

Priority Release Notes v22.1

Highlights of version 22.1:

- A quick look at customer, vendor, part, and project details
- Workspace personalization, with insights from your top searches
- Available to Promise - ATP
- New possibilities for managing approval lists
- More options in innovative reconciliation work areas

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The details you need, where you need them

Experience the most effective workflow without having to spend time searching for data.

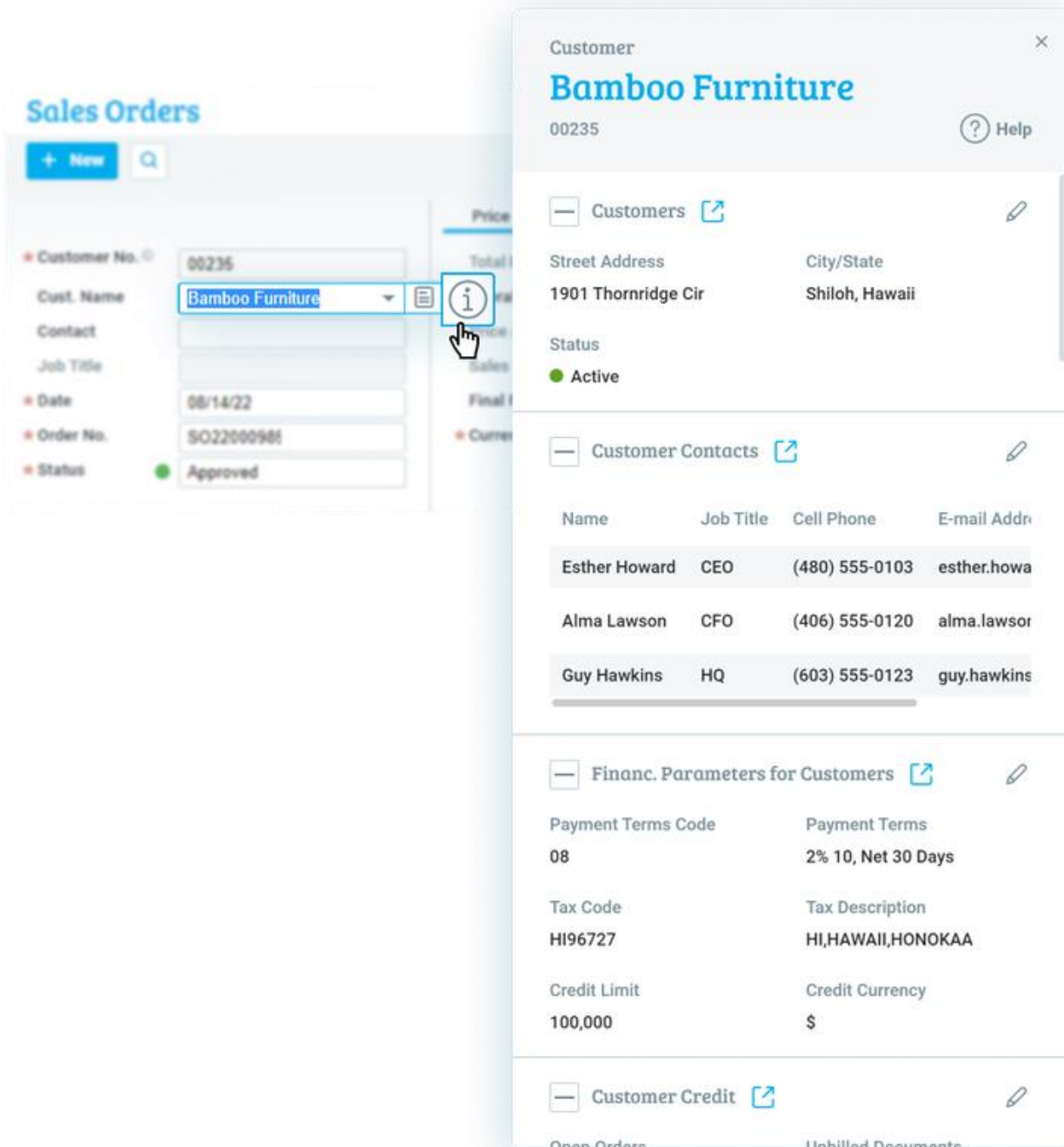
We searched and found the data you need, and put it in the places you need it.

