Priority Release Notes v26.0

Version 26.0 includes many new features, among them:

- aiERP Companion aiERP
  - Conversational AI Built into ***Priority*** aiERP
  - aiERP Agents – Your AI Workforce for ***Priority*** aiERP
- Advanced Analytics Module: AI-Powered Report Analysis aiERP
- AI-Assisted Account, Bank, and Credit Card Reconciliations aiERP

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

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Priority

Developer Tools

aiERP Companion aiERP

aiERP Companion: Just say what you need - *Priority* takes care of the rest

Meet a new way to work with ***Priority***.

aiERP Companion brings the power of AI directly into your ERP, turning every action into a simple conversation.

Need to run a report? Update records? Export to Excel?

Just describe what you need - **aiERP Companion** handles the rest.

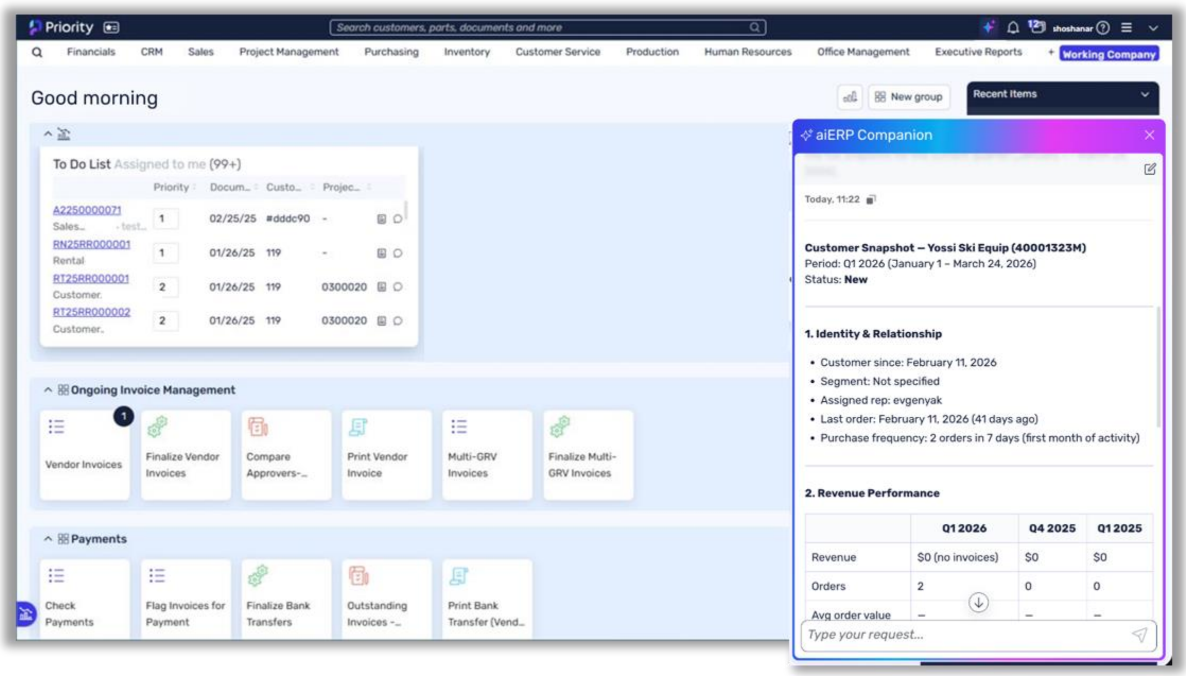
No menus. No searching. No learning curve. Just faster, smarter, more intuitive work.

The AI agent guides you through every step, executing routine tasks and streamlining complex workflows, so you can focus on what actually matters.

This isn't just a system upgrade, it's a fundamentally better way to work.

This feature will be rolled out gradually to ***Priority*** cloud customers and may be subject to additional licensing costs.

For more information, see the SOP.



aiERP Agents – Your AI Workforce for *Priority*

Priority's new AI Agents take aiERP beyond answering questions - they now take action. Each agent is a purpose-built AI assistant that guides you through a complete business process end-to-end: asking for the information it needs, validating as it goes, and executing the transaction in ***Priority*** on your behalf.

Version 26.0 introduces agents spanning sales, purchasing, finance, payroll, and inventory.

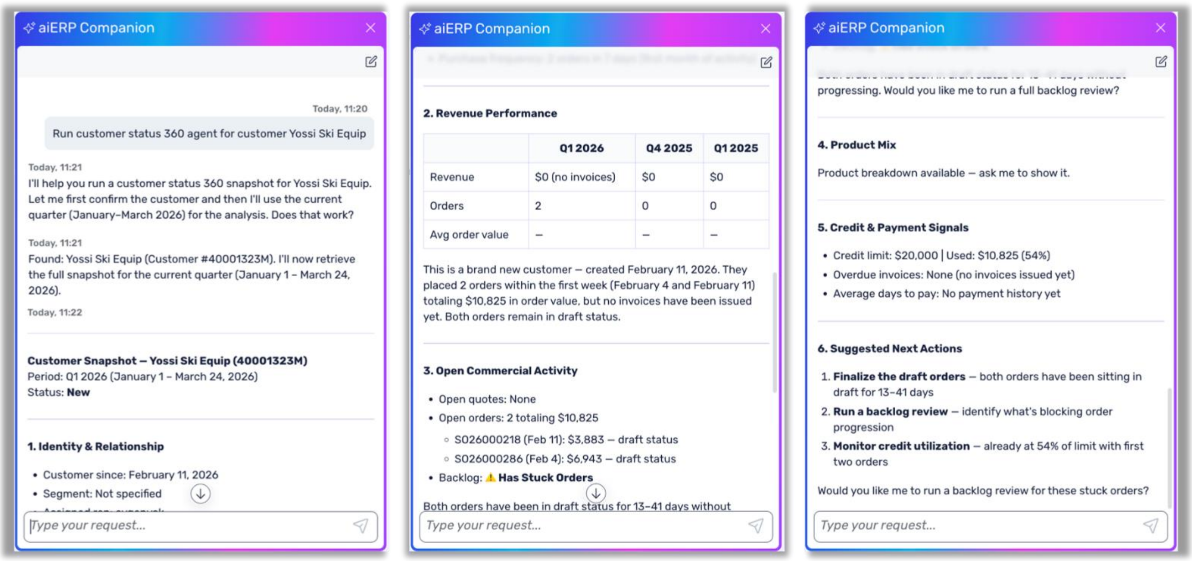
A few examples of what agents can do for you:

