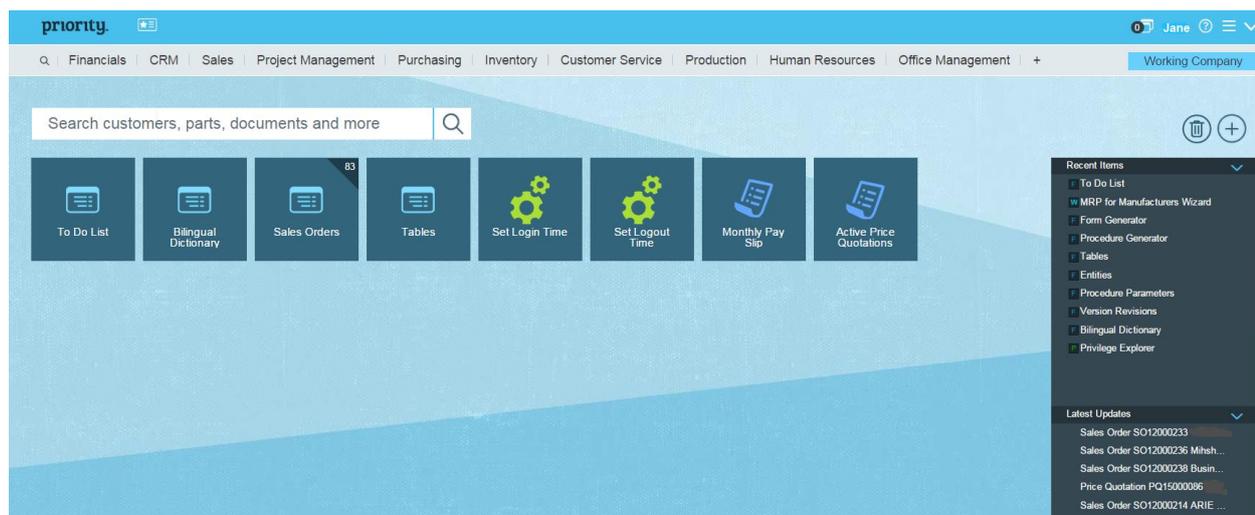


We are pleased to release version 17.1 of **Priority**.

The following is a short orientation guide that highlights the main improvements and additions to the **Priority Rich** interface.

Version 17.1 continues the interface improvement process introduced previously in version 17. We have turned customer feedback into new improvements to the UI, with the aim of streamlining the user experience and enhancing productivity.

## Home Page



The home page offers new options for displaying your most timely or relevant information at a glance. Quickly access the entities you worked on most recently and entities waiting for your attention.

- Initially, you will find all the entities from your Favorites menu  displayed on your home page (including entities from your Favorites sub-menus, which were not on the home page in version 17). Thereafter, the two are to be managed separately.
- To add an entity to your home page, click the  icon that opens the Add to Home Page window and retrieve the desired entity. Or right-click the entity name in the main menu and select "Add to Home Page".
- Organize tiles on the home page by drag & drop or conveniently remove them by dragging to the trash .
- Notice a number in the upper corner of some of your home page tiles? This triangle displays the number of documents of that type that are assigned to you. Click the triangle to access a display of these documents in your to-do list.

## Latest Updates

The **Latest Updates** list, located below **Recent Items**, helps you keep track of your latest activities:

- Click on any of the links to access documents that you revised during the past 30 days. Only documents in which you changed the status or assigned user will appear. The link displays the type of document, its number and additional details.

- If the **LOGUPDATE** system constant is set to 1, the **Latest Updates** list will also display documents in which you have revised remarks (in text forms) or to which you have attached files.
- Use the new **LATESTUPDATES** system constant to define the number of updates displayed in the list.

## Entity Search

Various time-saving options now allow you to add an entity to the home page or open it in the Privilege Explorer directly from the Search for Entity window.

## Privilege Explorer: New Functionality and Design

Using the Privilege Explorer just became a lot easier.

The **Privilege Explorer** has been redesigned to visually and intuitively display privileges for each entity.

## Privilege Explorer

	No Access	Read-only	Write/Run
• ▲ [M] Financials	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
• ▲ [M] Accounts Receivable	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
• ▲ [M] Customer Invoices	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ [M] Sales Invoices	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ [M] Over-the-Counter Invoices	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
▶ [M] Multi-Shipment Invoices	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
▶ [M] Export Invoices	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
• ▲ [M] Pro Forma Invoices	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
▶ [F] Pro Forma Invoices	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
[P] Prepare Pro Forma Invoices	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
[P] Finalize Pro Forma Invoices	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
• ▲ [D] Print Pro Forma Invoice	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

- Open the Privilege Explorer directly from a specific entity, from the menu or from the entity search.
- The new explorer displays a blue dot  for every entity, or menu that includes entities, that has not yet been assigned privileges.
- Privileges can be easily defined as No Access, Read-Only or Write/Run, by pressing the relevant radio button. Privileges assigned to an entire menu will automatically be assigned to all its entities and sub-menus (but can be revised as needed).
- Several partially highlighted radio buttons indicate menus which include mixed privileges for their sub-entities or forms with mixed privileges.