Introducing the new **i** icon - just one click to open a side panel with relevant details from other forms.

For example, when you add new items to a document, you can view details like part prices, availability, and preferred vendor, without having to go to other forms.

For your customers, you can easily view the address and phone number, payment means, credit details, and more. Find the **i** icon in the Customer, Part Number, Vendor, and Project fields in every form.

Personalize the panel using the design tool to choose the information that you prefer to see.



Your workspace, set up just for you

- Top searches -

Priority's search tool just got stronger, more personalized, and insight-based

Using new technology, enjoy a personalized workspace based on smart insights. Get useful recommendations to save your top searches, and see the data you want with

just the click of a button or, immediately upon opening the form - saving you time, and freeing you up for more important tasks.

Recommendations for you

We notice that this is one of your top searches. We can add it to your saved searches so you can access it again with just one click.

Name your search:

Date **between** start of this year - today

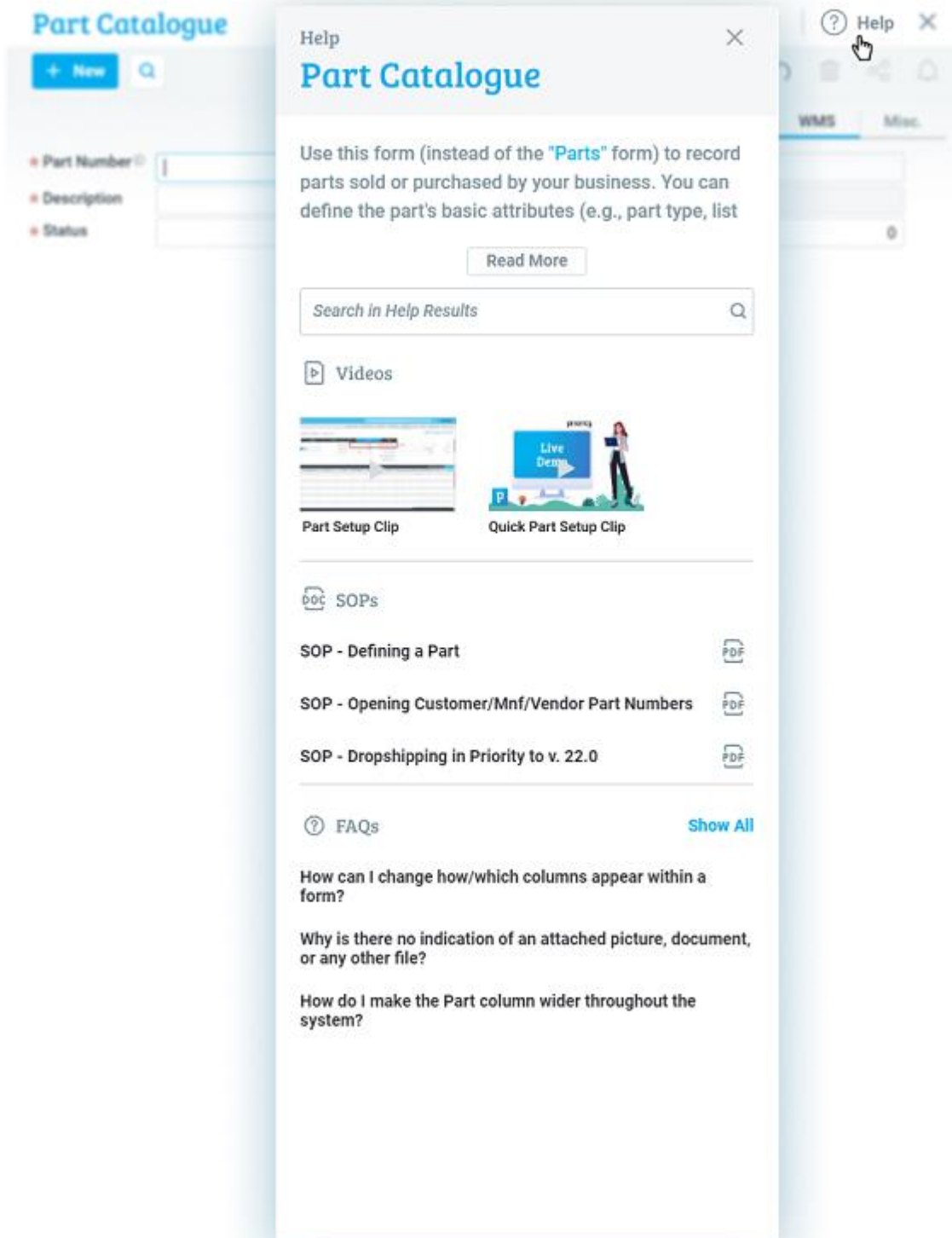
Order Status **equals** New

Maybe later | Don't show me again | **Save my search**

