

Working with aiERP Companion

Overview

Meet your new way of working with **Priority**: aiERP Companion brings natural conversation directly into your ERP system. Instead of navigating through multiple forms and menus, simply tell aiERP Companion what you need in your own words, and watch it happen.

aiERP Companion transforms how you interact with **Priority**. Creating a customer? Generating an order? Running a report? Just ask. aiERP Companion understands your requests, completes the tasks, and hands you direct links to your results. It also lets you run agents that complete entire business processes. It's **Priority** working at the speed of conversation.

Available right on your homepage and within select **Priority** forms, aiERP Companion knows where you are and what you're working on. It picks up context from your user permissions and current form automatically, so you can focus on what you want to accomplish rather than how to get there.

Note: aiERP Companion currently supports conversations in English and Hebrew.

Aim

This guide explains how to set up and use aiERP Companion to complete everyday **Priority** tasks through natural conversation, including navigating the system, searching for records, creating and modifying data, running reports and programs, exporting data, and using AI agents for end-to-end business processes.

Prerequisites

Before you can work with aiERP Companion, make sure you meet the following requirements:

- You have an active **Priority** cloud subscription.
- The **APPMCP ASAPI** is included in your company's licensed applications.

Setups

Enabling aiERP Companion Permissions

To grant a user access to aiERP Companion:

1. Open the [User Permissions](#) form.



2. Select the user you want to grant access to.
1. Mark the **aiERP Companion** checkbox.

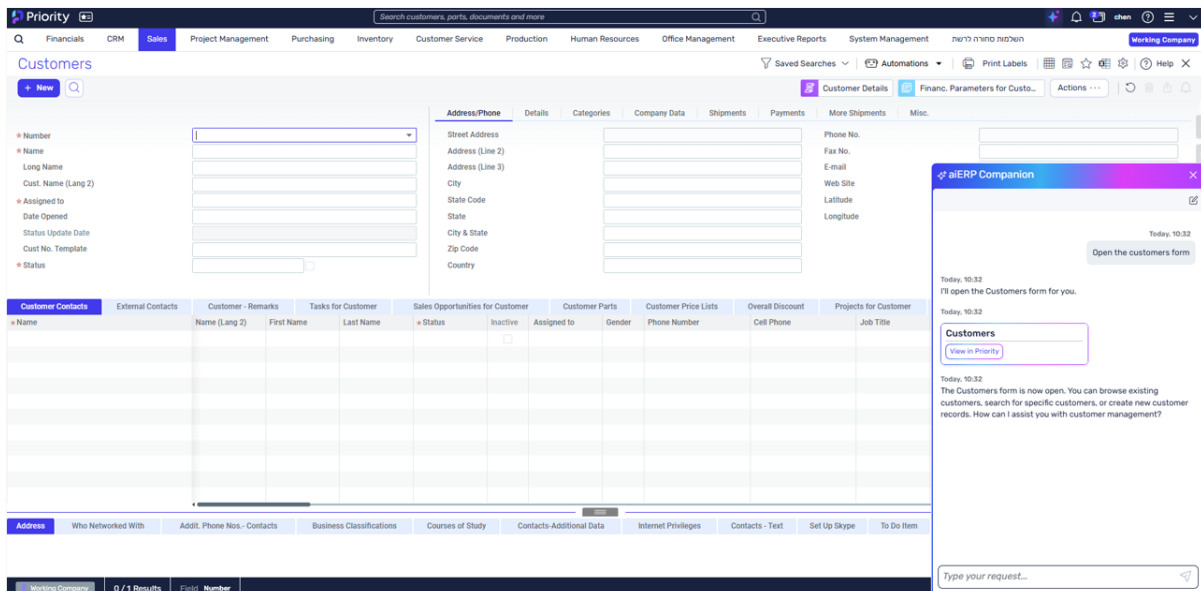
Once marked, the user can access aiERP Companion and use conversational AI within Priority. You can clear this checkbox at any time to block access.

Notes:

- When the **aiERP Companion** checkbox is not marked, the aiERP Companion icon remains visible in **Priority**, but is inactive.
- Only system administrators can make changes using the [User Permissions](#) form.

