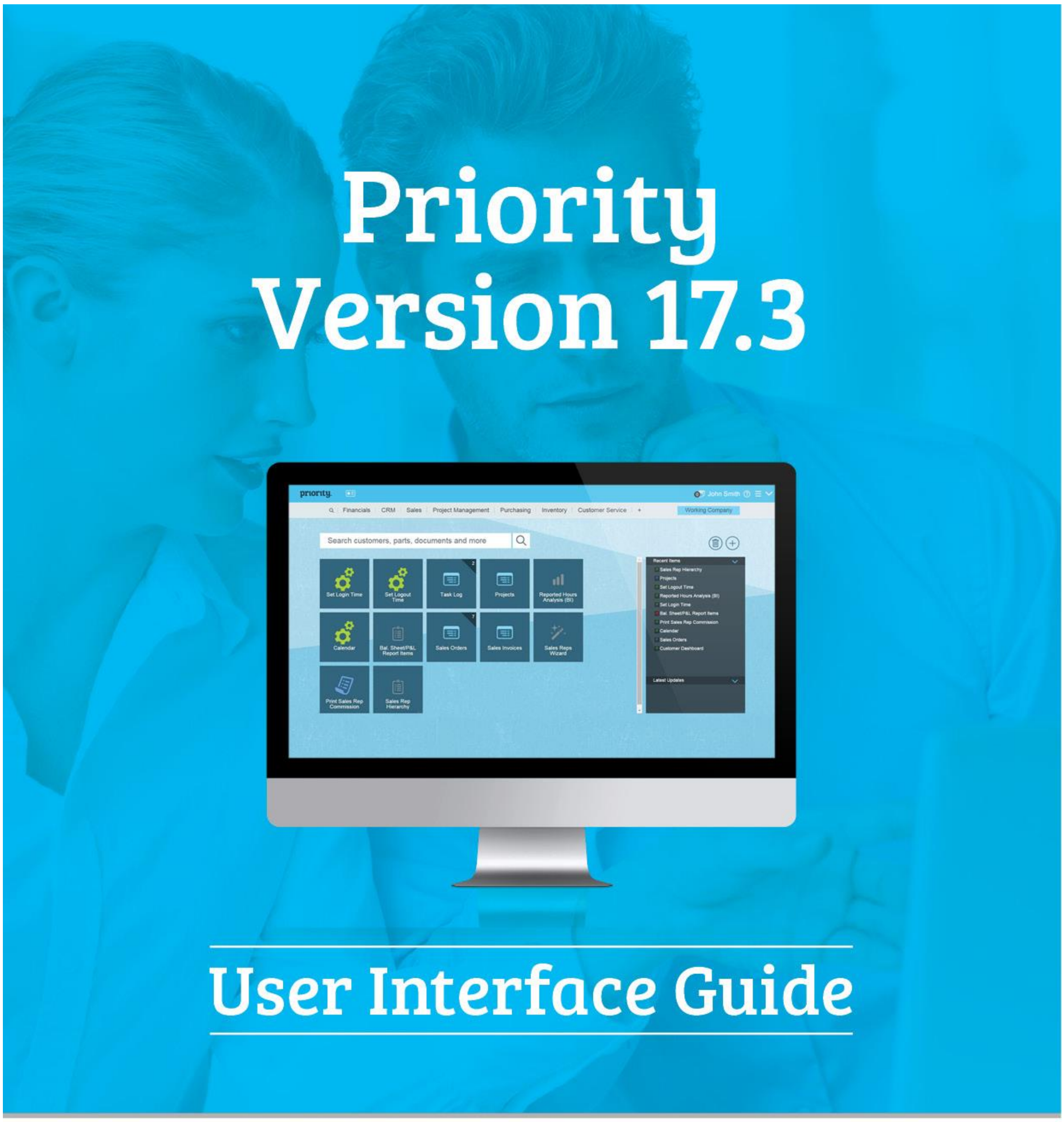


priority™

28 Mishol Hadkalim St.
Jerusalem, Israel
http://www.priority-software.com

Contents

Introduction

This manual is intended to present the users of ***Priority*** with the basic knowledge needed to begin working with the system. It explains commands and keystrokes; the structure of menus, forms, reports and programs; how to work with them; how to receive explanations and help from within the system; and the like. It does not, however, explain the functional use of the software. That is, it will answer such questions as “How do I run a report?” and “How do I retrieve data from a form?”, but not “Which form do I use to record a sales invoice?” or “How do I view warehouse balances?”

How to Enter and Exit the System

Entering the System

Opening *Priority*

1. Run ***Priority*** in your web browser.
2. Enter your username and password, and click **OK**.
   Note: The name of the user who last used this workstation appears automatically.
3. If your system maintains several different companies, select the company in which you want to work the first time you enter the application and click **OK**.
   Note: In all subsequent entries, the company last accessed by this workstation appears automatically.
4. When you first begin to work with the system, you will receive a password from your system manager, which you may be asked to change periodically. If, for some reason, you have forgotten your password, click the **Forgot password** message in the login screen to receive assistance in restoring your password via an e-mail link.

Changing Passwords

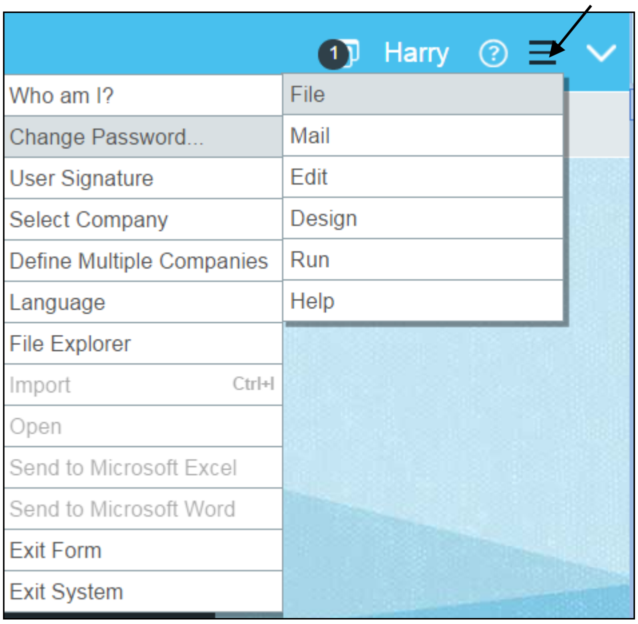


Figure 1: Changing passwords (the Options Menu)

1. Click the **Options Menu** button , click **File** and select **Change Password** (see **Figure 1**).

2. In the **New Password** column, record the new password you have chosen.

3. In the **Verify Password** column, record the new password again.

4. In the **Old Password** column, record your previous password.

5. Click **OK**.

Changing Company

1. Click the **Options Menu** button, click **File** and choose **Select Company**.

2. Select the company you wish to work in (see **Figure 2**) and click **OK**.

Note: If you have been assigned multiple privilege profiles in the selected company, each of which will affect your access to entities differently, also select the profile with which to work (see **Figure 3**).

Figure 2: Select Company pop-up window

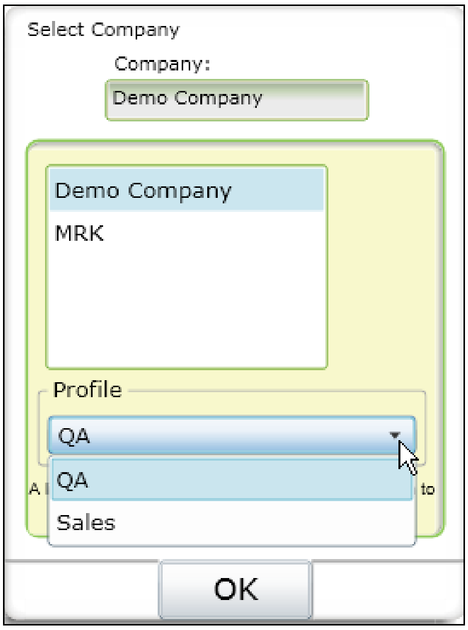


Figure 3: Select profile

Tip: You can switch companies at any time during your work session.

Customizing Companies

You can designate a different color for each company environment you work in, for easy reference. This will affect the background color of the company name. To do so, enter the ***Companies*** form and select a value in the **Color** column for each company.

You can also add user-specific text that will appear in the side menu when you are in a form. This text is defined in the **Title Bar Text** column of the **Company-Specific Information** form, a sub-level of the **Personnel File** form. Whatever text is recorded in this column will appear for the user and company in question.

Note: See **Accessing Entities** to learn about accessing system forms.

Automatically Accessing a Menu Item After Login

You can set up the system so that a given menu item opens automatically immediately upon entrance into the system.

Example:

> You usually work exclusively with the ***Sales Orders*** form. Set it to **Open After Login** and this form will open automatically right after you log in to ***Priority***.

1. Use the directional arrows to navigate the menus until the cursor rests on the entity in question.

2. Right-click the menu item and select **Open After Login**.

Exiting the System

1. At the conclusion of your work session, exit all forms, reports, parameter input screens and so on and close the browser.

Automatic Exit

The automatic exit feature is set by the system manager. After a specified interval of inactivity, you will get a warning that the program is about to end automatically. If there is no further response, all open entities will close down, except for any programs that are in progress. To continue working, simply cancel the warning. If you find that you receive warning messages more frequently than you would like, consult your system manager about adjusting the automatic exit time interval.

The Interface

The Home Page

The Home Page (see **Figure 4**) consists of the following:

- Main Menu
- Search Bar
- Selected Entities
- Trash Can
- Add Entity
- Recent Items List
- Latest Updates
- Search for Entity Tool
- Options Menu Button
- Active Screens Indicator
- ***Priority*** Home Page Button
- Favorites Menu
- Hide/Show Menu Arrow

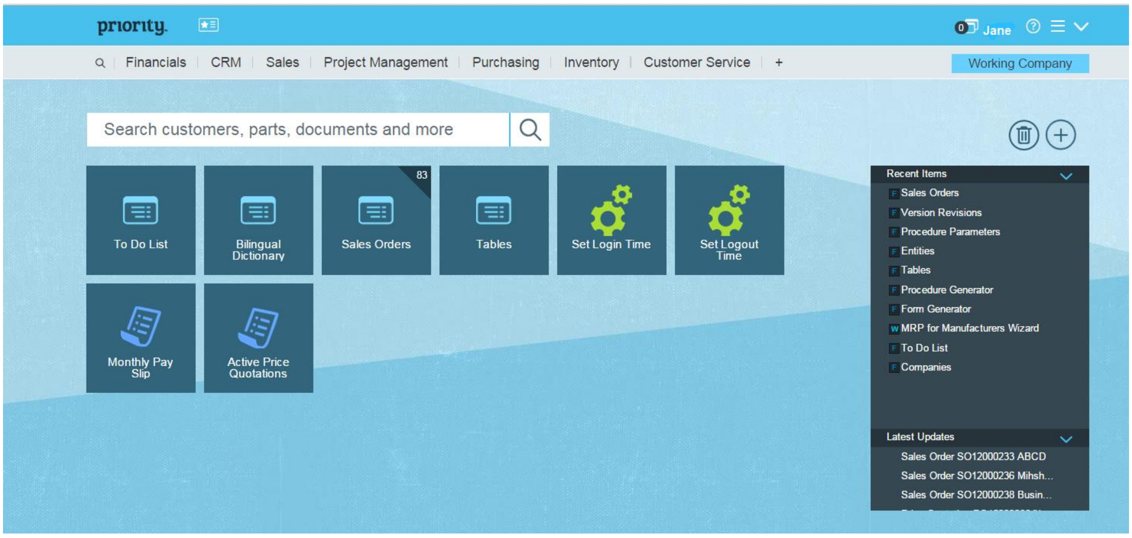


Figure 4: The Home Page

The Main Menu

The Main Menu appears on the top of the screen. Each menu item represents a **module**, a distinct set of sub-menus that comprise a specific topic, such as **Purchasing** or **Production**. Each ***Priority*** package contains a different combination of modules; thus, your system may not include all of the modules displayed above in **Figure 4**.

Each menu contains a variety of **entities** from which to choose. There are five types of entities available in the system, each represented by a unique icon:

M **Menu** – Opens a sub-menu, displaying all available items.

F **Form** – Loads a form in which to work (retrieve and update records).

R **Report** – Accesses saved reports or runs new ones.

P **Program –** Activates a program**.**

D **Printout** – Creates document printouts.

To navigate the Main Menu, click the desired menu. Then click the desired entity (or sub-menu). You can also use the keyboard: press **Enter** or the right arrow (→) to activate the current entity, the up and down arrows (↑ and ↓) to move within the menu, and the left arrow (←) to close it.

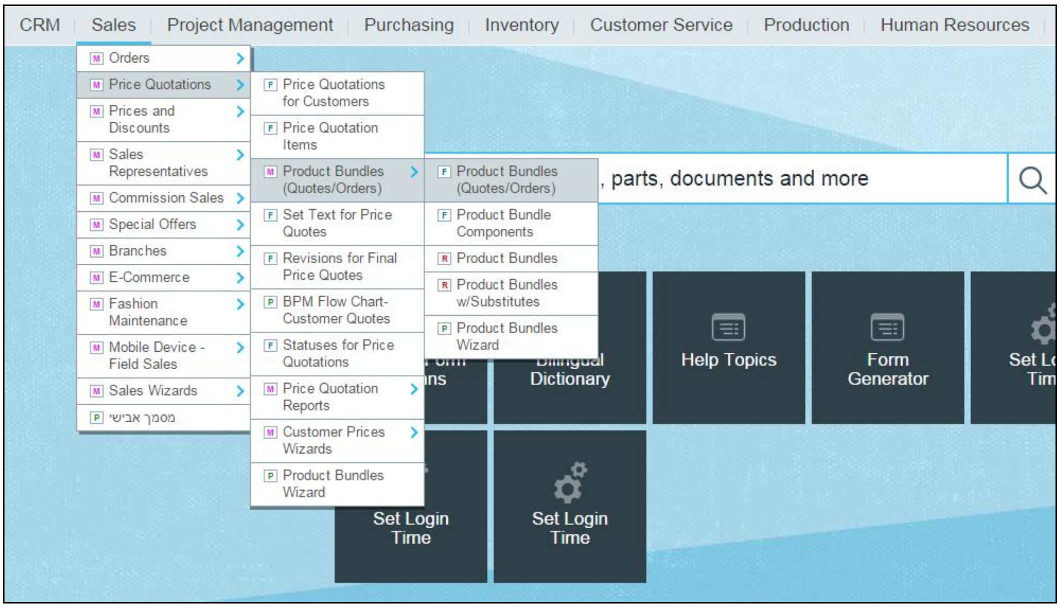


Figure 5: The Product Bundles (Quotes/Orders) menu

Example:

> You are presently in the ***Product Bundles (Quotes/Orders)*** menu (see **Figure 5**). You can see the path of menus used to arrive there:
>
> ***Price Quotations → Product Bundles (Quotes/Orders) → Product Bundles (Quotes/Orders)***
>
> From this menu it is possible, among other things, to:
>
> - Enter the ***Product Bundles (Quotes/Orders)*** form.
> - Print out the ***Product Bundles*** report.
> - Run the ***Product Bundles*** Wizard.

Note: On customizing the contents and order of each menu and sub-menu, see **Basic Customization** (p. 116).

You can copy from the Main Menu to a Windows clipboard the name of any given entity, the entity name with a link to it or the full path of an entity. This can then be pasted (e.g., in an MS-Word document) using **Ctrl+V**. To access these options, right-click the entity in question and select **Copy**, **Copy Shortcut** or **Copy Path**, respectively.

Search Bar

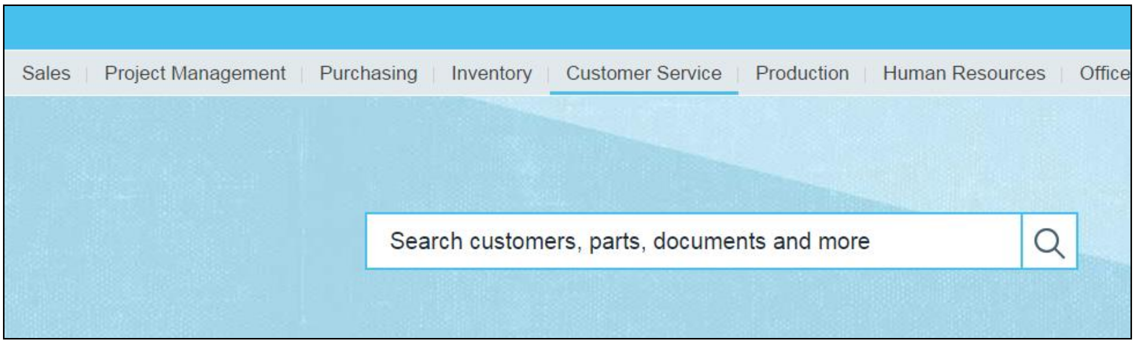


Figure 6: The Search Bar

The **Search Bar** (**Figure 6**) enables you to locate any document in the system by entering a search term (e.g., the name of a customer or an order number). The autocomplete feature allows quick access to a single document, or you can open a search results form, where a list of the retrieved documents can be viewed, conveniently sorted by document type and displaying the number of results per type.

The **Search Bar** can be accessed from the Home Page (located at the center of the screen) or from the top of any other screen.

Example:

You would like to find the sales order you worked on yesterday for a specific customer:

1. In the **Search Bar**, type in the customer's name or part of it (e.g., Jo).

2. While you type, you will receive the results of the autocomplete (see **Figure 7**). To view a document appearing in this list, click on the desired line or use the keyboard down arrow to navigate to it and press **Ctrl+Enter.**

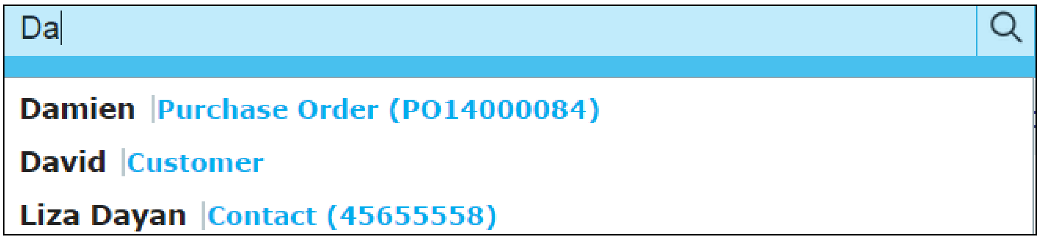


Figure 7: Search autocomplete

3. If the document does not appear, click on the **Search Bar** or press **Enter**. A form opens displaying all documents that contain that name (see **Figure 8**).If the list is long, it will be divided into tabs. The right pane displays the types and amount of documents retrieved.

4. To narrow down results to the sales orders recorded for the customer, click on "Sales Orders" in the right pane.

5. To narrow down results by date, select the relevant option under "Filter by Date".

6. Click the desired document; it will open in ***Priority***.

7. Click the **Search Results** program in the **Active Screens** window to return to the **Search Results** form.

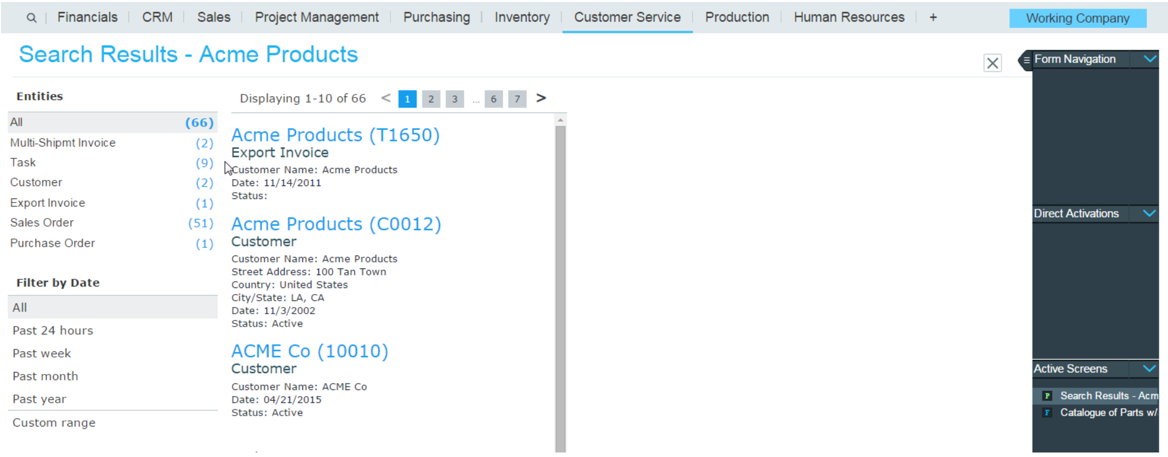


Figure 8: Search results

Using Special Search Characters

Like in other search engines, you can use special characters to get more specific search results.

- Use quotation marks to search for an exact phrase, for example: *"Warehouse Management System"*.
- Use "+" to indicate that the term *must* appear in the documents retrieved, for example:
  - *warehouse + system*
  - *system + "warehouse management"*
- Use "-" to exclude a term from the search. For example, to retrieve documents that include the word "system", but without the term "warehouse management", type: *system - "warehouse management".*
- Use "$" to retrieve the root word only without additional forms of the word. For example, to search for "warehouses" without returning documents with "warehouse", type: *$warehouses*.

Selected Entities

The easiest way to access the entities you use on a regular basis is to assign them to your **Selected Entities** display in the center of the Home Page. You can populate this display with links to the system entities that you use most frequently, such as the ***To Do List*** or the ***Sales Orders*** form.

To add a tile to your **Selected Entities**, do **one** of the following:

- Click the ⊕ icon on the Home Page to open the **Add to Home Page** window. Retrieve the desired entity via the Search window and click **Add**.

- Navigate to the desired entity on the Main Menu. Then, right-click the entity and select **Add to Home Page**.

You can organize the tiles of your **Selected Entities** by drag & drop, to determine the order in which they appear, or remove tiles from the display by dragging them to the trash can.

A triangle in the upper corner of a tile displays the number of documents of that type that are assigned to you. Click the triangle to access a display of these documents in your to-do list.

When hovering over a form tile with your mouse, a magnifying glass and a plus sign appear. Click the magnifying glass to open the form in Query mode to retrieve existing records (see p. 53) or click the plus sign to open a new record (if you have defined a query in the form, it will not be run).

Recent Items List

Entities that were used recently are added automatically to the **Recent Items** list on the Home Page.

Latest Updates List

Documents that were revised in the past 30 days will appear in the **Latest Updates** list. The list will include documents in which you changed the status or assigned user. The list displays the document type, number and additional details.

The **LATESTUPDATES** constant (in the **System Constants** form) limits the number of documents that will appear in the **Latest Updates** list. The **LOGUPDATE** constant (in the same form) determines whether documents in which you have revised remarks (in text forms), or to which you have attached files, are displayed.

The Search for Entity Tool

The Entity Search tool (**Figure 9**) enables you to locate any entity in the system by its title (or part of the title).

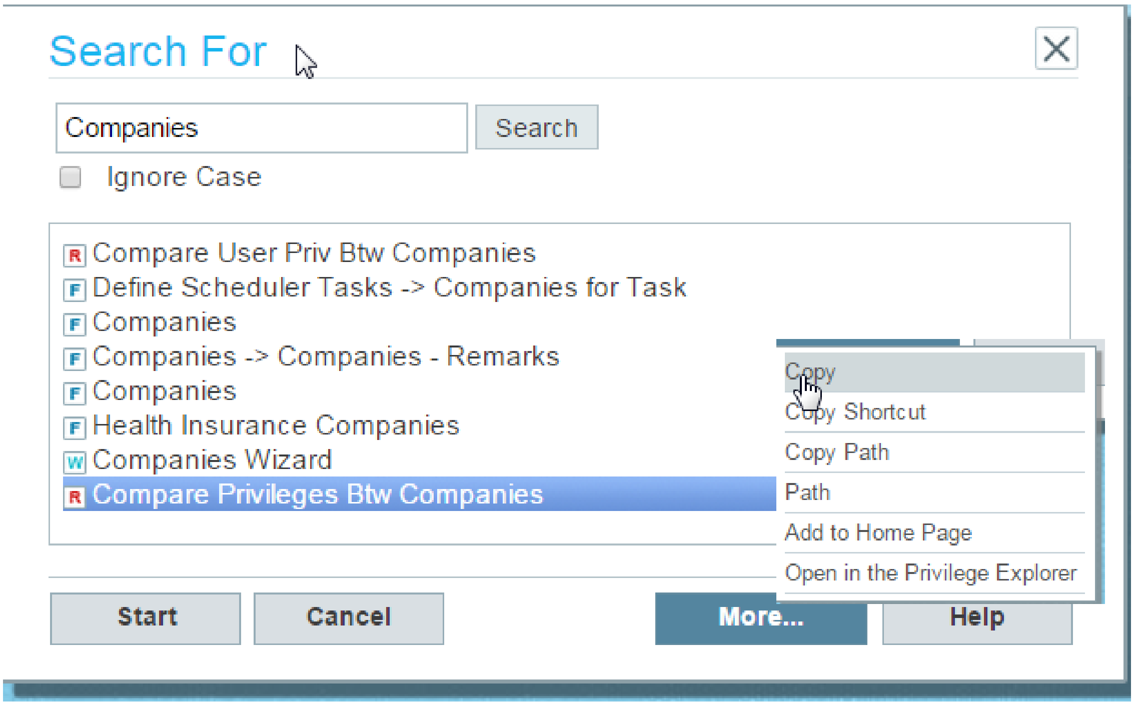


Figure 9: The Search for Entity tool

To activate the Entity Search tool, take **one** of the following steps:

- Click the **Entity Search** tool  , on the left side of the Main Menu bar.
- Click the **Options Menu** button, click **Run** and select **Search for Entity.**
- Press **Ctrl+]**.

To search for an entity:

1. In the **Search For** field, type in a term, or as much of the entity title as you know. The search will be case sensitive unless the **Ignore Case** box is checked.

2. Click the **Search For** button or press **Enter**. All entity titles that contain the term will then be displayed in the window.

3. Once you have located the entity you seek, you can:
   - Click the **Start** button to activate the entity directly.
   - Click the **More** button to access several options:
     - **Copy** (to copy the entity)
     - **Copy Shortcut** (to copy the entity together with a link to it)

- **Copy Path** (to copy the entity's menu path). The result is saved on a clipboard and can be pasted (e.g., in an MS-Word document) using **Ctrl+V**.
- View the entity's path
- Add the entity to the Home Page
- Open the **Privilege Explorer**, directly accessing privileges for the entity.

- Click the **Help** button to display the entity’s Help text. This is useful when you need to distinguish between several similar-sounding entities.

Options Menu Button

The **Options Menu** button, which appears at the top right of the screen, provides functions related to the appearance and navigation of the work area, the internal mail system and a variety of Help options.

Example:

> To change your password, click the **Options Menu** button, click **File** and select **Change Password.**

Note: When forms are open, additional functions are available.

For a full description of each item in the **Options Menu**, see **Appendix C**.

Active Screens Indicator

The **Active Screens** indicator, located at the top right of the screen, shows the number of entities that are currently open. To access any of the entities, click on the indicator. A window with the list of entities opens (**see Figure 10**).

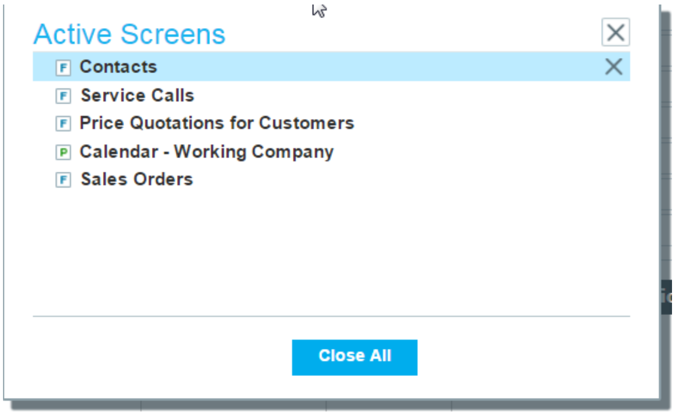


Figure 10: Active Screens

- To open a form (or run a report or program), do one of the following:
  - Click on the desired entity.
  - Use the keyboard up and down arrows to select it and press Enter.
- To close an entity, hover with your mouse over the entity (it will be highlighted in blue) and click the x that appears on the right.
- To close all entities at once, select **Close All**.
- To close the window, click the **x** on the top right corner.

Priority Home Page Button

The ***Priority*** Home Page button, located at the top left of the screen, enables you to return to the Home Page from any form.

Favorites Menu

The **Favorites Menu,** located at the top left of the screen, is a personalized list of entities for quick access to forms, programs or reports accessible from any screen. (For more information on how to add, remove and organize the **Favorites Menu,** see p.20).

Hide/Show Menu Arrow

The menu arrow is located at the top right corner of the screen. When the arrow is pointing upward, the Main Menu is displayed. To hide the Main Menu, click on the arrow; it will invert .

Accessing Entities

In summary, there are several ways to load a form, generate a report or run a program:

- Clicking the tile in the **Selected Entities** display (see p.10).
- Selecting it from your **Favorites Menu** (see p.14).
- Navigating the menus and clicking the desired entity (see p.7).
- Running the **Search for Entity** tool (see p.11).
- Selecting the entity from your list of **Recent Items** (see p.11).
- Selecting a document from your list of **Latest Updates** (see p.11)

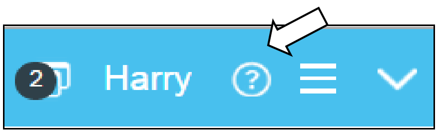
In addition, there are ways of accessing entities from within other entities, which will be discussed in the sections on forms and Help wizards.

Help

Several Help features are built into the system, providing you with explanations of everything from individual columns to entire work processes. Help regarding form columns and input parameters will be covered in the sections regarding **Forms** (see p. 78) and **Reports and Programs** (see p. 115), respectively.

The Help Button

A shortcut to **Help** options that help you get started, as well as **Online Support** and **FAQ**s , is available by clicking on the **Help** button in the upper right corner above the Main Menu.



Menu Entities

To receive an explanation of any entity in the Main Menu, right-click the desired entity and select **Help.** A message box will appear containing a brief description of the entity and its functions.

Note: This is the same description displayed by pressing **Ctrl+F1** in an open form.

Help messages may include hyperlinks (in blue) that open other entities. Once you leave such an entity, you return to the help message and the Main Menu.

Wizards

Wizards are interactive guides that help you carry out many of the system's processes. Each wizard appears in a help window that remains visible as you work on the main screen, and accompanies the process step by step. The user can even open the screens, reports and programs mentioned in the wizard from within the wizard itself. There are several ways to access wizards:

1. From the Main Menu: Menus and sub-menus contain direct links to wizards.

2. Click the **Options Menu** button, click **Help,** select **Help Wizards** and choose **one** of the following options:
   - In the **Contents** tab, navigate until you find the desired wizard. Double-click on the title to open the wizard.
   - The **General** sub-menu in the **Contents** tab contains a number of **Main Wizards**, whose purpose is to provide a general overview of the work processes that take place within an entire module. Each main wizard is hyperlinked to all of the wizards available in that module.
   - Click the **Search** tab, and use keywords to search for the various help topics that refer to the desired subject. Double-click on one of the displayed topics to open the relevant wizard to the selected topic. **Note:** If you forget where you are, use the **Home** button located at the bottom of each topic to return to the beginning of the wizard you are in.

Online Help

Priority's Online Help utility complements screen help by giving you access to a variety of aids and documentation that are maintained on the ***Priority*** web site. You can view up-to-date, topic-specific video clips, standard operating procedures (SOPs), frequently asked questions (FAQs) and documents. No downloads are necessary.

To access this utility:

1. Right-click the entity in question and select Online Help.

2. A new browser window opens. Click on the line(s) that interest you.

Forms

Introduction

Most of the work in the system is carried out by means of forms. You can use a form to add new data to the system, as well as to retrieve existing records for review and/or revision. Proficiency in the use of forms is an important first step in learning to use ***Priority***. From the application forms you can run programs, print reports, and send documents via fax or e-mail. Before giving you an in-depth explanation of how to work with forms, the following provides an overview of the basic concepts you need to know:

Each **record** in a given form is made up of several **columns**. Information specified for one column within a given record constitutes a **field**.

Most of the basic forms used for data entry initially appear in **Full-Record Display Mode**, in which only one record is presented at a time. This mode features a friendly graphic interface that divides the form's columns into tabs. In order to see multiple records at one time, you can toggle to **Multi-Record Display Mode**, which presents all of the form's records in a table. This mode is particularly useful for viewing retrieved data, and many forms open directly in this mode. However, if the form is wide, some of the columns will be hidden until you scroll to them. For more details, see p. 23.

In addition, forms have two primary modes of operation:

- **Data Entry mode**, in which you can record new data and update existing records, and
- **Query mode**, in which you retrieve data.

You can quickly move between these modes as you are working.

There are two non-exclusive types of forms: upper-level forms and sub-levels. An **upper-level form** is one that has at least one sub-level. **Sub-level forms** provide further information on a given record in the upper-level form. For instance, the ***Customers*** form, which stores customer names, mailing addresses and phone numbers, can have one sub-level that displays sites for each customer and another sub-level that displays all orders placed by the customer. **Root forms** are upper-level forms that are accessed directly from menus.

Form Display

When a form is opened, the following features appear at the top and sides:

- Main Menu (for details, see p.7)
- Shortcuts
- Form Navigation Window
- Direct Activations Menu
- Active Screens Window
- Favorites Menu
- Option Menu Button

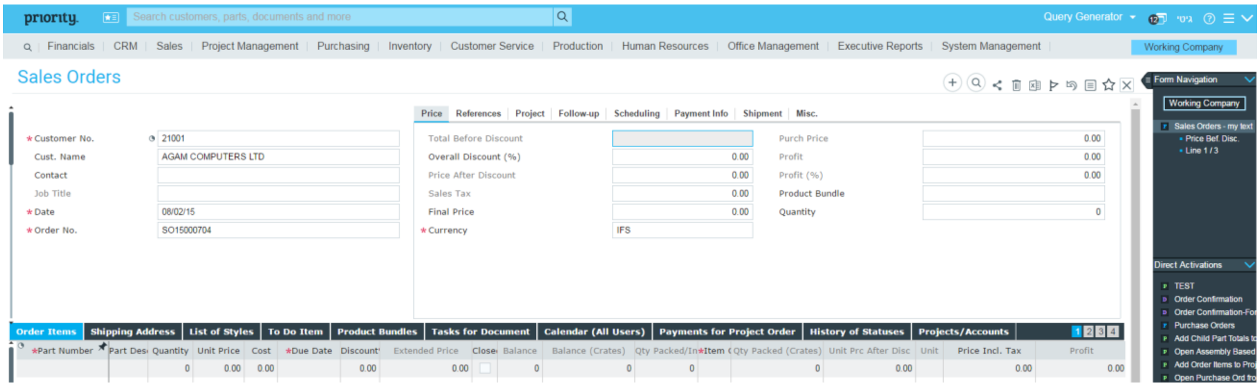


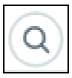
Figure 11: Form Display

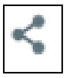
When a form opens, its title is displayed in the upper left-hand corner of the screen. The top section of the form is the active part, in which to record, update and/or view data. At the bottom of the active form appear several sub-level tabs; these open the sub-level forms of the active form, providing additional related data (for details, see p. 67).

Shortcuts

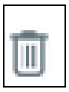
The row of icons located at the top of a form includes shortcuts to perform frequent actions:

 New Line (**Ctrl+Enter**) (see p. 31)

 Query/Clear Form (**F11**) (see p. 54)

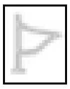


Share. Click this icon to access the following options: **Send Record Link** (see p. 183), **Dial** or **Skype** (see p. 176).



Delete record (**Ctrl+Delete**) (see p. 50)

Send to spreadsheet (see p.152)

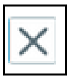


Track the document (see p. 48)

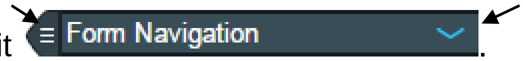
Undo the last action (**Ctrl+Z**) (see p. 49)

Toggle between Multi/Full-Record Display (**F4**) (see p. 23)

Add the form to **Favorites** (see p. 20)



Close the form (**Esc**).

As mentioned, the right pane includes the **Form Navigation** window, the **Direct Activations** menu and the **Active Screens** window. The entire pane can be hidden (and redisplayed) by clicking on the tab which always remains visible. You can hide each menu or window by clicking on the arrow at the top of it 

.

In addition, you can change the width of the right pane by situating the cursor at the edge (so that arrows appear) and dragging them left or right.

Form Navigation Window

At the top of the right pane is the **Form Navigation** window, which provides information on your current placement in the form. This window displays:

- the current company
- the form title
- the current form column
- the current line in the form.
  Note: You can also see the line you are in by placing the cursor anywhere along the vertical scroll bar situated to the left of the form.

If you move to a sub-level form or use the drill-down mechanism to access additional forms, the navigation path appears as well. To return to any form within that path, simply click on its title as displayed in this window.

Direct Activations Menu

At the center of the right pane is the **Direct Activations** menu. It contains a list of forms, programs and reports that are relevant to the current form. To access any of those entities, simply click on its title. For details on **Direct Activations**, see p. 72.

Active Screens Window

At the bottom of the right pane is the **Active Screens** window that lists the number of forms that are currently open. To access any of them, click on their title. Right-clicking on the form title provides additional options, such as closing or minimizing the form.

Notes:

- To move between active screens, press **Ctrl+↑** or **Ctrl+↓**.
- This function is also available using the **Active Screens** indicator on the top right corner of the screen.

Favorites Menu

The **Favorites Menu**, located at the top left of the screen, is accessible from all screens (see **Figure 12**). You can add, delete and organize entities on the **Favorites Menu** at your convenience.

To add any entity to your **Favorites,** navigate to the desired entity on the Main Menu. Then, right-click the entity and select **Add to Favorites**.

To add forms to your **Favorites** from within a given form:

- Click the ☆ icon at the top of the form; it will turn black ★.
- To remove the form from your **Favorites**, click the star again; it will become white ☆.

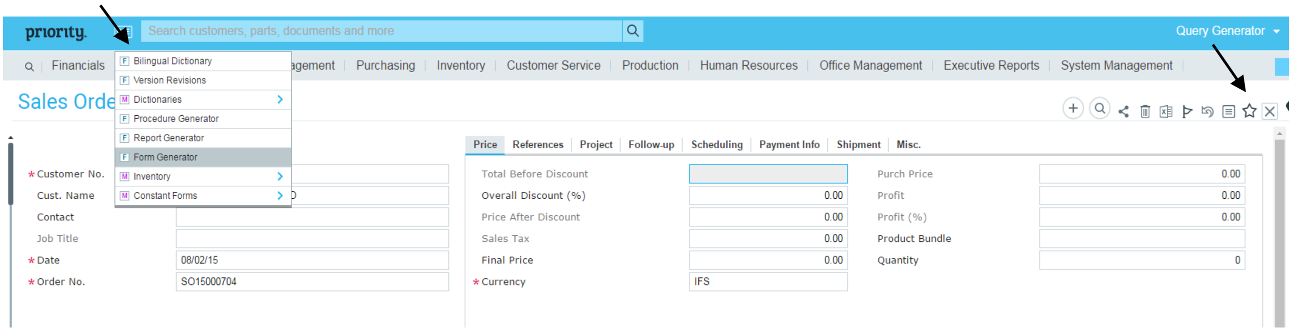


Figure 12: Favorites Menu

You can organize your **Favorites** to determine the order in which they appear. In addition, you can open sub-menus that will appear in the drop-down menu and include entities in them. You can also remove an entity from the **Favorites Menu**.

To organize your **Favorites**:

1. Do **one** of the following:

   - Click  at the top of the screen, right-click any entity and select **Organize Favorites**.
   - Click the **Options Menu** button, click **Design**, and select **Organize Favorites**.

2. In the window that opens, do any of the following:

   - Click the arrows to move items up or down within their existing menu.
   - Click the other buttons to add or delete a sub-menu or to remove an entity from your **Favorites.**
   - Right-click an entity/sub-menu to change its name, delete it or move it to a different sub-menu.

Options Menu Button

When a form is open, the **Options Menu** button offers functions unique to the operation of forms. For a full list of menu items, see **Appendix D**.

Working With Multi-Company Forms

If you are responsible for managing the data of multiple companies within your ***Priority*** system, you are likely to work with forms that display data from all or some of those companies simultaneously. Your system manager (or anyone with Manager privileges) has the option of converting almost any system form into a **multi-company form** (see p. 120).

When working with a multi-company form, you have the option of selecting the companies whose data you want to view. To do so:

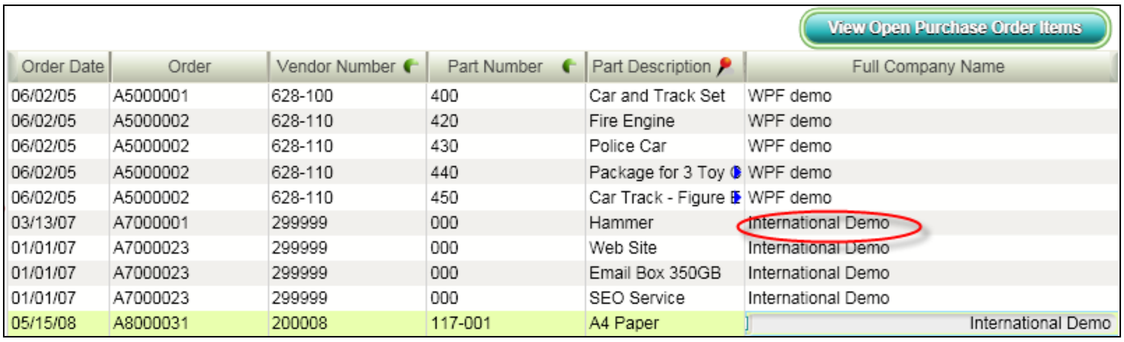
1. Click the **Options Menu**, click **File** and select **Define Multiple Companies**.

2. Flag each company for which you want to display data.

The selection that you make affects all multi-company forms in all companies within the system, though it does not affect the data that other users see. If you enter a different multi-company form and only want to see data for a single company, you will need to repeat the above operation and remove the unwanted check marks.

Note: The selection of companies also affects consolidated statements and other multi-company reports.

Each record in a multi-company form may originate from any of the selected companies. The company of each line item is designated in the **Full Company Name** column, which appears in all multi-company forms (see **Figure 13**).


View Open Purchase Order Items

Order Date	Order	Vendor Number	Part Number	Part Description	Full Company Name
06/02/05	A5000001	628-100	400	Car and Track Set	WPF demo
06/02/05	A5000002	628-110	420	Fire Engine	WPF demo
06/02/05	A5000002	628-110	430	Police Car	WPF demo
06/02/05	A5000002	628-110	440	Package for 3 Toy	WPF demo
06/02/05	A5000002	628-110	450	Car Track - Figure	WPF demo
03/13/07	A7000001	299999	000	Hammer	International Demo
01/01/07	A7000023	299999	000	Web Site	International Demo
01/01/07	A7000023	299999	000	Email Box 350GB	International Demo
01/01/07	A7000023	299999	000	SEO Service	International Demo
05/15/08	A8000031	200008	117-001	A4 Paper	International Demo

Figure 13: Viewing data in a multi-company form (Multi-Record Display Mode)

Note: 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 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.

Display Layouts

As mentioned above, forms have two main types of display layout:

1. **Full-Record Display**, in which one complete record is shown. This allows you to view all of the columns in one record. However, any additional records will be hidden from view until you move to a different line.

   Most of the basic forms used regularly for data entry (e.g., invoices, orders, price quotes, receipts, customers) open in Full-Record Display Mode (see **Figure 14**). This is a graphic interface that divides the form's columns into groups by subject, and presents each group in a tab. This display mode is fully customizable, allowing you to organize the columns in a manner that meets your needs and display them in custom tabs (see p. 118).

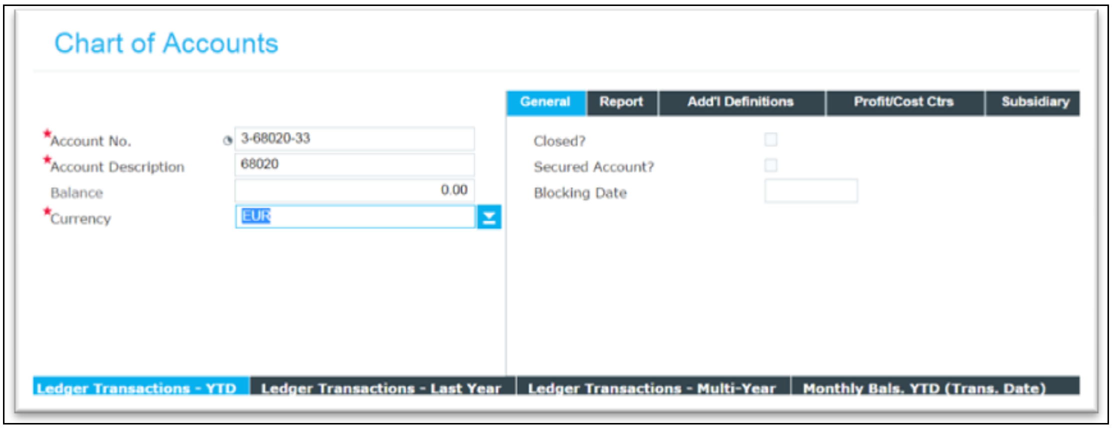


Figure 14: A single GL account (Full-Record Display Mode)

2. **Multi-Record Display**, in which several records are displayed simultaneously, broken down into frames (see **Figure 15**). If the form is wide, some columns may be temporarily hidden from view. In order to see them, you must scroll from one frame to the next.

Note: The maximum number of records that can be displayed on the screen at one time is set by a system constant.

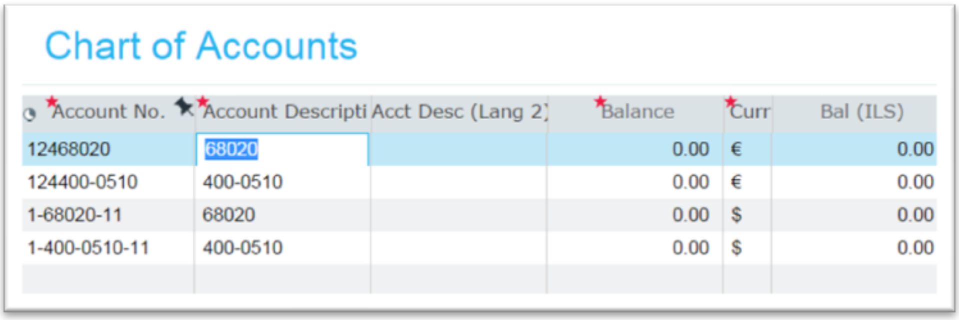


Chart of Accounts

Account No.	Account Descripti	Acct Desc (Lang 2)	Balance	Curr	Bal (ILS)
12468020	68020		0.00	€	0.00
124400-0510	400-0510		0.00	€	0.00
1-68020-11	68020		0.00	$	0.00
1-400-0510-11	400-0510		0.00	$	0.00

Figure 15: Viewing a number of accounts together (Multi-Record Display Mode)

In both display modes, in a form in which you can attach files (such as the ***Part Catalogue***), any record including an attachment will display an icon of the file type (or a thumbnail in the case of an image file). You can prevent icons and images from appearing (thus cutting down your work time) by selecting **No Image Display** in the **Design** menu of the **Options Menu**.

To toggle between the two display modes, take **one** of the following steps:

- Click  in the row of shortcuts.
- Press **F4**.
- Click the **Options Menu** button, click **Design** and select **Full/Multi-Record**.

The choice of display mode is a matter of personal preference. Multi-record display is recommended in a form with few columns, as it enables you to see several records at once, viewing all their fields. Full-record display is particularly useful during data entry, as it enables you to see and easily move between all fields in the current record. Indeed, most of the forms that open automatically in full-record display are used for this purpose.

Note: The display mode that is chosen has **no effect on the contents of the record**. The only difference is in the manner in which the data appears.

The following explanations of form usage often differentiate between the two types of display layouts. That is, the steps that you need to take are sometimes dictated by the display mode.

Personalizing the Appearance of Forms

There are several options for personalizing the appearance of forms.

Choose between a light or dark color theme by doing the following:

1. Click the **Options Menu** button, click **Design** and select **Color Theme**.

2. Select **Light** or **Dark**.

You can change the font size in forms, which affects Full-Record and Multi-Record Display modes alike:

1. Move the cursor to the desired column and do **one** of the following:
   - Right-click the column and select **Change Font Size**.
   - Click the **Options Menu** button, click **Design** and select **Change Font Size**.
2. Select the desired font size.

