from the system, has new capabilities:

- Define return labels to be printed according to the customer or customer site, like you already can for the carrier.
- Print return labels even after creating shipping labels.
- Decide to make a fixed return address, different than the address of the shipping warehouse.
Customer Request

For more information see the ShipEngine [SOP](#).

North America

United States

- **Sales Tax** – Use our most updated solution for working with sales tax, using the Avalara integration. This solution makes the tax calculations most accurate by considering the sender's address, the recipient's address, and the types of products shipped, according to their different tax rates.

As of February 28, 2023, we will no longer support working with updating tax rates for Sales Tax using the Update Tax Codes program.

New Behavior

Canada

- We added support for displaying tax in purchase order printouts, divided into separate PST and GST sections, as required in Canada.

Europe

- **VAT report by boxes in secondary currency** - We added an option to generate VAT report by boxes in secondary currency. For example, a company located in England that works in Sterling, does business in France, and must report VAT in France, can now generate the report in their secondary currency, the Euro, for the same company for the French branch. See the [SOP](#) for more details.
- You can now import bank statements in the QFX and OFX formats.

United Kingdom

- **Digital banking** - Now you can make payments to vendors by means of digital banking (3 Days Bacs Payments).

Directly from within Priority, you can:

- Send a digital payment (Bacs) as an action from the transfer,
- Transfer several payments simultaneously
- Receive an update regarding the status of the transfer.

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

Italy

- **Stamp duty** - We added support for Stamp Duty. The new financial constant, **StampDutyFrom**, will define tax liability threshold, and the structure of the electronic invoice updates accordingly.
- **Exemption reason** - We added the ability to define an exemption reason (Natura), according to exemption reason codes. This way we now support sales invoices that include exempt parts, with different exemption reasons.
- **Reload vendor invoice** - We added an action to the **Electronic Invoices Log** that allows for reloading an invoice after fixing errors found in the original invoice load. For example, you tried to load an invoice and received an error that the vendor does

not exist because the vendor was not opened yet in the system. After the vendor is opened in the system you can reload the invoice successfully.

- **Intrastat** - Now Intrastat will also include services in addition to goods.

Belgium

- **Remarks for tax codes** - We added support for tax code remarks, which will appear on each sales invoice printout. This is especially useful for exempt tax codes and remarks written for regulatory purposes, that explain the exemption reason.

Portugal

- **Angola** - We added support for printing three copies of an invoice; the original, a first copy (duplicado), and a second copy (triplicado), as required by regulations.

Israel

Financials

- **Merkava portal** – Digital signatures from Priority are now authorized by the Finance Ministry, allowing our customers to submit invoices to government offices through the Merkava portal.
- **Digital banking with Bank Leumi** – As a continuation to the change made in Bank Leumi for bank transfer error details for both foreign currency and Israeli currency, now you can easily identify and understand any errors, as they are separated according to bank transfer in the Send history log.
- **Preparation of files 1000 and Mivzak** - We conducted the necessary updates due to the changes in file structure for the “Mivzak” and 1000 systems, for reporting withholding tax, that came into effect in January 2023.

Payroll

- **Tax and benefits breakdown** - We added a pay slip breakdown for taxable benefits to pension funds. You can see the calculation itemization in the new **Benefits - Employer Contribution** form. Similarly, we added a tax calculation breakdown which you can see in the **Tax Gross Up** form, a subform of **Monthly Attendance Timesheets > Earnings and Deductions**.
- **Eligibility data per employee** - Now when you enter the **Eligibility-Vacation & Sick Days** form, the default information will fill in according to the employee data and you can update them per employee.
- **Vacation and sick days report** – This report now includes the convalescence day balance, so we updated the report name to **Vacation/Sick/Convalescence Days**.
New Terminology
- **Credit point calculation as part of salary calculation** - Now you do not need to manually calculate credit points, as it is done as part of the salary generating process. **Customer Request**

- **Earnings and Deductions Table report** - We added a cross-sectional itemized report per payroll component, that allows you to see all employees per payroll component paid to them. **Customer Request**
- **Regulation Updates** -
 - We updated Priority’s digital Form 101 according to income tax authority requirements. Now you can add required attachments while filling in the form. Checks were added for data precision, and processes were updated for after an employee fills in the form, such as administrator approval.
 - We updated File 126 for Palestinian Authority employees, and we added Category 92, according to regulation requirements.
 - We updated the severance calculation for hourly workers, to be calculated for the entire employment period, and not just for the last 12 months, according to regulation requirements.
 - We added support for extending the validity of credit points for children under the age of 12, as per regulation requirements.
 - We updated Form 100 and 102 as per regulation requirements.
 - We updated the accrued vacation days calculation by 200/240 days in a full/partial year, so now it will also include paid sick days.

