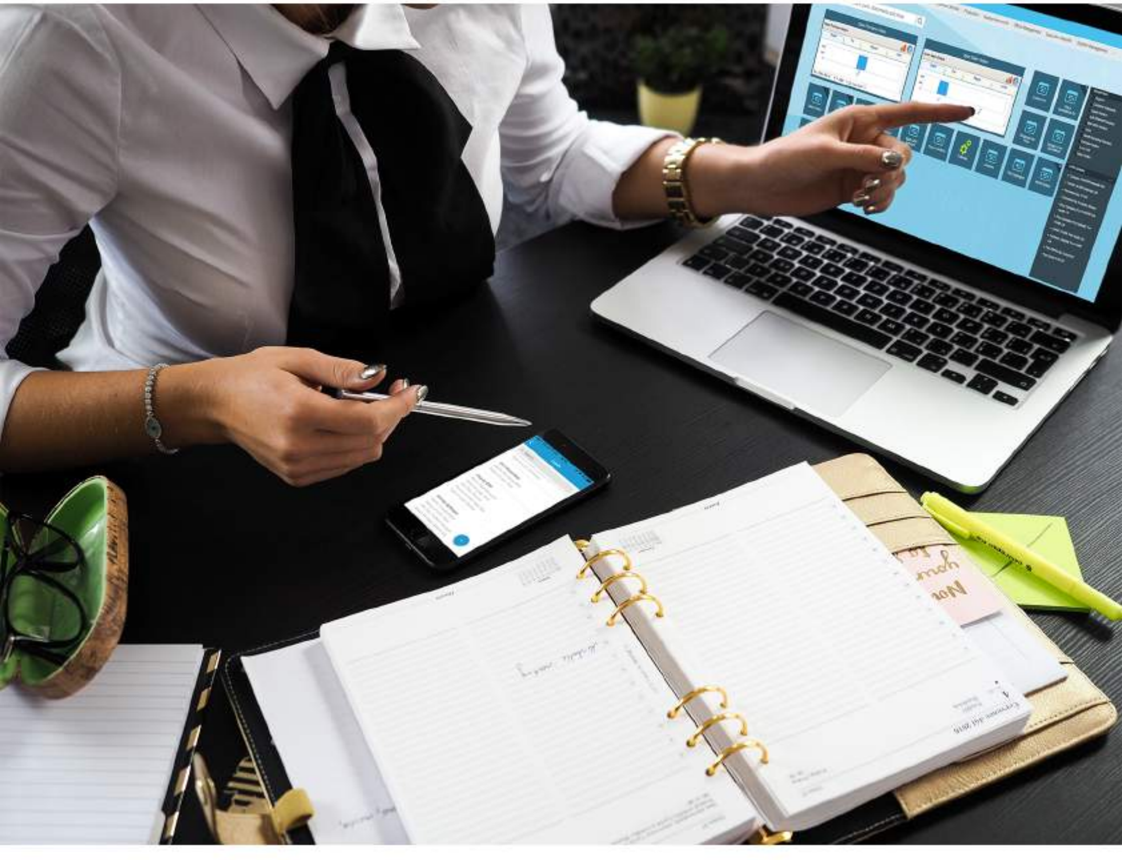
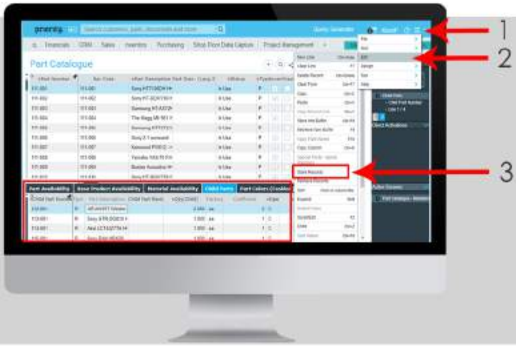
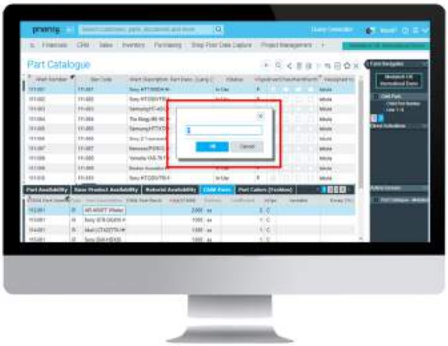
Priority Advanced Hints & Tips

