Priority Advanced Hints & Tips





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Advanced Hints & Tips

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- 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
- 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**
- 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

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

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- 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.

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- 1. Highlight a field you wish to copy
- Click , then "Edit" and "Store into Buffer" or press CTRL + F9
- A new window will pop out, type in the number you would like to have your copied data stored under and click "OK"
- 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)
- Click , then "Edit" and "Retrieve from Buffer" or press F9
- 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

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Advanced Hints & Tips



- 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 summarv

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5. To create a rule press "New"

Business Rules Generator - Sales Orders

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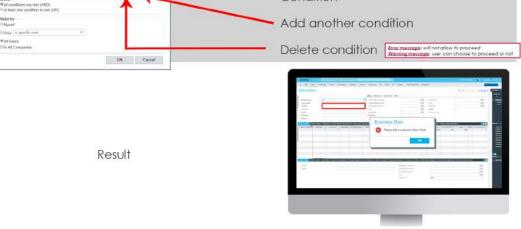
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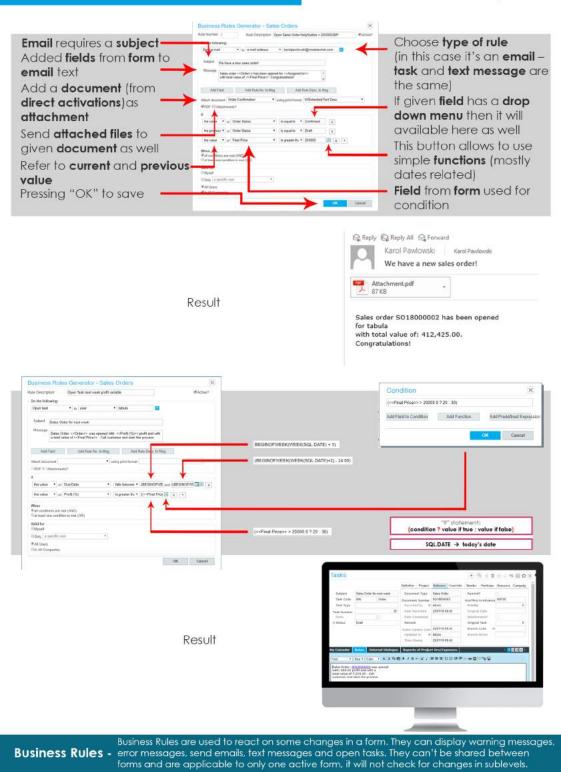


- Choose if this rule is active or not
- Choose type of rule (in this case it's an message)
- The content of message
- Condition



Business Rules are used to react on some changes in a form. They can display warning messages, **Business Rules** 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.

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- 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
- Click , then "Design" and "Spreadsheet Template Generator"
- You may pick already created template and edit it or delete
- In order to create new one type its name in "Template Name" field and press "New"
- Excel will open with all records retrieved in the form

Available templates for this form

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- You can apply any formatting to the DataSheet
- 8. Any other changes in **DataSheet** will be overridden by data from Priority
- You may want to use macros or another sheets and refer to this one to make more sophisticated reports etc.
- After you finish save this document (do not use SAVE AS) and close Excel, file will be stored in Priority
- In order to send data to Excel retrieve all records you would like to download
- 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**"

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.



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

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- 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.

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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.

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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.

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Define Record Colour - changes the font color of a record when a given column receives a designated value or range of values.

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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.



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