Priority Release Notes v24.1

Version 24.1 includes many new releases, among them:

- Priority Analytics – Data Visualization
- Portal Generator
- BPM
- Form Design
- Year-End Wizard
- Multi-Company Approval Form

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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Version 24.1 – Performance and Stability

In this version, we focused on enhancing overall performance and stability.

Particularly, we made significant improvements within the MRP and Warehouse Management (WMS) programs.

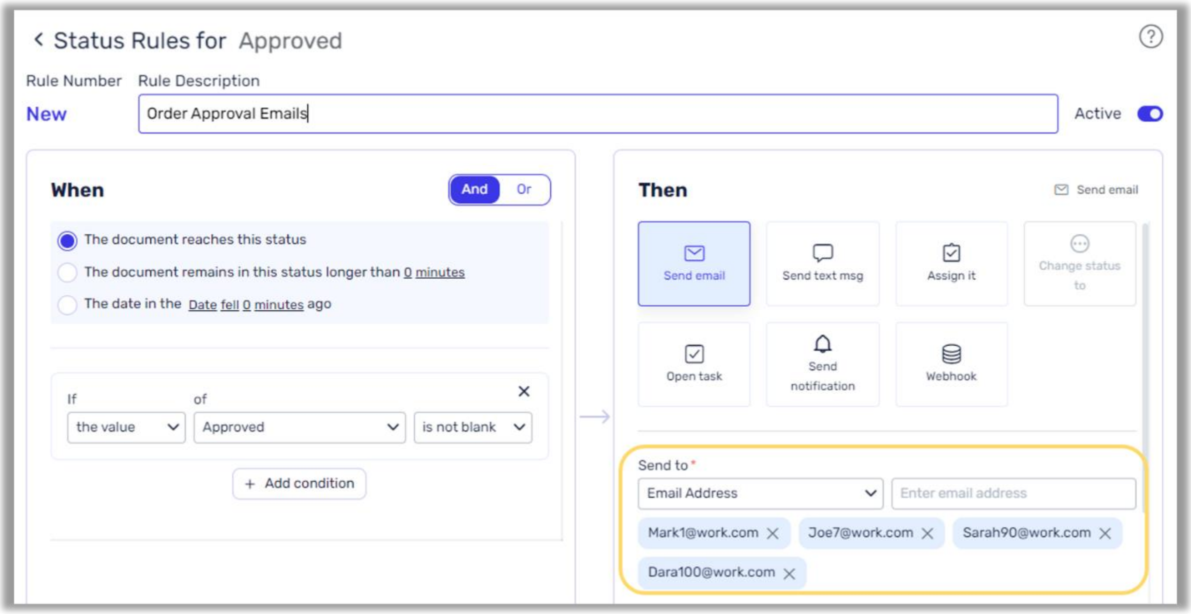
We implemented self-protection features and made improvements when printing and copying text from the system, saving permissions, managing business rules, updating system constant values, and WINDBI runs.

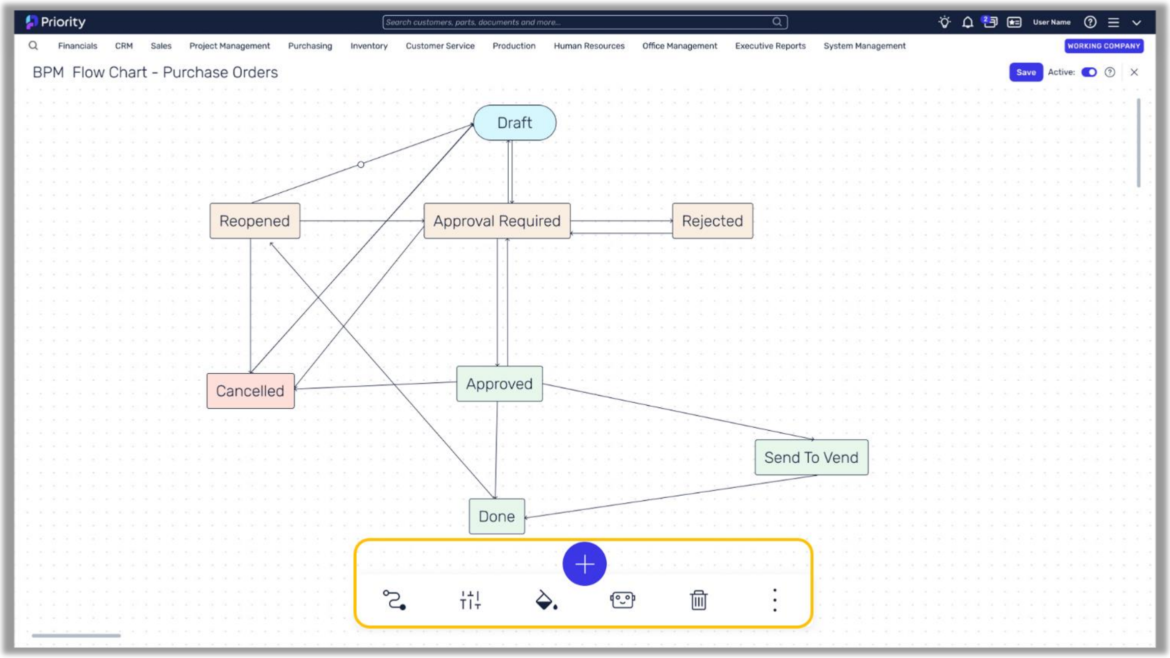
Key updates include optimizing system efficiency to ensure a fluid operation and a reliable user experience.