- **Purchase Order Agent** – Tell it what you need to order and from which vendor. It collects the details, checks for duplicate POs, and creates the order - no form-hunting required.
- **Customer Analytics Agent** – Get a full account snapshot before a sales call: revenue trends, open quotes, stuck orders, and credit signals - all narrated in plain language, no report-building needed.
- **Journal Entry Recording Agent** – Describe an accounting transaction in plain language. The agent identifies the entry type, validates the accounts, ensures the entry balances, and posts it.

Try these to get started:

- *"Create a purchase order for [vendor]"*
- *"Give me a snapshot of [customer name]"*
- *"Check stock availability for [part number]"*

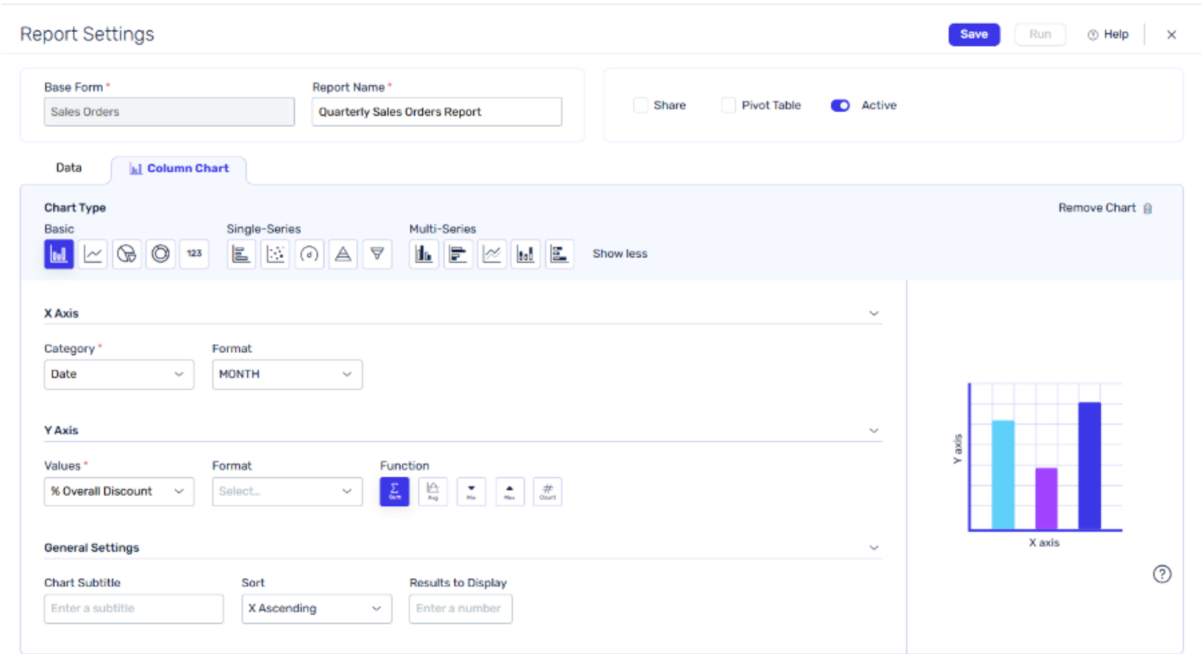
Agents are available directly from the aiERP panel. Just describe what you need to do – the agent handles the rest.



Priority Analytics

- **Simplified Analytics creation flow** – To create a simpler, more intuitive report-building process in Priority Analytics, we streamlined the report and chart building flow. Build your report and add a chart on top by simply choosing a chart of your choice to represent the data in the way most suitable to your business needs. The underlying report will be available as the chart's explanatory report - no configurations necessary. **New Behavior**

  See the updated Priority Analytics SOP for more details.



- **AI-powered report analysis** (for companies on ***Priority***'s cloud) aiERP

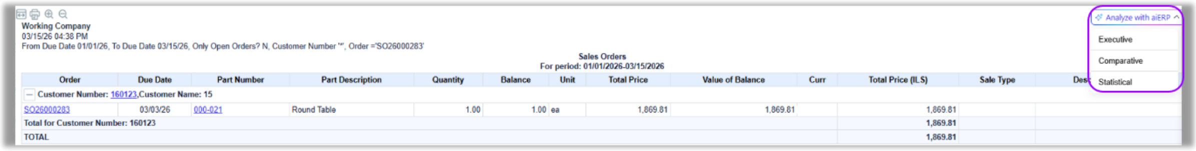
  AI-powered report analysis helps you discover key insights quickly from your data, like we added last version to Priority Analytics Charts. This feature reduces manual analysis time by generating clear, structured summaries, and enhances communication by helping you share data insights with stakeholders using professional descriptions that anyone can understand. The AI-powered analysis highlights key trends, anomalies, and significant changes in your data, improving overall understanding across your organization.

