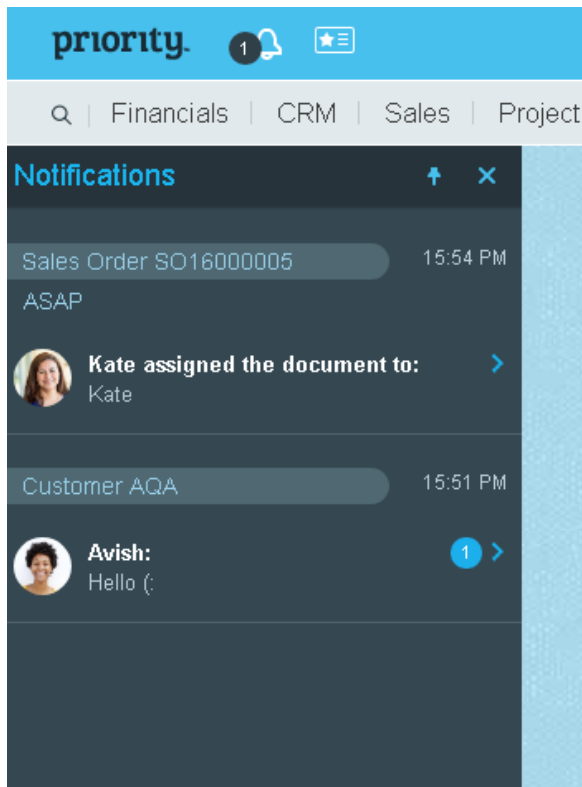


## Release Notes *Priority* 18.1

### Highlights

#### Priority Talk

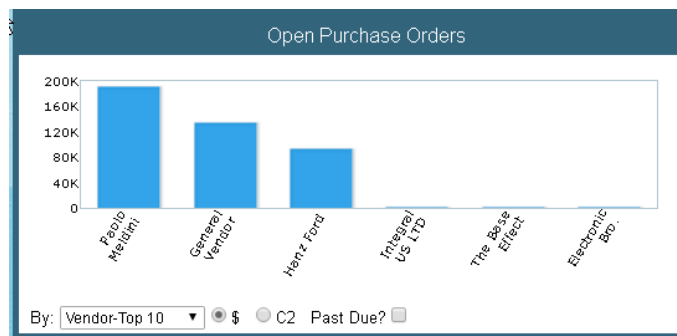
*Priority's* new internal collaboration tool allows you to communicate with colleagues across departments and share information regarding documents that you are tracking. [More ...](#)



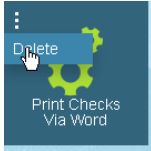
### User Interface

- New! Up-to-date data (e.g., open sales orders, open purchase orders, profit and loss) can now be graphically displayed in portlets on your home page, to help you focus on what matters.

[More...](#)



- To delete a home page tile, hover over the top right corner of the tile, click the three dots, then click **Delete**. This replaces the garbage can.



- The number of characters that can be saved in a buffer (**F9**) has been increased. Due to this change, values saved in a buffer before the system was upgraded to 18.1 must be resaved after the upgrade.

## Financials

### Accounts Payable

- Do your vendors use cash-based accounting? In the new **Link Payments to Invoice** form (sub-level of **Multi-GRV Invoices**), you can flag payments made to a vendor that works with cash-based accounting (i.e., sends pro forma invoices) in order to itemize the invoice. Once the invoice is finalized, it will be reconciled with the payments. For more information, see: [SOP – Cash Based Accounting \(Vendors\)](#).
- The new **Prepare Payments (No Invoice)** program allows you to automatically prepare multiple payment documents for equal payment installments to a vendor, unrelated to any invoice. Payments will be opened in either the **Check Payments** or the **Payments by Bank Transfer** form.

### Accounts Receivable

- Preparing invoices just got easier! From now on, you can open a sales invoice directly from the **Sales Orders** form by running the new **Prepare Sales Invoice** program by Direct Activation.
- Improvements to multi-shipment invoices:
  - The new **OpenInvPerOrder** financial constant allows you to determine which orders will be billed together when the **Prepare Invoices** program is run. [More...](#)
  - You can override the above definition for a specific customer in the **Prep Invoices by Ord** column in the **Financ. Parameters for Customers** form.
  - Columns were added to the **Unbilled/Uncredited Documents** form (which opens when the **Prepare Invoices** program is run):
    - **Billing Cust Number, Billing Cust Name** – allows you to bill orders that have the same billing customer together.