In addition, you can color-code form records, so that the system automatically changes the font color of a record when a given column receives a designated value or range of values.

Example 1:

1. Use the **Search for Entity** feature (see p. 11) to find and open the ***Customers*** form.
2. Click the **Options Menu** button, click **Run and** select **Retrieve All Records**.
3. Click the **Details** tab and move to a record with a sales rep.
4. Right-click the **Sales Rep Number** column. Select **Record Color** → **Define Record Color**, select a color and click **OK**. Each customer with the same sales rep will appear in the chosen color.

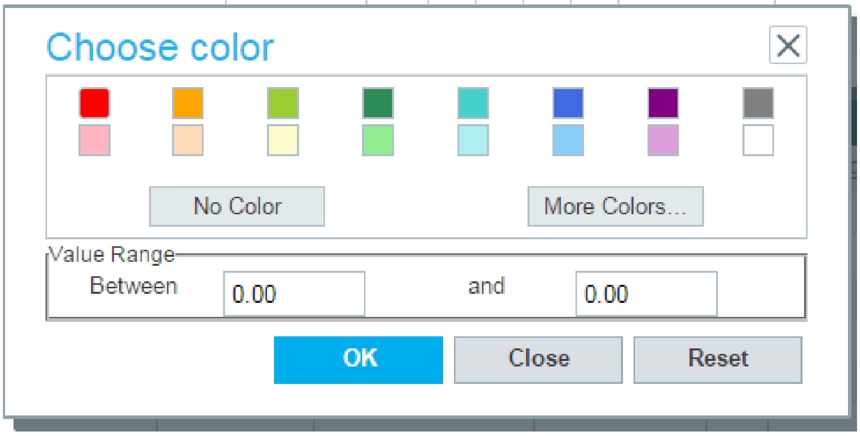


Figure 16: The Choose color dialogue box

5. Click **F4** and scroll through the records to see which customers use the sales rep in question.

Example 2:

To assign a record color for a range of values (when the column in question contains a numerical value):

1. From the ***Customers*** form, click the **Company Data** tab.

2. Right-click the **# of Employees** column and **Select Record Color** → **Define Record Color**. Select a color, indicate the range of values (e.g., 0-50) to which you want to assign that record color and then click **OK**.

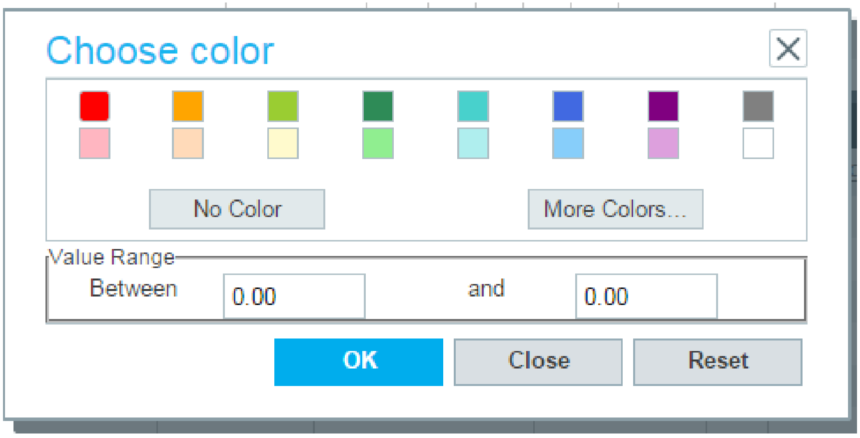


Figure 17: Setting a range of values in the Choose color dialogue box

3. Click **F4** and scroll through the records to see which customers employ the designated number of people (in this example, anywhere between 0 and 50 employees).

Notes:

- You may define more than one color condition for a single column.
- The **Define Record Color** command is also accessed from the **Design** menu in the **Options Menu** (use the **Record Color** line).

To remove color conditions from a column:

1. Move to a record in the form and fill in the value to which the color code is attached (e.g., in the first example, specify the sales rep in question in the **Sales Rep Number** column).

2. Move the cursor to the desired column and do **one** of the following:

   - Right-click the column and select **Record Color** → **Define Record Color**.

- Click the **Options Menu** button, click **Design** and select **Record Color** and then **Define Record Color**.

3. Click the **No Color** option followed by **OK**.
   Tip: Repeat the process if more than one condition has been defined.

To remove all color conditions from a form:

1. Move to a record in the form.

2. Move the cursor to the desired column and do **one** of the following:
   - Right-click the column and select **Record Color** → **Define Record Color**.
   - Click the **Options Menu button**, click **Design, Record Color** and then **Define Record Color.**

3. Click the **Reset** button at the bottom right of the screen.

To check the form's current color conditions (see **Figure 18**), do **one** of the following:

- Right-click any column and select **Record Color** → **Show Current Record Colors**.
- Click the **Options Menu** button, click **Design**, **Record Color** and then **Show Current Record Colors**.

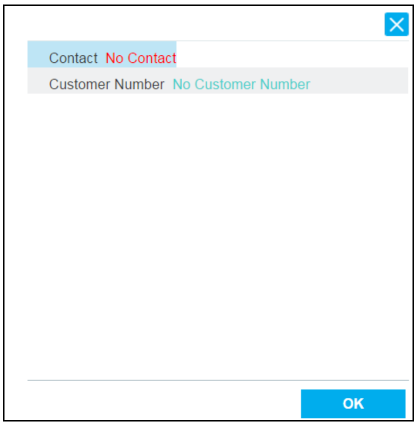


Figure 18: The Current conditions dialogue box

Navigating Forms

Moving Within a Form in Full-Record Display Mode

To move within the current record, simply click on the desired field with the mouse. Alternatively, you can use the arrow keys or press **Enter**, **Tab** or **Shift+Tab** (to go backwards).

To move between tabs, press **Shift →** and **Shift ←**, or press **Tab** to move from the last column in one tab to the first column in the next.

Note: To move between the main section and the first tab, it is sufficient to use the → key.

To move between records, use the **PgUp** and **PgDn** keys, the vertical scroll bar at the left of the form or the scroll button on your mouse.

Moving Within a Form in Multi-Record Display Mode

To move between rows, you can:

- Click on the desired row with the mouse.
- Use the vertical scroll bar to the left of the form.
  Note: The current form line is displayed whenever the cursor is placed over this scroll bar.
- Use the up/down arrow keys ↑↓.
- Press **Enter** to move to the next field.
- Use the scroll button on your mouse.

Note: As you move from one row to another, the current row becomes **passive**. That is, the column you are in changes color.

To move between columns within a row, you can:

- Click on the desired field with the mouse.
- Use the left and right arrow keys ←→.
- Press **Tab** or **Enter** to move one column to the right, **Shift+Tab** to move to the left.
- Use the horizontal scroll bar (that begins after the tacked column – see below).

In a form with many columns, not all can be viewed at once. The tack  that is attached to one of the first form columns determines the part of the form you continue to see as you keep scrolling to the right. You can drag that tack to any column in the form and that column – together with all columns to the left of the tack – will remain visible when you navigate to the hidden columns to the right.

Data Entry

When you first enter a form, you are in Data Entry mode, in which you can record and update data (as opposed to Query mode, in which you retrieve records; see p. 53). The very first field (first column, first line) is highlighted. In most cases, no data is visible in the form columns.

Read-Only and Updateable Columns

Any column in a form is either **read-only** or **updateable**. Some updateable columns are **mandatory**.

Note: A mandatory column must always be filled in. If it is not, you will not be able to update the record or continue work in the form. If you get stuck in a record (because you don’t have all the needed mandatory information), you have to undo your actions or clear the line (see p. 49).

Priority features several visual cues to help you differentiate between types of columns. Mandatory columns are marked with a red star. Read-only columns are gray.

Shortcut Values

The plus and minus keys (+/–) provide helpful shortcuts when recording dates, times and numerical values.

Note: The **Default Value** command serves the same function as the minus key (-). This option may be selected either from the **Edit** menu (in the **Options Menu**) or from the pop-up menu accessed from the right mouse button.

Dates and Times

A date field is distinguished by a small calendar  on the right (which itself can be used to select a date; see p. 41).

- Press + or – to enter today's date automatically.
- Use the same keys to modify an existing date; press “+” to display the next date or press “-“to show the previous one. Press again to continue moving forward or backward.
- These keys have the same effect for columns that display date + time, only time or the day of the week.

In addition to the above are fields that show a span of time, consisting of a three-digit number representing hours, separated by a colon from a two-digit number representing minutes. 0’s must be added to the left of any numbers that have less than the required amount of digits; for example, 050:20 signifies 50 hours and 20 minutes, 000:30 indicates 30 minutes. The displayed time span can be modified incrementally by minutes via the plus and minus keys.

Numerical Values

To increase or decrease a numerical value (for example, a price), press the plus or minus key respectively.

Note: A variety of display formats are available (e.g., 1,234.56 for English-speaking users, 1.234,56 for Italian users). To change the format, use the ***Languages*** form.

Adding Records to an Empty Form

To add a new record in a form in which no data is displayed, simply type in the information you wish to specify (or copy it from elsewhere; see below). If you have typed incorrectly, you can backspace and correct the error. Make sure that all mandatory columns are filled in.

You can edit what you have typed by using **one** of the following methods:

- Highlight and overwrite:
  1. Drag along the written text with the left mouse button to highlight any portion that was incorrectly typed.
  2. Type in the correct characters. Anything highlighted will be overwritten.
- Type in **Replace** mode:
  1. Switch from **Scroll** mode to **Edit** mode (press **F2**).
  2. Use the left and right arrow keys ←→ to move the cursor within the field.
  3. Switch from **Insert** mode to **Replace** mode (press **Ins** on the keypad) to overwrite any incorrect character.

As soon as you add a new record and leave the line, the database is updated automatically. This occurs when:

- You move the cursor to any other line in the form.
- You move to Query mode.

- You exit the form.
- You enter a sub-level form.

Example:

> Use the **Search for Entity** feature (see p. 11) to find and open the ***Customers*** form. You will notice that several columns are mandatory such as the **Customer Number** and **Name**. Moreover, a temporary number is assigned automatically once a name is designated. So to add a new customer, all you need to do is move to the **Name** column and designate a customer name (e.g., “Just Testing”).
>
> If you wish, you can add other information (like phone number or street address), but it is not necessary at this stage.
>
> Press **PgDn** to leave the line and update the database. The “Just Testing” customer has now been added to the database, and you are positioned to add another new customer.
>
> Note that the customer you have added still appears in the form; you just can’t see it, because you are in Full-Record Display Mode and you have moved to a new record. Press **F4** to move to Multi-Record Display Mode. You will see the “Just Testing” customer on the first line of the form and your cursor in the second (blank) line.
>
> Now leave and reenter the form; it will be empty of records. To find “Just Testing” again, click the **Options Menu** button, click **Run** and select **Retrieve All Records**. All customers, including Just Testing, will be displayed. Move to Multi-Record Display Mode (press **F4**) to view them all at once.

Adding Records to a Filled-in Form

In order to add new records once existing records appear in the form, you need to **open a new line**. To do so, select **one** of the following methods:

- Click  in the row of shortcuts.
- Press **Ctrl+Enter**.
- Click the **Options Menu** button, click **Edit** and select **New Line**.
- Move to the last line in the form and move down to a blank line.

The following sections provide additional tips for data entry in forms.

Setting Column Width

Some form columns do not open to their full width, both in Full-Record Display Mode and Multi-Record Display Mode. When you place the cursor on such a column and begin to type, it automatically opens up to its full width. To expand the column to its maximum size without editing the field, press the **Shift** key. It will return to its original size when you move to a different field.

If you are working in Multi-Record Display Mode, you can expand the column to its full width and leave it open until the root form (the form reached from the Main Menu) is exited. To do so, do **one** of the following:

- Click the **Options Menu** button, click **Edit** and select **Expand**.
- Right-click the column and select **Expand**.

To permanently adjust the width of a form column, you can grab the dividing line between column titles and move it to the left or right. The resulting columns will retain their new width even after you close the form. To restore all columns in the form to their default widths, select the **Restore Column Widths** command from the **Design** menu in the **Options Menu**.

Simple Copy and Paste Features

Anyone familiar with Microsoft Windows should be adept at using its copy and paste features, which are also available for any field in ***Priority***.

To copy highlighted text, do **one** of the following:

- Press **Ctrl+C**.
- Click the **Options Menu** button, click **Edit** and select **Copy**.
- Right-click the column in question and select **Copy**.

To paste text that has been copied, move the cursor to the proper line and column and do **one** of the following:

- Press **Ctrl+V**.
- Click the **Options Menu** button, click **Edit** and select **Paste**.
- Right-click the column in question and select **Paste**.

Notes:

- When pasting large amounts of data into ***Priority*** (e.g., from Excel), you can stop the action by pressing **Ctrl+Break**.

* When pasting data into ***Priority***, you can also choose the **Paste Special - Ignore Warnings** command (from the **Edit** or right mouse button menus) to paste text from the clipboard without displaying system warnings. This is especially useful when pasting large amounts of data into ***Priority*** (e.g., from Excel). However, this operation can result in the corruption of one or more records in the database if the data being pasted contains errors, and should therefore be used with caution.

Choosing a Value From a Choose List

In many form columns, you can choose the value that you wish to enter from a short list. These columns are identified by a Choose button  that appears to the right of the text box once the cursor is situated in that field. Such a button, in fact, appears next to the **Sales Rep Number** column in the ***Customers*** form. To choose from a list of possible sales reps, move to the **Details** tab and click this button or press **F6** from the column in question. If the column is currently empty, you can also open the Choose list by pressing the **Space** bar. After opening the Choose list, the icon changes to .

To choose the desired value, simply locate and click on that value. All Choose lists also feature the following two mechanisms, which are designed to speed up the selection process:

* Sorting mechanism: You can sort a Choose list in ascending or descending order by clicking on the list title (see **Figure 19**).
* Choose pattern field: You can use the choose pattern field appearing at the top of the Choose list (see **Figure 19**) to help you locate a particular value. Initially, this field is filled in with the first value appearing in the Choose list, and that value is highlighted. If you begin recording the first few letters of the desired value in this field, the system automatically jumps to the first line matching the recorded string. Once the cursor is on the correct line, press **Enter** to choose that value. The remaining text is filled in automatically.

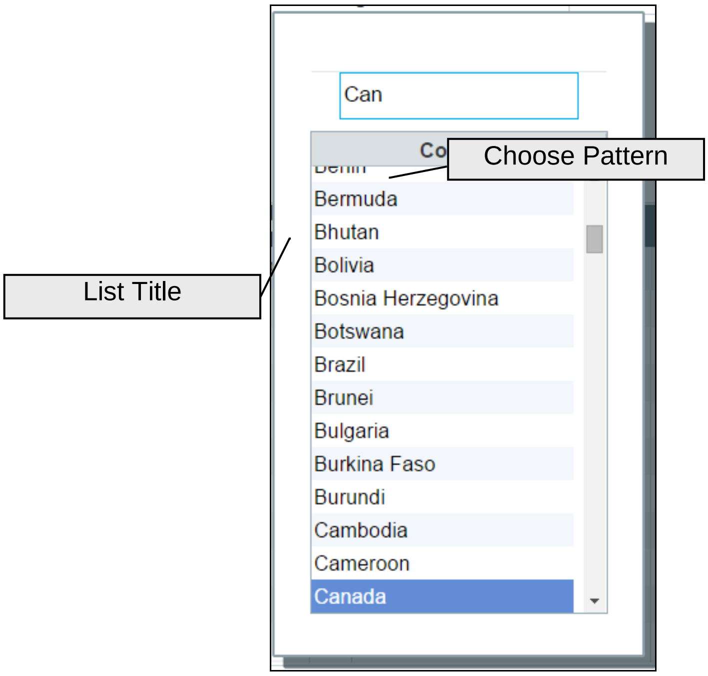


Figure 19: Choosing a value from a Choose list

The values in each Choose list are taken from a source form that was filled in at a previous stage. For example, the Choose list you used in the ***Customers*** form was taken from the values in the ***Sales Representatives*** form. Consequently, in order to update the Choose list, you must modify the ***Sales Representatives*** form.

After selecting a value, the Choose list 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 help you keep track of your location and serve as links back to previous forms. Click one of the links or press **Esc** to return to the original form.

Extended Choose lists (see **Figure 20**) include a second list title. You can sort an extended Choose list in ascending or descending order by clicking on either of the list titles. The first column in the list is named after the form column you are in (e.g., **Name**, **User**, **Family**) and the second is called **Description**.

Some extended Choose lists also allow you to select more than one item simultaneously. Multiple list items are selected in the same manner as in standard Windows tools:

To select **adjacent** items:

- Click on the first item, hold down the **Shift** key and click on the last item. The entire block of items from the first to the last will be highlighted for selection. Click **OK**.

To select several **discrete** items:

- Click on the first item, hold down the **Ctrl** key and click on each item you want to select. Each item will remain highlighted for selection. Click **OK**.

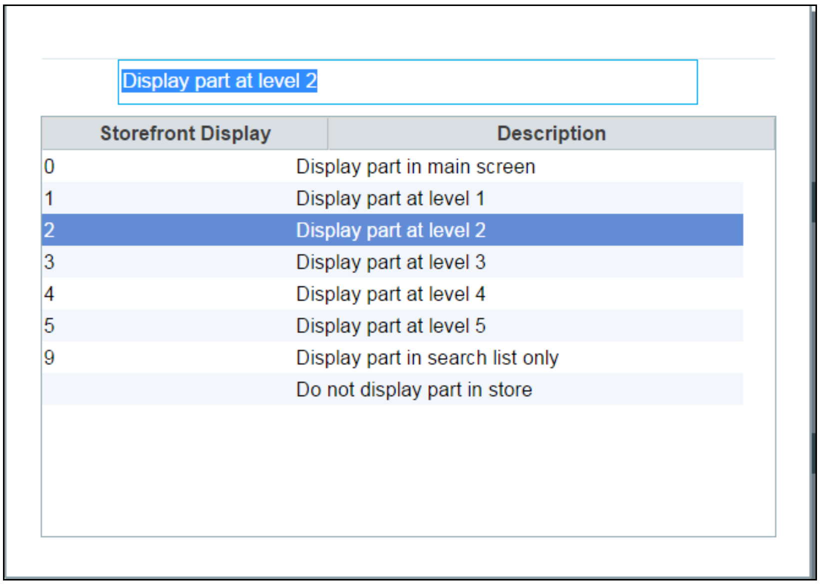


Figure 20: Example of an extended Choose list

If the source form happens to be **empty of values**, you will automatically find yourself in the source form, where you can add any records you need. You can also reach this form when you want to add to or revise the values in an existing Choose list.

To open the source form, do **one** of the following:

- Press **F6** from within the list.
- Click the magnifying glass (that appears when the Choose list is opened) next to the column.
- Press **F6** twice from within the column.

Add the desired record, then copy the newly added value back into the original form via the Choose Value utility, which is explained below on p. 39. Once there is even one record in the source form, a Choose list will appear.

Choosing a Value From a Search List

In some forms a drop-down arrow  opens a Search list rather than a Choose list.

To open the Search window, do **one** of the following:

- Click on the drop-down button to the right of the column.

- Move to the column in question and press **F6**.
- In an empty column, press the **Space** bar.

The window is divided into four sections (see **Figure 21**).

- The advanced options section that includes:
  - **Create a Record** – To create a new record in the source form.
  - **Advanced Search** – To retrieve a record in the source form (for more information on data retrieval and queries, see p. 53).
  - **Choose Value** – To copy a newly added or retrieved value back into the original form (see p. 39).
- The search pattern field, in which the cursor is located.
- The criterion tab (**By Name**, **By Number**, **By Other Criterion**), determining the type of search.
- The list of retrieved values.

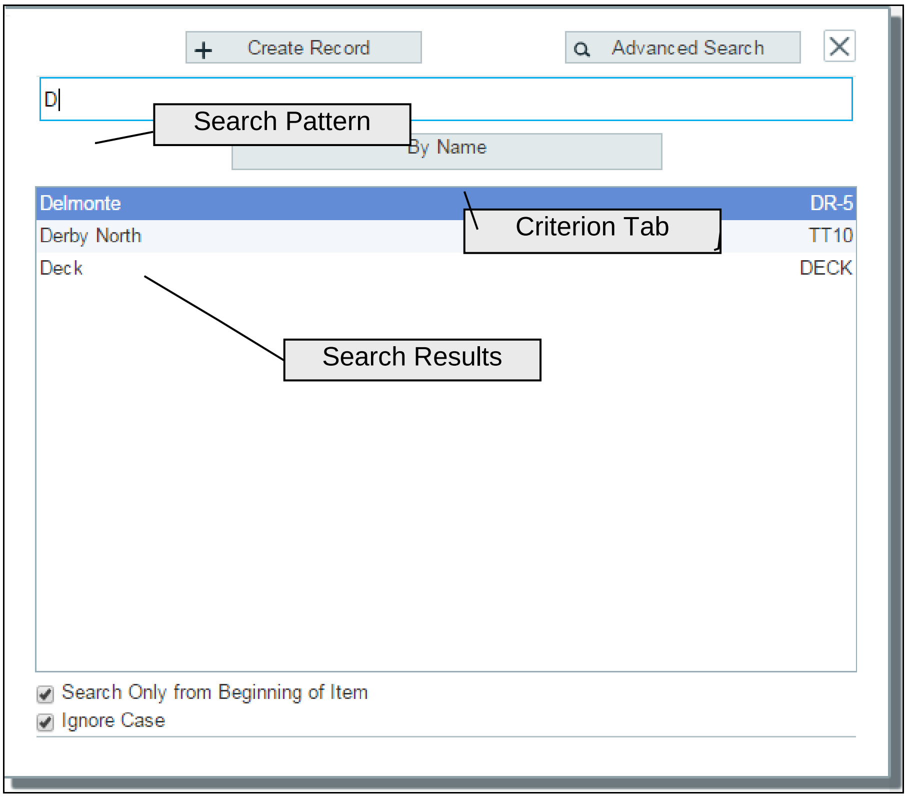


Figure 21: Searching for a warehouse starting with “D”

Initially, the search pattern field is empty. Depending on the value of the **EMPTYSEARCH** system constant, either all values are retrieved or the list is blank. Either way, you conduct the search by specifying search criteria.

When the **Search Only from Beginning of Item** option at the bottom of the Search list window is flagged, Search lists look for your search pattern at the beginning of each list item, returning all values that begin with that pattern. If the checkmark is removed from this option, the Search list will look for your search pattern anywhere within the items.

Note: The **SEARCHOPTION** system constant determines whether the option is flagged when you first open a Search list.

You can also flag the **Ignore case** option at the bottom of the Search list window so that the search is not case-sensitive.

Follow the example below and practice using the utility to learn how to efficiently select values.

Example:

Search for The Learning Center customer as follows:

1. Click the **Options Menu** button, click **File** and choose **Select Company** to make sure that you are in the demo company.

2. Use the **Search for Entity** feature (see p. 11) to find and open the ***Customers*** form.

3. In the **Number** column, click on the button to display the Search window.

4. Verify that the criterion tab is entitled “By Name“ (if the tab is labeled “By Number” or “By Other Criterion”, keep clicking on it with the left mouse button until it switches to “By Name”).

5. In the search pattern field (where the cursor is located), type in the initial letter (e.g., “T”), partial word (“Th”) or complete word (“The”) of the customer you are searching for. This immediately triggers a mechanism that scans the list of customer names — you will see rapid movement in the window — and stops once all the customers whose name begins with the value you specified are displayed in the left-hand column.

6. Select the customer whose record you wish to view by using the up and down arrows ↑↓ or clicking on the customer’s name with the left mouse button (when the list is long, use the scroll bar to move up and down through the list of values). The selected customer’s number will automatically be inserted into the **Number** column and the Search window will close.

Searches using the **Search Only from Beginning of Item** option are conducted by consecutive initial characters. Thus, specifying “Com” will only retrieve names that **begin** with “Com” (e.g., “Computer Heaven”). Searches that do not use this option will also retrieve names that **contain** "Com", such as “NewsCom Services”. Searches that use the **Ignore case** option will also retrieve names that contain "COM" or "com" (e.g., Telecom Ltd.).

Searching by number is very similar to the procedure described above. Click on the criterion tab to select “By Number” and proceed to search for a customer by number.

Use the “By Other Criterion” tab under special circumstances when an additional search is possible. For instance, the **E-mail Address** column in the ***Compose Mail*** form allows for a search by sender name (“By Name”) and by e-mail address (“By Other Criterion”).

Some Search lists also allow you to select more than one list item simultaneously (see **Figure 22**), in the same manner as in standard Windows tools:

To select **adjacent** items:

- Click on the first item, hold down the **Shift** key and click on the last item. The entire block of items from the first to the last will be highlighted for selection. Press **Enter**.

To select several **discrete** items:

- Click on the first item, hold down the **Ctrl** key and click on each item you want to select. Each item will remain highlighted for selection. Press **Enter**.

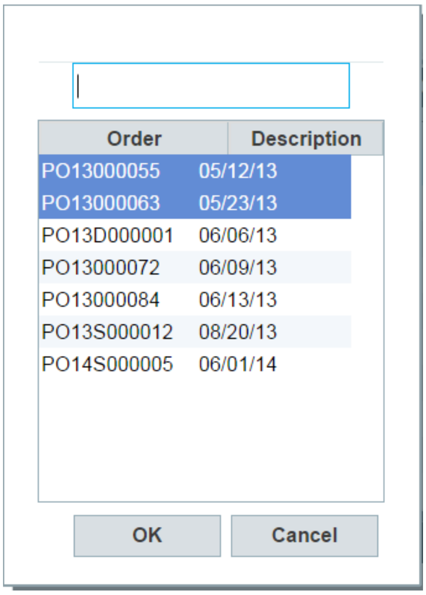


Figure 22: Selecting multiple Search list items

Choose Value

When you open a Choose or Search list that is empty, you automatically access the source form, in which the list values are actually defined and maintained. When you first begin working with the system and have not recorded much data, you will find the or button frequently activates a form. Once there is even one record in the source form, a Search or Choose list will appear.

You can also reach the source form manually, in order to add listed values, by doing one of the following:

- When in a Choose/Search list, press **F6** or the magnifying glass next to the column.
- When in a Search list, press **Create Record**.

After recording the data in the source form, copy the relevant value back into the form column you were originally working on by clicking **Choose Value** (see **Figure 23**), by pressing **F8** or by clicking the name of the original form displayed in the breadcrumbs at the top of the form.

Note: Ensure that the cursor is on the correct line before activating this feature.

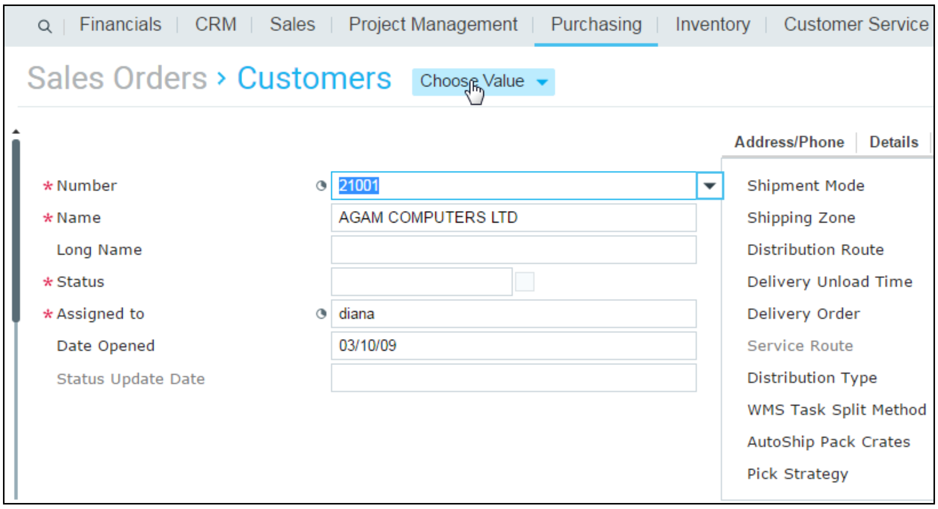


Figure 23: Choosing a value in a source form

If you wish to leave the source form without copying any value, click the arrow next to **Choose Value** and select **Back**, or press **Esc**.

Example:

> You want to assign a shipping zone to the "Just Testing" customer and that zone has not yet been defined in your company.
>
> 1. In the ***Customers*** form, retrieve all customers (click **Retrieve All Records** from the **Run** menu on the **Options Menu**) and scroll down (e.g., use the vertical scrollbar) until you reach the line for the "Just Testing" customer.
>
> 2. In the **Shipments** tab, move to the **Shipping Zone** column. This actually comprises two separate columns. Make sure the cursor is on the leftmost one.
>
> 3. Click on the button. As the zone you want to assign does not appear on the list, you need to access the source form. Press **F6**. The ***Shipping Zones*** form will open automatically.
>
> 4. Open a new line and add the zone you want to assign to the customer in question (for example, **Zone Code** = N; **Zone Description** = North).
>
> 5. Without leaving the line, click the **Choose Value** button next to the form name or press **F8**. The ***Shipping Zones*** form will close and the zone in question will be inserted in the ***Customers*** form. From now on, that zone will appear in the Choose list.

The example above shows how to include a known value in a Choose list by adding it to the source form. Additionally, when in a Search list, you can use the **Advanced Search** button to help you find the value you need. By pressing the button, you access the source form in Query mode. You can then retrieve a record that includes the data you are missing by inputting data that you know, as demonstrated in the example below.

Example:

> You are recording a price quote for a customer and you are not sure of the customer's name, but you recall that their office is located in Chicago.
>
> 1. In the **Price Quotations for Customers** form, click the arrow next to the **Customer No.** column.
>
> 2. In the Search list that opens, click **Advanced Search**. The **Customers** form opens in Query mode.

3. Move to the **City** column (in the **Address/Phone** tab), record "Chicago" and press **Enter**. All customers whose addresses are located in the city of Chicago will be retrieved.

4. Scroll down (e.g., use the vertical scrollbar) until you find the line with the customer you are looking for.

5. Without leaving the line, click **Choose Value** or press **F8**. The **Customers** form will close and the number of the customer in question will be inserted in the **Price Quotations** form.

Choosing a Date From a Calendar

One of the options you can use to specify a date is to choose it from a pop-up calendar (see **Figure 24** and **Figure 25**). This option is particularly useful when you wish to record a date in the future and need to know the day of the week on which it falls.

There are two pop-up calendars, one of which features both the date and the time.

Note: In different Windows versions, the calendar looks and functions slightly differently.

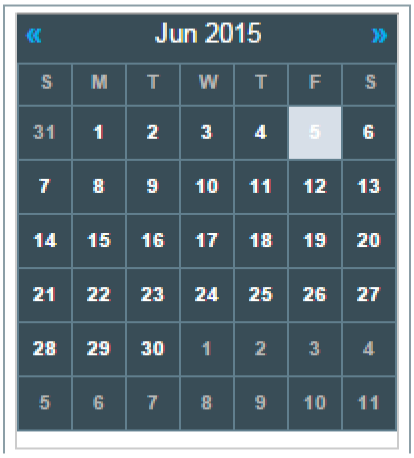


Figure 24: Pop-up calendar

Figure 25: Pop-up calendar with time

To use the pop-up calendar:

1. From an updateable Date-type column, do **one** of the following:

   - Click on the  button.
   - Press **F6**.
   - If the column is currently empty, press the **Space** bar.

2. The calendar displays the current date by default.

3. To change the month, do **one** of the following:
   - Click the arrows » « to move between months.
   - Press **PgUp** and **PgDn** to move between months.

4. To change the date, do one of the following:
   - Click the desired date (this confirms the date and closes the calendar).
   - Press the left/right arrows (←→) to move between days and the up/down arrows (↑↓) to move between weeks.
     Note: If you are using the date/time calendar, these arrows are used to move between time values.

5. To confirm the chosen date, press **Enter**. To leave the calendar without changing the date, press **Esc**.

Note: Remember that the easiest way to select the current date in an empty column is to press the **+** or **–** key on the number pad. If a date already appears, these keys will move the date one day forward or backward, respectively.

To use the time feature:

1. Click the hour or minutes box.

2. Click the buttons to move forward and backward in time.

Copying From the Field Above

Sometimes, when adding new records or revising existing ones, you want a given column to repeat the same value. If you are working in Multi-Record Display Mode, you can simply copy a value from one row to the next.

To copy the value in a given field to the same field in the next record, move the cursor directly **below** the value you wish to copy and do **one** of the following:

- Press **F10** or **Ctrl+D**.
- Click the **Options Menu** button**,** click **Edit** and select **Copy Field Above**.
- Right-click the column in question and select **Copy Field Above**.

Note: If you are in Full-Record Display Mode, this function will copy data from the same column in the previous record (which is currently hidden).

Copying Field Values From a Buffer

The system provides a more sophisticated mechanism that allows you to store the value in a given field into a buffer and then copy that value into another field — even one in a different form.

Example:

You wish to open a new credit card account and change its currency from **$** to **EUR**. To do so, take the following steps:

1. Use the **Search for Entity** feature (see p. 11) to find and open the ***Currencies*** form.

2. Move the cursor to the field in which **EUR** appears (in the **Curr** column).

3. Press **Ctrl+F9**. A small **Copy** window will pop up (see **Figure 26**). The default for the number of the cell in which the value is stored is "1," but can be revised (useful when storing several different values).

4. Click **OK** or press **Enter**. The string "EUR" has been saved in a buffer.

5. Find and open the ***Credit Card Accounts*** form.

6. Type a fictitious value in the **Account Code** and **Credit Card Company** columns (if necessary, open a new line). Note that the latter column expands as you type in it. Also note that the **Curr** column is automatically filled in with the **$**.

7. Move to the **Curr** column and backspace to delete the dollar sign.

8. Press **F9**. A Paste window will pop up with the number "1". If you stored the value in cell number "1", press **Enter** or click the **OK** button to copy the **EUR** value from the buffer into this field. Otherwise, first revise the number.

9. Press **Esc** to leave the ***Credit Card Accounts*** form (if you have trouble leaving the form, see p. 52).

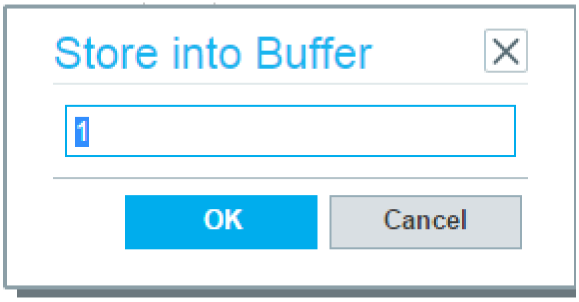


Figure 26: A Copy window pops up

You can store a series of values in several different buffers, each identified by a unique number. So, you can store the value **EUR** in buffer 1, the value **GBP** in buffer 2 and so on.

You indicate the number of the buffer that you wish to use in the **Copy** and **Paste** windows (before pressing **Enter** or clicking **OK**).

In summary, take the following steps to copy field values:

1. Place the cursor on the field you wish to copy, and do **one** of the following:
    - Press **Ctrl+F9**.
    - Click the **Options Menu** button, click **Edit** and select **Store into Buffer**.
    - Right-click and select **Store into Buffer**.
2. A small **Copy** window will pop up. Designate the number of the buffer you wish to use. The next consecutive number will automatically appear the next time that the **Copy** window pops up. You may use the buffer number that appears automatically, or you can erase it and type in another number. The system contains 100 of these buffers, which can be numbered from 0 to 99.
3. Move to the field in which you wish to paste the stored value, and do **one** of the following:
    - Press **F9**.
    - Click the **Options Menu** button, click **Edit** and select **Retrieve from Buffer**.
    - Right-click and select **Retrieve from Buffer**.
4. A **Paste** window will pop up. Specify the number of the buffer that holds the value you wish to copy. The next consecutive number will automatically appear the next time that the **Paste** window pops up. You

may use the buffer number that appears automatically, or you can erase it and type in another number.

Copying an Entire Column

You can also copy all values from an entire form column and then paste them where you like (including into an MS-Word file).

After retrieving all relevant records in the form in question:

1. Move the cursor to the column in question, on any line.
2. Do **one** of the following:
   - Press **Ctrl+H**.
   - Click the **Options Menu** button, click **Edit** and select **Copy Column**.

You can now paste the column of values, using **Ctrl+V**.

Note: In order to copy and paste all values from an entire form column, you must be authorized to **Download Form Data** (in the **Permissions** tab of the ***User Permissions*** form).

Copying a Record Link

Priority enables you to include links to specific form records in a text form or external document (e.g., an Outlook message or Word document). The link is copied into the Windows clipboard and can then be pasted where desired.

To copy a record link:

1. Retrieve the record in question and do **one** of the following:
   - Press **Ctrl+Y**.
   - Click the **Options Menu** button, click **Edit** and select **Copy Record Link**.
   - Right-click the column in question and select **Copy Record Link**.
2. To paste a record link that has been copied, move the cursor to the proper place in a ***Priority*** text form or external document and press **Ctrl+V**.

Importing Files to a Form Record

Several system forms allow you to attach a file to a form record, for example, ***Customer Documents for Task***, a sub-level of the ***Tasks*** form. In order to allow other users in the system to access a file that is stored on your hard disk, use the **Import** function to copy the file onto the ***Priority*** server, in the ..\..\system\mail directory.

To do so, do **one** of the following:

- Right-click the relevant icon and select **Import** from the pop-up menu (see **Figure 27)**:
  - In the column—a paper clip , or
  - The folder icon in the **Direct Activations** menu.
- Press **Ctrl+I**.

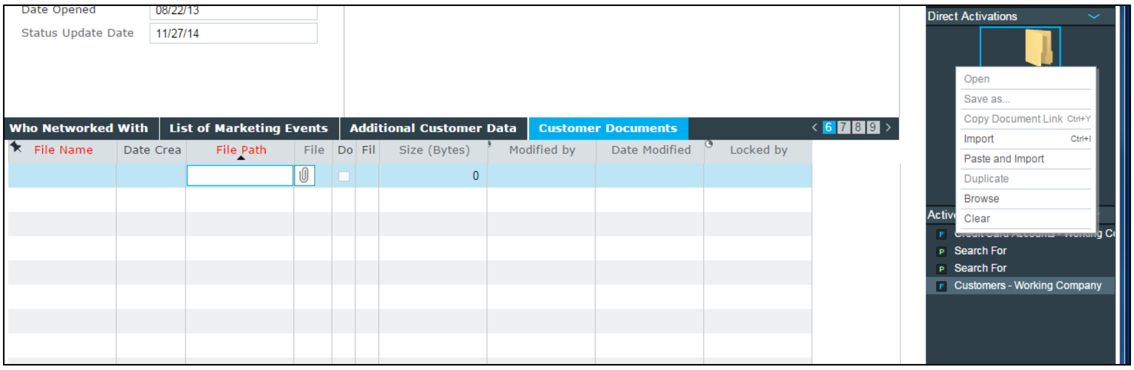


Figure 27: Importing a file to a form

Tip: You can attach several files simultaneously by holding down the **Ctrl** key and right-clicking on each item you want to attach.

In a similar fashion, you can paste a file from a Windows clipboard into an attachment column, at the same time importing it into the ..\..\system\mail directory.

To capture files to a Windows clipboard, do **one** of the following:

- Copy the desired file from the Windows Explorer or from an MS-Outlook attachment (e.g., by **Ctrl+C**).
- Capture a screen shot to the clipboard (e.g., using the **Print Scrn** key or Windows Snipping Tool).

To paste and import the captured file:

- Right-click the relevant column icon and select **Paste and Import** from the pop-up menu.
- Move the cursor to the **File Path** column and press **Ctrl+V**.

Notes:

- The above instructions also apply when attaching images to a form record (e.g., in the ***Part Catalogue***; see **Figure 28**).
- Column icons (e.g., a folder or paper clip) will *not* appear if the **No Image Display** option is flagged (in the **Design** menu accessed from the **Options Menu** button).

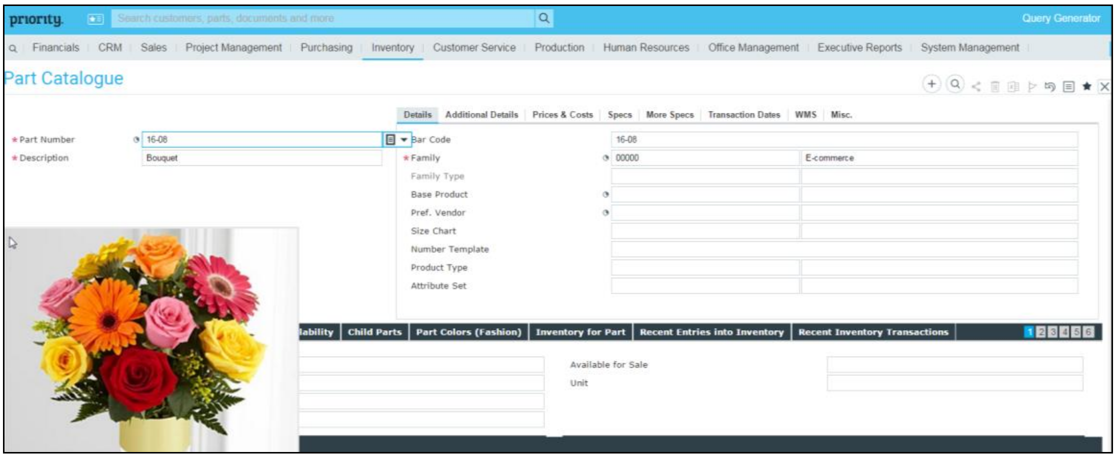


Figure 28: Importing an image to a form record

Attachment forms also contain a **File Status** column, allowing you to update the attachment's status to **Read Only**. This is useful when you are working with the attached file and you do not want other users to view and/or modify the file at the same time. Make sure to return the file's status to **Free** when you are done working with it.

Copying a Link

You can also include links to any files that have been attached to form records in a text form or external document (e.g., an Outlook message or Word document). The link is copied from an attachment column into the Windows clipboard and can then be pasted where desired.

1. To copy a link, do **one** of the following:
   - Press **Ctrl+Y**.
   - Right-click the relevant column icon and select **Copy Document Link**.
   - Click the **Options Menu** button, click **Edit** and select **Copy Record Link**.
2. To paste a link that has been copied, move the cursor to the proper place in a ***Priority*** text form or external document and press **Ctrl+V**.

Duplicating Attachments

To duplicate an attachment, right-click the relevant column icon and select **Duplicate**. A duplicate of the file will be created on the ***Priority*** server and appear as a separate line in the attachments form (i.e., will be attached to the same record in the upper-level form). Each copy created from a given file will be saved with the same name, and a different sequential number will be appended automatically to the end of each file name. Once created, duplicate files can be modified as needed.

Removing Attachments

To remove an attachment from a form record, right-click the relevant column icon and select **Clear**. The file will be removed from this record, but will not be deleted from the ***Priority*** server.

Tracking Documents

You can track certain documents in ***Priority***. While you are tracking a document, every time it undergoes certain changes, you will receive notification by e-mail. Additionally, you may retrieve the document in question in the **Tracking List** form.

To start tracking a particular document, do **one** of the following:

- Click  in the row of shortcuts so that it turns black  .
- Right-click anywhere in the form in question, and select **Track Document**.
- Click the **Options Menu** button, click **Mail**, and select **Track Document**.

To stop tracking the document, do **one** of the following:

- Click  so that it turns white .
- Right-click anywhere in the form in question, and select **Stop Tracking Document**.
- Click the **Options Menu**, click **Mail** and select **Stop Tracking Document**.

Fixing Mistakes

Errors and Warnings

Warning messages appear whenever you make a minor error in form entry or revision. In such a situation, you are warned about the consequences of that error, but are nevertheless allowed to continue. In contrast, when there has been a major error, you receive an error message and must make the necessary corrections in order to continue.

Before you can do anything, you must confirm receipt of the message:

- In the case of an error message, click **OK** or press **Enter**.
- In the case of a warning message, you may either cancel your last move or continue:
- To cancel, press **Esc** or click on the **Cancel** button.
- To continue, press **Enter** or click on the **OK** button.

Note: Sometimes the message refers you to another form, a program or a report that can help you. You can access this entity by clicking on its name in the message.

Undo

Often the best way to correct an error is to undo previous actions.

To undo the actions you have performed within a specific field, do **one** of the following:

- Click  in the row of shortcuts.
- Press **Ctrl+Z**.
- Click the **Options Menu** button, click **Edit** and select **Undo**.

To undo modifications in several fields in the same record, repeat any of the above actions a second time.

Notes:

- You can also clear a *single* field, without affecting any other fields, by pressing **Ctrl+U**.
- You cannot undo actions once you have left the record (e.g., exited the line, moved to Query mode). In such a case, you will have to retrieve the record and revise it manually.

Clearing the Line

Sometimes you may find yourself unable to leave the record because of an error message. This could occur when you open a new record and then change your mind (e.g., because you don’t yet have all the mandatory data that you need to complete the record). Or it may happen when you are trying to update a record and have deleted necessary data or inputted an unacceptable value.

Whenever you find yourself in such a situation, the first step to take is to try to undo your latest changes, as outlined above. If that does not help, you should clear the line. If this is a new, incomplete record, clearing the line will erase it altogether. In the case of an existing record, this action will cancel all modifications you have made and “hide” the record from the form.

To clear the line, take **one** of the following actions:

- Press **F7**.
- Click the **Options Menu** button, click **Edit** and select **Clear Line**.
- Right-click a column and select **Clear Line**.

If you have been working on a new record, you should now begin again. If you have been revising an existing record, retrieve it and make your revisions again.

Note: If you succeeded in leaving the line, the record was modified and clearing the line will **not** return it to its original state. You will have to make any further revisions manually.

Deleting a Record

To delete an unwanted record from the database, position the cursor on that record and do **one** of the following:

- Click the trash can on the row of shortcuts.
- Press **Ctrl+Del** (or **Ctrl+Delete**).
- Click the **Options Menu** button, click **Edit** and select **Delete Record**.
- Right-click a column and select **Delete Record**.

In all cases, a window will pop-up requiring you to confirm the deletion. Click **OK** or press the left arrow key, followed by **Enter**.

Note: Not all records can be deleted in this way. For example, you must run a special program to delete a part. Moreover, you cannot delete a record that is being used elsewhere in the system. For instance, you cannot delete a price quotation once an order has been based on it.

Troubleshooting

The following offers concrete suggestions for dealing with problems you might encounter in a form.

IF…	THEN…
You are **unable to leave the line** or form because you have filled in **erroneous information** (e.g., when recording an order, you specify a customer that does not exist in the database).	1. Confirm the error message. 2. Try to undo your last action (press **Ctrl+Z**). Press it again to undo more actions, if necessary.
You are **unable to leave the line** or form because **mandatory data is missing**.	1. Confirm the error message. 2. Fill in the missing information, if you have it. If you do not, clear the line (press **F7**). In the latter case, the database will **not** be updated.
You have added a new record and **don't know how to confirm the update**.	The database is updated **whenever you leave the line**. This can be done in a variety of ways: ▪ Move the cursor to any other line in the form. ▪ Move to Query mode (press **F11**). ▪ Exit the form (press **Esc**). ▪ Enter a sub-level form (press **F12**).
You are in Full-Record Display Mode and have added a new record. You now want to add another record, but **don't know how to reach the next line**.	Press **PgDn**.

IF…	THEN…
You are in Full-Record Display Mode and **the record you have added seems to have disappeared**.	It hasn't disappeared; it's merely hiding. Press **F4** to move to Multi-Record Display Mode. **Or** stay in Full-Record Display Mode and press **PgUp** to scroll through previous records.
You are **unable to add data to the form**.	You may be in a query form. If so, you can only use this form to view records. Or you may be in Query mode (used to retrieve records) — check if the field you are in is outlined in green (usually, the vertical scroll bar is also green). To return to Data Entry mode, press **Enter**.

Data Retrieval (Queries)

Up till now, you have practiced entering new records into the database. The current section explains how to retrieve existing records in a given form so that you can view and/or revise them. This is in addition to the option of using the **Search Bar** to find a given record (see p. 8).

As you've already seen, the easiest way to access existing data is to retrieve all records. To do so, click the **Options Menu** button**,** click **Run** and select **Retrieve All Records.**

This method, however, is apt to be unnecessarily time-consuming once you have a great many records in a given form. In that case, it is advisable to narrow down the retrieval procedure, based on query conditions (also known as retrieval criteria).

Priority provides a variety of techniques for retrieving selected data in the system's forms. By switching from Data Entry mode into Query mode, you can define any combination of **query conditions** by which the desired data is retrieved when the query is executed.

Alternatively, you can run the **Query Generator**, which features a friendly interface for defining query conditions, setting data-sorting parameters, executing queries and storing frequently-used queries for easy access.

The following section will describe the basic usage of both the Query mode and the Query Generator. More sophisticated query tools are described under **Advanced Data Retrieval and Input** (p. 152).