  Choose from three tailored explanation styles:

  – **Executive**

  – **Statistical**

  – **Comparative**

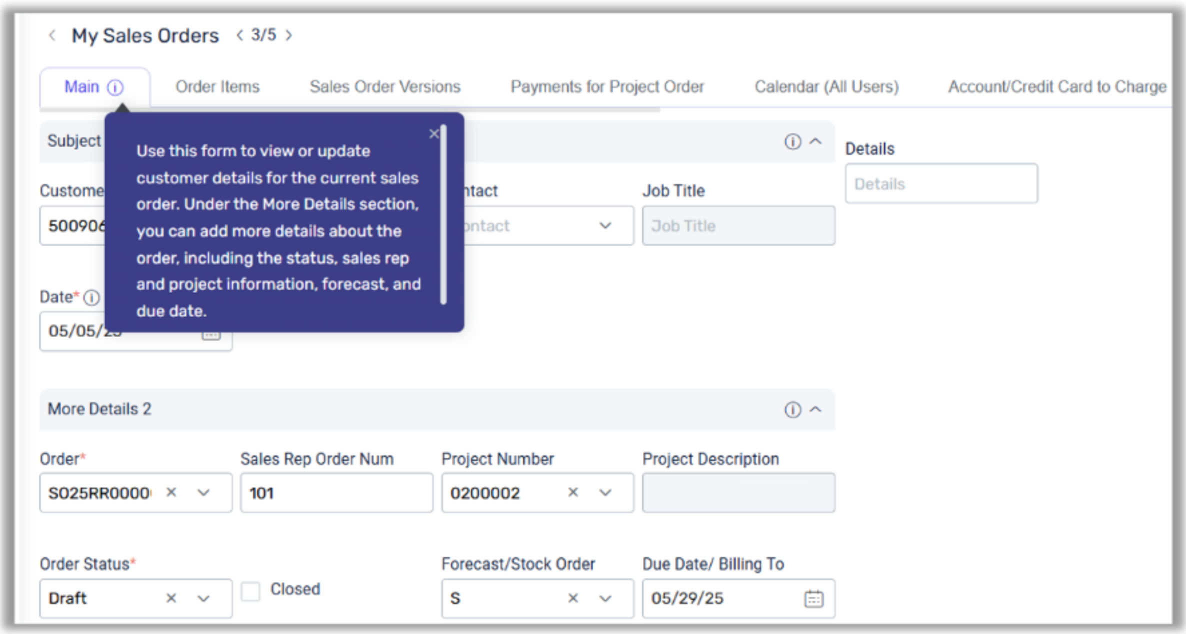


- **Run reports created in old report generators** – You no longer need to enter the old report generators to run your legacy reports, as you can run them straight from Priority Analytics. Customer Request

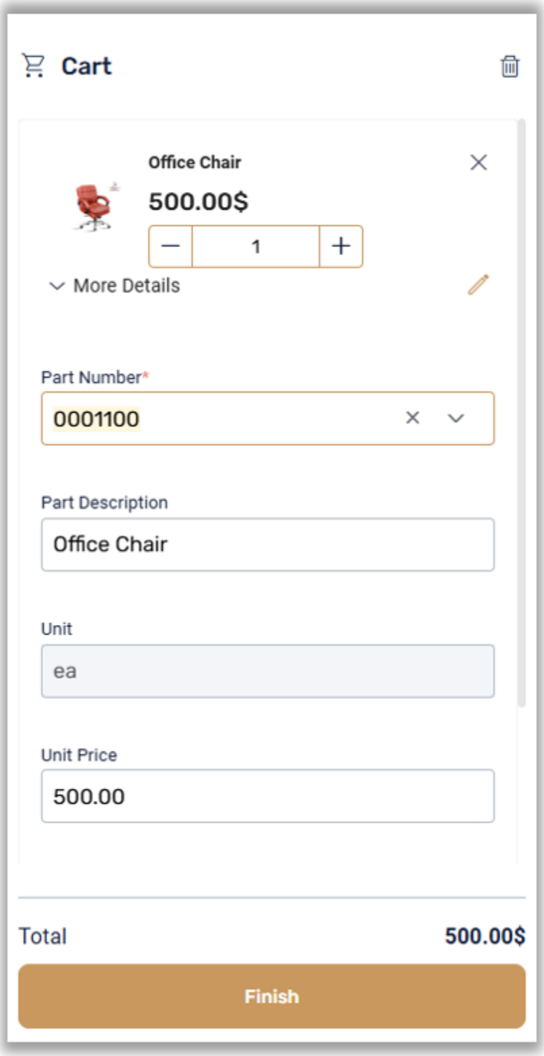
For more information, see the SOP.

Portals

- **Guided flows in portals** – In addition to the existing option for individual forms, now, for a whole portal or specific menu, you can create a guided flow; a structured, step-by-step experience that walks users through any process clearly and completely, from start to finish.
- **Log in on behalf of a customer or vendor** – Contacts who work on behalf of more than one customer or vendor can select the customer or vendor account when logging in. Customer Request New Behavior
- **Contextual help for portal forms** – Add help text to forms, and individual fields or grouped fields (categories) in your portal using the Portal Generator. For example, in a **Sales Orders** form, you can add your own explanation for how to fill in each field in the different categories. Customer Request



- **Additional information in shopping carts** – You can now add more details to the shopping cart summary area, so you can see not only the total price of items, but any information you choose from the order, for example, price before discount and price including tax.



