Priority Release Notes v25.1

Version 25.1 includes many new releases, among them:

- New Advanced Analytics Module: AI-powered chart analysis aiERP
- Advanced Delivery Planning Module (ADP): AI-powered optimization aiERP
- New Email Composer Experience: Transforming how you create and send business communications from the Compose Mail form aiERP
- New Field Service Application: Complete toolkit for field service technicians in one powerful app
- VS Code Integration: New coding experience that makes developing in Priority faster, smarter, and more intuitive, and AI ready

In this document you can easily identify:

- **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

Table of Contents

Priority Analytics

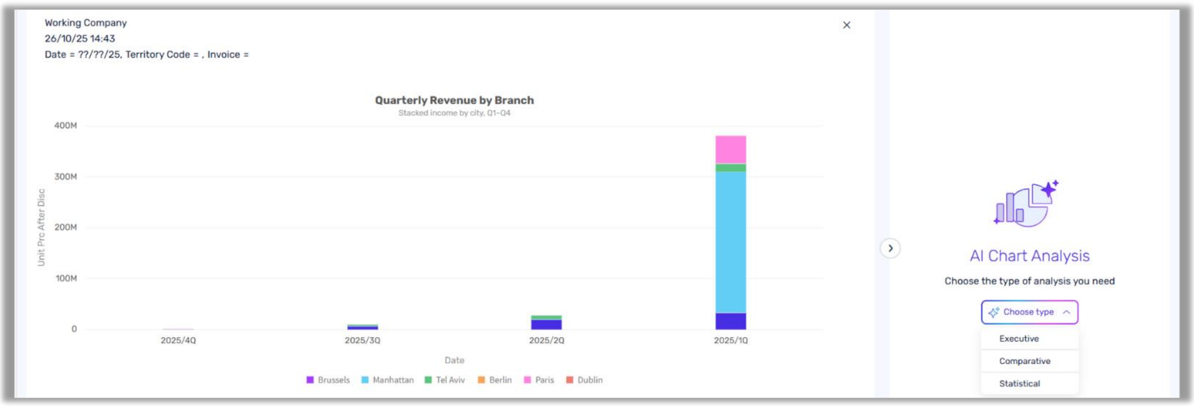
- **Advanced Analytics Module** (Priority cloud customers only) aiERP

  Priority is proud to introduce the new Advanced Analytics module, available exclusively for cloud customers. This module incorporates advanced enhancements to Priority Analytics, including AI capabilities that transform how you interact with and understand your business data.

  – **AI-powered chart analysis** – Priority Analytics now includes AI-powered chart analysis, helping you discover insights from your data more easily than ever.

    Choose from three tailored explanation styles:

    - **Executive** – Insights for leadership presentations and strategic discussions
    - **Statistical** – Detailed numerical analysis for data-driven decision making
    - **Comparative** – Multi-series chart data comparisons to identify trends and patterns



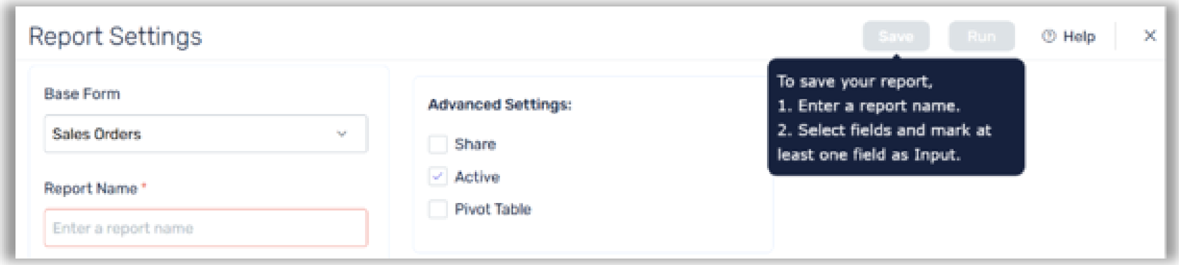
  This powerful new feature saves you valuable time by eliminating the need to manually interpret complex charts or write explanations for reports. It enhances communication by helping you share data insights with stakeholders using clear, professional descriptions that anyone can understand. The AI-powered analysis highlights what matters most in your data, improving overall understanding across your organization.

- **Priority Analytics reports for Predictive Models** aiERP

Transform your business data into powerful predictions. Build reports in Priority Analytics with a new process designed specifically for use in your AI Predictive Models, turning your historical data into actionable forecasts. Simply select the **New Report - AI Predictive Model** option and base it on relevant business data - sales invoices, shipments and returns, service calls, or other metrics that align with what you want to predict. Only supported with the purchase of the Prediction module.

For more information on working with AI Predictive Models, see the SOP.

- **Smarter report and chart saving** – Trying to save your report and missing a report name? Need to mark input fields? Set pivot axes? Priority Analytics now guides you with precise tooltips that appear exactly when needed, reminding you what to complete before saving. The system also protects your performance - it will not allow saving without input fields, preventing large, resource-heavy reports. The Input column is now clearly marked with an asterisk (*) to indicate this requirement. **Customer Request**



- **Privileges control for Priority Analytics** – Priority Analytics now only displays forms and fields to which users have at least Read access. Reports containing inaccessible forms or fields are completely hidden. Includes data permission support. **Customer Request**
- **Improved field selection for reports** – When building reports in Priority Analytics, forms that calculate data dynamically upon entry (such as product availability, credit, and liability) will not be available for selection, ensuring complete and accurate report results. **Customer Request**
- **Automatic sorting of hidden fields in reports** – Fields defined as **Hidden** now automatically move to the bottom of the field list when you save your report, ensuring proper report structure and organization. **New Behavior**

For more information, see the Priority Analytics SOP.

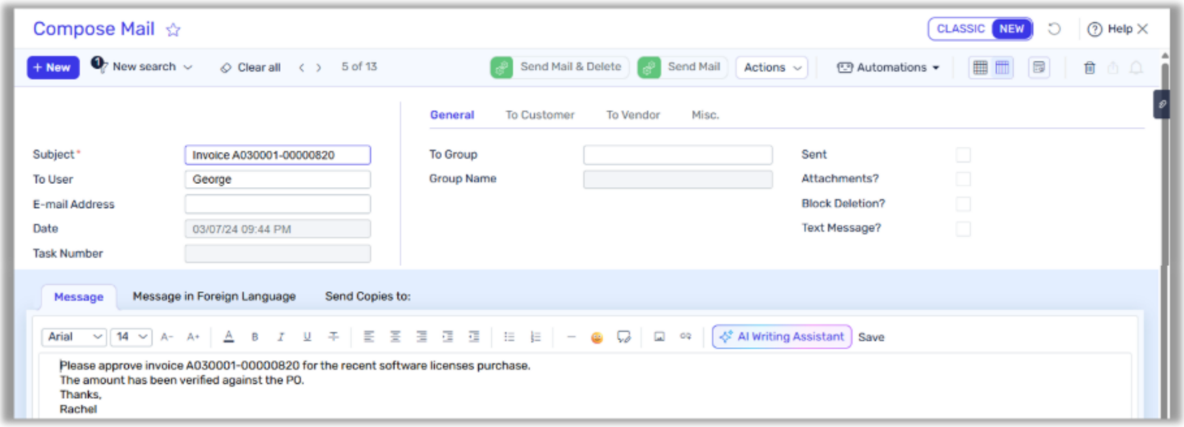
User Experience

- **New email editing experience with AI capabilities** aiERP

Priority is proud to introduce a new email writing experience, with an innovative editor that includes our smart AI-powered Writing Assistant.

