

Release Notes *Priority* 13 WPF

General

- New user interface, based on Microsoft's advanced development tool .NET Framework 3.5:
 - Remote connection to the server via Internet Explorer.
 - Permanent display of the main **Priority** menu and Favorites menu alongside your work area.
 - Use of Windows Presentation Foundation (WPF) graphic libraries, including animation, shading and more.
 - Use of Windows Communication Foundation (WCF) libraries, for secure data transfer over the Internet.
 - Use of Application Server technology to improve performance for multiple simultaneous users.
 - Full connectivity to your local MS-Office.
- New graphic user interface for custom report generators:
 - Quickly and easily define reports by dragging and dropping the desired columns.
 - Create tabular reports.
 - Select columns for display in the report header.
 - Copy existing reports.
 - Run new reports directly from the report generator.
 - Link newly created reports to a **Priority** menu.

Priority On Outlook

- A CRM module that gives sales reps full access to the system from within MS-Outlook, allowing them to search and update leads, contacts, customers, sales opportunities and tasks.
- A new Dashboard for production control including windows for analyzing inventory values, production reports, production costs and expected workload in work cells, and for displaying general part data.
- A new Dashboard for marketing and sales, including windows for all sales orders, open orders, sales, sales opportunities, commission orders and commission sales invoices.

- A new Dashboard for purchase management, including windows for all purchase orders, purchase invoices, open purchase orders and open purchase requisitions.
- A new Dashboard for inventory control with windows for current inventory, inventory valuation, part data and base product data.
- Calendar and task log added to the User Dashboard.
- Dashboards can be opened from within **Priority** menus.
- Dashboard windows can be enlarged and displayed full-screen, using a magnifying glass icon in the upper toolbar.
- Display of **Priority** forms from within Outlook, including the ability to update status and assign users.
- Improvements to synchronization with Outlook:
 - Synchronization parameters are defined within the User Dashboard.
 - Synchronizations can be performed even when not working on the local network.
 - E-mail messages that are synchronized with tasks in **Priority** are automatically linked to the task as an attachment.
 - Mail in Outlook that is synchronized with **Priority** is automatically linked to the relevant document (e.g., an outgoing shipping voucher), provided the document number appears in the mail's Subject.
 - **Priority** tasks that are assigned the Canceled status are automatically deleted in Outlook.
 - Tasks deleted during synchronization with Outlook appear in the Deleted Items list.
 - A new program, called **Load CRM into MS-Outlook**, allows you to load tasks from **Priority's Task Log** into Outlook Tasks.

Special Offers Module

The new Special Offers module allows you to define refunds and gifts to customers based on purchases over a given period:

- Define parts participating in the special offer by part number or family.
- Define offers based on purchased quantity or sale total.
- Restrict offers to a given period of time and to participating customers.
- Maintain a Business Process Management (BPM) flow chart for approval of special offers.
- View tracking and profitability reports.
- Produce credit memos and orders automatically for customers entitled to rewards.

Warehouse Management System (WMS) Module

The new WMS module allows you to manage warehouse transactions by means of tasks that are opened automatically:

- Supports the three basic task types – pick, put and replenish – as well as all other warehouse actions.
- Tasks are opened automatically by means of waves (e.g., a pick wave for sales orders based on distribution route; a wave of bulk issues to the floor based on work orders).
- Full infrastructure for linking to ADC devices for the purpose of reporting task execution.
- OLAP analyses of warehouse tasks.
- Pallet management.

Sales Forecasts Module

The new Sales Forecasts module allows you to define sales targets for sales reps, to check real-time compliance with those targets and to reward sales reps accordingly.

