

PRIORITY RELEASE NOTES V18.0

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HIGHLIGHTS

APPLICATION GENERATOR

- We are proud to present the new application generator used for accessing **Priority** via mobile devices.



- If you would like to find out more [click here](#)

PAYROLL, TIME & ATTENDANCE

REPORTING PROJECT HOURS

- You can view and revise project hour report data before it is loaded into the database in the new **Interim Table-Project Hour Repts** form.
- Employees can now use the **Confirm Own Project Hour Reports** program to confirm all the project hours they reported.
- The new **Job Site** column was added to the **Reports of Project Hrs/Expenses** form and to additional project reporting forms, allowing you to specify the place where the labor actually took place (e.g., on-site, off-site). You can list all relevant job sites in the new **Job Sites** form.
- The new **Billable Project Hrs** column, added to the **Project Hr. Reports-Work Area**, displays the total number of project hours reported for an employee on a given date.

TAXES

- The new **Income Tax Benefits** form allows you to view tax benefits awarded employees in specific pay slips.

ATTENDANCE APP

- The new app for attendance reporting can be used on tablets and mobile devices (currently available for Android and soon to be available for IOS). New additions to the system enable easy interfacing with the system. The new **GPSWorkHours** system constant (in the **Payroll Definitions** form) determines whether it is mandatory for employees recording attendance via an application on a mobile device to enable GPS satellite tracking.

ATTENDANCE REPORTING

- You can flag the new **Add'l Logins** column in the **Daily Reported Hours** form to indicate that more than two logins/logouts were recorded for an employee in a specific report.
- In the same form, the **Absence to Date** column displays the end date of the employee's leave of absence. You can also display an employee's work hour or absence reports on the online Attendance portal by flagging the **Display on Portal** column.
- The new **Define API Key for Google Maps** program allows you to install or delete a Google Maps API key. When working with the Attendance portal, this is used to track and save the user's street address at the time of his/her login and logout.

PAYROLL DEFINITIONS

- An employee's average monthly work hours is now displayed in the **Avg Wk Hrs in Month** column of the **Monthly Salaries** form. The new **AverageHoursCalc** payroll definition (in the **Payroll Definitions** form) determines how the average is calculated.
- The new **PartialVacationDays** payroll definition determines whether the annual quota of vacation days to which an employee is entitled will be rounded down to whole numbers or whether partial days will be allowed.
- The new **DaysToMakeChanges** payroll definition allows you to set the number of days within which you can make revisions to previous pay slips once they are finalised.

GENERAL

- Support was added for new payroll accounts in the **Payroll Accounts (cont.)** form, including accounts for employer disability expenses, employer severance pay expenses and more.
- You can now record a voluntary deduction payroll component against a voluntary deduction account in the **VoluntaryDeduct Acct** column of the **Payroll Data per Employee** form.
- New additions to the **Earnings and Deductions** report allow you to run the report by department, and to compare the report to the previous month.
- Flag the new **Record Holidays** input column when running the **Update Payroll/Financ.**
- **Constants** program to record the current year's holidays in the **Holidays (Office Closed)** form.

FINANCIALS

UPDATE WEIGHTS OF INDIRECT COSTS

Priority's new tool in the **Update Weights of Indirect Costs** menu allows you to automatically calculate weights for profit centres, which will be used to allocate indirect costs among them.

[For more click here](#)

BANK RECONCILIATION

- When running the **Finalize Reconciliation** program (by Direct Activation from the **Reconciliation Worksheet**), if all lines in the reconciliation are statement items without corresponding journal entry items, you can now choose whether to record a separate adjustment entry per line or one for all lines.
- You can cancel a bank reconciliation via the new **Cancel Reconciliation** program run by Direct Activation from the **Bank Statement Items** form or the **Itemized Statement** form (sub-level of the **Record Bank Statements** form).
- For more information, see [Bank Reconciliations](#).