These enhancements aim to boost speed, reduce downtime, and provide a consistent and seamless interaction with ***Priority***.

User Experience

- **New, intuitive experience for BPM (Business Process Management)**
  - **Send emails to multiple recipients –** You can now send emails to many recipients at once with the new BPM experience. No need to duplicate rules, as automating emails is a quick process – all in just one click. For example, when a document reaches a certain status, such as **Approved**, you can define a rule that an email will be sent to a list of multiple recipients. Customer Request
  - **New filter and search tools –** Quickly find the BPM rule you need. Filter by specific criteria, or search by keyword. Want to find all rules that automate emails? Use the filters. Need to search rules by field name? Use the search box.
  - In addition to the new capabilities, you will find your BPM experience has a significant upgrade in design, where you can easily and intuitively create and manage your BPM workflows.





All your existing BPM rules are right where you left them, where you can still find all the functionalities you know.

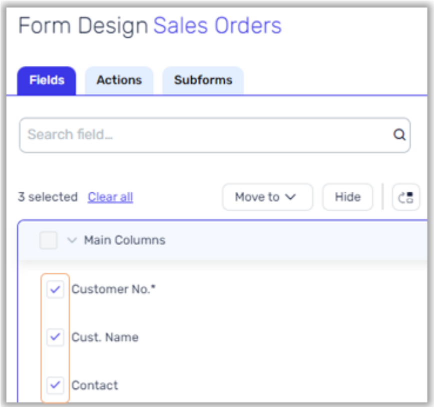
For more information, see the **Working with BPM Flow Charts** SOP.

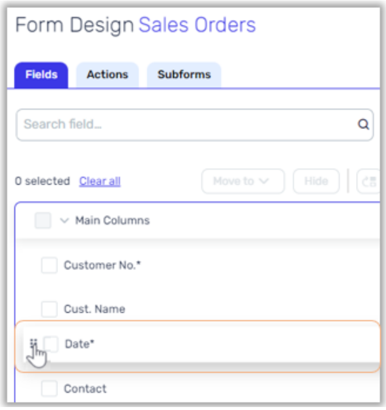
- **Form Design – Quickly and easily personalize your workspace**

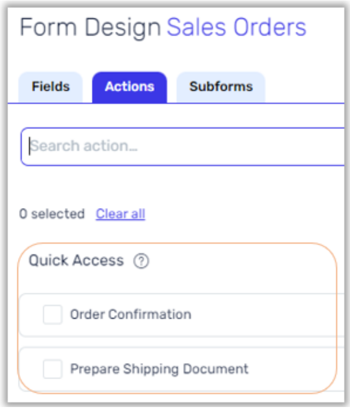
  Using the existing Form Design tool, you can personalize the appearance of forms. Choose to easily hide unused fields and change the position of fields, tabs, subforms, and actions, according to your needs. **Customer Request**

  Form Design now has several innovations:

- **Multi-Select and Drag & Drop** – In a single click you can now choose a group of fields and move them to another tab or choose to hide the fields in a form. Similarly, you can design a group of subforms or actions. You can also easily change the position by dragging the field, subform, or action.
- The new **Quick Access** area clearly shows you the two actions that will appear on your form header. The rest of the actions will appear in the list. Edit them according to your needs.
- Form Design has never looked better, now in line with the ***Priority*** rebranding.







