PRIORITY RELEASE NOTES V18.2

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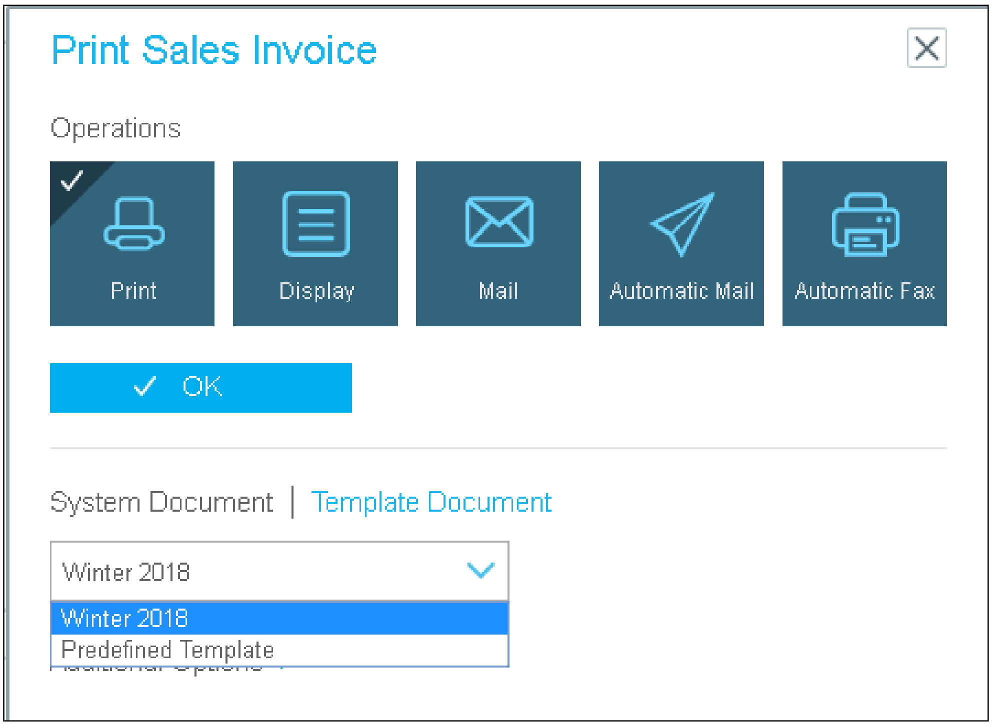
USER INTERFACE

WORD DOCUMENTS

You are probably familiar with the Word Document Generator, which allows you to export form data to Word documents via Word templates. Well, we have expanded this feature so you can also produce customised printouts for documents (e.g., order confirmations, invoices etc.) via the Word template design feature. See the User Interface Guide for more information. We have also included a predefined template for the most popular documents in the system. You can simply use it as is or copy it and customise it to fit your needs.



FINANCIALS

IMPROVEMENTS TO FINANCIALS

- The new Split Line Item program, run by Direct Activation from inventory documents such as Customer Shipments and Customer Returns, allows you to easily split the quantity of a line item in two, irrespective of the past balance so that the quantity in the new line appears in a separate financial document.

- Fixed assets – improvements to the mechanism for closing periods for depreciation calculations:
    - The Asset Group parameter was added to the Close Period for Deprec. Calcs. program, enabling you to limit the closing of fiscal periods in terms of asset depreciation to one or more asset groups.
    - Use the Closing Date-Accting and Closing Date-Taxes columns added to Fixed Asset Groups form to view the date until which depreciation calculations for accounting purposes or tax purposes (respectively) are closed for fixed assets in a specific asset group. These columns are automatically updated once the Close Period for Deprec. Calcs. program is run.
    - A History of Changes sub-level form was added to the Fixed Asset Groups form, displaying changes made in the upper-level form.
- It is now possible to create one or more numeration templates from which you can choose when recording new customers, vendors or GL accounts. These templates are defined in the Customer Templates, Vendor Templates and GL Accounts Templates forms, respectively.
- The new Calc. Project Revenue and Profit program, run by Direct Activation from the Revenue and Profit form (sub-level of Projects), allows you to calculate the projected revenue and profit of a project and all its sub-projects.
- A new Load Invs to Table-Tab Separated program allows you to load an external tab-separated file of invoices into the database.
- The new Reset Invoice Quantities to Zero program, run by Direct Activation from the Vendor Invoices form, allows you to reset the quantities of all lines in a pending invoice to zero (e.g., so you can delete the invoice).
- Preparing receipts just got easier! From now on, you can open a receipt directly from the Sales Orders form by running the new Record Receipt for Order program by Direct Activation.
- Use the new Link Packing Slips to Invoice sub-level form added to the Over-the-Counter Invoices form to view the packing crates that can potentially be

included in the invoice (i.e., that meet the defined conditions). The invoice will be itemised based on the packing slips flagged for inclusion and the crates will be listed in the new Packing Slips in Invoice sub-level form.