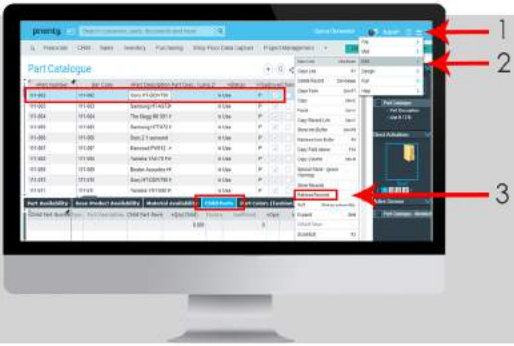




1. Retrieve all **records** in sublevel which you would like to copy
2. Make sure you are in **sublevel** and one of the **records** is highlighted
3. Priority will copy all **records** which are in given **subform**, not only the highlighted one
4. If you wish to copy only some of them, you need to hide others using **F7**
5. Click on , then "**Edit**" and "**Store Records**"



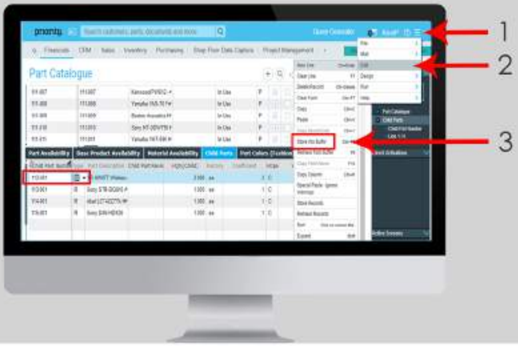
6. Priority can store multiple sets of **records**. Pick a number for this set and click "OK"
7. Priority as default uses consecutive numbersstarting from 1



8. Retrieve and highlight the **record** which you would like to have your copied **records** pasted for.
9. Make sure that you can see the **sub-level** where records will be passed.
10. Make sure that you are **not** in **sub-level**, your **cursor** must be highlighting top level record.
11. Click on , then "**Edit**" and "**Retrieve Records**"

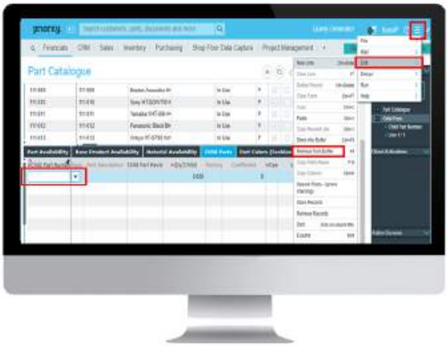
12. Choose the copied **records** set number and press "OK"
13. **Records** will appear in **sublevel**

Copy & Pasting Whole Records - Copy single/multiple records from one subform to another. Subforms structure must be identical and only non hidden fields will be copied. Works only for sublevels and pastes only one level.

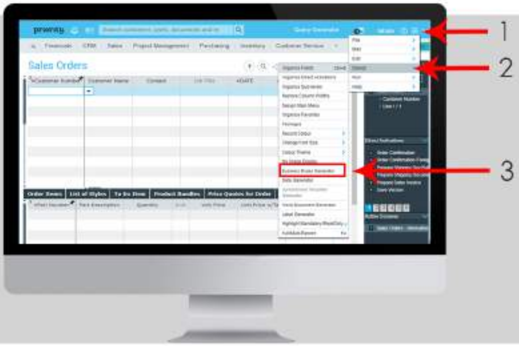


1. Highlight a **field** you wish to copy
2. Click ≡ , then "**Edit**" and "**Store into Buffer**" or press **CTRL + F9**
3. A new window will pop out, type in the number you would like to have your copied data stored under and click "OK"
4. Priority will suggest the last used number + 1
5. Repeat the process until you **store into buffer** all **fields** you wish to copy