Priority Analytics

Visualize your data in Priority Analytics

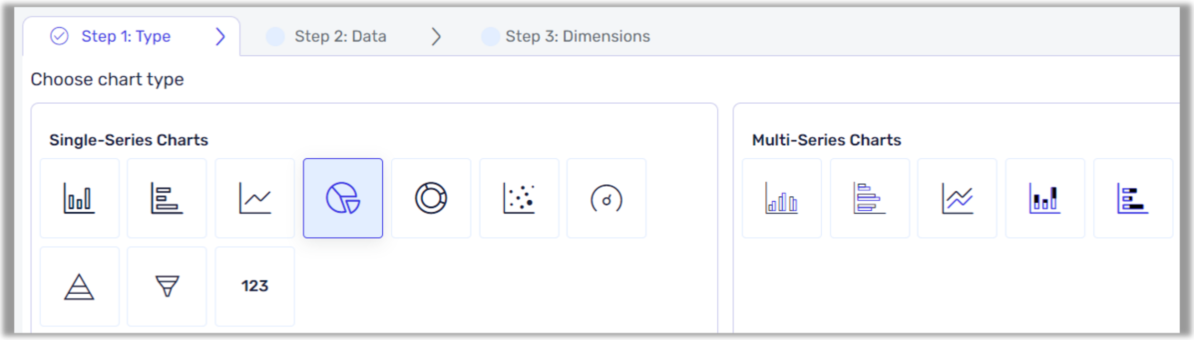
As we continue to develop our innovative Priority Analytics tool, we continue enriching capabilities, giving you the ability to unlock the potential for data analysis in your organization.

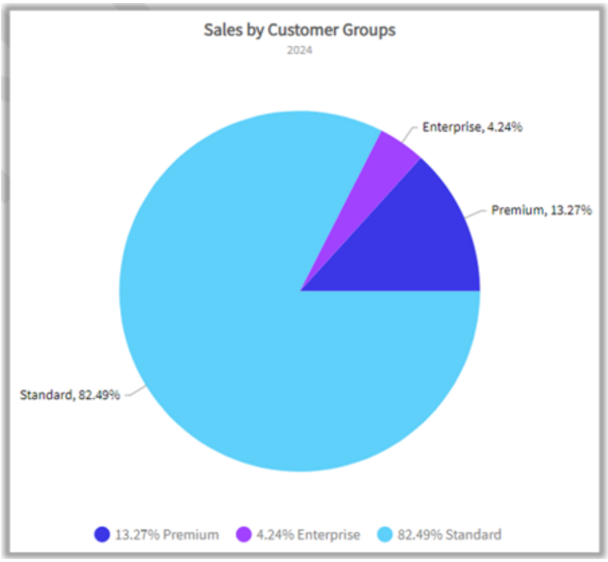
Take your data analysis to the next level. With a rich chart library, customize your data charts with easy-to-use tools and without the need for programming skills.

Now you can visualize your data with outstanding data charts, quickly identify new patterns, and share them with your team.

Easily drill down directly from your chart to explore detailed reports, powering quick, data-driven decisions.

For more information, see the **Priority Analytics** SOP.





New capabilities added to Priority Analytics

- **Tabular Report (Pivot Table)** – When you build a table report, you can now define the report as a Pivot Table, creating a summarized representation of the data for different dimensions.

  For example, you can build a report that shows the total sales for an item by sales reps.

- **Add reports to your menu** – Now you can run the reports you built in Priority Analytics easily and quickly from the system menu. Add reports to the menu the same way as with the traditional report generators, but now you will also see the reports from Priority Analytics. New Behavior Customer Request

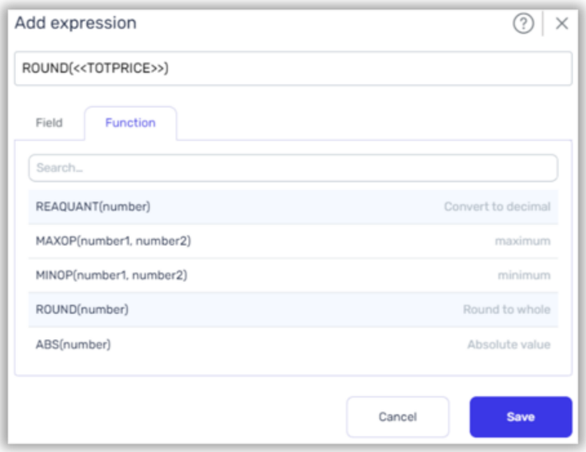
- **Sort data in reports** – Choose how to sort your data in the report; by ascending or descending order. Use the arrows next to the **Sort** column.

