

Priority Release Notes v23.1

Version 23.1 includes many new releases, among them:

- [Priority Analytics](#)
- [New Home Page look and feel](#)
- [VS Code plugin development tool](#)
- [Offline mode in Priority Mobile questionnaires](#)

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

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User Interface

Our rebranding story

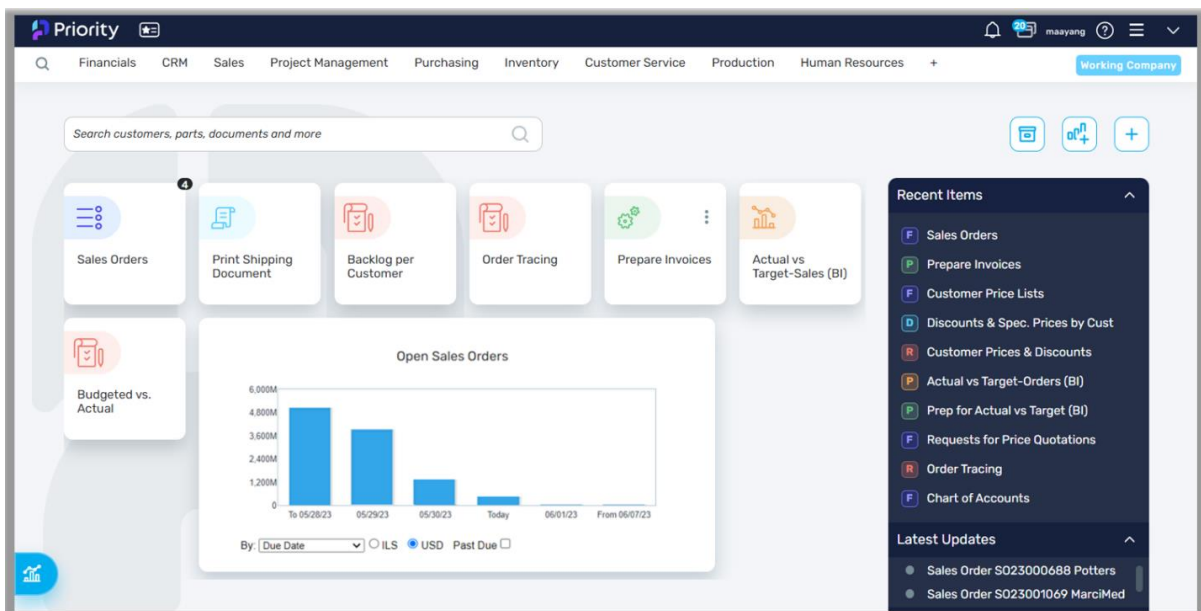
We are excited to announce a new design, including a brand-new **Priority** logo, login page, and home page, for a more modern, clean look and feel.

Working in your **Priority** home page is exactly the same - it just looks way better.



- **New home page look & feel**

Your new home page features a new, bright, and intuitive design, with attractively redesigned colors, fonts, and more, providing an updated user experience that aligns with the overall **Priority** rebranding.

Check out your new home page look:



- **New experience for document attachments and history**

Now you can enjoy a new, intuitive experience with upgraded functionality for document attachments and history. Found in a single, easily visible location, on the right side of your document, you will see both the new **Attachments** button  and the new combined **History of Statuses** and **History of Changes**  button.


Click the **Attachments** button to open the window and drag and drop attachments directly into the document.

In addition, you can easily view, add, delete, rename, or download attachments. You can tag attachments as read-only, or as not to send out with the document.



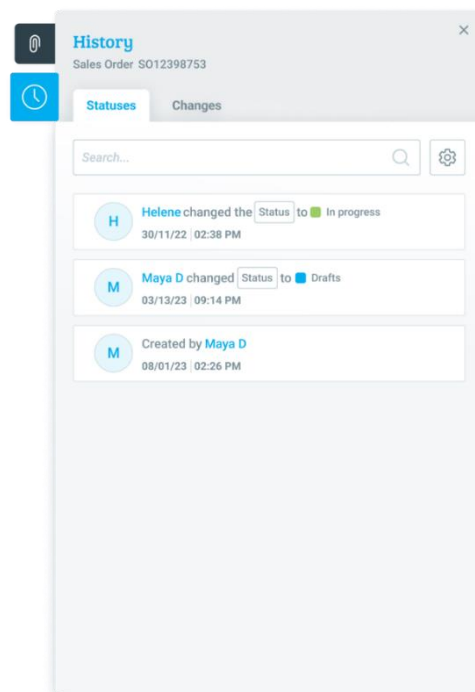
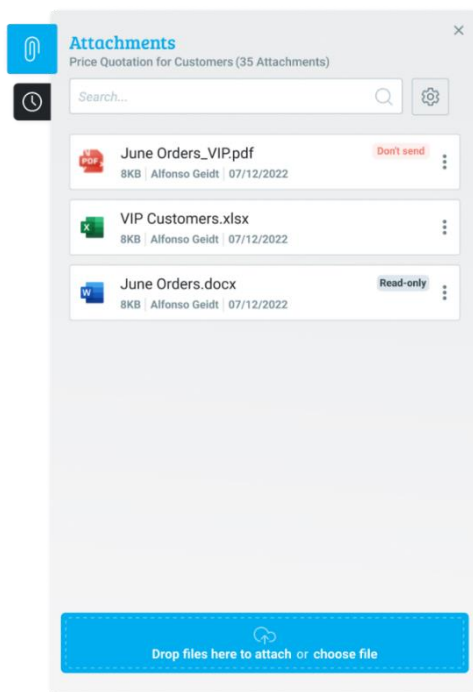
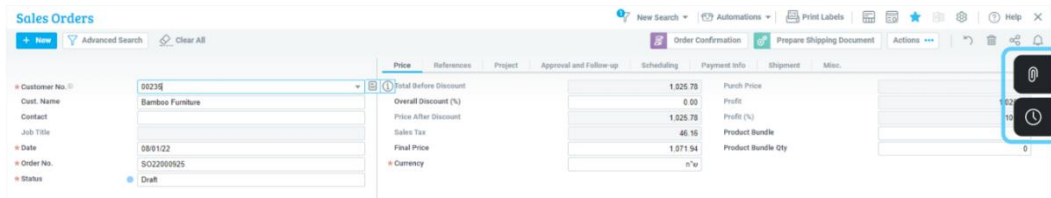
Click on the **History** button to view your document's status or changes history.

