priority™

Data Entry Script

Clip Link:

http://www.priority-software.com/eshbel.com/Movie_Search/Data_Entry_Clip.htm

Note: Yellow highlights indicate action instructions.

Introduction (00:00-00:09)

Hi, this is_____ from Priority Software.
In this video I will demonstrate how to add data to ***Priority*** forms and edit existing data.

Form Structure in *Priority* (0:10-1:07)
For demonstration purposes, let's open the **Sales Orders** form from the **Sales** menu and then the **Orders** menu. The form opens in Data Entry mode, as indicated by the white color of the **Customer No.** column in which the cursor is currently placed. In this mode, you can record data in the form, and they are saved automatically in the system database, with no need to hit a "Save" button. The other available mode is Query Mode, accessed by pressing **F11**, and identifiable by the green color. Since I haven't written anything yet, I can return to Data Entry mode by pressing **Enter**.
Note the red star next to various columns. This indicates a mandatory column. If you record an order and leave one of these columns empty, an error message appears. The gray columns are read-only, meaning they cannot be updated in this form.

Data Entry in Forms (1:08-1:56)
Let's begin filling in the form by selecting the customer for which the order is placed. Open a Choose list by clicking on the arrow to the right of the column name or by pressing **F6**. The list displays customers defined in the **Customers** form. You can scroll through it by pressing **Next Page** or by pressing the **Page Down** button on your keyboard. If the list is long, you can type part of the customer's name, and the list will display the options that match.
Once you choose a customer, a number of other columns are filled in automatically: the customer's name, the **Date** of the order, and the **Order No.**, which is assigned in keeping with a defined order numeration template. The default **Currency** defined for the customer appears as well.

Text Columns (1:57-2:33)
Some forms contain columns in which you can freely record text, as opposed to Choose columns in which you select predefined values, like the customer or sales rep. In the **Details** column, let's record a note concerning the order. Note that when you return to the column to revise the details, the entire text is highlighted. If you start writing immediately, the previous text will be overwritten. To switch to editing mode, press **F2** and use the mouse or arrow buttons to move the cursor to the desired place. Press **Home** to place the cursor on the first character of the text, and edit.

Numerical Columns (2:34-3:04)
Let's go back to the **Date** column, which currently displays today's date. To change the date, you can manually record a new one or choose a number of other options. For instance, you can use the plus "+" button to move the date forward by one day, or the minus "-" button to move it backwards. To postpone the order date by a few days, press the plus "+" button several times. The plus and minus buttons can be used in all numerical columns, not just for dates. In date columns, you can also click the calendar icon and choose the date from the calendar.

Recording Data in Another Form and Saving to the Current Form (3:05-3:58)
Now, move to the **Payment Info** tab. When you open a Choose list, the data that appears is taken from a different form in ***Priority*** – **Customers**, **Sales Representatives**, or, in this case, **Payment Terms**. Suppose that the payment terms on which you agreed with the customer don't appear here, and you want to define new terms while recording the order. Press **F6** from the open Choose list to move to the **Payment Terms** form, and **Ctrl+Enter** to open a new record there. Now fill in the details: record the **Payment Terms Code** and a description, flag the **End of Month** column, and record the number of **Months**. To return to the **Sales Order** form while saving the current selection, that is, filling in the current value in that form, press **F8**. The new payment terms have been recorded in the order, and are also updated in the system, and will appear in all the Choose lists for this column.

Filling Sub-Level Forms (3:59-4:39)
Now I'll demonstrate how to fill in data in sub-level forms, by moving to the **Order Items** sub-level form. Open the Choose list in the **Part Number** column, a mandatory column in this form, and select the desired item. Record the ordered **Quantity** of the current item. You can move between columns using the **Tab** button, the left and right arrows, and of course by clicking with your mouse.
You can see that the **Unit Price** column has been filled in with a price. To understand the displayed price, press **F1** while the cursor is placed in the column, and read the detailed help text for this column. In the case of the **Unit Price**, you can also see the **Price Source** that appears in the adjacent column.

Data Generator (4:40-6:18)
The **Due Date** column is also mandatory, as indicated by its red star. You can record it manually, but you can also set up definitions that will fill in the column automatically once certain conditions are met. To do so, open the **Data Generator** from the **Design** menu. I'll use it to determine that, when a value is defined in the **Part Number** column, the **Due Date** will automatically receive a date that is seven days later than the current date.
Open the Choose list adjacent to "After updating" and select **Part Number**. From the next Choose list, after "set", select **Due Date**. In the third field, you can click on the calendar icon to see if any of the options available here match the rule you wish to set up. If the options shown here aren't suitable for the current rule, you can click on the function key to manually define the terms. In this demonstration, I'll add a predefined expression, and select "current date (w/o time)" to add just the date. Now I'll add seven days: since the basic unit in the

expression is hours, write plus seven, multiplied by 24 to add seven whole days. In the "Valid for" area, you can determine that the rule will be in effect only for yourself, i.e., the user currently defining the rule, or for others too. Only users for whom the **Write Business Rules for All** column is flagged in the **User Permissions** form can set up rules that are valid for other users. I'll leave the system default definitions as is, meaning the rule will be in effect only for the current user. I click **OK** to exit the generator and activate the rule.