- **Customer's Purch Ord** – allows you to bill orders from the same original purchase order together.
- **US Users: Priority** now supports payments via Authorize.Net! You can use the Authorize.Net payment gateway to process individual online credit card payments from customers. [More...](#)

## General Ledger

- **US Users:** Use AmEx for your company expenses? With the new **Load American Express Statements** program, you can import your American Express statements into **Priority**. Statement items will be loaded into the **Record Bank/AmEx Statements** form, after which they can be reconciled with expense accounts.  
For more information, see [SOP - American Express Reconciliations](#).
- You can now define a fiscal period two weeks from the beginning or end of the month (as opposed to one week, which was previously allowed).
- When running the **Restore Canceled Reconciliations** program, use the new **How to Restore** column to choose between restoring reconciliations to the ledger (where they will be reconciled again), or loading them to the reconciliation worksheet where they can be revised.

## More Improvements to Financials

- Two new sub-levels were added to the **Financial Constants** form:
  - In the **Financ. Constants per Group/User** form you can customize the value of the **OneInvPerPrj** constant for specific groups or individuals when preparing multi-shipment/pro forma invoices for projects.
  - The **History of Changes** sub-level form allows you to keep track of changes made to constants.
- Wondering why there's a discrepancy in your cashier balance? Run the new **Check Cashier's Cash Balance** report to view problems that occurred when deposits to the specified cashier were made.
- **UK Users:** To set up and produce the VAT report for use in the UK, run the new **VAT Report – UK**. For more information, see [SOP – UK VAT Report](#).
- **EU Users:** Improvements to the Intrastat report: The **Terms of Delivery** column was added to the **Sales Order - Customer Details** form (sub-level of **Sales Orders**) indicating the code of the delivery terms used in the shipment of goods. [More...](#)
- **French Users:** You can use the new **Include Opening Bals** column, when running the **Create FEC File**, to include the opening balances of all accounts in the system in addition to journal entries.

## Warehouse Management System (WMS)

- Improvements to the **Create Put Wave (by Inventory)** program:
  - Use the new **Split Task by Pallet** input column to split putaway tasks for different pallets included in the wave (so that each pallet will appear in a separate task).
  - Use the new **Put Priority** column in the **Flag Inventory** form (that opens when the program is run) to indicate the relative importance to be assigned to putting away inventory of a particular line.
- When running the **Create Pick Wave (by Order)** program, you can now pick a group of order items together in one pick task. By assigning an identical number to each order item in the group in the **Group for Picking** column in the **Order Work Area** or **Flag Open Order Items** form, the system will only include lines with the same number in the same pick task.
- Not sure why a warehouse task was split? The reason for the splitting is now displayed in the **Task Split-Reason** column in the **Warehouse Tasks** and in the **Warehs Tasks That Were Created** forms.
- When running the **Create Inventory Count Wave** program, you can now limit the warehouse tasks created to parts not counted from a specific date, as designated in the **Not Counted Since** input column.
- In the **Reasons for Pick/Put Exceptions** form, the new **No Inventory** column allows you to indicate that a pick task was not completed due to insufficient inventory. [More...](#)
- New for Fashion module users: The new **Split Sets** column in the **Task Splitting Methods** form allows you to create separate warehouse tasks for each fashion set (i.e., the same lot + style + color) when creating a pick by order wave.
- The maximum number of tasks that can be included in a wave was increased to 999,999 (instead of 9,999).
- Your time is valuable! We've made many behind-the-scenes changes to speed up pick and replenishment waves.

## Sales, Purchasing and Inventory

### Customer Shipments

- **US users: Priority** now integrates with ShipStation to ship goods via shipping carriers such as UPS, FedEx and many others. Data from shipping documents in **Priority** are transferred to carriers via ShipStation. In response, tracking numbers and labels are recorded in the shipping document. For more information, see [SOP – Interfacing with ShipStation](#).

- It just got easier to open customer shipments. You can run the **Prepare Shipping Document** program by Direct Activation straight from the **Sales Orders** form.
- **Invoices for Document**, a new sub-level of the **Customer Shipments** form, displays all the invoices in which the shipping document was billed.

## Canceling Documents and Authorizations

- Many documents can now be cancelled by Direct Activation straight from the form. Run the **Cancel Document** program from the **Customer Shipments, Customer Returns, Goods Receiving Vouchers, Returns to Vendors** and **Inventory Count** forms. Run the **Cancel Sales Order** program from the **Sales Orders** form.
- In the **Purchase Orders** form, you can now automatically cancel all existing authorizations of an order via the **Cancel Round of Auth** flag added to the **Statuses for Purchase Orders** form.