- **Payment preauthorization** – Preauthorize payments and pay for orders through BlueSnap. Customer Request
- **Terminology change** – To make online store management features easier to navigate, the term **E-Commerce** has been replaced with **Web Ordering** across related menus and forms.
- **Send or display the portal link** – You can now choose if you want to send a link to the portal to an email address or to display the link to the user. You no longer need to link an email account to receive the link.
- **Portal data privileges** – A new option lets you control whether a contact receives only the data they are personally linked to, or all data belonging to their customer or vendor.

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

Priority

POD

- **Create return documents from shipment documents** – Creating return documents just got easier for delivery drivers. When items need to be returned during delivery, drivers can view all shipped items directly from the shipment document and mark which items were not delivered. The system automatically generates the return document with the correct quantities and details, eliminating the need to manually search for parts and enter information. Customer Request
- **Driver remarks on shipping documents** – Define that driver remarks will appear on the shipping document next to the consignee signature, and not only in ***Priority***. Customer Request
- **Track delivery drivers** – Track drivers based on their in-app activity (loading, unloading) or by defining scheduled time windows for automatic location updates. Customer Request
- **Delivery document scanning during loading** – You can now add an extra verification step to the loading process: in addition to scanning packages, the driver will be required to scan the shipping document number itself, to ensure all printed documents have been collected before departure. Customer Request
- **Consignee signatures on all pages** – Consignee signatures will appear on all pages of the shipping document, and not only on the first page. Customer Request
- **Clear login messages** – Now login messages are more specific, giving you a better understanding of what needs to be done. Customer Request

Field Service Application

- **The Field Service app is here** – Everything a field technician needs, in one cross-platform app (iOS/Android) for cloud and on-prem customers.

  From the moment a technician opens the app, their day takes shape: a full list of open service calls, an interactive map, and all the customer and fault details they need before they even knock on the door.

  On the call, they update repair types and status, manage parts, log hours, complete questionnaires, and close out with a digital signature.

  They can annotate photos directly in the app, marking up images to document issues clearly without stepping out of their workflow.

The app keeps working even without connectivity, synchronizing everything automatically when the network returns.

Financials

AI-Powered Reconciliations aiERP

- **AI-assisted bank, account, and credit card reconciliations** –

  Close more reconciliations in less time.

  New AI capabilities deliver more accurate proposals, helping you increase your match rate and significantly reduce manual work.

  AI-powered and automatic proposals for all reconciliation types (bank, account, and credit card) are now consolidated in a single form. Each proposal is ranked by confidence level, includes a clear explanation, and displays data from both sides side by side, so you can review and decide in seconds.

  Approve or reject multiple proposals at once and move through your reconciliation queue faster.

  What you get:

  – More matches closed automatically

  – Less manual review

  – Faster processing times

  – A more accurate and efficient workflow

  In addition, navigation has been improved: proposal forms are now available under a new dedicated menu, and the program has been renamed **Automatic Recon Proposals** for direct access to the main form.

  This feature is available for ***Priority*** cloud customers. For more information, see the SOPs:

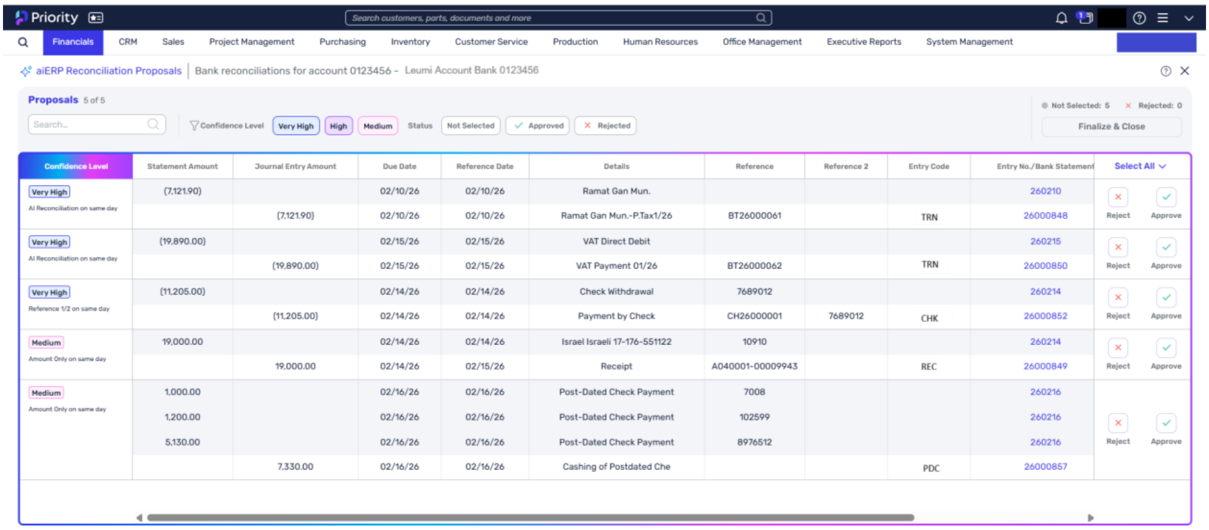
  – Bank Reconciliations

  – Account Reconciliations

  – Credit Card Reconciliations (Traditional Payment Processing)

  – Credit Card Reconciliations (Priority Payments)

Priority



- **Canceling pending reconciliations** – You can cancel automatic reconciliations (proposals made by the **Automatic Recon Proposals/aiERP Reconciliation Proposals** program) using the **Cancel Pending Recon.** program by marking the **Only Cancel Proposal** checkbox.