- **Your branches, your workspace** - As a user working for an organization with multiple branches, you can now define which branch you are working in, in real-time, for a more personalized workspace. The option to define a branch will affect how branches in different documents in the system are filled in, and the relevant input that will be saved for programs and reports you run.
- **System Help Tools** -

Get to Know: Buttons, Icons, and Keys - You can now find a new help resource under the Help icon in the Help menu (?). This resource is especially useful for new Priority users, but those more familiar with Priority will also benefit from this extensive reference to all the buttons and icons in the system. This document includes the shortcut keys reference, replacing the former Keys and Functions document.

In addition, you can easily and effectively find any help you may need in the system, with the updated **Helpbook**, found in every document, including the most relevant videos, SOPs, and FAQs. As we continue to update our help, we refreshed our video tutorials, taking down older videos, and are planning to gradually remove the Wizard help, focusing on the most updated and relevant help for you.

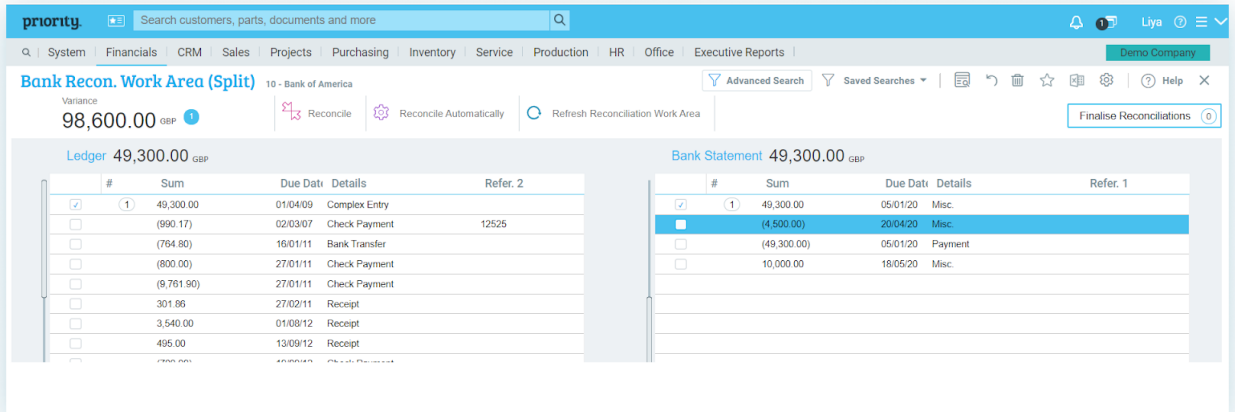


- **Sharing documents from Priority Mobile** - The last print format you choose is automatically saved as your default for easier sharing.