## More Improvements to Sales, Purchasing and Inventory

- Two new sub-levels were added to the **Sales Orders** form: **Documents Opened for the Order** and **Purchase Orders for Sales Order**. These forms display the sales, purchasing and financial documents opened for the order's items
- The new **Customer Sites** form displays the addresses of all customer sites and also allows you to record new ones.
- The new **OnLineSnTree** logistics constant allows you to determine whether, when recording serial numbers for inventory transactions, links between parent and child parts will be updated as soon as you leave the form in which they are recorded or only when you enter the **Serialized Components of Part** form (sub-level of the **Catalogue of Parts w/Serial Nos.** form).
- Use the new **Free Text** and **Free Text 2** columns in the **Serial Numbers in Transaction** form to record brief details that can be used to retrieve the serialized part in the **Catalogue of Parts w/Serial Nos.** form.
- Automatic calculations of bonuses were added to the **Price Quotations for Customers, Over-the-Counter Invoices** and **Sales Invoices** forms. You can block automatic calculation of bonuses in specific documents via the new **Ignore Bonuses** flag. For more information, see: [SOP - Bonuses](#).
- You can designate the hours during which a branch operates in the new **Work Hours at Branch** form (sub-level of the **Branches** form).

## Payroll, Time and Attendance

- It's now easier to calculate employee convalescence pay with the new columns added to the **Payroll Data per Employee** and **Monthly Salaries** forms.
- The new **Tax Credits per Date** form (sub-level of **Tax Benefits**, itself a sub-level of **Payroll Data per Employee**) allows you to view past values of a given tax credit.
- You can now run the **Fund Payments** report for employees in a specific **Department** or for a **Subsidiary**.
- Use the new **Check Salaries** report to check for problems with salaries (e.g., missing records).
- A new **Tab-Delimited** column was added to the **Define Pay Report Load Params** form, allowing you to indicate that the file loaded from an external program is tab-delimited.
- Use the new **Magnetic Card No.** column in the **Payroll Reporting Interim Table** to record the magnetic card number of the employee for which the report was recorded (and the **Magnetic Card No. 2** if he/she reports to two different companies).
- An **Attachments** sub-level form was added to the **Payroll Reminders** form, allowing you to attach documents relevant to the reminder. A check mark in the new **Attachments** column in the upper-level form indicates that attachments have been uploaded.
- The **Additional Reports** sub-level form was added to the **Batch Payroll Reporting** form, allowing you to easily record payroll reports for the salary in the upper-level form. You can only make payroll reports for payroll components defined as included in the **Short Choose List** in the **Payroll Components** form.
- You can now run the **Payroll Entries** report by department (instead of by employee).
- Columns were added to the **Interim Table-Employees** form, along with a new sub-level, **Employee's Children-Details**.

## Customer Service

### Service Contracts

- The **Site** column was added to the **Service Contracts** form, allowing you to define a site for a specific contract. When invoices are prepared for the contract, the site address will appear as the address in the invoice.

### Meters

- The new Meters module provides full management of serialized parts that include meters (e.g., photocopiers). The module enables you to open service contracts for the parts, manage meter

readings, bill customers and open payments. The module includes new entities and expanded functionality in the **Service Contracts** and **Service Calls** menus. [More...](#)

## System Maintenance

- The **Recent Processes** sub-level form was added to the **Define TTS Tasks** form, enabling you to view information pertaining to recent activations of tasks run by the Tabula Task Scheduler.
- Data migration: The following columns were added to the **Interim Table-Customers** form: **Cash Flow Code**, **Bk Acc for Cash Flow**, **Omit From Cash Flow** and **Customer Category 11-20**.
- You can now define a time zone for a company in the **Companies** form. Once the time zone has been recorded, signatures in the **History of Statuses** forms will be displayed according to the company's time zone. In the web interface, the time displayed will be according to the user's time zone.





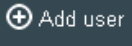

## Programming


- Attention Programmers! **Priority's** new developer portal includes detailed information on how to use the new **Web SDK** that communicates with **Priority** entities, as well as how to use **Priority's REST API**. Click <https://prioritysoftware.github.io>.
- REST now supports the \$select and \$expand commands, as well as complex queries with multiple commands.
- A new development library, **Priority Ionic**, makes it easier to build mobile applications using the Web SDK.
- Support was added for JSON.
- New app generator functionality! You can now add procedures run by Direct Activation from forms to the app (available for procedures without input). For more information, see: [Priority Application Generator](#).
- Improvements to the **Priority Master** app for smart phones: You can now choose the company in which you're working from within the app.
- When defining an app, in the **Form Columns** form (sub-level of **Forms in Application**, itself a sub-level of the **Application Generator** form), use the **Type** column to choose special functionality available in the column. Choose **B** to fill in the column with a barcode scanner or **P** to call the phone number appearing in the column by pressing the phone icon.