- Define sales targets per customer, customer group, part and part family.
- Maintain separate sales targets for orders and for invoices.
- Run projected compliance reports with respect to orders, based on sales opportunities.
- Run projected compliance reports with respect to invoices, based on open sales orders and project revenues defined for sales opportunities.
- Measure actual compliance against orders or invoices in the relevant period.
- Define hierarchies of sales reps (unlimited levels) and check sales target compliance per hierarchy.
- Update sales targets automatically, based on actual sales in previous periods and taking into account seasonality and sales trends.
- Create a multi-level hierarchy of sales territories.
- Check forecast compliance by territory.

Data Migration Module

The new Data Migration module provides a user-friendly mechanism for loading data from external programs into **Priority**.

- Easy-to-use screens to define the structure of the imported files.
- Data is loaded into interim tables, without data checks.

- Special programs check the imported data in the tables; data can be revised manually in the tables.
- Additional programs for automatic data revisions.
- Data is loaded from the interim tables into the regular database.

Marketing and Sales

- Task log is a sub-level of all documents, allowing you to open tasks for the document appearing in the upper-level form.
- Improvements to the **Leads** form:
 - The addition of lead statuses, including Business Process Management (BPM).
 - New form columns, such as details about the customer, sales rep, date opened and so forth.
- New sub-level of the **Sales Opportunities** form allows you to record projected revenue, so as to plan invoicing.
- Can record price with tax in customer price lists.
- Support of blanket sales orders based on a sales total (in addition to blanket orders based on ordered quantities).
- Customer price quote versions.
- Addition of a new order status flag, "Canceled": canceled orders update the blanket order balance.
- New sub-level of the **Part Catalogue** form: **Active Price Quotes for Part**.
- Automatic construction of production forecasts based on sales in previous periods.
- Dual-currency users: Linked currency can be assigned to foreign-currency orders.
- A new form allows for **Revision of Final Ship Doc Items**.
- **Cancel Final Document by Return**, a new Direct Activation, cancels a customer shipment and creates a return document for the entire shipment quantity.
- Improved delivery scheduling of orders by assigning distribution routes to zones.
- A new column in which to record the user responsible for customer billing follow-up; that person appears in the aging work area.
- Opening data added to customer records.
- Improvements to outgoing shipping vouchers:
 - Contacts added.

- Support of checklist for working with the vouchers.
- Linkage of order items to vouchers.
- Single-level form for service contract items.
- Orders can be flagged to allow exceptions to credit limits.
- Dual-currency users: Update of cross-currency and multi-company exchange rates, even when the companies in question have different local currencies.

Purchasing

- Addition of vendor groups.
- Attachments added to blanket purchase orders.
- Addition of a new order status flag, "Canceled": canceled orders update the blanket order balance.
- The user recorded in a purchase requisition can obtain notification when the requisitioned part is received into the warehouse.
- HTML interface for recording, updating and authorizing purchase orders.
- New program closes purchase orders in a batch.
- Status and status history added to purchase order items; item status can be updated from within the shipping voucher.
- Improvements to incoming shipping vouchers:
 - Contacts added.
 - Support of checklist for working with vouchers.
- Dual-currency users: Progressive withholding tax.

Production and Inventory Control

- New OLAP report for analyzing inventory valuations.
- New OLAP report for analyzing production costs.
- New OLAP report for production reports.
- Inventory control by pallets.
- History of changes displayed per part.
- New program adjusts warehouse inventory from within the **Part Catalogue**.
- New bottom-up BOM reports, displaying all parent parts of a given part.
- New **Inv Journal by Warhs & Base Prod** report displays data per base product.
- New **InvJournal for Warehouse by Oper** report displays data per production operation.

- New **Inventory Aging per Warehouse** report.
- New single-level form for production reports, including the options of adding new reports and updating existing ones.
- New single-level form for issues of components to warehouse assemblies.
- International bar codes.
- MRB: Recording of malfunctions and their handling by the review board is integrated into the **Malfunction Document** form, with work flow controlled by BPM flow charts.
- BPM flow chart for RMAs.