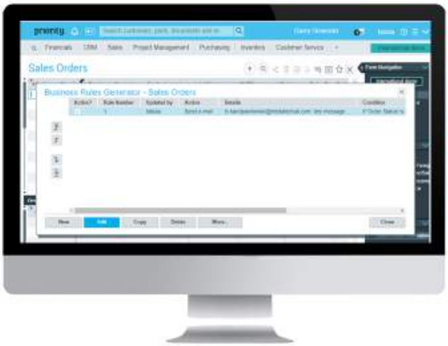
7. Highlight **field** where you would like to paste stored data (it doesn't have to be empty)
8. Click ≡ , then "**Edit**" and "**Retrieve from Buffer**" or press **F9**
9. The same window will pop out, type buffer number associated with required data and press "OK"
10. Priority will suggest the last pasted number + 1
11. Value is pasted in highlighted **field**
12. Repeat the process until you paste all data from buffer



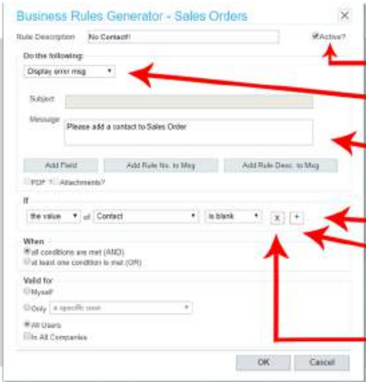
Storing into Buffer - Copy a number of fields and then paste them without doing it one by one. User can retrieve from buffer only one field at a time. Better version of CTRL + C and CTRL + V Shortcut to copy is CTRL + F9 and shortcut to paste is F9.



1. Make sure the **form** you want to create a business rule is active
2. Click , then "**Design**" and "**Business Rules Generator**"



3. You can pick an already existing **rule** and **edit** it, **copy** or **delete**
4. By pressing "**More**" you can search for a **rule** using **keyword** or **run** a **report** with summary
5. To create a **rule** press "**New**"



Choose if this **rule** is **active** or not

Choose **type of rule** (in this case it's an **message**)

The **content** of **message**

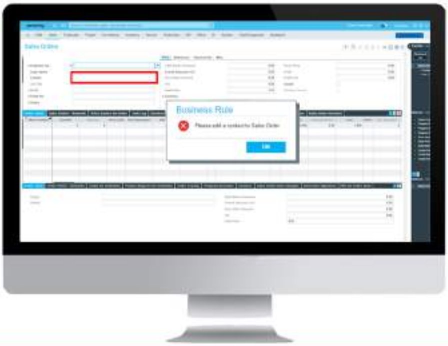
Condition

Add another condition

Delete condition

Error message: will not allow to proceed
Warning message: user can choose to proceed or not

Result



Business Rules - Business Rules are used to react on some changes in a form. They can display warning messages, error messages, send emails, text messages and open tasks. They can't be shared between forms and are applicable to only one active form, it will not check for changes in sublevels.

Email requires a **subject**

Added **fields** from **form** to **email** text

Add a **document** (from **direct activations**) as **attachment**

Send **attached files** to given **document** as well

Refer to **current** and **previous value**

Pressing "OK" to save

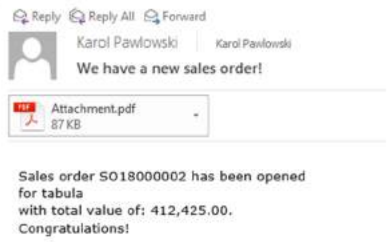
Choose **type of rule** (in this case it's an **email** – **task** and **text message** are the same)

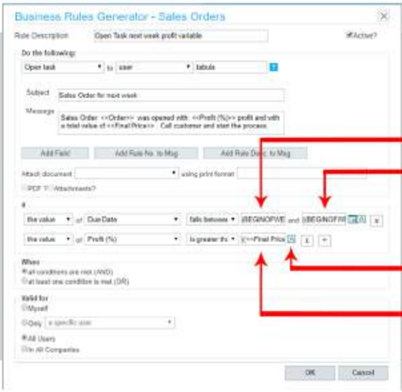
If given **field** has a **drop down menu** then it will available here as well

