Release Notes *Priority* 17.3

User Interface

All changes in the user interface relate to the ***Priority*** web interface only.

Improvements to Choose and Search Lists

Improvements to Choose and Search lists aim to make ***Priority*** more intuitive and easier to use:

- The and icons allow you to select a value from the list and access the source form in order to view more details or select another value.
- In program and report input screens in which a Search list opens during the input procedure, you can use the option to access the source form.
- The source form accessed from an input screen opens in Query mode. After retrieving you can use the **Choose Value** tool to copy a single value into the input (**F8**), or all the retrieved records (**Esc**).
- In Search lists, the new **Create Record** button enables you to add a value to the list, and the new **Advanced Search** button allows you to access the source form in Query mode in order to find the desired value.
- In the source form, the **Choose Value** tool allows you to copy the value in the current record back into the form in which you are working (**F8**).
- You can use the new scroll bar to scroll through a Choose/Search list (which replaces the Previous Page/Next Page tabs).

More…

General

- **For Mac users:** You can now export data from ***Priority*** to Word.
  Note: Due to Word limitations for Macintosh users, you cannot create new templates in Word.
- In forms, the **New Line** icon and the **Query/Clear Form** icon in the row of shortcuts have been enlarged for easy access. The latter will appear in green when you are in Query mode.
- Improved horizontal and vertical scrollbars allow for faster and easier scrolling within forms.
- Tabs within forms have been redesigned to help differentiate them from sub-level forms.

- On the homepage, when hovering over a form tile with your mouse, a magnifying glass and plus sign appear. Clicking the former opens the form in Query mode; clicking the latter opens a new record.
- From Office 2007, Word has changed the internal structure of the documents it creates to Open XML (*.docx*). This method allows opening and saving Word files in various tools and adds numerous capabilities. To support these capabilities, from ***Priority*** 17.3 of the web interface, the file structure of Word templates has changed to .*dotx*. Any .dot file templates must therefore be converted before moving to version 17.3.

Payroll, Time and Attendance

Payroll Reporting

- From now on, creating payroll reports has become simpler and faster with the new **Batch Payroll Reporting** form. More…
- If you are starting to work in ***Priority*** in the middle of the calendar year, you can use the new **Payroll Reporting Migration** form to record in ***Priority*** pay slips prepared in the previous system since the beginning of the year. You can have ***Priority*** use the tax calculations of the migrated pay slips, as calculated by the previous program, or you can have ***Priority*** recalculate taxes. More…
- In all payroll reporting forms, you can now record the number of hours or days in the **Quantity** column and the system will fill in the relevant columns (hours or days) automatically.

Employee Loans

- You can now easily manage and track loans given to employees in your company:
    - Use the new **Employee Loans** form to record and view employee loan details. Loan payments are deducted from the employee's salary.
    - Create an amortization schedule of payments deducted from the employee's salary by running the **Prepare Amortization Schedule** program by Direct Activation from the form.
    - View amortization schedule details in the **Amortization Schedule** sub-level form or run the **Amortization Schedule** report by Direct Activation from the upper-level form.
    - You can record early repayment of the entire balance of the loan by running the **Redo Schedule for Early Repayment** program by Direct Activation from the form.
    - Run the **Employee Loan Balance** report to view the balance owed by each employee as of a specific date.

  - Run the **Employee Loan Payments** report to view details of loan payments made during a specific period by designated employees.

Sending Password Protected Pay Slips by E-mail

You can now send password protected pay slips to employees by e-mail via the items in the new **Pay Slip Passwords** menu:

- The **Generate Employee Passwords** program allows you to generate passwords for employees, which will be used to access the password-protected pay slips. The passwords will appear in the **Pay Slip Password** column of the **Payroll Data per Employee** form.
- You can send the generated pay slip passwords to employees by e-mail or text message, via the **Send Passwords to Employees** program.
- The **Delete Employee Passwords** program deletes pay slip passwords of specific employees when necessary.

Financials

Journal Entries

- You can now revise the **Reference 2** column in the **Entry Journal** and **Entry Revisions** forms for entries based on any type of purchase invoice.
- You can now split a journal entry for customer or purchase invoices into separate lines for each project linked to the invoice. More…

Accounts Receivable

- Use the new **Cust Receipt Report Generator** to create custom reports for receipts.
- In multi-shipment invoices (and, for non-US users, in export invoices) printed for billing customers in the regular print format, the name of the customer receiving the goods will now appear on the invoice in addition to the name of the billing customer.
- You can now print invoices, in all print formats, with details of work hours (for users who work with the Projects module). To access this feature, use the report design tool.
- Non-US users:
  - You can now prepare one receipt for multiple invoices when running the **Prep Receipts for Standing Order** program.
  - You can now send digitally signed e-invoices when printing a multi-shipment invoice together with a receipt.
  - When printing customer invoices, a new print format, **W/Extended Part Desc.-Sums**, displays the invoice sum in both the local currency and the second currency in adjacent columns.

