priority™

Navigation Script

Clip Link: http://www.priority-software.com/eshbel.com/Movie_Search/Navigation_clip.htm

Note: Yellow highlights indicate action instructions.

Introduction (0:00-0:46)
Hi, I'm _____ from Priority Software.
In this video I will demonstrate how to navigate within the web-based ***Priority*** Rich interface. Let's start with a short explanation of the home page where I am now. Here in the center are shortcuts to forms, reports and other entities in the system. You can add shortcuts by clicking on the plus sign. In the **Recent Items** pane on the right, you'll find the entities that you used recently such as forms that you opened or reports or programs you ran. Below this, in the **Latest Updates** pane, you can view active records that are linked to you that have recently changed.
Above the tiles is the Search window which will help you find various records in the system, such as invoices, orders and customers.

The Main Menu (0:47-2:16)
This is ***Priority***'s main menu bar. It is divided into content areas such as **Financials, CRM,** and **Sales.**
Click on one of the menus to display a list of relevant entities, which are divided into sub-menus according to topic. For example, from **Sales**you can see sub-menus such as **Orders** and **Price Quotations** and by clicking on **Orders** you'll see the **Sales Orders** form, a menu of reports pertaining to orders and more. Click on the left mouse button and the form will open; right-click the form and an options menu will open. For example, you can view **Help**for this form or, by clicking **Online Help**, you can access various Help tools for this form such as videos, Standard Operating Procedures, and FAQs. Notice the **Add to Favorites** and the **Add to Home Page** options
Here on the left you'll notice a magnifying glass:o find a form in the menu, record the form's name, or part of the name, and the system will retrieve forms, reports or programs that meet the search term. From here you can open the form, view the path so that next time you'll be able to find it in the menu, or even add it to your home page for easy access.
The name of your company appears here on the right. To change to a different company, just click the company name.
To learn more about the upper tool bar, let's open a form.

The Options Menu (2:17-3:28)
The arrow here on the righthides the main menu, for those who prefer to work only via the shortcuts on their home page and Favorites list. This three line icon is the Options menu and it includes a variety of actions: For example, from the **File** menu,you can change the

language you're working in, or define your user signature. From the **Mail** menu you can define the settings used to send e-mail from within ***Priority***.
The question mark on the right is the **Help** menu that includes links to the Customer Zone, to video tutorials and to ***Priority***'s FAQ page where you can find answers to frequently asked questions on specific topics.
Moving to the left, you'll see your user nameand next to it an icon indicating the number of screens that are open. The number "4" appears here because I have four screens open. Click the number to view a list of all the open forms; they are also displayed here, on the bottom right. From this window you can close all the forms, or all forms except the one you're working in.
On the upper left-hand corner is your Favorites menu,and next to it is the ***Priority*** button that will bring you back to the home page from any screen.

Forms (3:29-6:08)
Now I'll explain how to work in ***Priority*** forms. I won't discuss data entry or retrieval at the present time as these are explained in other tutorials.
When in form display, the screen is divided into several central areas. I've numbered them for demonstration purposes. The first area, where the name of the form appears - in this case **Sales Orders** - is called the upper-level form. This area is used to record basic information about the order, such as the customer number and date. To demonstrate, I'll retrieve several orders. Notice the form navigation pane on the right, where the number of retrieved records is displayed. This pane lists information that will help you find your way around while you work, as you'll see.
The **Sales Order** form opens in Full-Record Display Mode which displays one full record at a time. In this mode form columns are divided into tabs. You can move between tabs by pressing **Shift** and the right and left arrow keys or simply by clicking the tab with your mouse. Note that this display mode is fully customizable, allowing you to organize the columns to meet your needs and display them in custom tabs.
In order to see multiple records at a time, press **F4** or click the iconto toggle to Multi-Record Display Mode, which presents all of the form's records in a table. This mode is particularly useful for viewing the retrieved orders in list form, while full-record mode is useful when filling in the details of a specific order.
While I'm here, these icons are shortcuts that will assist you in performing various operations in the system. For example, you can add a form to your **Favorites**, retrieve records, undo an action or send to Excel.
Let's go back to the form. To move between columns, use the **Enter**, **Tab** or **Shift+Tab** keys, or click with your mouse. To move between records when in Full-Record Display Mode, use the **Page Up** and **Page Down** keys. Alternatively, use the vertical scroll bar here on the left.
In ***Priority***, you have the option of drilling down to related forms from within the form itself, allowing you to view pertinent information in the target form without ever leaving the original one. Once you arrive at the target form, you can add new records, revise existing ones and

copy values back to the original form. For example, in this order, pressing **F6** twice in the **Customer No**. column will open the **Customers** form, where you can view the details of the customer relevant to the order. For example, you can add a contact for the customer and return to the order by pressing **Esc** or by clicking in the form navigation pane. Now you can continue processing the order by selecting the new contact from the Choose list.

Sub-level Forms (6:09-7:28)

The area below the order contains the sub-level forms. These provide detailed information regarding the record displayed in the upper-level form. So, for example, **Order Items** is used to list the items in the current sales order. Note that the sub-level form automatically opens in Multi-Record Display Mode, but this can be changed by pressing **F4** or by clicking the icon on the row of shortcuts as you saw previously

Any sub-level form can have sub-levels of its own. Indeed, the **Order Items** form has many of its own sub-level forms. Each sub-level form is linked to the record in the form above it. For example, the **Order Tracing** sub-level displays the inventory transactions for this item in this order. If you move to a different item in the order, different transactions will be displayed. In addition to **Order Items**, **Sales Orders** has many other sub-level forms that hold information related to the order. You can use the design tools to hide sub-level forms that you don't need, or to change the order in which they appear.

Sometimes it's easier to view the sub-level forms in a list. Press **F5** to open a list of sub-level forms.Then, double-click the desired form, for example, the **Order Items-Remarks** form, to open it. Now you can record remarks related to the order that will appear in the printout for the customer.

Direct Activations (7:29-8:06)

Now let's focus on the Direct Activation pane. Direct Activations are programs, reports and forms that are relevant to the document you're currently working on. For example, you can run a program that will open a purchase order based on a sales order, if the ordered items are out of stock. Now, move to the **Order No.** column and then click **Purchase Orders** from the list of Direct Activations. The form will open displaying the appropriate purchase order. To go back to the sales order, press **Esc**. Note that the Direct Activations in the form can also be displayed as a list by pressing **Ctrl+F5**. Browse through the list and select the desired action.

Active Screens (8:07-8:59)

You can, of course, open several screens simultaneously. All of the open screens will appear here in the **Active Screens** pane, as well as in the top right corner, as shown previously. You can use the **Ctrl** key and the up and down arrows]to move through the list of screens. The selected screen will open when you release the **Ctrl** key. Right-click a screen to close it or to close all of the open screens.

We mentioned a number of keyboard shortcuts in this tutorial. To help you remember them, open the **Keys and Functions** document from the **Help** menu, print it and use it as a

reference when beginning to work with ***Priority***. When you're finished working in the form, you can close it by clicking the icon or by pressing **Esc**.

This concludes our explanation of navigation in ***Priority.*** For more details, see the **User Interface Guide**, available in the **Help** menu.

Related Documentation

- Data Entry clip
- Data Retrieval and Queries clip
- Form Design clip
- Business Intelligence clip