ACCOUNTS RECEIVABLE AND ACCOUNTS PAYABLE

- You can now easily prepare receipts from within the **Multi-Shipment Invoices, Sales Invoices, Invoice Revisions** and (for non-US users) **Export Invoices** forms via the **Record a Receipt** program, run by Direct Activation. The program prepares receipts for payments made by check, cash or bank transfer. For more information, see [Multi-Shipment Invoices](#), [Sales Invoices](#) and [Recording an Export Invoice](#).
- The **Tax Exempt Income** column was added to the **Accounts for Customer Groups** form, allowing you to define a GL account for income from tax-exempt sales to customers in specific groups. The column was also added to the **Acc'ts for Cust Group in Family** form (sub-level of the **Accounts for Families** form).
- You can now run the **Prep Receipts for Standing Order** program for sales invoices (in addition to pro forma and multi-shipment invoices).
- Use the new **OneInvPerActDate** financial constant to prepare separate multi-shipment invoices for shipping documents whose dates fall in different fiscal periods.
- Use the new **ActPayTerms** financial constant to calculate payment terms (and the payment date) in multi-shipment invoices starting from the activity date (as opposed to the invoice date).
- You now have the option to **Prepare and Finalise** payments in one step in the **Prepare Payments** program.

GENERAL

- You can now track changes made to specific financial constants when running the **Changes to Financial Constants** report.
- In the **Balance Sheet, Trial Balance** and **Consolidated Balance Sheet** reports, you can now choose between a regular balance sheet, a schedule and a schedule that includes A/R and A/P details.
- The new **BlockProvEntries** financial constant allows you to prevent the posting of provisional entries to the ledger.
- The new **Part to Charge** column in the **Payments for Project** and **Payments for Project Order** forms allows you to record a specific part for a project payment that will appear on invoices (instead of the general "Project Payment" part number). For more information, see [Billing to a Project](#).
- The new **Acct Ledgers by Fin Statemt Item** report allows you to view account ledgers sorted by trial balance item or balance sheet/P&L item.

- The new **Budg in Effect Only** flag added to the **Budget Explorer** allows you to limit results to the budget items included in the budget version in effect.

US USERS: SUPPORT FOR NACHA

- You can now upload bank transfer payments via NACHA by using the items in the **NACHA Interface-Payables** menu.
- You can now bill customers for standing order payments via NACHA by using the items in the **NACHA Interface-Receivables** menu. [More...](#)

WAREHOUSE MANAGEMENT SYSTEM (WMS) AND OTHER FIELD MODULES

- You can now split pick tasks into several steps:
 - The **Intermed. Pick Bin** column was added to the **Storage Zones, Aisles in Storage Zone** and **Authorized Zones** forms, allowing you to record a default intermediate bin to which to pick parts temporarily until the last pick task.
 - When flagged, the **Last Task** column, added to the **Warehouse Tasks** form, indicates that this pick task is the last in a set of multiple pick tasks (or the only task in a regular pick task).
 - To open a set of multiple pick tasks, run the **Execute Next Pick Task** program by Direct
 - Activation from the **Warehouse Tasks** form to define the current task as one step in a
 - set of pick tasks. Once the task is completed and you have run the **Prepare Documents** program for it, another task will be opened for the next pick step.
- For more details, see [Working With Sets of Multiple Pick Tasks](#).
- The new **Master Pallets** form and its sub-level, **Pallets on Master Pallets**, allow you to define master pallets and to view details of pallets stored on each master pallet.
- In pick tasks, when picking by items, you can now display each order item on a separate line even when the part numbers are identical. To do so, select the **Sep. Part per Ord Ln** option in the input column of the **Create Pick Wave (by Part)** program.
- For more information, see [Picking by Part \(PIK\) Tasks](#).
- New field licenses in the **User Permissions** form:
 - The **Field Deliv Tracking** license enables users to work with the **Field Delivery Tracking** module.
 - The **API Field License** enables users to interface with **Priority** via a REST API through an external program.