- UK Users: You can now submit your VAT return to HMRC via the online interface, by running the Submit VAT Return program. For more information, see SOP – UK VAT Report.
- Users in EU countries: Priority now supports the reverse charge tax scheme in which VAT on sales is declared by the customer on behalf of the vendor. For more information, click here.
- Users in Portugal: Priority now supports the latest SAFT standard.

PAYROLL, TIME AND ATTENDANCE

Currently for Israel Only

- It just got easier to record new employees in Priority! You can now fill in all employee information in one form, Payroll Data per Employee. Many columns were added to the form, and after entering employee data, a record is automatically opened for the user in the Personnel File.
- The new TaxOnSeverancePay payroll constant in the Payroll Definitions form allows you to determine whether taxes are to be paid on severance and retirement payments (generally depending on how and when these payments are made).

ATTENDANCE AND WORK HOUR CALCULATIONS

- From now, you can easily calculate monthly salaries for employees whose employment type is defined as Daily Wage. Assign the employee a pay class defined as daily wage and in the Payroll Data per Employee form, define the amount of the Daily Wage. The salary will be calculated by multiplying the number of days the employee worked in the month by his daily wage.
- The AbsenceCalc2 constant was added to the Payroll Definitions form allowing you to calculate eligibility for vacation and sick leave according to the percentage of the month the employee worked (as represented by the value in the new Part of Month (%) column in the Monthly Salaries

form.

- The new Outside Break-Start and Outside Break-End columns were added to the Work Hours & Shifts form (sub-level of Pay Classes) allowing you to define a break period outside of the workplace and to calculate an employee's break time accordingly.
- You can now define several logout times for a workday or shift via the Logout 2, Logout 3, and Logout 4 columns added to the Work Hours & Shifts form (sub-level of Pay Classes). These will be used to calculate payment for an employee's special logout times (for a permitted early exit or a paid late logout).
- Use the new Check Annual Vacation report to track employees who have not taken a specified number of consecutive vacation days.

SALES, PURCHASING AND INVENTORY

SALES

UNIT PRICES WITH TAX

- New developments in prices and price lists in Priority for customers who sell to end consumers! It is now possible to record unit prices with tax in sales documents, from price lists to invoices and everything in between. To support this, the following features were added:
  - The UnitPriceInclTax financial constant determines whether you record unit prices in sales documents with or without tax. You can revise this definition per customer or representative customer in the Unit Price w/Tax column in the Financ. Parameters for Customers form.
  - Unit Price w/Tax was added to the itemisation of Price Lists, Price Quotations for Customers, Product Bundles, Blanket Orders, Sales Orders, Customer Shipments/Returns, Service Calls and customer invoices.
  - The new Update Price w/Tax in Docs program updates unit prices with tax in existing sales-related documents (e.g., price lists, sales documents, service calls).

US USERS:

- Improvements to Priority's interface with ShipEngine! When running the Ship by ShipEngine program, the following options were added: You can now view price rates of optional shipping methods offered by the carrier for your shipment and select the desired method.
  - You can select the party to be charged for shipping fees (sender, customer or third party).
  - You can indicate whether you want shipping labels to be printed automatically. For more information, see SOP – Interfacing with ShipEngine.
- The State Code column was added to many forms in which addresses appear. Once you record the State Code, the state name is filled in automatically.

UK USERS

The new address lookup feature fills in customer or vendor addresses via their postcode and is available in most forms that include the Post Code column. For more information, see Sop: Address Lookup by Post Code – UK Users.

FASHION

- Use the new IPrintMatrix logistics constant to determine whether size columns with no items will appear in printouts of orders and invoices.
- The width of the Color Code column in the Colors (Fashion) form and the sizes in the Size Charts form were increased. To accommodate this, the Part No. Cutoff flag was added to the Part Specs Work Area to indicate whether a generated part number was cut off because it exceeded the maximum length.

MORE IMPROVEMENTS TO SALES

- You can now record set text for task codes that will appear automatically when opening a task with the relevant code. To support this, the Notes for Task Code sub-level form was added to the Task Codes form.