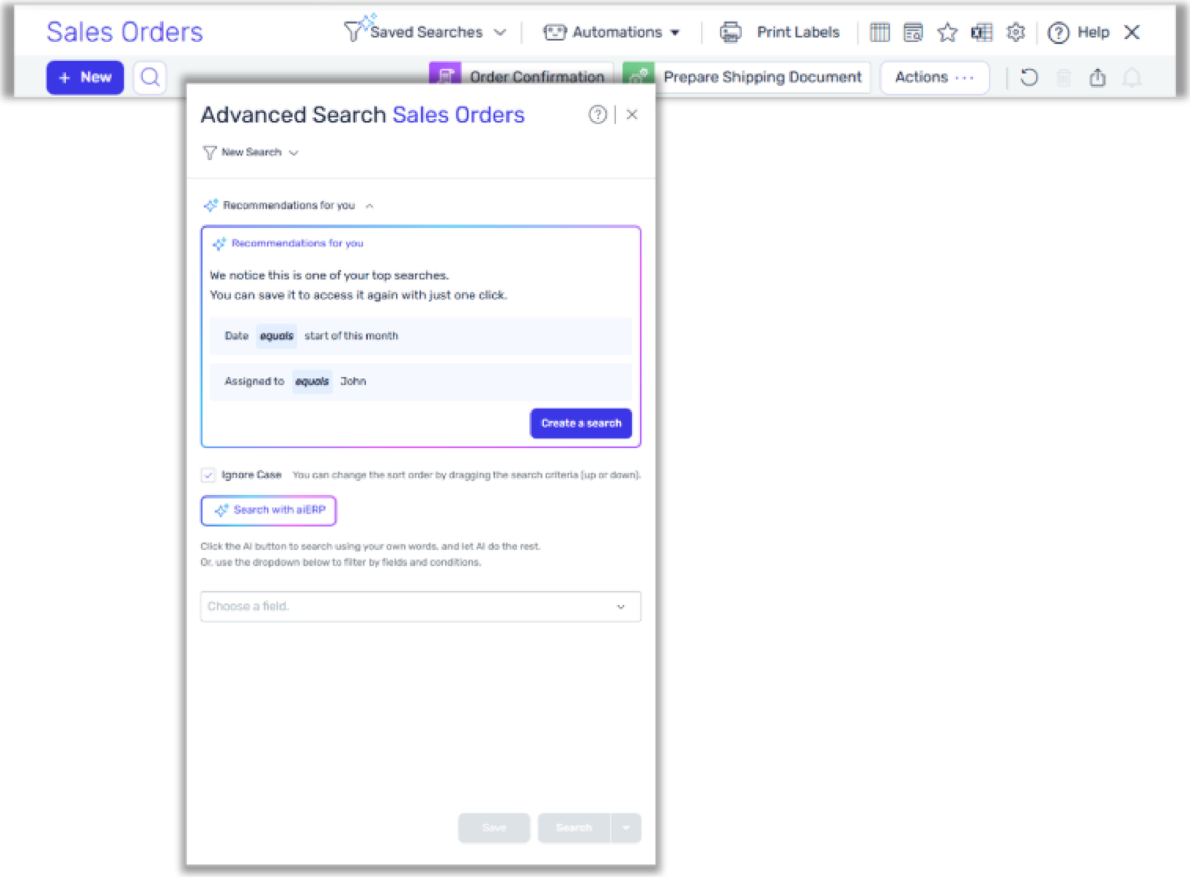
The AI Writing Assistant we introduced last version in BPM Rules, Business Rules, and Autofill Rules is now available in the **Message** subform of the **Compose Email** form (for cloud customers only).

The AI assistant in the new email editing experience helps you write emails that work for you – finding the exact tone and improving phrasing that drives results. The enhanced editor gives you design tools that enable advanced text formatting and adding images and emojis – everything you need to create professional, well-designed emails that stand out and attract attention. You can always easily switch between the new AI-enhanced editor and the classic one.



- **Enhanced search with AI-powered recommendations** aiERP

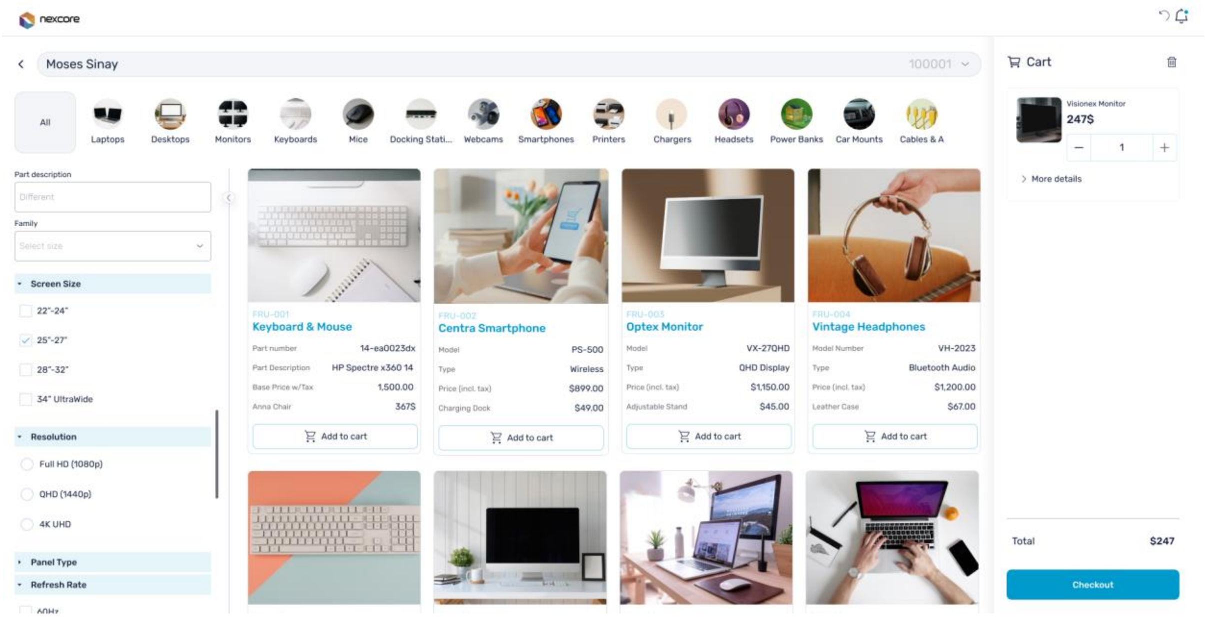
  When you access your Advanced Search, your personalized recommendations are already there waiting for you, pre-filled with the search conditions you use most often. This AI-powered intelligent feature transforms how you search in ***Priority*** - instead of starting from scratch each time, your most common searches are instantly available, making your daily tasks faster and more intuitive. (Cloud customers only)



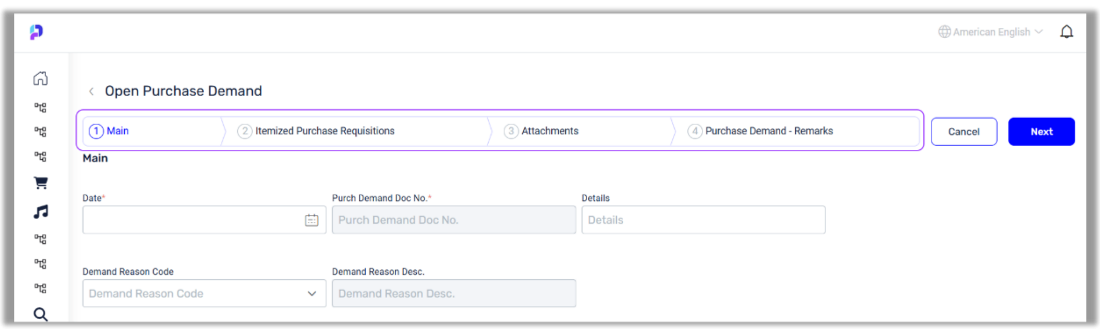
Portals

- **B2B Ordering View (E-commerce)** – We enhanced the B2B Ordering View with new features, enabling users to place orders from anywhere with advanced search capabilities, a customer-specific view, and flexible order management. This new view also works well on mobile devices.
  - **Items per customer** – Now you can define the new **Customer Parts** view. The system will display a part catalogue when opening an order, showing only parts defined for that specific customer. This capability gives organizations the ability to display different catalogues for various customer types.
  - **New search experience** – We expanded search capabilities in the B2B Ordering View. You can now define categories and subcategories according to your needs, and create a filter according to relevant attributes.