This button allows to use simple **functions** (mostly dates related)

Field from **form** used for condition

Result





BEGINOFWEEK(WEEK(SQL.DATE) + 1)

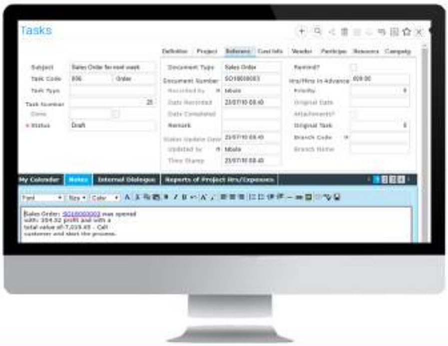
(BEGINOFWEEK(WEEK(SQL.DATE)+2) - 24:00)

(<<Final Price>> > 20000 0 ? 20 : 30)

"IF" statement:
(**condition ? value if true : value if false**)

SQL.DATE → today's date

Result

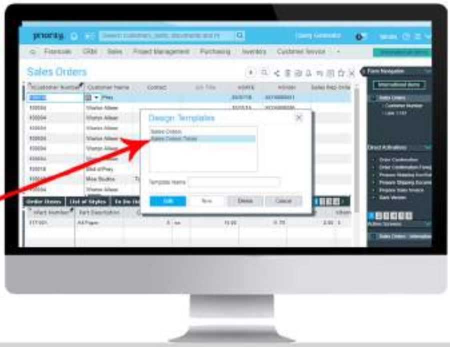


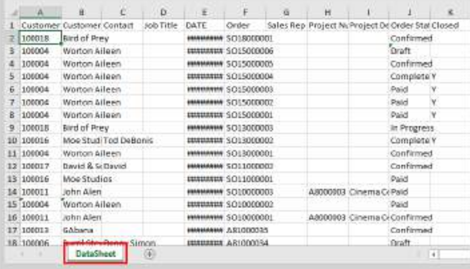
Business Rules - Business Rules are used to react on some changes in a form. They can display warning messages, error messages, send emails, text messages and open tasks. They can't be shared between forms and are applicable to only one active form, it will not check for changes in sublevels.

1. In order to prepare **template** retrieve all **records** you would like to **download** to **Excel**
2. This set of **records** will be displayed in **Excel** during **template** creation
3. Click ☰ , then "**Design**" and "**Spreadsheet Template Generator**"

4. You may pick already created **template** and **edit** it or **delete**
5. In order to create new one type its name in "**Template Name**" field and press "**New**"
6. Excel will open with all **record**s retrieved in the **form**

Available templates for this form

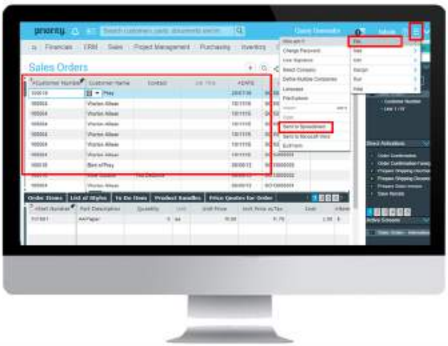




	A	B	C	D	E	F	G	H	I	J	K
1	Customer	Customer	Contact	Job Title	DATE	Order	Sales Rep	Project Nu	Project De	Order Stat	Closed
2	100018	Bird of Prey			########	SO18000001				Confirmed	
3	100004	Worton Aileen			########	SO15000006				Draft	
4	100004	Worton Aileen			########	SO15000005				Confirmed	
5	100004	Worton Aileen			########	SO15000004				Complete	Y
6	100004	Worton Aileen			########	SO15000003				Paid	Y
7	100004	Worton Aileen			########	SO15000002				Paid	Y
8	100004	Worton Aileen			########	SO15000001				Paid	Y
9	100018	Bird of Prey			########	SO13000003				In Progress	
10	100016	Moe Studi	Tod DeBonis		########	SO13000002				Complete	Y
11	100004	Worton Aileen			########	SO13000001				Confirmed	
12	100017	David & S	David		########	SO11000002				Confirmed	
13	100016	Moe Studios			########	SO11000001				Paid	
14	100011	John Allen			########	SO10000003		A8000003	Cinema C	Paid	
15	100004	Worton Aileen			########	SO10000002				Paid	
16	100011	John Allen			########	SO10000001		A8000003	Cinema C	Confirmed	
17	100013	GAbana			########	AR1000035				Confirmed	
18	100006	[illegible]	Simon		########	AR1000034				Draft	

