priority

Multi-Company Forms Script

Clip Link:
http://www.priority-software.com/eshbel.com/Movie_Search/Multi_company_forms_clip.htm
Note: Yellow highlights indicate action instructions.

*HEADINGS ARE NOT MEANT TO BE READ ALOUD.

BEGIN WITH THE PART CATALOGUE FORM OPEN (MENU PATH INVENTORY > PART CATALOGUE)

Introduction (00:00-00:29)
Priority enables authorized users to define and work in an unlimited number of companies. Each company can utilize some or all of the active modules, while storing its own data independently of the others. That is, the available forms, reports and programs will be the same for all companies, but for the most part, the data that is stored and displayed will be unique to each one.

Selecting a Company Environment (00:30-01:00)
If your organization maintains several different companies, each user will be prompted to select the company environment in which he or she wants to work the first time they enter the system. In all subsequent entries, the company last accessed at this workstation appears automatically. However, authorized users can change the company environment in which they are working at any time by choosing the **Select Company** command from the upper **File** menu[DEMONSTRATE].

Basic Data Shared Between Companies (01:01-01:56)
Certain basic data is shared automatically between all company environments, regardless of the company environment in which they are defined. The pieces of data that are shared, include user and employee records[OPEN Personnel File FORM FROM THE Human Resources MENU], ***Priority*** calendars and mailboxes[OPEN MAILBOX FROM TOOL TRAY], print formats and color conditions in forms. Moreover, any changes that you make to the design of a ***Priority*** entity in one company (such as., hidden fields, custom tabs, menu item order)[DEMONSTRATE IN Organize Fields DESIGN TOOL] appear in the same entities in all companies.

Setting up Company Details (01:57-03:20)
You can assign a distinct color to the title bars of forms and menus as a visual aid to differentiate between the companies in the system. This makes it easier to keep track of which company environment you are working in at any given time, as we'll see in just a bit. To do so, enter the **Companies** form[MENU PATH: System Management > System Maintenance > Companies], move to the appropriate line and select the **Color** to assign to the title bar of this company. Dual-currency users can also define each company's primary **Language**, if it differs from the system's base language.

Notwithstanding the distinction between companies in terms of separate databases, data management, definitions and privileges, the system also allows for data flow between companies.
For example, ***Priority*** can make general financial maintenance for all companies more efficient by automatically updating exchange rates in all companies comprising the multi-company enterprise. To share currency exchange rates across several different companies in the system, flag the **MultiCo Exch Rates** column for each participating company. Thereafter, any rates specified in one flagged company are updated automatically across all flagged companies.

Converting Forms to Multi-Company Format (03:21-04:06)
If you are responsible for managing the data of multiple companies within your ***Priority*** system, you may occasionally want to view all relevant data from any of these companies in a single, multi-company form. Users with system manger privileges have the option of converting almost any system form into a multi-company form, by running the **Convert to Multi-company Form** program[MENU PATH: System Management > System Maintenance > Advanced Design > Advanced Form Design] for the desired form. For this example, we're going to demonstrate working with multi-company data in the **Part Catalogue** form[LOGPART].

Working with Multi-Company Forms (04:07-08:02)
When working with multi-company forms[REOPEN THE Part Catalogue FORM; MENU PATH: Inventory > Part Catalogue], each user has the option of selecting the companies whose data they want to view. Simply open the **File** menu from the Top Bar and select **Define Multiple Companies**, then flag each company for which you want to display data. This selection, which applies to each user individually, remains in effect for every multi-company form or report in the system, until the user changes it. However, one user's selection does not affect the data that other users see.
Each record in a multi-company form may originate from any of the selected companies. Let's run a query that retrieves all parts whose catalogue number begins with the numbers 111[PRESS F11 & SEARCH FOR "111*"]. The company of each line item is designated in the **Full Company Name** column[MOVE TO LAST TAB+COLUMN], which appears in all multi-company forms.
Additionally, users can see which company environment they are working in at any point by checking the company name - and its color - which appear throughout the interface[POINT OUT: FORM TITLE BAR, TOP OF MAIN MENU, TOP OF FORM NAVIGATION PANE].
As you move from record to record within the form, you are actually moving from one company environment to another[HIGHLIGHT Full Company Name COLUMN AND FORM TITLE BAR TO ILLUSTRATE]. So, for instance, any Choose lists for the record are populated with values defined for that company[USE Pref. Vendor COLUMN IN Details TAB TO DEMONSTRATE IN RECORDS FOR TWO DIFFERENT COMPANIES], and when zooming from these lists to a related form, the form will be opened within that

company[POINT OUT FORM TITLE BAR, THEN PRESS Esc TO RETURN TO Part Catalogue].
When adding a record to a multi-company form, the record is added to the company in which you were working when you first entered the form. Once you leave the record, the name of this company appears automatically in the **Full Company Name** column[HIGHLIGHT].
You can return to the **Define Multiple Companies** dialog box at any time to change the companies for which this form (and all other multi-company forms and reports) is defined. When doing so, keep in mind that if you do not have the exact same privileges for a given multi-company form in all of the selected companies, you will receive an error message upon entering that form, and the form will open for the default company only. To determine what your privileges are in the companies in your system, speak to your system manager.
Should you wish to revert any multi-company form back to its original single-company format, ask the system manager or another authorized user to run the **Revert to Single-company Form** program[POINT; MENU PATH: System Management > System Maintenance > Advanced Design > Advanced Form Design] for the desired form.

Consolidated Financial Statements (08:03-09:11)
Like multi-company forms, multi-company reports include data from some or all of the companies at once. Most multi-company reports fall into the category of consolidated financial statements, such as aging and customer credit reports. These reports include data from each company that the user selects in the **Define Multiple Companies** dialog box. If no companies are defined in this way for a particular user, consolidated reports run by that user will include whichever companies have been flagged as **Multi-company** in the **Companies** form.
For this example, let's run the **Customer Credit** report[MENU PATH: Financials > Accounts Receivable > Customer Credit] to view customer credit in a multi-company setting[FLAG Multi-Company OPTION]. For each customer that is designated in the input dialog box[CLICK OK], the report displays the amount of credit currently being used in each company, the total in all companies and the customer's multi-company credit limit[DEMONSTRATE IN REPORT].

Electronic Data Interface (EDI) (09:12-10:22)
In some organizations, you may also want to set up ***Priority*** to run an electronic data interface (EDI) to exchange routine business data between companies that work on either the same or different ***Priority*** servers. For instance, a manufacturer can automatically exchange order and shipping information with various retail outlets. You can even maintain separate part numbers at the manufacturing company and the retail outlets, while still maintaining an accurate overall view of the current inventory status at each location. This module is especially useful for supply chain management.
The ability to store data separately for several companies is particularly important in a multi-company business, but can also prove useful in small companies. For example, you can

use this tool to create a simulated work environment, in which you can learn and experiment with the system without affecting your company's real data.

Related Documentation

- Companies wizard
- User Privileges clip
- Data Retrieval clip
- User Interface Guide