Accounts Payable

- Non-US users:
    - You can use the new **VATMonthsBack** financial constant to determine the number of months back (up to 24) for which you are permitted to report VAT expenses in the current VAT report period.
    - **Italy:** The VAT report period can now be set according to the transaction date in the **Set VAT Report Period** program (valid only for companies whose country in the **Company Data** form is Italy).
    - In the **Create Additional Checks** program (run by Direct Activation from the **Check Payment (Details)** form, sub-level of the **Receipts** form and the **Over-the-Counter Invoices** form), the number of checks for which you can duplicate details was increased to 60.

General

- The new **Initial Procedure** column, in the **Financial Documents** form, allows you to record the name of a custom procedure defined in the **Procedure Generator** that checks the financial document prior to its finalization.
- The **Hide From Choose List** flag was added to the **Statuses for Shipping Vouchers** and **Statuses-Outgoing Ship Vouchers** forms. When this column is flagged, shipping vouchers/outgoing shipping vouchers with this status will not appear in Choose lists.

Warehouse Management System (WMS) and Other Field Modules

- The new **Inv Storage Age (Mos)** column in the **Part Catalogue** form allows you to determine the maximum number of months permitted between the oldest and newest lot/work order items stored in a given bin. More…
- A new **Limit to Part's Bins** flag was added to the **Bins in Storage Zones** and **Bins in Warehouse** forms. When a bin is flagged, the system will limit the parts that can be stored in that bin to those parts that have the bin listed in the **Possible Warehouse Bins for Part** form (sub-level of the **Part Catalogue** form).
- In putaway and replenishment tasks, the new **IPutInv** constant (in the **Logistics Constants** form) determines whether the system, when recommending high-velocity bins for storage or replenishment, will take into account planned inventory that is meant to be picked from the bin even if it has not yet been reported as removed from it. See Setting Up WMS for more information.

- When running the **Create Replenishment Wave (Inv.)** program, you can use the new **Retrieval Type** input column to choose between replenishing all parts, selected parts and selected sales order items. See Replenish Inventory Tasks for more information.
- You can use the new **Count Frequency-Days** column in the **Aisles in Storage Zone** form (sub-level of the **Storage Zones** form) to define the desired frequency for counting parts in specific aisles. More…
- The new **Unpacked** flag in the **Statuses for Order Items** form enables you to flag order items that have been unpacked for a double check (DCH) task.
- Detailed help has been added to the **Pick Algorithm** form (sub-level of the **Pick Strategies** form).
- Field reps can now open receipts from mobile devices.[1]

Sales

- You can use the new **Customer Part Desc** column that was added to the **Customer Parts** form to record a description assigned to the part by the customer. This description will appear in printouts of the relevant sales documents.
- In various sales documents (e.g., sales invoices), flagging the new **Print Part Attachments** column will add to the document printout all those documents attached to the parts themselves (in the **Documents for Part** sub-level form of the **Part Catalogue** form).

Purchasing

- The new **MRPForecast** production constant enables you to have MRP for Manufacturers take the customer name in forecast orders into account when deducting forecast order quantities from order demands. See Running MRP for Manufacturers and Purchase Planning for more information.
- The new **InvExpiry** planning constant allows you to define whether to take into account expiration dates when running the **Material Requirements Planning** and the **Purchase Planning** programs. See Running MRP for Manufacturers and Purchase Planning for more information.
- The **Block Double Signing** flag, added to the **Authorizer Lists for PRs** form, prevents the same person from signing a purchase demand twice.
- In printouts of purchase orders, the following is now displayed:
    - For each order item, the balance appears as well as the quantity ordered.
    - Each item's barcode appears.

[1]This option will soon be available. Run the **Renew License** program before using it.

- The document number barcode appears in the additional details section of the printout.

- In the **Additional Contacts for Task** form (sub-level of the **Tasks** form), you can now record an additional contact associated with the vendor (as you can already do for customers).

Inventory

- The **Analysis Results** form is now also a sub-level of the **Packed Items** form, enabling you to document the results of quality control tests performed on the packed items.
- You can use the new **Inventory Transactions Rept Gen.** to design custom inventory transaction reports based on the **Audit Trail** form.
- You can now revise the **Customer Name** in the **Catalogue of Serialized Parts** form in the case of a walk-in customer.
- You can now sort the Choose list in the **Work Order/Lot** column of various inventory documents according to expiration date. The sort method is determined by the new **ILotWOSort** logistics constant.
- A new **Parts With No Inventory** report displays all parts with 0 inventory balances in designated warehouses.
- To prevent transactions that would result in negative inventory balances for parts in specific warehouses, flag the new **Block Neg. Balance** column in the **Warehouses** form.