- **Define formats for numeric fields** – Choose the format in which numeric fields appear. To do so, use the options in the **Format** column when adding numeric fields to your report.

  For example, you can define the decimal precision or choose to round the number to the nearest thousand or million.

- **Smart Expression column** – Experience a smart and interactive way to write expressions with ready to use functions. To try out this new experience, click on the new  button that you can find next to the **Expression** field.

  For example, in your Sales Orders report you may want to round the **Final Price** field. Create the expression easily and quickly, as detailed in the picture below.



- **See yours only** – Ensure that records appearing in a report will only be those associated with the user who ran the report.

  For example, if you want to see all the sales order assigned to you, just add the **Assigned to** field to the report and mark the **Show Mine** checkbox.

Portal Generator

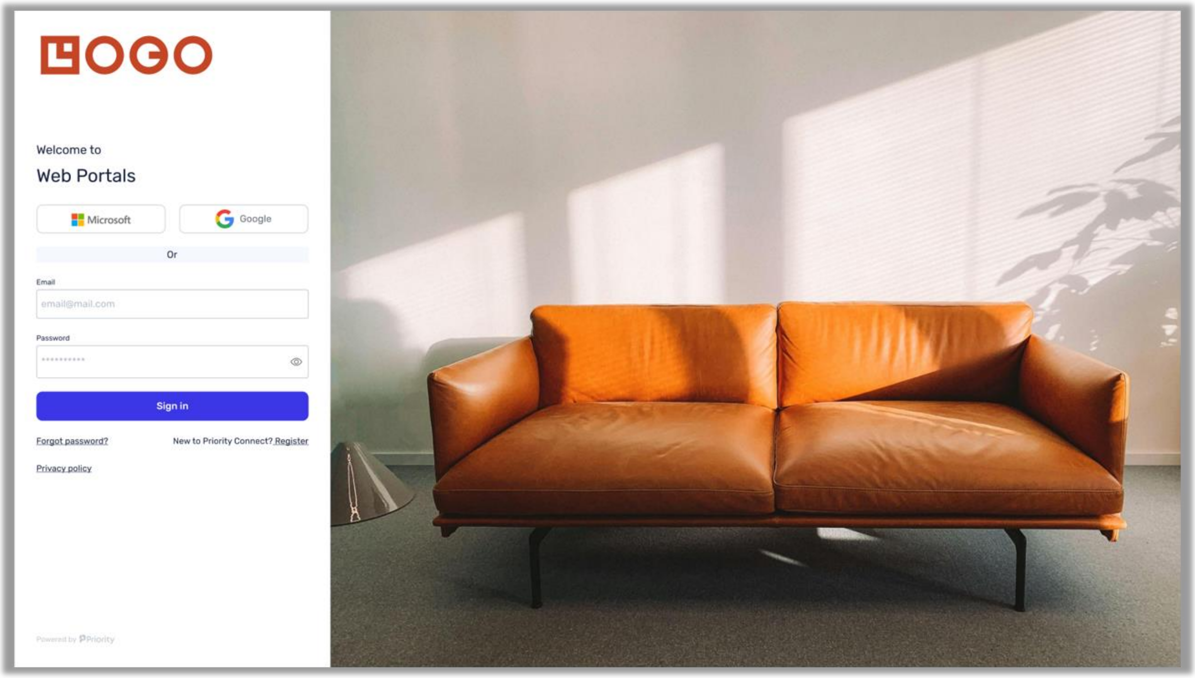
Priority's Portal Generator is the perfect way to build your web page and allow your users and customer and vendor contacts to easily check their account information, open invoices or sales orders, open service tickets, and more.

The Portal Generator is now available for Cloud customers (AWS) for users and contacts. Users can connect either with SSO or otherwise.

You can define a unique login page for your organization with the company logo and a matching background image, along with additional personalization features, such as a main portal color, home page background, and more. This way you can enhance the user experience, and create an impressive, professional look.