Under the **Statuses** tab, you can view which users updated the document's status, and under the **Changes** tab, you can see which users updated other data in the document.


Use **Settings**  to personalize your windows by choosing which type of information you want to appear.

You can find your existing information in the new windows and in the **Attachments**, **History of Statuses**, and **History of Changes** subforms, right where you left them. Gradually, we do plan to take out the subforms.

New Behavior



We continue to invest in our platform to give you the best experience. Looking towards the future, you can expect even more advanced features and functionality shaping **Priority** to your business needs.

- Getting the help you need** - Using the various help tools we offer in **Priority**, you can easily and effectively find any help you may need in the system. The Helpbook, found in every document in just a click on the  **Help** button, includes the most relevant video clips, SOPs, and FAQs, when you need it - where you need it. Following our announcement in version 22.1 about the upcoming removal of the Wizards, as of version 23.1, we invite you to use the Helpbook for all your system help needs. Of course, we carefully moved all the relevant information to the Helpbook, available since version 22.1.

Priority Analytics

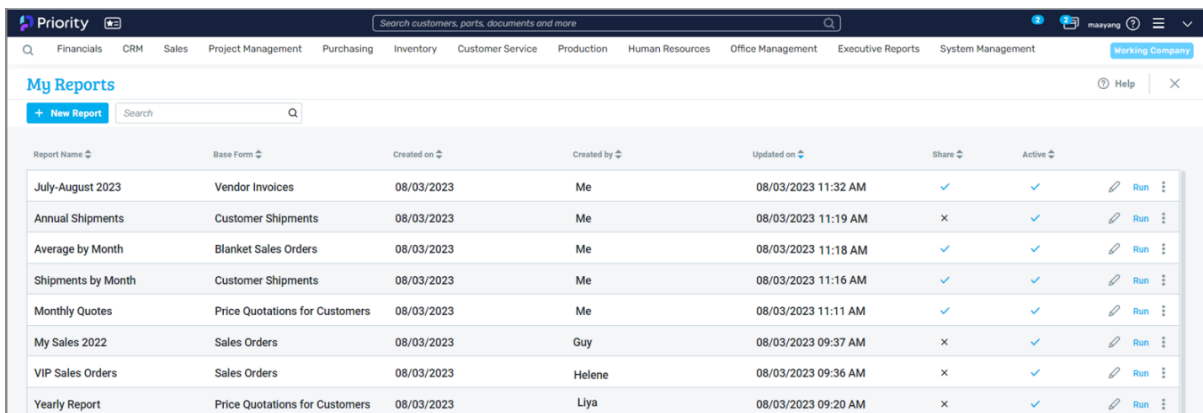
We are proud to announce **Priority Analytics** - a new, intuitive, and easy way to create reports.

Using new, innovative technology, now all users can build reports that include combined data from different modules and areas in **Priority**, helping you analyze and evaluate information, so you can make data-driven decisions.

This upgraded and flexible experience allows you to build a report by choosing fields from a variety of forms; standard and customized.



The new Analytics icon takes you from the home page to the new **My Reports** area, where you can view reports you created, reports shared with you, and perform actions, like building new reports, editing existing reports, and running reports.



Report Name	Base Form	Created on	Created by	Updated on	Share	Active	
July-August 2023	Vendor Invoices	08/03/2023	Me	08/03/2023 11:32 AM	✓	✓	Run
Annual Shipments	Customer Shipments	08/03/2023	Me	08/03/2023 11:19 AM	✗	✓	Run
Average by Month	Blanket Sales Orders	08/03/2023	Me	08/03/2023 11:18 AM	✓	✓	Run
Shipments by Month	Customer Shipments	08/03/2023	Me	08/03/2023 11:16 AM	✓	✓	Run
Monthly Quotes	Price Quotations for Customers	08/03/2023	Me	08/03/2023 11:11 AM	✓	✓	Run
My Sales 2022	Sales Orders	08/03/2023	Guy	08/03/2023 09:37 AM	✗	✓	Run
VIP Sales Orders	Sales Orders	08/03/2023	Helene	08/03/2023 09:36 AM	✗	✓	Run
Yearly Report	Price Quotations for Customers	08/03/2023	Liya	08/03/2023 09:20 AM	✗	✓	Run



Select Fields

Sales Orders

- Address for Inv-Desc
- Address for Invoice ([List of Customer Sites](#))
- AdvancePaymt Balance
- Approved
- Assigned to ([List of Users](#))
- Attachments?
- Base Rate
- Bill in ServContract
- Billing Period
- Bin

Selected Fields (9) ? Help | x

Customer Number	Sales Orders X
Customer Name	Sales Orders X
Date	Sales Orders X
Order	Sales Orders X
Part Number	Order Items X
Part Description	Order Items X
Quantity	Order Items X
Total Price	Order Items X
Purchase Price	Part Catalogue X

You can also define advanced report settings like sharing the report and defining the report as a multi-company report. You can set report column definitions to group specific data together, to sort data, aggregate calculations for columns, and add expression columns for advanced calculations.

In the **My Reports** area you can find the reports you already built in the past from the User Report Generators and continue running them only. To benefit from the new and advanced functionalities that Priority Analytics has to offer, we encourage you to rebuild them in Priority Analytics. Gradually, we do plan to take down the report generators. Of course, we will give prior notice.

See the **Priority Analytics SOP** for more details.

Priority Mobile

- **Offline mode** - Working in an environment without a steady internet connection? Now you can access Priority Mobile wherever – whenever.