    For example, a customer looking for a 27-inch monitor with 4K resolution from a specific manufacturer will reach the desired product in just a click on the Monitors category, and then by selecting the relevant filters.



- **Canceling orders** – You can now choose between two options: either remove the shopping cart content and save the order, or cancel the order completely. **Customer Request**
- **Make payments with Priority Payments** – Now you can make payments directly from the portal using Priority Payments. Add the new payment option to sales orders, price quotes, and invoices, including the B2B Ordering View. For more information on Priority Payments, see the SOP.
- **Advanced Wizard experience** – We redesigned the wizard experience in your portal with a new look made for multi-step processes, for the most precise and intuitive navigation between steps. We also added a clear visual indicator so you can track the user progress – which steps were completed, which step the user is currently on, and which steps they still have to do.



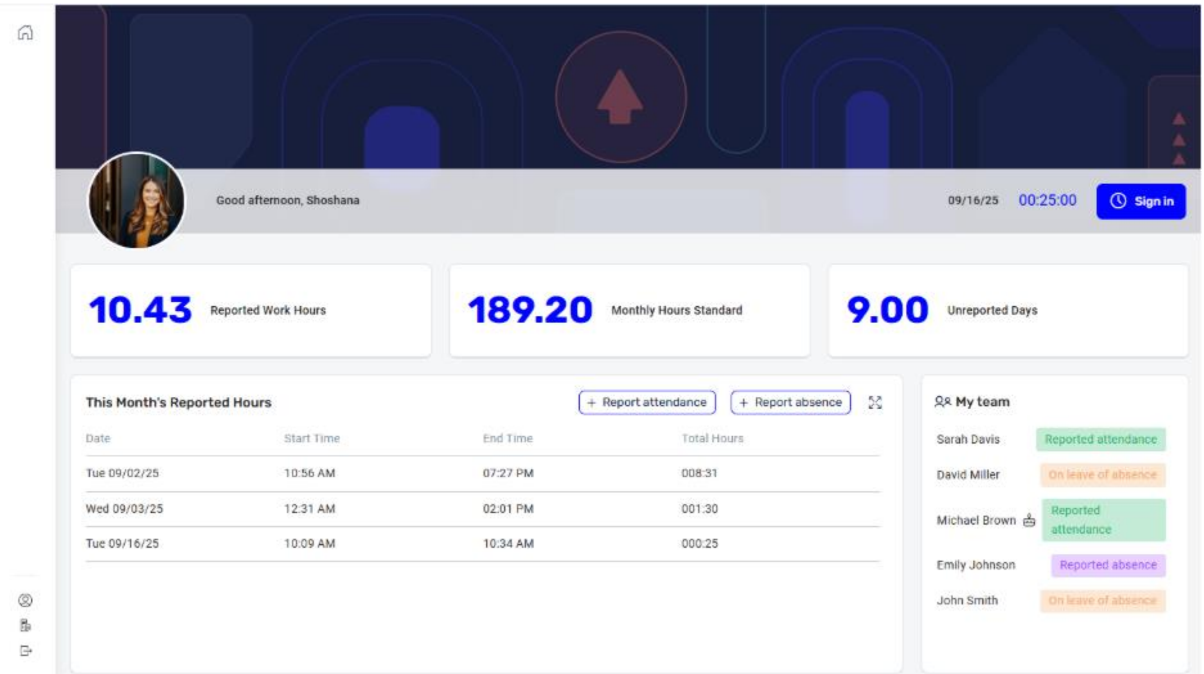
- **New home page for the Attendance Portal (predefined portal)** – We launched a redesigned home page that clearly and conveniently centralizes all important employee information right on the home screen. It enables easier and faster attendance reporting, and provides employees with an accessible, centralized tool for managing their work hours, while giving managers a comprehensive view of their team’s status.

At the top right of the page, you will see the **Sign in** button that allows employees to easily update login and logout times, alongside a counter displaying how long the employee has been working that day.

Additionally, employees can see the number of days not yet reported, total work hours reported for the month, and the required monthly hours quota. A monthly summary also appears, detailing start time, end time, and total hours for each workday.

Managers enjoy a unique view, showing the reporting status of each team member, such as attendance reports, absences, sick days or vacation, or missing reports. Alongside attendance data, you can also see which team members are celebrating birthdays this month.

The new page is based on an easy, convenient, and intuitive user experience, with a design adapted for both mobile and desktop viewing.



For more information on the Portal Generator, see the SOP.

Priority Mobile

- **Uploading attachments**
  - **Image editing** – You can now edit images directly in the mobile app using drawing tools. Service technicians can circle damaged equipment parts before sending photos to customers or warranty departments. Warehouse managers can mark available storage locations and share annotated images for better team planning.

– **Video support** – Upload and view video files directly within the application for enhanced documentation and communication.

– **Attachment field support** – Easily upload attachments from forms with attachment-type fields, such as Personnel Files or Part Catalogues, with an intuitive interface.

- **Card view**
  – **New design** – We improved the design of the card view, so you can easily see all the required information without unnecessary scrolling, while maintaining a clear and readable appearance.
  – **Side by side view in card view** – Scroll less, see more. Now you can define fields to be arranged next to each other instead of one on top of the other - now available in card view too.