  In addition, for your convenience, we added the **Cancel Pending Recon.** program to the **Bank Recon. Work Area (Split)** form.

General

- **Sales order line status tracking** – Automatic status updates for order lines based on changes in related financial documents. Define which documents and statuses will affect updates - without manual errors.
  Customer Request

  For more information, see the SOP.

- **Zero-amount invoice journal entry lines** – When creating an invoice with an amount of 0, a journal entry line with an amount of 0 will be recorded for the customer/vendor, so that the record appears in the customer/vendor ledger.
  New Behavior

- **Separate numeration for financial documents by additional classification** – Define a separate numeration template for financial documents on another classification level.

- **Cashiers** – For Priority Retail customers working with cashiers: The password policy feature also applies to cashier users, in addition to other users.

Localization Enhancements

Global

- **ShipEngine**

– Ship goods directly from the **Sales Invoice** form using the ShipEngine interface, just like you already can with customer shipments. This includes receiving carrier rate quotes, generating shipping labels, and tracking packages without creating a separate Customer Shipment document. Customer Request

– Create courier labels and track shipments directly from the **Packing Slip** form using ShipEngine. When you create the shipping document, the labels will already be on the crates. Customer Request

Europe

Belgium

- **Flowin inbound e-invoicing**

  – **Automatic e-invoice loading** – Use the new **Load Flowin Vendor Invoices** program to automatically load electronic invoices from vendors.

  – **Load invoices manually** – The **Import XML Invoice-Belgium** program identifies the vendor invoice details based on previous documents (purchase orders and GRV documents), and part numbers as they appear in the system. These updates also apply to the automatic program. Customer Request

- **Update and delete account details in Flowin**

  – Use the new **Register/Update Account – Flowin** program to update your company's details in the Flowin registration. For example, to update vendor information from the initial registration, or to automatically load electronic invoices from suppliers.

  – You can also delete your company's registration details using the new **Delete Account in Flowin** program.

- **Peppol**

  – We added support for flexible, standardized identification of customers and vendors in Peppol, including alternative identification schemes such as GLN (0088), Company Number (0208), and VAT Number (9925). The system automatically detects Peppol registration, reducing the need for manual maintenance.

  – We added support for credit invoices (Storno) in the generation of electronic customer invoices.

– You can enter an order number and sales order number in dedicated fields so that they appear in the electronic invoice, in accordance with regulatory requirements.

– We added OGM support for outgoing electronic invoices. OGM (Structured Number) is a standardized number in Belgium that helps automatically match payments to invoices.

For more information, see the **Electronic Invoices – Belgium** SOP.

Italy

- **VAT Reporting** – The **VAT Register - Italy** report includes a summary table for the entire reporting period, showing the total data for all months at a glance without requiring manual calculation. Customer Request

Israel

Integration with the Tax Authority

- **Payment installments** – To comply with the Tax Authority's new regulation, you can select the number of payment installments for spreading tax payments in the **Submit VAT Digitally-Fiscal Rep.** program.

- **Minimum threshold update** – To help our cloud customers comply with the regulation, we added a reminder to run a dedicated program that automatically updates the minimum threshold for receiving invoice allocation numbers.

  For more information, see the SOP.

Payroll System – Israel

- **Payroll Management, Elevated**

  We are changing the way payroll accountants work, and the experience employees receive. This version introduces significant enhancements that make ***Priority***'s Payroll module more advanced, intelligent, and efficient.

  – **Payroll Portals** (for companies on ***Priority***'s cloud)

    - **Coming soon: EasyBoard – New employee onboarding, in one click** – EasyBoard lets new employees independently complete every step of the onboarding process: filling in their details, submitting Form 101, and uploading supporting documents, before their first day of work. The payroll accountant gets a real-time, complete picture, with all details flowing directly into the system and no duplicate manual entry. The result: a more organized, faster, and accurate onboarding process.

    - **Workspace Portal – Everything employees need, in one place** – Employees get full, convenient access to all their payroll data: viewing pay stubs, downloading documents, and getting information independently, anytime, from anywhere. Workspace Portal centralizes everything in one place, letting employees act without depending on the payroll team. The result: more transparency, more control, and a simpler employee experience, alongside a reduced workload for the payroll team.

- **AI Agents for payroll** (for companies on ***Priority***'s cloud) – Payroll accountants can now work faster, more focused, and more accurately, with AI Agents that guide them through complex processes requiring deep expertise, time, and concentration. The AI Agents support payroll accountants at various stages of the payroll process and enable faster, more accurate decision-making, with the accountant approving final actions at each step.

  The following Agents are available in this version:

  – Employee Onboarding Agent
  – Absence Management Agent
  – Maternity Leave Agent
  – Ongoing Salary Updates Agent
  – Provident Fund Updates Agent
  – Payroll Knowledge Agent

- **Performance improvements** – System performance has been upgraded across key processes for faster, more efficient day-to-day operation.
- **Accrual excluding overtime** – Calculate eligibility for absence days and convalescence leave based on paid hours only, without overtime hours. This provides more flexibility when calculating employee entitlements.
- **Report to calendar month** – Mark payroll reports to post to the calendar month instead of the attendance month. This ensures reports appear in the correct pay slip when your attendance month does not align with the calendar month.
- **"Hargal" update** – Updated the file structure of the attendance data interface according to the "Hargal" system.

Payroll Regulation Updates - Israel

- **Employee donation tax credit interface** – Employees can receive tax credits for charitable donations directly through their pay slip, thanks to a new integration with the Israel Tax Authority.