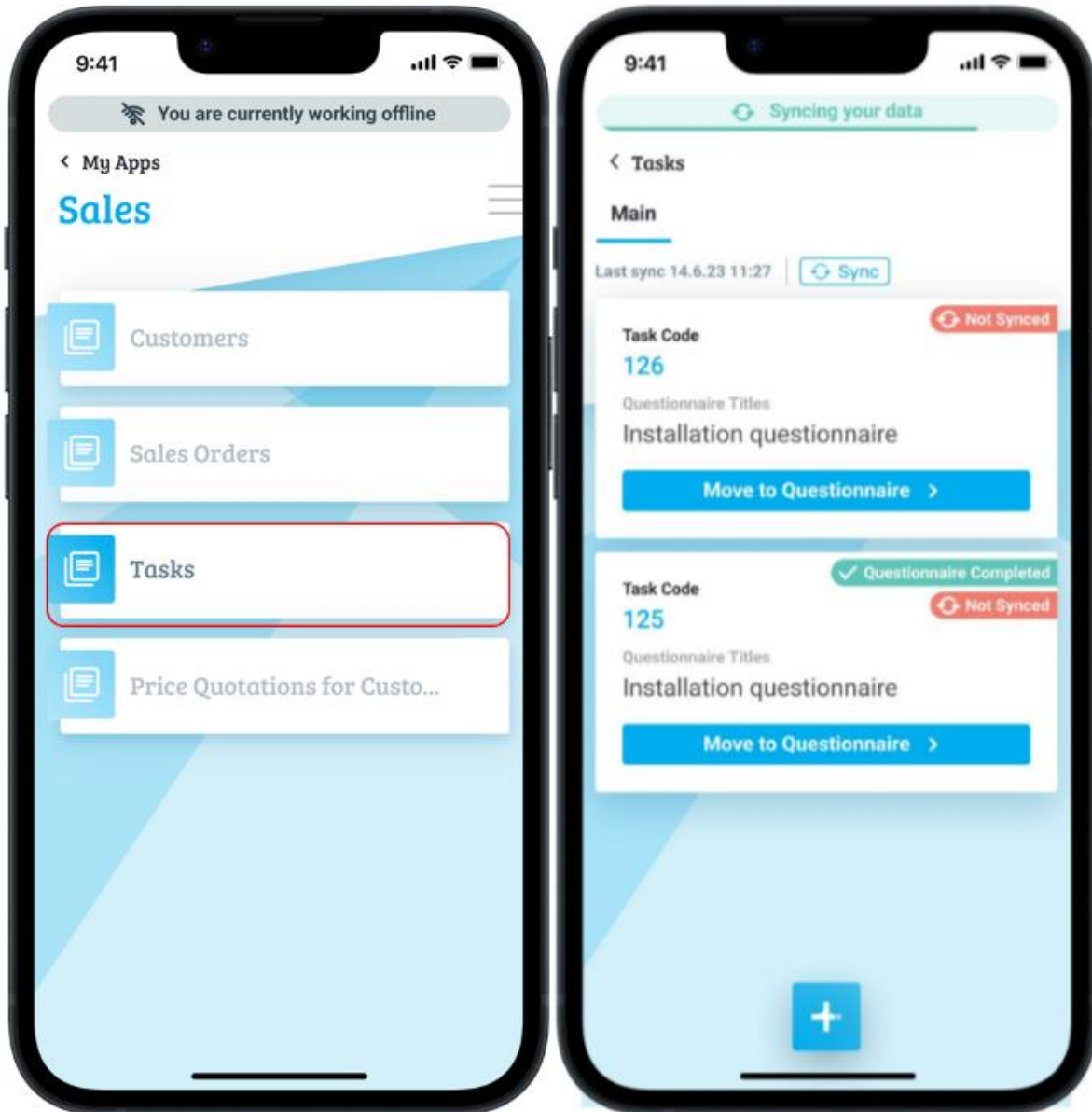
We have now added support for working in Offline mode from Priority Mobile. This new functionality is especially useful for employees that work in places without a strong internet connection, or without any connection at all, like in warehouses, elevators, or industrial refrigerators.

For example, an elevator technician installing a new elevator might not have a strong internet connection. Throughout the installation, the technician can now fill in the installation questionnaire, and when he finishes and exits the elevator, all the data will update automatically in **Priority**. This way, the



technician can fill in the installation questionnaire in real time, without losing any information, and promptly move on to the next task of the day.

Offline mode merges seamlessly into every process in **Priority** by using **questionnaires**, with a new intuitive and advanced mobile look.