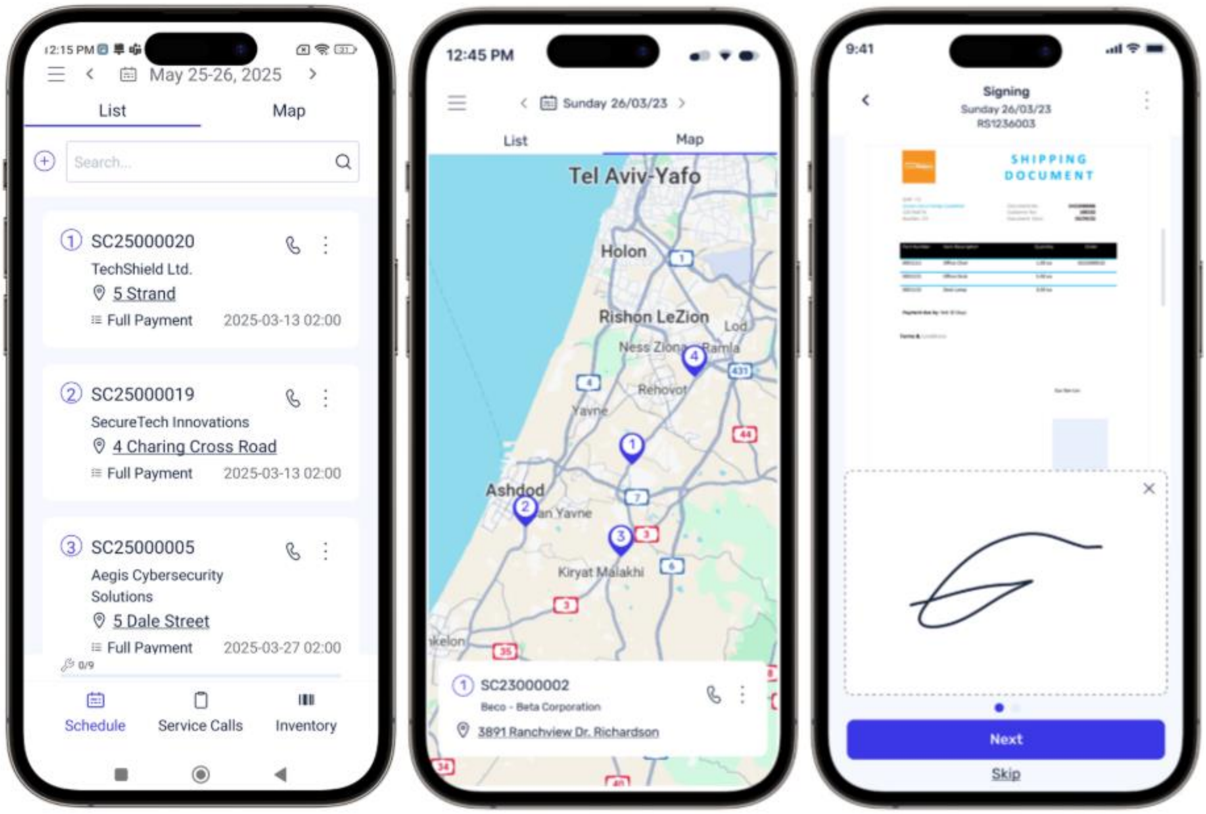
- **Automatic field focus** – Now when you update data in fields, the focus will automatically move to the next field. Forget extra clicks – work faster and smarter. Customer Request
- **Define fields as read-only** – From the Application Generator, you can now define fields as read-only in the application, providing flexibility in interface design in your mobile device, and allowing you to customize fields to match your specific workflows.
- **Search within fixed saved search results** – Users can now search within results from a fixed saved search. The search is limited to the existing results only, received from the fixed saved search. For example, if a user has a saved search for their assigned orders, they can search only within those orders, not all orders in the system. Customer Request

Field Service Application

- **Introducing the Field Service app** – Built for the field, designed for efficiency. The complete toolkit for field service technicians in one powerful, cross-platform (iOS/Android) app for cloud-based and on-prem customers. Detailed service call information, part issue tracking, time reporting, map navigation, and digital signatures - everything you need to deliver exceptional service.

  The application features an open service calls list, interactive map view, and advanced search capabilities. When working on a call, technicians can update repair types and status, manage parts inventory, report hours, and document completed repairs. The app works seamlessly offline, synchronizing data automatically when connectivity is restored.

Picture an HVAC technician at the start of their workday opening the app to see all scheduled service calls for the day. With a quick glance, they can view the route and customer details, a description of the malfunction, and notes from the service center. After completing each repair, the technician captures a digital signature and navigates to the next call. En route, they review the service history, arriving prepared for a swift and effective repair.



Financials

Reconciliations

- **Choose accounts in the split reconciliation work area** – Now just click on **Select Account**, and you can jump directly to a specific account without browsing through all accounts. Customer Request

- **Automatic account and invoice identification from bank statements** – The system now includes advanced automatic identification capabilities that streamline the bank statement reconciliation process, making it faster, more accurate, and simpler. Instead of manually identifying transactions in bank statements, the system automatically identifies the relevant customers, vendors, general ledger accounts, and invoices.

The new **Identify Account&Link to Invoice** program uses data imported into bank statements and serves as a preliminary step to the existing **Prep Receipts/Paymts/J. Entries** program.

- **Account identification** – The system automatically locates the appropriate account using a hierarchy of identification rules. Additionally, the new **Account Details-Bank Statements** form allows you to define additional relationships between system accounts and external bank details.
- **Invoice linking** – After identifying the account, the system automatically searches for the matching invoice based on defined criteria, such as full or partial reference and amount.

Additionally, we made changes to the Bank/AmEx Statement Items form:

- Extended the **Reference** and **Details** fields
- Added new **IBAN** and **BIC** fields
- Consolidated the **Paid by** and **Payee Name** fields into a single field – **Customer/Vendor Name**

Customer Request

- **What's new in Prep Receipts/Paymts/J. Entries** – Now you can record bank transactions directly in the **Prep Receipts/Paymts/J. Entries** program by marking the new **Record Bank Trans.** checkbox. Marking this box replaces the need to manually run the **Record Bank Transactns in Ledger** program.

Revenue Recognition

- **Exclude from revenue recognition** – To provide flexibility in routine work with this module, you now have the option to exclude specific documents from revenue recognition using the new **Exclude from Rev Rec** option. You can find this checkbox in the following documents:
  - Sales Orders
  - Sales Invoices
  - Multi-Shipment Invoices
  - Pro Forma Invoices
  - Over-the-Counter Invoices

– Export Invoices

Customer Request

- **Close transactions** – When you run the **Recognize Revenue** program, you can now choose whether journal entries will remain pending so you can still revise them before finalizing the journal entry. If the new **Post Entries** checkbox is marked (by default), journal entries will close automatically when the program ends. Customer Request New Behavior
- **Exchange rate based on original transaction** – Customers operating under various accounting standards can now set the exchange rate for revenue recognition to be identical to the exchange rate of the original transaction. In the **Revenue Recognition Rules** form, mark the new **Exch Rate by Txn** checkbox, and the system will automatically retrieve the exchange rate based on the original document date, and this rate will override the existing logic.
  Customer Request

Invoices

- **Tax calculation date** – The new **Tax Calculation Date** field in all sales invoice forms (excluding export invoices) allows you to specify a VAT determination date independently from the invoice date, with the flexibility to set different dates for individual invoice lines.

  This is particularly useful when invoicing for goods delivered in earlier periods – you can ensure the system applies the VAT rate that was in effect at the time of supply, rather than the current rate. This way, even if VAT rates have changed since delivery, your invoices will reflect the correct tax calculations.
  Customer Request

- **Copying invoices** –
  - **Copying over-the-counter invoices** – We added a new program that lets you copy existing invoices quickly, saving you from having to type the same information manually. You can duplicate the invoice for customers from the invoice, or for another customer, and define the payment method.
  - **Copy text from invoice details** – When you run the **Copy Invoice** program you can now mark the new **Copy Text for Parts** checkbox if you want to also copy text from the **Invoice Item – Remarks** subform.
  - **Copy profit centers** – In addition to the data copied today, now you can automatically copy all profit center fields, too.

    Customer Request

- **Split invoice lines for linking GRV documents** – Now you can link GRVs to finalized vendor invoices even when quantities do not match or when goods were received across multiple receipts. This new capability solves common scenarios where invoices are recorded before goods arrival and quantities differ between invoice lines and receipt lines.

  Use the new **Split Invoice Line** form to divide a single invoice line into multiple lines with different quantities. During the split, you can link each line to its corresponding GRV, and the linking happens automatically when you run the program - no additional action needed. Alternatively, you can split without linking to GRVs and connect them later using existing methods. The original line is replaced with the new lines while preserving all accounting data such as prices, discounts, and currency. Customer Request

- **Manual tax withholding** – We added a new option for manual withholding tax deduction in the invoice and in the payment. With this capability, you can manually define the withholding tax deduction amount. This is supported in the financial reports related to withholding tax deductions. For more information, see the SOP.