- **Tax credits for reservists** – We added the option to update the number of army reserve days served in the previous year, to qualify for tax credit points for reservists.
- **Sick day calculation based on 30 days** – Monthly salaried employees can have their sick day value calculated based on a 30-day month, providing a simpler and more consistent calculation method. When enabled, all reported sick days, including Fridays and Saturdays, are counted toward sick day usage and deducted accordingly.
- **Vacation accrual for reserve duty days** – Employees earn vacation days during reserve duty service, ensuring they do not lose vacation entitlement while serving.

Inventory Accounting

- **Initialize inventory posting in general ledger** – The new **Set Params-Manage Inventory Acct** program helps you quickly set up all the required settings for the **Post Inventory Accounting Entries** process. It guides you step by step, reducing the risk of errors and simplifying system setup.

  With this program, you can:

  – Verify that all required accounts are correctly defined according to your posting method

  – Add any missing accounts

  – Set the necessary financial constants

  – Choose and apply the posting method for all inventory transaction documents in one place

  This tool ensures your inventory accounting setup is accurate, consistent, and easy to manage.

Costing

- **Enhanced support for Specific Identification (lot/work order level)** –

  – Manage costing by specific identification with the new financial constant **LotWOCostPeriod**. This constant allows you to define the duration (in years) during which inventory transactions associated with a lot or a work order will continue to inherit their cost from the original inventory transaction that created the lot or work order.

  – In addition, the cost of inventory transactions for lots or work orders created through various types of inventory transactions will be calculated based on the specific cost of the lot or work order itself, without reverting to the product's average cost.

- **Rejected quantity handling in work order costing** – A new parameter on the **RejectMove** production constant lets you control how rejected quantities are handled during production reporting. When enabled, rejected quantities are treated as scrap and recorded without generating inventory. Their production costs are reallocated to the Goods quantities in the same work order, ensuring full cost absorption.

Supply Chain Management

Advanced Delivery Planning Module (ADP)

- **More details in the delivery tracking document** – We added more information to the delivery tracking document so you can see the summarized weight, volume, price, and quantity of the sales orders, separately from the shipping document. Customer Request
- **Vehicle type validation for route optimization** – When marking a vehicle for optimization in the **Transports** form, users will receive a notification if they do not specify a **Vehicle Type Code**. This ensures the optimization engine has access to the vehicle's capacity (volume and weight limits) required for proper route planning.
- **Manual delivery time windows** – Set delivery time windows manually. Time information stays synchronized across all forms automatically and complete orders with mixed delivery times are clearly marked.

Inventory

Warehouse Management (WMS)

- **Shipment task reporting in WMS mobile app** – The WMS mobile app supports comprehensive shipment (SHP) task management, enabling warehouse teams to efficiently manage the shipping stage of the order fulfillment process.

  Key capabilities include:

  – **Create target documents for multiple customers** – Process shipments for multiple customers in a single task instead of handling them one at a time.

  – **Link documents to Delivery Tracking Documents** – Add inventory documents to Delivery Tracking Documents, streamlining the handoff to delivery operations. Once linked, continue the distribution process seamlessly using the POD app.

- **Identify documents using external label numbers** – Use label numbers (external document numbers) to identify documents, making it easier to track shipments using customer-facing references.
- **Create and load shipping pallets** – Use the SHP task to create shipping pallets as needed. Once you have a shipping pallet, whether created during the task or beforehand, simply scan the shipping pallet number to add all items on the pallet to the Delivery Tracking Document.

- **Enhanced barcode parsing** – The barcode scanning process recognizes a wider range of part identifiers when using barcode parsers. The system can now identify parts through customer-specific barcodes and supplier part numbers. Customer Request

Production & Assembly

- **Work order number assignment for warehouse assembly (manufacturing system)** – Assign work order numbers to products assembled through warehouse processes (non-production routings). This improves traceability, and expiration date management, and enables recall handling for warehouse-assembled products.

MRP and Purchase Planning

- **Intercompany planning processes** – Organizations that operate with multiple companies that have a vendor-customer relationship and use the MDM module can now perform intercompany planning:
  - **Intercompany sales orders** – The system now identifies supply demands for parts managed by other companies in the organization and automatically generates sales orders in those companies as part of planning. This capability improves visibility and synchronization across companies while enabling more efficient coordination between planning and supply. Customer Request New Behavior
  - **Intercompany stock transfer orders (STO)** – Planning now considers inventory held by other companies in the organization and automatically creates intercompany stock transfer orders when the supply originates from another company. The created stock orders are automatically included in the planning of the company holding the inventory.

  See the SOP for more details.

- **Forward planning** – Planning processes support forward planning to generate achievable work plans. When scheduling certain work orders to the required delivery date is not possible, you can use the new **Reschedule from**

Today field in the **MRP Definitions** form to configure the system to automatically reschedule those work orders using forward planning during the MRP run.