Working in Query Mode

There are two modes of working with ***Priority*** forms: Data Entry mode for recording data and Query mode for retrieving records. When you are in Query mode, the magnifying glass icon in the row of shortcuts and the column in which the cursor is located are highlighted in green. To move from Data Entry to Query mode, do **one** of the following:

- Click in the row of shortcuts.
- Press **F11** or **Ctrl+R**.
- Click the **Options Menu** button, click **Run** and select **Query/Clear Form**.

If you are working in Multi-Record Display Mode, your cursor will be in the **second** row of the form, and all the other rows will be blank.

To exit Query mode without retrieving any data, simply press **Enter**.

Note: Query conditions are always designated in the **second** row of a multi-record form; the first row is reserved for **operators** (see p. 159).

Designating the Query Conditions

The simplest type of query is one in which you seek to retrieve all records that contain **any** value in one or more specific columns. For this you can use the asterisk (*) symbol, known as a **wildcard**, because it represents an unknown quantity of records.

To retrieve all records that contain a value in one or more specific columns:

1. In Query mode, move to the desired column and type in an asterisk.
2. Repeat the process for additional columns, if necessary.

A narrower type of query is one in which you seek to retrieve all records that contain **a particular** value in one or more specific columns.

To retrieve all records that contain a given value in one or more specific columns:

1. In Query mode, move to the desired column.
2. Specify the desired value, either manually, by Choose list or by Search list.

3. Repeat the process for additional columns, if necessary.

The third type of query is one in which you seek to retrieve all records whose values in a given column **satisfy a certain condition**.

This is where the asterisk wildcard is most useful, because it can be used in conjunction with a string of characters, such as a prefix or suffix. For example, if you type 50* in the **Part Number** column of the ***Part Catalogue***, you will retrieve all parts whose numbers begin with 50 (e.g., 501-101, 501-102). Note that this kind of query condition is always case sensitive.

Note: If you want to record a query condition with a string that includes an asterisk (*) as an actual character, use the backslash "****" as a delimiter. For example, to retrieve all records that contain an asterisk, type *******. For more details, see p. 158.

Executing the Query

To execute a query, do one of the following:

- Press **Enter**.
- Click the **Options Menu**, click **Run** and select **Execute Query**.

Following execution of the query, the retrieved records will be displayed on screen and you will move automatically from Query mode back to Data Entry mode. It is now possible to update any displayed records.

Note: If you are working in Full-Record Display Mode, you will only see the first of the retrieved records. Use the **PgDn** key or the vertical scroll bar to view the rest of the retrieved records.

Examples:

In the ***Currencies*** form, move to the **Currency Name** column and try out the following conditions (remember to enter Query mode):

1. Type **P***. You will retrieve those records whose currency name begins with the letter "P" (Pounds Sterling, Price Index).

2. Type **I*s**. You will retrieve any currency whose name begins with "I" and ends with "s" (e.g., Italian Liras).

3. Type ***n**. Any currency whose name ends with the letter "n" will appear (e.g., Yen).

4. Type **D*M*s**. This will retrieve any currency that begins with “D”, ends in “s” and has an “M” in the middle (Deutsche Marks).

5. Type ***Francs**. You will retrieve the records for Belgian Francs, French Francs and Swiss Francs.

Whereas the asterisk replaces an entire string of characters, the **question mark** is a wildcard that replaces a single character. It is generally used in conjunction with one or more characters and may even be combined with the asterisk.

Examples:

1. Type **Y??** in the **Currency Name** column. You will retrieve any currency that is three characters long and begins with “Y” (i.e., Yen).

2. Type **D?ll?r?**. You will retrieve the record for Dollars.

3. Type ***i?g**. This will retrieve any currency whose name begins with any string of characters, followed by an “i”, followed by any single character, and ending in “g” (e.g., Pounds Sterling).

Sorting Retrieved Records

The records that are retrieved in a form are sorted by one or more columns, determined by the designer of the form. This is the default sort. However, when in Multi-Record Display Mode, you can re-sort records after they have been retrieved.

Clicking once on the title of any column gives you an ascending sort; click again and the data will be sorted in descending order. A further click repeats the ascending sort. A small triangle appears below the column title when you perform a sort – if the sort is ascending, it points up; if descending, it points down.

You can also generate an ascending sort by right-clicking a column and selecting **Sort** from the pop-up menu; select it a second time to obtain a descending sort.

Note: User sorts are always temporary and apply only to the specific query; sort conditions always return to the default each time you execute a new query.

Example:

Retrieve all records in the ***Currencies*** form (click **Retrieve All Records** in the **Run** menu of the **Options Menu**).

1. You will notice that the default sort order in the ***Currencies*** form is ascending according to the **Position** column; i.e., local currency, which is assigned position 1, appears in the first form row, the second currency (assigned position 2) is displayed in the second form row, and so forth.
2. Click on the **Currency Name** column heading. Records will be re-sorted alphabetically by name.

You can experiment with the effects of sorting by clicking and re-clicking on the different columns in the form.

Note: The generator allows you to set sorting parameters together with the query conditions, in advance of the query's execution (see next section). To learn more sophisticated sort methods, see **Advanced Data Retrieval and Input** (p. 152).

The Query Generator

The Query Generator (**Figure 29**) is a powerful tool that allows you to compose, store and reuse queries directed at the specific form in which you open it.

To enter, do **one** of the following from within a form:

- Click Query Generator, located at the top of the screen.
- Press **Shift+F11**.
- Click the **Options Menu** button, click **Run** and select **Query Generator**.

The first column of the generator lists the titles of all of the fields in the upper-level form (in Full-Record Display Mode, these are organized according to their tabs). The second column is for **operators** (e.g. >, <), which can be used in conjunction with data in the **Value** column to define the query conditions. For example, =**>1** in the **Exchange Rate** column indicates a query for all currencies with an exchange rate higher than 1.00. If you use an equal sign (**=**) without specifying a value, you will retrieve all records that have no value in that column.

Alternatively, you can use the **Value** and **To Value** columns to define the query conditions as a closed range of values. For example, **1** to **2** indicates a query for all currencies whose exchange rates fall between 1.00 and 2.00.

To retrieve all records that have been flagged in a particular check box, flag the box that appears in the **Value** column of the appropriate line. To retrieve all records that have **not** been flagged in that check box, select an equal sign (**=**) in the operator column (**without** flagging the box).

The **Sort** column is where you can **prioritize** your query results on multiple levels. The little check box within the **Sort** column is used to define whether a particular sort is in **ascending** or **descending** order. For example, a **1** next to an upward-pointing arrow in the **Currency Name** line indicates that the retrieved currencies should be listed by name in alphabetical order. If you add a **2** next to a downward-pointing arrow in the **Exchange Rate** line, it means that any currencies in the alphabetized list that have the same name should be listed in order of the highest exchange rate.

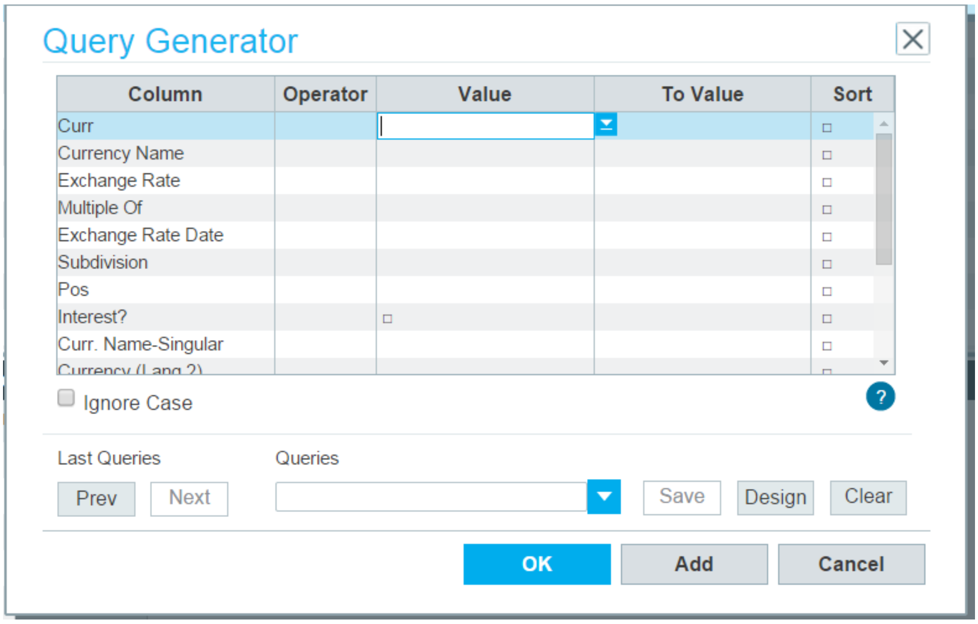


Figure 29: The Query Generator run from the *Currencies* form

Example:

1. Enter the ***Currencies*** form and open the Query Generator.
2. In the **Currency Name** line, type an asterisk in the **Value** column and click the **Sort** column.
3. In the **Exchange Rate** line, type “1” in the **Value** column and “2” in the **To Value** column.
4. Click **OK** to run the query (see **Figure 30**).

The resulting query could be written, “Retrieve all currencies with an exchange rate between 1.00 and 2.00 and sort the results alphabetically by name”.

You can also flag the **Ignore Case** option at the bottom of the generator so that the search is not case-sensitive.

The **Add** button at the bottom of the generator allows you to run a new query that **adds** to the data retrieved in the previous query, without overwriting it. The **Clear** button at the bottom of the generator clears the Query Generator interface so you can compose a new query.

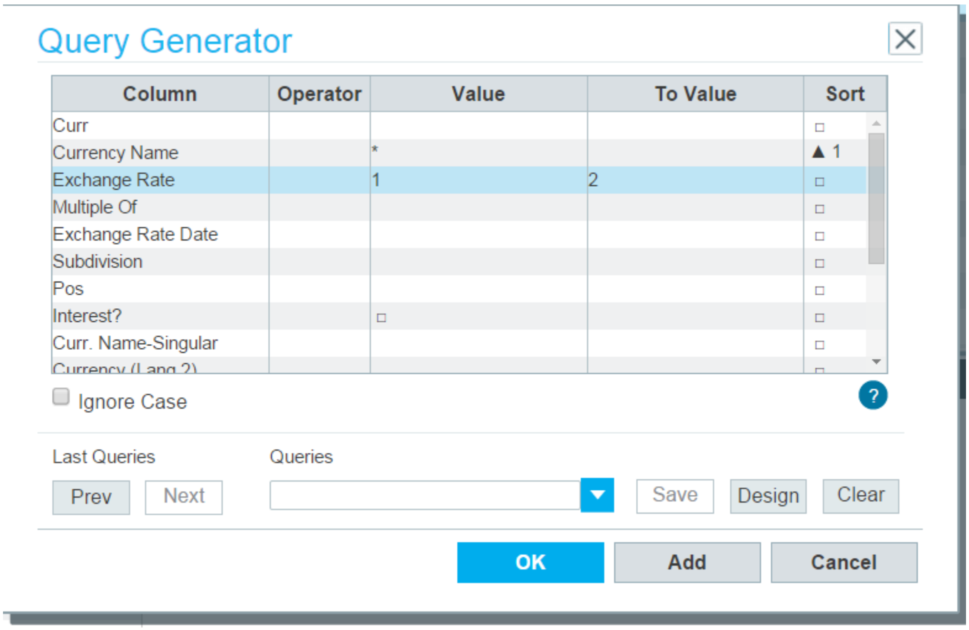


Figure 30: The example query

There are two methods of choosing a date value as a query condition:

- Left-click the calendar icon to choose from a list of relative dates (e.g., tomorrow, week end, month start). This is particularly useful when creating a query that you intend to save and use again.
- Right-click the icon to open the usual calendar.

Example:

1. Enter the ***Currencies*** form and open the Query Generator.
2. In the **Exchange Rate Date** line, select the “Greater than or equal to” operator (>=), click the calendar icon in the **Value** column and select “Start of this Week”.
3. Click **OK** to run the query.

The resulting query could be written, “Retrieve all currencies whose exchange rates were updated since the beginning of this week”.

Saving Queries for Repeated Use

When you open the Query Generator, no parameters are displayed. To automatically reuse the last query made to this form, click the **Prev** button in the **Last Queries** section at the bottom of the generator (or press **Shift+↑**). To reuse the query made before that, click **Prev** again. To return from the next-to-last query to the last query, click the **Next** button (or press **Shift+↓**). The generator automatically saves the last five queries.

In addition, you can save up to nineteen queries of your own choosing for easy retrieval. To do so, define the query, record a name for it in the **Queries** field at the bottom of the generator and click **Save**, before running the query. To call up the query, click on the drop-down button to the right of the **Queries** field and choose the query you just defined. You can even run the query from the form itself, without even entering the Query Generator. Simply choose the desired query from the drop-down list at the top of the screen. To rerun the selected query, click **Show**.

For additional query design options, click the **Design** button at the bottom of the generator. Use the up and down arrows to the right of the screen to arrange the saved queries in the desired order. You can also right-click any query to rename or delete queries that you do not need.

Notes:

- If you save a query under a name that has already been used for another query, a message will appear requesting permission to overwrite the old one.
- If the **Ignore Case** option is flagged, this is saved as part of the query.
- You can also execute any of the first nine saved queries from a given form by pressing **Ctrl+** plus the number assigned to the query in the **Query Design** screen (for example, if the desired query is assigned the number 3, press **Ctrl+3**).
- While your saved queries do not affect other system users, your system manager can run a program that copies saved queries from one user to another.

The Default Query

You can choose one query that you always use with a particular form to be the **default query**. After saving the query as usual and assigning it any of the first nine positions within the list of saved queries, click the **Design** button at the bottom of the generator, right-click the query in question and select **Set as Default Query**. The number to the left of the query will appear in red, indicating that it has been set as the default. The default query executes automatically every time you open the form. If you are in Data Entry mode and you want to execute the query again, you can do so either by pressing **Ctrl+0**, without entering Query mode or the Query Generator. You can also execute it from the Query Generator by choosing it from the drop-down list in the Queries section and clicking OK.

Notes:

- To delete the default query, open the Query Generator, click the **Design** button, right-click the query, clear the check mark that appears by the words **Set as Default Query** and, finally, click **OK**.
- If you assign the default query a position between 10 and 19 within the list of saved queries, it will cease to function as the default query.

Example:

1. Open the Query Generator from the ***Customers*** form.
2. In the **Name** line, specify an asterisk (*****) in the **Value** column.
3. In the same line, click the **Sort** column.
4. Move to the bottom of the Query Generator, record a name for the query in the **Queries** field at the bottom of the generator and click **Save**.
5. Click the **Design** button, right-click the query you just defined and select **Set as Default Query**. Click **OK** to save your selection.
6. Click **OK** to run the query. This query simply retrieves all customers and lists them alphabetically by name. The next time you open the ***Customers*** form, the default query will run automatically. That is, the form will fill up with all customers, in alphabetical order.

Searching for a Specific Record in Query Results

Once you have retrieved a number of records, you may want to perform a search in order to locate a specific one. A search is carried out in a particular column. The first time that you execute a search, you have to define a search pattern (one or more characters). The Search box will display the first record that matches the designated pattern.

To do so, after retrieving a number of form records, move the cursor to the desired column and perform **one** of the following:

- Press **Ctrl+F3**.
- Click the **Options Menu** button, click **Edit** and select **Search**.

- A **Search** window appears, in which you specify the pattern (see **Figure 31**). If you want the search to be case sensitive, remove the check mark from the **Ignore Case** box. Finally, execute the search by clicking **OK** or pressing **Enter**.

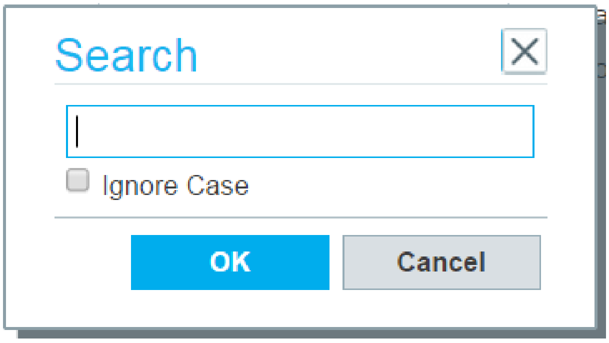


Figure 31: Example of a Search window

Example:

1. Retrieve all records in the ***Currencies*** form (click the **Options Menu** button, click **Run** and select **Retrieve All Records.**)
2. Move to the **Currency Name** column.
3. Use one of the above options (e.g., **Ctrl+F3**) to access the Search window.
4. Inside the window, type "x" and check the **Ignore Case** box.
5. Execute the search.

The cursor will automatically jump to the record for Price Index.

Now, perform the same steps, but type "D" instead of "x". The cursor will jump to the next currency whose name begins with a "D" (e.g., Dollars).

Once a search pattern has been defined, you can use the **Search Again** feature. This repeats a search utilizing the last defined search pattern. To do so, perform **one** of the following:

- Press **F3**.
- Click the **Options Menu** button, click **Edit** and select **Search Again**.

Example:

Search for the next currency with "D" in its name, using one of the **Search Again** options (e.g., **F3**). This search may lead you to Deutsche Marks.

The initial search (when the pattern is first defined) is limited to the column in which the cursor rests, scrolling from top to bottom and back to the top. As movement is circular, the procedure will move you to the first matching field in the form if there is no matching field below the cursor.

When you repeat a search (using the **Search Again** feature), it is always performed in the same column in which the search pattern was **originally defined**, regardless of where the cursor now rests. The cursor, however, will not necessarily move to the matching field. Rather, it will jump to the next matching record, remaining in the column in which it rested before the search was executed.

Hiding Retrieved Records

Occasionally, after retrieving a number of records, you may prefer to view only some of them. You may "hide" certain records so that they are not displayed on the screen, although they continue to exist in the database (that is, the records are **not deleted**).

Records are hidden by clearing the line. There are four ways to do so:

- Press **F7**.
- Click the **Options Menu** button, click **Edit** and select **Clear Line**.
- Right-click any field in the line and select **Clear Line**.

To view hidden records again, simply retrieve them anew.

Problems Retrieving Records

You may sometimes find yourself in a situation in which you are trying to retrieve a record, yet fail to do so. The reason for this is generally because you **forgot to enter Query mode**; remember, when you first enter a form, you are by default in Data Entry mode. First undo your actions (see p. 49). Then simply move to Query mode (e.g., press **F11)**, enter the data again and execute the query.

Query Forms

The system contains special forms intended for record retrieval only. You cannot update or delete records in these forms, nor can you use them to add new records to the database. You can only view existing records. If you accidentally attempt to make revisions in this type of form, you will receive an error message stating, "This is a query form."

Accessing Forms Within Forms

This feature is an efficient way to move from one form to another related one, bypassing the menus. It allows you to view pertinent information in the **source form** without ever leaving the original form. In fact, once you arrive at the source form, you can add new records or revise existing ones and then copy the value in question back to the original form.

Not all columns support this feature, only those that display a magnifying glass button to the right of the column.

To access the target form, do **one** of the following:

- Click the button.
- Press **F6**.
- In an empty column, press the **Space** bar.

Example:

1. Find and enter the ***Audit Trail*** form.
2. Enter the Query Generator and type “Sales*” in the **Value** column of the **Inv. Transaction** line.
3. Click **OK**. All transactions beginning with the word “Sales” will be retrieved. Your cursor should be on a line for a Sales Invoice.
4. Move to the next column (**Doc/Invoice Number**) and click the activation button. You will now find yourself in the ***Sales Invoices*** form, in the original record of the transaction.
5. To return to the ***Audit Trail*** form, click the breadcrumb link at the top of the form or press **Esc**.

Note: It does not matter whether you are in Query or Data Entry mode when you access a form. You will return to whatever mode you were in.

Summed Values

Priority provides a special data retrieval function in form columns that list numerical values (e.g., **Actual Cost**). To calculate the sum of all values in a given number column, move to Multi-Record Display mode (e.g., by pressing **F4**) and right-click the column title. To sum up a portion of the column, move the cursor to the desired number column and press **Ctrl+F8**. The system calculates the sum of all values in that column, from the top of the form to the line in which the cursor is placed. In either case, the calculated sum is displayed in a small pop-up window.

You can then copy the value from the pop-up window (e.g., by **Ctrl+C**), and paste it into a different column, text form or external document.

Note: In order to sum up values in a column, you must be authorized to **Download Form Data** (in the **Permissions** tab of the ***User Permissions*** form).

Online Features

- The **E-mail Address** column found in many forms features an **E-mail** button that opens the ***Compose Mail*** form with the address filled in.
- The **Web Site** column features a **Browser** button that automatically opens your web browser to the given URL.

Updating Data

Once you have retrieved existing data, you may wish to revise it. You already know various methods to do this:

- Select a (different) value from a Choose or Search list (p. 32).
- Copy and paste from a Windows clipboard (p. 32).
- Copy the value from the previous line in the form (p. 42).
- Copy the value from a buffer (p. 42).

The following provides some additional tips for updating data.

Scroll vs Edit Mode

When you are recording new records or viewing retrieved ones, you want to move rapidly through the various fields. But when you are revising an existing record, you often need to be able to move within the field. For instance, if you have recorded an erroneous part number 165543 and want to correct that to 195543, you would like the ability to move to the left, past the correct digits, to the erroneous “6”.

You can choose between rapid movement between columns (scrolling) and movement within a given field (editing) with the press of a button. You simply toggle between Scroll and Edit modes.

When in Scroll mode, the left and right arrow keys ←→ move the cursor from one column to the next. When in Edit mode, the same keys move the cursor from one character to the next, within a given field.

In both modes, you can move to the next column by using the **Tab** key (or **Enter** key) and move to the previous column by pressing **Shift+Tab**.

To toggle between Scroll and Edit modes, employ **one** of the following methods:

- Press **F2**.
- Click the **Options Menu** button, click **Edit** and select **Scroll/Edit**.

Note: You are automatically in Scroll mode whenever you enter a form.

Sub-level Forms

The forms in which you have worked until now were all **upper-level forms** (or *root* forms) entered directly from the menu. Most root forms have at least one **sub-level form** connected to them. Sub-level forms provide further information on a given record in the upper-level form. For each single record in the upper-level form, multiple records may appear in the sub-level. The line in the upper-level form must have data in it.

Note: There is a design tool for organizing sub-level forms (changing their order; hiding those you don't use). For details, see p. 120.

Example:

> As soon as you open the ***Currencies*** form, its sub-level form, ***Past Exchange Rates*** (a query form), is visible directly below it.

Entering the Default Sub-level Form

The tab of the default sub-level form appears in front of the rest of the sub-level tabs and its title appears in bold. This default changes dynamically whenever you select a different sub-level form.

To move into the default sub-level form, first make sure a record has been retrieved in the upper-level form and then do **one** of the following:

- Click on any row in the sub-level form.
- Press **F12**.
- Click on the highlighted sub-level tab.
- Click the **Options Menu** button click **Run** and select **Default Sub-level**.

You can view all records connected to the record that is highlighted in the upper-level form. Note that you are in Data Entry mode, enabling you to add new records and/or revise existing ones in the sub-level.

Tip: To enter the sub-level form without retrieving all records, press **Ctrl+F12**. This is useful when there are many such records, which may take a long time to load.

Returning to the Upper-level Form

To return to the upper-level form from a sub-level, do **one** of the following:

- Click anywhere in the upper-level form, using the left mouse button.
- Press **Esc**.

Choosing a Different Sub-level

Most upper-level forms have several sub-level forms connected to them. When the number of sub-levels exceeds the quantity that can be viewed at one time, numbered buttons appear to the right of the tabs. Click on the buttons to access additional tabs, or use the arrows at either edge of the buttons to navigate back and forth (see **Figure 32**).

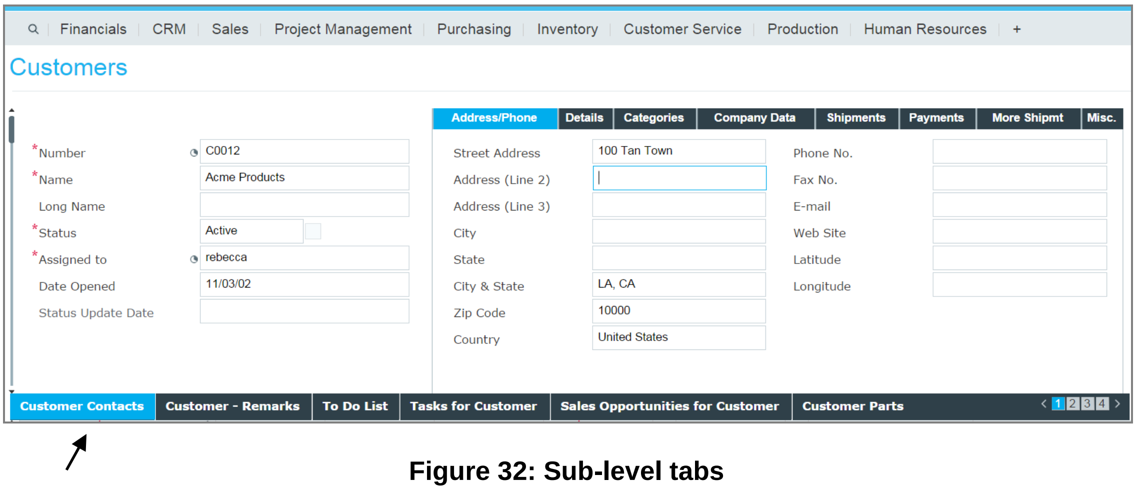


Figure 32: Sub-level tabs

For any given upper-level form, only one sub-level form can be displayed at a time. Initially, this is the first one in the list.

To choose a different sub-level form, do **one** of the following:

- Click the tab for the desired sub-level form.
- Press **F5**.
- Click the **Options Menu** button, click **Run** and select **Sub-levels**.

In the latter two cases, a window will pop up displaying a list of all available sub-levels (its contents will be identical to the sub-level tabs).

You can move between sub-level forms without going back to the upper-level form; either click on the desired sub-level tab, or press **Alt →** and **Alt ←** to move from one sub-level form to another.

Once you choose a different sub-level form, it temporarily becomes the default — until you exit the root form. Its tab will be up front and in bold. As the default sub-level, it can now be accessed again, for instance, by pressing **F12**.

Active and Passive Modes

When you are in Data Entry mode, any upper-level form can be either **Active** or **Passive**. You are in Active mode when you are working in an existing record (e.g., revising data, moving from one column to another). You are in Passive mode when you are scrolling through records, moving from one row to another.

The active or passive state of a given upper-level form affects the display of records in its sub-level.

This is best illustrated via a concrete example.

Example:

1. Enter the ***Customers*** form and retrieve all customer records, then switch to Multi-Record Display Mode. Data appears in the sub-level form.
2. Move from one form column to another **in the same line** (e.g., from **Customer No.** to **Customer Name**). The form remains active and data continues to appear in the sub-level form.
3. Now move down a line. As soon as you do, you will note that the sub-level form no longer displays any data.
4. Remaining in the second line of the form, press any key (e.g., the right arrow, the space bar); the sub-level form, which was empty a moment ago, now displays data for the second customer.

As you have seen, in Active mode, the sub-level form displays all records connected to the highlighted record in the upper-level form.

In Passive mode, however, it is not possible to view the records in the sub-level. This is meant to facilitate the scrolling from record to record in the upper-level form. If records were displayed in the sub-level during scrolling, the movement between records in the upper-level form would become slow and cumbersome.

In short, whenever you move to a different record in the upper-level form, you automatically enter Passive mode. By pressing any key (except, of course, the up and down arrows that move you between rows), you enter Active mode.

Sub-levels of the Sub-level Form

Any sub-level form can have sub-levels of its own. The sub-level of a sub-level functions just like any other sub-level.

Text Forms

There is a special type of sub-level form called a text form, which is frequently identified by the word "Remarks" in the title. For instance, the ***Entry Journal*** form, the various invoice forms, and the ***Compose Mail*** form (see p. 181) have such sub-levels.

When in a text form, you access the Text Editor, which enables you to type a long message using many standard text-editing tools. You can cut, copy and paste text freely, add hyperlinks and change the fonts.

Alternatively, you can enter a text form in read-only mode. To do so, simply perform **one** of the following actions in the upper-level form:

- If the text form is the default sub-level for this form, press **Ctrl+F12**.
- Press **Shift+F5** and then select the sub-level in question.

Using the Text Editor

Once you enter the text form (see **Figure 33**), you can:

- type freely (use **Backspace** and **Delete** keys as needed);
- scroll through the text using vertical and horizontal arrows, or move by clicking the mouse (in a long text, use the scrollbar to the right to access additional lines);
- highlight text (e.g., click and drag as you would in a word processor);
- cut or copy highlighted text and paste it elsewhere;
- undo the last action performed (**Ctrl+Z**);
- redo the last canceled action (**Ctrl+Y**);
- change the font type, size and color;
- set text color;
- modify text alignment;
- add numbers and bullets to text;
- add additional graphic elements such as horizontal lines, images and links;

- perform a spell check (on all text or only the selected portion), and correct any errors by right-clicking the highlighted text and selecting the desired spelling alternative (of course, these highlights will not be visible in printed documents or e-mails created from the text in this form);
- add a comment preceded by a dividing line, the date and time, and followed by a greeting and user signature;
- search for text within the form (**Ctrl+F**);
- manually save text without leaving the form.

Use the Toolbar icons or their shortcut keys to perform the above functions.

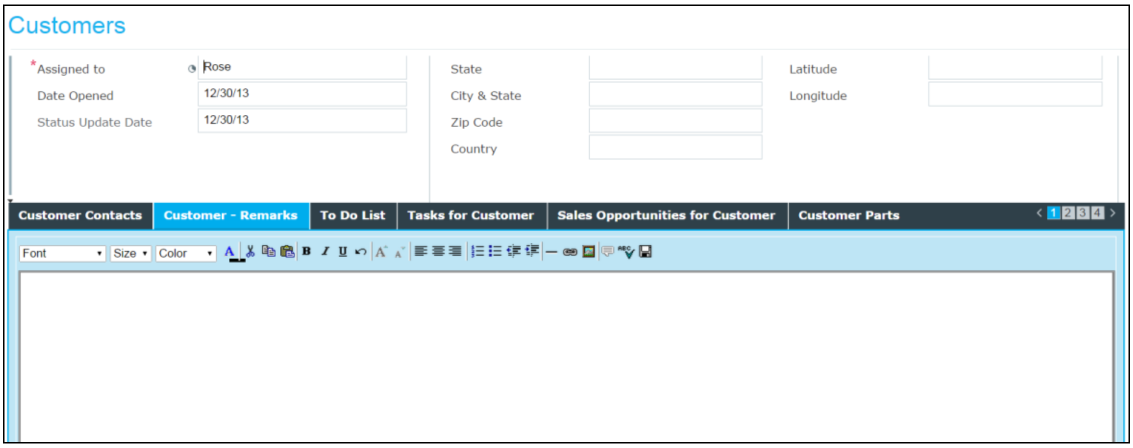


Figure 33: The Text Editor

Notes:

- Not all of the shortcuts use the standard Windows keys. Hold the cursor over each Toolbar icon to display its shortcut. Also see .
- The **HTMLUPDATE** system constant determines whether user comments appear at the top or bottom of text forms throughout the system.
- The **AUTOSAVETEXT** system constant determines how frequently (in minutes) text recorded in text forms is automatically saved, throughout the system. After the third time the text is automatically saved, the text form is closed automatically, enabling other users to access it.

Once you have finished composing/revising your text, leave the form as usual.

Adding Pictures to a Text Form

You can add one or more pictures to a text form, using any type of image file (e.g., *.bmp*, *.jpg*) by entering the picture's URL (see **Figure 34**). To do so, place the cursor at the location in the text form where you want to insert the picture and then perform **one** of the following:

- Click the **Picture**  icon on the Text Editor Toolbar.
- Press **Ctrl+P**.

Alternatively, if the picture in question has already been imported to ***Priority*** as an attachment, you can copy a link to the attachment (e.g., by **Ctrl+Y**) and then paste it instead of the URL (e.g., by **Ctrl+V**).

Insert the picture by clicking **OK** or pressing **Enter**.

Note: Users of Internet Explorer have the option to browse for the file in question.

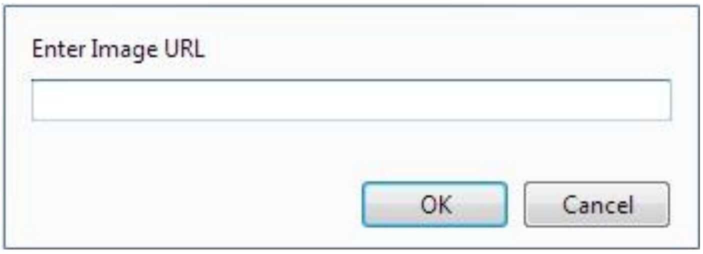


Figure 34: Adding a picture

Additionally, you can paste a picture from the Windows clipboard (e.g., a screen capture or copied image file) into a text form, which will import the picture into the ..\..\system\mail directory.

Customizing User Comments

To customize your default comment format, open the **File** menu in the **Options Menu** and select **User Signature**. A parameter input screen pops up in which to choose between a signature for documents or for text forms. Choose the **in Text Forms** option.

A second parameter input screen appears, in which you can indicate which elements you want to display, choose a font size, and compose a personal greeting (see **Figure 35**).

User information (e.g., **Position**, **E-mail**) is taken from your personnel file. Your **Name** is taken from the **Full Name** column of the ***Users*** form.

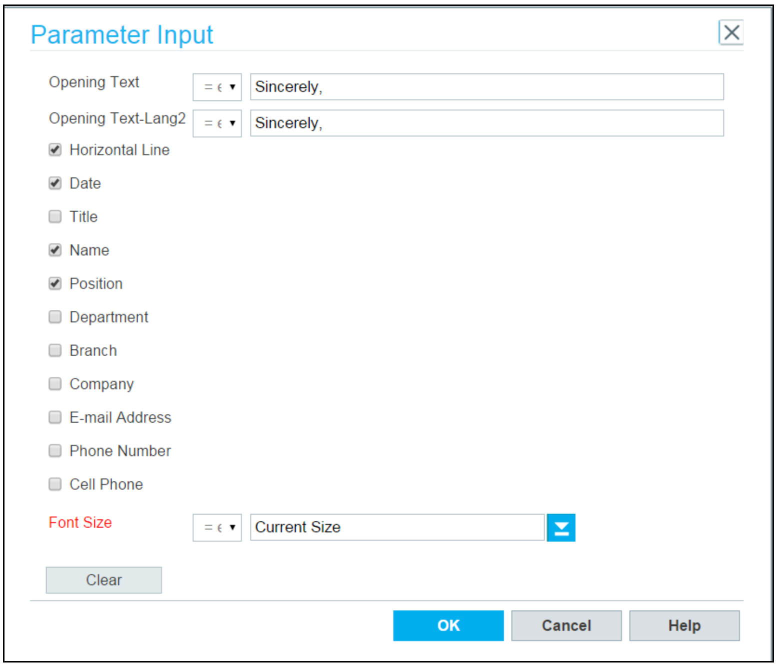


Figure 35: Defining the default comment format

Direct Activations

Many forms offer direct activations of other forms, reports and programs. That is, without ever leaving the form that you are working in, you can move to a target form, print a report or run a program.

The **Direct Activation** feature is useful in a variety of situations. You can use it to:

- Print out an invoice immediately after recording it.
- Display a price quote on the screen before printing it.
- Convert a potential customer into a regular customer.
- Access the ***Chart of Accounts Receivable*** from the ***Customers*** form.

Viewing Available Direct Activations

Whenever direct activations are available for a form, they appear in the **Direct Activations** menu on the right side of the screen (**Figure 36**). This menu includes all forms, reports and programs that can be reached from this form.

Note: Click **Ctrl+F5** to obtain the same list in a pop-up window at the center of your screen.

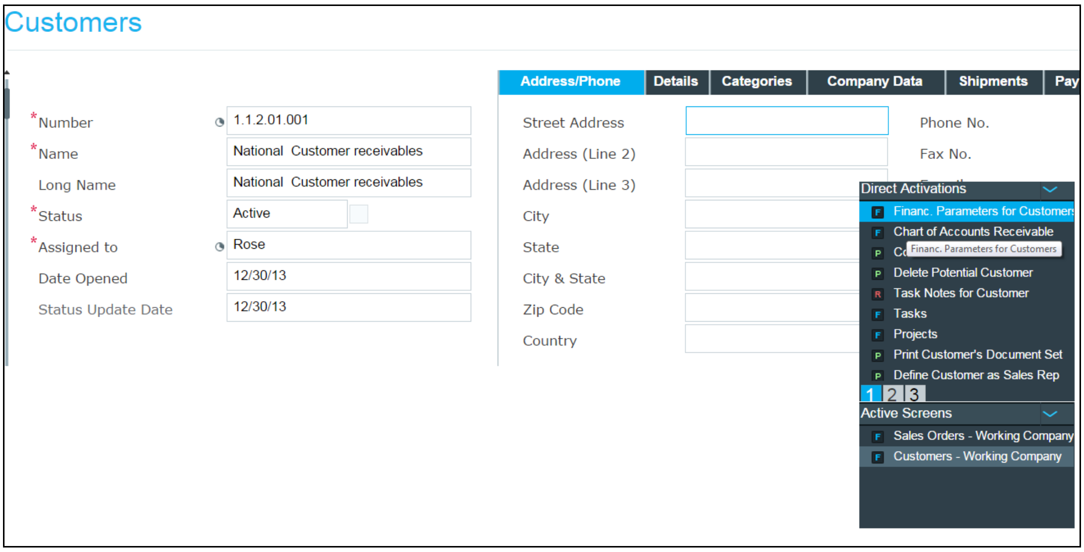


Figure 36: Direct Activations menu in the *Customers* form

The icon preceding each entity title in the **Direct Activations** menu identifies each item's type (i.e., form, report, program). If the list is very long, it is divided into parts, which can be accessed by clicking on the numbered buttons 

.

Example:

When you are in the ***Customers*** form, the **Direct Activations** menu contains many items.

Some of the forms that can be opened are:

- ***Financ. Parameters for Customers***
- ***Chart of Accounts Receivable***
- ***Tasks***
- ***Projects***

Some of the programs that can be executed are:

- ***Convert Potential Cust to Cust***
- ***Delete Potential Customer***
- ***Print Customer's Document Set***

How to Perform Direct Activations

While you can sometimes perform a direct activation from an empty form, it makes more sense to first retrieve pertinent records. For instance, you obviously can't delete a potential customer unless your cursor is presently situated on the record for the potential customer you wish to remove from your database.

When you reach a **form** by direct activation, you can retrieve, modify and/or add records to that form. Alternatively, you can simply leave that form and return to the one in which you were originally working (e.g., press **Esc**). Most importantly, you can use the **Choose Value** feature (see p. 39) to copy a column value from the new form into the original one.

When you directly activate a **report or program**, input is usually taken from the current form record (rather than from a parameter input screen). The cursor will return to this same record after the report is printed out or the program is completed. If the program has updated a value in the record, you will be able to see the updated value (for example, if you have converted a potential customer into a regular customer, you will see that a new customer number has been assigned). For more on reports and programs, see p. 80.

Creating and Using Macros

You will occasionally need to perform a sequence of several actions (mouse clicking, keystrokes) in order to carry out a particular operation. When a set of actions is used frequently, you can define a macro that will perform them automatically.

Defining a Macro

To define a macro, carry out the following steps:

1. Click the **Options Menu** button, click **Run**, select **Macros** and then **Start Definition**.

2. A dialogue box will pop up in which you are asked to assign a name to the macro. This name will later be used to call up the macro, so try to make it as intuitive as possible. (If you specify a name that you have already assigned to an existing macro, you will receive a warning message that the original macro will be overwritten.)

3. After naming the macro, a row of icons appears in the lower left-hand corner of the screen (see **Figure 37**). The rightmost icon () indicates that the macro is being recorded. Perform the actions to be included in their normal sequence. This can include any keystrokes and mouse actions that you desire.

4. Once you have finished the entire sequence of actions, select the **End Definition** command (from the same place) or click the middle icon ().

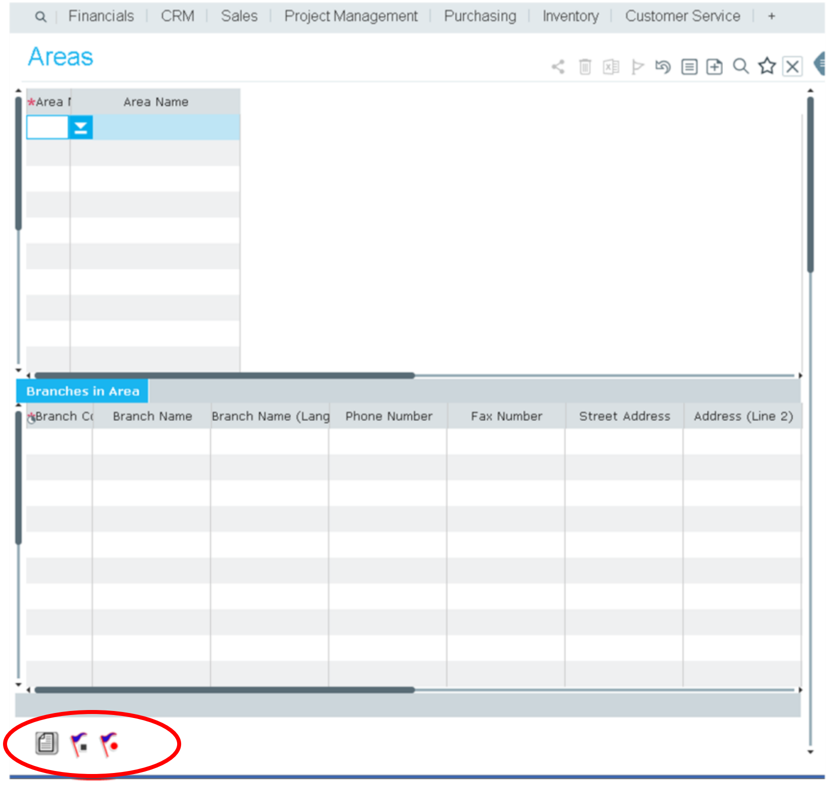


Figure 37: Recording the macro

Example:

You will now create a macro that deletes records.

One way to delete a record is to press **Ctrl+Delete**, then press the left arrow (to highlight the **OK** button in the pop-up window), and finally press **Enter**.

To define a macro that will perform these three actions, proceed as follows:

1. Enter the ***Shipping Zones*** form.
2. Situate your cursor on a zone that has not been assigned to a customer (e.g., one you added).
   Note: The record will be deleted, and you will not be able to recover it by clicking **Undo** (**Ctrl+Z**).
3. Select the **Start Definition** command.
4. In the pop-up window, type: **Delete**. Then click **OK** or press **Enter**.
5. Press **Ctrl+Delete**, then the left arrow key, then **Enter**.

6. Select the **End Definition** command. You can now perform the same actions by executing a macro.

Note: If you placed the cursor on a shipping zone that has been assigned to a customer, you will not be able to delete it. Confirm the error message, move to a different shipping zone and try again.

Running a Macro

To use a macro you have defined, take the following steps:

1. Situate your cursor in the appropriate column.

2. Click the **Options Menu** button, click **Run** and select **Macros**.

3. Do **one** of the following:

- Select **Execute** and choose the desired macro from the list.
- Click **Select a Macro**. A list of available macros will pop up (see **Figure 38**). Select the one you want and click **Execute** (or press **Enter**). To delete the macro, click on the **Delete** button.

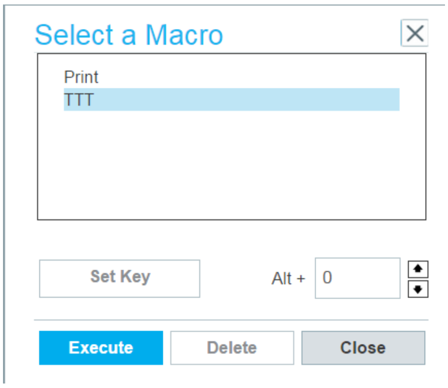


Figure 38: Executing a macro

Notes:

- When a macro is running, this is indicated by  in the lower left-hand corner of the screen.

- To stop a macro while it is running, press **Ctrl+Break** or click , also located in the lower left-hand corner of the screen.

Hot Keys

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. Ten hot keys are available: **Alt+0** through **Alt+9**.

Assigning hot keys is very simple:

1. Again, activate the **Select a Macro** command. The list of available macros will pop up.

2. Select the one you want by moving to it with the ↑↓ arrows.

3. In the **Alt+** field, specify a number between 0 and 9 (or click on the arrows until the number you want to use appears).

4. Click **Set Key**. **Alt+*n*** (i.e., whatever number you designated) is now the shortcut for executing this macro.

5. To use the hot key, press **Alt** followed by the correct number.

Recursive Macros

In order to delete a large number of records, it is possible to define a **recursive macro**. This macro repeats the recorded actions up to 50 times in a row. The process for defining this type of macro is very similar to the one for a regular macro. The difference is that **Select a Macro** is included within the definition.

To define a recursive macro, take the following steps:

1. Select the **Start Definition** command.

2. Assign the macro a name in the pop-up dialogue box (you can use "Delete" again and overwrite the existing macro; if you do, confirm the warning message that appears).

3. Perform the actions in question (e.g., press **Ctrl+Delete**, then the left arrow key, and then **Enter**).

4. Do **one** of the following:

- Click the **Options Menu** button, click **Run** and choose **Select a Macro**.
- Click , located in the lower right-hand corner of the screen.

5. Choose the macro you just defined, and confirm.

6. Select the **End Definition** command or click (located in the lower right-hand corner of the screen).

Again, you will delete a record just by defining the macro. If you now run the macro, it will attempt to delete all remaining records in the form. (Of course, the attempt to delete any shipping zones already assigned to customers will fail and generate an error message.)

Note: The recursive macro you have just defined is a very powerful one, as it **deletes up to 50 records** in a given form. Use it with caution. (The number of recursive macros that can be performed successively can be redefined by the system manager via the **RECURSIVEMACRO** system constant.)

Help

In addition to the features accessed by the **Help** menu in the **Options Menu**, there are several types of on-line help screens available when you are in a form.

Form Help explains usage of the current form. This help can be accessed from any column in the form. Do **one** of the following:

- Click the  button on the upper right corner of the screen and select **Form Help**.
- Press **Ctrl+F1** from anywhere in the form.

Column Help explains the contents of a specific form column. To access this help, move the cursor to the column in question and do **one** of the following:

- Click the  button on the upper right corner of the screen and select **Column Help**.
- Press **F1** from within the column.
- Right-click the column and select **Help**.

You can also access help for any form that appears in the **Direct Activations** menu, as well as any sub-level form whose tab is visible. To do so,

- Right-click the menu item or the tab title.

Similarly, you can access help for pop-up lists of **Direct Activations** and sub-level forms:

- Select the desired entity and click the **Help** button at the bottom of the pop-up screen.

All the above forms of help can be used to access an entity mentioned in the text (e.g., open a form). Simply click on the highlighted name of the item appearing in the message.

Leaving a Form

To exit a given upper-level form (and all its sub-levels), take **one** of the following actions:

- Click ☒ in the row of shortcuts at the top of the form..
- Click the **Options Menu** button, click **File** and select **Exit Form**.
- Right-click the form title in the **Active Screens** menu and select **Close**.
- From the upper-level form, press **Esc**.

If data are displayed while you are trying to leave a form, you will be asked to confirm the exit. This is to prevent you from accidentally leaving a form. This warning message can be disabled by the system manager, if desired.

Note: If you have added or modified the current record, the database will be automatically updated as soon as you leave the form (even if you have not moved to another line). If you want to cancel the new record or the modifications, you must either undo your actions or clear the line **before** you leave it — and before you exit the form.

You can also minimize a form. To do so, right-click the form title in the **Active Screens** menu and select **Minimize**.

Once minimized, the form continues to appear in the **Active Screens** menu. Click on it to view it again.

Reports and Programs

Introduction

Now that you have a thorough understanding of ***Priority*** forms, it is time to move on to programs and reports. You will find that many of the features you have learned how to use in forms (e.g., Choose lists, Search lists, date calendars, wildcards) will also be useful in working with programs and reports. As these last two entities work in a similar manner, their treatment is covered together.

Both programs and reports can be activated either from a menu or from within a form (by means of direct activation). The latter topic was discussed above (p. 72); the current section thus deals with running programs and reports from a menu.

This section contains instructions for setting up Business Process Management (BPM) flow charts, easy-to-use graphic interfaces through which you can control and monitor the progress of most basic system processes.

Programs

In a menu, programs are identified by P. They perform a variety of actions. For instance, you can:

- prepare, copy and/or update selected price lists
- assign a group of parts to a family
- print a batch of invoices, receipts and the like
- assign discounts to a group of customers
- copy a part.