Meters

- **Flexible minimum commitments for meter billing** – In the meter count billing method, you can now define different minimum commitments for different periods, allowing you to adjust billing to seasonal patterns in your customers' activity. Through the **Special Minimum for Period** subform, you can set date ranges with specific minimum quantities or even waive minimums during certain periods (for example, during summer months if the organization is inactive). This option is also available for meter groups in the **Meter Part Numbers (Pool)** form.

Localization Enhancements

Global

- **Expanded exemption reason descriptions** – Tax exempt reason description fields now accommodate up to 120 characters across all forms, providing more space for detailed explanations. Customer Request New Behavior

Europe

- **Additional transfer details** – More information will now appear in the **Remarks** subform of the **Itemized Statement** form regarding the transfer when running the **Load Bank Statemt - Ponto Connect** program. Customer Request

- **SEPA interface** – You can now control how payments appear in your bank statements using the new **Ttl Amt-Bank Statemt** checkbox. This option lets you choose between displaying payments as a single consolidated amount or as individual transactions, allowing each organization to set up the process according to their specific banking needs.

- **Flexible due dates** – You can now set payment details once for the entire SEPA file or customize them individually for each transaction, giving you complete control over your payment scheduling. Customer Request

- **EC Sales report** – The EC Sales report now considers all customer sites. If a customer has sites in different European countries, the report will show the sales according to the countries of the sites, and not according to the customer's country.

- **Field name update** – We renamed the **Import XML** field to **Invoice Type to Load** in the **Financial Parameters for Vendors** form, to better reflect its functionality.

Germany

- **Early payment discounts** – Take advantage of early payment discounts on Reverse Charge invoices in Germany and non-EU transactions. The system automatically handles all complex VAT calculations, including line-level discounts and deductible amounts, ensuring accurate tax treatment while maintaining your operational flexibility. Customer Request

Portugal

- **Portugal Tax Authority - DocumentosTransporte** – Use the **Report to Tax Auth. - Portugal** program to submit your DocumentosTransporte to Portuguese tax authorities. Customer shipments and vendor returns are automatically formatted and transmitted to meet compliance requirements.

Angola

- **SAFT accounting** – We added support for SAFT Accounting for Angola, like we have for Portugal. Customer Request

North America

United States

- **Pay with Click2Pay** – We now support Click2Pay in our North America payment solution – BlueSnap, for all your invoice and order payments, and price quotations in a click.

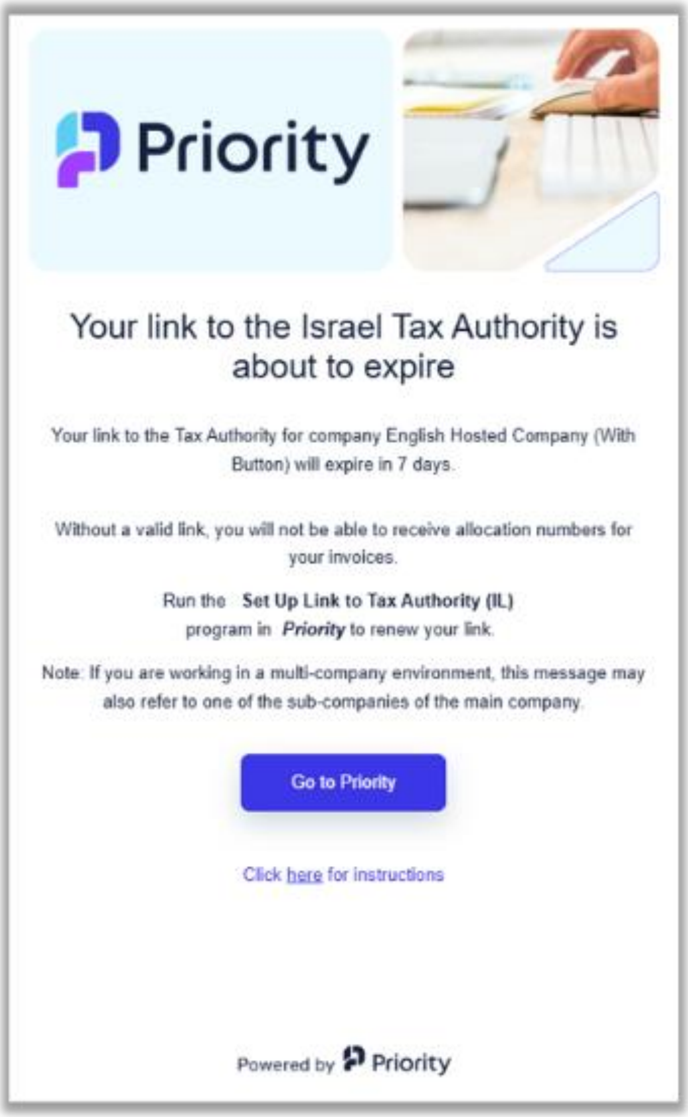
- **NACHA Interface** – We updated the NACHA interface to support values containing letters in the ACH payments field in the **Bank Accounts** > **Additional Information** form. Also, the restriction requiring the field to only contain digits (9-10 characters) has been removed.

Israel

Integration with the Tax Authority

To comply with tax authority requirements, we added support for the capabilities listed here. Cloud customers receive updates automatically. On-prem customers can get them by upgrading their version and downloading the add-on file from Xpert.

- **Tax Authority connection reminder** – Tax authority regulations require renewing the connection every three months. Now we will send you an email notification reminding you to renew your connection with the Tax Authority. Just run the **Set Up Link to Tax Authority(IL)** program to set up the reminder, and you will receive updates two weeks before the connection expires. Customer Request



- **Load vendor invoices from the Tax Authority** – You can now automatically import multiple vendor invoices directly from the Tax Authority through the new **Load Vend Invoices from Tax Auth** program, for invoices that have received an allocation number, saving you time and reducing manual entry errors. Use the program to import multiple invoices simultaneously based on a date range and your selected list of vendors.

- **Tax authority transmission log file storage** – You can now control whether the system saves log files generated during tax authority transmissions when obtaining allocation numbers for invoices and donations, with the new **SaveTaxLogFiles** financial constant. Since these log files serve only audit purposes with no legal retention requirement, you can disable storage to conserve space. If you choose to retain them for tracking and control, you can delete them anytime using the **Delete Tax Auth Transmit Files** program.

- **Automatic allocation numbers for donation receipts** – Now you can receive allocation numbers from the tax authorities for donation receipts automatically. The system will automatically transmit every donation receipt and receipt cancellation to the tax authorities and receive an allocation number immediately upon receipt finalization, eliminating the need to manually run the allocation program. In addition, per legal requirements, the system blocks original receipt printing without an allocation number - if you try to print an unapproved receipt, you will see text indicating the allocation number is pending.

See the SOP for more details.

Finance – Israel

- **Automatic loading of price indices from the Israel Central Bureau of Statistics (CBS)** – We added a new program for automatic loading of index data from the Central Bureau of Statistics, for example, the Consumer Price Index and the Housing Price Index. The program updates index rates relative to the index base in the system, and updates rates on the 1st of each month.

  For more information, see the SOP. Customer Request

- **Credit card processor error messages update** – We updated the credit card processor error messages and added reference numbers to each error. With this information, users can contact the processing company and receive additional information about the source of the problem. Unmapped errors will display a default message with the error number.

- **SHVA Interface - Support for tourist card identification and other card types** – The SHVA interface now captures and displays credit card type data through credit card transactions received from SHVA. We added the new **Card Type** field to the **Payment Means** and **Returned Clearing House Values** form, enabling identification of card type during the clearing process.

