

Learning Aids Script

Clip link: http://www.priority-software.com/eshbel.com/Movie_Search/Learning_Aids_Clip.htm

Note: Yellow highlights indicate action instructions.

*HEADINGS ARE NOT MEANT TO BE READ ALOUD.

BEFORE YOU BEGIN: START WITH BLANK SCREEN, MODULE MENU OPEN, NO FORM OPEN. MAKE SURE THE FONTS FOR THE MENU ITEMS AND THE FORMS ARE CORRECT AND THAT YOU CAN SEE THE FULL TITLES OF COLUMNS WHEN YOU OPEN THE FORMS. IF NECESSARY, HIDE COLUMNS TO MAKE THE SCREEN PAINTED FORMS LESS CROWDED.

MAKE SURE YOU'RE SIGNED OUT OF YOUTUBE (OR NOT SIGNED IN AS AN ADMIN OF OUR YOUTUBE CHANNEL) BEFORE RECORDING THE SECTIONS ON OUR YOUTUBE CHANNEL

Introduction (0:00-0:55)

Hi, I'm _____ from Priority Software.

In this video, I will present and demonstrate the various help options available to you in **Priority**. In the upper **Help** menu, [ZOOM-IN TO HELP ICON, CLICK] you'll find a number of different Help tools. It is advisable for new users to get to know these tools as well as the various help options built into the system. One of the most useful tools for new users is the **Keys and Functions** chart accessible from the **Help** menu. [POINT ARROW, OPEN] You can print it out and use it as a reference while you get to know the system. [CLOSE]

You can right-click any entity in **Priority** and choose **Online Help** to access a list of the various help tools available for the entity. [OPEN CRM > Customers RIGHT CLICK ON THE CUSTOMERS FORM AND SELECT Online Help] The list will include links to relevant video tutorials, [HIGHLIGHT] Standard Operating Procedures [HIGHLIGHT] and Frequently Asked Questions. [HIGHLIGHT, CLICK TO OPEN, CLOSE] You can also access the video tutorials on **Priority's** website, or by clicking **Learn Priority** in the **Help** menu. [POINT, CLICK TO OPEN]

Video Tutorials (0:56-1:26)

This opens a page from which you can browse the available videos by topic. [HIGHLIGHT LEFT PANE, CLICK THROUGH LIST OF TOPICS] The page you open may look slightly different than this page due to changes that appear when new videos are added. Click the video to open it in a new page [OPEN A VIDEO] where it can be viewed. You can download the transcript for any clip for easy reference [POINTARROW] by clicking the PDF icon that appears next to the video. Click the YouTube icon at the bottom of the window to view the video on the YouTube website. [POINT AND OPEN] To receive updates about our latest

videos, subscribe to our YouTube channel. [CLICK SUBSCRIBE BUTTON] [RETURN TO PRIORITY]

Help – F1, Ctrl+F1 (1:27-2:26)

One of the main help features in *Priority* is the help screen for menu entities, programs, reports, forms and form columns. To view a definition of any menu item, right-click the item and select **Help**. [EXPAND MENU, DEMONSTRATE] A text box will be displayed with a description of the entity and its function [CLOSE AND COLLAPSE THE MAIN MENU].

When working in forms, [OPEN A FORM FROM THE MAIN MENU] press **F1** from within a column [CALLOUT F1] for an explanation of the column, or right-click and select **Help** from the options displayed. [DEMONSTRATE] For an explanation of the entire form, press **Ctrl+F1**. [CALLOUT CTRL+F1] Right-clicking a sub-level form [DEMONSTRATE] or Direct Activation [DEMONSTRATE] will also display the relevant help.