Business Rules Generator (6:19-7:39)

Let's move to the **Overall Discount%** column. In orders and many other types of documents, you can define a discount for a specific item in the sub-level form, or for the entire order in the upper-level form. In the following example, I'll demonstrate how to set up a rule that limits the percentage of discount you can define for any order item, so as to prevent exceptionally high discounts in orders. Open the **Design** menu again, and this time select the **Business Rules Generator**. This generator is used to define automatic actions, such as the appearance of an error message or sending an e-mail, if the record meets defined conditions.

Let's choose to display an error message that will appear if users assign items a discount greater than 30%. Move to the "Message" pane and record the message to be displayed. Note that you can add a field to the message,thereby inserting the value of the chosen field into the message. Now, define the conditions: If the value of the overall discount, is greater than, 30.

This time, make the rule valid for all users. Note that instead of an error message, you can display a warning message, which will not prevent the action but only warn users, or send an e-mail message to another user, such as the branch manager, notifying her of the high discount rate.

Undoing Typing (7:40-7:59)

Back in the **Order Items** form, let's see if the rule works: record a discount of 50% and try to go down one line to update the record. The error message appears, so press **Ctrl+Z** to undo the typing. You can use **Ctrl+Z** to erase the last thing you recorded as long as you haven't left the line.

Copying Field Values (8:00-9:57)

Once you move to the next line, the previous line is recorded in the system database. You can go down a line using **Page Down, Ctrl+Enter** or simply by pressing the down arrow. Fill in the **Part Number** and move to the **Quantity** column. Note that the **Due Date** has been filled in automatically, meaning that the rule defined in the Data Generator is working. To copy quantities from the previous line, press **F10**. This shortcut always copies the value from the same column in the previous record.

Let's record another line, with the same **Part Number** this time. If you want to copy a value from the previous line, you can also use keyboard shortcuts, such as **Ctrl+C**, then paste in the new line by using **Ctrl+V**. Alternatively, right-click the column and select **Paste**. Note that many other options, such as copying the field above, are available from this list, and its keyboard shortcut, **F10**, is also displayed.

A third option for copying values is to store values in buffers. Buffers allow you to store multiple values, as opposed to simply copying a single value by pressing **Ctrl+C**. Suppose you want to copy the **Part Number** from the first and second items, and paste them in the fourth and fifth lines. Place the cursor on the **Part Number** column in the first line and press **Ctrl+F9**. The value is stored in a "cell" identified by the number recorded here - in this case, 1. You can designate any one- or two-digit number you want. Repeat the action in the second line, this time assigning the buffer a cell number of 2, which appears automatically, since the system "recognizes" that number 1 is already taken. In the fourth line, press **F9**. "1" appears by default, so simply press **Enter** to paste the first stored value. In the fifth line, press **F9** again and this time make sure the number "2" is recorded, then press **Enter**.

Deleting Records (9:58-10:41)

A couple of redundant lines have been added to the **Order Items** form. If you haven't left the record yet, meaning you are still in the same line, you can press **F7** to clear this line from the form. **F7** usually removes records from the current display, but in this case, since this is a new record and has not yet been stored in the database, the line is removed and will not be registered in the system.

The previous line, on the other hand, *has* been recorded in the database, which happens when you leave the line. To erase it, click the icon or press **Ctrl+Delete**. In some cases, you may not be able to delete a record at all. For example, you can't delete line items in an approved sales order.

Storing and Retrieving Multiple Records (10:42-11:35)

You can copy items into the new sales order from an existing record, and in fact copy the entire content of any sub-level form into the same sub-level of a different record. Move to the relevant record, then to its sub-level. From the **Edit** menu, choose the **Store Records** option to copy all the items in the form. In the dialogue box, choose the cell in which to store the records. Now return to the upper-level **Sales Orders** form and open a new sales order by pressing **Page Down**. Then, choose a customer. Select **Retrieve Records** from the **Edit** menu, making sure the same cell number appears. The items are copied into the sub-level form. Note that you store the records in the buffer while in the sub-level form of the source record, but you retrieve them into the target record while in the upper-level form.

Summing Values (11:35-12:15)

Let's look at the **Order Total** sub-level form, in which the total prices for the order are displayed, before and after discounts and taxes. This is useful for viewing an interim summary of the order while itemizing it, but perhaps you want to add data that is not displayed in the **Order Total**, such as the **Profit** column in the **Order Items** form, which takes into account part costs and prices. If you right-click the column title, you can see a sum total of all the values in the column. To obtain a subtotal of the values from the beginning of the column up to a certain line, place the cursor on that line and press **Ctrl+F8**.