Payroll – Israel

- **Proportional payment calculations** – We added proportional fixed payment calculations with three new options based on actual working days, paid days, or calculation days versus monthly standard working days.
- **Retroactive pension fund adjustments** – Calculate retroactive pension fund adjustments with just a few clicks using the new **Dictated Differences** checkbox in the **Update Amounts to Funds** form. Instead of manually calculating complex adjustments when insured salaries change or corrections are needed, simply enter the adjustment amount and date range - the system automatically handles all retroactive calculations without considering previous contributions. This eliminates calculation errors and saves valuable time for payroll administrators who previously needed to compute actual amounts plus adjustments manually.
- **Payroll regulation updates** –
  - **Form 106 update (2025 Compliance)** – We updated Form 106 in accordance with the Income Tax Authority guidelines for 2024. As a result, convalescence days deducted from an employee will appear as a deduction on Form 106 sent to the Tax Authority.
  - **Kibbutz member reporting in Form 101** – We added the option to specify whether a kibbutz member's income is transferred to the kibbutz or remains with the employee. This selection automatically updates Form 126 accordingly.
  - **Automatic separation of reserve duty and injury compensation payments** – We improved the handling of reserve duty payments and injury compensation in Form 126. The system now automatically separates these two types of payments and calculates them accurately for both hourly and monthly employees.
  - **Public sector salary reduction** – We added support for the Public Sector Salary Reduction Law which proposes that a salary reduction for all public sector employees in Israel for the purpose of participating in war expenses.

Inventory Accounting

- **Detailed inventory posting by part number** – When working with perpetual inventory, you can now create detailed journal entries by part number, allowing you to easily analyze your inventory data and quickly trace the source of each transaction and the item value. This new capability will improve control over inventory account balances, increase transparency, and enhance the ability to reconcile financial inventory with logistics.

- **New alerts and controls in financial inventory posting** – We added two updates to the inventory posting control in financial accounting:
  - A dedicated reminder/alert to run financial inventory posting upon completion of the actual costing process, ensuring proper and complete recording of costing impacts on financial reporting.
  - A control that prevents assigning warehouses not included in inventory value to balance sheet accounts of inventory type (assets), preventing incorrect accounting entries and mismatches between inventory value and inventory accounts.
- **Standard actual variance account split** – We split the **Standard-Actual Variance - Raw Material Price** account into two accounts – debit and credit, based on the variance direction from standard. This allows for separate tracking of cases where actual price exceeds standard (considered a "loss" relative to standard) versus cases where actual price is below standard (considered a "gain").

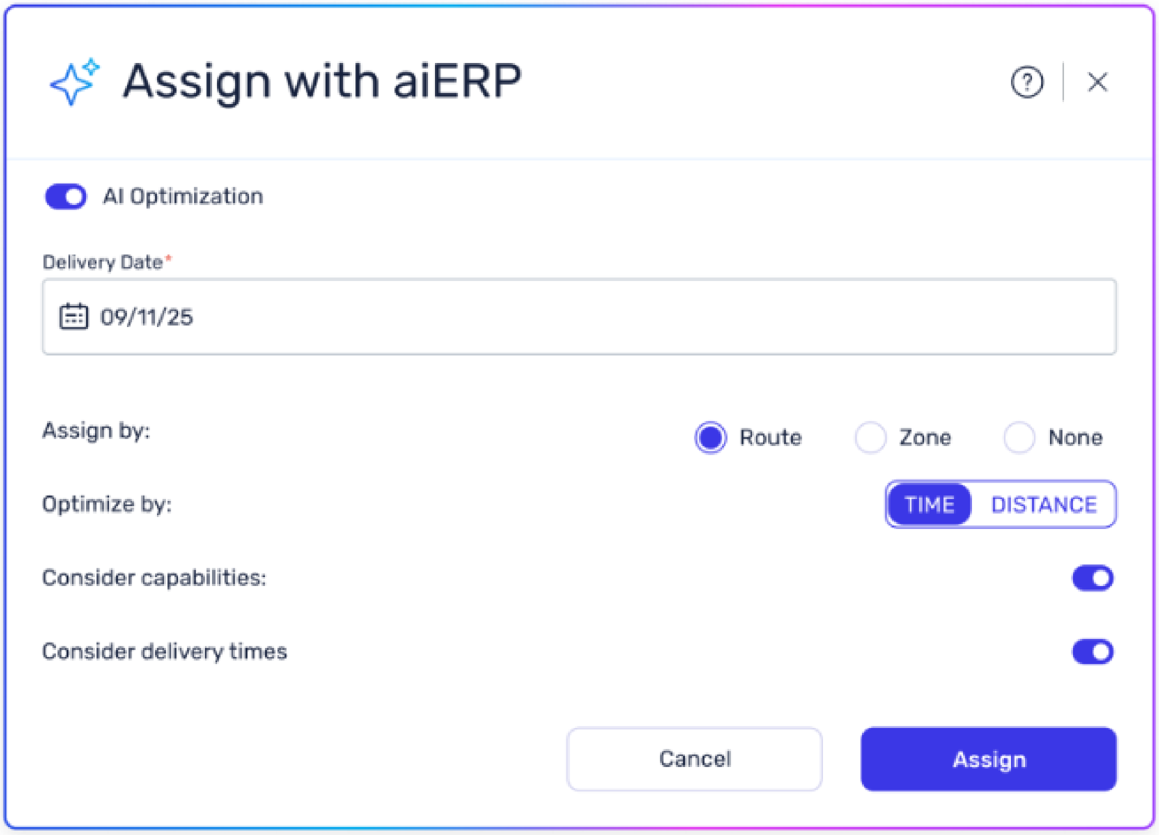
  The variance entry is created when posting a vendor invoice or **Goods Received Voucher**, according to the **COGSPriceVariance** financial constant setting.
- **Improved analysis of logistics-financial inventory gaps** – To enhance reconciliation between logistics and financial inventory values, we added the ability to show temporary journal entries in the **Check Perpetual Invent. Entries**. This addition enables accurate and immediate gap analysis between logistics and accounting records before completing the financial posting process.

Supply Chain Management

Advanced Delivery Planning Module (ADP) aiERP

Our Advanced Delivery Planning module guides you through the whole delivery planning process from start to finish, making delivery management easier than ever.

- **AI-powered optimization** – Automated route optimization powered by aiERP is now available to help dispatchers create the most efficient routes for drivers, reducing travel time and fuel costs. The system uses advanced algorithms that consider truck capacity (volume and weight), delivery time windows, service times including unloading requirements, and custom truck capabilities such as crane, refrigeration, or other specialized equipment requirements to automatically reorder delivery stops for optimal efficiency. Dispatchers can optimize entire routes, partial routes, or create multiple optimized routes from planned deliveries directly through the ADP interface, immediately seeing the improved delivery sequence that maximizes operational efficiency.



Smart Order Tracking & Visibility

- **Order line status tracking** – Automatic status updates for order lines based on changes in related logistics documents. Define which documents and statuses will affect updates, and gain full control over service times and logistics processes - without manual errors.

Delivery Planning

- **Delivery scheduling per order item** – We added support to update the quantity, weight, and volume when working with order lines, not just orders. For more information, see the help for the **SUpdOrdDet** constant.
  Customer Request

Approval Lists

- **More fields in email approvals for purchase orders and demands** – When a purchase order or purchase demand is sent for your approval, you now have more information including the company name and delivery date. This especially benefits organizations working in a multi-company setup in the system. Customer Request

POD Application (Proof of Delivery)

- **Personalized POD menu** – You can now personalize your POD application menu by selecting up to 5 reports and programs that matter most to your workflow. This new menu allows you to choose from available reports and programs, and to customize their names for easy recognition.