Financials

Reconciliations

- **Innovative Reconciliation Work Areas** - Split reconciliation work areas provide the most effective reconciliation experience. We invite our customers to use this reconciliation experience on bank, account, and credit card reconciliations.



In our ongoing efforts to improve the reconciliation experience, we added new features to the reconciliation work area:

- **Show More Fields** – Now you can show more fields in each side of the reconciliation work area, using Form Design. Move easily between fields using the keyboard arrows.
- **Automation for Discrepancy Calculation** – We added an automation for calculating a discrepancy remainder, for when the user wants to record a reconciliation transaction with a discrepancy amount, and split it between several accounts.
- **Temporary Reconciliations** – To make editing temporary reconciliations easier, when you edit a reconciliation on one side of the work area, the lines with the same reconciliation number on the other side will pop up to the head of the work area.

For more information about this reconciliation method, see the [SOP](#) and [video tutorial](#).

- **Exchange rates in Foreign Currency Reconciliations** - In foreign currency reconciliations, the system will no longer force setting an exchange rate manually, but will identify the exchange rate automatically, according to the exchange rate of the original transaction date, or the manual transaction date that was set for the reconciliation transaction.
- **Renaming of Forms** - To describe its functionality more accurately, we changed the name of the Reconciliation Methods and Codes menu to **Reconciliation Methods&Criteria**. Along with this change came three more changes:
 - The Reconciliation Codes form is now **Reconciliation Methods**.

- The Reconciliation Methods form is now **Reconciliation Criteria**.
- The Cancel Pending Reconcil'ns program is now the **Cancel Pending Recon.** program.

Budgets

- **Multi-Year Special Budgets** - When working with multi-year special budgets, we tightened the link between the appropriation dates and the report dates so that you can now view the most accurate budget appropriations and budget usage when generating budget reports, according to the report dates.

Priority Payments

- **Additional Payment Means** - We added the option for you to register to use additional payments methods directly from within Priority, (**Bit** in Israel, **BACS** in England, **SEPA** in Europe, etc.).
- **Data level 2/3 for credit card transactions** - We now transmit data-level 2/3, to increase the success rate for credit card transactions. For more details, see the attachment in the [SOP](#).

General

- **Define a tax group when recording expenses**- In the Expense Invoice Report form we added the option to define a tax group. When generating an invoice, the default part number of the tax group is recorded, instead of the general part number, allowing for multiple tax rates in invoices originating from the expense form.
- When preparing receipts for standing orders, in the invoices form, only those invoices that have a value in the **Account/Credit Card to Charge** form will be shown.
- **Document numeration templates** - We now support preparing document number templates for future years.

Country-Specific Features

Global

- **International Shipping-**

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

- Supporting customs for shipping between different countries
- Using shipping crates that are not necessarily linked to a carrier
- Aligning the shipping address to the sending warehouse
- Defining shipments to business or residential addresses

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

- **Customer side tax code** - We added an automation for setting a tax code for a customer site according to site country, similar to what we already offer in setting up a customer tax code by country.

Europe

- **Intrastat and EC Sales List Default Codes** - We added new infrastructure for managing Intrastat and EC Sales codes in a more flexible way, that users themselves can configure. We added the option to define a default Intrastat and EC Sales code for the company, customer, or vendor. For example, a company that provides a service can define the relevant Intrastat and EC Sales codes as the default codes, so they will not have to change codes for every purchase and sales transaction.
- **VAT report by boxes** - We added support for creating a tax report by boxes for a company group.
- **Plastic Packaging Tax** - We expanded support for the Plastic Packaging Tax, to fulfill the regulation requirements for additional EU countries. For more details, see the [SOP](#).
- **E-invoice format** - When you choose an invoice print format to accompany the electronic invoices, now you can choose a Word template format as well.