Most programs require input from the user. For example, you might need to indicate, among other things:

- the percentage by which to raise prices in a price list
- which parts are being added to which family
- what invoices to print out
- what customers to assign the discount to.

Once you have selected a program, a parameter input screen will appear. The use of this input screen is identical for programs and reports and is explained in detail below (see p. 109). For now, a simple example will suffice.

Running a Program

Example:

1. Find and run the ***Assign Preferred Vendor to Part*** program.

2. A parameter input screen pops up in which you specify whether you want to assign the vendor to specific parts or to entire part families. Choose the **Part Number** option (see **Figure 39**).

3. A second parameter input screen appears, in which you specify the preferred vendor and the parts to which the vendor will be assigned (see **Figure 40**). The wildcard (*****) that appears automatically in the **Vendor Number** field signifies that by default the program is run for all vendors. In an input screen, a blank field also acts as a wildcard, so clicking **OK** without specifying any particular data will simply assign all vendors to all parts.

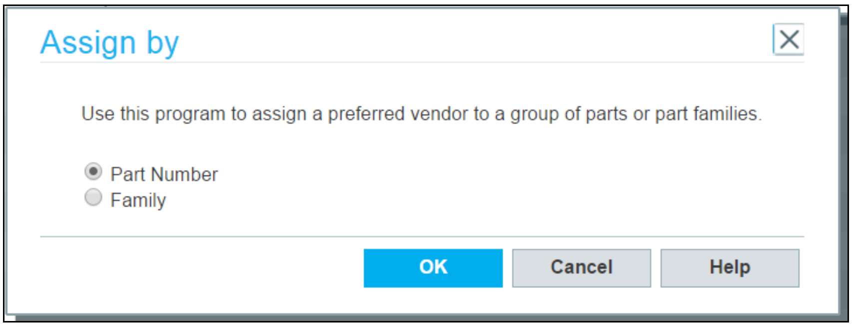


Figure 39: First parameter input screen

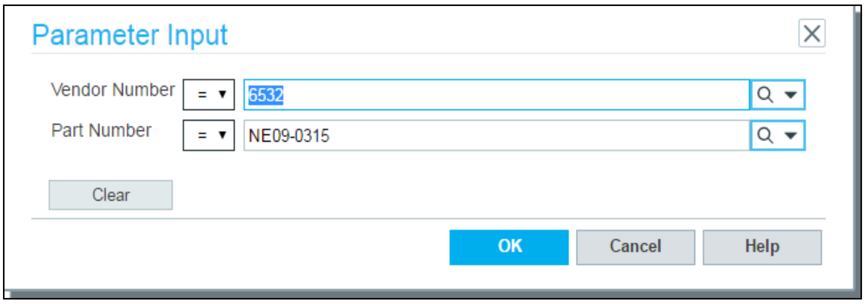


Figure 40: Second parameter input screen

Of course, that would defeat the purpose of the program, so you need to narrow down the effect of the program — say, to a single vendor and a single part. One way to do so is to click the drop-down button next to each field and select the desired item. A Search list will appear; use it to select one vendor and one part. Click **OK**.

Note: For information regarding advanced parameter input, see p. 109.

4. A message will appear requesting confirmation of your input (**Figure 41**). Click **OK**.

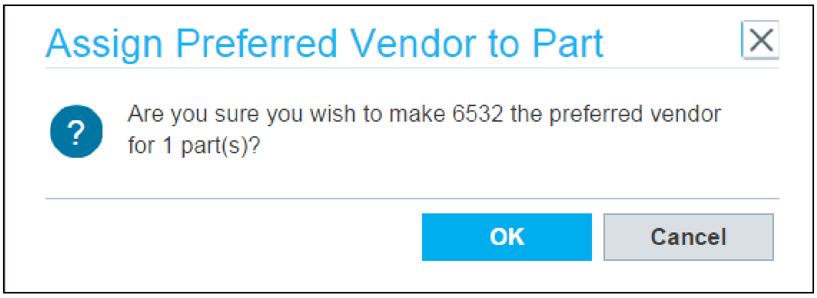


Figure 41: Input confirmation screen

5. In this particular program, the system runs a report displaying the program results (**Figure 42**).

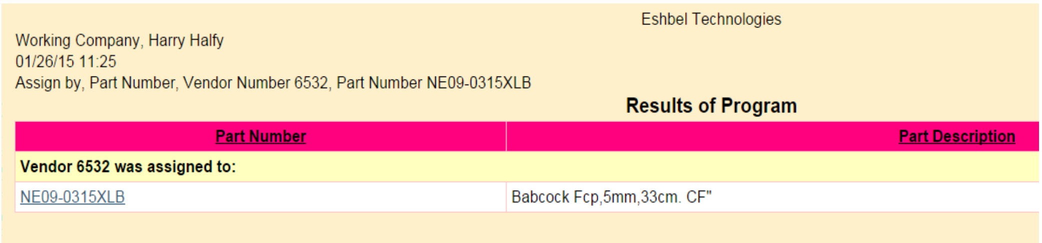


Figure 42: Partial program report

Note: You can cancel the program at any point during the process of execution and parameter input.

Explorers

A special type of program opens an explorer, much like the standard Windows Explorer. The best way to explain the usage of this feature is via a concrete example.

Example:

We will view attributes of specific parts by means of the ***Part Explorer***.

1. Find and run the ***Part Explorer***. A parameter input screen will open, with a wildcard (*) automatically filled in for the **Part Number**. This enables you to call up all parts.
   Note: Again, you can narrow down the effect of the program by selecting specific parts.

2. Click **OK**. Results appear in the **Part Explorer** (**Figure 43**). Click on each item in the left window to see its individual attributes.

3. To exit the explorer, click the **Options Menu** button, click **File** and select **Exit Explorer** or click ☒ in the row of shortcuts.

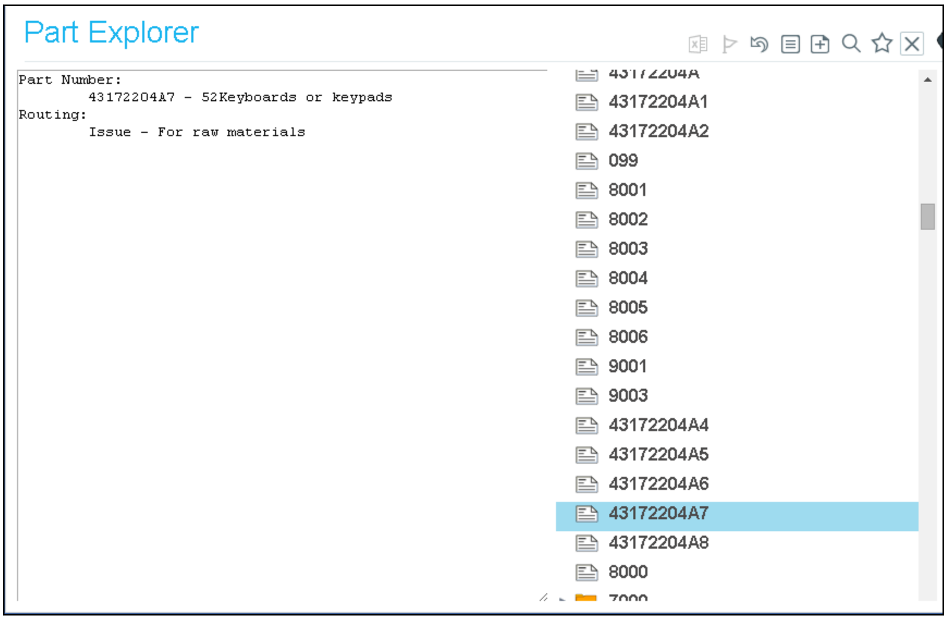


Figure 43: Viewing results in the Part Explorer

BPM Flow Charts

Another special type of programs opens a flow chart (see **Figure 44**), which you can use to manage business processes. In this friendly graphic interface, you can define **statuses** and link them together into defined sequences by means of **paths.** Both statuses and the paths that link them may be assigned user-defined **rules** that trigger a variety of automatic features when certain conditions are met. The end product is a sophisticated workflow mechanism that optimizes the efficiency of the process in question.

Each major document in a defined work process has its own flow chart.

If you are working with statuses for the first time, each chart opens to display the default statuses predefined for that particular document. You can revise the default flow chart by adding statuses, assigning paths and creating rules that reflect the company workflow.

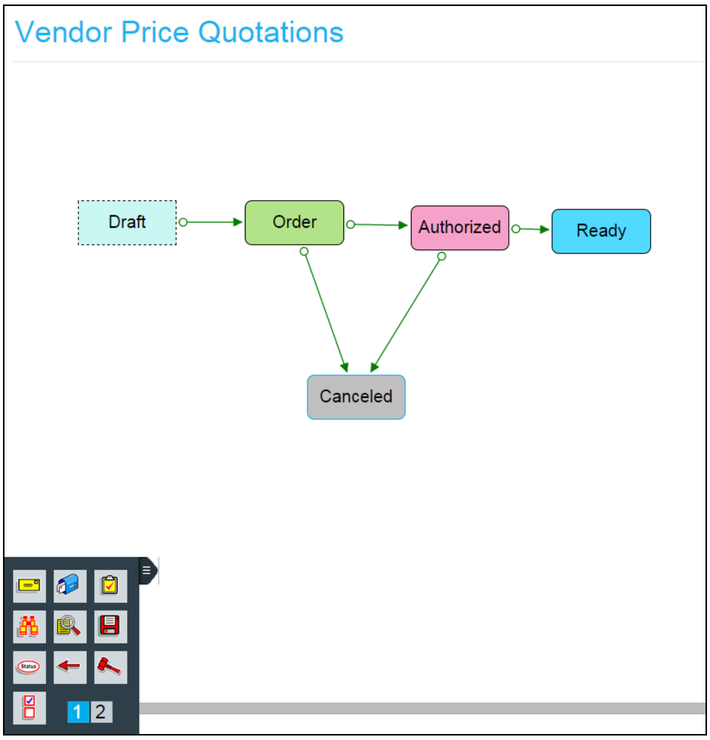


Figure 44: The BPM flow chart for vendor price quotes

Note: Flow charts have a Tool Tray in the lower left corner, with shortcuts for various actions. There are also certain commands in the **Options Menu** that are only available when in a BPM flow chart, while other commands are disabled.

The Initial Status

Each BPM flow chart has a default initial status (usually Draft) that is pre-defined. When you right-click on that status, the **Default Initial Status** line is flagged. This is the status that is assigned to any newly opened document.

In addition, you can define any number of statuses as a permitted initial status. As a result, when users open a new document, even though a default status appears, they can change it to any permitted status without having to leave and reenter the line.

To define a status in this way,

- Right-click it in the flow chart and select **Permitted Initial Status**.

Creating Paths Between Statuses

Paths determine the available options for moving a transaction document from one status to another. Represented by arrows in the flow chart, paths reflect the order in which the various processes in a transaction must take place. When attached to rules, they may also determine the conditions under which a status may change, as well as the way a transaction is processed when it reaches the next status.

Note: To temporarily disable the paths between statuses in the form in which you are working (though properties and rules remain in effect), click the **Options Menu** button, click **Edit** and select **Disable Path Definitions**.

Example:

To create a path from one status to another, perform the following steps:

1. Use the **Search for Entity** feature (p. 11) to find and run the ***BPM Flow Chart – Sales Orders***.
2. Use the mouse to drag the statuses so that they appear in a clear hierarchy on the chart (see **Figure 45** below).
3. To add a path between statuses, do **one** of the following:
   - Click on the Tool Tray.
   - Right-click an empty area on the flow chart and select **Draw Path**.
   - Click the **Options Menu** button, click **Edit** and select **Draw Path**.
4. Use the mouse to draw a line from the **Draft** status to the **In Progress** status.
5. Draw two paths from the **In Progress** status (one to the **Confirmed** status and one to the **Canceled** status) and a path from the **Confirmed** status to the **Completed** status (see **Figure 45**).
6. To save the changes, click on the Tool Tray; or click the **Options Menu** button, click **File** and select **Save BPM**.

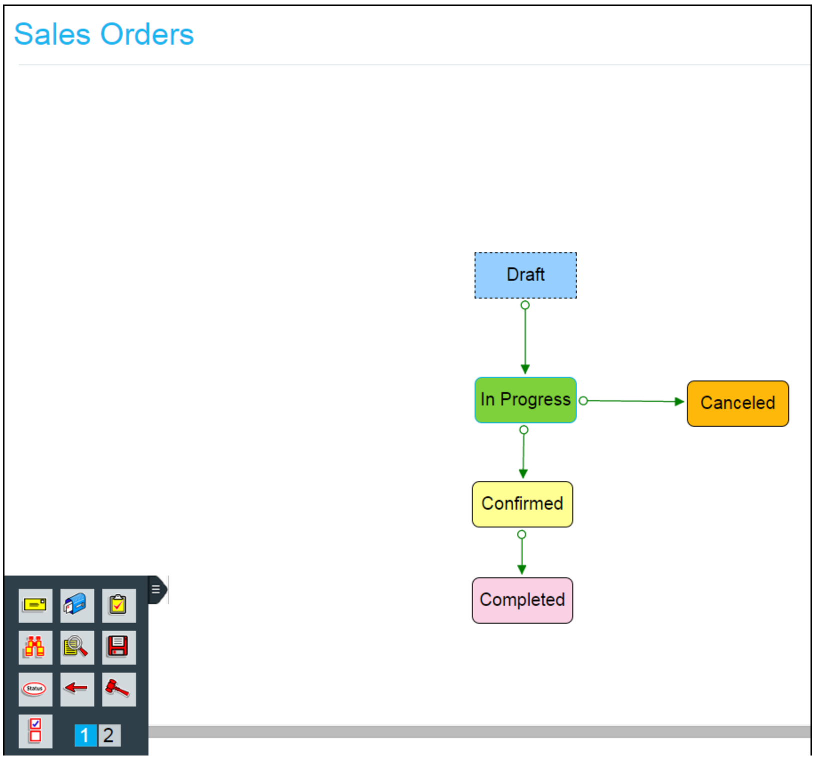


Figure 45: Drawing paths between statuses for sales orders

Defining Rules for Statuses

BPM allows you to monitor workflow by setting up rules that activate system responses when certain conditions are met. You can set up automatic e-mail or text message notification, re-assign the document to a higher-ranking employee, or open a task whenever a document receives a certain status, remains in a certain status overlong or receives a date that falls within a certain time period. You can use rules in tandem with data fields to define precise conditions for the activation of these responses (e.g., the size of the transaction, the importance of the customer).

Note: Text messaging (available in ***Priority Pro*** and ***Priority Enterprise***) must be purchased in a separate module.

You can also define a rule such that e-mail or text messages are sent to an entire user group rather than an individual user. In this case, the document will be assigned to the first user in the group, who can then assign the document to another user in that group.

Note: Groups are an important tool in ***Priority***, with applications in customer relations, mailing and business rules.

To define a group:

1. Enter the ***Groups*** form, found in the ***Contacts*** menu of the ***Office Management*** module.
   Note: This is a multi-company form. Any revisions to it affect all companies.

2. Specify a **Group Name** and **Description**. If you are defining a group for mailing purposes, use the **To/Cc/Bcc** column to determine in which mode each member of the group will receive the message.

3. Enter the ***Users in Group*** sub-level form and list the users that belong to it.

4. To determine the group hierarchy (e.g., for when automatic mail is sent to the first person in the group), use the **Sort** column.

5. If you are defining a group for mailing purposes, you can enter the ***E-mail Addresses*** sub-level form and add external e-mail recipients to your group.

Note: When using BPM to assign a document to a user in the group, if the first user is not available, the document is automatically assigned to the next person in the group. The availability of the user is determined by defined employee hours and absences.

Assigning a Document to a User

One of the most frequently used rules is that which determines the user to which the transaction is assigned at each stage of the process.

Example:

Let’s create a rule by which a sales order that receives the **In Progress** status is assigned to the sales manager when it exceeds a certain value and is assigned to one of the members of the "Sales" group when the order value is lower:

1. Follow the instructions on p. 87 to create a group called “Sales”.
2. In the sales orders flow chart, right-click the **In Progress** status and select **Rules**.
3. The Define rules dialogue box opens (**Figure 46**). In the **Rule Description** column, type "In Progress Status Rule".
4. In the **Do the following** section, select **Assign it** in the first text box, **group** in the second text box, then **Sales** in the third. Click **OK**.

5. Now reopen **Rules**. The **List of Rules** dialogue box will appear (see **Figure 47**) displaying the rule you just created. Click **New**.
6. In the **Rule Description** column, type "In Progress Rule: Total Price".
7. In the **Do the following** section, select **Assign it** in the first text box, then select the username of the sales manager in the third text box.
8. In the **If** section, select **Total Price** in the second text box, **is greater than** in the third, and type “5000” in the fourth box that appears next to the third. Click **OK**.
9. Exit the flow chart (press **Esc**) and click **OK** to save your changes.

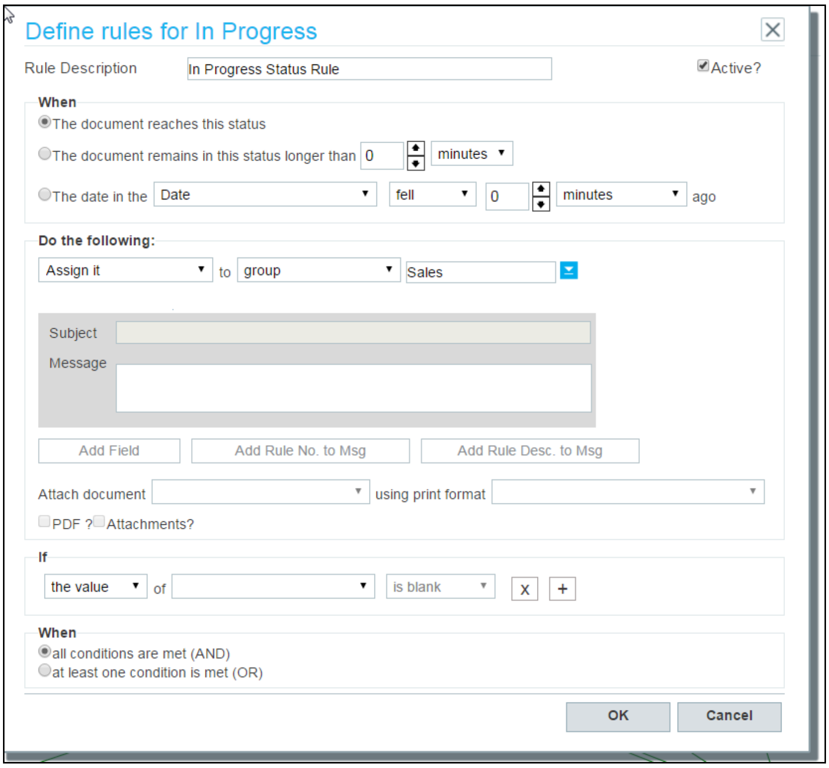


Figure 46: The Define rules dialogue box

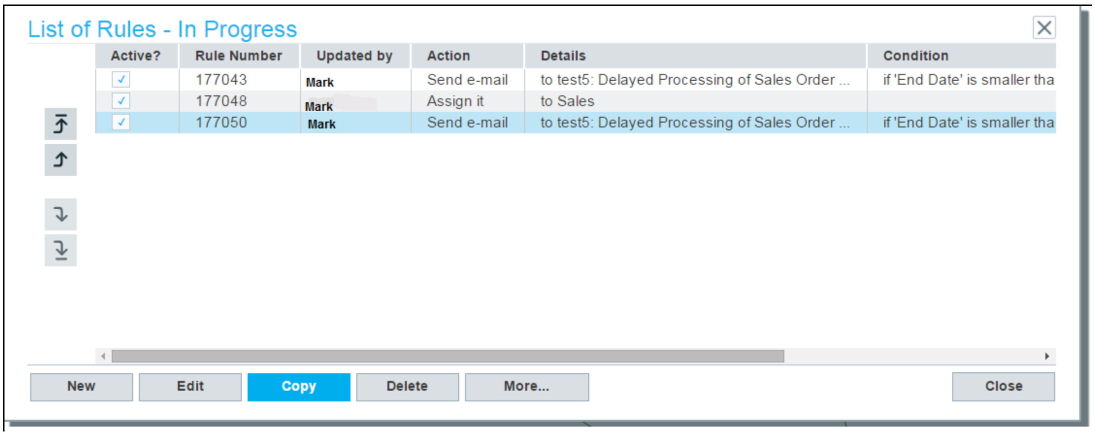


Figure 47: The List of Rules dialogue box

You have now defined the following rules for the **In Progress** status:

- sales orders in progress that are worth up to 5000 dollars are assigned to the first available user in the “Sales” group (based on the defined group hierarchy), while
- sales orders in progress that are worth more than 5000 dollars are assigned to the sales manager.

Open or retrieve a sales order and adjust it so that its total price is over 5000. Now change its status to **In Progress**. Click the **Scheduling** tab and you will see the sales manager's username in the **Assigned to** column.

Sending an E-mail or Text Message Notification

It may be sufficient to notify the sales manager in the case of a large order, rather than reassign it.

Example:

Let’s modify our previous example:

1. Reopen the flow chart, and right-click the **In Progress** status. In the **List of Rules** dialogue box, select the second rule we created in the previous example and click **Edit**.
2. In the **Do the following** section, replace **Assign it** with **Send e-mail** in the first text-box, and select the sales manager as the e-mail recipient.
3. In the **Subject** column, type "Sales Order Price Update".

4. In the message area, type “Sales Order No.”, then click **Add Field** and choose the **Order** column title from the Choose list under the message area. Continue the sentence “ has reached a final price of over ”, then click **Add Field** and choose the **Final Price** column title (see **Figure 48**). Complete the sentence by adding “dollars.” Click **OK**.

Now open another order worth more than 5000. You will see that it is still assigned to the “Sales” group. Now check your outbox to see that your notification was sent to the sales manager.

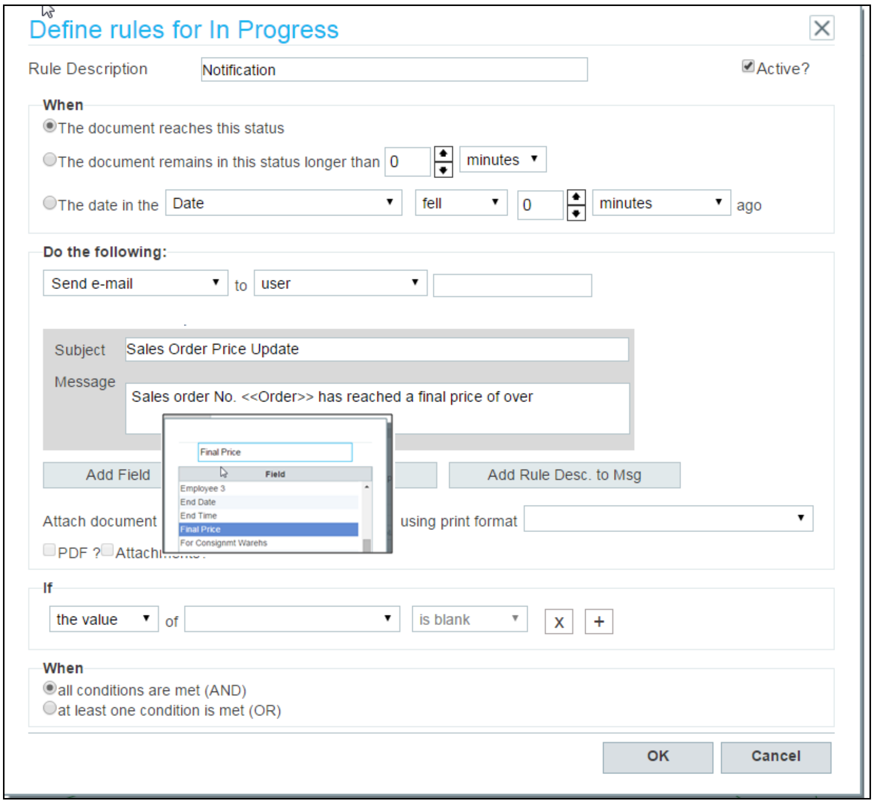


Figure 48: Illustration of the current example

Notes:

- The **Add Field** Choose list includes selected To Do item fields as well as form fields.
- Use the **Add Rule No. to Msg** and **Add Rule Desc to Msg** buttons to add the automatically assigned rule number and the description you recorded to the text message.
- You can add a document's attachments to the e-mail sent for the document by flagging **Incl. Attachments.**

- Use the **If** section to define the condition (or conditions) that will cause the message to be sent (e.g., when a certain column receives a specific value or range of values, or the result of a designated expression).
- In the bottom **When** section you can determine that all conditions must occur at the same time (the AND condition) in order to trigger the message, or you can use independent conditions (the OR condition) where it is enough for only one of the conditions to occur in order to trigger the message.

Transactions That Are Overdue For a Status Change

As mentioned previously, you can also reassign a document, change its status or notify an e-mail or text message recipient when the document has remained in a particular status past a defined period of time, or open a task for a designated user.

Example:

1. Reopen the flow chart, right-click the **In Progress** status and select **Rules**. When the **List of Rules** dialogue box opens, click **New**.
2. In the upper **When** section, select the second option and specify two days as the permitted processing period.
3. In the **Do the following** section, select **Assign it** in the first text box, and the sales manager's username in the third.
4. Click **OK**. Save and exit the flow chart.

From now on, if a sales order remains **In Progress** for over two days, it will be re-assigned to the sales manager.

Documents That Are Assigned a Given Date

You can also define a rule that takes into account a date appearing in the form in question.

Example:

The following rule sends mail to the sales manager when a sales order remains **In Progress** past its defined **End Date** (the planned date for completing the order).

1. Reopen the flow chart, right-click the **In Progress** status and select **Rules**. When the **List of Rules** dialogue box opens, click **New**.
2. In the **Rule Description** column, type "Overdue Date Rule".
3. In the upper **When** section, select the third option. Select **End Date** in the first text box, **fell** in the second text box, then **1** and **Days** in the third and fourth.

4. In the **Do the following** section, select **Send e-mail** in the first text box, and the sales manager's username in the third.

5. In the **Subject** column, type "Delayed Processing of Sales Order".

6. In the message area, type “The processing of Sales Order No. ”, then click **Add Field** and choose the **Order** column title from the Choose list under the message area. Continue the sentence “ has been delayed past the defined end date: ”, then click **Add Field** and choose the **End Date** column title (see **Figure 49**). Complete the sentence by adding a period. Click **OK**.

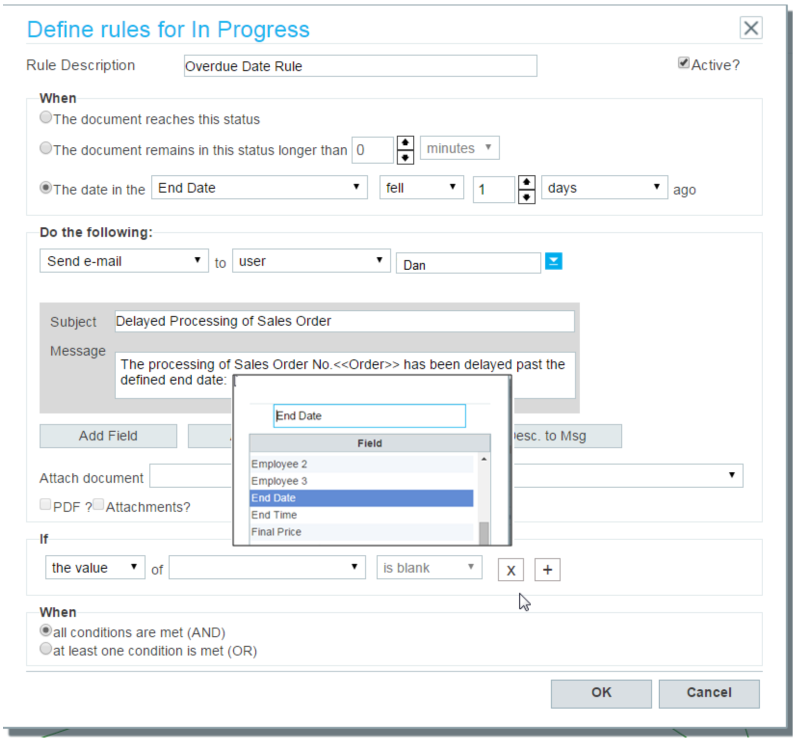


Figure 49: Rule based on document date

Defining Rules Using Function Expressions

In the first example, we defined a rule that is activated only if the value of one of the form columns (**Total Price**) exceeds a certain fixed value (5000). You can also define an expression in the same text box, using any combination of fields and functions, by clicking on the *fx* button that appears to the right of the box.

Example:

The following rule sends mail to the sales manager when a sales order remains **In Progress** for more than 10 days, and more than 2 days have passed since its defined **End Date**.

1. Reopen the flow chart, right-click the **In Progress** status and select **Rules**. When the **List of Rules** dialogue box opens, click **New**.

2. In the **Rule Description** column, type "Delayed Processing Rule".

3. In the upper **When** section, select the second option and specify ten days as the permitted processing period.

4. In the next section, select **Send e-mail** in the first text box, and the CEO's username in the third.

5. In the **Subject** column, type "Delayed Processing of Sales Order".

6. In the message area, type “Sales Order No. ”, then click **Add Field** and choose the **Order** column title from the Choose list under the message area. Continue the sentence “has not yet been completed.”

7. In the **If** section, select **End Date** in the second text box, **is smaller than or equals** in the third, place the cursor in the fourth box that appears next to the third and click the function (*fx*) button that appears to the right of the box (see **Figure 50**).

8. In the dialog box that opens, click **Add Predefined Expression**. Select the **end of last month** expression. A function expression representing the beginning of the present month less one day appears in the dialogue box (see **Figure 50**). Click **OK** to exit the dialogue box. The function expression you defined now appears in the fourth text box in the **If** section.

9. Click **OK**. Save and exit the flow chart.

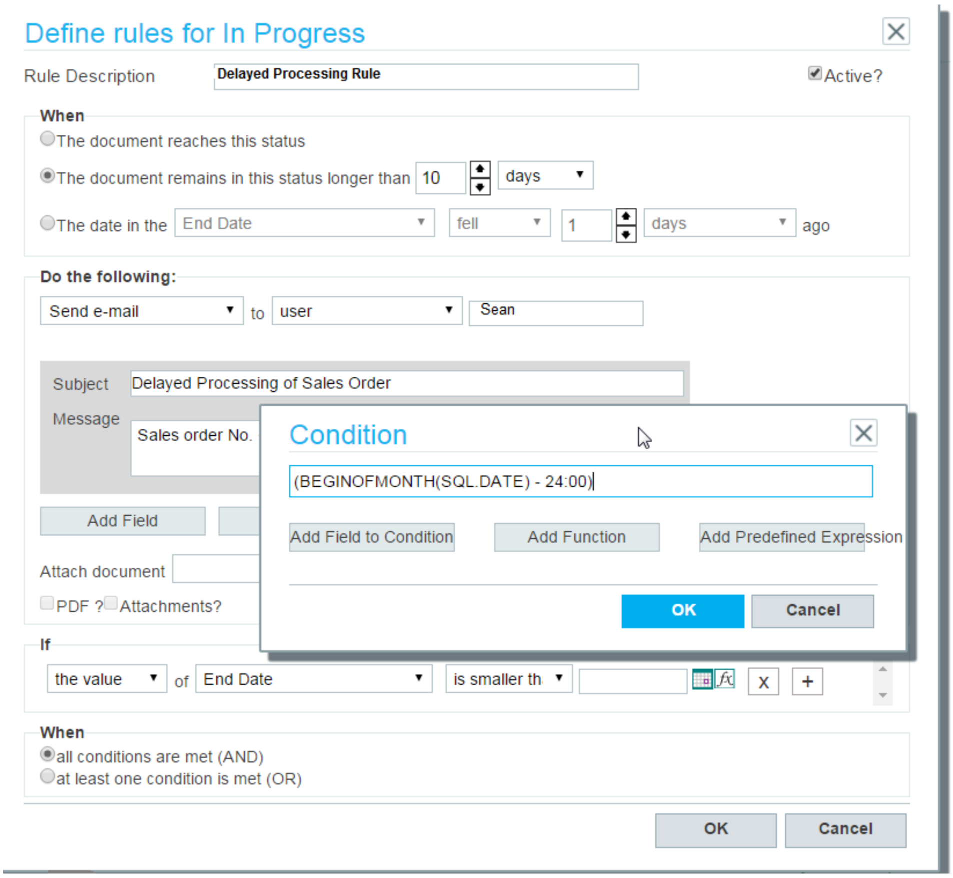


Figure 50: Rule using a function expression

Finding and Organizing Rules

There may be many rules defined for each status. In the **List of Rules** dialogue box (which appears after the first rule has been defined, whenever you select **Rules**), you can view all rules defined (see **Figure 51**).

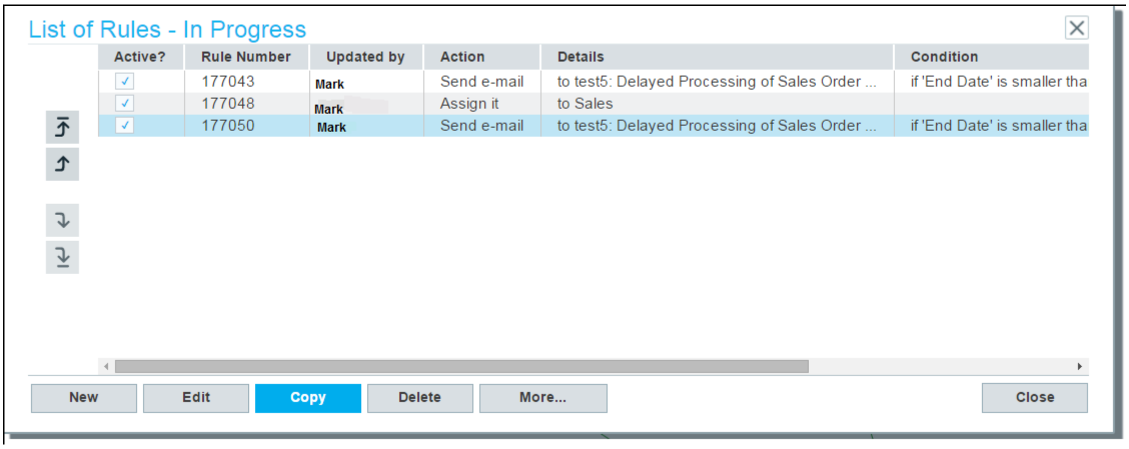


Figure 51: The List of Rules dialogue box

- To search for a specific rule, click the **More** button and select **Search**. This allows you to do a text search within the list of rules (e.g., search by the rule description). Alternatively, select **Report** to print a report of the rules defined for the status. The report includes the **Rule Number** and **Rule Description** as well as other identifying information useful for finding the rule you want.

- To change the order of the listed rules, use the up and down arrows on the left (e.g., put the most important ones at the top for easy access).

- If you do not want a certain rule to operate, remove the checkmark from the **Active** column, or click **Delete** to completely remove it.

Creating New Rules from Existing Ones

An easy way to create a new rule for both statuses and paths is to copy an existing one and revise it. Simply select the desired rule in the dialogue box (see **Figure 51**) and click **Copy**. A duplicate of the selected rule will appear, which you can revise by clicking the **Edit** button.

Running the Tabula Task Scheduler

The sending of time-based messages will only work if the **Tabula Task Scheduler** is running and has been set up properly. The scheduler scans all active documents for any defined time limits and activates the notification process when it finds an expired limit. It also sends a daily error report for any time-activated changes (e.g., status, assigned user) that have malfunctioned.

Note: It is recommended to decrease the frequency of the scheduler scan to once every two hours.

Basic instructions for setting up the scheduler can be downloaded from the ***Priority*** web site. In addition, the system manager needs to make sure that:

- an outgoing mail application other than MS-Outlook is defined on the workstation where the scheduler is installed.
- the **Send reminders about document status** program is flagged as *Active* in the **Define TTS Tasks** form**.**

BPM Error Reports

An escalation rule may trigger a change of user or status when such a change is not permitted in the document in question, based on defined form logic. For example, a Customer Shipment may not receive the “Final” status if it has not yet been itemized. In such a case, the form in question presents an error message; however, since escalation rules are applied automatically when the form is closed, error messages are not possible. Instead, ***Priority*** provides a report called **BPM – History of Errors** (menu path: ***System Management → System Maintenance → Periodic Maintenance → BPM Maintenance***) to document any actions that fail for this reason.

You can set the scheduler to send the error report to a designated e-mail address at regular intervals, where it can be checked routinely for failed actions. To do so:

1. Open the **Define TTS Tasks** form. Move to the task named “Send Reminders – error log by e-mail (change the address)”.

2. In the **Command** column, move to the end of the command line and replace the phrase “any_email_address@mycompany.com” with the desired address.

Defining Rules for Paths

You can further optimize your workflow by assigning rules to the paths between statuses, rather than to the statuses themselves. Path rules allow you to assign behaviors to a status when it is reached from a specific preceding one. Path rules also allow you to designate which users or groups of users are permitted to move a document from one particular status to another. As with status rules, this rule can be made conditional on document data.

Note: Paths that have been assigned rules display a small red circle in the middle of the line.

Example:

Let’s return to our sales order flow chart:

1. Reopen the flow chart. Right-click the path between the **Confirmed** status and the **Canceled** status, and select **Rules**.
2. In the **Do the following** section, select **Allow status change**. In the third text box, select any username (except yours).
3. Click **OK**. The new rule establishes that once a sales order has been confirmed, it can only be canceled by the specified user.
4. Save and exit the flow chart.
5. Retrieve a sales order and assign it the **Confirmed** status. Now try to change the status to **Canceled**.

If you want to disable a particular rule (for either a status or a path) you can remove the check mark from the **Active** option in the **Define Rules** dialogue box or in the **List of Rules** dialogue box.

Note: To view all rules created for a given status or path, use the **List of BPM Rules** form in the **BPM Maintenance** menu or click the **More** button in the **List of Rules** dialogue box, and select **Report**.

Revising Statuses

To revise an existing status, right-click the status and select the desired command from the pop-up menu:

Note: The same commands can be accessed from the **Edit** menu in the **Options Menu**.

- **Rules:** Opens the **Define rules…** dialogue box, in which you define status rules.
- **Properties:** Opens the **Properties of…** dialogue box, in which you define attributes of the status, such as whether a document in this status can be revised or will be included in your to do list.
- **Set Color:** Allows you to select a background color for the status (as displayed in the flow chart).
- **Rename:** Allows you to choose a new name for the status.
- **Record Remark:** Allows you to record a brief remark for the status that will appear as a tooltip in the flow chart.
- **Delete:** Removes the status and its paths from the flow chart (and makes it inactive, that is, the status will not appear in Choose lists).

Note: Any status that you delete is stored in memory together with all other statuses that are not in use in the current flow chart. These statuses appear in the **Select Status** window whenever you add a new status.

A given document may be assigned numerous statuses. In order to keep your flow chart easily comprehensible, special care must be taken both in the color-coding of statuses, and in their physical grouping. For example, you may want to situate all statuses that involve closing, canceling or freezing the document at the bottom of the screen, and color them red. In addition, you may find it useful to record a brief remark pertaining to each status, which appears when you hover over that status in the flow chart.

Adding New Statuses

To add a new status to the flow chart, perform the following steps:

1. Do **one** of the following:
   - Click on the Tool Tray.
   - Right-click an empty area on the flow chart and select **Add Status**.
   - Click the **Options Menu** button, click **Edit** and select **Add Status**.
2. The **Select Status** window will appear. Click the **New** button.
3. A dialogue box called **Properties of the New Status** opens. Record a **Name** for the new status, and flag the appropriate status properties.

Viewing a History of BPM Flow Chart Changes

Use the **BPM – Track Changes** form or report in the **BPM Maintenance** menu to view all changes made in any BPM chart (e.g., new status, path deleted, new rule, change in status or status attributes).

Copying a BPM Flow Chart

You copy an existing flow chart to a clipboard, from which it can pasted into another company or even to another installation of ***Priority***. To do so:

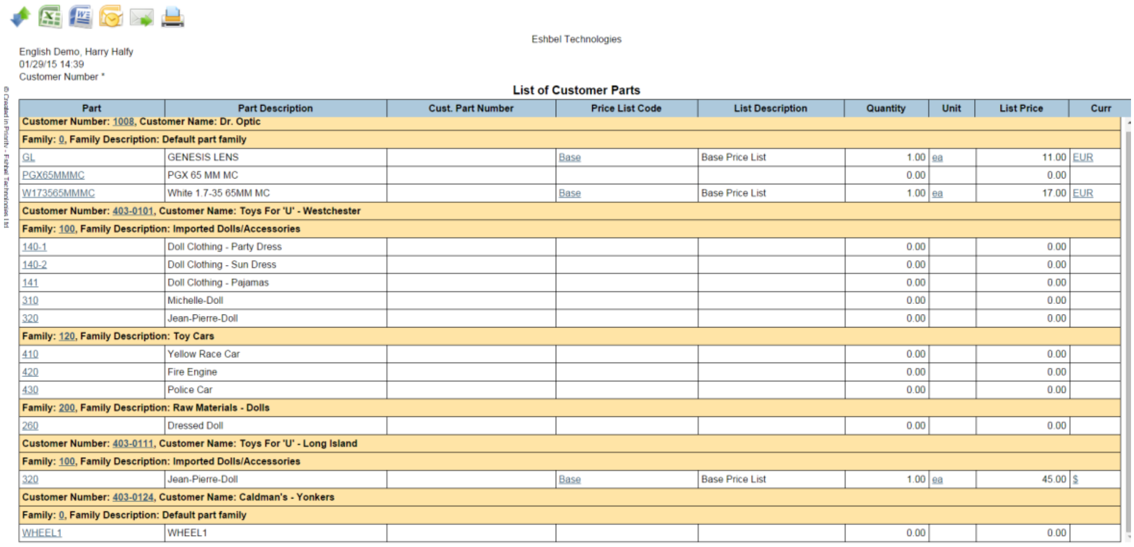
1. Open the flow chart.
2. Click the **Options Menu** button, click **Edit** and select **Copy Flow Chart**.
3. Open the same chart in the target company.
4. Click the **Options Menu** button, click **Edit** and select **Paste Flow Chart**.
   Note: You can also paste the flow chart into a Notepad file and save it as a backup. The saved text can then be copied and pasted into a target chart using the **Paste Flow Chart** option.

Reports

In a menu, reports are identified by the R or P icon.

Report Format

There are several different types of reports: standard, tables, graphs, documents, BI reports and charts. All reports open in your web browser (see **Figure 52**).



Eshbel Technologies

English Demo, Harry Halfy
01/29/15 14:39
Customer Number *

List of Customer Parts

Part	Part Description	Cust. Part Number	Price List Code	List Description	Quantity	Unit	List Price	Curr
Customer Number: 1008, Customer Name: Dr. Optic								
Family: 0, Family Description: Default part family								
GL	GENESIS LENS		Base	Base Price List	1.00	ea	11.00	EUR
PGX65MMMC	PGX 65 MM MC				0.00		0.00	
W173565MMMC	White 1.7-35 65MM MC		Base	Base Price List	1.00	ea	17.00	EUR
Customer Number: 403-0101, Customer Name: Toys For 'U' - Westchester								
Family: 100, Family Description: Imported Dolls/Accessories								
140-1	Doll Clothing - Party Dress				0.00		0.00	
140-2	Doll Clothing - Sun Dress				0.00		0.00	
141	Doll Clothing - Pajamas				0.00		0.00	
310	Michelle-Doll				0.00		0.00	
320	Jean-Pierre-Doll				0.00		0.00	
Family: 120, Family Description: Toy Cars								
410	Yellow Race Car				0.00		0.00	
420	Fire Engine				0.00		0.00	
430	Police Car				0.00		0.00	
Family: 200, Family Description: Raw Materials - Dolls								
260	Dressed Doll				0.00		0.00	
Customer Number: 403-0111, Customer Name: Toys For 'U' - Long Island								
Family: 100, Family Description: Imported Dolls/Accessories								
320	Jean-Pierre-Doll		Base	Base Price List	1.00	ea	45.00	$
Customer Number: 403-0124, Customer Name: Caldman's - Yonkers								
Family: 0, Family Description: Default part family								
WHEEL1	WHEEL1				0.00		0.00	

Figure 52: Example of a standard HTML report

Tables differ from standard reports in two major areas. First, they summarize information. Whereas reports provide a great deal of specific data over several pages, tables succinctly provide a broad picture of the situation. Second, tables can provide information (e.g., sum totals) per row and column).

There are several types of graphs: bar, line, area and tree graphs. The key to each bar, area or line appears below its appropriate scale. In the key that appears below the graph, a bar is denoted by a shaded rectangle, an area by a shaded triangle, and a line graph by a line.

Tree graphs illustrate ratios between *parent* data and their *children*, between children and their children, and so on down to the lowest level. The ratio appears to the right of the line that connects parent to child. A tree that is wider than the screen will be divided among several pages. The number of the page on which each portion of the graph is continued appears within the parent's box, at its right edge. All graphs are printed in landscape orientation.

Documents are a special type of report whose printout is sent to customers, vendors or other external recipients (e.g., customer invoices). A standard format is provided for all documents, which can be revised by using the **Design Tool**, discussed in detail under **Basic Customization**, p. 116.

On BI reports and charts, see p. 104.

Running a New Report

Once you have selected the desired report from a menu, a window pops up in which you have to choose between Saved and New reports.

To run a new report, make sure that the **New** option is selected (this is the default). Then select the report format. To confirm your choice, click **OK** or press **Enter.**

A parameter input screen will pop up. After you have finished specifying all required information in that window and all execution steps have been completed, the report will be generated (see p. 81 for a simple example of parameter input; see p. 106 for a complete explanation of the topic).

Note: At any point during the process of execution and parameter input, you can choose to cancel generation of the report.

Accessing a Saved Report

Once a report is run from the menu, it is saved in the database (until it is deleted by the user or system manager). In order to view or send report data (as e-mail attachment or to Word), select the report in question from the menu and click the **Saved** box.

Depending on how the system is set up, you may be able to view only your own saved reports, those of all users in your user group or those of all users in the system. Ask your system manager to change the **SAVEDREPORTS** system constant if you lack access to all the saved reports you need.

If any saved reports are available (see **Figure 53**), the dates on which they were run will appear in a list, together with the name of the user who ran it, and the query conditions used to generate it.

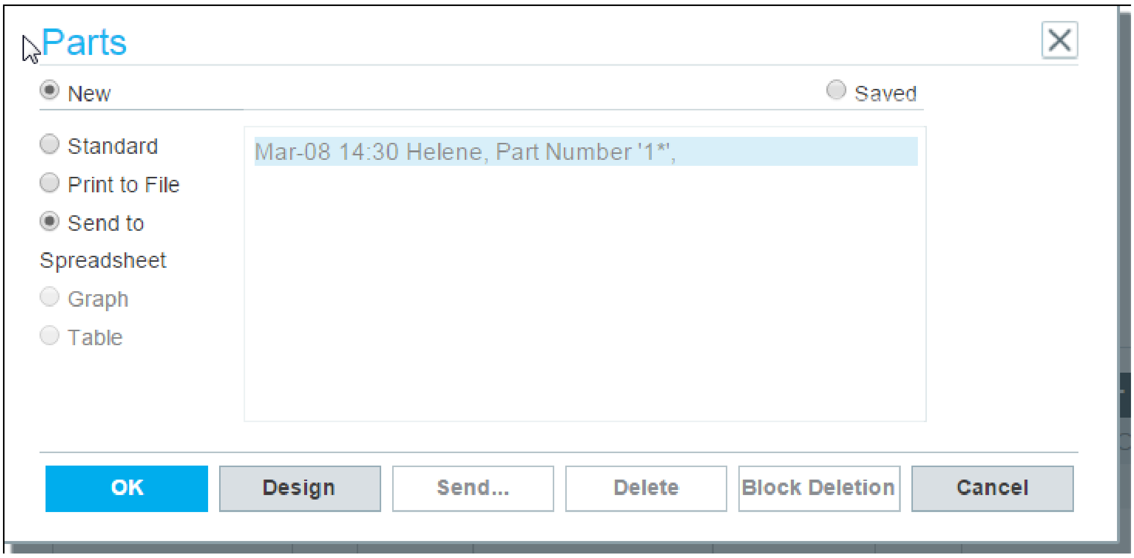


Figure 53: Report pop-up window — saved report

Select the report you want from that list, using the left mouse button or the ↑↓ arrows. Then choose between viewing the report on screen (**Display**), displaying it as an MS-Word file (**Display in MS-Word**) or creating an e-mail attachment (**Send…**). You can also **Delete** a report from this screen.