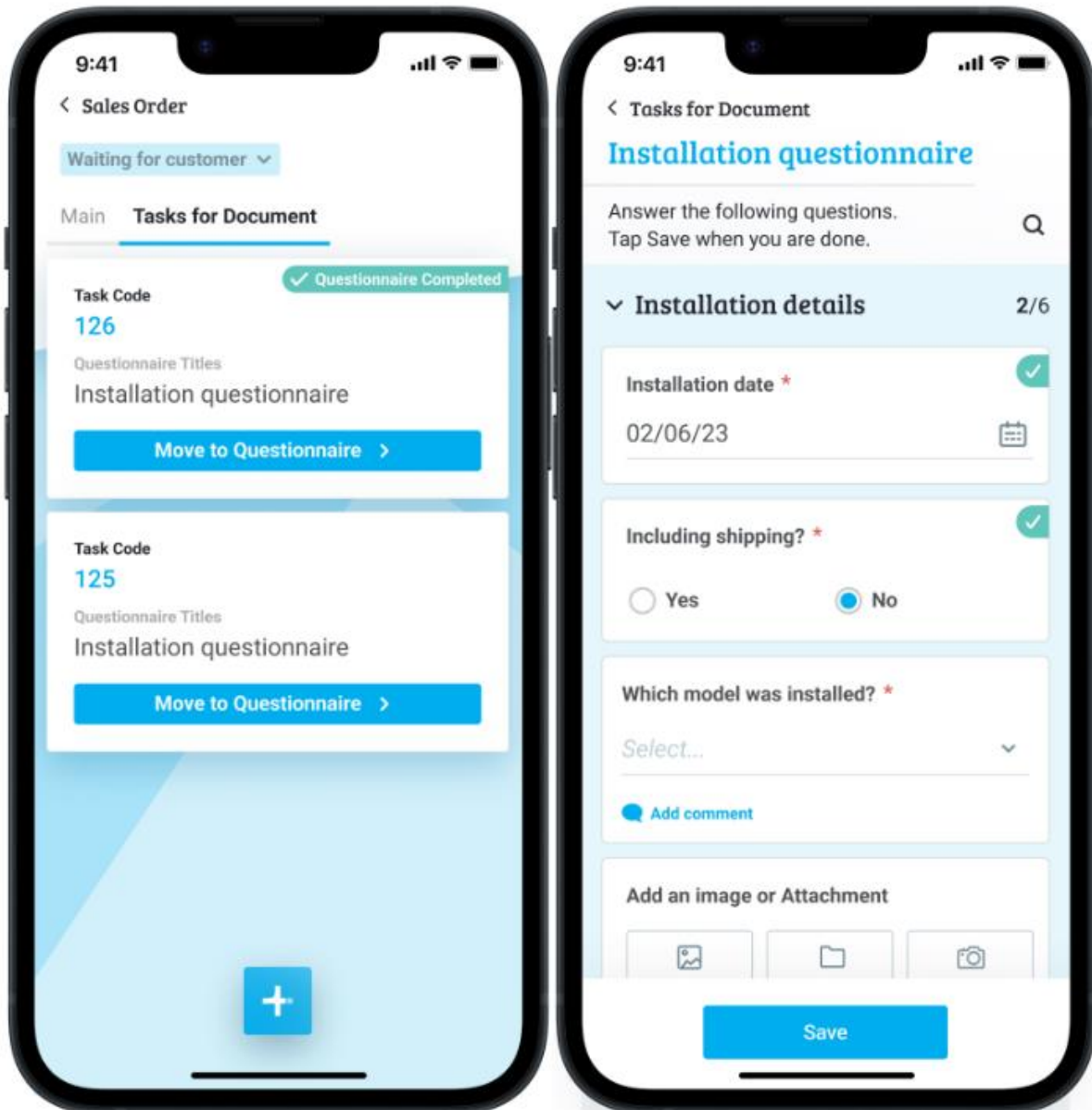


- **Working with questionnaires** – Now you can enjoy a flexible, quick, and intuitive questionnaire experience on your mobile device. For example, a kitchen installer arrives at the restaurant to install some new appliances. During the job, he fills in details regarding the installation and appliance models he installed. He attaches pictures of the parts and adds remarks regarding some missing pieces and customer remarks. He does all this using the new mobile questionnaire, allowing you to gather and add the data you need to the relevant documents in **Priority**.



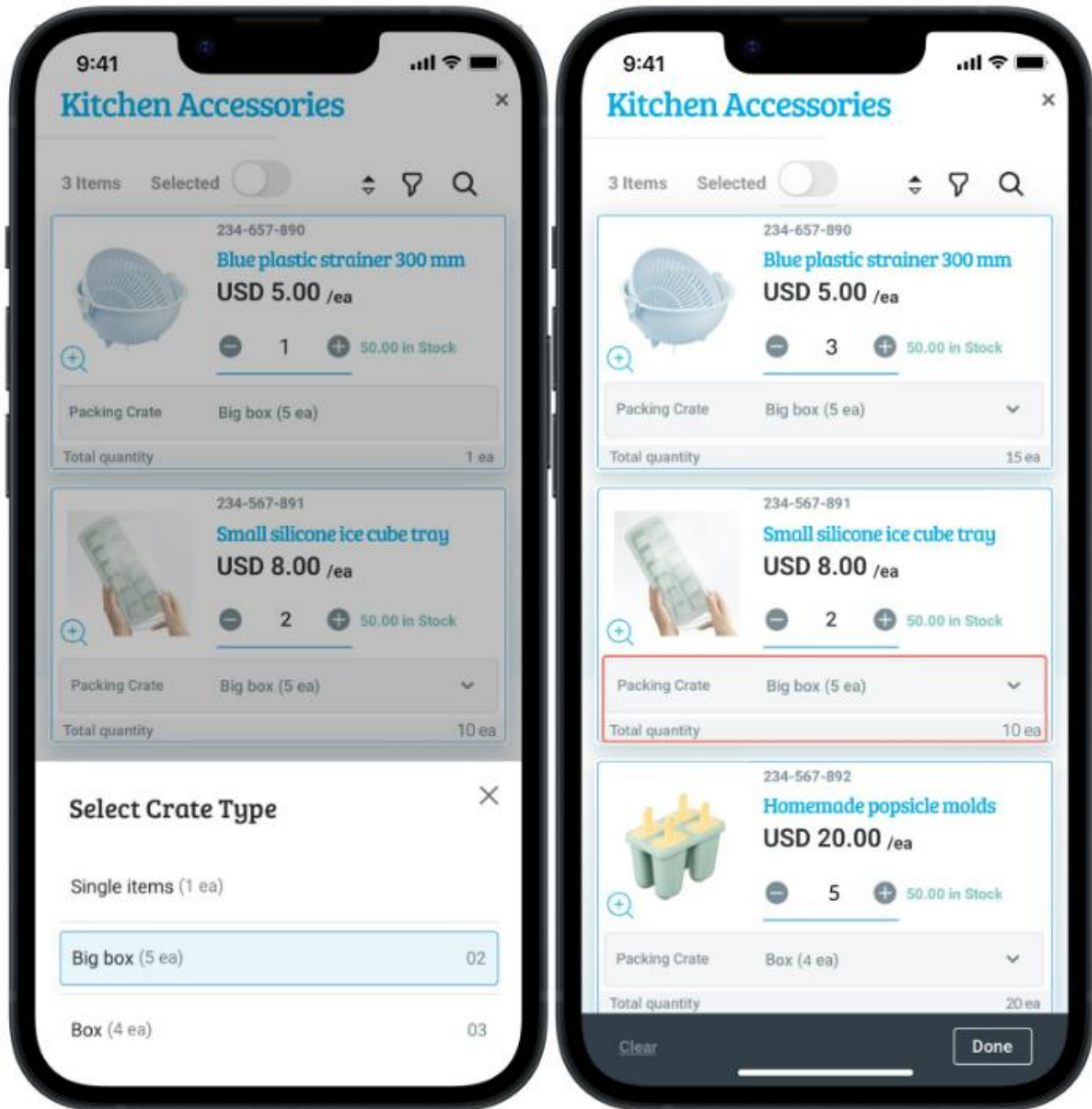
The installer will see markers regarding his progress, according to the question category and for the most crucial questions.