Belgium

- The EC Sales List report for Belgium now includes a detailed format.
- We added validation for typing the value in the OGM field in vendor invoices.

Portugal

- We added support for digital signatures in customer return documents and SAFT reporting, including signature details, allowing for a shipping document reversal using the return document that complies with regulation requirements.

Italy

- **Frequent Exporter** -
 - **Mobile Plafond** – We now support the frequent exporter rolling plafond calculation on a monthly basis, (the calculation of yearly plafond at the beginning of each month).
 - Our customers working with frequent exporters can now define expiration dates on tax-exempt protocols. The expiration date can be transmitted with the e-invoice as required by the tax regulations.
- **F24 Form** - We added support for creating an F24 form in a file format, ready for sending to the tax authorities.
- **Electronic Invoice Remarks** - We now support uploading and downloading free text remarks in electronic invoices.

Poland

- **Split Payments** - We added infrastructural support for the split payment mechanism required in Poland. See the [SOP](#) for more details.

Israel

Digital Banking

- **Changes to additional payment definitions** - You can now make changes in payment definitions even after the payment is final, using the **Revision of Payment Details** form. This is especially useful if you need to fix incorrect details in a foreign currency transfer and retransmit it to the bank.

Bank Leumi:

- **Remarks to your Bank Leumi banker** – You can now send notes to your banker as part of the transmission. For example, if you want to make a transfer in US dollars, but you want the transfer to be paid from your Euro account, and not from your US dollar account, you can write this to your banker.
- **Manage vendor details** – When working with vendors that receive payments in foreign currency, now you are not required to manage all the vendor details in the system, if you manage the vendor's unique ID number as defined by the bank.
- **Remarks to SWIFT** - Now, when sending payment in foreign currency, we will send the payment remarks as a note to SWIFT. In addition, we removed the set of invoices covered by the payment.

FIBI Group:

- **Bank Account Type** - Now you can define the bank account type (Deposit, Savings, etc.), to confirm that when you extract bank statements, every transaction goes into its relevant sub-account.

Payroll

- **Fund benefits for Form 161** - We added support for creating a fund benefits attachment to Form 161 in the system. You can also generate the form in a predefined Word template.
- **Create new payroll components** – Now you can copy existing payroll components and use them to create new ones with similar definitions and names, as needed. We also deployed additional payroll components for one-time payments.
- **Reserve Duty Form Transmission** - We now support the digital transmission of the Army Reserve Duty form to National Insurance.
- In accordance to regulation changes, we added the following support:
 - View insured salary for pension funds in Form 106 for maternity leave
 - Employer Interface Version 4
 - Updated tax credits for new immigrants

- Support for Form 100 for National Insurance
- Monthly detailed transmission to National Insurance based on Item 355 (Detailed Form 102)
- Bonus tax credits for children ages 6-12 for 2022

General

Withholding Tax – For working with international vendors or companies, or the Palestinian Authority, we added controls for more accurate definitions in the Financial Parameters for Vendors form, in addition to the values sent in interface 856, according to the tax authority requirements.

Approval Lists

We continue to develop Priority’s Approval List solution to give you the best experience. Now, approval lists are managed in new, unified form, offering you the following features:

- **Automatic selection of approval list code** – The system can now automatically choose the most fitting approval list according to the data in the document. We made this possible by giving you the option to define parameters for approval lists; e.g., branch, department, and budget item. For example, if the branch defined in the document is “Johannesburg” and the demand type is “office equipment,” an approval list that fits the criteria will be filled in automatically according to that specific data. The approval list conditions are defined in the new **Approval Lists** form.
- **Approval lists by position** – Organizations that appoint positions according to project or branch can now define approval lists by user position, and not only by a specific user. For example, for an approval list that first goes to a project manager and then goes to a branch manager, you can now just record the position once, so that the approval will be requested from the specific managers according to project and branch.
- **Start a document approval round** - Now, an approval round will only start when the document is moved to a status marked as **Pending Approval**. Therefore, the **NewAppList** logistic constant is canceled.
- **Approval round for purchase invoice** – For interested organizations, you can now define that invoices can start an approval round after the invoice is closed, and before the payments are prepared.
- **Approve or decline directly from your email** - When a purchase order or purchase demand is ready for your approval, you will now receive an interactive email, allowing you to approve or decline from the email itself. Your response is automatically recorded in the system. Just set the **EmailApprove** logistic constant.