F1 can be used in the same way while running a program or report [RUN Sales > Orders > Sales Order Reports > Order Confirmations > Order Confirmation]. The help usually appears on top of the screen, [POINT] and if you're not sure what an input parameter is used for, press **F1** within the column for an explanation or click the **Help** button here. [DEMONSTRATE, THEN CLOSE]

FAQs (2:27-3:09)

When questions arise about a specific topic in *Priority*, you can right-click the entity in question from the menu [OPEN Financials > Accounts Receivable > Customer Invoices AND RIGHT CLICK ON THE Receipts FORM] and choose **Online Help** [HIGHLIGHT] to see all the **FAQs** on this topic, as demonstrated earlier. Alternatively, select **FAQs** from the **Help** menu [DEMONSTRATE] to open an FAQ search page where you can enter a search term [RECORD: INVOICE AND CLICK GO] or browse the menu until you find the subject you're looking for. [DEMONSTRATE]

When you open service calls on the Priority Software web site, [CLICK CUSTOMER ZONE, THEN ON THE WEBSITE CLICK OPEN SERVICE CALL] you must enter one or more keywords that briefly describe the issue in question: for instance, "sales rep" [ENTER KEYWORDS AND CLICK GO]. An automatic search in the FAQ database will return any solutions that may potentially address your issue [HIGHLIGHT FAQs THEN CLICK TO OPEN ONE] before you open the service call. [CLOSE AND RETURN TO AN OPEN FORM]

Tooltips (3:10-3:27)

Another useful help feature is available in the form of Tooltips that are scattered throughout *Priority's* interface. Simply **hover your mouse over any of the shortcuts, [POINT TO ROW OF SHORTCUTS] icons [POINT TO FAVORITES] or commands in the Options menu [DEMONSTRATE] or form columns [DEMONSTRATE]** for additional information to appear.

SOPs (3:28-4:05)

More comprehensive instructions for many typical business scenarios are provided in *Priority's* Standard Operating Procedures or SOPs. These can be accessed from the **Online Help menu [OPEN Financials > Accounts Receivable > Customer Invoices, RIGHT CLICK ON THE Receipts FORM AND SELECT Online Help]** and can be identified by the PDF icon. **[POINT, CLICK TO OPEN, THEN CLOSE]**

You can also find a list of all available SOPs in the Customer Zone of our website. From the **Help menu, [CLICK CUSTOMER ZONE, THEN ON THE WEBSITE CLICK DOWNLOADS, PRIORITY DOCUMENTATION] select Customer Zone, Downloads, and Priority Documentation. Then, under Topics, select Standard Operating Procedures. [CLICK, OPEN, THEN CLOSE AND RETURN TO AN OPEN FORM]**

Wizards (4:06-4:52)

As opposed to the help tools mentioned above that document a specific problem or scenario, a Wizard provides a comprehensive explanation of a broad topic. Wizards are linked to various menu items and can be opened from the main menu. **[EXPAND MENU AND POINT TO A WIZARD]** They are easily identified by the **W** icon. **[HIGHLIGHT]** You can also retrieve Wizards via the **Search for Entity** tool by entering a relevant keyword **[TYPE IN "GL Accounts" THEN OPEN THE RETRIEVED WIZARD]**.

You can browse through a Wizard by clicking on various links. **[DEMONSTRATE]** Wizards open in a separate window enabling you to simultaneously work in the appropriate form while referring to the open Wizard. **[PLACE WIZARD AND FORM SIDE BY SIDE]** You can also open the reports, programs and forms mentioned in the Wizard by clicking on the links within the Wizard itself. **[DEMONSTRATE]** You can return to the beginning of any Wizard at all times by clicking the Home button at the bottom of each topic. **[DEMONSTRATE THEN CLOSE THE WIZARD]**

User Interface Guide (4:53-5:10)

Finally, you can review *Priority's* User Interface Guide, which can be accessed from the **Help menu. [DEMONSTRATE AND OPEN]** This document outlines the basic elements of working with the system, including commands and keystrokes; the structure of menus, forms, reports and programs; and more. **[CLOSE]**

This concludes our demonstration of help options in ***Priority***.

Related Documentation

- User Interface Guide
- Navigation clip
- BPM clip