Rentals

- **Calculating rental item availability** – Now the calculation of rental item availability considers items marked as **Canceled** in the **Rentals** form, to enhance the accuracy of the availability calculation.

- **Expected rentals revenue report** – A new report that provides visibility into future revenue streams from rental documents, broken down by month, like the **Upcoming Payments for Contracts** report in the Customer Service module.

  The report offers a complete view of anticipated revenue from all active rentals, including rentals that continue beyond their original end date, enabling identification of revenue trends and data-driven business decisions.

- **Flexible daily rate calculation for partial month rentals** – When calculating partial rentals with monthly rates, you can now choose how to calculate the daily rate. The new **Daily Rate Calc** by field in the **Rental Types** > **Rates for Rental Periods** form lets you select between two calculation methods: divide by 30 days (default) or divide by 365 days (monthly rate times 12 divided by 365).

ATP Available to Promise

ATP Availability Checks

- **ATP program for commercial companies** – We added the ATP (Available to Promise) program to the **Sales Orders** > **Order Items** form: **ATP Stock Availability Check**. In just one click, users can:

  – Instantly check whether ordered items can be supplied in the requested quantity and on the requested date.

  – Get the earliest possible delivery date, in cases where the requested date cannot be met.

  – Access ATP result forms by item, and get a complete picture of inventory availability and reasons for delays along the supply chain.

  The program considers current inventory, expected balances according to Purchase Planning, and additional Planning Parameters such as Purchase Lead Times, Shipping Days, and Testing Days.

- **ATP availability check by vendor for purchasing** – You can now perform availability checks for ordered item delivery based on purchasing from a specific vendor. This functionality allows users to check whether changing the purchasing vendor in a sales order line can expedite the delivery date, thereby selecting the optimal vendor according to timelines. This feature enables you to improve the purchasing and delivery planning process, reduce waiting times, and improve adherence to customer commitments.

- **ATP availability check** – To strengthen control during the availability check process and prevent errors in customer commitments, we added a warning in the ATP (Available to Promise) check for items whose sales orders are not included in planning, for the following reasons:
  - Items with fixed consumption
  - Planning depends on manual work order initiation (MRP for manufacturers only)
  - Non-inventory managed items

Inventory

Warehouse Management (WMS)

- **Summarized reporting for consolidated quantities across multiple orders** – To eliminate repetitive data entry, you can now define a new summarized reporting method, so warehouse workers can report aggregated quantities when picking the same item from the same location for multiple orders.

  Additionally, a new flexible document grouping feature allows users to control how target documents are created - by customer, by order, or using existing logic. These enhancements reduce time spent on data entry while providing better control over document organization and warehouse workflow efficiency.

  This functionality is supported only in the new app versions. For more information, see the SOP.

- **Clearer restricted entity name in WMS mobile application** – When running the WMS mobile application, attempting to access entities through the app not included in your license, will now show clear error messages to identify the specific entity name that caused the access restriction, making it faster to identify and resolve access issues.

- **Support for copying attachments** – Now your attachments will be copied from one document to another, for example, sales order attachments will be copied to the customer shipment document following a PIK task.
  Customer Request

Serial Inventory

- **Serial location protection** – To prevent inventory discrepancies, now the system will prevent manual changes to serial location fields in the **Catalogue of Parts w/Serial Nos.** form. When serial tracking is enabled (**ISerialTrans** = 2), location changes must now be made through proper inventory transactions only. New Behavior

Inventory with Complex BOMs

- **Multi-level BOM explosion availability** – Now you can perform a BOM explosion and show available inventory across all BOM levels, directly from the **Part Catalogue** form, in a fast, detailed, and analysis-friendly manner.

  In the new form, you can see exactly how many units of the parent item can be manufactured based solely on component inventory – without dependency on timelines or future planning data. This helps planners and production managers quickly assess production potential based on existing inventory, make informed real-time decisions, and identify bottlenecks in the supply chain.

Production

- **Backflush priority for kit components from the floor warehouse** – Until now, lot-managed kit components were backflushed based on the lot's expiration date (FEFO – First Expired, First Out). From now on, backflush priority will first rely on the issuing date (FIFO – First In, First Out) and only then consider expiration date. This change delivers more consistent and reliable material consumption — especially in continuous-production environments — improving inventory visibility and control.

Purchase Planning and MRP

- **Additional planning parameters** – You can now define vendor-specific planning parameters for cases in which items are purchased from multiple vendors, each with different settings:

  - Lead Time
  - MOQ (Minimum Order Quantity)
  - IOQ (Incremental Order Quantity)

    (in the **Purchase/MRP Parameters for Part** > **Planning Definitions for Vendor** form)

  These parameters affect:

  - Recommended order and delivery date calculations in various forms and reports, such as purchase demands, purchase orders, and recommendation reports
  - Planning programs when a vendor is selected for a sales order line or when a preferred vendor is defined for an item.

- **Assign default manufacturing branch per item and kit list** – When working with MRP by branches, now you can assign a default manufacturing branch to each item. When the item is included in a Bill of Materials (BOM), you can also define the manufacturing branch at the kit level.

  Additionally, you can assign sales order lines to a manufacturing branch as needed in real-time. This capability allows you to route lines so that planning programs will open work orders in branches that were manually selected according to actual needs. This adds planning flexibility and enables efficient coordination between branches and production sites, particularly in multi-site systems where each branch functions as an independent production unit.

- **Multilevel pegging** – You can now peg work orders across multiple levels in the product tree. When planning production for a product with a multi-level BOM, the system plans a work order at the parent level, which creates demand for the next level, and so on – down to the lowest levels. This new capability lets you peg each work order to the child work orders planned for it, creating a complete pegging chain throughout all levels of the product tree. When all levels are pegged and the parent level is linked to the order, you get an end-to-end pegged production tree – ensuring complete control and traceability across all BOM levels.

- **Calendar week grouping** – We added the option to group work orders or purchase demands by week in planning programs. The week starts on the day you define in the **MRP Definitions** form. This feature helps you:
  - Consolidate weekly activities for better supply chain management
  - Reduce production and logistics costs
  - Improve planning accuracy and meet deadlines more reliably

- **Materials available for orders** – We added to the **Materials Available for Orders** report (from the **SUMMARIZE** reports menu), the option to display intermediate levels and account for their floor stock for parent items in sales orders.

Priority Accounts

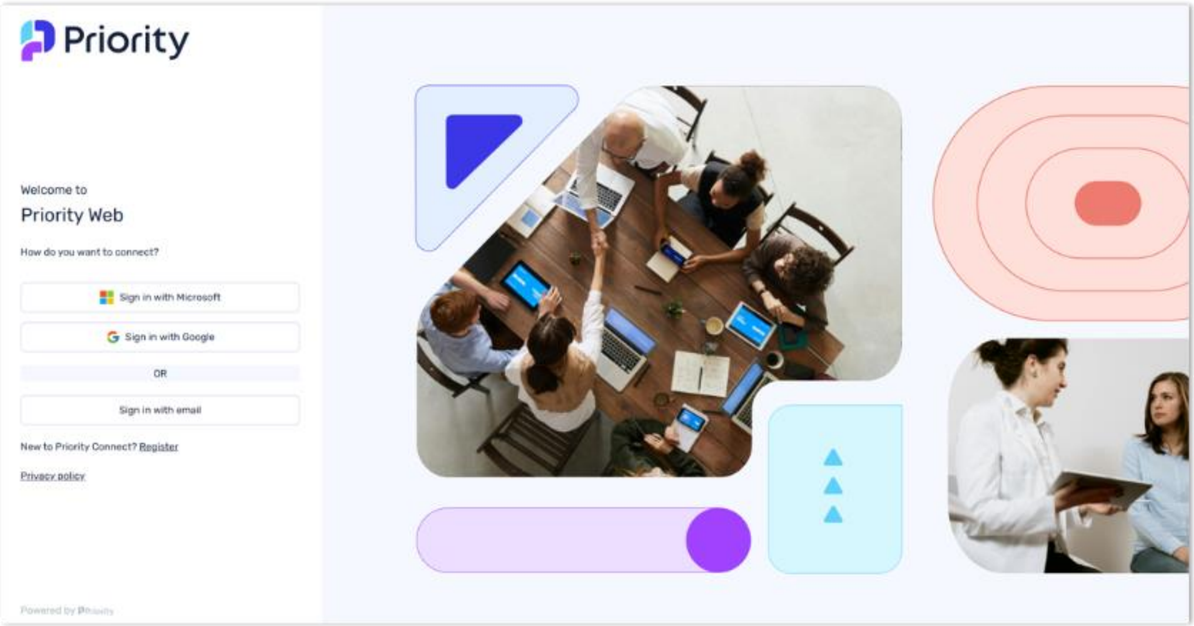
- **Introducing Priority Accounts** – ***Priority***'s new authentication method for faster, easier, and more secure system access using existing Google or Microsoft accounts. No additional passwords needed.