DataSheet

7. You can apply any formatting to the **DataSheet**
8. Any other changes in **DataSheet** will be overridden by data from Priority
9. You may want to use **macros** or another **sheets** and refer to this one to make more sophisticated **reports** etc.
10. After you finish save this **document** (do not use SAVE AS) and close **Excel**, file will be stored in Priority



1. In order to send data to **Excel** retrieve all **records** you would like to **download**
2. Click ☰ , then "**File**" and "**Send to Spreadsheet**"
3. Choose required **template** and press "OK"
4. You may want to not use any **template** then choose "**No Template**"

Excel Templates - Download selected records consistently every time. Each form (also subform) can have its own selection of excel templates (can't be shared between forms). Download data only from one active form. All visible columns are downloaded. During download, data will override any existing data in first sheet (DataSheet), formatting can be applied. In order to open Excel Report Generator, form must have at least one record displayed. The sequence of columns is identical as in multi-record view.

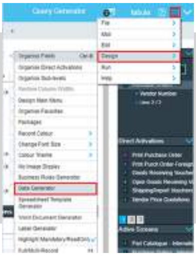
To add a portlet to the home page:

1. Click the icon and choose the desired topic in the window that opens. The portlet will then appear on your home page.

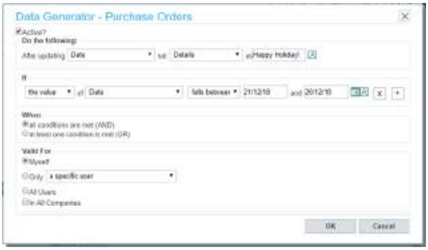
2. Hover with your mouse over the upper-left corner of the portlet and then click the three dots that appear.

   Choose one of the following options:
   - Select Choose Dates to select the period for which to display the data (in relevant portlets).
   - 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.

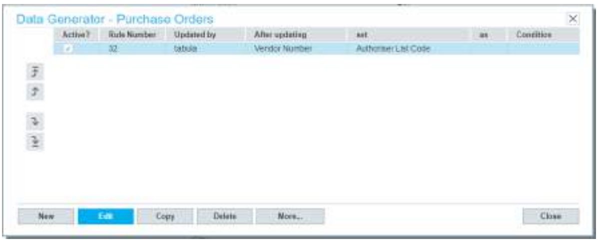
Portlets - Portlets require BI module installed. With Portlets you can graphically display up-to-date company data (e.g., open sales orders, purchase orders, profit and loss).



That is, click the Options Menu button, click Design and select Data Generator.

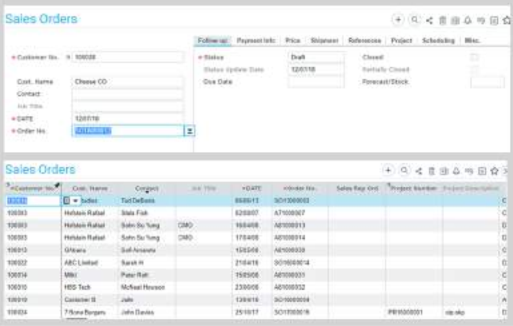


1. Select the Date column title in the After updating text box, and Details in the set text box. In the as text box, record the words “Happy Holiday!”.
2. In the first line of the If section, open the Choose list in the second text box and select the Date column title.
3. Open the Choose list in the third text box and select falls between. In the two additional boxes that appears, right-click each calendar and select any two dates.
4. Click OK to create the rule and exit the Data Generator.
5. 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 Ref tab) will be filled in automatically with the chosen expression.



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.

Data Generator - The Data generator functions in a similar manner to the Business Rules Generator; instead of displaying or sending a message, the system records a designated value in a particular form column after a specific field is updated.