As you know, you can create questionnaires and link them to almost every business process in **Priority**, as a task or customer survey.



- **Working with catalogues** - We expanded mobile catalogue capabilities and added support for working with crates. In the catalogue you can choose a quantity of crates instead of individual parts, and the final part quantity will update accordingly. **Customer Request**





See the Application Generator [SOP](#) for more information.

The above 3 capabilities are included in the Premium Application Generator package and are not available in the Basic Application Generator.

- **Mobile rebranding** - The mobile experience has also been improved with a new and exciting design. We invite you to check out the new Priority logo, icon, and login screen.





- **Terminology update** - We changed the **Clone Application** program name in the Application Generator to **Duplicate Application** to better suit its functionality.

Financials

Reconciliations

- **Save reconciliation searches and filters** – When you run a search, sort, or filter fields in any of the split reconciliation forms (account, bank, and credit card), your information will stay as you organized it, even after performing any of the actions in the form.



- **Automatic reconciliations** - Following the addition of the financial constant **PostReconPeriod** in Version 23.0, allowing you to define how reconciliation entries behave when posted in a closed fiscal period, we have now removed the input concerning the same subject from the **Automatic Reconciliation** program, and it will refer instead to the same financial constant.

New Behavior

General

- **Partial receipts** - We added the option to create partial receipts directly from within invoices. Therefore, we introduced a new print format to show the amount of the invoice, the amount partially received, and the amount due. This is particularly useful when your business makes over-the-counter transactions by receiving a partial amount upfront.
- **Definitions for copying remarks** - In continuation from version 23.0, in which we added support for the way remarks are transferred between documents in the supply chain in **Priority**, now you can control the remarks that appear in the different financial documents in the system: the order in which they appear, the priority of the remarks, and more. As with the supply chain documents, use the **Definitions for Copying Remarks** form.
- **“Z” Journals** - A journal becomes a “Z” if its posting process terminated abruptly. We added functionality to allow any user to finalize the posting of such a journal, after 24 hours have passed from the initial posting attempt. We also clarified the error message regarding Z journals in the Check Journal Entries report. **Customer Request**
- **VAT posting journals** - We changed the reconciliation behavior of a canceled VAT posting journal. From now on, such a journal will reconcile with its canceling journal. **Customer Request** **New Behavior**

Designated Solutions for the International Market

Global

- **E-invoicing** - We are now offering e-invoicing integration capabilities in multiple countries in the world, based on our technology partnership with Avalara, a world leader in compliance and taxes. For more details, see the [SOP](#). To start using this service, please open an account with Avalara first at: <https://www.avalara.com/us/en/get-started.html>.
- **Multi-shipment invoices** – As we continue to increase support for a variety of localizations, we are focusing our efforts on improving and developing support for financial regulations in other countries. These capabilities and



future ones that we will add will not include export invoice documents not designated for use outside of Israel.

Now, the default **Invoice Type** setting for a new customer opened with a currency that differs from the company's local currency, for a company operating outside of Israel, will be "**C**" - **Multi-Shipment Invoices**.

New Behavior

North America

- **Sales Tax** – Now you can calculate tax with Avalara for customers or shipping addresses in Puerto Rico.

Canada

- **CAFT Payments** – We added the ability to export payment files in the CAFT format, widely accepted by banks in Canada. This format will be the default output option of the standard ITP process while working in a Canadian company. For more details, see the [SOP](#).

As part of adding support for CAFT payments for Canada, we also updated the **Flag Bank Transfers for ACH** form to **Flag Bank Transfers for ACH/AFT**, and the **Run Interbank Trans Proc-Payables** program to the **Vendor Payment Interface**.

Europe

- **Recycling Tax** - We added functionality to support recycling tax requirements in Europe, and we now offer a "best practice" flow using the enhanced Product Bundles functionality described in the **Sales** section of [Supply Chain Management](#). See the [SOP](#) for more details.
- **Packaging materials** - **Priority** helps organizations meet their sustainability requirements and goals. The existing forms for detailing packaging materials are now available for outgoing documents as well as incoming and production documents, and the reports reflect packaging reported for all types of documents.

Therefore, we renamed the **Received Packages Details** subform to the **Packaging Material for Decl** subform to better fit its functionality.

This subform is now found in the following forms:

- **Sales Invoices > Invoice Items**
- **Customer Shipments > Shipped Items**
- **Goods Receiving Vouchers > Received Items**
- **Vendor Invoices > Invoice Items**
- **Returns to Vendor > Returned Items**



- **Reporting Production > Production Details**
- **Reporting Production Details**

We renamed the **Plastic Packaging List** program to **Packing Material Declaration** and added the **Transaction Type** column to the detailed report to show the document type.

