

## List of Upgrades for *Priority 12*

### General

- New form design
  - Totals displayed at the bottom of transaction documents.
  - Choice of display styles.
  - Option to color the various sections of a form.
  - Option to display separating lines that ease the visual matching of titles with their fields.
  - Option to display sunken, rather than flat, field boxes.
  - Yellow triangles designate fields from which an OLAP analysis can be run; clicking the triangle activates the report.
  - Option to hide the Sub-Level Form Bar.
- Improved Main Menu
  - Choice of display styles.
  - Option to color the upper toolbars.
  - A new icon representing the Bulletin Board.
- Connectivity to Skype and MSN-Messenger by clicking a Toolbar icon from within the phone and e-mail columns, respectively.
- Webinars: Instructional films in addition to wizards and form help. Webinars are currently available for inventory counts and initializing the fiscal year.
- Improvements to OLAP reports
  - When performing Drill Down, you can choose to display only part of the data by using the template. For example, in the Sales OLAP report, when choosing to view itemization per part number, if you define a template of "5\*", only those parts beginning with the number 5 will be displayed.
  - Display monthly averages in addition to simple and cumulative percentages.
- Collapse/expand capabilities for report rows: enabled by plus and minus signs in the upper left-hand corner of the report.
- Right-clicking on a column title in a tabular form opens a sum total of all values in that column.
- **Ctrl+S** is the new shortcut key for sending form record links.

- **Ctrl+Shift+Home** and **Ctrl+Shift+End** are two new shortcut keys in text forms, which enable you to select all text from the cursor to the beginning or to the end of the text, respectively.
- Option to print out documents using the branch logo, rather than the company logo.
- **Attachments?** flag added to various documents in the system, as well as to the **Customer**, **Vendor** and **Parts** forms.
- When sending data from a form to be printed by Word, you can also save the new file as an attachment.
- Supports the copying of weekly/monthly tasks.

## Marketing and Sales

- The addition of statuses to customers, including Business Process Management (BPM).
- Improved marketing campaigns – the progress of a campaign is determined by the statuses of its sales opportunities.
- General representative customer – prices and discounts defined for this customer apply to all customers.
- Definition of bonuses for part families, including graduated bonuses.
- Inventory levels for consignment warehouses, including minimum and maximum levels, and an automatic program that refreshes inventory levels by opening orders for understocked warehouses.
- Addition of billing customers to customer shipment/return documents and service contracts.
- Improved distribution – sales order statuses now contain an automatic scheduling flag. Only orders that have the right status will be scheduled for delivery.
- Customer Return documents may be based on service calls.
- Improved customer returns – checking that the returned quantity is not larger than the original shipped quantity, including when several returns have been opened for a single shipment.
- Pro Forma invoices may be based on multiple shipping documents.
- Order lines may be flagged in Over-the-Counter invoices.
- Branch cashiers may be defined for all payment methods.
- Reference columns have been added to line items in shipping documents and sales invoices.
- A new single-level form displays the details of customer networks.
- Weights added to OLAP invoices reports.

## Purchasing

- The addition of statuses to vendors, including Business Process Management (BPM).
- Vendors for purchase orders can be defined for sales order items in the Order Items form. A new program opens purchase orders based on sales orders using the vendors defined for each part.
- A new flag in the **Purchase Requisitions** form allows you to copy prices from PRs to purchase orders. The flag is marked automatically when the price in the PR has been updated on the basis of a vendor price quote.
- A single purchase order can be opened on the basis of multiple sales orders.
- New statuses can be defined for purchase orders and purchase requisitions that have already been authorized, or whose authorization has been canceled.
- An additional text form has been added to purchase orders, for internal use.
- A new constant determines the number of days that the last price remains in force as a price source for purchase orders.
- New print formats for GRVs and Return to Vendor documents, which include prices.
- A **Task Log** sub-level form for vendors has been added to the **Vendors** form.

## Inventory

- A new flag for inactive warehouses.
- Statuses have been added to parts, including Business Process Management (BPM).
- A new single-level form displays laboratory test details.
- Child part revisions have been added to BOMs.
- A new constant allows part revisions to be opened automatically whenever a BOM revision is authorized.
- A new flag in the Part Families form prevents the recording of negative inventory.
- Whenever packed goods recorded in a final packing slip are transferred to a different warehouse and partially unpacked, a new packing slip is opened based on the original one.
- Supply priority is now based on inventory status – in a customer shipment document, the system uses inventory whose status represents a higher supply priority.

## Finance

- Improved budgeting
  - Defining levels in the budget tree.
  - Building budget items by defining the values of the various levels of the budget tree (similar to creating part numbers using parameters).
  - A new financial constant determines whether to check the budget structure according to the tree definitions.
  - Improved OLAP budget report – data can be cross-sectioned on every level of the tree.
  - Top-Down budget planning.
  - Business Process Management (BPM) for budgets.
- A new flag for inactive profit centers.
- Pending transactions are now displayed in profit center reports.
- Improved recording of pending transactions in cash flow management – with or without tax, option of separate journal entries for each document/order.
- Handling of Report 1099 (in the U.S.).

## Project Management

- A **Task Log** sub-level form has been added to the **Projects** form.
- Improvements in the projects Dashboard – a new To Do List window
- A new report that unites all tasks to be performed for the project.

## Human Resources

- A new Dashboard for human resources.
- A new table for job qualifications. Recording each candidate's qualifications allows you to search for appropriate candidates via qualifications.
- Improvements to jobs: New fields for company and desired starting time.
- New flags allow you to create statuses for positions that have already been manned, as well as for positions whose manning have been cancelled.
- Feedback questionnaires for employees.
- User-level report generator for job candidates.

## Technology and System Management

- Supports Internet Explorer 7.

- Supports Windows Vista.
- Supports Visual Studio 2005.
- Sends mail to Outlook (user-level definitions, useful to Services).
- Checks privileges of the operating system on the program's directories when entering the system.
- A new constant MAXPARAMLINES limits the number of records that can be retrieved by programs and in reports.
- A new program deletes default queries that users defined for forms.
- Separate privileges in the personnel file – one for synchronization from **Priority** to Outlook, and the other for the opposite direction.
- Backup of the MS-SQL database from within **Priority**, run by the Tabula Task Scheduler.