Viewing the Report on Screen

If you have run a new report or chosen to display a saved one, an HTML page will pop up with the prepared report. You can then use regular web options.

In addition, you can:

- freeze titles at the top of the page as you scroll through the data of a report (click on the button at the top of the report; click again to undo).
- click to export report data to Excel.

  Note: The report data will be exported to Excel regardless of the value of the **SPREADSHEET** system constant.
- click to export report data to Word.
- click to export report data to Outlook.
- click to send report data as an e-mail attachment via your ***Priority*** mailbox.
- (for a tabular report) view the data as a bar graph (click on the button at the top of the report, click **Back** to return to the report).
- use Explorer-style icons (**-** and **+**) to collapse the report (or specific sections of it) to display subtotals and totals, and re-expand it to full view.
- access system forms from the page by clicking on items in the report (e.g., clicking a part number activates the ***Part Catalogue*** form).

Note: To view graphs, the **CHARTTYPE** system constant must be correctly defined by the system manager.

Sending a New Report to a Spreadsheet

To export a report to Excel:

1. Make sure the **SPREADSHEET** system constant is set to 1.
2. Run a new report and select **Send to Spreadsheet** (see **Figure 53**).
3. Select the desired template in the dialogue box. To create a regular spreadsheet document, select **No Template**.

4. Fill in the columns in the input screens that open and click **OK**. A new spreadsheet will open in Excel, which you can now edit and print out.

To export a report to other spreadsheet applications:

1. Make sure the **SPREADSHEET** system constant is set to 0.
2. Run a new report and select **Send to Spreadsheet** (see **Figure 53**).
3. Select the desired template in the dialogue box. To create a regular spreadsheet document, select **No Template**.
4. Fill in the columns in the input screens that open and click **OK**. A file is downloaded and displayed at the bottom of your browser window.
5. Click the file to open it in your default spreadsheet application. You can now edit the spreadsheet and print it out.

Notes:

- Templates created using the .xlt file type will appear in the list of templates, but will not be accessible when the **SPREADSHEET** constant is set to 0.
- You can only send a new report (not a saved one) to a spreadsheet.

Using the Print/Send Options

There are several print/send options to choose from when working with reports (see Figure 54). You can:

- send the entire report or selected pages to your printer.
- send the report as an e-mail attachment.
- open and save the report in Word.
- print the report to a text file.
- include attachments that have been linked to the record in question when printing or sending a report (e.g., as **Mail**).
  Note: To exclude a specific attachment, flag the **Don't Send** column in the original form.
- send the report directly to a pre-defined printer (**Quick Print**), specifying the desired number of copies.
  Note: Flagging this option when printing a report sends the report to the default printer.
- save the report as a PDF file and display it in Adobe Reader.
- save the report as a PDF file and send it as a fax or e-mail attachment.

Note: The various send options are only available if you have the necessary hardware and software setup for e-mail and/or fax dialing.

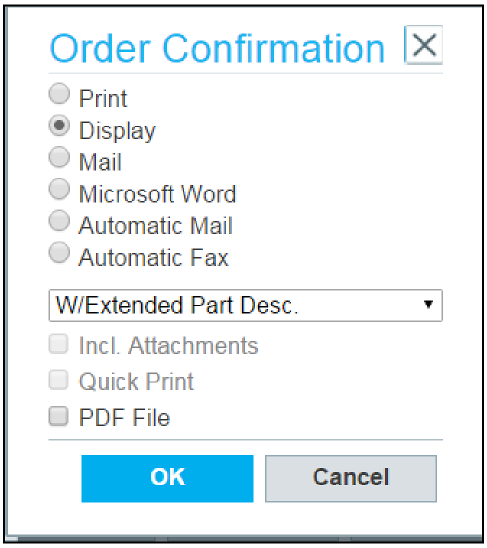


Figure 54: Print/Send Options for Reports

Most of the above options are available only when you are accessing a saved report. Note the following exception:

- You can print a new report to an external directory, but only as a text file. Such reports are not recorded in ***Priority***.

Additional options are available when creating a new document (i.e., a type of report whose printout is usually sent to customers or vendors).

- **Print:** Prints the document without displaying it.
- **Display:** Opens the document in ***Priority***.
- **Mail:** Opens an e-mail message in the ***Compose Mail*** form with the document as an attachment.
- **Automatic Mail:** Sends an e-mail to the designated contact with the document as an attachment (without opening the ***Compose Mail*** form).
- **Automatic Fax:** Faxes the document to the designated contact (without opening the ***Compose Mail*** form).

Sending an E-mail Attachment

You can also send a saved report as an attachment to an e-mail message.

Select the report from the dialogue box and click the **Send…** button.

A new e-mail message will be created with the report title as the topic and the report file as the attachment. In fact, the ***Compose Mail*** form will open up automatically. All you need to do is specify the recipient and send the message. (For detailed instructions on using the system's mail feature, see p. 163).

BI Reports and Charts

BI (business intelligence) reports are different than all the above-mentioned reports, in that they allow you to analyze data from multiple perspectives. You determine the exact cross-section of data to be displayed by drilling down within categories and accessing only the specific data that you want to see. For example, you can see how a particular part is selling, cross-referenced by the type of sale and broken down by the country in which it was sold. Once you have achieved the desired display of data, you can export the report to Word, Excel or Outlook, send it as an e-mail attachment from the ***Priority*** mailbox, or save it as an HTML page. For details, see the **Executive Reports Wizard**.

There are several methods of accessing BI reports:

- Enter the **Executive Reports** module and select the menu for the desired analysis (e.g., **Sales Order Analysis**, **Service Call Analysis**).
- Enter the desired analysis menu from within its system module (e.g., ***Purchase Orders → Purchase Order Analysis***).
- Any form column with ◔ next to its title (e.g., customer number, order number, part number) indicates that there are related BI reports that can be run for retrieved data. Click on the icon; a list of relevant BI reports appears, which you can run to display data related to the value of the column.
- Click the **Options Menu** button, click **Run** and select the **Analysis Reports (BI)** item, which also displays the same list (i.e., of BI reports relevant to the highlighted column).

Note: To view up-to-date information in an BI report, you need to run a preparatory program (e.g., ***Prepare All for Analysis (BI)***) that collects the data and prepares it for presentation. This program is usually run automatically each night by the Tabula Task Scheduler.

Defining Periods for BI Reports

Once you have run one of the BI reports, specify the period and company for which to display data. You can specify either an absolute period (e.g., the first quarter of 2015) or the range of dates when the period begins and ends (e.g., from the start of this quarter to the end of this month).

To define the periods and companies for which to display data, do **one** of the following:

- To specify an absolute period, click the icon. In the appropriate columns, select the **Year** (e.g., 2010) and the **Period in Year** (e.g., November) for which to display data.
- To specify a range of dates, click the icon. You can then choose from a list of relative **Start** and **End Date**s (e.g., start of last month, end of this quarter) or click to open a pop-up calendar from which to choose the exact **Start** and/or **End Date**.

You can also select a **Level of Detail** for the report. For example, you can run a report for a whole year displaying data for each quarter; in this case, the **Level of Detail** would be Quarterly.

Notes:

- If you are working in a multi-company environment, you can also select the company for which to display data when defining the period for the report.
- Once you have set up a template of periods and/or companies, you can save it if desired (by clicking on one of the numbered buttons in the **Save Template** section).
- Whatever values are currently chosen become the default the next time the report is run. To change them, click the appropriate icon and either redefine manually or reuse a saved definition by clicking on the appropriate number in the **Get Template** section.

Drilling Down Within BI Reports

Begin by selecting the desired Dimensions format (click the icon). The One-dimensional format displays each level of data by itself. That is, once you select a dimension by which to slice the data in a given screen, the selected cross-section is displayed alone. You can then continue to drill down within the data until you reach the cross-section that you want. In order to view data for the previous level, you need to return to the previous screen (e.g., by clicking the back arrow).

In contrast, the Multi-dimensional format enables you to drill down and view different cross-sections of the data in a single screen, organized within a hierarchical tree. When drilling down within the data, each cross-section is sliced by the selected dimension. The corresponding node in the tree is expanded accordingly (and can later be collapsed). This enables you to view values for the entire population as well as zoom in on specific cross-sections without losing global context.

After selecting the desired Dimensions format, you can begin selecting the cross-section of data to be displayed by clicking **All**. For example, in ***Sales Opportunity Analysis (BI)***, the input screen that appears lets you choose to break down the data by customer number, part number and territory. If you are working in One-dimensional format, this input screen also contains **Filter by** and **Filter Except for** options that allow you to view or eliminate all data that match a designated pattern (specified in the **Use Pattern** column). Alternatively, you can choose to total all data in the defined cross-section, by choosing the **Total by** or **Total Except for** options.

For example, to eliminate data for customers whose customer number begins with the letter **T**, select **Customer Number** to break down data by customer, choose the **Filter Except for** option and record the value "T*" in the **Use Pattern** column (see **Figure 55**).

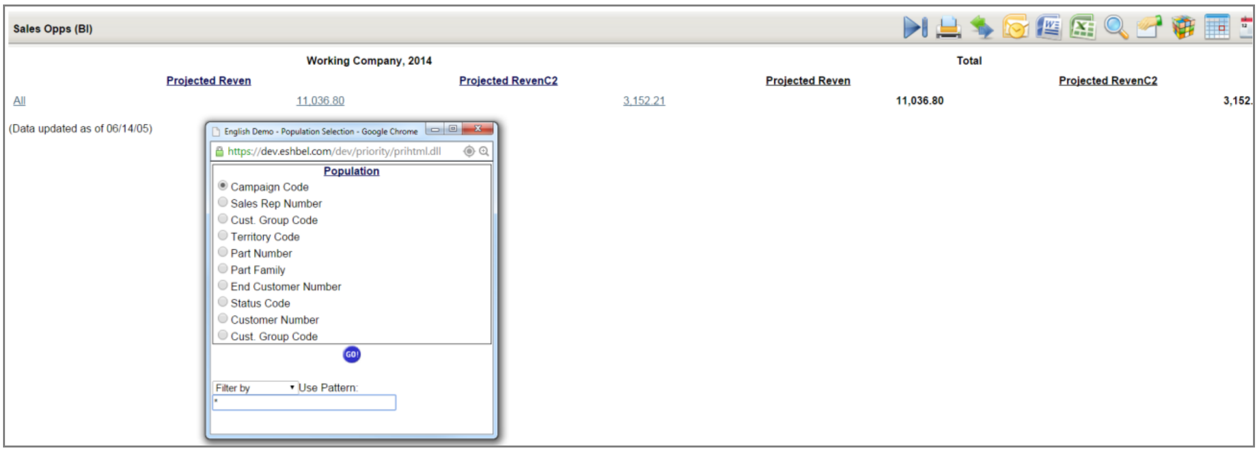


Figure 55: Options for BI reports

You can also use any of a number of interactive tools and icons to refine the report until you achieve the desired level of detail (e.g., the type of data to display) or to export the BI data to an external program such as MS-Excel; for details, see the **Executive Reports Wizard**.

Dashboards

Dashboards display pertinent data in various cross-sections, including reports, tables, graphs, gauges and pies, and even allow access to relevant BI reports.

Note: In order to ensure that dashboards display up-to-date information, you need to run a preparatory BI program (e.g., ***Prepare All for Analysis (BI)***) that collects the data and prepares it for presentation. This program is usually run automatically each night by the Tabula Task Scheduler.

Multi-colored control lamps and gauges in Dashboards are used to indicate profitability and sales target compliance. Users can specify the range of values that define the red, yellow and green areas in each control lamp or gauge in the ***Definition of Gauge Scales*** form.

Each dashboard is comprised of a number of mini-windows called web parts, which can be arranged for your convenience using a built-in design tool. External web sites can also be displayed in these windows, provided the sites have been properly defined in ***Priority*** (usually by the system manager).

To design your dashboards:

1. Click the icon that appears in the upper-right corner of each mini-window. This will open the **Dashboard Design** window, which displays the arrangement of windows appearing in the dashboard alongside a list of hidden windows.

2. To include additional web parts displaying selected web sites, open the **Additional Sites** Choose list (**Figure 56**), select a site. The title of the web site will appear in the table of displayed windows in the top part of the screen. (To include web sites in this list, see below.)

3. To include additional web parts in your personalized **My Dashboard**, select the desired web part from the **Additional Web Parts** Choose list. This list displays all available web parts for which you have the necessary privileges. The selected web part will appear in the top part of the screen.

4. To remove any web part from the dashboard, drag its title to the list of hidden windows on the left.

5. To apply the changes you've made to the dashboard design, click **GO**.

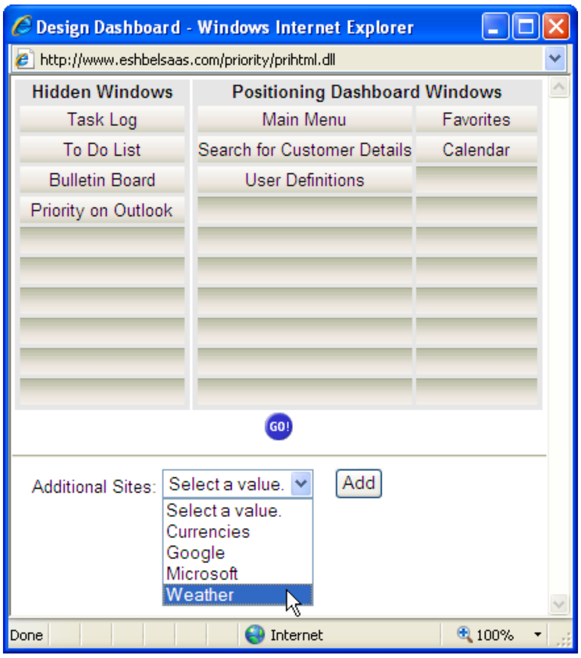
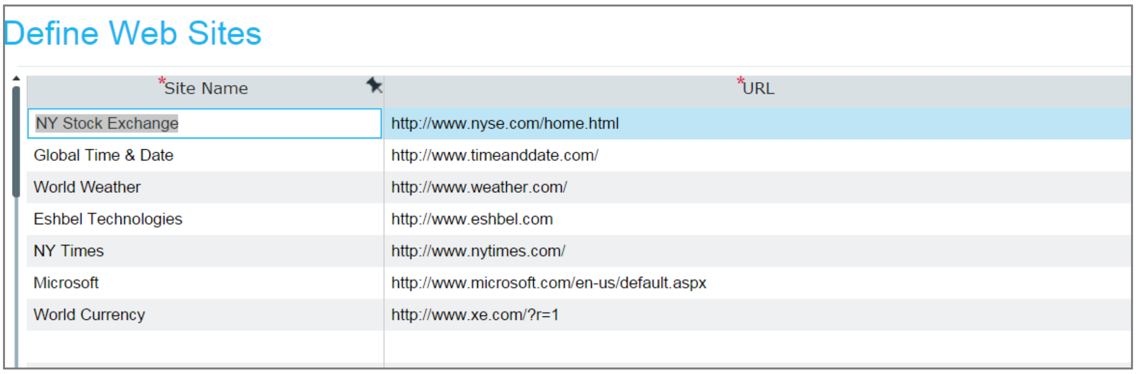


Figure 56: Including external sites

To define web site addresses for display in dashboards:

1. Enter the ***Define Web Sites*** form in the ***Priority on Outlook*** menu (in the ***Office Management*** module).

2. Record a name for the site (as you want it to appear in the Choose list), and in the **URL** column, record the full Internet address (see **Figure 57**).



Define Web Sites

*Site Name	*URL
NY Stock Exchange	http://www.nyse.com/home.html
Global Time & Date	http://www.timeanddate.com/
World Weather	http://www.weather.com/
Eshbel Technologies	http://www.eshbel.com
NY Times	http://www.nytimes.com/
Microsoft	http://www.microsoft.com/en-us/default.aspx
World Currency	http://www.xe.com/?r=1

Figure 57: Defining web site addresses

The following are tips for using dashboards:

- To enlarge one of the windows, click the  icon in the upper right corner.

- To determine the date range for which reports are run, click the  icon.

- In order to move from the upper to the lower part of the screen, use the vertical navigation bar to the right.
- To change the type of graph displayed, click the  icon.

Note: In order to use the Graph Type icon, your system manager must make sure that the **CHARTTYPE** system constant is set to 5.

Parameter Input

Most programs and reports require user input. Among other things, this input determines the records that will be affected by the program or the records that will be displayed in the report.

User input is designated via the pop-up parameter input screen (**Figure 58**), which is comprised of one or more columns, some of which have both right-hand and left-hand input windows. The right-hand window is for inputting values; the left-hand one is for selecting operators (where relevant).

Use the mouse, **Tab** key or ↑↓ arrow keys to move between input columns. Do not press **Enter** until you have finished specifying all input.

When an input screen opens, it displays the parameters that were used the last time the program was run. If you are not interested in using these parameters, click the **Clear** button and enter new ones.

Parameters must be designated in at least one column in each input screen. This is why the first input field in each screen features the default "*" wildcard (see **Figure 58**), despite the fact that an empty input field achieves the same effect (i.e., inputs all records).

The exception to this rule is an input field that requires a single value (e.g., **From Date**, **To Date**), in which case input is mandatory and blank fields are invalid (see **Figure 59**).

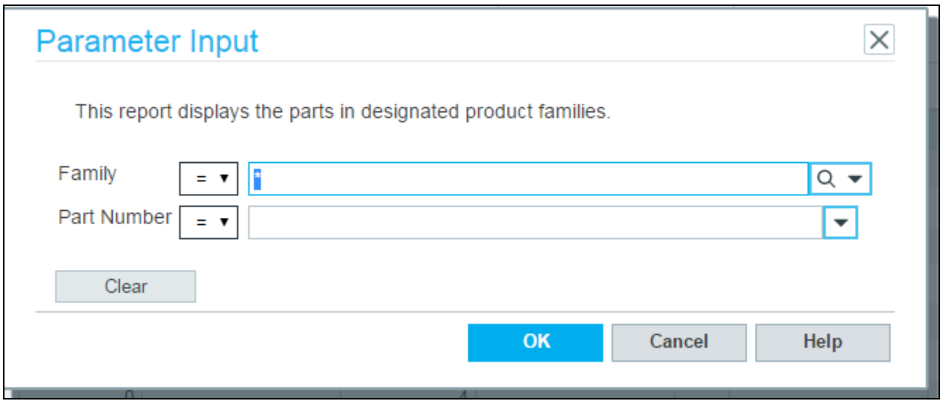


Figure 58: Standard input screen with wildcard

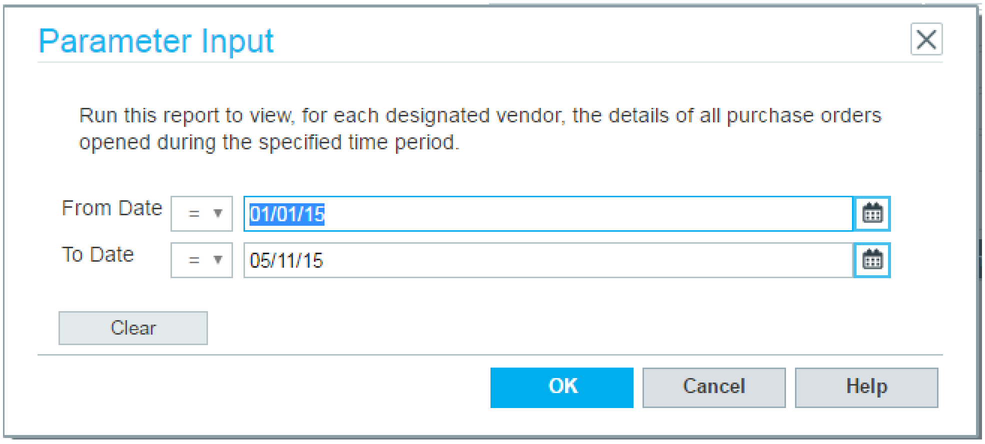


Figure 59: A single-value input screen

If you are not sure how to fill in a certain column, put your cursor in the input window next to the column in question and do **one** of the following:

- Click the **Help** button at the bottom of the screen.
- Press **F1**.

You will notice that the columns in the parameter input screen are like columns in forms:

- Some have an arrow that opens a Choose or Search list (see pp. 32-35). Input values can be taken from this list.
- The left-hand input window has an arrow that opens up a selection of operators.
- Date columns have a pop-up calendar  (see p. 41), from which a date can be selected.

- Columns from which you can access a target form (so as to select records) display the  button.

Note: Clicking the calendar icon (or pressing either **F6** or the **Space** bar) opens a list of relative dates (e.g., yesterday, next month). Right-click the calendar or press **Shift+F6** to open the standard pop-up calendar.

Now confirm your choice by clicking **OK** or pressing **Enter**. Sometimes a second input screen will appear. In that case, input the second round of parameters and confirm your choice.

Note: The next time you run the program or report, the screen will display whatever the input was for the previous run.

To illustrate how this works, we will practice the procedure when running the ***Daily Exchange Rates*** report. Note that, if no exchange rates have yet been recorded, the report will be empty of values. As you are merely practicing parameter input, this is unimportant. It is recommended, however, that you **delete** the values you have input (use the **Backspace** key) or **cancel** parameter input (click on the **Cancel** button) after each trial, before beginning again.

Note: If you accidentally click **OK** or press **Enter**, you will not do any harm. You will just have to wait for the system to attempt to produce the report and notify you that there are no values.

Use the **Search for Entity** feature (p. 11) to find and run the ***Daily Exchange Rates*** report. The parameter input screen that pops up requires you to specify the currency (or currencies) to be included in the report, as well as the range of dates that are covered. We will concentrate on the **Curr** input column, in which the currency code is designated.

Specifying an Exact Value

The simplest way to input data is to provide an exact value. So, if you want to run the report for Euros, select **EUR** from the Choose list that opens from the right-hand input window of the **Curr** column (see **Figure 60**). To run it for Pounds Sterling, select **GBP** from the list. You would consequently obtain a report of all exchange rates for the Euro (or Pounds Sterling) over the range of dates specified.

The problem with the above method is that it only allows you to run the report for a single currency. A more useful method is to designate a pattern, using wildcards or operators.

Note: In some cases, such as the **From Date** and **To Date** columns, only a single value is permitted.

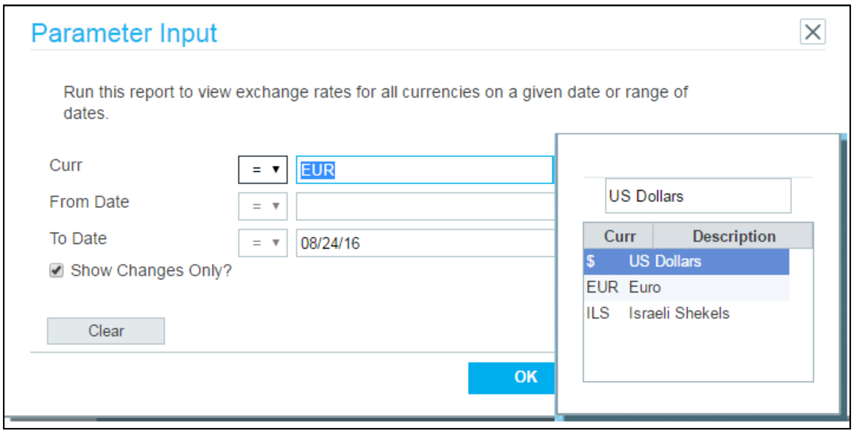


Figure 60: Inputting a single currency for the *Daily Exchange Rates* report

Designating a Pattern

One way to input several records at once is to specify query conditions. You can include any of the wildcards or operators used to retrieve records in a form (see p. 152).

Examples:

- To run the ***Daily Exchange Rates*** report for all currencies, leave the * in the right-hand input window of the **Curr** column (this appears by default).
- To input all currencies whose code begins with the letter “F”, type: **F***.
- To input all currencies whose code begins with “C” and ends in “P”, type: **C*P**.

Operators are generally more useful in a column displaying a date or number. You will notice that the left input window has an arrow. To change the default equal sign (**=**) to another operator (such as **<**, **<=**, **>**, **>=**, **<>**, **-**), click on the arrow and select the desired symbol.

Note: The operator button is disabled in any column in which a single input value is required (e.g., the **From Date** and **To Date** columns in this report).

You can select multiple values for a given input column, either as discrete values (the **|** operator) or as a range of values (the **-** operator):

- OR: Click on the arrow next to the left input window and select the vertical bar (**|**). The input column in question is duplicated. Input the desired values, one in each input column. When the report is run, data meeting either criterion is displayed.
- BETWEEN: Click on the arrow next to the left input window and select the hyphen (**-**). The input column in question is duplicated. Input the first value in the range in the left input column and the last value in the range in the right input column (see **Figure 61**). When the report is run, only data that falls within the designated range of values is displayed.

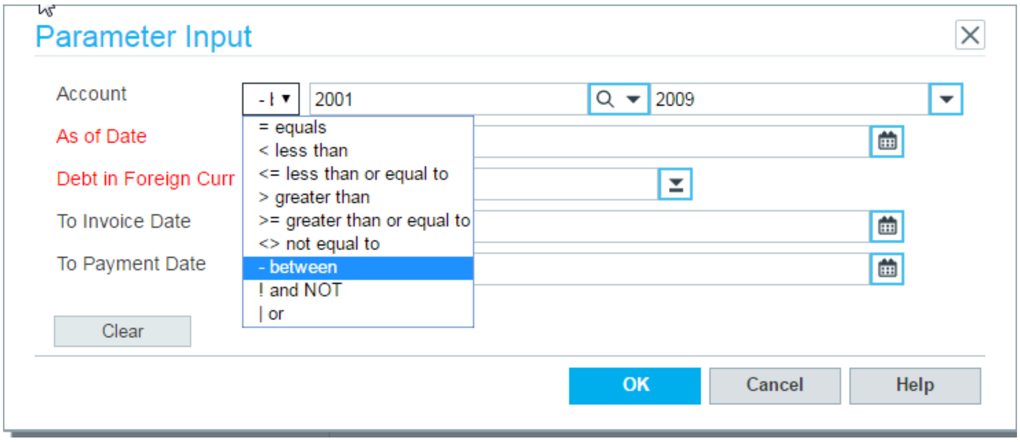


Figure 61: "Between" operator

You can also input all records that match a given criterion, while *excluding* those that match a second criterion, by selecting the **!** operator. Consequently, the input column in question is duplicated (see **Figure 62**), enabling you to specify the criterion for inclusion in the left input column (e.g., ***2****) and the criterion for exclusion in the right input column (e.g., ***21****). In the example provided, the result will be all records that begin with the number "2", except for those beginning with the numbers "21".

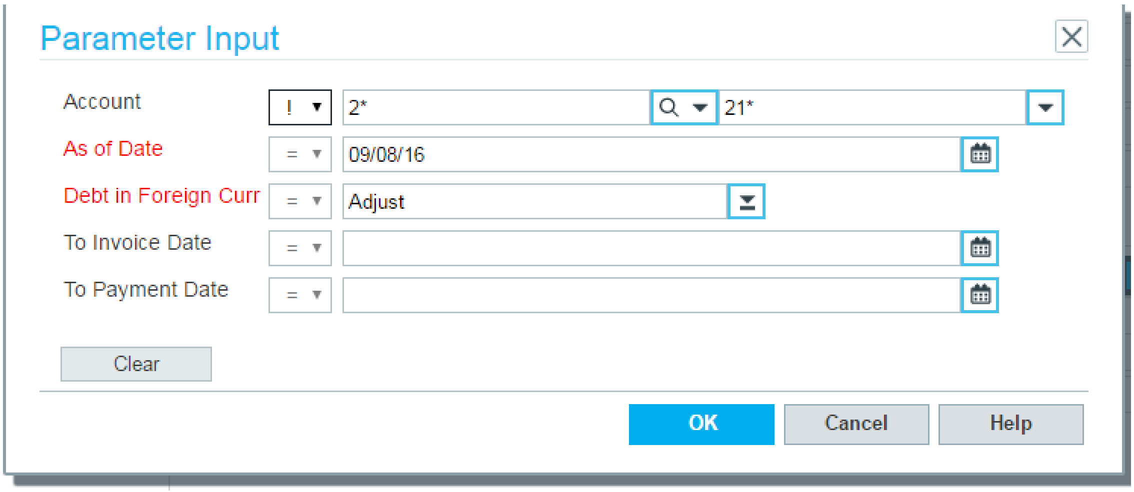


Figure 62: "And NOT" operator

Inputting a Batch of Values

Suppose you want to run the report for a group of currencies that cannot be easily represented by a pattern (e.g. Euros, Pounds Sterling and Yen). In this case, you need to select the records in question from a target form.

To access a target form in a Choose list, do **one** of the following:

- Place the cursor in the input column (**Curr**) and press **F6** twice.
- Open the Choose list (by clicking on the arrow) and then press **F6** from within the list.

To access a target form from a Search list, do **one** of the following:

- Place the cursor in the input column and press **F6** twice.
- Open the Search list (by clicking on the arrow) and then click **Advanced Search** (or **F6**) from within the list.

Note: Clicking the **Select Values**  icon (that appears next to some input columns) also accesses a target form. In certain input screens, this is the only method available (i.e., there is no Choose or Search list).

The target form (***Currencies***, in this case), opens in Query mode so that you can easily retrieve the currencies you wish to appear in the report. You can "Hide" any unwanted records that appear by pressing **F7** on the line of every unwanted currency.

Once all desired records appear in the form, click the arrow next to the **Choose Value** button and choose **Select All**; or press **Esc**. In the **Back to Input** window that opens, click **OK**. You will return to the parameter input screen. Any records displayed in the form at the time it was exited will be considered part of the input batch. A red magnifying glass will appear next to the **Curr** input column, indicating that the data have been input in this manner. However, the column itself will remain blank, as it is impossible to display all the records that have been input.

Note that you can also use the target form to find and input a single value into the program when you are not sure of the value, as demonstrated in the example below.

Example:

Suppose you want to print an Order Confirmation for a customer but you are not sure of the order number.

1. In the **Order Confirmation** report, click the icon next to the **Order** column. The **Sales Order** form opens in Query mode.
2. Record the **Customer No.** and press **Enter**. All sales orders for this customer will be retrieved.
3. Scroll down (e.g., use the vertical scrollbar) until you find the line with the order you are looking for.
4. Without leaving the line, click **Choose Value** (or press **F8**). In the **Back to Input** window that opens, click **OK**. You will then return to the parameter input screen and the order in question will be inserted in the **Order** column with the symbol next to it.

Help for Programs and Reports

Most input screens include a Help window that gives a general explanation of the program or report being run. In addition, the **Help** button at the bottom of the input dialogue box displays an explanation of the input parameter that is selected or in which the cursor is placed (see **Figure 63**).

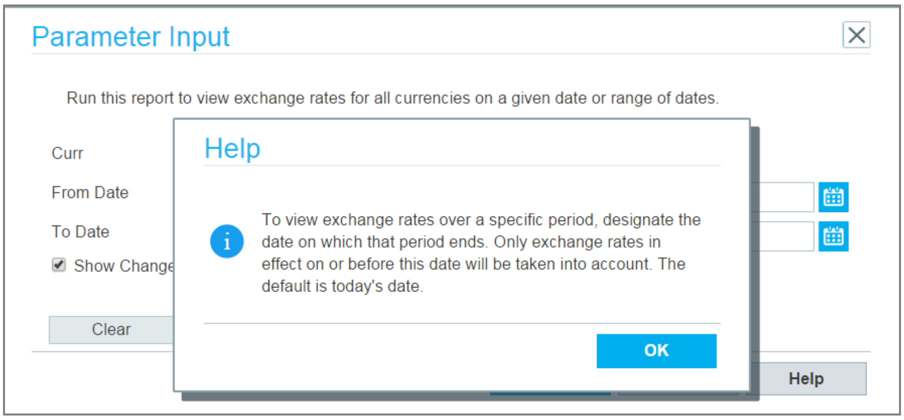


Figure 63: Help for a report during parameter input

Basic Customization

Customizing the Menu

As mentioned previously, the system provides a number of tools for personalizing the appearance of the menu screen.

Organizing Menus

Authorized users can use the **Design Tool** (**Figure 64**) to customize the actual content of the menu and it sub-levels (as well as forms and reports) by hiding unnecessary items and rearranging the rest into the most convenient order.

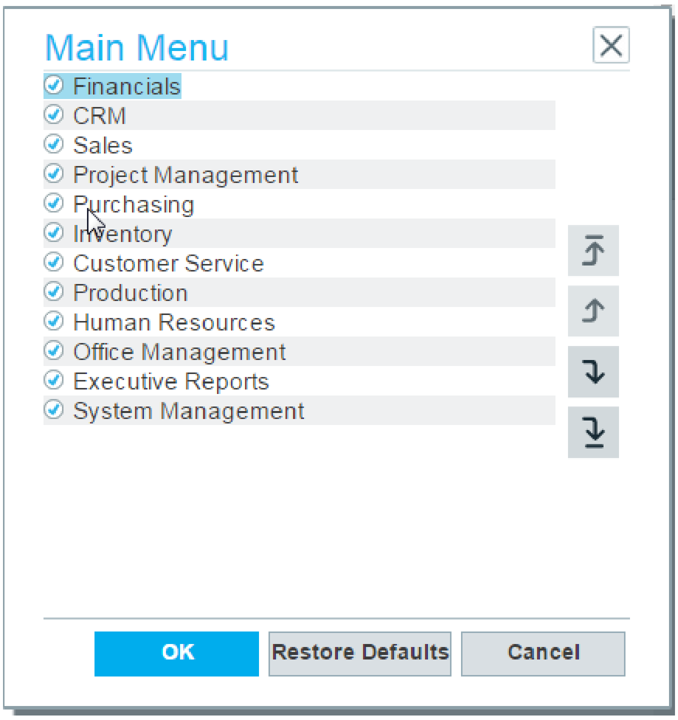


Figure 64: The Design Tool for the Main Menu

Notes:

- To customize the menu, your user record must be flagged in the **Form and Menu Design** column (in the **Permissions** tab of the ***User Permissions*** form).

- All menu customizations take effect in all companies in the system. While they do not affect other system users, your system manager can run a program that copies menu customizations from one user to another.

The first step in redesigning the menu is deciding which sub-menus you will actually need in each module, and the order in which you would like them to appear.

To access the Design Tool, move to the menu in question and do **one** of the following:

- To design one of the menus in the Main Menu (e.g., Financials, CRM), click the **Options Menu** button, click **Design** and select **Design Main Menu**.
- Otherwise, right-click the sub-menu in question and select **Design Menu**.

Use the Design Tool to make any of the following changes:

- Move a menu item up or down in the list (by clicking the up and down arrows or by dragging an item to the desired place within the list).
- Hide an item from the menu display.

Each of the above customizations is reversible; furthermore, you can restore any menu to its original format by clicking the **Restore Defaults** button at the bottom of the Design Tool screen.

Example:

If you work mainly with multi-shipment invoices (rather than sales invoices or over-the-counter invoices), you may decide to hide some of the items in the ***Customer Invoices*** menu. To do so:

1. Open the ***Financials*** menu, its sub-menu, ***Accounts Receivable***, and the next sub-menu, ***Customer Invoices***.
2. Right-click the ***Customer Invoices*** menu and select **Design Menu**. A window will open with a list of the items in the menu.
3. Right-click the ***Sales Invoices*** item, and select **Hide**.
4. Do the same for all other menu items you wish to hide.
5. Click **OK**. You will immediately see the newly designed menu.
6. To restore the menu to its original form, reenter the Design Tool and press the **Restore Defaults** button. Then click **OK**.

Add Items to Menus

Two more design tools allow the system manager (or anyone with Manager privileges) to include additional entities in ***Priority*** menus:

- **Add Document File**: The system manager can attach any documents (such as MS-Office files) or image files to a menu.
- **Add User-Defined Report**: The system manager can attach any customized report created in a user report generator to a menu.

To access the above options, right-click the menu in question.

Customizing Forms

Each form provides three different Design Tools – one for form columns and tabs, one for sub-level forms, and one for direct activations. All three can be accessed both in the **Design** menu, accessed from the **Options Menu** button, or right-clicking any form column and selecting **Design**.

Notes:

- To customize forms, your user record must be flagged in the **Form and Menu Design** column (in the **Permissions** tab of the ***User Permissions*** form).
- All form customizations take effect in all companies in the system. While they do not affect other system users, your system manager can run a program that copies form customizations from one user to another.

If the form in question is currently open in Multi-Record Display Mode, the Organize Fields Design Tool simply displays the full list of form columns in order of their appearance. In Full-Record Display Mode, the Design Tool displays the list of form tabs, each of which opens to display its constituent columns (see **Figure 65**).

In this mode, you can make extensive changes to the appearance of the form, such as:

- Hiding or renaming individual form columns
- Renaming tabs and rearranging their columns
- Moving columns from one tab to another
- Changing the order of tabs, and
- Creating a new tab and populating it with columns taken from other tabs.

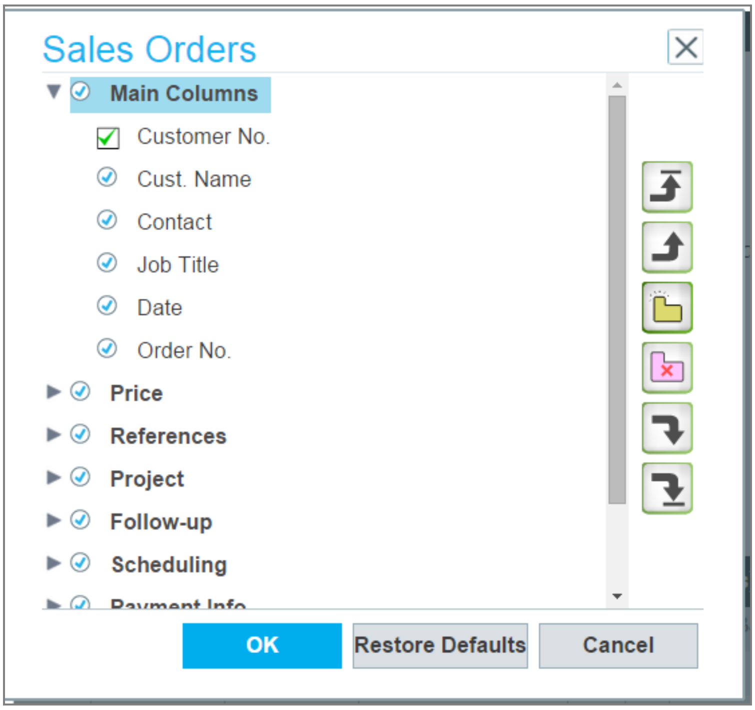


Figure 65: The Design Tool for a form in Full-Record Display Mode

Example:

To create a custom tab in a sales order that helps you track your sales reps at a glance:

1. Enter the ***Sales Orders*** form.

2. Press **Ctrl+B** OR right-click any form column, select **Design** and then select **Organize Fields**.

3. Click the  icon to the right of the screen. A new tab will appear at the bottom of the list, called **New Tab**. Use the up arrow to move it up to the second position in the list (i.e., the first tab to appear after the form's main columns).

4. Click the arrow next to the **References** tab. Right-click the **Sales Rep** column at the bottom of the tab and click the **Move to…** command. Select **New Tab**. Repeat this process for the **Type of Sale** column.
   Note: An arrow next to a column title indicates that the column is merged with another column; such pairs behave as a single column.

5. Press **OK**. The system will automatically refresh your screen, and the form will now display the new tab.

6. To return the form to its original appearance, open the Design Tool and click the **Restore Defaults** button.

As previously mentioned, the **Organize Fields** Design Tool displays all the form columns in a single list when the form is open in Multi-Record Display Mode. Similarly, the **Organize Direct Activations** and **Organize Sub-levels** Design Tools display the form's activations and sub-levels in order of their appearance. Use these tools to rename or hide the columns, entities and sub-levels that you do not need and arrange the rest in the desired order.

Notes:

- Changes made to the titles of columns in one display mode remain in effect in the other display mode as well.
- Wizards and online help (**F1**) refer to tab and column titles as they appear in the original form designs. Changing these titles may make it difficult to recognize columns and tabs referred to in Help tools.

System Manager Design Options

Your ***Priority*** system manager (or anyone with Manager status) can use several advanced design tools to revise forms for all system users:

- **Add Columns to Form:** This program allows the manager to add new columns to a form from the database table upon which the form is based. A complementary program deletes any added columns.
- **Convert to Multi-Company Form:** This program allows the manager to convert almost all system forms into multi-company forms, in which the user can display data from multiple companies in a single form. A complementary program converts such forms back to single-company forms.
  Tips:
- Alternatively, the manager can right-click the form title in the menu and select **Convert to Multi-company**.
- See p. 21 for instructions on how to work with multi-company forms.
- **Change Form Title:** This program changes the title of the form, in both display modes, as well as in any other system tools (e.g., Choose lists) in which the form is named.

These tools can be found in the ***Advanced Form Design*** menu at the following path: ***System Management → System Maintenance → Advanced Design***.

Customizing Reports

To design a report, right-click its title in the menu, then select **Design Report** from the pop-up menu.

Notes:

- To customize reports and documents, your user record must be flagged in the **Document Design** column (in the **Permissions** tab of the ***User Permissions*** form).
- Report customizations affect all users in all companies in the system.

Most reports consist of a single section composed of the relevant columns. This format is designated **Basic** in the Design Tool, to distinguish it from any variations you may choose to create (see **Figure 66**). Click the arrow next to the format to view the report sections (in this case, the only section, which bears the report title). Click the arrow next to the section title to view its component columns.

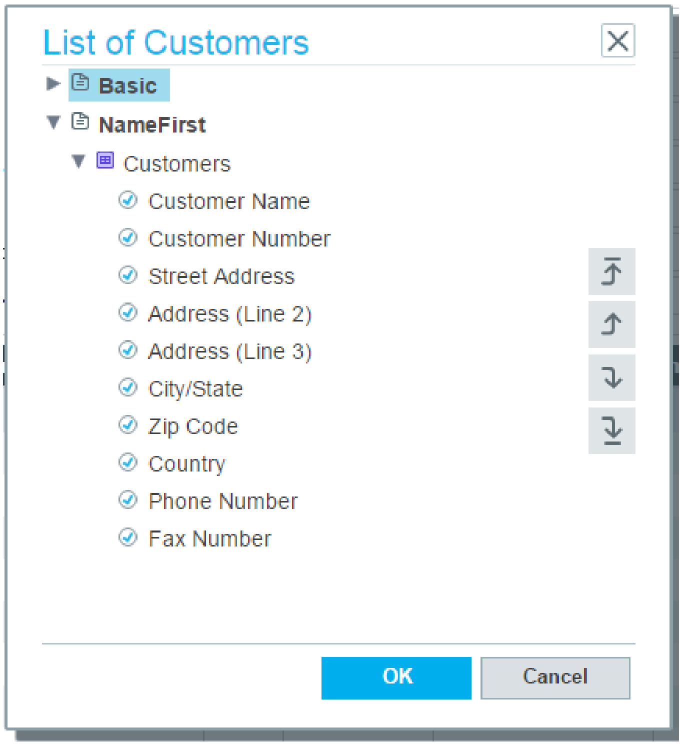


Figure 66: The Design Tool for the *List of Customers* report

As with the **Organize Fields** Design Tool, you can hide and rearrange the various report components and their columns, and rename column names. In addition, you can revise the appearance of report fields and their titles, and create variations of a report by duplicating and revising it.

When customizing a report, it is good practice to duplicate the report and perform your design changes on the duplicate.

Example 1:

1. Navigate the menus to access the ***List of Customers*** report.
   Tip: Follow the path ***CRM → Customers → Customer Reports***.

2. Right-click the report title and select **Design Report**.

3. Right-click the format title **(Basic)** and select **Duplicate**.

4. A new report format will appear below the original, titled **Copy of Basic**. Rename the format **NameFirst**.

5. Click the arrow next to **NameFirst** and then the arrow next to **Customers** to display the report columns. Select **Customer Name** and click the second up arrow to the right of the screen.

6. Click **OK**. The new report format displays the same data as the **Basic** format, except that in the new format the customer name precedes the customer number.

7. Run a new ***List of Customers*** report. The report dialogue box now provides two formats in which to run the report: **Basic** and **NameFirst**.

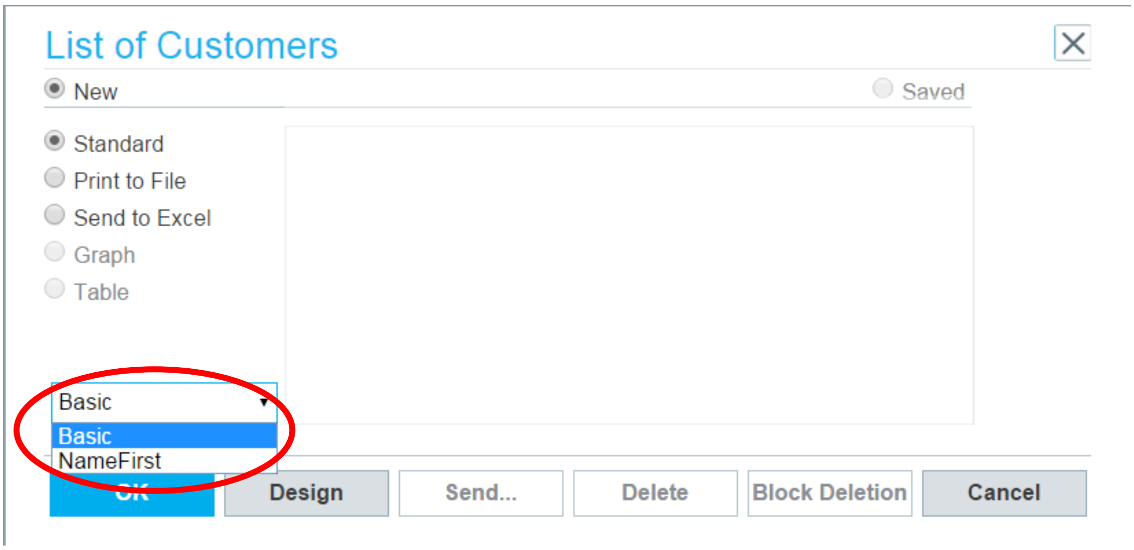


Figure 67: Selecting formats in the report dialogue box

8. To remove the new format, open the Design Tool, right-click the format title and select **Delete**.

Duplicating the original report may prevent you from having to reconstruct the original design, if it is needed at some later date.

Example 2:

To revise the appearance of report columns and titles:

1. Right-click the ***List of Customers*** report and select **Design Report**.

2. Click the arrows next to the duplicate format title (**NameFirst**) and report title (**Customers**) to display the report columns.

3. Right-click the **Customer No.** column and select **Field Attributes**. Use the **Display Attributes** dialogue box to change the field's font, font style, font size, color, background color or alignment in the space assigned to the field. Click **OK**.
   Tip: In a field that displays a number, such as **Quantity**, you can also set the number of decimal places to display.

4. Right-click the column again and select **Title Attributes**. Make any of the changes listed above to the **Customer No.** column's display title. Click **OK**.

5. Run a new ***List of Customers*** report and select the **Display** option to see the field's new appearance.

6. To undo all changes to the report's appearance, right-click the format name (**NameFirst**) and select **Restore Defaults**.

Document Design

Documents are reports that are sent outside the company to customers or vendors (e.g., printouts of price quotes, sales orders, invoices).

Most documents are predefined in a variety of formats, each of which comprises a different set of document components. Some components are pre-designed in a fixed style, and you cannot rearrange their columns. Those components without a fixed style appear as tables, and their columns can be rearranged. As we have seen, simple reports usually consist of only one table component, and share the same design options as tabular components in documents.

Note: If you are working in a multi-language environment, documents and reports must be designed separately in each language.

Types of Components

Most documents can be printed in a variety of formats, such as: **Standard Format**, **Detailed Format** and **W/Extended Part Desc.** (see **Figure 68**).