Dear Eva,
You have received a document for approval.

Vendor name	CUTTINGEDGE LLC
Vendor number	10005
Previous approver	Kate Smith on 10/02/2022 13:39
Document details	PD Oct. 2022
Document status	Waiting
Demand type	Internal Purchase Requisition
Branch	Long Island
Demand number	PD22000131
Demand date	10/01/2022

Part no.	Part description	Unit price	Quantity	Unit	Budget item	Total price
L850	Blue light	USD 79.50	15.00	ea	1.2.3.4-001	USD 1,192.50
001A1	Red Pen	USD 0.99	50.00	ea	15.9-20	USD 49.50

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To better describe the functionality of Authorization Lists, we updated the name to **Approval Lists**. Continue to use approval lists the way you know, with the new and updated terminology.

Find more information for Priority's approval lists solution in the [SOP](#).

Supply Chain Management

ATP Available to Promise

Quickly check supply available to promise directly from the sales order line -

Use the new ATP feature and immediately know if it is possible to supply the ordered item, in the ordered quantity, and on the requested date.

This is especially useful for your sales process, in that you can quickly check the supply availability upon receiving a sales order, by using the new **ATP Stock Availability Check** program from the item order line.

If the supply is unavailable, you will know the earliest date in which it will become available.

These results are based on the previous MRP run, while also taking into account the previous ATP checks and order commitments.

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

Sales Reps and Commissions

Sales rep commissions

These new constants will help you manage new settings for sales rep commissions:

- With the **SSaleComType** logistic constant, you can define if in the sales rep commission documents that the system generates, the commission is calculated according to the sale price before the discount, after the discount, or according to the profit of the sale.
- With the **SSaleComProf** logistic constant, you can decide whether to include the sales rep commission in the document's profit margin calculation.

Sales process with two sales reps

Organizations working with two sales reps in a single sales process can seamlessly manage these processes in the system. This includes commission management for two sales reps, and system sales rep reports.

- With the **STwoAgents** logistic constant, you can choose how to calculate commission in the case that there are two sales reps.
- Using the **OneInvPerSalesRep** financial constant, you can define if and how the system will split invoices by main sales rep and the additional sales rep. See the [SOP](#) for more details.

Sales

- **Product Bundles** – We added product bundles for shipping documents and invoices. In addition, we shortened the name of the **Product Bundles (Quotes/Orders)** menu and form to **Product Bundles**.
- **Set text according to branches** – Now you can record remarks in sales documents according to branch. Set the text in subforms of the **Branches** form.
- **Text for Sales Orders** – Now you can add set text to be included in all sales orders, using the new **Text for Sales Orders** subform, in the **Customers** form, (similar to the **Shipment Remarks for Customer** subform).
- **Change Customer Status** - Now you can change the customer status from the **Financ. Parameters for Customers** form.

Rentals

- **Advance Billing** - Now you can charge advance payment on rentals, before the rental period begins.
- **Rental Linkage** - You can now define linkage for a rental contract similarly to linkage for a service contract.
- **Track Rental Start and End Reports** – To seamlessly track the parts that need to go out for rental, or return from a rental on a specific day, use these two new reports. These reports are an addition to the regular forms you already know and use.

- **Rental Items Report** – Now you can run the report for serialized parts.
- **Print Format** – Now you can choose from an additional print format, **Include rental payments**, to include payment itemization.