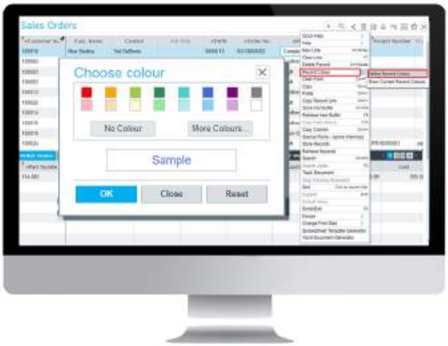


1. In Sales Orders form click the Options Menu button, click Run and select Retrieve All Records. Or to use shortcut press F11 enter * in Customer Number column and press Enter to retrieve all records

2. Make sure you're in multi-record display view instead of single-record display view. To navigate between the views press F4.

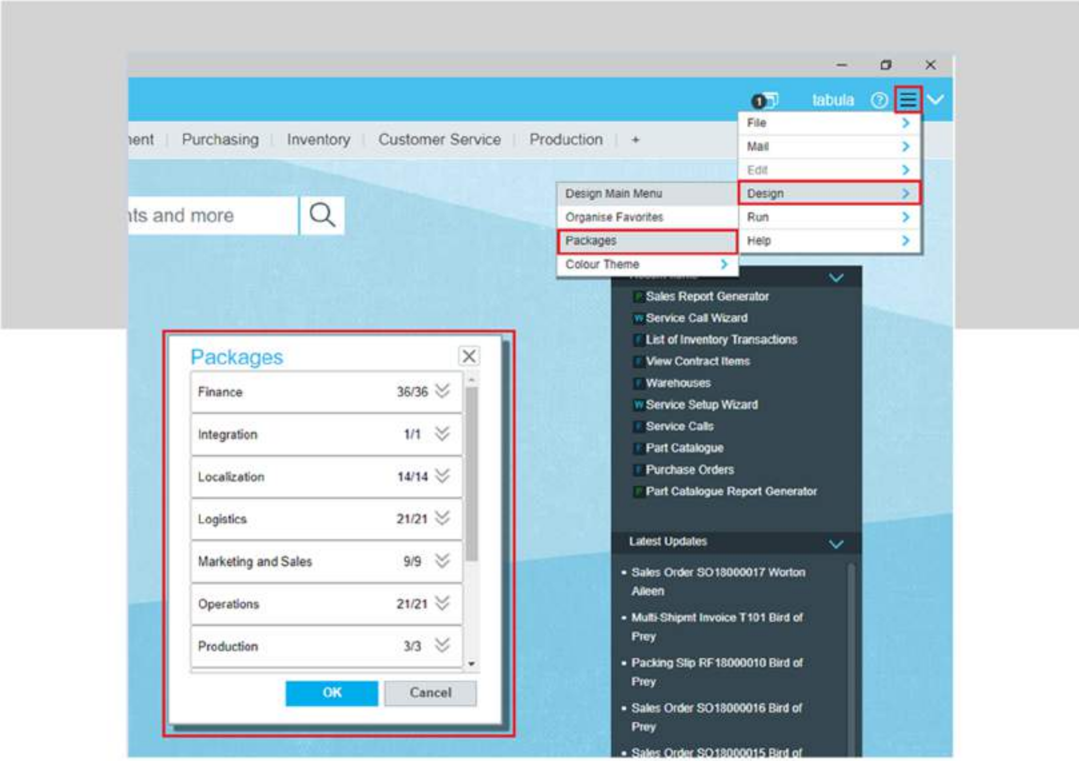
3. In multi-record display view find Status column.

4. Right-click the Status column. Select Record Color > Define Record Color, select a color and click OK. Each Sales Order record with the same Status will appear in the chosen color.



Result

Define Record Colour - In Priority it is possible to colour-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.



Packages - Packages function in Priority may be used to reduce un-used fields and forms throughout the whole system. Unticking item in chosen Package Heading and selecting 'Ok' will prompt you to exit and re-enter the system. Upon re-entering the system user won't see the unselected items anymore. Forms, fields and direct activations will be hidden from the system for all users.