Finance

- Dual-currency users: New **Currency Exposure** report.
- Built-in aid for balancing manual journal entries.
- A new program allows you to **Copy Journal Entry**.
- Cost allocation: Indirect costs can be distributed among profit centers based on YTD direct costs.
- Automatic recording of inventory valuations in the ledger when working with Periodic COGS.
- Online recording of Actual Perpetual COGS in the ledger.
- Revaluations of fixed assets, in conformance with IFRS.
- Addition of special budgets, with BPM support for authorization. These are added during the fiscal year and budgeted separately from regular budgets.
- New cash flow forecast definitions:
 - Flag individual A/R and A/P accounts to **Omit From Cash Flow**.
 - Record the bank account for cash flow for individual A/R and A/P accounts.
 - Record a **Main Bank Account**, which holds for all customers/vendors that are not linked to a specific bank account for cash flow.
 - Record **Avg Late Payments** for vendors in the **Financial Parameters for Vendors** form (like the same column for customers).
 - Record a **Cash Flow Date** for individual entry items, to determine the date the item is considered for cash flow forecasts. When blank, the entry's due date is used.
 - Flag a purchase demand to **Omit from Cash Flow** all PRs in the document.

- Set a **Cash Flow Code** in GL accounts, similar to A/R and A/P accounts.
- Improvements to the **Create Provisional Entries** program (for cash flow forecasts):
 - The program creates provisional entries for purchase requisitions, taking into account the **Omit from Cash Flow** flag in the demand document.
 - When choosing the types of documents for which to create entries, you can select multiple options (rather than all or only one of them).
 - Change in how sales orders and forecast orders are treated: When defined to create provisional entries based on forecast orders, then as of the designated date, the program opens entries only for forecast orders and not for regular sales orders.
- Improvement to the Cash Flow Forecast:
 - Can be run by local currency or account currency (and in the dual-currency package, by second currency).
 - Input of bank account is relevant to all display versions of the report.
 - A/R and A/P accounts are included in the report when run Per Bank Account, which displays the same sums as the general cash flow forecast.
 - Can run the forecast by cash flow code (in addition to 3 other parameters: summary, account details and full details).
 - Takes into account the new **Avg Late Payments** column for vendors.
 - Takes into account the new **Cash Flow Date** column for journal entry items.
 - Local-currency adjustment of foreign-currency account sums based on current exchange rate and not historic rate.

Project Management

- New single-level form of **Project Activities**, including BPM support of activities.
- Attachments to project activities.
- Service costs added to project costs, based on defined service cost per part.
- Shipping voucher burdens added to project.
- New report compares the planning of different SOW versions.
- History of changes in project payments.

- Programs to upload/download SOW documents.
- Programs to upload/download project planning.

Human Resources

- Definition of job openings per company position.
- **List of Applicants** form, to view prospective candidates, and management of the hiring process (including hiring an existing employee for a new job).
- Distinction in the personnel file between an inactive employee and an inactive user (where the latter is an active employee who is not authorized to work in **Priority**).

Integration with BI (Business Intelligence) Tools

- Automatic creation of an SQL Server cube based on a **Priority** OLAP report.
- Generation of an SQL query from an existing system report; useful for retrieving data in BI tools and external programs.
- Ability to generate an SQL query also on the basis of user-designed (customized) reports.

Miscellaneous

- Ability to link library documents to various system documents, projects and customers.
- Addition of planned hours and priority to the **To Do List**.

Technology and System Management

- A calculator is available from within any form.
- Decimal precision can be set in the custom report generator.
- Support for the "OR" condition in input screens of reports and programs.
- User-specific definition of companies included in consolidated (multi-company) reports, from the File menu.
- New interface with MS-Project, based on COM technology.
- Support of web services (SaaS) for uploading/downloading system data.
- Ability to add a user-designed report to any menu.
- Fixed display of column headings when scrolling down a report.
- The **Ctrl+G** key allows you to access a specific form line.
- Can ignore case during a Search.