- All lines in an invoice or shipping document based on a sales order can now be approved automatically by setting the value of the new SOrdQuant logistics constant accordingly.
- The option of flagging a customer as Receives e-Documents is now possible in both the Customers form and the Financ. Parameters for Customers forms. By flagging the column in one form, the other form is automatically updated.
- The new Attachments sub-level form added to the Branches form allows you to attach documents relevant to the branch.
- The Status Duration column added to the History of Statuses form (sub-level of many system forms) displays the hours and parts of hours in which the document remained in a certain status and was assigned to a certain user.

PURCHASING

- Two new sub-level forms were added to the Purchase Order form: Documents Opened for Purch Order and Invoices Opened for Purch Order. The former displays all inventory transactions involving the items linked to the order, and the latter displays invoices for recorded parts appearing in the order, as well as credit/debit memos.
- The Total Planned Volume column added to Purchase Orders form, calculates the volume of the items in the purchase order. This is useful when planning the storage containers required.
- New columns were added to the Interim Table-Vendors form: Country, State. For users working in a non-English setting who produce English-language printouts, Street Address2, City/State (Lang2) were added as well.
- State was added to the Vendor Sites form (sub-level of Vendors).

INVENTORY

SERIAL NUMBERS

- Controlling inventory by serial number just got easier! The ISerialTrans logistics constant allows you to determine that opening serial numbers and updating data on serialised parts will only be allowed via an inventory transaction (and not in the Catalogue of Parts w/Serial Nos. form or by running the Open Serial Numbers program).

- When performing inventory counts, you can now use the Serial Numbers in Transaction form (sub-level of the Itemized Inventory Count form) to link individual serial numbers to counted parts or to open new serial numbers.
- The new Check Inventory by Serial Nos. report allows you to compare the quantity of serial numbers for parts (as defined in the Catalogue of Parts w/Serial Nos. form) against the quantity of inventory in the warehouse (as displayed in various inventory balance forms). The report compares serialised parts with the same attributes (i.e., warehouse, part number, status, work order/lot and pallet).

PARTS

- The Can be Shipped and Can be Received columns added to the Statuses for Parts form allow you to ship or receive parts that were already sold or ordered before their status was changed to a status that cannot be sold or ordered.
- Use the From Operatn/Pallet and To Operation/Pallet columns added to the Recent Inventory Transactions form (sub-level of the Part Catalog form) to view the operation executed on a partially processed part, preceding the transaction and in the current transaction, respectively, or to view the pallet on which the part was or will be stored.

INVENTORY TRANSACTIONS - SALES

- A new column, WkOrd/Lot Expir.Date, added to the Shipped Items form (sub-level of
Customer Shipments), displays the expiration date of the work order or lot.
- Use the new Set Text for Customer Returns form to record set text that will appear on all printed customer returns.
- You can now use the Shipped/Returned/Packed Items form to view lines in packing slips in addition to lines in customer shipments and customer returns.

INVENTORY TRANSACTIONS - PURCHASING

- The Invoices/Credit Memos for Doc sub-level form, added to the Goods Receiving Vouchers form displays all invoices in which the GRV was billed (including pending invoices).
- When recording a value in the Vendor's Invoice No input column added to the Prepare Multi- GRV Invoices program (run by Direct Activation from a GRV), the program opens one multi- GRV invoice for all lines in the GRV and automatically fills in the vendor's invoice number in the GRV itemisation.
- For your convenience, you can now open a GRV directly from a purchase order via the Open Goods Receiving Voucher program run by Direct Activation from the Purchase Orders form.

WAREHOUSE MANAGEMENT SYSTEM (WMS) AND OTHER FIELD MODULES

- You can now create issue to assembly tasks based on assembly documents via the Create Issue to Assembly Wave. For more information see: SOP - Issue to Assembly Tasks (WMS).
- New support for pick waves ending in an over-the-counter invoices:
    - The Shipping Pallet column was added to the Over-the-Counter Invoices form allowing you to record the number of the shipping pallet on which crates in the shipment are stacked in preparation for delivery.
    - The Pallet column was added to the Invoice Items form (sub-level of Over-the-Counter Invoices) allowing you to record the number of the shipping pallet on which items in the shipment are stacked in preparation for delivery. For more information see: SOP - Pick Tasks by Order (OTC Inv) (WMS).

When running the Create Pick Wave (by Order) program in which the Pick for Multiple Customers splitting method is selected, you can now choose between restricting the number of orders or the number of customers that can be included in a given pick task to the number of slots available in the transport type in question. To support this, the Slot Per column was added to the Cargo Transport Types form.