What aiERP Companion Can Help You Accomplish

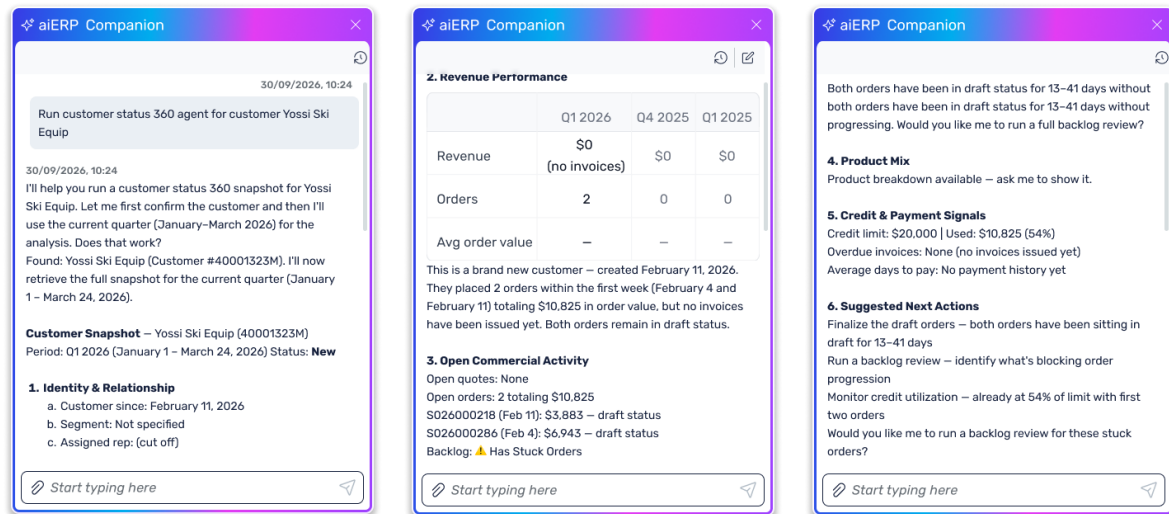
Navigate the System



The screenshot displays the Priority software interface. The main window shows the 'Customers' form with various tabs like 'Address/Phone', 'Details', 'Categories', etc. On the right side, there is a chat window titled 'aiERP Companion'. The chat window shows a conversation where the user has asked 'Open the customers form' and the AI assistant has responded with a button to 'View in Priority'.

Ask aiERP Companion to open a form by name. For example, ask it to “Open the customers form”.

Run Agents



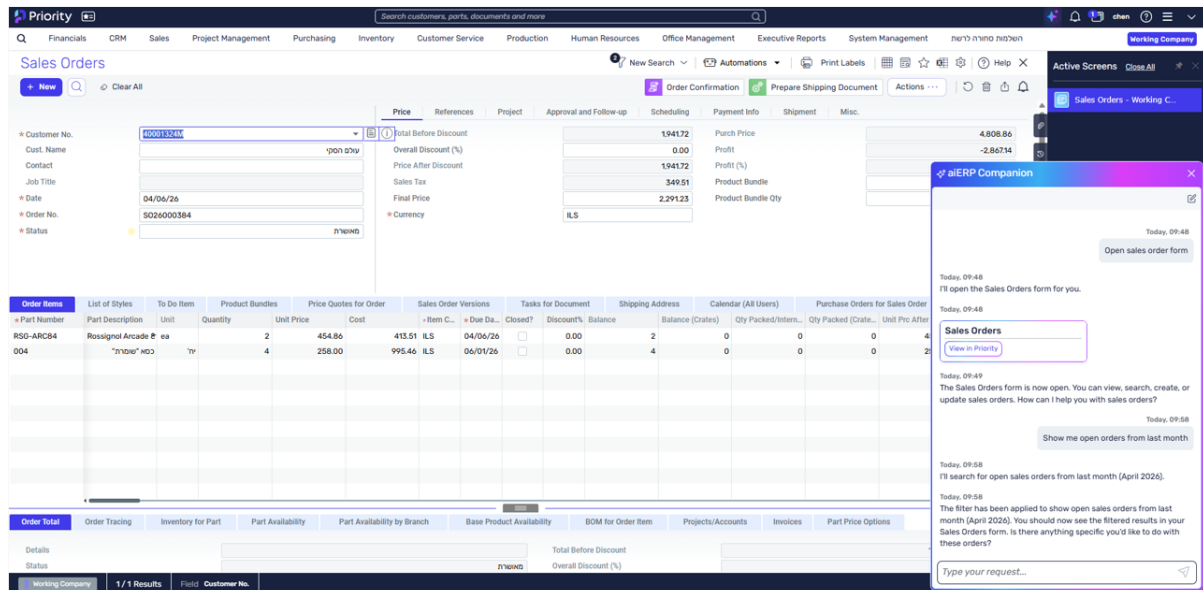
aiERP Agents may execute complete business processes on your behalf. Each agent is purpose-built for a specific workflow: it collects the information it needs, validates as it goes, and completes the action in **Priority**.