Perpetual Inventory

- **Set fixed standard cost per part** - We added the option to fix a standard cost per manufactured part without the costing program recalculating it. This is especially useful for manufacturing companies in the United States interested in fixing a part cost at the beginning of the year. **Customer Request**
- **Journal entries for documents** - We added the **P. Inv Transactions for Document** form, that shows the itemization of the journal entries recorded for the specific inventory document, as a subform to additional upper-level forms, (such as Packing Slip, Issue of Supplies, and more).
- **Controls on inventory account usage** - We added controls to prevent the usage of inventory accounts that participate in perpetual inventory calculation, for other purposes, that could interfere with their balance, in which case they would not match the inventory value.
- **Recording expense items in multi-GRV invoices** – When you record expense items in a multi-GRV invoice, if the company works with Perpetual Inventory the debit account will be **Purchase Not Yet Billed** (the account is linked in the **Default Accounts** form), and that way the account will be balanced correctly when it will be credited at the stage of receiving the goods from the vendor. **New Behavior**

- We added a new check in the **Part Catalogue** to prevent errors when changing the status of the **Inventory Control** checkbox when recording perpetual inventory.

For more information on Perpetual Inventory, see the [SOP](#).

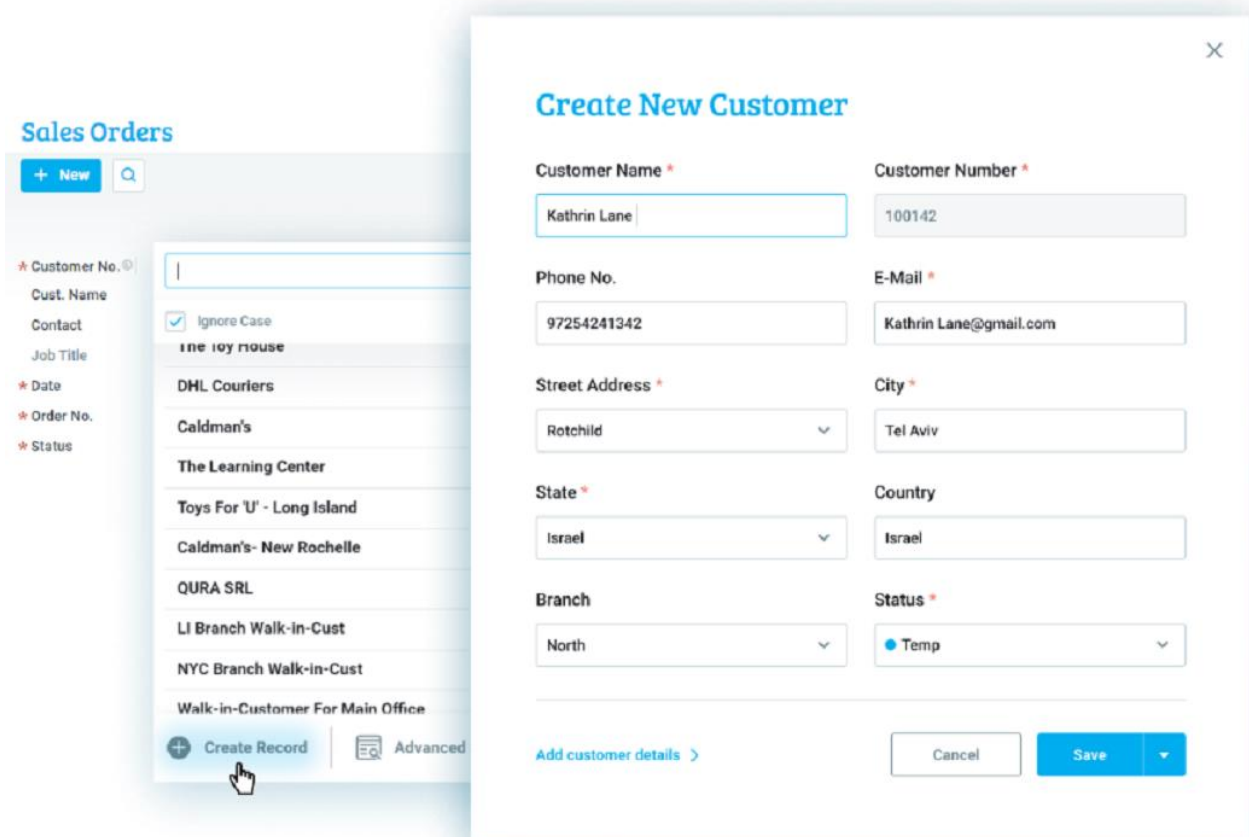
Supply Chain Management

General

- **Definitions for copying remarks** - Now you can control the remarks that appear in the different documents, the order in which they appear, the priority of the remarks, and more. For example, you can choose for sales orders which text forms will be entered for the order, and how they will be entered, from the possible text forms (Price Quotations, Customers, Types of Sales, etc.). This is all done in the new **Definitions for Copying Remarks** form. See the [SOP](#) for more details.
- **Checklists for parts, customers, and vendors** - Now you can manage checklists for new parts, customers, and vendors, similar to price quotation and sales order checklists. For more information, see the [SOP](#). [Customer Request](#)

Sales

- **Quick customer setup during the sales process** – Now you can open a new customer directly in the document without having to open the **Customers** form. Use this option in your sales orders, price quotations, and invoices. Click the **Customer** field in any document, select the **Create Record** button, and the **Create New Customer** pop-up window opens. Fill in your customer's details, like name and address, and you've opened a new customer. Customer details will be saved in the **Customers** form.