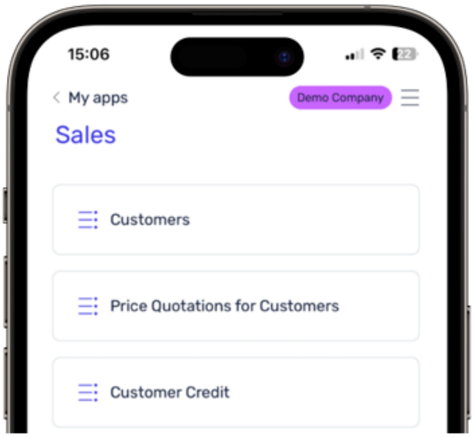
In addition to these capabilities your portal experience has a significant upgrade in usability and look and feel in line with the ***Priority*** rebranding.

Click here for more information.

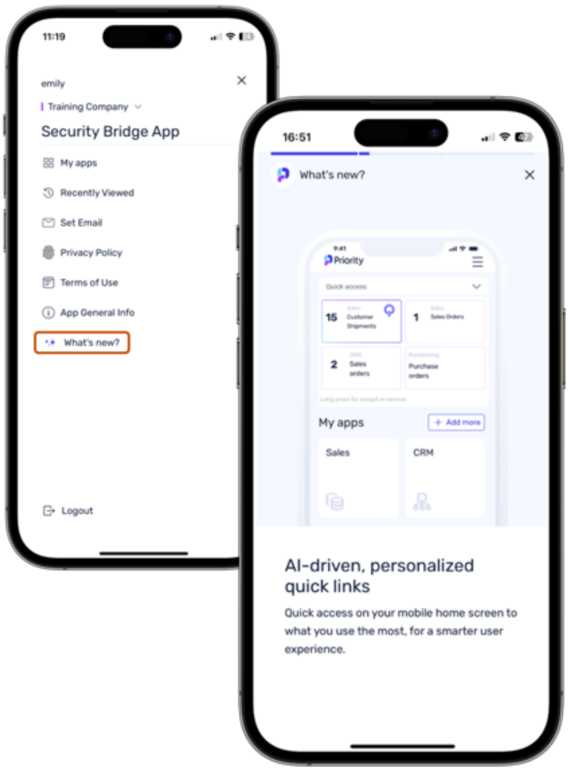


Priority Mobile

- **Company indicator** – Now you can easily see the company you are working in, and switch between companies, from anywhere in the app, with the new company button. The button is color-coded for easy visual recognition.
  Customer Request



- **Announcements** – Check out the **What's new?** area, where you can see stories of the new capabilities you can find in your mobile app.



- **Refresh your app easily** – Now you can refresh your app with a simple swipe, while in the card view of a form. You no longer have to exit the form to refresh. Customer Request
- **Automatically run next actions** – Now you can define an action to run automatically after saving a new record in your app. For example, if you open a sales order, you can define that the **Order Confirmation** program will run automatically once the sales order is saved. Customer Request

- **Empty field indicator** – If you choose a field in the Application Generator and it does not have a value, the field will appear in your app with two lines, signalling that no value exists for the field in that record. Check the Application Generator to make sure only relevant fields are marked to appear in the card view. New Behavior
- **Define saved searches for subforms** – Now you can define saved searches for subforms in the application, giving users easy access to their relevant data. New Behavior

  You can also search for data in subforms using the designated icons, regardless of how much data you have in the subform. Customer Request

Financials

Priority Payments

- **Batch credits** – We added the option to prepare direct debit receipts for credit memos for which the original invoice being credited was charged by credit card. The receipt will have a negative value, and you can send it for processing in a batch, together with receipts with positive values. Customer Request
- **Data level 2/3 for every transaction** – With cost savings and acceptance rates in mind, we now send Data Level 2/3 for every transaction, not just for payments covering a single invoice. This also includes receipts for orders or price quotes. We do this when the **SendDataLevel23** financial constant is set to 1.

Fixed Assets

- **Depreciation definitions from asset to sub-asset** – When a sub-asset is linked to a parent asset, all depreciation definitions from the parent asset will be inherited by the sub-asset. New Behavior Customer Request

General

- **Year-End Wizard** – We are excited to present a new experience for closing the fiscal year with ***Priority***. Now you can use the new interactive Year-End Wizard, that will walk you through all the steps of the process of closing the fiscal year. The Wizard will remind you when you need to perform each step, right on time, and will even perform it for you.

  The Wizard will continue to accompany you until the year-end process is complete.

- **Credit limits for sales invoices** – To prevent bypassing the credit limit mechanism in ***Priority***, we have changed the way ***Priority*** checks credit limits on sales invoices. From now on, the credit check will be part of the process of finalizing invoices and will not be done when opening invoices.

  Note: Using the new **CreditChkOnInvClose** constant, you can prevent invoices from being finalized that would create a deviation from the credit limit. New Behavior

  For more information, see the SOP.