The current agents work across sales, purchasing, finance, payroll, and inventory processes. Here are a few examples:

- **Purchase Order Agent:** Creates a purchase order for a specified vendor after collecting the required details and checking for duplicates.
- **Customer Analytics Agent:** Pulls a full account snapshot before a sales call, including revenue trends, open quotes, stuck orders, and credit signals.
- **Journal Entry Recording Agent:** Identifies the entry type, validates the accounts, ensures the entry balances, and posts it based on a plain-language description of the transaction.

To use an agent, open the aiERP Companion chat, describe what you want to do, and let the agent handle the rest. For example, you can ask aiERP Companion to “Create a purchase order for [vendor]”, “Provide a snapshot of [customer name]”, or “Check stock availability for [part number]”.

Search and View Records



The screenshot displays the Priority software interface. The main window shows the 'Sales Orders' form with various tabs like Price, References, Project, etc. The 'Price' tab is active, showing a table with columns for Item, Unit, Quantity, Unit Price, Cost, and Total. The 'aiERP Companion' chat window is open on the right, showing a conversation about opening sales orders.

Find records across any form in **Priority** — customers, orders, items, invoices, and more.

Here are some ideas to get you started:

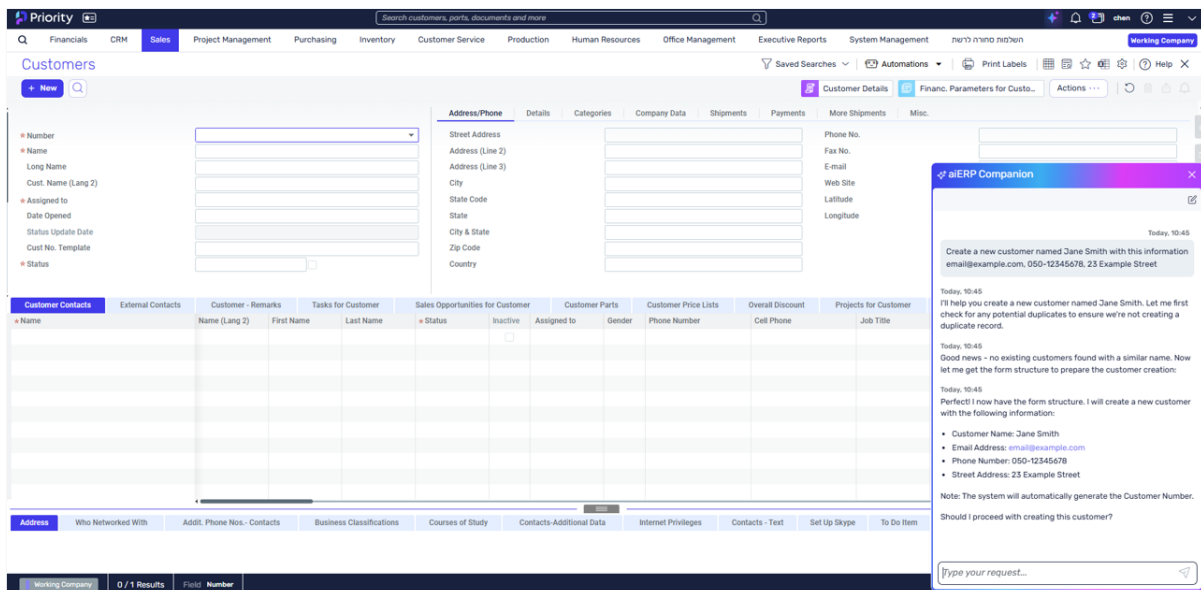
- “Find all customers in New York”
- “Show me open orders from last month”
- “Search for items with ‘laptop’ in the name”
- “Find invoices over \$10,000”
- “Show me all vendors with outstanding balances”

aiERP Companion searches the system and shows you matching records with relevant details in the chat or the relevant form.