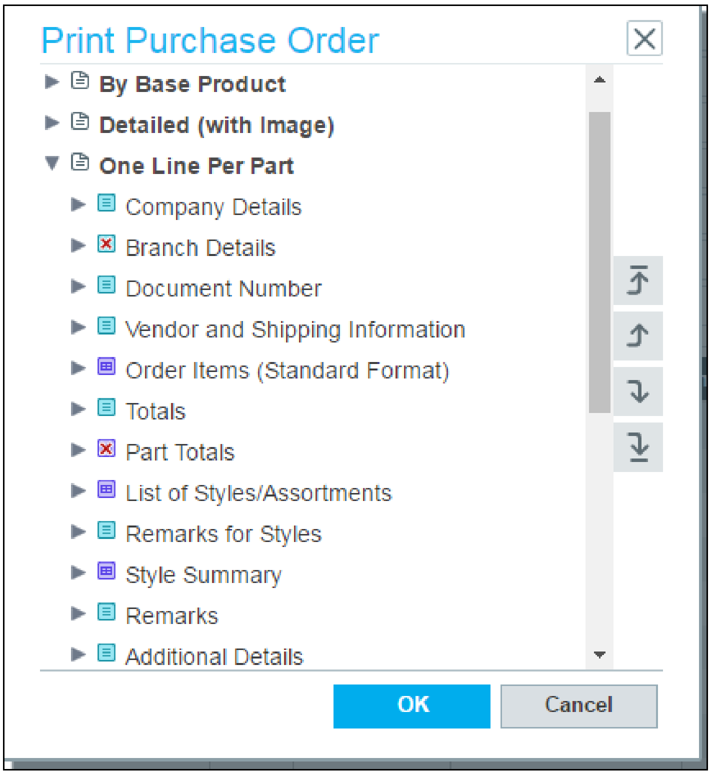


Figure 68: The Design Tool for purchase order printouts

Each print format comprises a number of discrete document components (e.g., **Company Details**, **Vendor and Shipping Information**, **Items**, **Totals**), which are either *fixed* (pre-designed) or *tabular*. You may revise either type of component, or create your own print format by duplicating an existing one, changing its name, and then revising its components.

Note: Users choose the desired print format in the dialogue box that opens (after input is complete) when they run the report (see **Figure 69**).

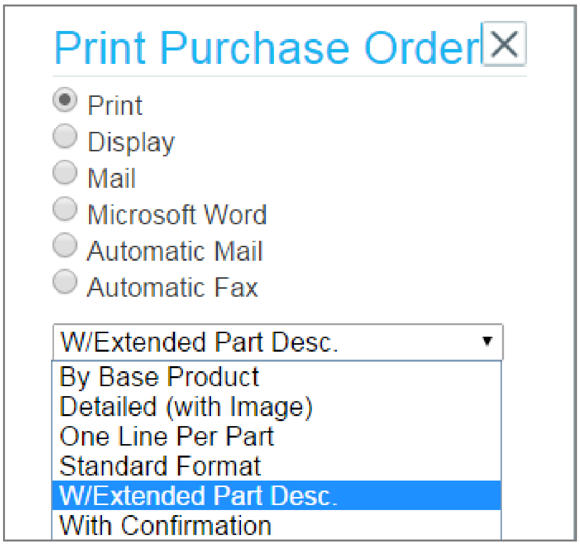


Figure 69: Select the print format for purchase orders

Symbols preceding the title of each document component or report field in the Design Tool help you to distinguish between types of components and their attributes. A red **X** on the icon indicates that the component or field is hidden:

Fixed Components (**Figure 70**)

You can hide columns, rename columns, change the style of columns and their titles (e.g., font, font style, background color, coloring negative numbers), but you cannot change their order (the up and down arrows to the right of the screen are deactivated).

In particular, you can change the general document title that precedes the document number (e.g., from "Purchase Order" to "Special Purchase Order") in the **Document Number** component.

Tabular Components (**Figure 71**)

In addition to the options listed above, you can also change the order of columns.

Note: To hide entire document components, whether fixed or tabular, right-click the component title and select **Hide**.

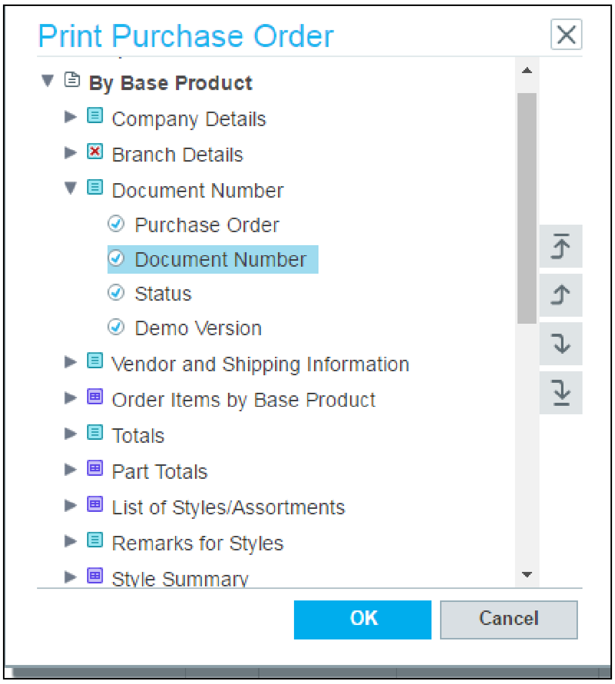


Figure 70: Columns in a fixed document component

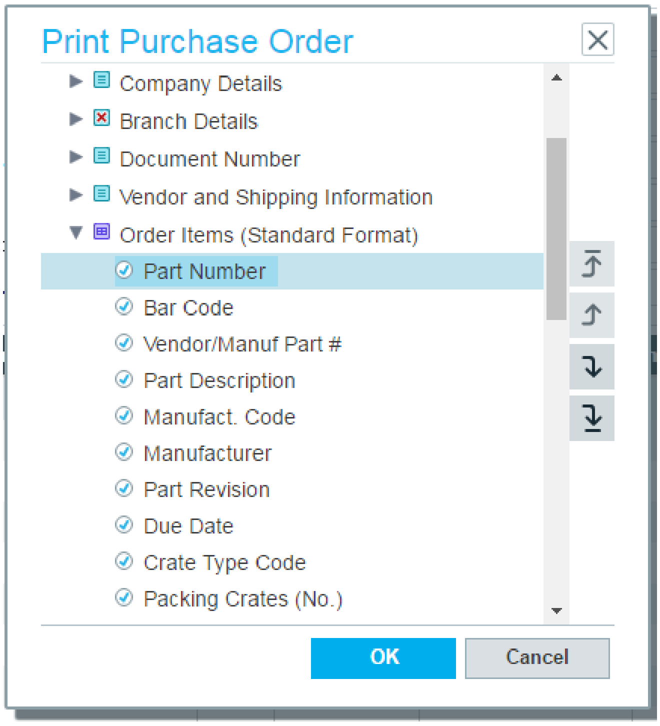


Figure 71: Columns in a tabular component

Defining Your User Signature

To customize the user signature that appears in printouts of documents that you create, select the **User Signature** command from the **File** menu (via the **Options Menu** button). A parameter input screen pops up in which to choose between a signature for documents or text forms. Choose the **in Documents** option.

A second parameter input screen appears, in which you can indicate which elements you want to display and compose a personal greeting (see **Figure 72**).

User information (e.g., **Position**, **E-mail**) is taken from your personnel file. Your **Name** is taken from the **Full Name** column of the ***Users*** form.

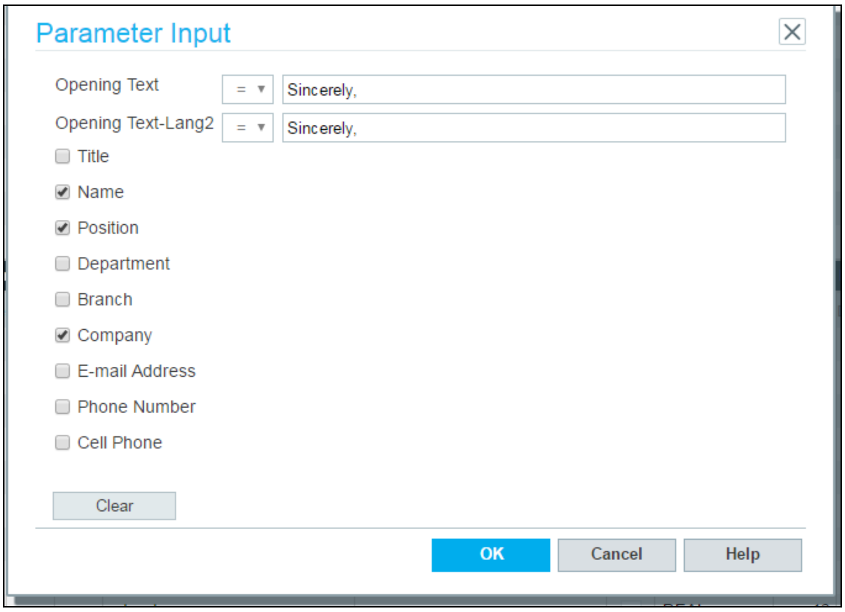


Figure 72: Defining the user signature

Advanced Topics

Generators

In addition to the Query Generator (see p. 57), the system provides additional generators that facilitate more advanced processes, such as:

- creating messages that are displayed/sent when certain conditions are met
- changing the value of designated columns when certain conditions are met
- creating a Word document from system data
- creating a spreadsheet from system data
- creating labels from system data
- creating a formatted letter from system data.

The **Business Rules Generator** and **Data Generator** share the same intuitive interface as the Query Generator. The **Spreadsheet Report Generator** operates within the spreadsheet environment, while the **Word Document Generator** operates within the Microsoft Office environment. All generators are accessed from the **Design** menu (in the **Options Menu**), except for the **Letter Generator**, which is accessed at the following path: ***CRM → Customer Relations Management***.

Note: You must have Microsoft Office 2010 or higher installed in order to use the Word Document Generator.

The Business Rules Generator

The Business Rules Generator (see **Figure 73**) allows you to define any of the following messages:

- an error message, which prevents you from completing the attempted action based on defined conditions
- a warning, which alerts you to potential consequences that may result from the completed action
- an e-mail, which can be accompanied by an attached printout of the current record and sent to a given user, group, e-mail address or contact
- a text message, which can be sent to any user, group, mobile phone number or contact

- a task, which can be accompanied by an attached printout of the current record and assigned to any user.

Notes:

You can only send automatic e-mails to groups to which you have authorized access (in the ***Groups*** form). Defined in the ***Groups*** form, groups may contain both system users and external e-mail recipients. See p. 87.

Whoever is flagged in the **Write Business Rules for All** column in the **Permissions** tab of the ***User Permissions*** form is permitted to define rules that apply to all users.

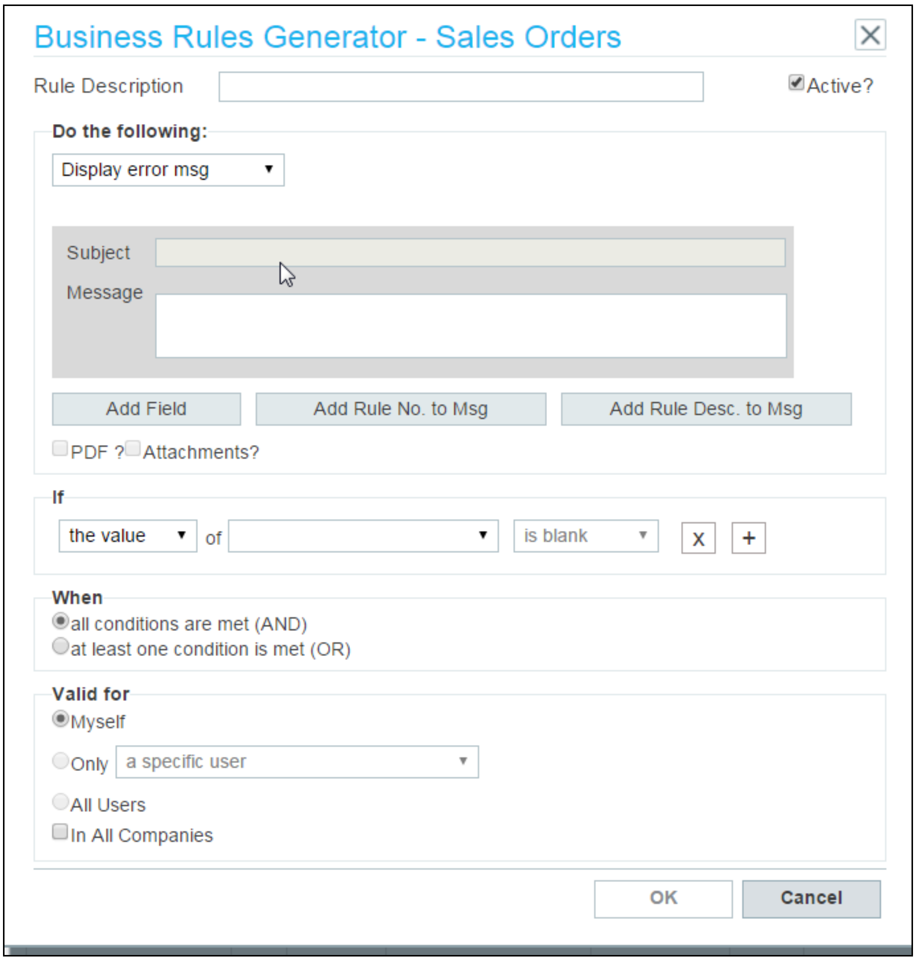


Figure 73: The Business Rules Generator

The following options are available for defining business rules:

- Beneath the message area, click **Add Field** to open a Choose list containing the list of all column titles in the open form. You can use this list to add a field representing the column's current value into the text message.

- Use the **Add Rule No. to Msg** and **Add Rule Desc. to Msg** buttons to add the automatically assigned rule number and the description you recorded to the text message.

- Add a document's attachments to the e-mail sent for the document by flagging **Incl. Attachments.**

- Use the **If** section to define the condition (or conditions) that will cause the message to be displayed or sent (e.g., when a certain column receives a specific value or range of values, or the result of a designated expression).

- In the bottom **When** section you can determine that all conditions must occur at the same time (the AND condition) in order to trigger the message, or you can use independent conditions (the OR condition) where it is enough for only one of the conditions to occur in order to trigger the message.

- The **Valid For** section determines whose actions will trigger the message:

  - **Myself:** If you are a normal user with standard privileges, leave this setting to create messages that work for you alone.

  - **Only:** If you are a privilege group leader, use this setting to create alerts for all users in your group (or for a single privilege group member). If you are the system manager, use this setting to create messages for members of any given group.

  - **All Users:** If you are the system manager, have Manager privileges or are authorized to **Write Business Rules** (in the **Permissions** tab of the ***User Permissions*** form), use this setting to create messages that work for every user in the system.

Note: If you want to condition the message on columns within a sub-level form, you must be in the sub-level form before you open the Business Rules Generator (columns in the upper-level form remain available as well).

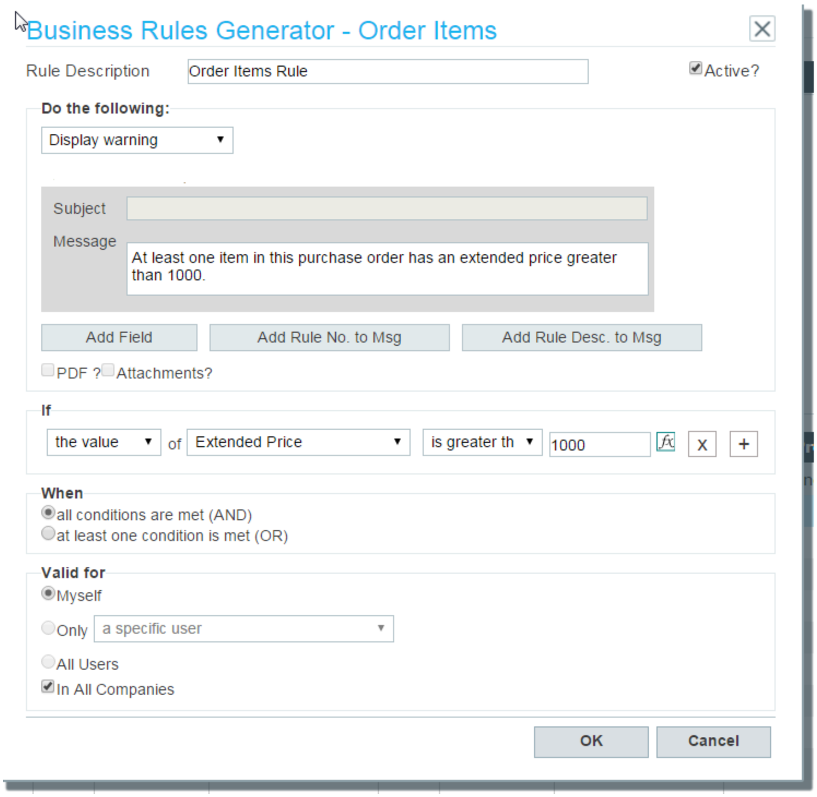


Figure 74: Displaying a warning when an ordered item is too expensive

In the first example, we'll practice defining a warning message.

Example 1:

1. Enter the ***Purchase Orders*** form, retrieve an order, and enter its sub-level ***Order Items***.
2. Click the **Options Menu** button, click **Design** and select **Business Rules Generator**.
3. In the **Rule Description** column, type "Order Items Rule".
4. In the **Do the following** section, select **Display warning**.
5. Record the following text in the message area: "At least one item in this purchase order has an extended price greater than 1000".
6. In the **If** section, open the Choose list in the second text box and select the **Extended Price** column title.
   Tip: Type "E" to jump to the first column beginning with E.
7. Open the Choose list in the third text box and select **is greater than**. In the additional text box that appears, type "1000".

8. Flag the **In All Companies** option to make the current message effective in all companies in the system.

9. Click **OK** to leave the Business Rules Generator.

10. To see the warning message, open a purchase order that includes an item whose extended price is higher than 1000.

In the second example, we'll practice setting up an automatic e-mail. This particular message will be sent automatically to the purchase manager whenever the due date of a purchase order is postponed.

Example 2:

1. From the ***Purchase Orders*** form, enter the ***Order Items*** sub-level form and reopen the Business Rules Generator. Before the generator opens, you will see a dialogue box that displays all of the rules defined for the current form (in your case, the message created in Example 1). Click **New** to create a new rule.

2. In the **Do the following** section, leave **Send e-mail**. Select **user** in the second text box, and your own username in the third text box. **Note:** For the purpose of testing your message, we will pretend you are the purchase manager.

3. Type the following in the **Subject** text box: "Purchase Order ". Click **Add Field** and select the **Purchase Orders – Order** column title.

4. Type the following partial sentence in the message area: "Regarding Purchase Order ". Click **Add Field** and select the **Purchase Orders – Order** column title from the Choose list below the text box. Now type a comma and continue "the due date of order item", then click **Add Field** and select the **Part Number** column title. Finally, type "has been moved to", click **Add Field** and select the **Due Date** column title. End the sentence with a period (see **Figure 75**).

5. In the first line of the **If** section, open the Choose list in the second text box and select the **Due Date** column title. Open the Choose list in the third text box and select **increases**.
Note: "Increasing" the due date means that the previous date is replaced with a later one.

6. To avoid triggering this message the first time you record a due date, click the + (plus) sign to open a second line of the **If** section and create a new condition: Choose **the previous value** in the first text box, **Due Date** in the second box, and **is not blank** in the third.

7. For the rule to operate according to all the defined conditions, in the **When** section make sure "all conditions are met (AND)" is selected.

8. Click **OK** to leave the Business Rules Generator.

9. To test the e-mail message, return to the ***Purchase Orders*** form and open an order that contains at least one line item (or retrieve an existing order). Enter one of the lines and replace the due date with a later date. When you see the “Sending automatic e-mail” message, enter your inbox to see the e-mail you sent.

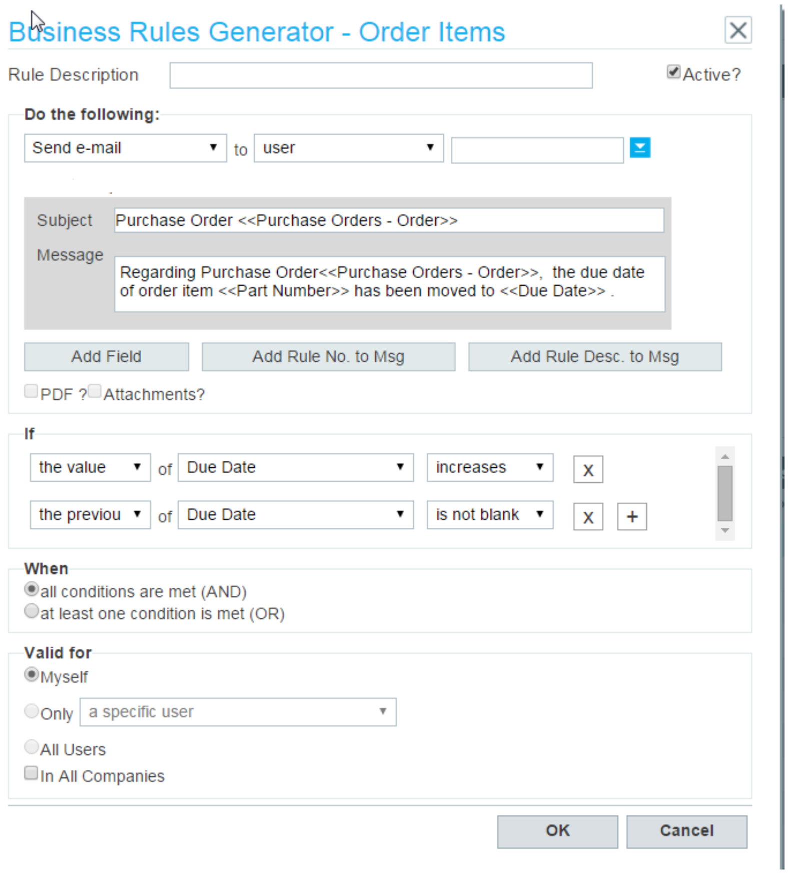


Figure 75: Sending an e-mail when the order due date is postponed

In the third example, we'll practice defining an error message that is activated when the value of one of the form columns (**Start Date**) exceeds a value that is determined by a function expression (as opposed to a fixed value).

Example 3:

1. From the ***Sales Orders*** form, open the Business Rules Generator.
2. At the top, select **Display error message**.
3. Record the following text in the message area: "The designated Start Date is too late. Record a date within the current week."
4. In the **If** section, open the Choose list in the second text box and select the **Start Date** column title.
   Tip: Type "S" to jump to the first column beginning with S.
5. Open the Choose list in the third text box and select **is greater than**. Place the cursor in the additional text box that appears and click the function () button that appears to the right of the box.
6. In the dialog box that opens, click **Add Predefined Expression**. Select the **start of next week** expression. The corresponding expression appears in the text box in this dialog box (see **Figure 76**). In the same text box, type " - 24:00" (indicating one day prior to the beginning of the next week). Click **OK** to exit the dialog box. The function expression you defined now appears in the fourth text box in the **If** section.
7. Click **OK** to leave the Business Rules Generator.
8. To **see** the error message, open a sales order with a **Start Date** that falls a week from today.

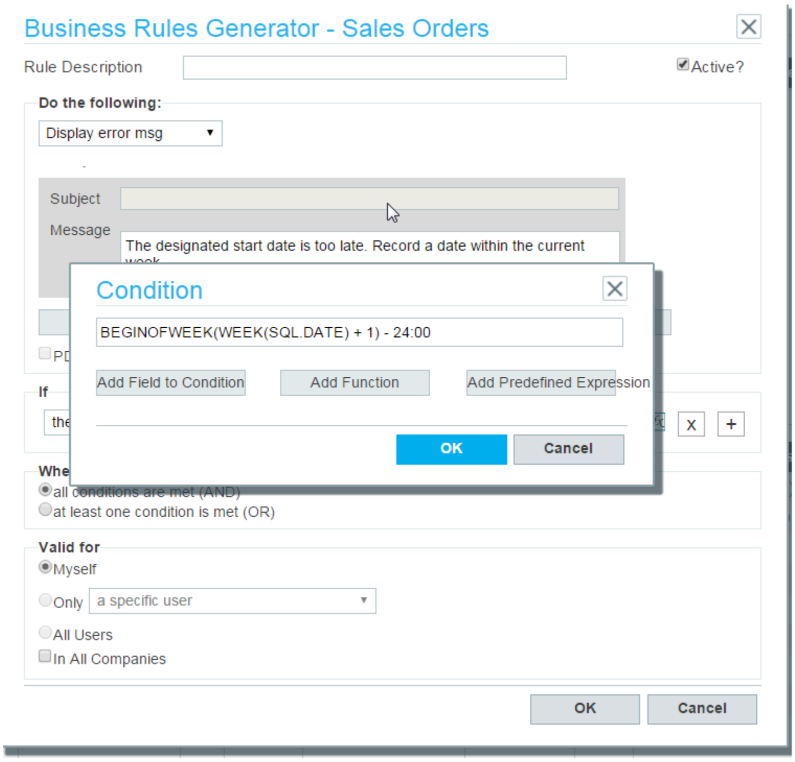


Figure 76: The Business Rules Generator (illustration of the current example)

Finding and Organizing Rules

In the rules dialogue box (which appears after the first rule has been defined), you can view all rules defined for the form (see **Figure 77**).

- To search for a specific rule, click the **More** button and select **Search**. This allows you to do a text search within the list of rules (e.g., search by the rule description). Alternatively, select **Report** to print a report of the rules defined for the form. The report includes the **Rule Number** and **Rule Description** as well as other identifying information useful for finding the rule you want.

- To change the order of the listed rules, use the up and down arrows on the left (e.g., put the most important ones at the top for easy access).

- If you do not want a certain rule to operate, remove the checkmark from the **Active** column, or click **Delete** to completely remove it.

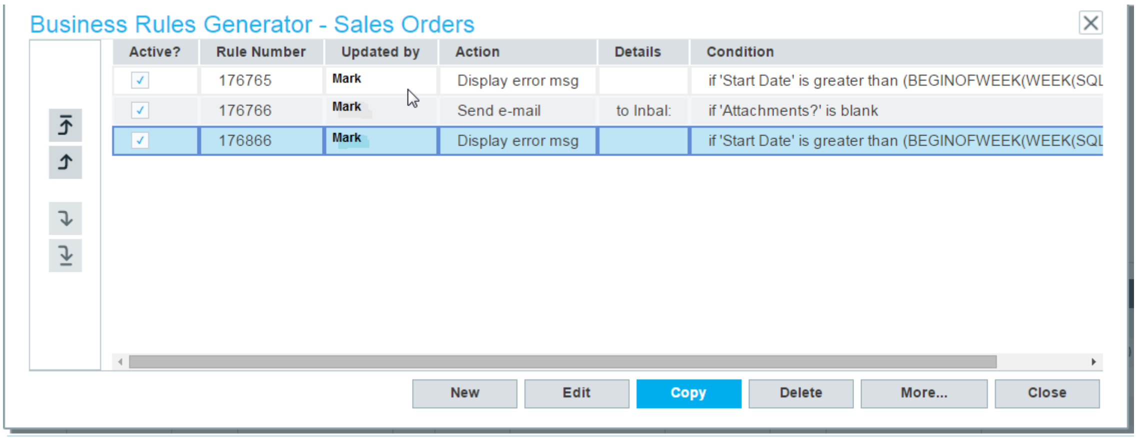


Figure 77: Business Rules Generator dialogue box

Creating New Rules from Existing Ones

An easy way to create a new rule is to copy an existing one and revise it. Simply select the desired rule in the dialogue box (see **Figure 77**) and click **Copy**. A duplicate of the selected rule will appear, which you can revise by clicking the **Edit** button.

The Data Generator

The Data Generator functions in a similar manner to the Business Rules Generator; however, instead of displaying or sending a message, the system records a designated value in a particular form column after a specific field is updated.

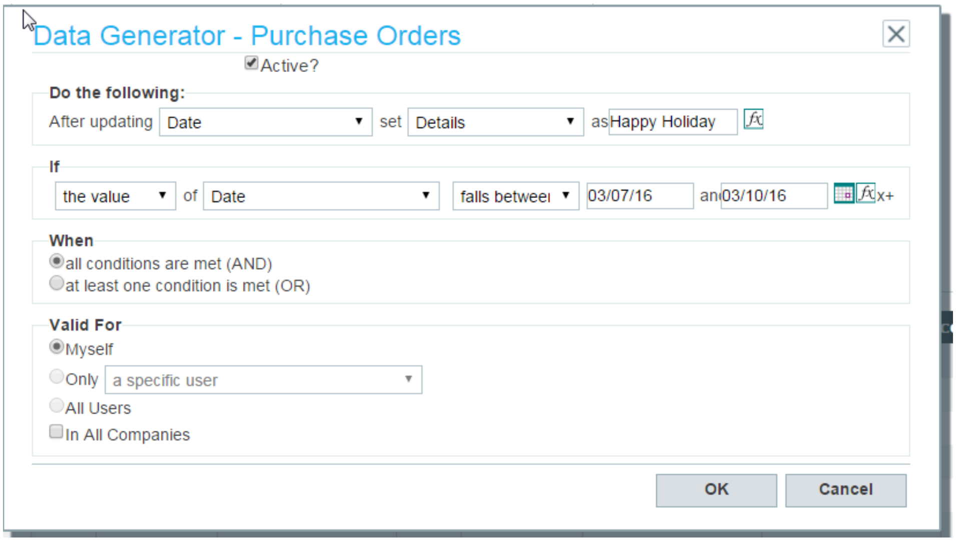


Figure 78: The Data Generator

In the first example, we'll practice updating a form column only if the specified field is updated in the designated way.

Example:

1. From the ***Purchase Orders*** form, open the Data Generator (see **Figure 78**). That is, click the **Options Menu** button, click **Design** and select **Data Generator**.
2. Select the **Date** column title in the **After updating** text box, and **Details** in the **set** text box. In the **as** text box, record the words "Happy Holiday!".
3. In the first line of the **If** section, open the Choose list in the second text box and select the **Date** column title.
4. Open the Choose list in the third text box and select **falls between**. In the two additional boxes that appears, right-click each calendar and select any two dates.
5. Click **OK** to create the rule and exit the Data Generator.
6. To test the new data, open a purchase order and change its date to fall within the defined range. When you leave the **Date** column, the **Details** column (in the **Reference** tab) will be filled in automatically with the chosen expression.

In the second example, we'll practice updating a form column using a function expression rather than a fixed value.

Example 2:

1. From the ***Sales Orders*** form, retrieve an order, enter the ***Order Items*** sub-level form and open the Data Generator.
2. Select **Part Number** in the **After updating** text box, and **Due Date** in the **Set** text box. Place the cursor in the **as** text box and click the function () button that appears to the right of the box.
3. In the dialog box that opens, click **Add Predefined Expression**. Select the **today** expression to add the current date (without the time) to the function expression. This expression appears in the text box in this dialog box. In the same text box, type " + 5 * 24:00" (indicating five days after the current date). Click **OK** to exit the dialog box. The function expression you defined now appears in the **as** text box (see **Figure 79**).
4. Click **OK** to create the rule and exit the Data Generator.

5. To test the new data, open a sales order and add a new item to the order. When you leave the **Part Number** column, the **Due Date** column will be filled in automatically with the date that falls in five days from now.

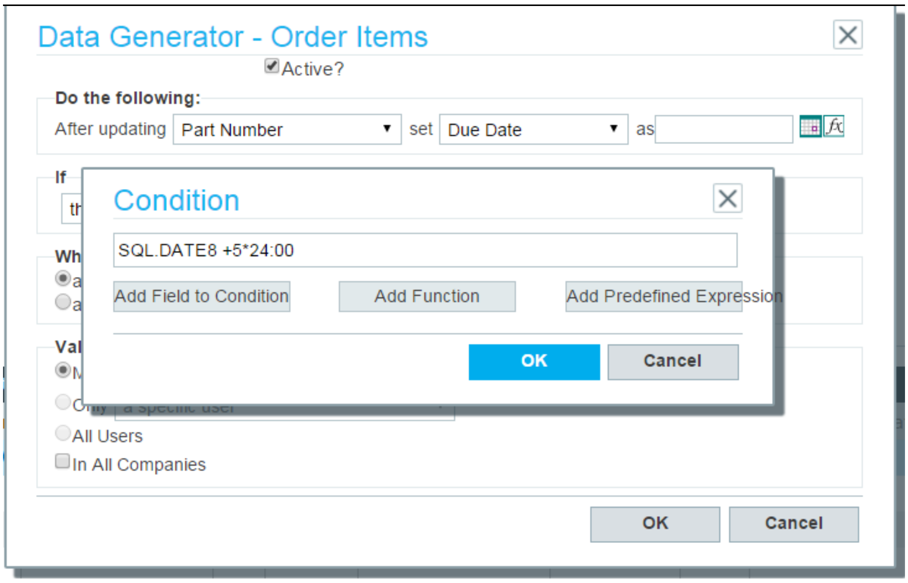


Figure 79: The Data Generator (illustration of the current example)

Notes:

- In the **When** section you can determine that all conditions must occur at the same time (the AND condition) in order to trigger the message, or you can use independent conditions (the OR condition) where it is enough for only one of the conditions to occur in order to trigger the message.
- The same rules and limitations that apply to the **Valid For** section of the Business Rules Generator apply to this generator as well.
- In the Data Generator dialogue box you can view all rules defined for the current form. To search for a specific rule click the **More**… button and select **Search**. To print a report of the rules defined for the form, select **Report**. You can change the order of the rules by clicking the arrows on the left. If you don't want a certain rule to be activated, remove the checkmark from the **Active** column or click **Delete** to remove it completely.
- An easy way to create a new rule is to copy an existing rule and revise it. To do so, select an existing rule and click **Copy**. A copy of the rule appears in the list, which you can then revise by clicking **Edit**.

The Word Document Generator

The Word Document Generator allows you to produce an infinite variety of form-based documents that display only those data fields you want to appear, exported to a Word file from the system via XML tags.

Each XML tag represents a column from a specific ***Priority*** form. When such a tag is implanted in a Word template, it can receive whatever value is currently stored in that column. For example, the **Document** column tag will receive the document number of the form record whose data are sent to the template.

In order to use XML templates, you must have Microsoft Office 2010 or higher installed at your workstation, and you must be authorized for document design (in the **Permissions** tab of the ***User Permissions*** form).

Note: Office 2010 requires a special add-in, which may be downloaded from http://xmlmapping.codeplex.com/.

There are two aspects involved in generating Word documents from system data: creating Word templates and sending a specific form record to the template to generate a document.

To create a Word template:

1. Open the ***Priority*** form whose data you want to export. For our example, we will use the ***Price Quotations for Customers*** form.

2. Click the **Options Menu** button, click **Design** and select **Word Document Generator**.

3. Record a name for the template in the **New Template** dialogue box (see **Figure 80**).
   Note: After the first template has been created for this form, the **Design Templates** dialogue box opens, in which you can choose between editing an existing template for the current report, deleting it or adding a new one.

4. Click **New**. The template file is downloaded.

5. Click the file to open it in Word.

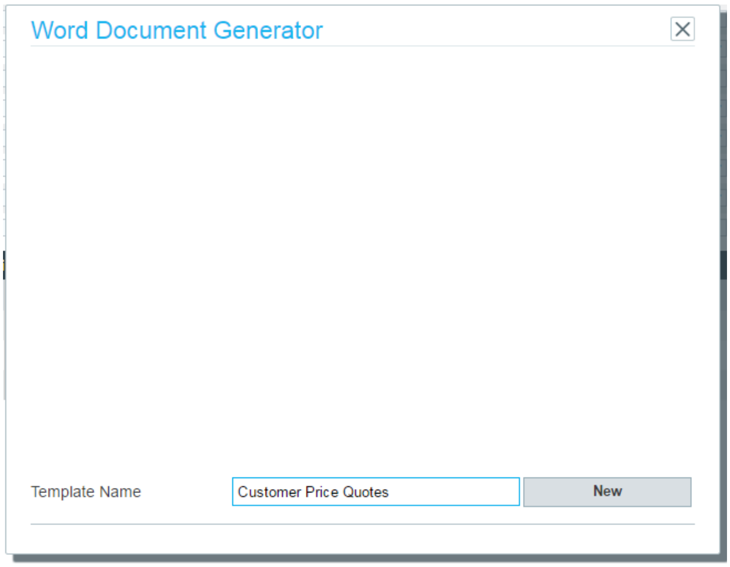


Figure 80: Creating a new Word template

6. Design the general layout of the document to conform to your company's standards. For example, you might add your corporate logo in the document header and contact information in the footer. This will provide a visual frame of reference for your template.

7. The first time a template is opened in Word, make sure the **Developer** tab is enabled; you will be primarily working with the tools in this tab.
Tip: To enable the **Developer** tab in Word 2010/2013: Open the **FILE > Options** window and select **Customize Ribbon**. Flag the **Developer** option in the **Customize the Ribbon** list.

8. From the **Developer** tab, select **XML Mapping Pane**.

9. From the **Custom XML Part** list, choose the ***Priority*** form from which you opened the Document Generator–in our example, Price Quotations for Customers (see **Figure 81**). The **XML Mapping Pane** now displays a list of all form columns available to the template. Below the upper-level form columns are the sub-level forms and all of their columns (see below for more details).

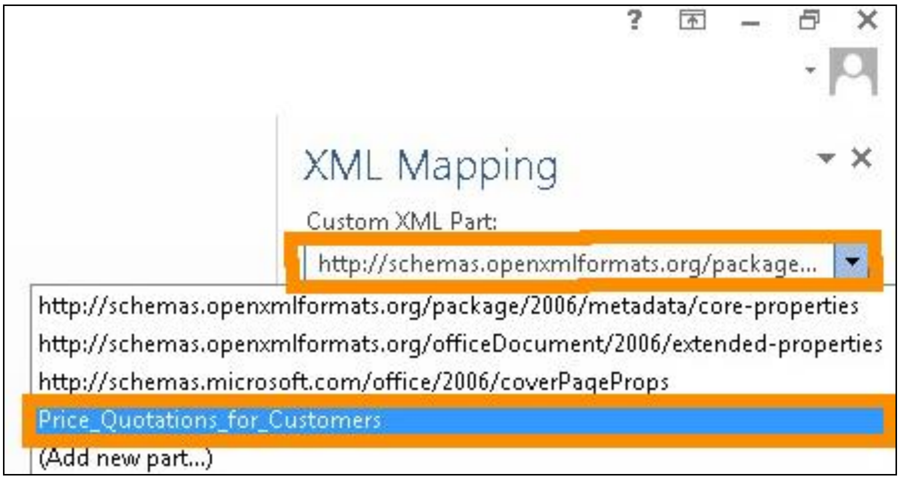


Figure 81: Choosing the *Priority* form in the XML Mapping pane

10. To add a column from the upper-level form to the template, right-click the column name, and choose **Insert Content Control > Plain Tex**t (see **Figure 82**). The column now appears in the template as an XML tag. Continue designing the template and adding columns as desired. **Note**: Unlike in earlier versions of ***Priority***, from version 16 you should not add tags of the names of any forms (upper- or sub-level) to the template, as that could have adverse effects.

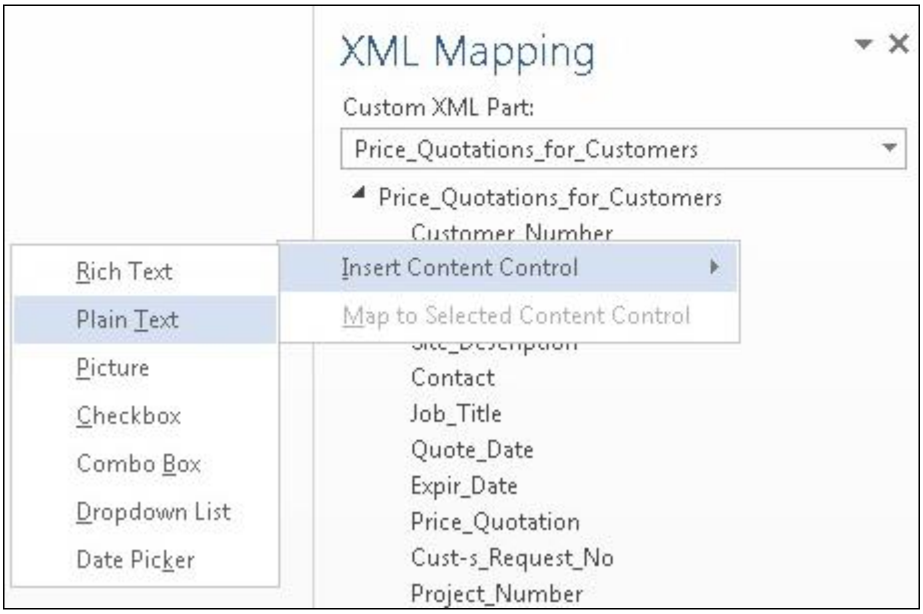
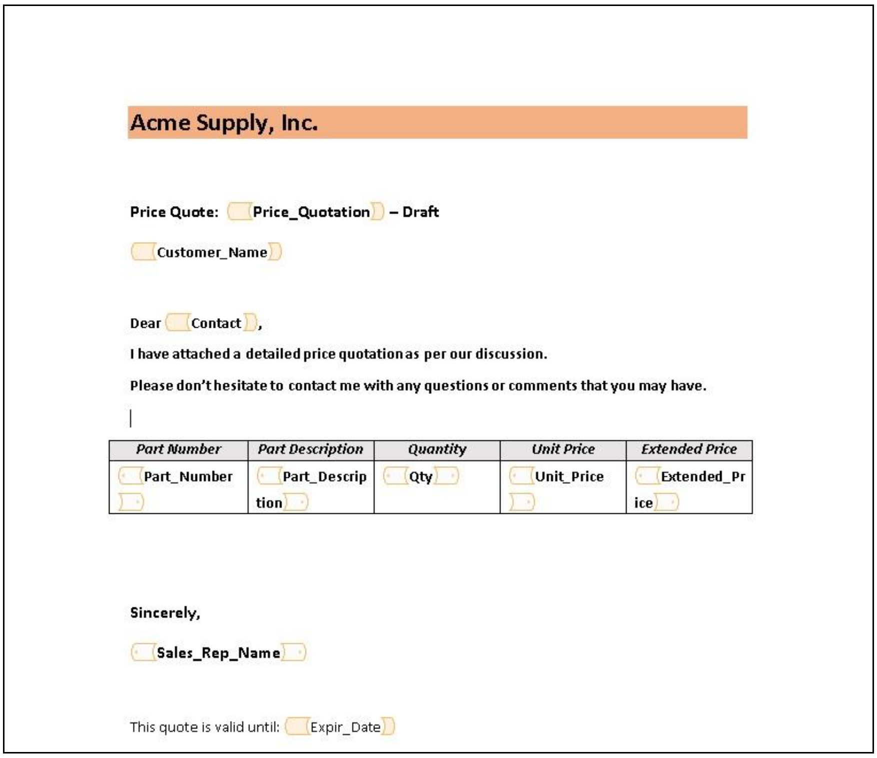


Figure 82: Adding XML tags to the template



Acme Supply, Inc.

Price Quote: Price_Quotation – Draft

Customer_Name

Dear Contact,

I have attached a detailed price quotation as per our discussion.

Please don't hesitate to contact me with any questions or comments that you may have.

Part Number	*Part Description*	*Quantity*	*Unit Price*	*Extended Price*
Part_Number	Part_Description	Qty	Unit_Price	Extended_Price

Sincerely,

Sales_Rep_Name

This quote is valid until: Expir_Date

Figure 83: A Word template design including sub-level tags

11. To insert a column from a sub-level form of line items (e.g., **Itemized Quotation**), it is recommended that you first create a table comprised of two rows and the desired number of columns (using Word's built-in table tools). In the first row, enter the column headings as you would like them to appear and place the XML tags representing the sub-level form columns in the second row. In the example above (see **Figure 83**), the table displays a list of items included in the quote, including their part number, description, quantity and price. Although the table in the template only contains one row (besides the headings), when a given document (in our example, a price quote) containing multiple rows is sent to Word from ***Priority***, the table will automatically grow to accommodate them (e.g., if the sub-level form contains five rows, Word will add five rows to the table in the final document).
    Note: Use this table exclusively for columns from this sub-level form.

12. If you anticipate that the data in a particular form will cause the document to spill over onto a second page, use a **Section Break** to create a new page, then disable the **Same as Previous** option in its header. This will restrict the company letterhead to the first page of the document.

13. Save the template. Make sure the file is saved as a template file with the **.dotx** file extension.

14. Import the new template to the system by clicking the in the **Word Document Generator** dialogue box (see **Figure 84**).

15. If you want to define the new template as read-only, so that users will not be able to edit documents that use this template, flag the checkbox next to the template.

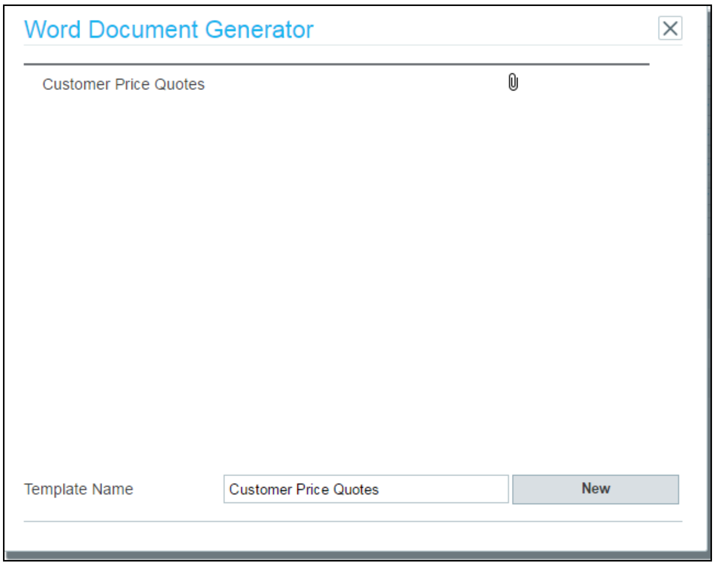


Figure 84: Importing a new template

Editing and Deleting XML templates

To edit an existing template for a form:

1. Open the form in question.
2. Click the **Options Menu** button, click **Design** and select **the Word Document Generator**.
3. In the **Word Document Generator** dialogue box that opens, move to the line of the template you want to edit and click the icon (see **Figure 85**). The file is downloaded.
4. Click the file to open it in Word. Edit the template as desired and save it, then close the file.
5. Import the revised template by clicking the icon in the **Word Document Generator** dialogue box.
6. If you want to define the new template as read-only, so that users will not be able to edit documents that use this template, flag the checkbox next to the template.

To delete a template for a form:

1. Open the form in question and retrieve any record.

2. Click the **Options Menu** button, click **Design** and select the **Word Document Generator**.

3. In the **Word Document Generator** dialogue box that opens, move to the line of the template you want to delete and click the icon.

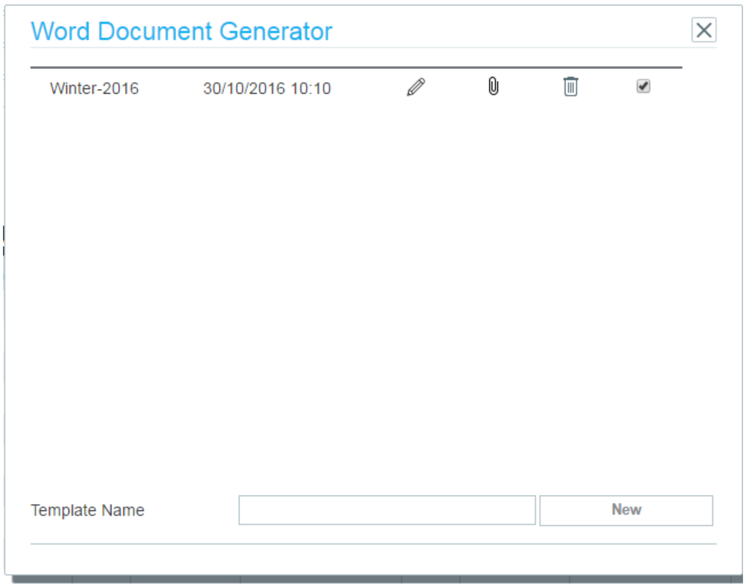


Figure 85: The Word Document Generator

Exporting Form Data to Word

Once you have defined your template, you can use it to create documents from individual form records. To do so from the ***Price Quotations for Customers*** form:

1. Retrieve the record (or records) whose data you wish to export.

2. Click the **Options Menu** button, click **File** and select **Send to Microsoft Word**.

3. Select the desired template in the **Choose Template** dialogue box and choose one of the following options:
   - **Print:** Prints the document without displaying it.
   - **Display:** Opens the document in Word.
   - **Mail:** Opens an e-mail message in the ***Compose Mail*** form with the document as an attachment.

- **Automatic Mail:** Sends an e-mail to the designated contact with the document as an attachment (without opening the ***Compose Mail*** form).
- **Automatic Fax:** Faxes the document to the designated contact (without opening the ***Compose Mail*** form).

4. Flag the **All Form Records** option to print, display or send all of the records currently retrieved in the form (for example, if you retrieved all price quotations opened on a particular date). Each record will appear on a separate page.
   Tip: You do not have to be in Multi-Record Display Mode for this option to work.

5. Flag the **Save as Attachment** option if you want to attach the Word document to the current record.

6. Flag the **As PDF** option to save the document as a PDF file and send it as an e-mail attachment.
   Note: This option appears only if Office 2010 is installed on the computer from which you are working.

7. Click **OK**. A new document is created in Word, in which each XML tag is replaced by its corresponding column value in the current form record. You can now edit the document, if necessary, and print it out for your customer.