- Now when you make a change to sales rep commissions, the history of changes will be updated in Sales Orders and Price Quotations. **Customer Request**

Rentals

- **Update daily rental rate** - To support unexpected changes in prices, you can now update the daily rental price for rentals defined by daily rate only during an active rental period.

Warehouse Management System (WMS)

- **Configurable put strategy** - You can now independently define the way in which the put strategy works. Like the pick algorithm, personalize the storage algorithm. Use the **Put Strategies** form.
- **Prevent shared storage of part families** - You can now define which part families will not be stored together with other part families. For example, in the case of parts that would be dangerous to store with other parts. Use the **Part Families** form.
- **New possibilities for pick strategies** -
 - We added a new pick strategy: **Pallet designated to supply the order line before the pallets not linked to the current order line**

- We added new options for pick strategies in the **Pick Strategies** form, allowing you to choose allocated inventory for the customer only, work orders with part revisions of order lines only, and linked pallets to an order line, only.
- **WMS for mobile** - From version 23.0, the Application Generator is part of the WMS module and does not require a separate installation. In addition, we added these new capabilities:
 - **Predefined applications** – We invite you to use predefined, ready-to-use applications, in addition to the preexisting capability to build personalized applications for your organization in the WMS Application Generator.
 - **Default warehouses** - When working on a task in the mobile device, the warehouse will appear automatically according to the new option to make a default per task type and user.
 - **Open a quick task from the mobile device** – You can define that when opening a new task, the user will go directly to the reporting area without having to go through the stage of opening a new task.
 - **View summarized pick results for parts** – When you pick the same part many times separately, you can view summarized results of the picking according to part number at the end of the pick, in addition to the existing detailed view.
 - **Create new serial numbers** - Now you can create new serial numbers which working in the mobile device.
 - **Shortcuts to reports** - Added reports to the application tiles, in addition to the existing option of adding them to the side menu.
 - **Expanded support for GS1 Standard** – We added support for GS1 to reports and programs, in addition to the already existing form fields.

For more information about the WMS Application Generator, see the [SOP](#).