- A new step (25) was added to the Pick Algorithm form (sub-level of Pick Strategies), allowing you to determine that the system will recommend picking from bins that can meet the full demand before bins that provide only part of the quantity in demand.
- Support for recording serial numbers in inventory counts has been extended to WMS mobile device users.
- The Mobile Device Controller Log-WMS form and its sub-levels, allow you to view past task data loaded from a mobile device.
- The reason for the pick/put exception of the warehouse task item in a pick or put wave can now be viewed via the Reason Code and Reason columns added to the View Warehouse Task Items form.
- When updating service calls from a mobile device via the field technician app, you can now record the Call Type. To support this, the Call Type column was added to the Load From Mobile Device and Last Load From Mobile Device forms (sub-levels of Service Calls).
- The field service app now supports opening serial numbers and recording the service calltype.

CUSTOMER SERVICE

METERS

NEW CONSTANTS:

- The BillZeroContractSum financial constant allows you to determine whether payments for service contracts with a zero-sum that appear in the Payment Installments form will be included in invoices and will appear in invoice printouts.
- The CMeterTree logistics constant allows you to determine whether meters must be linked to a serialised parent part or whether they are an entity in their own right.
- The CMeterRead logistics constant determines how meter readings are recorded in the system (i.e., cumulatively or by the amount of pulses used in each period).
- The CMeterNoCharge logistics constant determines whether non-billable meter readings will appear in the meter section of invoice

printouts for service contracts that include meters.

- Use the new Yearly Bracket column added to the Service Contract form to determine that tiered pulse rates defined for meter pulses in a service contract will be applied annually and customer will be billed according to the annual bracket.

The new Currency column, added to the Meter Part Numbers (Pool) form (sub-level of Service Contracts and Sales Orders) allows you to record a currency for billing meter pulses that differs from the currency in the upper-level form.

MORE IMPROVEMENTS TO CUSTOMER SERVICE

- Two new columns, Warehouse and Warehouse Desc, were added to Servicing Report Generator.
- Use the new Location Log - Field Service sub-level form added to the Service Calls form to view the location of the technician updating the status of a service call from a mobile device.
- Improvements to the Prepare Servicing Plan program: From now, the program takes holidays and vacation days into account. If holidays and vacation days are defined in the system, service calls will not be scheduled on those days.

PRODUCTION

The Customer Name and Customer Number columns (read-only) added to the Work Orders and Sales Orders Tied to Work Order forms, enable customer information to be printed on labels based on these forms.

SYSTEM MAINTENANCE

- Improvements to the Tabula Task Scheduler:
    - In the Define TTS Tasks form, it is now easier to record the command. Just record the internal name of the procedure/report/document in the Procedure to Run column and the command will be filled in automatically.

- Use the Recipient Type-Msgs and the Message Recipient columns added to the More Parameters sub-level form, to record the type of user and the name of the user to receive the report or document. If the program is a document printout, use the Print Format column to select a print format for the document.

- Priority now enables using 3rd party identity providers when logging into the system! Advantages include:
  - Provides a Single Sign-On (SSO) experience for users in the organization.
  - Supports enterprise-grade authentication flows such as MFA and biometrics.
  - Integrates advanced security auditing such as Anomaly Detection into your application infrastructure.
- The Computer Name column added to the List of Recent Processes form, displays the network name of the computer on which the process ran or is running, and the PID column displays the Process ID.
- The View License Details report, which includes detailed information about the company's licenses, now includes a link to a document that explains the ins and outs of Priority licenses and the types of licenses available.
- The new FOLLOWAUTO system constant determines whether documents will be tracked automatically by their assigned user. In the web interface, this also impacts Priority Talk: The user will be added to the Priority Talk conversation (i.e., the document will appear in the user's notification box and he/she will be able to add and receive comments regarding the document).
- The new EXCELPASTESTOP system constant allows you to determine what happens when you are pasting data copied from Excel into a Priority form, and an error message appears.
- The Revised Entities form (sub-level of Installed Revisions) has a new sub-level form, Form Triggers Affected by Revise, which displays triggers that were added, revised or deleted in the revision.
- When working in a non-English work environment, use the new Company Name (Lang2) input column, in the Add Company and Add Company & Copy Basic Data programs to record the company's name in English. This name will then appear in the Company Data form and on English language printouts.

- It is now easier to retrieve active users in the system with the new Active User column added to the User Permissions forms (instead of the Inactive User column).
- Use the Form Interfaces-Errors form to easily retrieve errors encountered by the form load program.

PROGRAMMING AND MISCELLANEOUS

- It is now easier to analyse developments and troubleshoot problems in the system with enhanced debugging tools. When running a log with the -trc command, the log is organised chronologically by queries and results, and includes exact details of the runtime and other factors involved in the query. For more information, see Priority's SDK.
- Priority Master app's performance has been drastically improved by implementing React technology.
- We have made many enhancements to information security mechanisms making Priority more secure than ever!