- **Intrastat** - We added automation to prefill the region of origin on Intrastat transactions, according to the following hierarchy:
 - **State** field in **Intrastat Definitions** (under document lines)
 - **State** field in **Intrastat Definitions** (under the document)
 - **State** field of the document's warehouse
 - **State** field of the document's branch
 - **State** field of the company
- **Companies with VAT numbers in multiple EU countries** - We added a new **Branch** input parameter to various Intrastat and EC Sales reports, allowing businesses with VAT numbers in multiple European countries to submit these reports separately by VAT number.
- **EU VAT Reports menu** - To make navigation more intuitive, we organized the **VAT Reports** menu for the EU into five submenus: VAT, Tax Payments, Intrastat, EC Sales, and Audit. The relevant entities are associated to their corresponding submenu. **New Behavior**

United Kingdom

- **Digital banking** - In continuation of Version 23.0, in which we added the ability to send Bacs payments, we now added the option to transmit transactions as one batch. This change does not affect the ability to initiate multiple payments at once (which was available before) but rather lowers the fees that a business might be charged by their bank for such an operation. For more information, see the [SOP](#).

Italy

- **Registro IVA by sections** - We added the option to define VAT sections in the system, assign invoices a protocol number according to their VAT section, and display the VAT report segmented by these sections. For more information, see the [IVA-VAT Management - Italy SOP](#).
- **Modello 770** - We added the option to create a withholding tax submission in **Priority**, as per the requirements of the Italian tax authority. You can export the information to a file formatted according to Modello 770, ready for submission. For more information, see the [Modello 770 SOP](#).



Belgium

- **Recycling Tax** - To support Recycling Tax in Belgium, you can define that parts representing Recycling Tax (e.g., on appliances and electronic goods) will not be subject to discounts. Classify part families as **Recycling Tax** and link the parts to the family.

Israel

Financials

- **New regulations for submitting invoices and donations** - New regulations in Israel from January 2024 make it mandatory for businesses to submit their invoices for pre-clearance with the tax authorities, as well as donations for businesses who receive donations. Therefore, **Priority** has developed robust infrastructure that includes authentication with tax authorities, as well as the submission of donations and receipts.
- **Record bank statements from Discount Bank (Mercantile)** – As per instructions of Discount bank, we now support the new **Hashavshevet** format for importing bank statements from **Discount Bank (Mercantile)**; the old format is no longer supported. **New Behavior**
- **System 1000** - We added specific support for uploading files from the 1000 system to support vendors defined as **Partnerships** in the **Financial Parameters for Vendors** form. When you run the **Prepare File for System 1000** program, the way to identify with the tax authorities is now through the **VAT Number-Vendor** field.

Digital Banking

Bank Leumi

- **Hebrew remarks to bankers** - We added the option of sending banker remarks in Hebrew, following Bank Leumi's new support for Hebrew characters.
- **Support for future payments** – Now that Bank Leumi has added support for the transmission of payments with future dates, you can also do this in **Priority**. Note that the bank supports one batch at a time with a future date, so the system will prompt the user to select a future date, and all payments due on that date will be transmitted as a batch.

Payroll

- **Codes for unpaid leave** - We now support a connection between the unpaid leave code reported for an employee, and the unpaid leave code updated for an employee, when transmitting through the Employer Interface for pension (Open Format).
- **Fixed notes on payslips** - We added the option to put fixed notes on payslips, per employee or employee group.



- **Surtax** - We added a calculation for surtax on stock options.
- **New payroll component** - We added a new payroll component to adjust global overtime payment.
- **Journal entries for unpaid leave** – Now the system will automatically record journal entries for payments to National Insurance for employees on unpaid leave.
- **Regulation Updates** -
 - We updated Form 101 according to 2023 regulation requirements.
 - We added support for the new Form 161 format as required by the Israeli tax authorities.

Perpetual Inventory

- **Open finalized inventory transaction documents for editing** - Now working with online perpetual inventory is more flexible. You can open finalized inventory transaction documents for editing even if a journal entry is already recorded for the document. The recorded journal entry will be canceled accordingly.
- **Choose the cost of a returned item** - Now you can choose if the inventory transaction cost of an item returned from a customer, or returned to a vendor, will be the same as its original cost when it was shipped, or if it will equal the FIFO/Moving Average cost of the item at the date of return.
- **Control on negative inventory** - We added a control for managing inventory balances when working with online perpetual inventory. By setting Online perpetual inventory, the system will automatically block the option for recording inventory transactions that would result in a negative inventory balance in the warehouse. This is especially useful for improving the consistency of inventory account balances to the inventory valuation.
- **Terminology update** – To better suit its functionality, we updated the name of the **Perpetual Inventory Posting** menu to **Inventory Transactions Posting**.

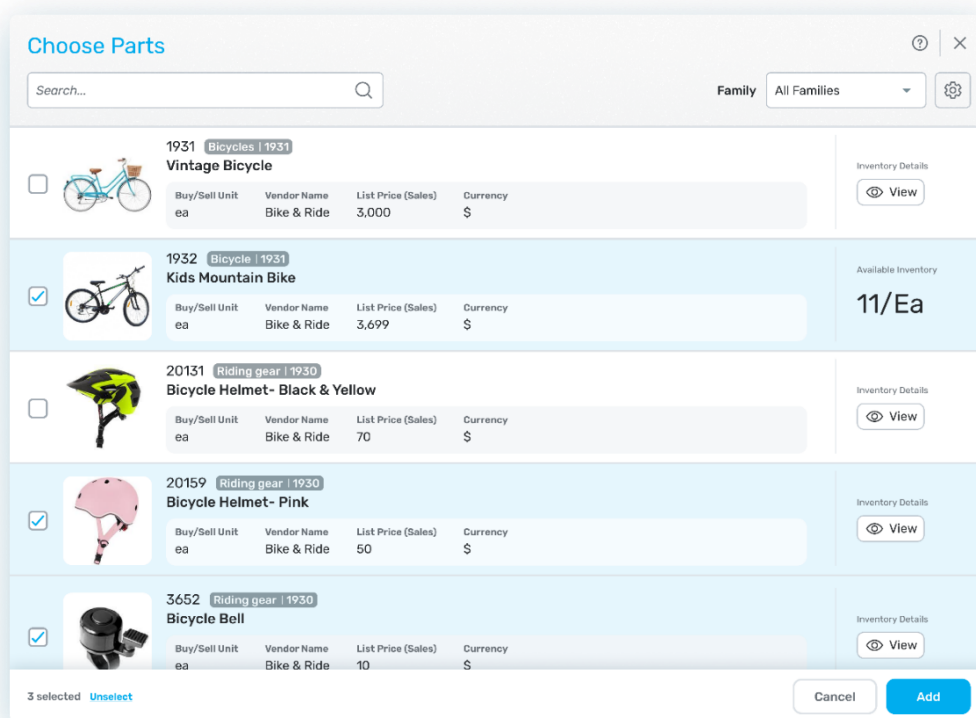
Supply Chain Management


General

- **Advanced way to choose parts** - Now, when adding parts to documents, you can search, filter, view more part details, and even choose multiple parts at the same time.