## More Information

### User Interface


#### Priority Talk

- This new feature keeps you informed about documents that you're tracking. You will receive a notification when the document's assigned user or status changes or when a new comment is added to its internal dialogue.
- To add a document to your chat box (i.e., to flag it for tracking), retrieve the document and click the  icon on the list of shortcuts. You can add other users to the conversation by clicking the  icon on the row of shortcuts.
- Click the bell icon (next to the Favorites menu button) to open the chat that displays the documents that you're tracking. The number of new notifications waiting for you is displayed on the bell .
- Click the name and number of the document in order to open it.
- To add a comment to the conversation, click the arrow next to the document in question in the **Notifications** box. The chat box will open, displaying the history of notifications and a text box for comments.
- To see who else is tracking the document, click the  icon on the top right.
- Another way to add users to your chat is by clicking the  icon in the **Chat details** box.
- To stop tracking the document, click the  icon under the list of users.

**Note:** The chat does not take into account documents that were marked for tracking before version 18.1. In order to receive notifications for these records, enter the **Tracking List** form and move to the document(s) in question. Press **F6** to access the document. Click the  icon on the row of shortcuts to remove the tracking and then click it again to restart tracking.

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#### Portlets

- To add a portlet to the home page, click the  icon on the upper-right side of the home page, and choose the desired topic in the window that opens.

**Note:** For your convenience, the **Portlets** menu was added under the **Executive Reports**



menu, enabling you to assign user privileges for portlets. Additionally, you must have the BI module installed in order to display portlets on your home page.

- Hover with your mouse over the upper-left corner of the portlet and then click the three dots that appear. Choose one of the following options:
  - Select **Choose Dates** to select the period for which to display the data.
  - Select **Open in New Window** to open the portlet in a window outside of the home page.
  - Select **Delete** to delete the portlet from your home page.
- Run the **Prep for Inv. Analysis (BI)** program (for customer and for purchase invoices) on a daily basis to update the data displayed on portlets for invoices (the programs can be run at fixed times via the Tabula Task Scheduler). All other portlets are updated automatically.

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## Financials

### Accounts Receivable

- The **OpenInvPerOrder** constant allows you to prepare one invoice for all the customer's sales orders, prepare a separate invoice for each sales order or prepare a separate invoice for all sales orders that share the same **Cust's PO**.

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- Authorize.Net: The new **Interface with Authorize.Net** menu includes the following entities:
  - A **Clearing Methods** form for recording the clearing methods used to process credit card payments via payment gateways such as Authorize.Net.
  - A **Setup for Authorize.Net** program for setting up definitions.
  - An **Approve Authorize.Net Transact'n** program, run by Direct Activation from the **Other Forms of Payment** form (sub-level of **Over-the-Counter Invoices** and **Receipts**), used to send credit card transactions to Authorize.Net.

For more information, see [SOP-Processing Credit Cd Paymts w/Authorize.Net](#).

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### More Improvements to Financials

- Intrastat: The **Terms of Delivery** in the sales order are filled in automatically with the code assigned to the customer in the **Financ. Parameters for Customers** form, but may be revised. **Terms of Delivery** in the report itself are taken from the customer shipment or sales invoice, and when that is unavailable, from the sales order or the customer details.

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## WMS

- When a pick exception reason flagged for **No Inventory** is reported on a mobile device, the other open tasks that have not yet been reported (that include inventory from the same warehouse, bin, pallet, part, and work order) will also be filled in with the same reason. This is to prevent other pickers assigned to these tasks from trying to pick from that bin.

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## Customer Service

### Meters

- The items in the new **Meter Readings** menu allow you to prepare, record and view meter readings for serialized parts.
  - Use the **Meter Readings** form to view and record meter readings.
  - To calculate the meter count average for a specific period, run the **Calculate Average Meter Count** program.
  - Run the **Check Meter Readings by Contract** report to view contracts with meter readings that have not yet been billed.
- The **View Meter Readings** sub-level form was added to the **Service Calls, Catalogue of Parts w/Serial Nos. and Items in Contract** (sub-level of **Service Contracts**) forms. This form allows you to view meter readings for the serialized part in the upper-level form.
- You can record and view billing details for a given order item or contract item.
- Printouts of multi-shipment invoices for meters include details of the meter readings for which the customer was billed.
- Columns were added to the **Items in Contract** form (sub-level of the **Service Contracts** form): **Months to Bill, End-Leasing Payments** and **Active Lease**. Use these columns when the customer is leasing the part.

For more information, see [SOP - Working with Meters](#).

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