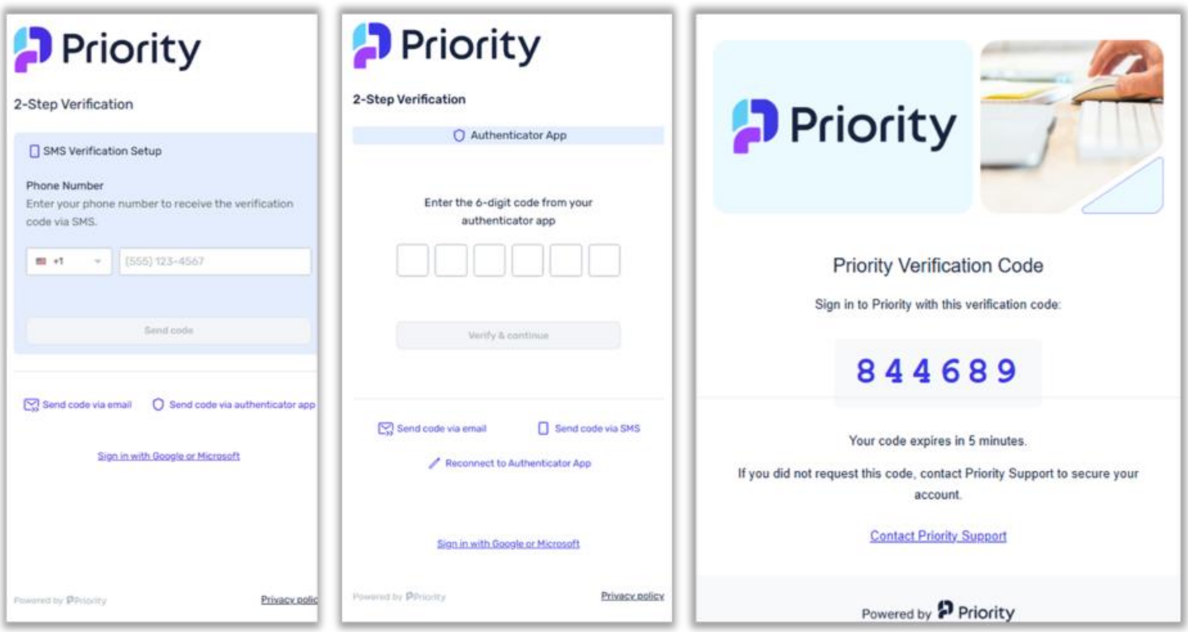
- **MRP performance and stability** –
  - **MRP work plans** – In this version we upgraded system performance for the MRP work plan generation process, delivering a faster and more efficient user experience.
  - **Planning processes in MRP for distributors** – The **History of MRP Runs** form is now available for the Commercial system. Users can compare total execution times across different MRP runs, analyze the time distribution among components within each run, and view the parameters of each MRP run. The form provides enhanced visibility, monitoring, and control of MRP performance, enabling identification of bottlenecks, and improving planning process stability.

SaaS

- **2-Factor Verification** – We expanded the 2-factor verification capabilities for Priority Accounts users who sign in with email and password, in line with leading SaaS standards. You can choose from three verification methods: email, SMS, or an Authenticator application. This applies to all Priority Account services, including portals, document approval via email, and additional services. Cloud customers can already work with this new capability, as part of a gradual rollout.

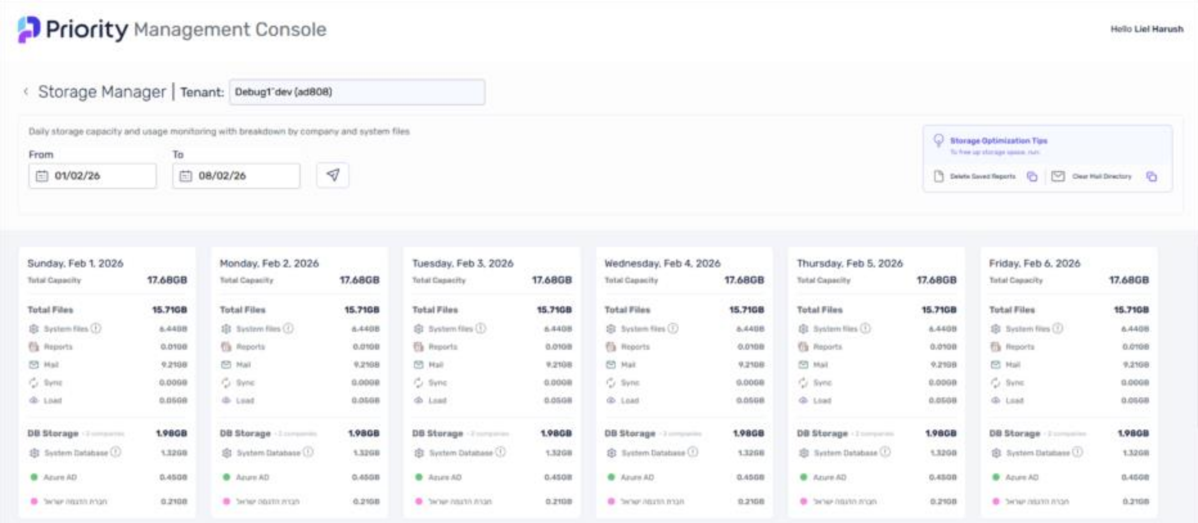
  For full information on the setup and management process, see the SOP.

  New Behavior



- **Management Console Storage Manager** – The Priority Management Console now includes a Storage Manager, giving you full visibility into your cloud storage usage. You can view a breakdown of system files and company databases, track daily storage consumption, and get built-in recommendations for optimizing storage, such as cleaning saved reports or mail folders.

  This feature is only available to companies on ***Priority***'s cloud.



- **External Applications: Client ID and Secret for Priority Accounts** –

  When using Priority Accounts with external applications, you can obtain a Client ID and Client Secret directly from the **External Applications** form by marking the **Register in Connect** checkbox. This allows you to register the application in ***Priority*** and authenticate as a ***Priority*** user within the external application.

  Before registering, you can define a company logo and background to personalize the login screen for your organization.

  For more information, see the SOP.