Sign in directly with your Gmail or Office 365 account. This solution includes **two-factor email authentication** for enhanced security and provides **unified access to all Priority services**, including Priority Mobile, Click2Sign, Click2Approve, and portals.

Priority Accounts meets leading SaaS standards and delivers an advanced, unified user experience. Simply enter your email address associated with your user account and select your preferred sign-in method.

This service is for cloud customers only. Migration is underway. Interested customers should contact our support team.

See the SOP for more details.



Performance and Stability

- **Performance and stability optimization** – In this version, we made significant strides in improving both performance and stability across the platform.

  We focused on optimizing performance in several key areas: sales document forms, vendor payment preparation, Word template printouts, portals, and more. These optimizations have resulted in faster execution times and reduced downtime, and are designed to deliver a smoother, more reliable experience, ensuring consistent and seamless interactions with ***Priority***.

- **Customer credit and liability calculation** – Now you have more options for filtering, to improve performance and control over customers included in credit and liability calculations. Customer Request New Behavior

- **Update multi-company exchange rates** – You will now receive a notification that you can run the **Get Exchange Rates** program (and for Israel, also the **Import Israel Bank Exch. Rates** program) once every 10 minutes for all companies marked with the **MultiCo Exch Rates** checkbox, to improve system performance and stability. New Behavior

System Administration

- **Priority Management Console** – We're excited to announce the launch of the ***Priority*** Management Console, a new tool that empowers you to independently manage essential cloud operations. In this initial release, you can configure allowed IP addresses and create system snapshots, with additional features like test environment setup, system upgrades, environment removal, SSO configuration and more coming soon. For more information, see the SOP.
- **SQL Express installation** – When restoring from archive or performing a new Priority installation, you can now choose which SQL Express version to install by updating the path to the folder containing the file in the program input. New Behavior
- **API transactions** – API transactions now use a shared count for all users. Previously, each user had separate transaction limits. Now all users share one transaction pool based on your license. This change happens automatically when you upgrade to version 25.1. You will see a summary of the transactions in the license report.

  For example, if you have one API user for Shopify integration and another for Power BI reporting, they now share the total transaction pool. Each integration can use transactions based on actual needs - Shopify might use 8,000 while Power BI uses 2,000 from your 10,000 transaction license.

  For license questions, contact Customer Relations. Customer Request New Behavior
- **SQL server integrity check** – Now you can run the **Run Integrity Checks-SQL Server** program in the Web interface, as well as in Windows. This program serves the DBA for checking the integrity of tables in the system's database.
- **Define email accounts for Tabula** – Cloud customers: Now a user with tabula group permissions can define an email account for tabula, to send timed emails from the system using the TTS (Tabula Task Scheduler). They can also define the sender's name (the name that will appear as the sender) for a tabula user. New Behavior

- **Query performance monitoring** – Monitor and identify slow-running queries that may impact system performance. The new **HEAVYQUERY** system constant lets you set a threshold (in seconds) to automatically track queries that exceed this time limit. View these queries in the **Queries in Process** form to quickly identify performance bottlenecks caused by inefficient customizations. This visibility helps you pinpoint exactly which processes need optimization to improve system performance. For more information, see the SOP.
- **Support for New Outlook** – ***Priority*** now supports Microsoft's New Outlook, allowing you to continue sending emails from print programs, and sending record links from forms. After configuring ***Priority*** to use the New Outlook by running the **Initialize Outlook Definitions** program, wherever emails previously opened automatically in local Outlook, due to reduced Outlook capabilities, the email file will now download to your computer and you will need to open it manually to make changes and send it. For more details, see the SOP.
- **SFTP password field extension** – We expanded the **Password** field in the **Definitions for SFTP** form to support complex passwords.
  Customer Request
- **Control the time reports run** – Now you can use the new **MAXREPTIME** system constant to control how long your reports will run for. Reports that run for longer than the defined time will automatically stop, and you will receive a message from the system when you generate the report.
- **Added change log** – We added a change log to the **Company Data** and **Subsidiaries** forms, so you can review, and track changes made to these forms.

Developer Tools

VS Code

- **Direct code editing in VS Code** – Developers can now open **Priority** code directly in VS Code. When working in Form or Procedure Generators, simply drill down to open triggers or procedure steps directly in the VS Code line. This integration with the Priority Dev Tools extension eliminates the need to manually navigate through code files. Use the new **USEVSCODE** system constant to get started.
- **Syntax highlighting for *Priority* code** – Your ***Priority*** code is now more readable and clearer. CURSOR blocks, system variables like RETVAL, SQL functions, and other code elements are automatically highlighted in different colors, helping you quickly understand code structure and identify issues. Includes support for popular color themes.

- **Procedure step editing** – SQL steps now appear as separate files, so you can view and edit easily, without navigating through lengthy code, and add and delete steps directly from VS Code.
- **Instant error message display** – Use a keyboard shortcut to show error and warning messages directly next to where it is referenced in your code. No more switching between VS Code and Web Interface to look up what users will see - the actual message appears instantly at your fingertips.
- **Direct form and procedure preparation** – You can now prepare forms and procedures directly from VS Code and receive the results instantly in the editor, without switching to ***Priority***.
- **Advanced code search** – Use WINDBI's "Find String" to search across your form triggers and procedure steps, filter results by trigger type, and jump directly to the exact line in your code with a single click.

For more information, see VS Code extension page in the Marketplace.

API

- **Mandatory field indication** – We added mandatory form field indicators for entities to the Metadata retrieval, alongside existing key fields, to simplify ***Priority*** integration development.
- **Metadata for a specific entity** – Now you can run a metadata request for any upper-level entity.
- **API record limitation** – We created a new system constant, **MAXAPILINES** to restrict the maximum number of records returned by API calls, (instead of **MAXFORMLINES**), allowing separate optimization for form displays versus API data retrieval.
- **ODBC** – We now support using the ODBC with PAT authentication (Personal Access Token).

For more information, see the Developer Portal.

Priority SDK

- **New "UPSERT" function** – We added a new function (**UPSERT**) to the ***Priority*** SDK. When performing an update to a record in the system and using the new function, if the record does not exist, it will be created automatically.
- **Interface generator for forms (JSON)** – You can now find more capabilities for working with JSON. For example, when you load an interface, the tags will be recorded by tag name and not by the field name in the form.
- **WSClient** – In WSClient, we added support for the response file where Content-Type: application/soap+xml.

For more information, see the SDK.