- **Automatic invoice closure during billing** – We added the option to instruct the system to automatically close invoices that open during the billing process. This is particularly useful if your billing process is scheduled via the Tabula Task Scheduler and you have no need to review the invoices that opened during the billing process. Customer Request

- **Scheduled entry reversal** – Now you can schedule the reversal of a journal entry as part of the entry scheduling mechanism. Customer Request

- **Linking deferred payments with bank transfers to ITP** – Now you can define at the bank account level that deferred payments will be transferred to the current account when the ITP file is produced, regardless of the payment date.

Priority

– To better reflect its functionality, we changed the name of the **Cash Postdated Checks** program to **Cash Postdated Payments**, and the **Postdate Chk Acct OUT** field to **Postdate Acct OUT**.

- **Negative linkage in service and rental contracts** – We added support for negative linkage to Service Contracts and Rental Contracts, in the same way we have always supported negative linkage for Sales Orders. Customer Request
- **Indexation in service and rental contracts** – We added support for maximum indexation when working with the index subform in Service and Rental Contracts. Customer Request

Designated Solutions for the International Market

Global

- **Export invoices deprecation for users outside of Israel** – As part of the process of deprecating use of export invoices for companies outside of Israel, announced in previous Release Notes, we are now moving to converting the Export Invoices form to read-only mode, for a transition period. In upcoming versions, the export invoices functionality will be completely removed from the menu for companies operating outside of Israel. New Behavior
- **ShipEngine** – 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:
  – Now your packing slip information can be copied automatically to the **Crates in Shipment** subform, so you no longer need to copy this information manually. This allows you to ship internationally using the updated ShipEngine format for international shipments. Customer Request

  See the **ShipEngine** SOP for more details.

North America

Canada

- **Early payment discounts** – We now support calculations of early payment discounts according to Canadian standards. Early payment discount is calculated on the amount before VAT and is considered during payment.

Europe

- **CBAM Declaration** – In accordance with the EU regulations on carbon emissions, we added support for declaring CBAM.

  See the SOP for more information.

Italy

- **Agreement code** – We added the agreement code associated with sales order transactions to the **Shipping Address** subform. This is particularly useful when working with clients in the public administration sector (B2G). This field will appear in the XML file of the electronic invoice.

Israel

Integration with the Tax Authority

We continue to update the interfaces with the Israeli Tax Authority according to the regulation requirements. Now we offer additional capabilities you can perform digitally straight from within the system.

For more information, see the SOP.

- **Receive or validate allocation numbers and detail invoices automatically**

  Priority allows you to receive allocation numbers for vendor invoices automatically or to validate allocation numbers entered manually in pending vendor invoices that have information in the invoice header or for finalized vendor invoices.

  In addition, you can now detail invoices automatically based on existing information from the Tax Authority. This is particularly suitable for companies where the invoice details are not based on another document and the part numbers are not significant.

- **Taxable amount considered against threshold** – From now on only taxable amounts will be considered against the threshold for requiring allocation numbers, as defined in the **AmountRequiringApp** financial constant.

- **Cancel vendor invoices with allocation numbers** – Now when you cancel a vendor invoice that has an allocation number in a different tax period than the original invoice, the user will be asked to enter the allocation number for the cancelation invoice, under the assumption that the vendor received an allocation number that cancelled the invoice in the system.

- **Donation printout wording** – We added wording to the donation printout, referencing the relevant law by which the donation was allocated as per requirements of the Tax Authority.

- **Donor identification** – When you request an allocation number for a donation invoice, it is now mandatory to specify the donor's identification number or to indicate that the donor wishes to remain anonymous. This is done so that no one forgets to add the donor's identification whereby preventing the donor from receiving a tax donation reimbursement.
  New Behavior

- **Reporting donations received in credit transactions** – Now the system can report donations received on credit in payment transactions in such a way that each payment will be reported separately depending on the period in which it will be billed. This means that ***Priority*** users will not be able to report donations on credit if payments span between years.
- **Allocation numbers in base forms** – Allocation numbers are now available in the base forms for report building and can be used when building reports using Priority Analytics.
- **Reporting advances to the Tax Authority** – We added support for reporting tax advances to the authorities digitally just by using the link to the Tax Authority.

Financials

- **Unified format file upload** – When you upload a file in the Unified format, you now have the option to choose a ZIP file, saving you space and upload time.