To view detailed information about a specific record, including related subform data, you can ask aiERP Companion:

- “Show me details for customer ABC123”
- “Get order information for order number 5000”
- “Display item details for part number XYZ”
- “Show me invoice 12345 with all line items”

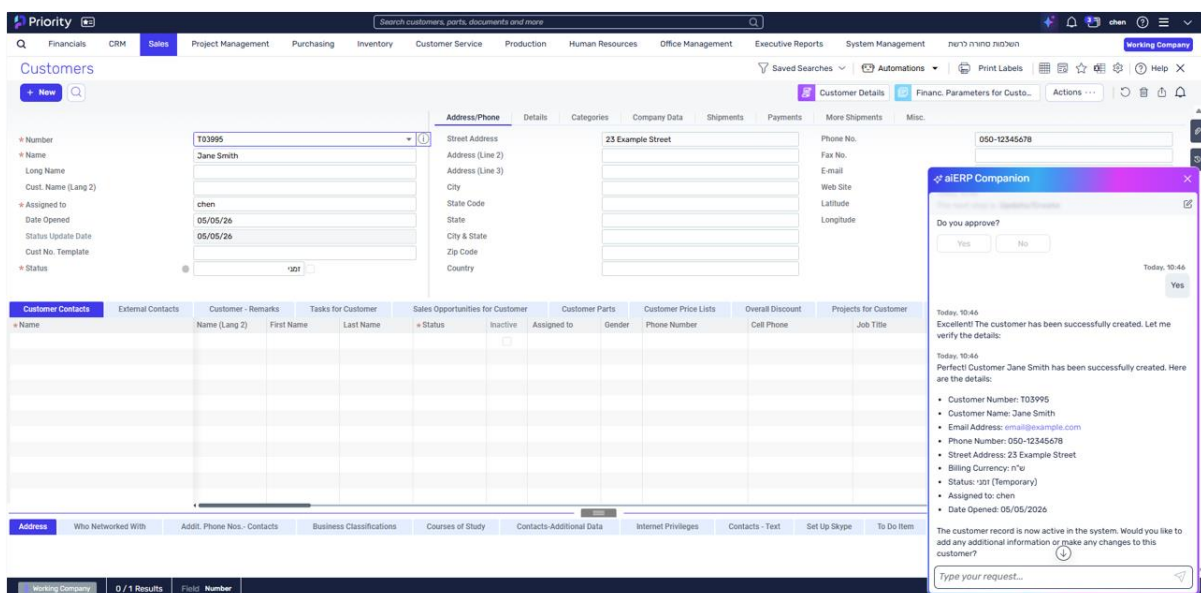
Create and Modify Records



You have the ability to add new customers, orders, items, invoices, or any other record type by asking aiERP Companion:

- “Create a new customer named Example Corp”
- “Add a new SKU”
- “Create a sales order for customer 123”
- “Add a new vendor”

aiERP Companion asks for required information, shows you the new record, and asks for your confirmation before saving.



To modify an existing record, type in the chat:

- “Update customer ABC to change their phone number to 555-1234”

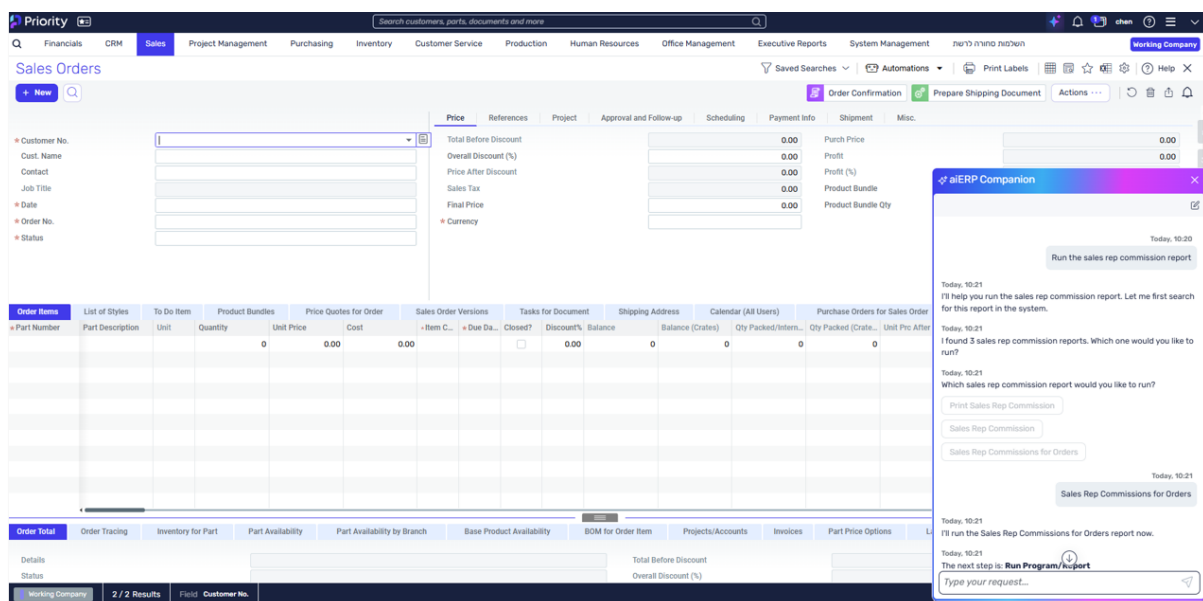


- “Change the price of item XYZ to \$99.99”
- “Update order 5000 to mark it as urgent”
- “Modify the address for vendor DEF”

Generate Reports

Ask aiERP Companion to run a **Priority** report by name. It finds the report, asks for any required parameters (such as date ranges or filters), runs it, and provides a link to the results.