The Spreadsheet Template Generator

This feature allows you to create spreadsheet templates based on data exported from ***Priority*** forms and reports.

Priority provides two methods of working with spreadsheets: via a direct interface with Excel or by exporting files to additional spreadsheet applications (see p.148). By default, ***Priority*** exports data directly to Excel, but this setting may be revised by your system administrator by changing the SPREADSHEET system constant.

Generating Templates via Excel

To design a template for form data:

1. Open the form whose data you want to export and retrieve any record.

2. Click the **Options Menu** button, click **Design** and select the **Spreadsheet Template Generator**.

3. Record a name for the template in the **New Template** dialogue box (see **Figure 86**).
   Note: After the first template has been created for this form, the **Design**

Templates dialogue box opens, in which you can choose between editing an existing template for the current form, or adding a new one.

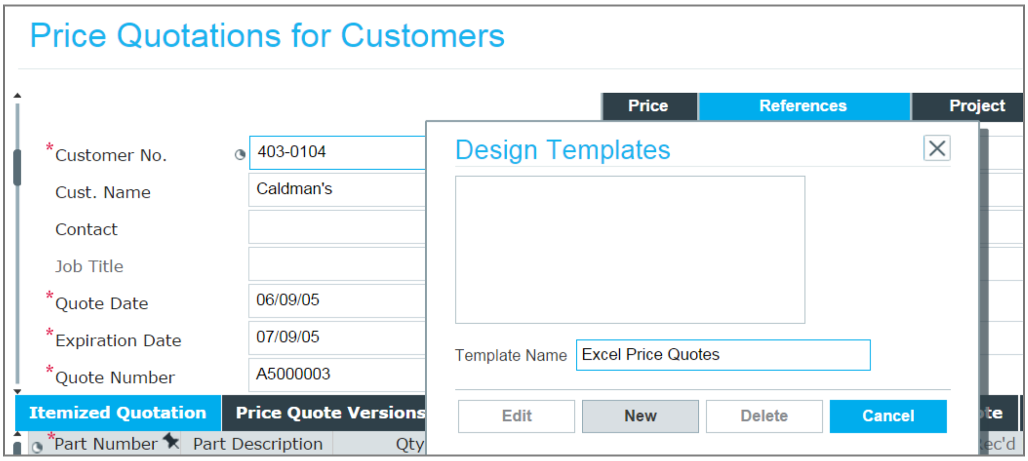


Figure 86: Creating a new Excel template from a form

4. Click **OK**. Excel will open automatically, displaying the data from the current form record in an *.xlt* file. Use the formatting tools in Excel to design the spreadsheet exactly as you want it (e.g., change fonts, add text, hide columns).

5. Use Excel's **PivotTable** and **PivotChart** options to create the desired graphic presentation of your data.

6. Save the template.
Warning: Do not use **Save As** or change its name; also, do not change the name of the *.xls* sheet called *DataSheet*, where the ***Priority*** data is stored, and do not perform any changes to it that are not design-oriented (for example, deleting columns, defining expressions). Such changes should be made in a new sheet, where they will be preserved.

To edit an existing template for a form:

1. Open the form in question and retrieve any record.

2. Click the **Options Menu** button, click **Design** and select the **Spreadsheet Template Generator**.

3. In the **Design Templates** dialogue box that opens, move to the line of the template you want to edit and click **Edit**. The file opens automatically in Excel.

4. Edit the template as desired and save it according to the instructions above.

To delete a template for a form:

1. Open the form in question and retrieve any record.
2. Click the **Options Menu** button, click **Design** and select the **Spreadsheet Template Generator**.
3. In the **Design Templates** dialogue box that opens, move to the line of the template you want to delete and click **Delete**.

To design a template for report data:

1. Locate the report in the ***Priority*** menu. Right-click the report title and select **Spreadsheet Template Generator**.
2. Record a name for the template in the **New Template** dialogue box.
   Note: After the first template has been created for this report, the **Design Templates** dialogue box opens, in which you can choose between editing an existing template for the current form, or adding a new one.
3. Click **OK**. The report's input screens will appear, as you will now be running a new report. Continue running the report.
4. Excel will open automatically, displaying the results of the report in an *.xlt* file. Use the formatting tools in Excel to design the spreadsheet exactly as you want it (e.g., change fonts, add text, hide columns).
5. Use Excel's **PivotTable** and **PivotChart** options to create the desired graphic presentation of your data.
6. Save the template.
   Warning: Do not use **Save As** or change its name; also, do not change the name of the *.xls* sheet called *DataSheet*, where the ***Priority*** data is stored, and do not perform any changes to it that are not design-oriented (for example, deleting columns, defining expressions). Such changes should be made in a new sheet, where they will be preserved.

To edit an existing template for a report:

1. Locate the report in the ***Priority*** menu. Right-click the report title and select **Design Spreadsheet Templates**.
2. In the dialogue box that opens, move to the line of the template you want to edit and click **Edit**. The file opens automatically in Excel.
3. Edit the template as desired and save it according to the instructions above.

To delete a template for a report:

1. Locate the report in the ***Priority*** menu. Right-click the report title and select **Design Spreadsheet Templates**.

2. In the dialogue box that opens, move to the line of the template you want to delete and click **Delete**.

To export data to Excel:

1. For a form, retrieve the desired record and click in the row of shortcuts. Or click the **Options Menu** button, click **File** and select **Send to Spreadsheet**. For a report, run the report, selecting the **New** and **Send to Spreadsheet** options.

2. Select the desired template in the **Choose Template** dialogue box. To create a regular Excel document, select **No Template**.

3. A new spreadsheet opens in Excel, which you can now edit and print out for your customer.

Generating Templates via Export to Spreadsheet Applications

To design a template for form data:

1. Open the form whose data you want to export and retrieve any record.

2. Click the **Options Menu** button, click **Design** and select the **Spreadsheet Template Generator**.

3. Record a name for the template in t**he Design Templates** dialogue box (see **Figure 87**)**.**
   Note: After the first template has been created for this form, t**he Design Templates** dialogue box opens, in which you can choose between editing an existing template for the current form, deleting a template or adding a new one (see **Figure 89**).

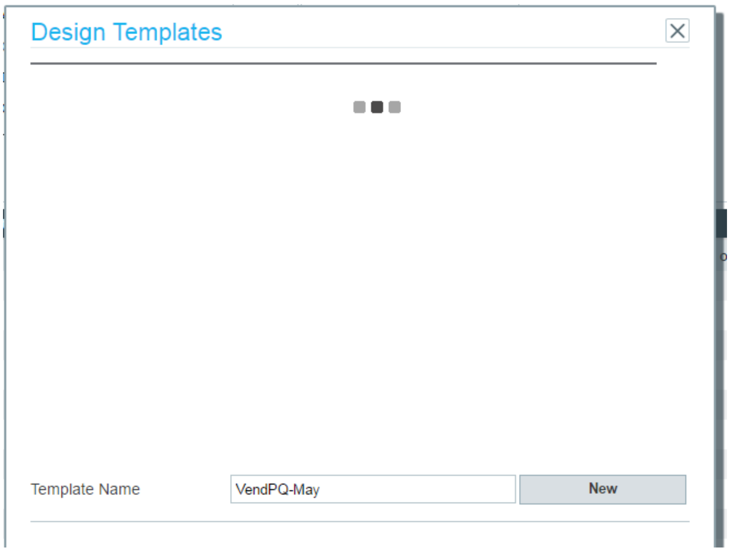


Figure 87: Creating a new spreadsheet template from a form

4. Click **New**. The file is downloaded

5. Click the file to open it in your default spreadsheet application. The spreadsheet will open, displaying the data from the current form record in an *.xlsx* file. Use the formatting tools in the spreadsheet to design it exactly as you want it (e.g., change fonts, add text, hide columns).

6. Use the spreadsheet's **PivotTable** and **PivotChart** options to create the desired graphic presentation of your data.

7. Save the template.
   Warning:

   - Do not use **Save As** or change the file name.

   - Do not change the name of the *.xlsx* sheet called *DataSheet*, where the ***Priority*** data is stored, and do not perform any changes to it that are not design-oriented (for example, deleting columns, defining expressions). Such changes should be made in a new sheet, where they will be preserved.

8. Import the new template by clicking the icon in the **Design Templates** dialogue box (see **Figure 88**).

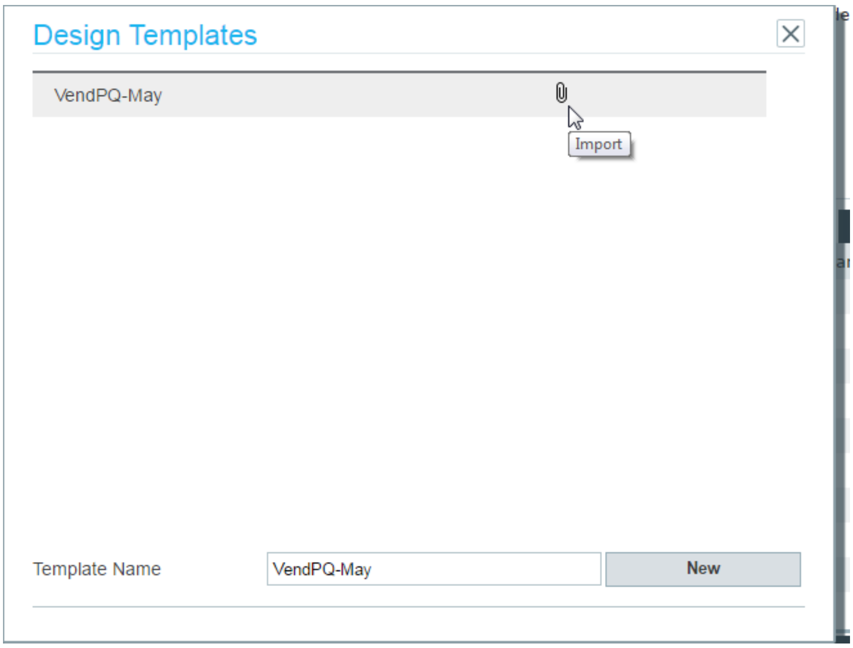


Figure 88: The Design Template dialogue box

Note: Templates created using the *.xlt* format will appear in the list of templates but will not be accessible when the **SPREADSHEET** constant is set to 0.

To edit an existing template for a form:

1. Open the form in question and retrieve any record.
2. Click the **Options Menu** button, click **Design** and select the **Spreadsheet Template Generator**.
3. In the **Design Templates** dialogue box that opens, move to the line of the template you want to edit and click the icon (see **Figure 89**). The file is downloaded.
4. Click the file to open it in your default spreadsheet application. Edit the template as desired and save it according to the instructions above, then close the file.
5. Import the revised template by clicking the icon in the **Design Templates** dialogue box.

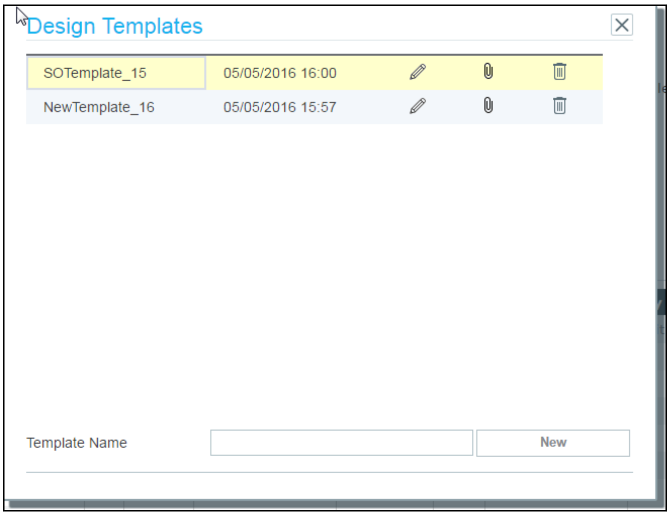


Figure 89: The Design Template dialogue box

To delete a template for a form:

1. Open the form in question and retrieve any record.
2. Click the **Options Menu** button, click **Design** and select the **Spreadsheet Template Generator**.
3. In the **Design Templates** dialogue box that opens, move to the line of the template you want to delete and click the icon.

To design a template for report data:

1. Locate the report in the ***Priority*** menu. Right-click the report title and select **Design Spreadsheet Templates**.
2. Record a name for the template in the dialogue box.
   Note: After the first template has been created for this report, you can choose between editing an existing template for the current form and adding a new one.
3. Click **New**. The report's input screens will appear, as you will now be running a new report. Continue running the report.
4. The file is downloaded and displayed at the bottom of your browser window. Click the file to open it in your default spreadsheet application. The spreadsheet will open, displaying the results of the report in an *.xlsx* file. Use the formatting tools in the spreadsheet to design it exactly as you want it (e.g., change fonts, add text, hide columns).
5. Use the spreadsheet's **PivotTable** and **PivotChart** options to create the desired graphic presentation of your data.
6. Save the template.
   Warning:
   - Do not use **Save As** or change the file name.
   - Do not change the name of the *.xlsx* sheet called *DataSheet*, where the ***Priority*** data is stored, and do not perform any changes to it that are not design-oriented (for example, deleting columns, defining expressions). Such changes should be made in a new sheet, where they will be preserved.
7. Import the new template by clicking the icon in the open dialogue box.

To edit an existing template for a report:

8. Locate the report in the ***Priority*** menu. Right-click the report title and select **Design Spreadsheet Templates**.
9. In the dialogue box that opens, move to the line of the template you want to edit and click the icon. The file is downloaded.
10. Click the file to open it in your default spreadsheet application. Edit the template as desired and save it according to the instructions above, then close the file.
11. Import the new template by clicking the icon in the report dialogue box.

To delete a template for a report:

1. Locate the report in the ***Priority*** menu. Right-click the report title and select **Design Spreadsheet Templates**.

2. In the dialogue box that opens, move to the line of the template you want to delete and click the icon.

To export data to a spreadsheet:

1. For a form, retrieve the desired record and click in the row of shortcuts. Or click the **Options Menu** button, click **File** and select **Send to Spreadsheet**.

Note: For a report, see **Sending a New Report to a Spreadsheet** (p.101).

---

2. Select the desired template in the **Choose Template** dialogue box. To create a regular spreadsheet document, select **No Template**.

3. The file is downloaded. Click the file to open it in your default spreadsheet application. You can now edit and print it out.

The Label Generator

This feature allows you to create labels from a given form, using data that is taken automatically from designated form columns. The ***Label Generator*** program automatically populates the ***Label Preparation Work Area*** form with values from the designated form and/or its upper-level forms. Labels that are prepared in this fashion can then be edited in the ***Label Preparation Work Area*** and/or printed.

Note: In order to make full use of these features, you must have a label printer and label printing program, such as CodeSoft or BarTender, installed on your computer (for details, see the Help for the ***Print Labels*** program, located at the following menu path: ***Inventory → Label Printing***).

Designing Labels for a Form

Use the ***Label Generator*** form and its sub-level to design a label for any form, based on the values of the designated form columns. When the ***Label Generator*** is run from that form, each variable will be populated automatically with the value of the linked form column.

In the following example, we'll practice designing a label for sold parts.

Example:

1. Enter the ***Label Generator*** form and retrieve the ***Order Items*** form.

2. Select "Orders" as the **Type of Label** and indicate the **Quantity of Labels** to be prepared for each order item.

3. Move to the ***Label Parameters*** sub-level form.

4. In the line for the first **Parameter**, select "Part Number" as the **Form Column**.

5. Move to the next line and select "Unit Price" as the **Form Column** to be linked to the second **Parameter**.

6. In the third line, flag the **Upper-level Form Col** column in order to link the third parameter to a column that appears in the upper-level ***Sales Orders*** form and then select "Order" as the **Form Column**.

7. Do the same in the fourth line, and select "Date" as the **Form Column**.

Creating Labels Using the Label Generator

Once you have designed a label for a given form, you can use it to generate an unlimited number of labels from individual form records. When a label is designed for a sub-level form (as in the above example), you can choose between preparing labels for the record on which the cursor is located and preparing them for all displayed records in the sub-level form. You can also choose between editing the label data in the ***Label Preparation Work Area*** or printing the labels immediately.

Example:

1. In the ***Sales Orders*** form, retrieve the order for which you wish to create labels and move to the ***Order Items*** sub-level form.

2. Click the **Options Menu** button, click **Design** and select **Label Generator**.

3. In the dialogue box that opens (**Figure 90**), select the desired label type.

4. Flag the **All Form Records** option to create labels for all of the records currently retrieved in the form (all items in the current order).

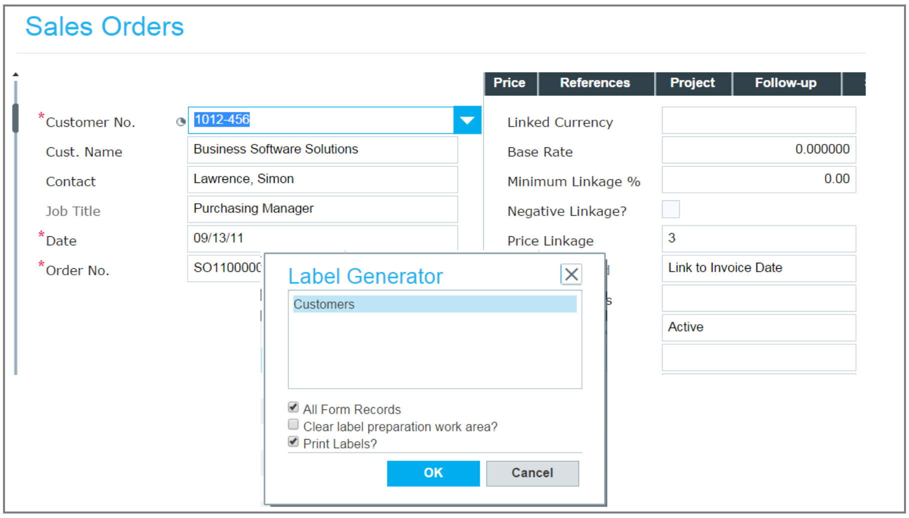


Figure 90: Creating a new label from a form

5. Flag the **Print Labels** option to print labels immediately.

6. Click **OK**. The new labels are loaded into the ***Label Preparation Work Area***, in which each variable is populated by its corresponding column value in the designated form records, and they are printed immediately.

The Letter Generator

This feature allows you to produce an infinite variety of pre-formatted letters which can be sent to customers, vendors and contacts, based on data fields taken from the relevant ***Priority*** forms. You can also include one or more attachments with each letter. After creating the letter, you can print it or send it via e-mail to a designated third party (or group).

In the following example, we'll practice designing and creating a letter to send to customers.

Example:

1. Enter the ***Letter Generator*** form and move to a blank line.

2. Record a **Letter Name** (e.g., "Rewards Program Invitation").

3. In the **Create Letters Using** column, choose the appropriate program (e.g., "Letter to Customer").

4. Enter the ***Remarks*** sub-level form to design the letter (see **Figure 91**).

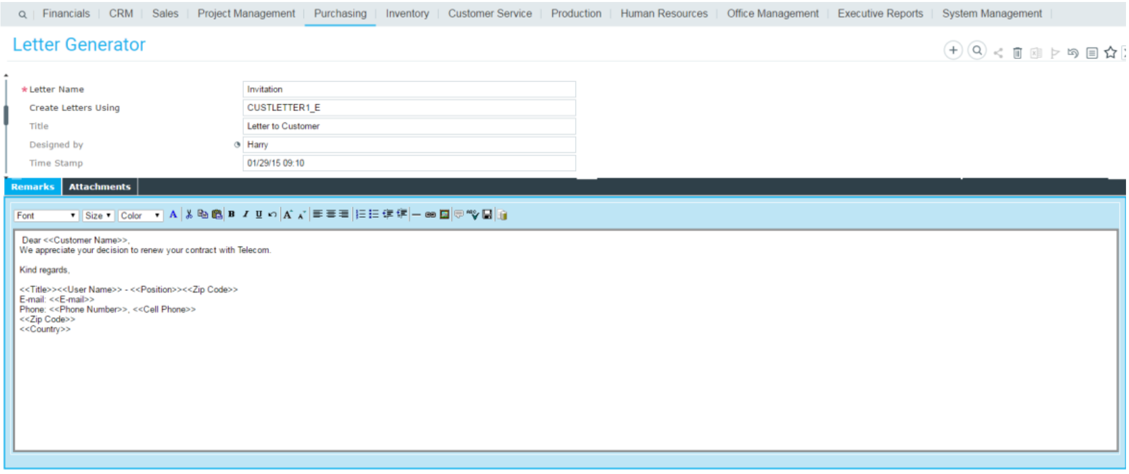


Figure 91: The Letter Generator

5. Record the following text in the message area: “Dear ”. Click the button on the form's Toolbar to access a list of column titles and choose the **Customer Name** column.

6. Press **Enter** to move to a new line and record the desired text.

7. Use the button and accompanying text to design a signature.
   For example:
   "Kind regards, "
   Title, **User Name** " - " **Position**
   "E-mail: " **E-mail**
   "Phone: " **Phone Number** ", " **Cell Phone**

8. To send the letter to one or more customers, run the ***Letter to Customer*** program (***CRM*** → ***Customers*** → ***Customer Reports***).
   Note: You can also retrieve the desired customer in the ***Customers*** form and run the ***Letter to Customer*** program by direct activation.

Similarly, you can design and create letters to vendors and contacts.

Advanced Data Retrieval and Input

In the first **Data Retrieval** section (p. 53) you practiced retrieving records by means of column values and wildcards (the asterisk and the question mark). You also learned how easy it is to execute complex queries with built-in sorting of results using the Query Generator. The following sections describe more advanced methods of honing your query.

Note: All of the following examples refer to an upper-level form (***Currencies***). While you generally don't need to retrieve records in a sub-level (all records are retrieved automatically), you can execute a query there to limit the records displayed.

The AND Condition

Among the capabilities of the Query Generator is to specify multiple conditions in a single query. You can achieve the same result in Query mode by simply specifying values in more than one form column.

Example:

To retrieve any currency whose exchange rate is **1** and whose smallest unit is **cents**, take the following steps (remember to press **F11** to enter Query mode):

1. Enter the ***Currencies*** form.

2. Type **1** in the **Exchange Rate** column.

3. Type **Cents** (or **C***) in the **Subdivision** column.

4. Press **Enter** to execute the query.

The above is considered an AND condition. You have asked to retrieve any record whose exchange rate is **1 and** whose smallest subdivision is **cents**.

Whenever you use an AND condition, remember to specify all query conditions in the various columns **before** executing the query.

The OR Condition

One function that is not supported by the Query Generator is to specify more than one query condition in the same column. This method is used when you want to retrieve all records that fill **any** of a set of query conditions.

Example:

To retrieve the records for both U.S. Dollars and Euros, perform the following actions:

1. In Query mode, in the **Curr** column, type **$** (or select it from the Choose list). Do <u>not</u> press **Enter**.

2. Return to Query mode (press **F11** again) without executing the query. The dollar sign that you just typed in will disappear, but it is held in memory.

3. In the **Curr** column, type **EUR** (or select it from the Choose list).

4. Execute the query (press **Enter**).

The above is considered an OR condition. You have asked to retrieve any record whose currency code is either **$ or EUR** (the result, of course, is two separate records).

You can also use an OR condition by specifying query conditions in more than one column.

Example:

To retrieve **any** currency whose code is **EUR or** whose exchange rate is **1**, do the following:

1. In Query mode, type **EUR** in the **Curr** column.

2. Return to Query mode without executing the query.

3. In the **Exchange Rate** column, type **1**.

4. Execute the query.

In sum, whenever you want to use an OR condition, remember to:

1. Designate the first query condition (be sure you do so in Query mode).

2. Return to Query mode without executing the query.

3. Designate the next query condition.

4. Repeat steps 2 and 3 as many times as necessary.

5. Execute the query.

Multiple Conditions Enclosed in Brackets

You will recall that query conditions are case sensitive. What, then, do you do when you want to retrieve all records having a given value, but are not sure if the string is in capitals or lowercase letters?

The solution is to enclose the possible characters (e.g., **D** and **d**) inside a pair of vertical lines **||** (in most keyboards, the vertical line is accessed by pressing **Shift+**). Any record that meets **either** of these conditions will be retrieved (just like an OR condition). This feature is available both in Query mode and in the Query Generator.

Example:

Type **|Dd|ollars**. You will retrieve the record for Dollars, regardless of whether it begins with a capital or lowercase letter.

You can use the same method to retrieve several records simultaneously.

Examples:

- Type |**DF|***. You will retrieve all records that begin either with the letter **D** or the letter **F** (e.g., Dollars, French Francs).
- Type *|**sn**|. You will retrieve any currency whose name ends either in **s** or in **n** (e.g., Dollars, Yen).

The above examples placed only two characters between the pair of vertical lines. You can, however, specify as many characters between the lines as you wish. If the characters in question are sequential, you can specify the first and last ones, separated by a hyphen, to represent the entire range.

Example:

Type **|D-J|***. You will retrieve all records that begin with the letters **D** to **J** inclusive (e.g., Deutsche Marks, French Francs, Italian Liras).

Backslash Delimiter

If you want to record a query condition with a string that includes one of the wildcards (*,?, |) as an actual character, use the backslash "****" as a delimiter. This feature is available both in Query mode and in the Query Generator.

Note: The following examples are hypothetical. They will not produce results in the ***Currencies*** form.

Examples:

- To retrieve a record with the value of "A*" in its field, type **A***.
- To retrieve "ABC?", type **ABC\?**.
- To retrieve "ABC|", type **ABC\|**.
- To retrieve all records that contain an asterisk, type *******.
  Note: The two outer asterisks serve as wildcards.

Retrieving Null Values

You will recall that the Query Generator allows you to retrieve null values by combining an equal sign with an empty column value. Alternatively, you can enter Query mode and type **NULL** in the appropriate column.

Example:

> Move to the **Subdivision** column of the ***Currencies*** form and type **NULL**. You will retrieve the Price Index record (which has no value in this column).

Note: You can only type **NULL** in a column of **String** type.

Using Operators

In a column requiring a numerical value (e.g., number, date, time), you can use operators to specify an exact value or a range of values.

For your convenience, you can choose the desired operator by clicking on the button that appears to the right of the column in question (see **Figure 92**). Operators can only be accessed from an **odd** line (Ln 1, Ln 3, etc.). Specify the query condition on the following even line.

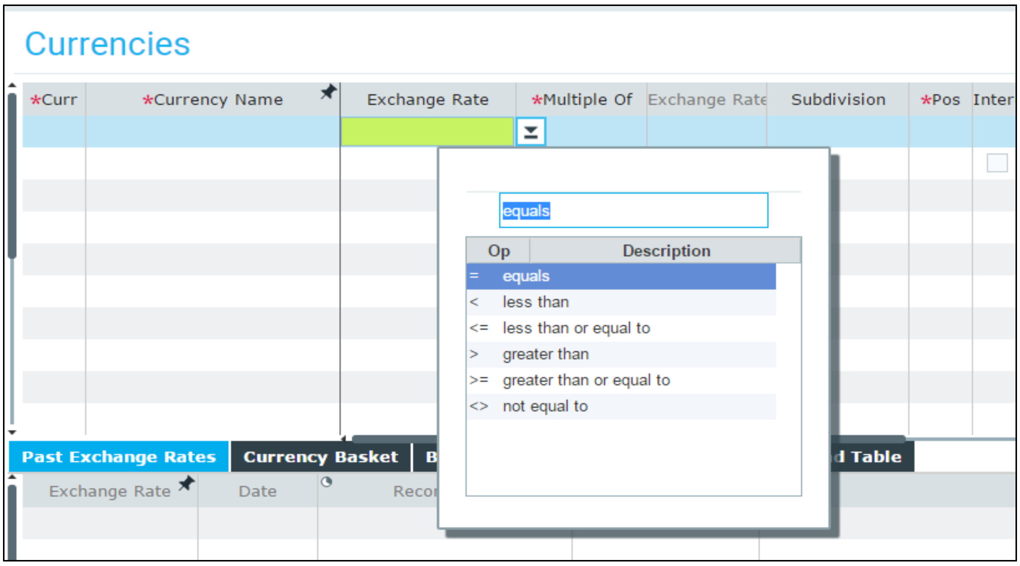


Figure 92: The list of operators

To tell whether you are on an odd or even line:

- The button that appears on an odd line includes a list of operators. The same button appearing on an even line accesses a Choose list.

Note: You can also use operators with strings.

Example:

1. Move to the **Curr** column.

2. By selecting “>“ from the list of operators and typing **PS** in the second line, you can retrieve any currencies whose code is “greater than” PS (e.g., SEK, XEU).

Note: You can use several operators together to obtain, for instance, values greater than X and less than Y. In this case, you need to use one set of odd and even lines to define the X condition, and another set of lines to define the Y condition (see **Figure 93**). However, this result is much easier to achieve using the **Value** and **To Value** columns in the Query Generator.

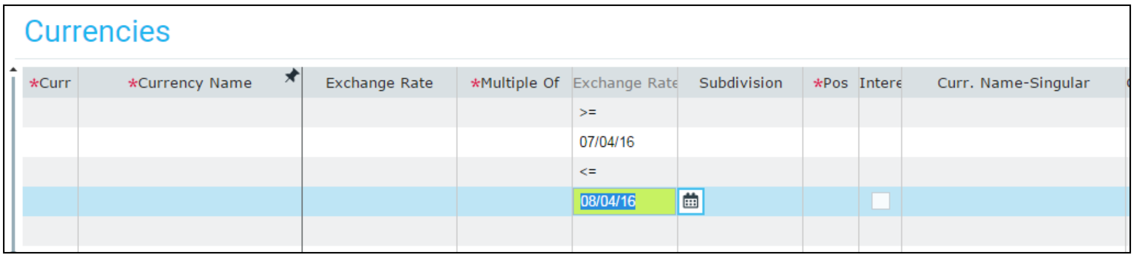


Figure 93: Retrieving records by a range of dates

Advanced Sorting of Retrieved Records

As we have seen, the Query Generator allows you to presort your query results within the definition of the query itself. The same functionality is also available outside the generator, though without the benefit of saving your conditions for future queries.

The system enables you to sort by several columns at once, ranking them in order of importance. The column with the highest priority (the lowest integer) will be sorted first (primary sort), data in the column with the next priority will be sorted next (secondary sort), and so on. To sort by more than one column at a time, sort conditions are set before retrieving the data records.

In order to sort by more than one column, you must prioritize the sort. The order in which the columns are sorted is specified by a number, i.e., 1 = the primary sort, 2 = the secondary sort, 3 = the tertiary sort, and so forth. The type of sort is determined by the line in which the sort is specified; ascending sorts are specified in the first form line, descending sorts in the third. This is best explained by an example.

Example:

To sort currencies by exchange rate (descending primary sort) and then by name (ascending secondary sort), take the following steps (see **Figure 94**):

1. Enter Query mode.
2. Place the cursor in the **Curr** column, and type * (to indicate that you intend to retrieve all records; this is the query condition)
3. Move to the **Exchange Rates** column.
4. Move the cursor down to the third line in the form (to obtain a descending sort by exchange rates).
5. Type **1** in the column (to indicate that this is the primary sort).
6. Now move to the **Currency Name** column.
7. Move the cursor up to the first line in the form (to obtain an ascending sort by name).
8. Type **2** (to indicate that this is the secondary sort).
9. Execute the query.

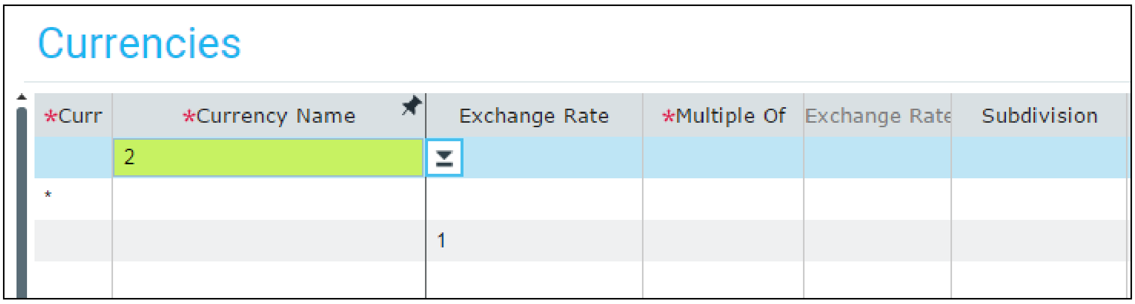


Figure 94: An illustration of the above example

Consequently, all records will be displayed by the following criteria:

- The currency with the highest exchange rate will be displayed in the top form row, followed by all other currencies in descending order of their exchange rates (this is the prime **Exchange Rates** descending sort).
- Wherever there is an instance of two currencies having an identical exchange rate, they will be listed in ascending alphabetical order (this is the **Currency Name** sort).

In sum, remember the following rules when sorting records by more than one column:

- Use integers to designate sort priority (1 for the primary sort, 2 for the secondary sort, and so on).
- Designate sort priority on Ln 1 to obtain an ascending sort; use Ln 3 to yield a descending sort.
- Do not forget to specify one or more query conditions, together with the sort criteria.
- Do not execute the query until you have recorded all query conditions and all sort priorities.

Efficient Use of Queries

The number of records in the database varies from one table to the next. For instance, the ***Currencies*** table is unlikely to contain more than a dozen records, whereas the ***Chart of Accounts*** is apt to hold a large amount.

When the number of records in a certain table is small (less than 100), the time needed to retrieve the records from the database is extremely short, even when all records are being retrieved.

When the number of records in a table is relatively large, it is recommended that you try to execute efficient queries that will cut down on retrieval time. For instance, instead of retrieving all records, try to limit the number being retrieved (e.g., with the help of wildcards).

A highly efficient technique is to designate the beginning of a name or description followed by a wildcard. In contrast, retrieval by a wildcard followed by the end of a name or description is extremely slow, as it requires the system to search through all the records in the table in order to find those which meet the query conditions.

Think of a regional telephone book. If you know the last name of the person whose number you are seeking, you can generally limit the search to one or two pages. Even if you only know the first two letters of the last name, you can probably narrow down your search to about 50 pages. But if you only know the last five letters in the person's last name, you would have to search through every single entry in the phone book!!

Examples:

- Suppose you wish to retrieve all expense accounts from the **Chart of Accounts** that begin with the number 6 and end with the suffix "-99". An efficient query would be 6*, whereas *-99 would yield a long search for records.

- If the description of all expense accounts begins with the word "Expense", you can designate an efficient query: Expense*. However, if some other string sometimes precedes the word "Expense", you would need to designate an inefficient query (*Expense*), which would take a long time. In that case, it would be wiser to find some other criteria with which to retrieve the accounts (e.g., their number, as in the previous example).

An inefficient query in a large table requires a massive database search. When that happens, you will receive a warning or error message (depending on whether or not your system manager has decided to permit massive searches). If possible, change the retrieval query and try again. If problems are encountered, ask your system manager for assistance.

Note: The greater the number of records in a table, the more important it is to perform efficient queries and the slower the retrieval time for inefficient queries.

File Explorer

The ***File Explorer*** enables you to organize the files and folders you use in ***Priority***, just as you use Windows Explorer to organize the files and folders on your computer. Once you are in the ***File Explorer***, you can copy, move, duplicate and rename files and folders, create new folders, and move files and folders to and from the ***Priority*** database. Any folders you use on a regular basis can be added to your **Favorite Links**, where they can be arranged in the most convenient order. You can also assign permissions for each folder you create to the desired privilege group leaders. After adding a file to the ***File Explorer***, you can view any additional system locations to which the same file has been linked. In addition, you can lock a file for editing from the ***File Explorer*** and unlock a file you have locked.

Note: Use of the File Explorer requires the purchase of a separate module.

To run the ***File Explorer***, click the **Options Menu** button, click **File** and select **File Explorer** (**Figure 95**). Click on any folder in the left pane to view its contents (in a hierarchical structure). Individual files and sub-folders appear in the right pane.

To open a file or folder:

- Double-click it.
- Right-click it and select the **Open** command.

- Select the file or folder, and then click the **Options Menu** button, click **File** and select **Open**.
- Select it and press **Enter**.

To exit the explorer, click the **Options Menu** button, click **File** and select **Exit**.

Note: You will not be able to modify files that have been assigned a **Read Only** status (indicating that this file is being used by someone else), although you can work on a copy of the file. You can view a file's status and the name of the user who locked the file for editing in the **Status** and **Locked by** columns, respectively. For more details, see **Managing a File's Status**.

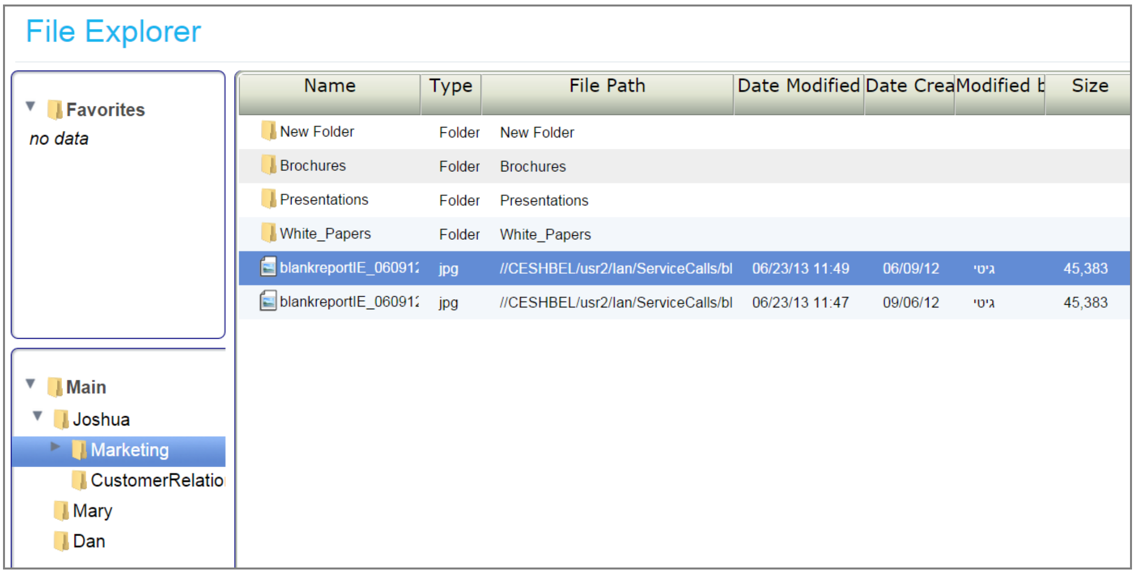


Figure 95: Viewing results in the File Explorer

You can add items to the ***File Explorer***, using any of the following options:

- Import a file or folder onto the ***Priority*** server.
- Copy or duplicate an existing file or folder, or create a new folder.

Items that are stored on the ***Priority*** server can be accessed at any time, by any user with the necessary permissions.

Importing Items into the File Explorer

In order to allow other users in the system to access a file that is stored on your hard disk or network drive, use the **Import Files** command to copy the file onto the ***Priority*** server, in the ..\..\system\mail directory. To do so, open the ***File Explorer***, right-click the sub-folder in which you want to add the file (within either the left or the right pane), and select **Import Files** from the drop-down menu. In the dialog box that opens, locate and double-click the desired file.

Tip: You can import several files simultaneously by holding down the **Ctrl** key and clicking on each item you want to import.

In a similar fashion, you can copy a file or folder from the Windows Explorer or from an MS-Outlook attachment (e.g., by **Ctrl+C**), and paste it into the ***File Explorer***, at the same time importing it into the ..\..\system\mail directory.

To paste the copied item into the ***File Explorer***, do **one** of the following:

- Right-click the relevant sub-folder and select **Paste & Import** from the drop-down menu
- Select the desired sub-folder and then click the **Options Menu** button, click **Edit** and select **Paste & Import**
- Press **Ctrl+V**.

Copying or Duplicating Items in the File Explorer

You can also copy or duplicate files within the ***File Explorer***. When you copy a file, this creates a shortcut pointing to the original file (or folder) stored on the ***Priority*** server, which can then be pasted into another system location (either within the ***File Explorer*** or as an attachment to a system record). In contrast, when you duplicate a file, this creates a new copy of the file on the ***Priority*** server.

To copy a file (or folder), do **one** of the following:

- Right-click the item in question and select the **Copy** command.
- Select the desired item and then click the **Options Menu** button, click **Edit** and select **Copy**.
- Select the desired item and press **Ctrl+C**.

You can then paste a shortcut to the copied item into the desired folder (e.g., by **Ctrl+V** or **Paste & Import**).

Alternatively, simply drag any file or folder directly into another folder, thereby creating a shortcut to that item in the desired folder.

To duplicate a file, do **one** of the following:

- Right-click the file in question and select the **Duplicate** command.
- Select the desired file and then click the **Options Menu** button, click **Edit** and select **Duplicate**.

A duplicate of the file will be created on the ***Priority*** server and stored in the same folder within the ***File Explorer***. Each duplicate created from a given file will be saved with the same name, and a different sequential number will be appended automatically to the end of each file name. The duplicate file can then be opened and its contents modified at any time, like any other file. Duplicate files can also be renamed and/or copied into another folder, as needed.

Viewing Additional Links to the File

You can view a list of any system locations to which a particular file has been linked, such as an attachments form (a sub-level of a number of ***Priority*** forms). simply right-click the desired file and select **Links to File**.

To view additional system locations - including other ***File Explorer*** folders - to which the file has been linked:

- Right-click the file in question and select **Links to File**.

Note: You can also view a list of links to attached files from within various system records.

Creating a New Folder and Assigning Permissions

To create a new folder in the ***File Explorer***, do **one** of the following:

- Right-click the folder in which you want to add a new sub-folder (within either the left or the right pane) and select **New Folder** from the drop-down menu.
- Select the folder in which you want to add a new sub-folder (within either pane) and then click the **Options Menu** button, click **File** and select **New Folder**.

You can then modify the folder's name by clicking on it and recording the desired name.

To assign and/or modify permissions for the folder you created:

1. Do **one** of the following:
   - Right-click the folder and select **Permissions**.
   - Select the folder in question and then click the **Options Menu** button, click **Edit** and select **Permissions**.
2. A window opens in which you can see the types of permissions that are assigned to different privilege groups for that folder (i.e., R = read, W =

write, A = administrator, N = navigation, X = none; see **Figure 96**). Right-click the privilege group for which you want to modify permissions.

3. In the pop-up menu that opens, choose the level of permissions to be assigned to users in that privilege group for the current folder and its contents.
   Note: The permissions defined for a folder are automatically applied to any sub-folders at lower levels in the Explorer, as are any later changes in these permissions. You can then directly modify the permissions for any sub-folders you created, as necessary.

4. Do the same for any additional privilege groups.

5. Click **OK**.

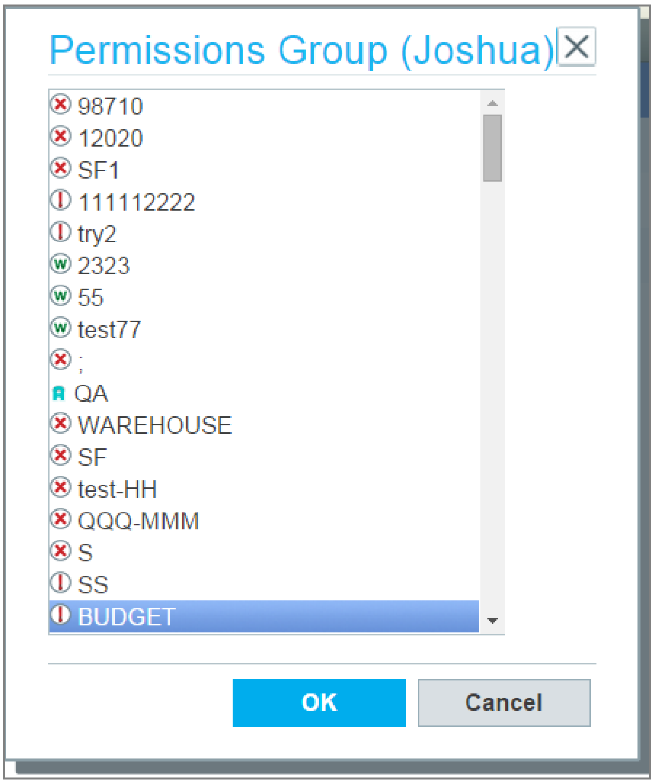


Figure 96: Permissions in the File Explorer

Note: Administrator Permission (A) enables users in the designated privilege group(s) to assign permissions for that folder to other privilege groups (as well as full write permission). Navigation Permission (N) enables users in the designated privilege group(s) to view sub-folders, but not files, within that folder.

Managing a File's Status

The ***File Explorer*** also enables you to manage the **Status** of individual files. The system automatically assigns each file a Read Only status whenever it is opened. This status indicates that the file can only be opened in read-only mode, ensuring that several different users do not attempt to modify the file simultaneously. The name of the user who is currently using the file appears automatically in the **Locked by** column. The file's status reverts back to Free (i.e., the **Status** column is cleared) automatically once it has been closed and updated on the server, indicating that the file is now free for editing.

You can also change a file's status manually. To do so, do **one** of the following:

- Right-click the file in question, select **Change Status** and then select the desired status from the drop-down menu (e.g., Read Only).
- Select the file in question, select **Change Status** from the **File** menu (in the **Options Menu**) and then select the desired status from the drop-down menu (e.g., Read Only).

Note: Only the user appearing in the **Locked by** column can change the status of a file that has been assigned the **Read Only** status.

Adding & Organizing Favorite Links

The easiest way to access folders that you use on a regular basis in the ***File Explorer*** is to link to these folders from your **Favorite Links**. You can then arrange your **Favorite Links** in the desired order or delete any links that are no longer in use.

To create a shortcut for a given folder under **Favorite Links**, simply right-click the desired sub-folder (within either the left or the right pane) and select **Add to Favorites** from the drop-down menu. Once folders have been added to your **Favorite Links**, click the ▷ arrow next to the **Favorite Links** folder to view its contents.

To move a folder up or down within the list, right-click the folder in question and select the desired option (e.g., **Move Down**, **Move to Bottom**).

To remove a folder from your **Favorite Links**, do **one** of the following:

- Right-click the folder in question and select the **Remove from Favorites** command.
- Select the desired folder and then click the **Options Menu** button, click **Edit** and select **Delete**.

- Select the desired folder and press **Del**.

Designing the File Explorer

You can further personalize the appearance of the ***File Explorer*** by hiding unnecessary columns (e.g., **Date Created** or **Date Modified**) and arranging the rest into the most convenient order. Use the mouse to drag any column to the desired position or use the **Arrange Columns** dialog box, as follows:

1. Click the **Options Menu** button, click **Design** and select **Arrange Columns**.
2. Use the dialog box that opens to make any of the following changes:
   - Move a column up or down in the list (by clicking the up and down arrows or by dragging an item to the desired place within the list).
   - Hide a column.

Each of the above customizations is reversible; furthermore, you can restore the ***File Explorer*** to its original format by clicking the **Restore Defaults** button at the bottom of the **Arrange Columns** screen.

Exporting Items from the File Explorer

To export a file or folder from the ***File Explorer*** and save it to your hard disk or network drive, you can either copy it into the Windows Explorer (e.g., by **Ctrl+C** and **Ctrl+V**) or drag and drop the item in question from the ***File Explorer*** into the desired location within the Windows Explorer. Alternatively, you can right-click the relevant item and select **Save** from the drop-down menu (or from the **Edit** menu in the **Options Menu**). In the dialog box that opens, locate the desired folder, then click **OK**.

Copying a Link

You can also copy links to any files maintained in the ***File Explorer*** into a text form or external document (e.g., an Outlook message or Word document). The link is copied into the Windows clipboard and can then be pasted where desired.

1. To copy a link, select the file in question and do **one** of the following:
   - Press **Ctrl+Y**.
   - Right-click the relevant file and select **Copy Document Link**.
   - Click the **Options Menu** button, click **Edit** and select **Copy Record Link**.
2. To paste a link that has been copied, move the cursor to the proper place in a ***Priority*** text form or external document and press **Ctrl+V**.

Removing Items from the File Explorer

To remove a file or folder from the ***File Explorer***, do **one** of the following:

- Right-click the item in question and select **Delete**.
- Select the desired item and then click the **Options Menu** button, click **Edit** and select **Delete**.
- Select the desired item and press **Del**.

Note: Deleting a file removes it from its current location in the ***File Explorer***, but does not delete the file from the ***Priority*** server.

Mail

Introduction

The ***Priority*** mail facility includes e-mail, intranet capabilities (communication between system users) and text messages.

In order to make use of these features, you must have an e-mail client such as MS-Outlook installed on your computer, or have an account with Gmail or another mail service, and a text message account and provider for text messaging. Intranet capabilities alone, however, can be implemented via the network.