- **Printing documents for mobile** - We added support for document printing from the mobile device, by means of sending an email directly to the printer. Use the new **Define Email Address for Printer** form to define the email address for each printer. (Available to Cloud customers)

Inventory Management

- **Store Warehouse Management Application** - Using this new store warehouse management application, you can now enjoy a fast and mobile work process, from your application. Use the application to receive inventory in your store, move inventory from branch to branch, and more.

Matrix Items (Fashion)

As we expand the usage of our item management, on a two-dimensional matrix basis, (i.e., color and size), for different verticals beyond the world of fashion (e.g., optical), we updated titles in our module to best fit the needs of different organizations.

Due to these changes, the **Fashion Maintenance** menu has changed to **Matrix Item Maintenance**, and the **Inventory Transactions (Fashion)** menu has changed to **Matrix Inventory Transactions**. Entities designated for colors in the world of fashion are now designated for attributes for matrix items, according to the needs of the user. For example, the **Colors (Fashion)** form has changed to **Values for Matrix Item Attribute**, and the fields and titles that included the word **Color** have changed to **Attribute** for entities

designated for matrix items, only. **New Terminology**

The workflow of this module has not changed and will work as it always has.

MRP

MRP for Distributors

- **Deduct forecast orders** - We added the possibility to deduct sales orders and service calls from forecast orders.
- **MRP takes safety stock quantity into account when planning for assembled parts** - Now you can plan for assembled parts and their child parts, according to the safety stock definitions for assembled parts. **Customer Request**
- **Calculate purchase orders for assembly parts** - MRP now takes purchase orders for assembly parts into account. **New Behavior**
- **Analyze MRP results** - Analyzing MRP results is now easier using the subforms of the **Purchase/MRP Parameters for Part** form. In addition, we added a detailed message at the end of the program with direct references to the MRP analysis forms.
- **Limit the planning period** - Now you can limit the planning period by using the new **MRP&PurchPlanning** to input field in the **MRP for Distributors** program. **Customer Request**
- **Calculate alternate parts** - Now you can choose and prioritize if the MRP will be calculated for alternate part inventory, by using the **UsePartAlt** planning constant and the **Use Alternate First** checkbox in the **Alternate Parts** subform (in the **Parts** form). **Customer Request**
- **MRP run history** - Use this new form to view the history of program runs, including run time, relevant constants, and more.

MRP for Manufacturers

- **Deduct demand forecast** - Now you can define whether to deduct demands for parent part forecasts from demands for the part level forecasts. **Customer Request**
- **Deduct forecast and sales orders in MRP planning** - We added the option to choose if the MRP planning will calculate all the forecast and sales orders and not deduct one from the other.

System Maintenance

- **Choose basic data to update** – The **Update Basic Data** program allows users to update the basic data in their system according to the recent updates across Priority for their territory (e.g., tax rates and journal entry codes). Now the program allows you to choose the basic data to update, without having to update all the available basic data.
- **Option to block simultaneous program runs** – To allow a smooth and continuous workflow across the organization, we added the option to define which programs will not be able to run simultaneously, and in which situations (for all users, or for each user) Use the new **Block Parallel Program Run** form.
- **Change in time length for saving temporary files** – In certain cases, it is now possible to change the length of time the temporary tables are saved, that were created when running programs in the system that were not deleted at the end of the program as they should have been, using the **MAXLINKAGE** system constant.
- **Prevent running programs in Debug mode** – With the new **DEBUGRESTRICTED** constant, you can now prevent programs from running in Debug mode; just change the value of the constant.
- **Table structure management** – Users can now modify database tables using system development tools. (For users not assigned privileges of the system administrator group.) Just mark the **Table Structure Mgmt** checkbox in the **User Permissions** form.

Developer Tools

- **XML interfaces** -
 - To prevent empty tags from appearing in XML files, mark the new **Without Empty Tags** checkbox in the **Tag Definitions** form.
 - The **Form Load Designer -> Tags for Interface** form is now open for editing. In this form, use the new **R** option in the **Type of Value** field, if the tag is an end tag that repeats itself.
- **Limit large quantity of document printing at one time** - Now you can use **NFILE** instead of **FILE** when developing HTML documents in the report input. This will block attempts of generating documents in cases of wide searches (*), requiring the user to choose the input.

For more information, please see the [Priority SDK](#).