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

Purchasing

- **Vendor Bonuses** - Now you can record the bonus parts you receive from your vendors in the system. The bonus parts will automatically appear in purchase documents, similar to bonuses in the sales process. See the [SOP](#) for more details.
- **Open an RFQ with a Purchase Demand** – Now you can open an RFQ from a purchase demand, and you can create RFQs for several different vendors (for all the parts in the document).
- **Change Customer Status** - Now you can change the vendor status from the **Financial Parameters for Vendors** form.

Inventory

- **Label printing** – Now you can enter up to 80 characters for parameters 1, 2, and 3, in the **Label Preparation Work Area**.

Warehouse Management System (WMS)

- **Over-the-counter invoices close automatically for a “pick” that ends** – Now you can choose for the system to automatically close the over-the-counter invoice created when a pick ends.
- **Prevent Inventory Transfer documents after receiving goods** – For interested organizations, you can now define in the **Warehouse Tasks** form not to prepare transfer documents after the warehouse receives goods.

Service

When working with the Meter Module, now the **Covers from** field will be filled in when preparing a payment based on the meter reading.

MRP

- **MRP for distributors by branches** – Now you can run MRP planning for distributors, by branch.
- **Analysis of MRP Results and Purchasing Shortages Reports** - These two reports now show data by branch.

To read more about our MRP solution, see the [SOP](#).

Costing

- **Adjust inventory transaction cost by BOM** - Now you can define that at the end of running the costing, inventory transactions costs will be updated according to the updated BOM costs. You can choose in which inventory transactions the costing will

be updated. In this way, the profitability calculation will be updated to the most updated BOM cost.

System Maintenance

- **MDM data distribution between companies** - When transferring data between companies or installations, the data will transfer even if the form structure of the source company does not match that of the target company.

The source company can also transfer data to customized fields in target companies. (No more need for field name checks in the target form).

This is especially useful for companies that do business together, because now you can transmit purchase orders from Priority that will be converted into sales orders for the vendor. In addition, companies that have different installations can also benefit from data distribution between installations when the form structure is not the same.

To use this, the two sides must have the MDM module.

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

- **User Verification in Business Rules** - We added a **User verification** option to Business Rules. Now you can define that when certain conditions are met, a message will be received, requiring the user to re-enter their password. This way, you can be sure that the user making the update is actually a user with permissions to do so. This is especially useful in the pharmaceutical industry, or other domains heavily regulated around information security. For example, when changing the status of a part, you can now confirm that the person logged in is actually the person making the status change.
- **We added a History of Changes subform to the following forms:**
 - System Constants forms (logistics, production, and more, like we already have in the Financial Constants form).
 - Sales Rep Commission
- **Data permissions** - Report and program input are now subject to data permissions. A user will only be able to generate a report or run a program for records from input for which the user has data permissions.
- **Setup Email - Gmail/Office 365** - On October 3, 2022, Google stopped supporting the current connection method to all third-party programs, to protect users from phishing and app impersonation attacks.

Starting from version 22.1, we created a solution that changes the way in which you connect to your Google account, and at the same time we added support for Microsoft 365, (without having to connect with SMTP).

Therefore, we changed the name of the program from **Mail Options for Gmail** to **Setup Email - Gmail/Office 365**, to better fit its functionality.

Developer Tools

- **ODBC** - We added a new way to connect to the business data of the system from outside. This is an additional connector to the system allowing access to data found in the application layer, according to the structure presented in the form.
 - The ODBC allows for reading data in SQL commands, from every client that works with ODBC.
 - Allows for quick retrieval of Big Data, lightening the work for the third-party systems, e.g., BI systems.
 - The ODBC data is subject to user system permissions.
 - You can define exactly which forms and subforms to make available through the ODBC.
 - For instructions and more information, see the Priority [Developer Portal](#).
- **REST API** - The API is now subject to detailed user permissions according to system form fields. Users will receive an error when trying to read or write data in fields for which they do not have permissions.