SALES, PURCHASING AND INVENTORY

- **Report Generators:**
 - New columns in the **Sales Orders Report Generator** include start and end times, address details and territory code.
 - New columns in the **Transaction Report Generator** include the branch code and name.
 - New columns in the **Customer Invoice Rept Generator** and the **Purch Invoice Report Generator** include the budget item, transaction date and payment terms.
- When printing a shipping document or packing slip, the warehouse and bin from which the items were taken are now displayed.
- For your convenience, you can open a sales invoice or shipping document straight from the **Sales Orders** form via the new **Prepare Shipping Doc/Sales Inv** program.
- You can now manage versions of sales orders: To save the current version of the sales order and to open a new version, run the **Save Version** program by Direct Activation from the **Sales Orders** form. Use the **Sales Order Versions** form (sub-level of **Sales Orders**) to view previous versions of the sales order.
- The new **RoundPOrd** financial constant enables you to round prices in purchase documents.
- The new **Unbilled Docs by Branch** report allows you to view customer shipments and service calls that have not been billed, sorted by branch.
- By recording a value in the new **Required No. Crates** column in the **Assembly Reporting** form
 - (sub-level of **Warehouse Assembly**), the quantity of required parts will be calculated by
 - multiplying the number of required crates by the crate's capacity (provided that the **Required Qty** column is blank and the crate type is recorded in the adjacent column).
- The new **Inactive** column was added to the **Sources of Leads/Sales Opps** form. Sources flagged in this column will not appear in Choose lists and a warning message will appear if they are assigned to any lead or sales opportunity.

CUSTOMER SERVICE

SERVICE CALLS

- A new **Parts Used in Service Calls** form conveniently displays parts and quantities used for repairs or servicing during service calls. For instance, you can retrieve parts used in service calls for a given customer or parts handled by a given technician.
- The **Cutoff Response Hour** column, added to the **Catalogue of Parts w/Serial Nos.**, **Service Parameters for Part**, **Billing Details-Service Contract** and **Items in Contract** forms, allows you to define response times in service calls according to the time the call was placed.
- The **Mandatory End Date** column, added to the **Service Calls** and **Active Service Calls** forms, displays the date by which the service call must be completed. If this date has passed, the new **End Date Passed** column will be flagged automatically.
- When printing service calls, you can now select the **W/Extended Part Desc** format.
- For more information, see [Service Calls](#) and [Setting Up Customer Service](#).

GENERAL

- The **Serial'd Part/Contract Data Migr** interface supports migration of serialised part and service contract data from an external system to **Priority**. [More...](#)
- You can now track the history of customers that leased/bought a given serialised part via the

Customer Number and **Customer Name** columns added to the **Audit Trail for Serial**

Numbers form. In the case of purchased parts, vendor information is displayed in the **Vendor Number** and **Vendor Name** columns added to the form.

PROGRAMMING AND SYSTEM MAINTENANCE

- The new programming tool, **Web SDK**, allows you to develop new **Priority** interfaces with JavaScript.
- A new sub-level form, **History of Changes**, added to the **Define TTS Tasks** form, allows you to view changes made to tasks in the Tabula Task Scheduler.
- A new form, **Authorizatn for Employees by Co.**, allows you to select companies in which the user is authorized to view employee data. The user will only have access to records of employees when viewing data for these companies. To authorize a user to view employee data for all companies in the system, flag the **Employees in All Companies** column in the **Company-Specific Information** form (sub-level of the **Personnel File**).
- When the **PRIVUSERS** system constant is set to 1, the *tabula* (system manager) group will now have write privileges for the following columns in the **User Permissions** form: **Manage User Group**, **Manage All Users**, **Manage Companies**, **Manage Privileges** and **Run Upgrades** (up to now, only the *tabula* user could revise these columns).

MISCELLANEOUS

- US users will now record and view hours in the AM/PM format.
- Users of the **Compose Mail** form can now attach up to 500 files in the **Attachments** sub-level form.
- The new **FixFrozen** planning constant determines how to handle work orders frozen for planning (i.e., work orders flagged in the **Freeze Planning** column of the **Work Orders** form), when preparing a work plan via **MRP for Manufacturers**. [More...](#)
- **Priority** now supports sending text messages via a web service provided by an internal supplier.
- To this end, the following columns were added to the **Text Messaging Definitions** form:
 - **Windows User Name**, **Windows Password**, **Domain** and **SOAP Action**.
- UK users can now record the name of the state and county in the **States/Counties** sub-level of the **Countries** form. The state and county will then appear on printouts.
- The new **Country Settings** form (sub-level of the **Countries** form) allows you to turn customer and vendor bank codes into non-mandatory columns in all financial documents that include bank details, if your company is located in a country where bank codes are not recorded in the system.
- **Priority's** International (Dual-currency) installation has been combined with the American installation into one English language installation. Therefore, you no longer have to input the **Initialization Type** when running the **Add Company** program. Record the country in which your company is located instead.