Payroll

- **Update employment rates** – We improved the way to update employment rates for your employees. For more information, see the SOP.
- **Payroll Regulation Updates** –
- We added support for the new 2024 regulation of tax credit points for children up to age three.
- We updated Form 126 for 2023.
- We added support for tax credits for finishing an academic or professional degree in 2023.
- We added support for the Freezing and Reducing Convalescence Pay in 2024 for Budgeting Benefits for Reservists Bill, 2024, which proposes that the amount of convalescence pay in 2024 will be frozen and that one day of convalescence pay will be reduced for all workers in Israel for the purpose of financing benefits for reservists.
- We updated Form 100 in accordance with this new law.
- We updated Form 161, in accordance with the Tax Authority's updated wording.
- We updated Form 211 in accordance with Bituach Leumi (National Insurance)'s updated wording.
- We adjusted the reporting method for "in lieu of advance notice" according to Bituach Leumi (National Insurance) regulations.

Priority

- We updated the way in which you report army reserve service to Bituach Leumi (National Insurance).

Approval Lists

- **Multi-company form to approve or decline documents** – For distributed organizations that work in a multi-company configuration in the system, we have added a form in which you can approve and decline documents from all the companies on the installation in a centralized way, efficiently and conveniently, without the need for switching between companies. This option is also available in Priority Mobile.

  For more information, see the SOP.

- **Email approvals** – Now you can see more information in the interactive emails sent for your approval, including project description, additional pricing information, and budget item description. We also added approval list details to the document.

  Additionally, if you your document includes attachments, they will be sent as files in the email.

  Available from version 23.1.

Perpetual Inventory

- **Improving the control and analysis of perpetual inventory accounts** – Now ***Priority*** can perform automatic reconciliations in the Purchases Not Yet Billed and Unbilled Shipments accounts. Use the new **COGSRecon** financial constant, allowing you to enable these automatic reconciliations when you finalize invoices.

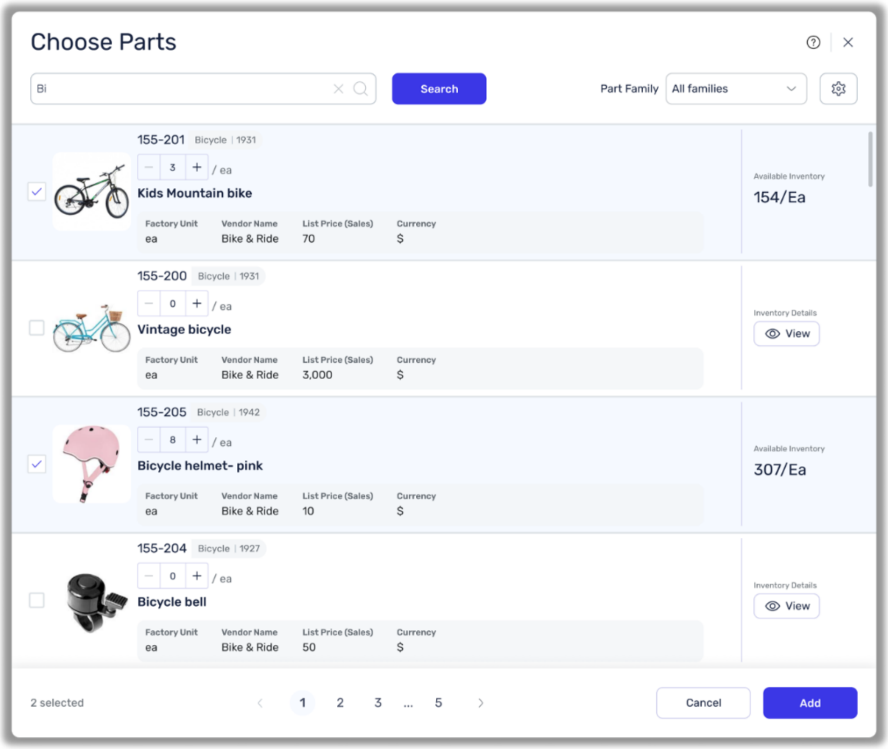
  In addition, the **Unbilled Inventory Account Recon** program can be activated manually or via the task scheduler for transactions that were not reconciled in real time. New Behavior Customer Request

Supply Chain Management

- **Advanced way to choose parts** – Now, when adding parts to documents, you can quickly and easily update the quantity you need for each part, right from the drop-down list.