Sending a Record Link (12:15-12:34)

Let's go back to the upper-level form to demonstrate additional actions. You can send a link to this record to other users by pressing **Ctrl+S**. This opens an e-mail message containing

a link which leads directly to this record in ***Priority***. This option is also available from the **Mail** menu.

Text Forms (12:34-14:30)

Another kind of data entry in ***Priority*** is recording remarks in text forms, such as the **Sales Orders – Remarks** form. The form may display a set text for sales orders, if one was defined. You can edit the text for an individual order.

All the standard functions of text editors are available in text forms in ***Priority***: cutting, copying, pasting and deleting. You can perform these actions from the toolbar or use standard keyboard shortcuts, like **Ctrl+X**. You can also format the text, and add hyperlinks and images.

In addition, you can add a personal signature, appended to the text messages you edit. From the upper **File** menu, select **User Signature**, and select the second option – **in Text Forms**. In the next screen, determine the text and design of the signature: whether to include a separating line, a date and so on. Some of the signature definitions, like title and position, are filled in based on data from the user's **Personnel File**. The signature will appear when you click the **Add a Comment** button.

The content of the **Sales Orders – Remarks** form will appear in printouts of the order. In addition to recording text that is visible to the customer, you can use a separate form to record internal remarks intended only for company employees. To do so, move to the **Internal Dialogue** form. Click the **Add a Comment** button to add your signature, then record the text. The content of the text forms is saved automatically every couple of minutes, and when you leave the text form.

You can also add a link to other ***Priority*** records that works like a regular hyperlink. For demonstration purposes, let's paste a link here to a prospective vendor for this order. Record the relevant text and move to the vendor record. Press **Ctrl+Y** to copy the link, then return to the text form and paste using **Ctrl+V**.

Attachment Forms (14:30-14:47)

You can attach files of any type to a variety of records. In the **Attachments** sub-level form, press the folder icon, and import the file. The folder icon changes to match the file type, and, if the file is an image, a thumbnail of that image is displayed.

Macros (14:47-15:48)

Macros are another powerful editing tool available in ***Priority*** forms. Macros are used to automatically perform a sequence of several actions such as mouse clicking and keystrokes, in order to carry out a particular operation. Note that there is no way to undo actions that are performed using a macro, so use caution when doing so.

Let's use this sample order to demonstrate how to create a macro that deletes records. Begin by choosing the **Start Definition** command from the **Run > Macros** menu, and recording the name of the macro: "Deletion". On the bottom left corner of the screen a row of icons appear. The rightmost icon () indicates that the macro is now being recorded, so perform the actions to be included in the macro in their normal sequence: press

Ctrl+Delete, then the left arrow key, then **Enter**. And finally, click the **End**  icon to stop recording. You can now perform the same actions by executing this macro.

Defining a Macro Hot Key (15:48-16:19)

To make macro usage even easier, you can assign hot keys to activate each one. This eliminates the need to open the **Run** menu in order to execute a macro. To assign a hot key, activate the **Select a Macro** command, move to the desired macro and specify a number between 0 and 9. And finally click **Set Key**. So now you can simply press **Alt+1** at any time to execute this macro.

Defining a Recursive Macro (16:19-17:33)

In order to delete a large number of records, it is possible to define a **recursive macro**, which repeats the recorded actions a number of times, depending on the value of the **RECURSIVEMACRO** constant. For example, if the value of the constant is 20, the action will repeat 20 times, and in this case, delete 20 rows. The process for defining this type of macro is very similar to the one for a regular macro, except that in a recursive macro, the **Select a Macro** command itself is included within the definition.

To define a recursive macro, select the **Start Definition** command again and assign the macro a name in the pop-up dialogue box. I'll use the name “Deletion” again and overwrite the existing macro.

Once again, perform the same sequence of actions: press **Ctrl+Delete**, then the left arrow key, and then **Enter**. Next, click the **Select a Macro** icon, choose the macro you just defined, and select **Execute**. And finally, click the **End** icon to stop recording. You have created a loop in which one of the actions performed by the macro, is running the macro itself, which is then repeated a number of times. To stop the macro while it is running, press **Ctrl+Break**.

Recording a New Order (17:33-17:50)

After you have finished entering all the data for the sales order record, you can open a new record by pressing **Page Down** or **Ctrl+Enter**, and filling it in as demonstrated. To exit the form, press **Esc**.

This concludes our explanation of basic data entry tools in **Priority**.

Related Documentation

- Navigation clip
- Form Design clip
- Data Retrieval and Queries clip
- User Interface Guide
- Sales Orders clip