MORE INFORMATION

APPLICATION GENERATOR

- Use the **Application Generator** form to define the app's name and language, and use the sublevel forms to define the forms and form columns that can be accessed via the app.
- To send the QR code required to use the app to users, run the **Send Link to App** program by Direct Activation from the **Application Generator** form. Users then scan the code into their mobile device.
- To update the definitions of an existing app, run the **Refresh Application** program by Direct Activation from the form and the update will be sent automatically to all app users.
- The apps created via the generator use an API. To use them, you must install an application server.
- Users must be defined as having an API license or an API field license (in the **User Permissions** form) in order to access **Priority** via the app.
- Updating records via an app uses up your quota of API transactions. You can run the **View License Details** report to view the number of API and interface transactions already used against your licensed quota.
- For more information, see [The Priority Application Generator](#).
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WEIGHTS

- The feature includes:
- A **Definition of Load Parameters** form in which to define parameters for loading data from external files, which contain specific types of costs (e.g., employees' phone bill data).
- A **Load File to Interim Table** program for loading indirect costs from an external file into the **Weight Calculation Interim Tbl** form.
- A **Check Validity of Data in Table** report to check the data loaded into the form.
- The **Clear Weight Calc Interim Table** program to delete data from the interim table.
- The **Update Weights by Sums** program, used to calculate weights for profit centres, based on sums recorded in the .interim table.

- You can also run the **Update Weights by Proj Reports** program to calculate weights of indirect costs based on the ratio of reported project hours. In this case, first fill in the **Employee Costs** form.
- For more information, see [Automatically Distributing Weights of Indirect Costs](#). [Back...](#)

SERIALISED PARTS AND CONTRACT DATA MIGRATION

Using the **Serial'd Part/Contract Data Migr** interface:

- You can define the way records are structured in the original data file in the **Load File Definitions** form.
- Use the **Load Ser. Parts/Contracts to Tbl** program to load service contract and serialised part data from an external data file into an interim table in the **Serialised Part/Contract Int Tbl** form.
- You can run the **Check Data in Interim Table** report to identify errors in data loaded into the interim table.
- Use the **Load Serialised Parts to DB** and **Load Contracts to Database** programs to load the data for serialised parts and service contracts from the interim table into the appropriate system forms. If errors are encountered during the loading process, the **Load Errors** report is produced automatically.
- You can run the **Clear Interim Table** program to delete all data from the interim table. [Back...](#)

NACHA

ACCOUNTS PAYABLE

- Use the **Flag Bank Transfers for NACHA** form to flag those transfers that you wish to upload via NACHA.
- In the **Bank Transfers to be Uploaded** report, you can view all bank transfers that will be included in the payment transfer file when the **Run NACHA Interface-Payables** program is run. The report will include all bank transfers flagged in the above form whose document and/or payment date falls within the specified report period.
- Use the **Run NACHA Interface-Payables** program to create the payment transfer file which can then be uploaded to NACHA. To view any bank transfers that could not be uploaded to the payment file, as well as the reason for the load failure, run the **NACHA Payables – Errors** report.

- You can use the **NACHA Transfers-Log of Changes** form to view revisions made to records in the **Flag Bank Transfers for NACHA** form.
- In the **History of NACHA Payables** report, you can track runs of the **Run NACHA InterfacePayables** program in a designated period.

ACCOUNTS RECEIVABLE

- Run the **Transfers for Upload-Receipts** report to view any receipts that have been prepared to collect standing order payments via an electronic interface, which have not yet been loaded to a file during the designated period.
- You can use the **Run NACHA Interface-Receipts** program to create a file of receipts for collection of standing order payments via NACHA . If any errors are encountered, you are referred to the **NACHA Receipts – Errors** report.
- In the **Revise NACHA Details-Receipts** form you can revise lines in receipts that failed to load when submitted via NACHA.
- Run the **History of NACHA Receipts** report to view details of any runs of the **Run NACHA Interface-Receipts** program in a designated period.
- For more information, see [Preparing NACHA Credit and Debit Payments](#).
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MISCELLANEOUS

If work order production has started, the **FixFrozen** planning constant allows you to shorten the duration of frozen work orders by changing the production start date in the work plan so that it reflects the time required to complete production of the work order. For more information, see [Running MRP for Manufacturers and Purchase Planning](#). [Back...](#)