Production

- The **History of Changes** form (sub-level form of the **Parts** form) now displays changes in the **Kit Component** and **Manual Issue** columns in the upper-level form.
- When the **Backflush** program is run, you can now clean inventory for closed work orders (similar to the adjustments that are made when past balances are calculated), in keeping with the value of the new **CleanWOBal** constant in the **Production Constants** form.

Miscellaneous

- The new **E-mail Reply Address** column in the **Personnel File** form allows you to define an e-mail address for automatic replies that differs from the employee's regular e-mail address.
- You can now run the **Open Appointment Calendar** program by Direct Activation from the **Tasks** form. See Working with the Appointment Calendar for more information.
- New log reports can be run by Direct Activation from the **Planning Constants**, **Logistics Constants** and **Productions Constants** forms. Each report displays the changes made to the constant form during the specified period.
- You can now send text messages as XML messages via a supplier's web service. More…

- The **Not in Use** flag was added to the **Service Terms** form. Anything that is flagged in the new column will not appear in Choose lists.
- The **Customer Data Migration** interface now supports migration of the branch linked to the customer.

System Maintenance

- When running the **Send Program Activation Link** program, you now have the option of sending users the service root URL required for programming with ***Priority's*** API.
- A new sub-level form, **History of Changes**, added to the **System Constants** form, allows you to view changes made to system constants.
- Outlook users can now use the **Compose Mail** form (in the ***Priority*** web interface). More…
- Improvements to the **View License Details** report: You can now view a list of all the modules included in your license as well as the number of API and interface transactions used against your licensed quota.

Programming

- The new **EXL2TXT** program converts Excel files to tab-delimited .txt files.
- The new **XMLPARSE** program reads and parses XML files.
- You can now keep track of changes in triggers, procedure steps and loads via the new **Previous Versions** sub-level form and its Direct Activation, **Track Changes**.

For more information, see **SDK for Priority v17.3.**

More Information

User Interface

- After selecting a value from a Choose list, the search icon changes to . You can press the left icon (**More Information**) to access the source form and view details regarding the selected value. The breadcrumbs at the top of the form display the hierarchy of the forms you viewed prior to the current form, helping you to keep track of your location and serving as links back to previous forms.
- In the source form you can search for or retrieve a value and insert it into the form you were in by clicking **Choose and Return (F8)**. To leave the source form and return to the form you were in previously without copying any value, select **Back** (**Esc**).

For more information on new features in the user interface, see the **Data Entry** and **Parameter Input** chapters in the **User Interface Guide** for version 17.3. Back…

Payroll, Time and Attendance

- **Batch Payroll Reporting:** For each employee you record one line per month, detailing the payroll data relevant for that pay slip (e.g., the number of work days and absence hours). After recording data, prepare pay slips in the usual way. Back…
- **Payroll Reporting Migration:** If you choose to recalculate taxes, once pay slips have been prepared, you can run the **Check Tax in Salary** report to compare and reveal discrepancies between the tax data calculated in the two systems. Taxes calculated in ***Priority*** are displayed in the **Compare to** column. If discrepancies are found in the report, you can correct the pay slips as long as they have not yet been finalized. Back…

Financials

- **Splitting Entries by Project:** To split journal entries of invoices into separate lines according to projects, flag the **Distrib btw Projects** column for the A/R or A/P account in the **Entry Patterns** sub-level of the **Entry Codes** form. Back…

Warehouse Management System (WMS) and Other Field Modules

- **Inventory Storage Age:** The value in this column is taken into account in PUT tasks when recommending bins for storage. It is also taken into account when running the **Possible Bins for Part Storage** report. If you input a date in the new **Inventory Storage Date Code** column, the report will recommend storage of a given lot/work order in bins with inventory whose date code falls within the permitted date range. See Setting Up WMS for more information. Back…

- **Count Frequency-Days:** The value in this column will be taken into account when inventory count tasks are opened by the **Create Inventory Count Wave** program when the **By Count Freq-Aisle** option is selected. See Inventory Count (CNT) Tasks for more information. Back…

Miscellaneous

- **Text Messages via Web Service:** To send text messages as XML messages via a supplier's web service, flag the **Send via Web Service** column in the **Text Messaging Definitions** form, and fill in your username and password in the adjacent columns. Back…

System Maintenance

- **Compose Mail for Outlook Users:** If you use Outlook and you want to use the **Compose Mail** form (in the ***Priority*** web interface), flag the new **Use Compose Mail** column in the **Mail Options** dialogue box (menu path: **Options > Mail > Mail Options > Outlook > Mail Options**). Back…