System Administration

- **Delete old document attachments** – A new procedure helps you free up storage space by deleting old attachments linked to documents (invoices, shipping documents, etc.). You can define a minimum retention period (for example, 7 years), to meet legal requirements for retaining historical data as required by the authorities, ensuring that recent and legally protected files are never deleted.

  You can select up to which date to perform the deletion, and which type of attachment to delete, for example, financial documents, sales orders, purchase orders, price quotations, and more.

  Only attachments older than the defined period can be deleted. The deleted attachment line in the **Attachments** form will be marked as deleted. Available for system administrators only. Customer Request

- **Restore from backup: support for different decimal precision** – You can restore data from a backup taken from a system with lower decimal precision to a system with higher decimal precision. For example, if your system uses 3 decimal places and you restore from a backup with 2 decimal places, the system will automatically adjust quantities and prices as needed. Customer Request

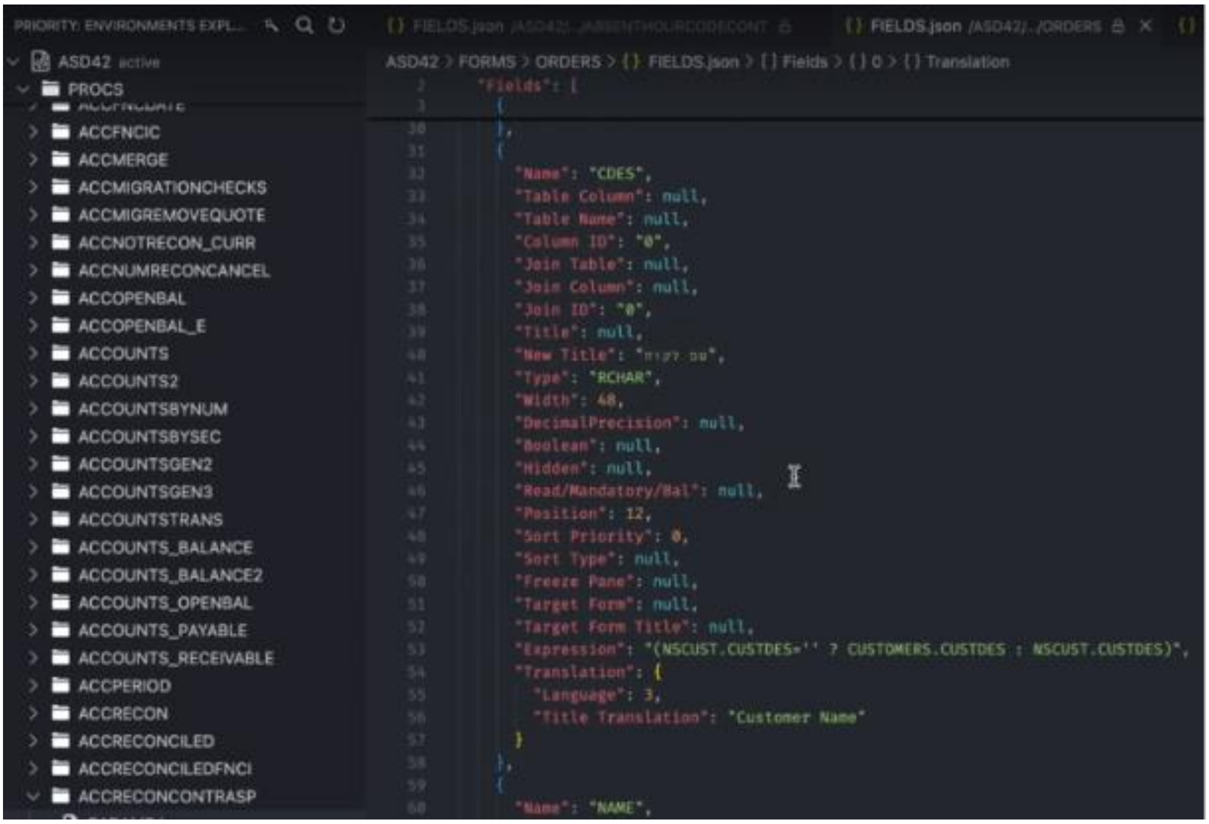
- **Choose to send or display links** – Choose to send links to mobile applications, portals, and APIs to an email address, or to display the link to the user. You no longer need to link an email account to receive the link. Customer Request

- **Bin version logs** – We added documentation for Bin versions updated in the system. These logs appear in the **Installed Revisions** form.

Developer Tools

VS Code

- **Enhanced field metadata for forms and procedures** – Forms and procedures now include comprehensive field metadata including join definitions, expressions, target form references, and translations. This enhanced metadata provides developers with deeper insight into form structure and field relationships directly in VS Code.



API

- **New API call** – We added a new API call to retrieve the username of the user working in the system:

  GET serviceRoot/GetLoginName

  This is especially helpful to identify the user signing in to ***Priority*** through an identity provider such as Priority Accounts (SSO), and not a username and password, so you can filter data by user when needed.

- **Webhooks extended URL address** – The **Webhooks Definitions** form includes 2 additional URL fields, allowing you to enter longer Webhooks URL addresses. Customer Request
- **Error logs for Webhook rules** – Webhook rules in Business Rules and BPM create error logs in the **Webhooks – Error Log** form, which helps you identify and fix errors more easily. The form shows the errors received in the past week. Customer Request
- **Entity names in license error messages** – For users working with connectors from our Marketplace and/or ***Priority*** applications: For enhanced clarity, error messages for entities that are not part of the application license will display the entity name instead of a generic message.

For more information, see the Developer Portal.