For example, to add a bicycle, helmet, and bell to a sales order, you can search for the parts, filter according to the **Riding Gear** part family, and view more relevant details like pictures and available inventory, all in one click. Easily choose the three parts you want, and the sales order will fill in accordingly.



Click the new icon  from the search list in the **Part No.** field. You can personalize the details you want to see, according to your needs, using the design settings.

*We expect to release this development after version release to customers. We will update accordingly.

Purchasing

- **Email approvals for purchase demands and purchase orders** – We added new fields to the interactive email sent for approval, like the project, the document price (before tax, tax, total price), and the budget item. In addition, now the approval list and approval status for the document will appear, and document attachments will be added to the email. 

Sales

- **Product bundles** – Now you can work with product bundles directly from within the document line items, for example, in a sales document or invoice.



This way you can work with product bundles and single items together in the same subform. For more information, see the **Product Bundles SOP**.

Rentals

- **Non-billable rental dates** – Now you can prevent billing for specific dates for rentals charged by monthly rates, using the Non-billable Dates subform. For more information, see the [SOP](#).

Inventory and Warehouse Management

- **BarTender API** - We added a new BarTender integration, so from now on all label printing will be done by API calls instead of files. For more information, see the [SOP](#).

WMS

General

- **Automatic subsequent tasks** – Now, in just a click of a button, you can create a subsequent task for a warehouse employee for a task that did not end. This process allows you an exact inventory update for the part of the task that was completed, and you do not have to run another wave for the task balance.
- **Multiple loading decks** – We added support for multiple loading decks, like we already have for multiple unloading decks. This allows for automatic inventory routing at the end of the warehouse pick to the relevant distribution line.
- **Custom Warehouse Task Waves** – As you know, you can use the **Create Custom Warehs Task Wave** program to do any custom task in the warehouse that does not need an inventory document. Now we added the **Task Split Method** option, so you can choose how to split the tasks that will be created by this program, according to your preferred splitting method, for example, reapplying labels in a specific deck only, or weighing pallets in a specific area only.
- **Printing from mobile devices in the cloud** - From now on, when printing documents from your mobile device, the system will identify if you are a cloud user, and if so, the document will be sent to the printer via email. Just define an email address for your printer in the **Define Email Address for Printer** form. This solution requires a printer for which you can define an email address.

WMS Application Generator

The WMS Application Generator, for building personalized applications for work in warehouses, now has new capabilities:

- **Picking parts for multiple orders** – Organizations that would like to pick the same parts for multiple orders simultaneously, can use “Parallel Pick” mode in



the mobile device. This process includes the option for picking a total quantity, and instructions from the system as to how to distribute the quantity between customers.

- **Task itemization summary** - Now, warehouse tasks also show a summary of the task itemization by inventory. This way, similar recommendations for different order lines will appear and be reported together. This is especially useful for organizations in which warehouse pick tasks are for more than one sales order, so tasks can be performed quicker.
- **Know which data to fill in first** - You can define that data that must be filled in first will pop up in the user's mobile device as soon as they start working on a task, like what we already offer for finalizing a task (e.g., updating the weight of an empty pallet).
- **More data for choosing parts to print** - When printing a part, you can now choose additional data in the parameter input, like work order, in addition to part number.
- **GS1** - We enhanced the existing GS1 support to reports and printouts using the new definition in the **Folder Menu Content** form.
- **Quick scan for mixed pallets** - Now you can scan mixed pallets (pallets that include different kinds of parts), in one easy scan, quickly, without needing to detail the different part numbers or batches in the pallet.
- **SSO** - The application now supports the **Priority** SSO.

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

Planning

MRP for Distributors and Manufacturers:

- **BOM revisions** - Now you can choose a BOM revision for an order item of an assembled or manufactured part. The Create BOM for Order Item program will consider the BOM according to the revision that you chose. The BOM for the item will be considered in the MRP. MRP for manufacturers will consider the BOM revision chosen for the item, in work orders and issues plan.

Customer Request

- **Blanket Orders** – Now you can open demand forecasts for blanket orders. The MRP program will take the forecast balance into account after deducting sales orders opened for a blanket order. **Customer Request**
- **New options for Replenishment Types** – We added more options for the Replenishment type, including the option to combine fluctuated consumption and fixed consumption, and the option to ignore the part in the MRP and



purchase planning programs. The options appear in the **Replenishment Type** field, found in the **Purchase/MRP Parameters for Part** form.