## Privilege Explorer

	No Access	Read-only	Write/Run	
▶ [M] Financials	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
▲ [M] CRM	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
▲ [M] Customers	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
▶ [F] Customers	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
[F] Customer Parts	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
[F] Customer Price Lists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/> Delete Records?
▶ [M] Customer Work Area	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

- Use the following icons to perform additional actions:
  - Copy privileges for the current entity to other users, groups or companies.
  - Define form column privileges and mandatory form columns (see below).

### Privilege Explorer - SUPPORT

	No Access	Read-only	Write/Run	
▶ [M] Main	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
▲ [M] Financials	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
▶ [M] Accounts Receivable	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
▶ [M] Accounts Payable				
▶ [M] General Ledger				
▲ [M] Budgets				
▶ [F] Budget Items				
▶ [F] Budget Versions				
▶ [F] Budget Appropriations				
▶ [F] Special Budget Appropriations				

	No Access	Read-only	Write/Run	Mandatory
Budget Item	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	*
Descrip (Budget)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	*
Budget Item (Lang 2)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	*
Type of Budget	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	*
Special Budget?	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	*
Start Date	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	*
End Date	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	*

- Change warning messages in forms into errors (or no message).  
Click the icon to open a window displaying all the form's messages (see below). To change a message to a warning/error or to prevent it from appearing, right-click it and select the desired option. You will notice an indicator next to each message – an active warning message (✓), error message (E), and an inactive message (N).
- Delete Records?** Remove the check mark to prevent users from deleting records in the current form.

### Privilege Explorer - SUPPORT

	No Access	Read-only	Write/Run	
▶ [M] Main	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
▲ [M] Financials				
▶ [M] Accounts Receivable				
▶ [M] Accounts Payable				
▶ [M] General Ledger				
▲ [M] Budgets				
▶ [F] Budget Items				
▶ [F] Budget Versions				
▶ [F] Budget Appropriations				
▶ [F] Special Budget Appropriations				

	No Access	Read-only	Write/Run	Mandatory
Budget Item	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	*
Descrip (Budget)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	*
Budget Item (Lang 2)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	*
Type of Budget	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	*
Special Budget?	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	*
Start Date	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	*
End Date	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	*

Budget Items	
<input checked="" type="checkbox"/>	You have defined a cash flow code, but no bank account for the cash flow.
<input checked="" type="checkbox"/>	This project is inactive.
<input checked="" type="checkbox"/>	The designated project is for a potential customer.
<input checked="" type="checkbox"/>	This credit card company is inactive.
<input checked="" type="checkbox"/>	This bank account is inactive.
<input checked="" type="checkbox"/>	You have assigned a P&L item for revenue to a purchasing
<input checked="" type="checkbox"/>	You have assigned a P&L item for expenses to a
<input checked="" type="checkbox"/>	You have assigned a sales budget
<input checked="" type="checkbox"/>	This cas

	No Access	Read-only	Write/Run	
▶ [M] Main	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
▲ [M] Financials				
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▶ [M] Accounts Payable				
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▶ [F] Budget Versions				
▶ [F] Budget Appropriations				
▶ [F] Special Budget Appropriations				

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▶ [M] Accounts Payable				
▶ [M] General Ledger				
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▶ [F] Budget Versions				
▶ [F] Budget Appropriations				
▶ [F] Special Budget Appropriations				

	No Access	Read-only	Write/Run	
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▶ [F] Budget Versions				
▶ [F] Budget Appropriations				
▶ [F] Special Budget Appropriations				

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	No Access	Read-only	Write/Run	
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	No Access	Read-only	Write/Run	
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	No Access	Read-only	Write/Run	
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▶ [F] Special Budget Appropriations				

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▶ [F] Budget Versions				
▶ [F] Budget Appropriations				
▶ [F] Special Budget Appropriations				

	No Access	Read-only	Write/Run	
▶ [M] Main	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	

## Form Display

When opening a form, note the following improvements in the design:

- Two new options have been added to the row of shortcuts:



-  Send Record Link - to send a link to a specific record via e-mail (Ctrl+S)
-  Delete Record (Ctrl+Delete)
- Customize the look of your forms by choosing a Dark/Light color theme from the **Design** menu (in the **Options** menu).

For more information about the new interface, see the **User Interface Guide** for *Priority Rich*, accessed by clicking on the Help button.