  For example, to add a bicycle, helmet, and bell to a sales order, you can search for the parts, filter according to part family, update the quantity, and view more relevant details such as pictures, available inventory, and price.

  Easily choose all the parts you want, and the sales order will fill in accordingly.



Do all this using the **Expand** icon from the search list in the Part Number field. You can personalize the details you want to see, according to your needs, using the design settings. Customer Request

- **More characters for tracking numbers** – We increased the number of characters you can enter in the **Tracking Number** field in **Customer Shipments** and **Sales Invoices**.

  In addition, to better suit its functionality, we changed the name of the **Airway Bill** field to the **Tracking Number** in the **Sales Invoices** and **Revision of Final Shipping Doc.** forms. Customer Request

- **More details for raw material lots** – Now using new fields, you can add detailed information, such as the manufacturer name, to your raw material lots, to better identify your inventory. Customer Request

Inventory and Warehouse Management System (WMS)

- **Print packing slip and shipping document** – Now you can print both the packing slip and the shipping document when you finalize a pick task marked as **Automatic Crate Ship**. Customer Request
- **Additional warehouse task definitions** – Have more control and flexibility for managing your warehouse tasks. Now you can find more definitions in the **Mobile Device Messages&Constants** form, such as *Check number of*

different items allowed in bin, or Auto-report of earliest lot in bin (FIFO). Customer Request

- **Time and date for opening pallets** – We added support for the time in addition to the date of which you opened the pallet, for the most accurate FIFO in your warehouse processes. Customer Request
- **Automatic crate code** – Now the crate code will be filled in automatically as soon as you scan the crate's barcode. Customer Request
- **RCV updates GRV** – When reporting identical pallets in an RCV task, the pallet numbers will also be updated in the GRV. Customer Request

Serial Inventory

- **Controls over serial transactions** – We made serial inventory more consistent with actual inventory, when the value of the **lSerialTrans** logistic constant equals 2 (tight control over serial transactions). Customer Request
  - To keep serialized part locations and inventory most consistent, we added further controls over adding transactions that break the current serial transaction sequence. New Behavior
  - To improve inventory control and transparency, we added the **From Warehouse** and **To Warehouse** fields to the **Audit Trail for Item** of the **Catalogue of Parts w/Serial Nos.** form. We also changed the way the form organizes records, so now it is according to the date and then according to the timestamp.
  - The quantity and location of a serialized part is more precise, with more control over the quantity and location of the part in service calls. New Behavior

For more information on working with serialized parts, see the SOP.

Purchase Planning and MRP

- **Choose not to link work orders** – Now the MRP program is more flexible. Using the **MRPUpdWkOrd** production constant, now you can choose not to link work orders that were opened automatically for sales order items. Customer Request
- **Track MRP progress** – Now you can track the progress of the MRP run. This way you can see which stage the program is in and the run time of each stage.

System Administration

- **Identify program end** – In accordance with our work on system performance improvement, with programs that end with an open form, the system will now identify the program as having ended once the form opens, rather than how it has been until now, where the system assumes the program is still running until the form is closed. This will help analyze the system, like for how long programs run. New Behavior
- **Program input** – We expanded the behavior of the system constant **MAXPARAMLINES** (maximum number of records that can be retrieved by a program parameter). Now when you run a program and you drill down from the input to a form, you can retrieve the number of records according to **MAXPARAMLINES** instead of the system constant **MAXFORMLINES** (maximum number of records that can appear in a form). New Behavior
- **Program time limit** – To limit the amount of time in which a program runs, we added a new system constant, **TIMEOUTPROC**, for system self-protection.
- **License refresh** – All users will now receive an indication when their license is about to expire, not only Tabula users.
- **Longer email addresses** – Now you can add longer email addresses, as we added support for up to 68 characters. Note that it is important to check private customizations you may have regarding this. Customer Request
- **Define email accounts for Tabula** – Cloud customers: When a master user sets up an email account, they can now choose to set up a Tabula email account as well. Then they can also define the sender's name (the name that will appear as the sender) for a Tabula user. The need to define a Tabula email account is for emails that are sent from the system, for example, scheduled emails from the TTS. Customer Request
- **Report size limit** – Cloud users will now receive an indication if the report's size exceeds the limit of what can be generated in the system. In any case, the maximum size is 350 MB which allows you to generate extremely large reports.

Developer Tools

- **WINDBI** – Cloud customers can now stop a WINDBI query in the middle of the run manually.

- **ODATA Refresh**– We added an automatic ODATA refresh after running version revisions.