The various mail features can be accessed in a number of ways:

- From the **Mail** menu in the **Options Menu**.
- From the ***Mail*** menu accessed from the ***Office Management*** module.

The following sections explain:

- Account configuration
- Composing and sending outgoing messages
- Receiving and replying to incoming messages.

Configuring Your Mail Account

Mail Options

You can set up mail to use Outlook, Gmail, or other email servers. ***Priority*** will use the mail service that was most recently defined. For example, if the mail setup program last run was for Gmail, messages will be sent and received using Gmail.

Setting Up Mail Using MS-Outlook

Click the **Options Menu** button, click **Mail** and select **Mail Options → Outlook → Mail Options**. This opens the **Mail Options** dialogue box (**Figure 97**).

If you do not want any automatic checking or notification of new/unread mail, simply flag the **Don’t check messages** option. When this option is chosen, you can check for new messages manually.

If you do want automatic notification, choose between the following options:

- **Check for new messages** at the specified interval.

- **Check for unread messages** at the specified interval.

Don't forget to specify the desired interval (15 minutes appears by default).

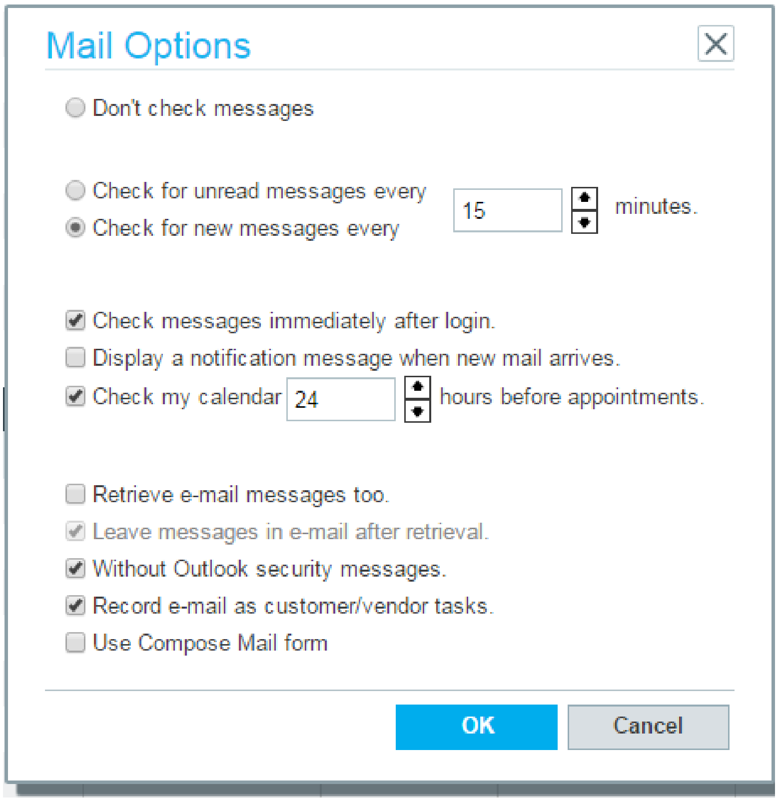


Figure 97: Mail Options dialogue box

In the next section of the dialogue box, decide whether you want the system to check for mail immediately upon logging in. This may be inconvenient if you are in a rush to log in.

In addition to or instead of automatic checking, you can check for mail manually at any time. To do so, do **one** of the following:

- Click the **Options Menu** button, click **Mail** and select **Mailbox** or **Check for New Messages**.
- Open the ***Mailbox*** form from the menu path: ***Office Management → Mail***.

External Mailbox

The mail utility enables you to receive external e-mail in your **Mailbox**. If you run MS-Outlook, you can transfer any messages received in that Inbox to your internal mailbox. To activate this option, flag the **Retrieve e-mail messages too** option. To save these messages in your external inbox (even after they were read), flag the **Leave messages** option as well.

In addition, the system allows you to avoid pop-up messages that are sent by Outlook to prevent viruses from spreading. To do so, flag the **Without Outlook security messages** option. This is particularly useful when you are sending the same message to hundreds of external addresses.

When using Outlook as your mail service, by default, outgoing mail messages opened from within a form (e.g., when sending a link to a record) or report will automatically open in Outlook. Flag the **Use Compose Mail form** option if you want these messages to open in the **Compose Mail** form in ***Priority*** (see p. 181).

Customer/Vendor Tasks

In addition, you can flag the **Record e-mail as customer/vendor tasks** option in this dialogue box to have each e-mail that you send to or receive from a customer or vendor recorded in the system as a marketing task, retrievable in the ***Tasks*** form.

Note: Depending on how the system is set up, this option may be disabled for all users in your user group or for all users in the system. Ask your system manager to change the **MAILCRM** system constant if you need access to this option.

Setting Up Mail Using Gmail

Click the **Options Menu** button, click **Mail** and select **Mail Options → Gmail → Mail Settings**.

Note: This program is also accessible from the **Office Management > Mail > Gmail Mail Options/Calendar Sync > Mail Options for Gmail** menu**.**

A new tab will open in your browser asking you to allow ***Priority*** access to your Gmail account. After clicking **Allow**, a window will open, displaying an access code to your account. Copy the code to your clipboard and return to ***Priority*** in your browser, where a dialogue box will open (see **Figure 98**).

Note: If you are not connected to your Gmail account on your workstation, you will be prompted to login before beginning.

In order to access your Gmail account, paste the access code that you copied in the previous step into the **Google Access Code** column. Also define the following settings:

- Flag the **Record Email as Task** option to have each e-mail that you send to a customer or vendor recorded in the system as a marketing task, retrievable in the **Tasks** form.

Note: Depending on how the system is set up, this option may be disabled for all users in your user group or for all users in the system. Ask your system manager to change the **MAILCRM** system constant if you need access to this option.

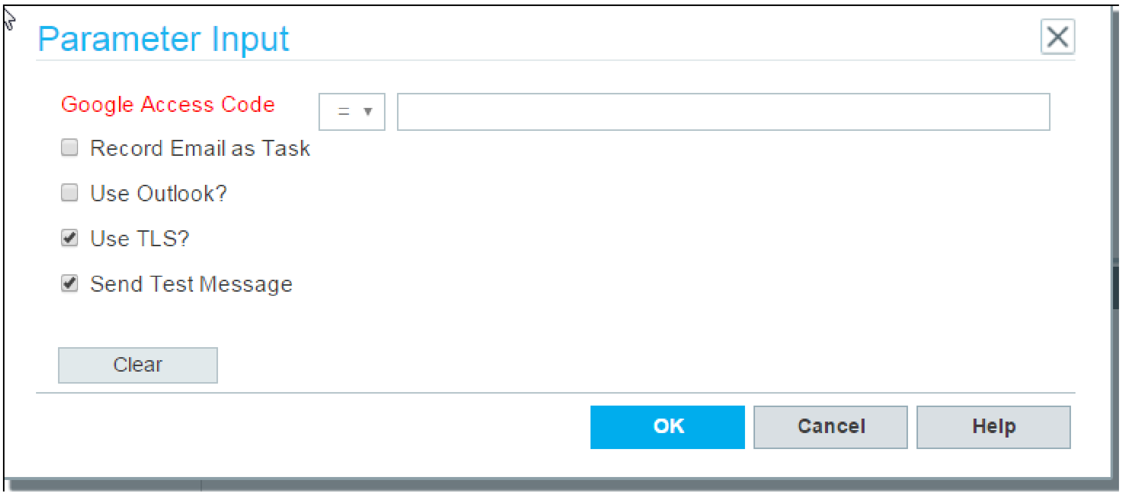


Figure 98: Setting up mail using the Gmail dialogue box

- Flag the **Use Outlook** option in order to send and receive Gmail messages using Outlook.

- Flag the **Send Test Message** option in order to have the system send a test message to the defined Gmail account.

Sending Mail Using Other Servers

Priority provides the option of sending mail using an SMTP server (e.g., Hotmail or Yahoo) rather than MS-Outlook or Gmail. To do so:

1. Click the **Options Menu** button, click **Mail** and select **Mail Options for Other Servers**.

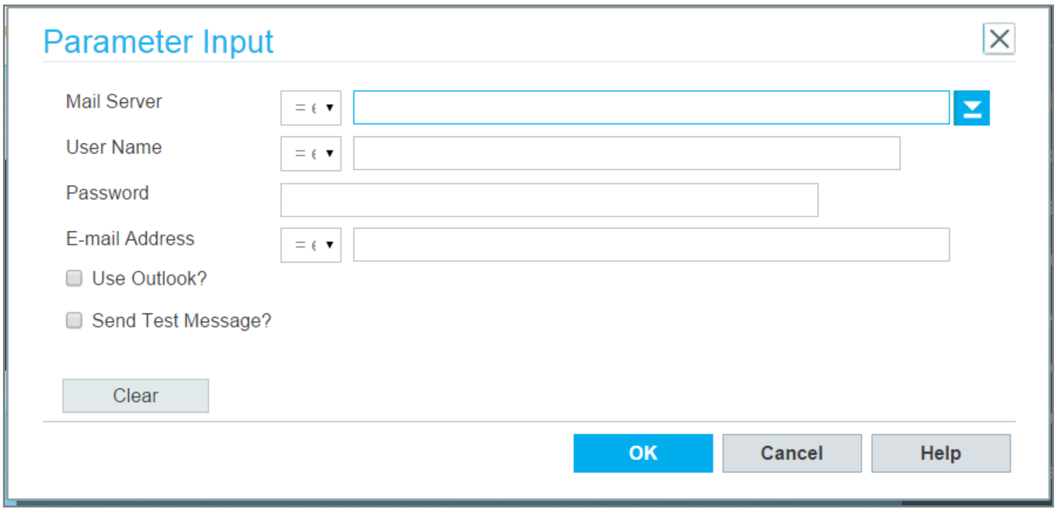


Figure 99: Set up mail using other servers

2. In the **Parameter Input** dialogue box, fill in the necessary definitions (see **Figure 99**).

From now on, all the user's external mail will be sent using the defined server.

Other E-mail Server Definitions

It is important to define whether you want to receive your internal mail solely in your ***Priority*** mailbox, solely in your external Inbox (e.g., MS-Outlook), or in both. These settings may only be performed by authorized users. To do so, they should perform the following for all employees that wish to use external mail:

1. To be performed by an employee with appropriate Human Resources permissions: Enter the personnel file in question (***Human Resources → Personnel File***), click the **Address & Phone** tab and make sure that the correct external e-mail address is recorded in the **E-mail** column.

2. To be performed by the system manager: Retrieve the record in question from the ***User Permissions*** form (***System Management → System Maintenance → Users***), and record one of the following values in the **Redirect E-mail** column:

   - Leave the column blank to use your mailbox exclusively.
   - Select **E** to route your internal mail to your external inbox.
   - Select **B** to receive your internal mail in both mailboxes.

E-Documents

E-documents are digitally signed documents (e.g., invoices and receipts) that are sent to designated customers (which have given approval for such) via e-mail, instead of printing and mailing them. ***Priority*** allows you to send digitally signed documents. Before you can send them, you must purchase a signing key from an authorized company. After you have purchased the key, run the ***Set Up PDF Document Signature*** program (***Office Management → Mail***). In the **Parameter Input** dialogue box, record the name and password of the PFX file that was purchased, or the certificate serial number and password. From now on, documents will be sent by the system with digital signatures.

To automatically send digitally signed documents (using defined mail settings):

- In the ***Financ. Parameters for Customers*** form, flag the **Receives e-Documents** column for the relevant customers.

Note: When sending a digitally signed PDF file, the file will be saved in the **Attachments** sub-level form of the relevant invoice.

Additional Contact Methods

Besides e-mail, ***Priority*** provides the following additional contact methods

- Dial a phone number (using Windows Phone Dialer)
- Dial a phone number or Skype account (using Skype)

Note: The relevant service or application must be active before you can use these contact methods.

To contact a third party from within a form, do **one** of the following, click the **Options Menu** button, click **Run** and select **Contact**, then choose the desired method of contact.

Alternatively, you can associate a Skype ID with a specific company or individual in the ***Set Up Skype*** sub-level of any of the following forms: ***Sales Representatives***, ***Customers***, ***Customer Contacts***, ***Leads***, ***Contacts***, ***Vendor Contacts***, ***Vendors***, ***Personnel File***. Subsequently, you can select the **Skype** command from the field containing that company or individual's identifying code in any ***Priority*** form.

Incoming Mail

Use the ***Mailbox*** form to read your mail messages. This is equivalent to the Inbox designation used in most e-mail applications.

The ***Mailbox*** form (**Figure 100**) may be accessed in several ways:

- Click the **Options Menu** button, click **Mail** and select **Mailbox**.
- Use the menu path: ***Office Management*** → ***Mail***.
- In addition, this form opens automatically whenever you authorize the pop-up message that notifies you of incoming mail.

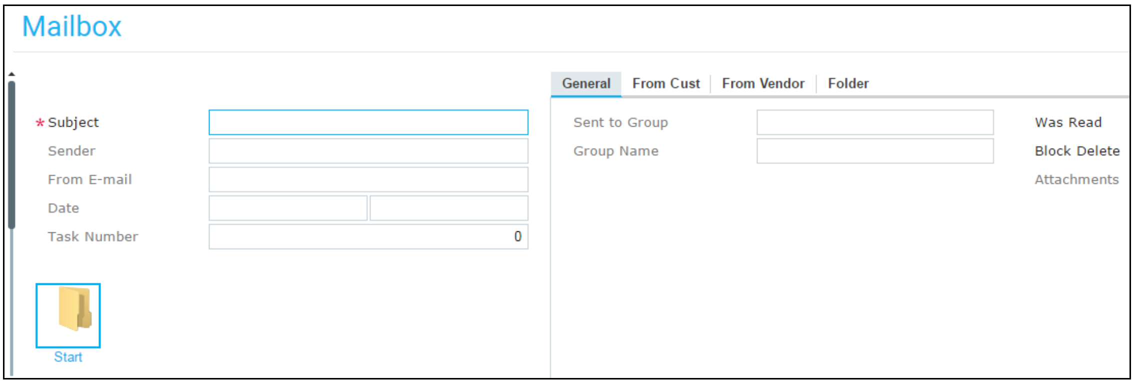


Figure 100: The *Mailbox* form

The subject of the message appears in the **Topic** column. The message itself is viewed in the sub-level form, ***Message***.

Other pertinent information regarding received mail is displayed in the remainder of the ***Mailbox*** form columns, e.g., the sender, the time, date and day of the week the message was sent, and so forth. If the mail was sent to all members of a group, the group will be displayed as well. (On defining groups, see p. 87.)

Once you have read an incoming message, flag the **Was Read** column (in the **General** tab). If you do not, the system will continue notifying you of incoming mail until you flag the column or delete the message.

Printing Received Mail

If you wish to print a given message, move to the record in question in the ***Mailbox*** form. Then run the ***Print Message*** report by direct activation.

Opening Attachments

If your mail includes an attachment, a check mark will appear in the **Attachments** column.

To view attachments:

1. Open the ***Attachments*** sub-level. Each attached file is displayed in a separate line of the form.

2. Move to the line representing the desired attachment.

3. To open the file, do **one** of the following:
   - Click the icon representing the attached file that appears to the right of the ***Attachments*** sub-level form.
   - Click the file icon that appears in the list of **Direct Activations**.
     Tip: If the attachment is an image file, hover the cursor over the magnifying glass to view a thumbnail.
   - Click the **Options Menu** button, click **File** and select **Open**.

Saving Attachments

To save an attached file to a location in your hard disk or network:

- Right-click the file icon (in the form or the list of **Direct Activations**) and select the **Save As** command.

Forwarding Messages

You can forward a received mail message to a third party by doing the following:

1. Enter the ***Forward Mail*** sub-level of the ***Mailbox*** form.

2. Specify the mail recipient (e.g., by username, external e-mail address; see p. 181 for details).

3. Record any desired remarks in the ***Message*** sub-level of the ***Forward Mail*** form.

4. Return to the ***Forward Mail*** form and run the ***Send Mail*** program by direct activation.

Replying to Mail Messages

There are two sub-level forms in which you can reply to received mail:

- ***Reply to Mail*** – the topic of the original message appears in the reply.

- ***Reply (Copy Original Message)* –** in addition, the original message is included in the body of the reply.

In both cases, the mechanism for replying to mail is identical:

1. Open the desired sub-level form.
2. A new message will be created, which you can later retrieve in the ***Compose Mail*** form. By default, the sender appears in the form as the designated recipient and the topic of the original message appears in the **Topic** column, preceded by “RE:”. However, both addressee and topic can be revised. You can also designate a third-party recipient in the ***Send Copies to:*** sub-level form.
3. Open the next sub-level form, ***Message***, and compose your reply.
4. If you want to include an attachment, use the ***Attachments*** sub-level form (see p. 182 for details).
5. Return to the reply form and select either ***Send Mail*** or ***Send Mail & Delete*** from the **Direct Activations** menu.

Note: You can also delete the reply by directly activating the ***Delete Message*** program from within the reply form.

Viewing Old Mail

As mentioned earlier, the ***Mailbox*** form opens and automatically retrieves all unread mail. However, you can also use Query mode or the Query Generator to find specific messages.

Example:

To view all mail received today:

1. Enter the ***Mailbox*** form and enter Query mode (press **F11**).
2. Press the minus key (**-**) in the **Date** column to retrieve today’s date.
3. Press **Enter**. All mail you received today will be retrieved. You can now scroll through the records by pressing **PgDn**/**PgUp**, or press **F4** to view them all together.
4. Enter the ***Message*** sub-level form to view the contents of each message.

Deleting Old Mail

Your system manager may periodically delete your old received items (e.g., anything dated more than a month ago may be deleted in a batch). You may, however, have old mail that you need to save. If that is the case, flag the **Block Delete** column of the ***Mailbox*** form for this particular message. No one will be able to delete this record until the flag is removed.

If you want, you can delete a batch of your old received items yourself. To do so, take the following steps:

1. Run the ***Empty Own Mailbox*** program, accessed from the ***Mail*** menu in the ***Office Management*** module.

2. Select **Received Mail** from the pop-up menu.

3. Specify the **Date** until which to delete all incoming mail, and click **OK**.

Any message received on or before that date will be erased. (Of course, any record flagged in the **Block Delete** column will not be affected.)

You can also delete individual received items yourself, by selecting ***Delete Message*** from the **Direct Activations** menu when in the ***Mailbox*** form.

Outgoing Messages

There are several options for sending mail messages:

- Sending single mail messages to individual system users (an intranet utility).

- Sending single messages to individuals who are not system users (i.e., via their Internet address).

- Sending an identical message to all members of a group.

In all of the above cases, you can also send a copy (cc:) or hidden copy (Bcc:) of the message to a third party (or group).

The steps for sending messages to an individual user and to a group are virtually identical:

1. Composing the message.

2. Designating the recipient(s).

3. Sending the message.

Composing Messages

Use the ***Compose Mail*** form to write outgoing messages (see **Figure 101**). This form may be accessed in several ways:

- Click the **Options Menu** button, click **Mail** and select **Send Mail**.
- Click the **E-mail** button next to the **E-mail Address** column in any form in which it appears. The address of the new message is filled in automatically.
- Use the menu path: ***Office Management*** → ***Mail***.

To compose an outgoing message:

1. Type the subject of your message in the highlighted **Subject** column. Alternatively, if the message is short, you can record it here. The date and time of the message appear automatically in the **Date** column.

2. Use the ***Message*** sub-level form to write your outgoing message. This form uses the HTML Text Editor (see p. 69).

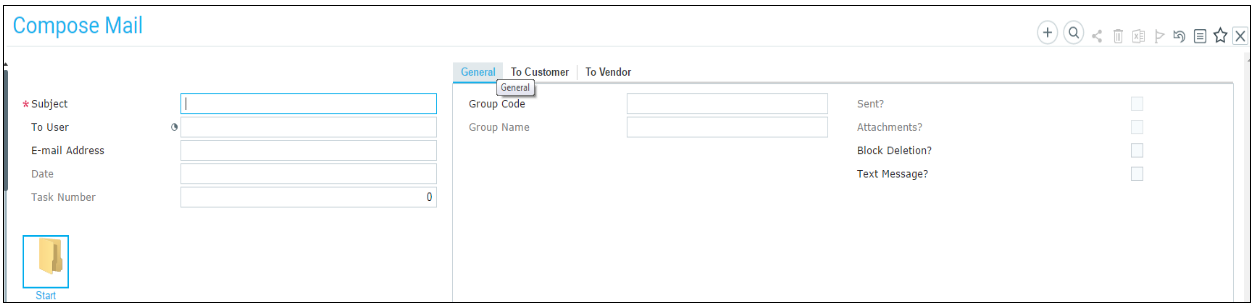


Figure 101: The *Compose Mail* form

Tip: You can copy an entity name, a link to the entity or its menu path by right-clicking the entity in the menu. You can then paste the results (**Ctrl+V**) directly into your mail message.

Addressing the Mail

Return to the ***Compose Mail*** form and indicate the recipient of the message:

- If the addressee is a system user (intranet), select the correct username from the Choose list in the **To User** column.
- If the recipient is a customer or vendor, record its number and e-mail address in the **To Customer** or **To Vendor** tab, respectively.

- If the recipient is not a system user, customer or vendor, fill in the **E-mail Address** column. You can use the Search list if the person in question appears in the ***Contacts*** form (see p. 185).
- To send the message to an entire group, click the **To Group** tab and designate its name in the **Group Name** column. (On defining groups, see p. 87.)
- To send copies of the message to a third party, enter the ***Send Copies to:*** sub-level form and indicate the party's username, e-mail address or group name (whichever is appropriate). In the **To/Cc/Bcc** column, use the Choose list to select the appropriate sending mode.

Creating an Attachment

You can attach any file (e.g., a Word document) to a mail message.

To add an attachment:

1. Do **one** of the following:
   - Click the folder icon.
   - Right-click the folder icon and select **Import**.
   - Click the **Options Menu** button, click **File** and select **Import**.
2. In the Explorer window that opens, select the desired file.

To attach additional files:

1. Move to the ***Attachments*** sub-level form and do one of the following:
   - Click the  button.
   - Click the folder icon in the list of **Direct Activations**.
   - Click the **Options Menu** button, click **File** and select **Import**.
2. In the Explorer window that opens, select the desired file. The full path of the attached file will now be displayed in the ***Attachments*** form.
3. Move to the next line and repeat for any additional attachments.

Sending Mail

Once you're ready to send the message, return to the ***Compose Mail*** form and do one of the following:

- Select ***Send Mail*** from the **Direct Activations** menu. A check mark will appear in the **Sent** column.
- Select ***Send Mail & Delete*** instead, to delete the message from the ***Compose Mail*** form as soon as it is sent.

If you forget to send a message, you will be notified when you try to exit the form. You can find the unsent message as follows:

1. Enter Multi-Record Display Mode (press **F4**).
2. Enter Query mode and type a minus sign in the **Date** column. Today's date will appear. Press **Enter**.
3. Look for a message with no check mark in the **Sent** column.
4. Send the message by direct activation.

Sending Record Links

When working in any of the system's forms, you can send a mail message that links to the record currently displayed.

To send the current record:

1. Do **one** of the following:
   - Click in the row of shortcuts and select **Send Record Link.**
   - In the Top Bar, open the **Mail** menu and select **Send Record Link**.
   - Press **Ctrl+S**.
2. A mail message is opened automatically, with the name of the form and the record's identifying number as the subject. The same information, including the link itself, appears in the message itself.
3. Send the message by direct activation.

Note: When using mail services other than MS-Outlook, ask your system manager to change the **GMAIL** system constant so that it will enable recipients to open the attached link.

Sending Task Links to Participants

When working in task forms, you can also send a mail message to all task participants that links to the task currently displayed.

To send the current task to participants:

1. Do **one** of the following:
   - Press **Ctrl+O**.

- Click the **Options Menu** button, click **Mail** and select **Send Link to Participants**.

2. A mail message is opened automatically, with the task's **Subject** and identifying number as the subject. The same information, including the link itself and any text recorded for the task in the ***Notes*** sub-level form, appears in the message itself. The message is addressed automatically to all participants defined for the task.

Viewing Old Outgoing Mail

You can view any messages you have composed (and not deleted) by entering Query mode and retrieving them.

Example:

To view all mail you have sent to a particular user:

1. Enter the ***Compose Mail*** form.
2. Enter Query mode (press **F11**).
3. Select the user's name from the Choose list in the **To User** column.
4. Press **Enter**. All mail you have addressed to this user will be retrieved. You can now scroll through the records by pressing **PgDn**/**PgUp**, or enter Multi-Record Display Mode (**F4**) to view them all together.
5. Enter the ***Message*** sub-level form to view the contents of each message.

Printing Outgoing Mail

If you wish to print a given outgoing message:

4. Retrieve the message in the ***Compose Mail*** form.
5. Select ***Print Message*** from the **Direct Activations** menu.

Deleting Old Outgoing Mail

Your system manager may periodically delete your old outgoing items (e.g., anything dated more than a month ago may be deleted in a batch). You may, however, have old mail that you need to save. If that is the case, flag the **Block Deletion** column of the ***Compose Mail*** form for this particular message. No one will be able to delete this record until the flag is removed.

If you want, you can delete a batch of old outgoing messages yourself. To do so, take the following steps:

1. Run the ***Empty Own Mailbox*** program, accessed from the ***Mail*** menu in the ***Office Management*** module.

2. Select **Sent Mail** from the pop-up menu.

3. Indicate the date up to which to delete mail and click **OK**. Any message composed on or before that date will be erased. (Of course, any record flagged in the **Block Deletion** column will not be affected.)

Creating E-mail Lists via the Contacts Form

The ***Contacts*** form in the ***Office Management*** module can be used to list persons with whom you maintain contact via Internet mail (i.e., non-system users). Although it is mainly used for recording a variety of phone numbers, it can also be used for e-mail addresses. By storing these addresses here, you will be able to retrieve them quickly from a Search list whenever necessary (i.e., in any **E-mail Address** column).

Note: There is no need to record e-mail addresses for system users (anyone appearing in the ***List of Users*** form), as mail is sent to them directly by username.

Priority on Outlook

Running Priority on Outlook

Introduction

With the proper license and setup, you can run ***Priority*** seamlessly on MS-Outlook by means of a variety of dashboards.

All parts of the dashboard are fully interactive. For example, you can navigate the menus, activate forms and display report data in various cross-sections.

For details on designing and using dashboards, see p. 106.

Note: Unless you are working from an SaaS installation, your system manager must install the ***Priority*** **on Outlook** module before you can begin. For instructions, download the appropriate installation document from the Downloads section of the **Customer Zone** on the ***Priority*** web site, at: http://www.priority-software.com/customer-zone.

Choosing the Dashboards to Display in Outlook

1. Run the ***Priority on Outlook*** program, accessed from the ***Priority on Outlook*** menu in the ***Office Management*** module.

2. Click the **Dashboards** tab and flag each dashboard that you want to be available in Outlook (see **Figure 102**).

3. Click the **BI Reports** tab and flag each report that you want to be available in Outlook.

4. Click the **CRM** tab and flag each item you want to include in Outlook.

Note: Every user is permitted to choose the screens that will be displayed in his/her personal Outlook. This choice does not affect the display of any other user in the system or the dashboards that are available in ***Priority*** menus.

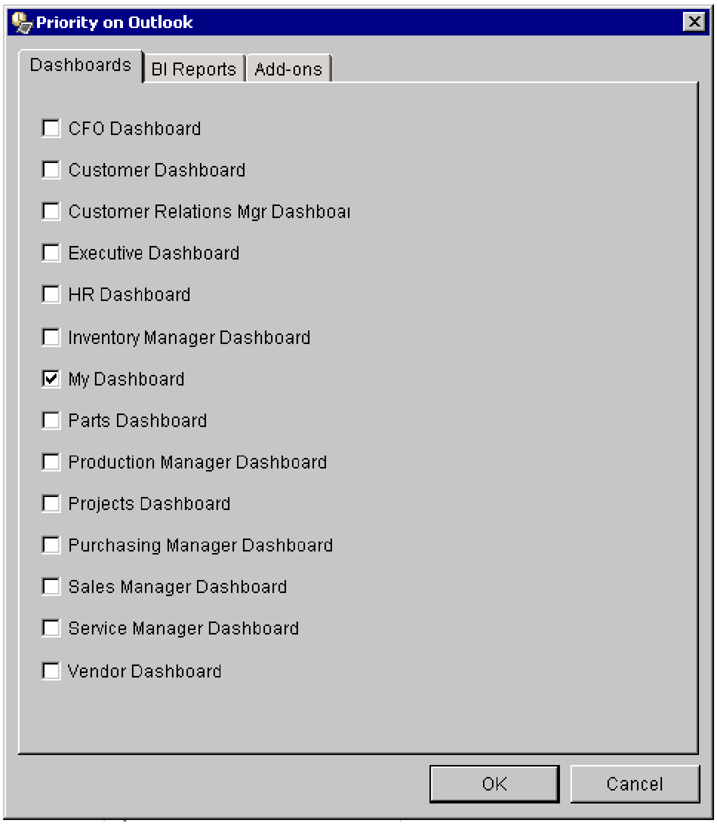


Figure 102: Selecting dashboards

Displaying the Dashboard

1. Enter Outlook and click the Shortcuts icon in the navigation window to the left, or press **Ctrl+7**.
   Tip: Shortcuts to the dashboards and BI reports that you chose appear under the titles **Priority Dashboards** and **Priority BI Reports**, respectively. If the symbol + appears to the right of one of these titles, click the symbol in order to display the shortcuts.

2. Click on one of the dashboards in the list. The dashboard will be displayed in the main area of the screen (see **Figure 103**).
   Note: The first time you work with Priority on Outlook, click on the User Dashboard and make sure the User Definitions window is visible. Use it to set up the data you will be viewing (e.g., to select a company).

3. In order to move from the upper to the lower part of the screen, use the vertical navigation bar to the right.

Tip: In order to display the dashboards in a wider window, press **Alt+F1** to close the navigation window to the left of the screen. To restore the navigation window, press **Alt+F1** again.

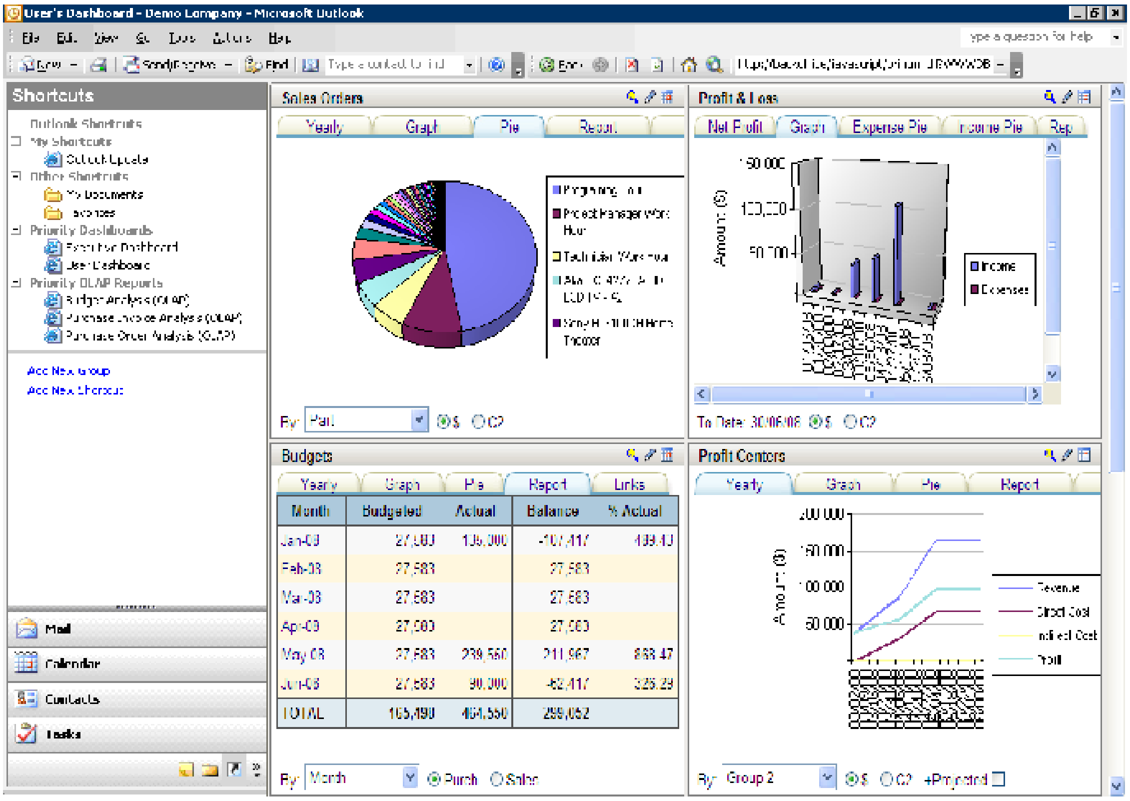


Figure 103: Displaying a dashboard

Appendices

Appendix A: Keys and Functions

Key	Function
Basic Keys	
Enter	Execute Move to next column
Esc	Exit/cancel
Ctrl+Enter	Open new line
Ctrl+Del	Delete record
F7	Clear the line (record)
F2	Scroll/edit mode
F4	Full/multiple record display
Navigational Keys	
Tab	Move to next column
Shift+Tab	Move to previous column
Shift+→	Move to next tab
Shift+←	Move to previous tab
Alt+→	Move to next sub-level
Alt+←	Move to previous sub-level
Ctrl+↓	Move to next form/menu
Ctrl+↑	Move to previous form/menu
Ctrl+`	Open the Options Menu
PgUp	Previous record/page
PgDn	Next record/page
Home	Edit mode: First char. in column Scroll mode: First field/column
Ctrl+Home	Move to first record
End	Edit mode: last char. in column Scroll mode: Last field/column
Ctrl+End	Move to last record
Ctrl+G	Go to line
Ctrl+F2	Change writing direction
Edit Keys	
Ins	Replace/insert
Del	Edit mode: Delete current character
Backspace	Delete previous character
Ctrl+U	Delete entire field
Ctrl+C	Copy
Ctrl+V	Paste
Ctrl+H	Copy entire column

Key	Function
Edit Keys (cont.)	
Ctrl+Y **OR** Ctrl+L	Copy record link
F8	When drilling down, return to form/input screen and paste current value
F10	Copy field from previous record
Ctrl+Z	Undo
+	Empty field: Default value Filled field: Increase value Next date/hour
-	Empty field: Default value Filled field: Decrease value Previous date/hour
Ctrl+F3	Search for value in this field
F3	Search again for value in this field
Ctrl+F9	Store into buffer
F9	Retrieve from buffer
Ctrl+F7	Clear the form
Shift	Expand column
Left-click form column title	Sort data by values in this column
Right-click form column title	Calculate column total (sum values)
Ctrl+F8	Calculate column total (sum values) up to current line
Action Keys	
F11	Move to Query mode
Shift+F11	Run Query Generator
Ctrl+0	Run the Query Generator's default query
Ctrl+1-9	Run up to nine saved form queries
F12	Enter default sub-level
Ctrl+F12	Enter default sub-level, but do not retrieve records (if text form, enter in read-only mode)
F5	Choose sub-level form
Key	**Function**

Key	Function
Action Keys (cont.)	
Ctrl+F5	Choose a Direct Activation
Ctrl+/	Run Enterprise search
Ctrl+]	Search for entity (form, report, program)
Ctrl+M **OR** Ctrl+F11	Update screen (refresh)
Alt+0-9	Run up to ten saved macros
Ctrl+Break	Stop action
Ctrl+S	Send record link – create mail message with current record link
Ctrl+O	Send link to participants – create mail message addressed to all task participants with current record link
Ctrl+[	Access to do list
Ctrl+B	Organize fields
Ctrl+I	Import file

Action Keys (cont.)	
Shift+F5	Choose sub-level form, but do not retrieve records (if text form, enter in read-only mode)
Right-click in form	Access context-sensitive menu
More Keys	
F1	Column help in form/input screen
Ctrl+F1	Form help
F6 **OR** Space key in blank column	Choose; search; activate form; select date
Ctrl+F6	Skip Choose list and go directly to search
Shift+F6	Open Explorer Report input: Open date calendar
Shift+Mouse	Select sequential Choose list items
Ctrl+Mouse	Select non-sequential Choose list items

Date Calendar

Key	Function
→ (right)	Move up one day
← (left)	Move back one day
↓ (down)	Move up one week
↑ (up)	Move back one week
PgUp	Move up one month
PgDn	Move back one month
Enter	Select displayed date
Esc	Exit calendar

Appendix B: Right Mouse Button Menu (Menus)

The following commands appear in a pop-up menu accessed by clicking the right mouse button from a menu entity (menu, form, report, program).

Help: View help text for the current entity.

Online Help: Accesses documentation from the ***Priority*** web site.

Design Report: Open the report design tool.

Design Spreadsheet Templates: Create templates for spreadsheets, into which report data can be loaded (active only for reports).

Copy: Copies the entity name.

Copy Shortcut: Copies the entity name with a hyperlink.

Copy Path: Copies the menu path that accesses the entity.

Open After Login: Open this entity automatically every time this user enters the system.

Design Menu: Determine the order in which entities appear in the menu.

Add to Favorites: Add this entity to the Favorites menu.

Add to Home Page: Add to the **Selected Entities** displayed on the Home Page.

Open in the Privilege Explorer: Open the Privilege Explorer, directly accessing privileges for this entity.

Change Font Size: Select the size of the menu font.

Add Document File: Include an external file (e.g., an MS-Word document) in the menu.

Delete Document File: Remove this external file from the menu.

Add User-Defined Report: System managers: Include a customized report, designed by a user, in the menu, so it is available to all users.

Delete User-Defined Report: Remove this customized report from the menu.

Appendix C: Options Menu (Home Page)

File

Select Company: Choose a different company.

Define Multiple Companies: Select companies for multi-company forms and consolidated reports.

Who Am I?: Display current user.

Change Password: Change your own user password.

User Signature: Customize your default comment and document printout formats.

Language: Switch to a different language (provided dictionaries are available).

File Explorer: Organize system files and folders.

Mail

Send Mail: Open form to compose outgoing mail message.

Mailbox: Open mailbox (inbox) to view/reply to incoming mail messages.

Check for New Messages: Check for new and/or unread mail in mailbox.

To Do List: View your list of assigned tasks.

To Do List History: View a history of assigned tasks.

Tracking List: View a list of documents that you are currently tracking.

Bulletin Board: View the latest postings on your company's ***Bulletin Board***.

Mail Options: Choose the user's mail service and define relevant mail settings.

- **Outlook**: Set up ***Priority*** to use Outlook.
  - **Mail Options**: Configure automatic notification of new/unread mail and appointment reminders.
  - **Synchronize with Outlook**: Set up and run interface between ***Priority*** and MS-Outlook.
  - **Priority on Outlook**: Run the program by which you define the Dashboards to display in MS-Outlook.
- **Gmail**: Set up ***Priority*** to use Gmail.
  - **Mail Settings**: Set up e-mail with Gmail.
  - **Calendar Sync Options**: Define settings for synchronizing your ***Priority*** and Gmail calendars.
  - **Synchronize Calendars**: Synchronize your ***Priority*** and Gmail calendars now.
- **Other Servers**: Set up ***Priority*** to use an SMTP server.

Design

Design Main Menu: Determine the order in which the root menus appear in the Main Menu.

Organize Favorites: Arrange entities in your Favorites menu.

Design Tool Tray: Determine the order of **Tool Tray** items**.**

Color Theme: Choose between a Light/Dark color theme in forms.

Run

Check Operating Speed: Check the speed of recent operations (used for debugging).

Search for Entity: Search by keyword for form/report/program and then run it.

Run Entity (Advanced): Advanced method for running applications (programmers only).

Help

Help Wizards: Access to all ***Priority*** wizards.

User Interface Guide: Access this Guide.

Keys and Functions: Access the table of shortcut keys to use for common actions (see **Appendix A**).

FAQs: Find and display Frequently Asked Questions (FAQs) by topic.

Learn Priority: Watch video clips explaining how to work with the system.

Priority Web Site: Direct access to the ***Priority*** web site (http://www.priority-software.com).

Online Support: Access to the **Customer Zone** on the ***Priority*** web site.

Priority Information Center: Open your personal inbox for messages from the ***Priority*** Information Center.

About Priority: System version and registration details.

Appendix D: Options Menu (in Form)

File

Who Am I?: Display current user.

Change Password: Change your own user password.

User Signature: Customize your default comment and document printout formats.

Select Company: Choose a different company.

Define Multiple Companies: Select companies for multi-company forms and consolidated reports.

Language: Switch to a different language (provided dictionaries are available).

File Explorer: Organize system files and folders.

Import: Open window from which to select a file (relevant in forms that include an attachment column, such as the ***Attachments*** form).

Open: Open file in current line (relevant in forms that include an attachment column, such as the ***Attachments*** form).

Send to Spreadsheet: Transfer displayed data to a spreadsheet file.
Note: The **SPREADSHEET** system constant determines whether data are sent to MS Excel or to your workstation's default spreadsheet (e.g., Open Office).

Send to Microsoft Word: Transfer displayed data to predefined Word template.

Exit Form: Exit current form (upper-level and sub-levels).

Mail

Send Mail: Open form to compose outgoing mail message.

Mailbox: Open mailbox (inbox) to view/reply to incoming mail messages.

Check for New Messages: Check for new and/or unread mail in mailbox.

Send Record Link: Open an e-mail that includes a link to the record currently displayed.

Send Link to Participants: In a task, open an e-mail addressed to all attendees that includes a link to the task currently displayed, as well as the notes recorded for the task.

To Do List: View your list of assigned tasks.

To Do List History: View a history of assigned tasks.

Tracking List: View a list of documents that you are currently tracking.

Bulletin Board: View the latest postings on your company's Bulletin Board.

Track Document: Start tracking the current document. When certain changes are made to the document, you will receive e-mail notification. Tracked documents may be retrieved in the **Tracking List** form.

Stop Tracking Document: Stop tracking the current record (once you have flagged it for tracking).

Mail Options: Choose the user's mail service and define relevant mail settings.

- **Outlook**: Set up ***Priority*** to use Outlook.
    - **Mail Options**: Configure automatic notification of new/unread mail and appointment reminders.
    - **Synchronize with Outlook**: Set up and run interface between ***Priority*** and MS-Outlook.
    - **Priority on Outlook**: Run the program by which you define the Dashboards to display in MS-Outlook.
- **Gmail**: Set up ***Priority*** to use Gmail.
    - **Mail Settings**: Set up e-mail with Gmail.
    - **Calendar Sync Options**: Define settings for synchronizing your ***Priority*** and Gmail calendars.
    - **Synchronize Calendars**: Synchronize your ***Priority*** and Gmail calendars now.
- **Other Servers**: Set up ***Priority*** to use an SMTP server.

Exchange Data: Transmit the current form data via the ***Priority*** Data Exchange.

Edit

New Line: Open new line.

Clear Line: Clear (hide) current line (does not remove record from database).

Delete Record: Remove record from database.

Clear Form: Clear form of all records, remaining in Data Entry mode (does not remove records from database).

Copy: Copy highlighted text.

Paste: Paste text.

Copy Record Link: Copy link to current record.

Store into Buffer: Store contents of field in which cursor rests into a buffer.

Retrieve from Buffer: Insert content stored in designated buffer into field in which cursor rests.

Copy Field Above: Clear anything currently in the field where cursor rests and copy to it the contents of the same field in the previous record.

Copy Column: Copy all values in current column.

Special Paste - Ignore Warnings: Paste text without displaying system warnings.

Store Records: Store all records in current sub-level form into buffer.

Retrieve Records: Retrieve all records stored in buffer and insert them in default sub-level form.

Sort: Sort all values in current column. Selecting this function once gives you an ascending sort; select again and the data will be sorted in descending order.

Expand: Temporarily expand width of field in which cursor rests, and leave column expanded until the root form is exited.

Default Value: Fill in default value (e.g., current date).

Scroll/Edit: Toggle between Scroll (move between columns) and Edit (move within column) modes.

Undo: Replace original text in current field, provided that cursor has not left line.

Sum Values: Total all values in column, from top of form to cursor, provided this is a number column (total appears in separate window).

Goto Line: Move cursor to designated line; indicate line number in pop-up window.

Search: Search for given pattern in current column.

Search Again: Search for next instance of pattern defined during last search.

Design

Organize Fields: Hide, rename and rearrange the form’s tabs and columns.

Organize Direct Activations: Determine the order in which direct activation options appear.

Organize Sub-levels: Determine the order in which sub-level forms appear as tabs underneath the form.

Restore Column Widths: Undo changes in column width performed manually (by dragging) in Multi-Record Display Mode.

Design Main Menu: Determine the order in which root menus appear in the Main Menu.

Organize Favorites: Arrange entities in your Favorites menu.

Record Color:

- **Define Record Color**: Determine the color of record values for this form, when a given field displays a predefined value or falls within a defined range of values.
- **Show Current Record Colors**: Display the color options which have been set for the fields in this form.

Change Font Size: Select the size of the form font.

Color Theme: Choose between a Light/Dark color theme in forms**.**

No Image Display: Display records without any attached images or icons (improves speed).

Business Rules Generator: Set up error, warning or e-mail messages that are triggered automatically when certain conditions are met.

Data Generator: Set up changes to the data recorded in the current form that are triggered automatically when certain conditions are met.

Spreadsheet Template Generator: Create templates from which to generate spreadsheets that display form data.

Word Document Generator: Design MS-Word templates from which to generate Word documents that display form data.

Label Generator: Create labels for the current form, using customized label types.

Highlight Mandatory/ReadOnly: Highlight mandatory and read-only columns.

Full/Multi-Record: Toggle between full display of all columns in a single record (Full-Record Display Mode) and display of multiple records (Multi-Record Display Mode).

Run

Query Generator: Define, save and run custom queries for the current form.

Query/Clear Form: Move into Query mode; clear all data in form.

Retrieve All Records: Retrieve all records in form, placing you in Data Entry mode.

Default Query: Execute the default query, as defined in the Query Generator.

Refresh: Update data displayed in form, based on recent record updates (updates generally result from changes made by another user after you retrieved data into form).

Direct Activations: Open menu of forms, reports and/or programs that can be activated from within the current form.

Sub-levels: Access menu of sub-level forms.

Default Sub-level: Open default sub-level form.

Search for Entity: Search by keyword for form/report/program and then run it.

Analysis Reports (BI): View a list of BI reports relevant to the form, which you can run in order to analyze data related to the current record.

Contact:

- **Skype**: Use Skype to dial a landline, cell phone or Skype account.
- **Dial**: Dial a phone number (using Windows Phone Dialer).

Calculator: Opens the Windows calculator.

Map: Display current address in Google Maps.

Macros:

- **Select a Macro**: View a list of macros (sequences of keystrokes and/or mouse actions) defined for the current form. You can then execute, delete or assign a hotkey to any of these macros.
- **Execute**: Choose and run macro.
- **Start Definition**: Begin defining new macro.
- **End Definition**: Select after you have finished defining macro.

Run Entity (Advanced): Advanced method for running applications (programmers only).

Check Operating Speed: Check the speed of recent operations (used for debugging).

Help

Quick Help: View a list of basic operations.

User Interface Guide: Access this Guide.

Keys and Functions: Access the table of shortcut keys to use for common actions (see **Appendix A**).

Learn Priority: Watch video clips explaining how to work with the system.

Column Help: View help text for column on which cursor rests.

Form Help: View help text for current form.

Help Wizards: Access to all ***Priority*** wizards.

Online Help: Accesses documentation from the ***Priority*** web site.

FAQs: Find and display Frequently Asked Questions (FAQs) by topic.

Priority Web Site: Direct access to the ***Priority*** web site (http://www.priority-software.com).

Online Support: Access to the **Customer Zone** on the ***Priority*** web site.

Priority Information Center: Open your personal inbox for messages from the ***Priority*** Information Center.

About Priority: System version and registration details.

Appendix E: Text Editor Toolbar

Set Text Color (**Ctrl+O**)

Cut (**Ctrl+X**)

Copy (**Ctrl+C**)

Paste (**Ctrl+V**)

Bold (**Ctrl+B**)

Italics (**Ctrl+I**)

Underline (**Ctrl+U**)

Undo (**Ctrl+Z**)

Increase Font Size (**Ctrl+E**)

Decrease Font Size (**Ctrl+D**)

Align Left (**Ctrl+L**)

Align Center (**Ctrl+M**)

Align Right (**Ctrl+R**)

Numbering (**Alt+N**)

Bullets (**Alt+B**)

Decrease Indent (**Ctrl+<**)

Increase Indent (**Ctrl+>**)

Horizontal Line (**Ctrl+H**)

Hyperlink (**Ctrl+Q**)

Picture (**Ctrl+P**)

Add a Comment (**Ctrl+K**)

Spelling (Ctrl+G)

Save (Ctrl+S)