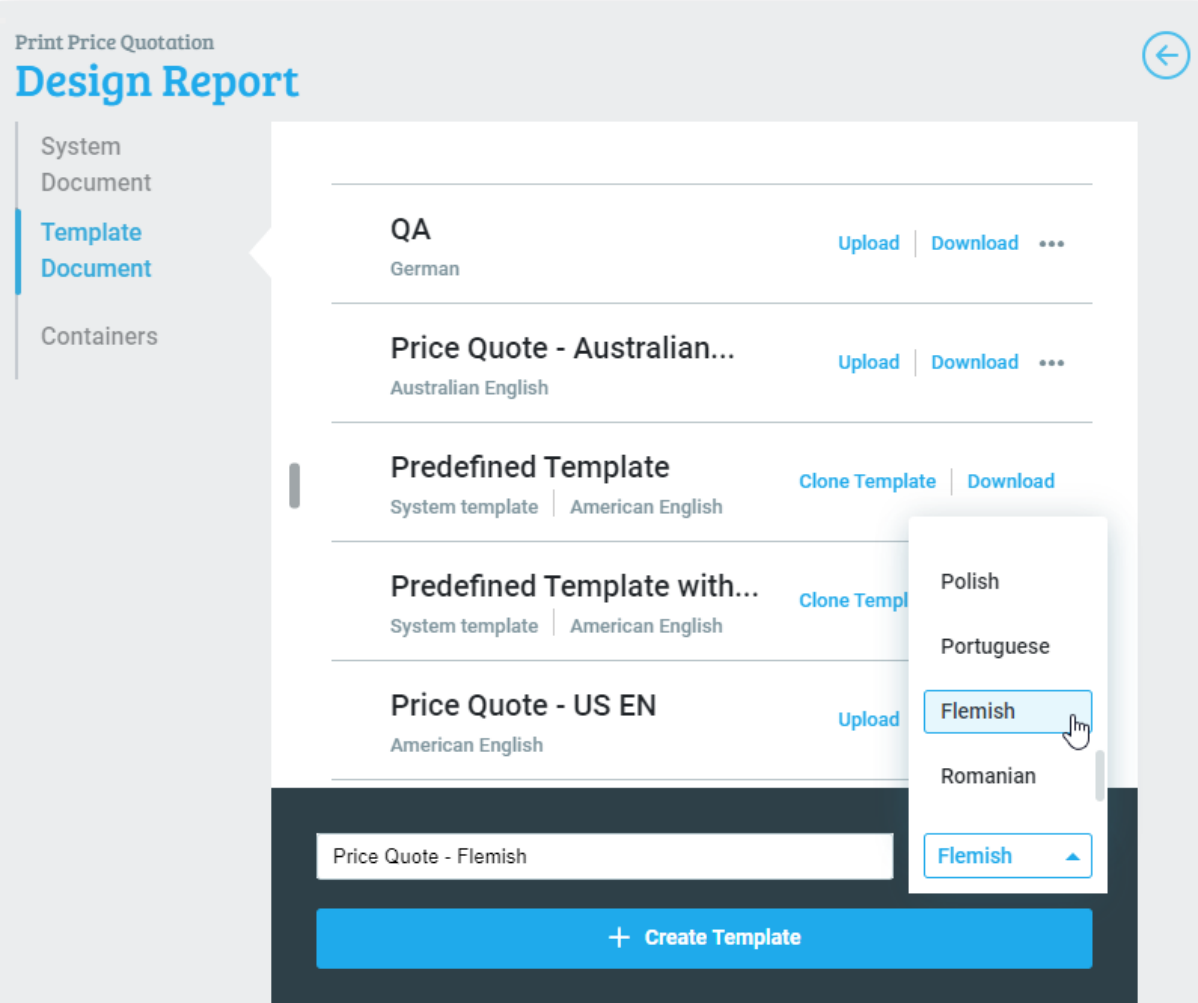
System Maintenance

- **Word Templates** - We added the option for the system to automatically delete a whole row in a table that has no data, like what already exists for table columns. This is especially useful for fields that do not always have data, for example, a shipping address. You may only use 2 address lines, and not the third, which can now automatically be deleted by the system.

Customer Request

- **Word template languages** - You can now define a language for every new Word template you create. All the templates will be available in every language you work in, without having to create the same template for each language separately. This will not affect the content of the template. For more information, see the SOP. For more information, see the [SOP](#).

Customer Request



The screenshot shows the 'Design Report' interface for 'Print Price Quotation'. The left sidebar contains navigation options: 'System Document', 'Template Document' (highlighted), and 'Containers'. The main content area displays a list of templates:

Template Name	Language	Actions
QA	German	Upload Download ...
Price Quote - Australian...	Australian English	Upload Download ...
Predefined Template	System template American English	Clone Template Download
Predefined Template with...	System template American English	Clone Template
Price Quote - US EN	American English	Upload

A dropdown menu is open over the 'Price Quote - US EN' template, showing language options: Polish, Portuguese, **Flemish** (selected), and Romanian. Below the dropdown, a text input field contains 'Price Quote - Flemish' and a button labeled 'Flemish' with a dropdown arrow. At the bottom of the interface is a blue button labeled '+ Create Template'.



- **Export reports to Excel** – Now, when you export reports to Excel spreadsheets, the reports will be exported according to the report format instead of the DB format. **Customer Request**
- **Recommended programs in TTS** - When you open a company, recommended programs to run in the TTS will update automatically as part of the **Update Basic Data** program, according to localization. This is applicable for countries in which Priority Software maintains basic initialization data.
- **Support for company vertical** – We added infrastructure to support verticals and provide out-of-the-box data by vertical, like we provide for localizations for new companies. In the future, when we introduce verticals, you will be able to select the company vertical when opening a new company from the predefined vertical list. Once you've selected a vertical, your database will include data specific to your company vertical.
- **Business rules in appointment calendar** - We added the option to define that the Appointment Calendar, Technician Scheduling Calendar, and Gantt Chart will support business rules using the **CALENDARGANTBPM** system constant. **Customer Request**

Developer Tools

- **System/mail folder** – We updated the **SDK** with a new way to create files in your system/mail folder using a new local folder. This is mandatory when developing in the cloud, but we recommend it for all developers. **New Behavior**
- **SFTP** - We added support for uploading files from Priority to an external SFTP folder. For more information, see the **SOP**. **Customer Request**
- **Developing VS Code plugin** – You can use a VS Code developing tool when developing in **Priority**. Just add users to the **VSCoDe Connector** in the **Applications for License** form. For more information, see the **How to Set up VS Code SOP**.
- **Copy form interface** – We added an action for copying an existing form interface. This is particularly useful when a standard form interface needs to be copied for mapping out private fields.