If multiple reports share a similar name, aiERP Companion asks for clarification before proceeding.

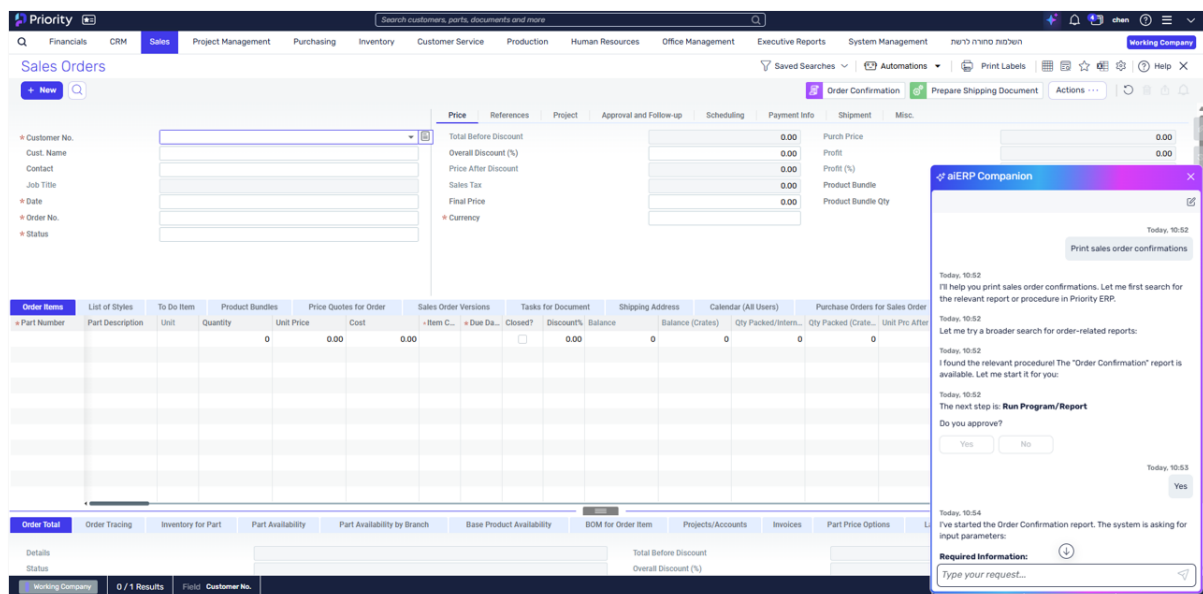


The screenshot displays the Priority ERP system's 'Sales Orders' module. The main window shows a form for creating or editing a sales order, with tabs for Price, References, Project, Approval and Follow-up, Scheduling, Payment Info, Shipment, and Misc. The 'Price' tab is active, showing fields for Total Before Discount, Overall Discount (%), Price After Discount, Sales Tax, Final Price, and Currency. Below the form is a table for 'Order Items' with columns for Part Number, Part Description, Unit, Quantity, Unit Price, Cost, Item C., Due Da., Closed?, Discount%, Balance, Balance (Crates), Qty Packed/Intern., Qty Packed (Crates), and Unit Price After. The table is currently empty. To the right, there is a sidebar with various links and a search bar. In the bottom right corner, the aiERP Companion chat window is open, showing a conversation where the user asks to run a sales rep commission report. The chat window displays the report results, including a table of sales rep commission reports for the selected date range.

Run Programs

You can ask aiERP Companion to run programs for various business operations:

- “Print sales order confirmations”
- “Generate customer invoices from orders”
- “Prepare shipping document”
- “Finalize this invoice”



aiERP Companion guides you through the steps, asks for required inputs, and runs the program with your approval.

aiERP Companion can run any program that appears on the menu. Programs that appear only within a specific form can only be run from that form. For example, to run the **Convert Potential Cust to Customer** program, open the **Customers** form first and then ask aiERP Companion to run the program.

Export Data to Excel

To export data from the current Priority form to an Excel file, type “Export to Excel.” aiERP Companion exports the data and provides the file.

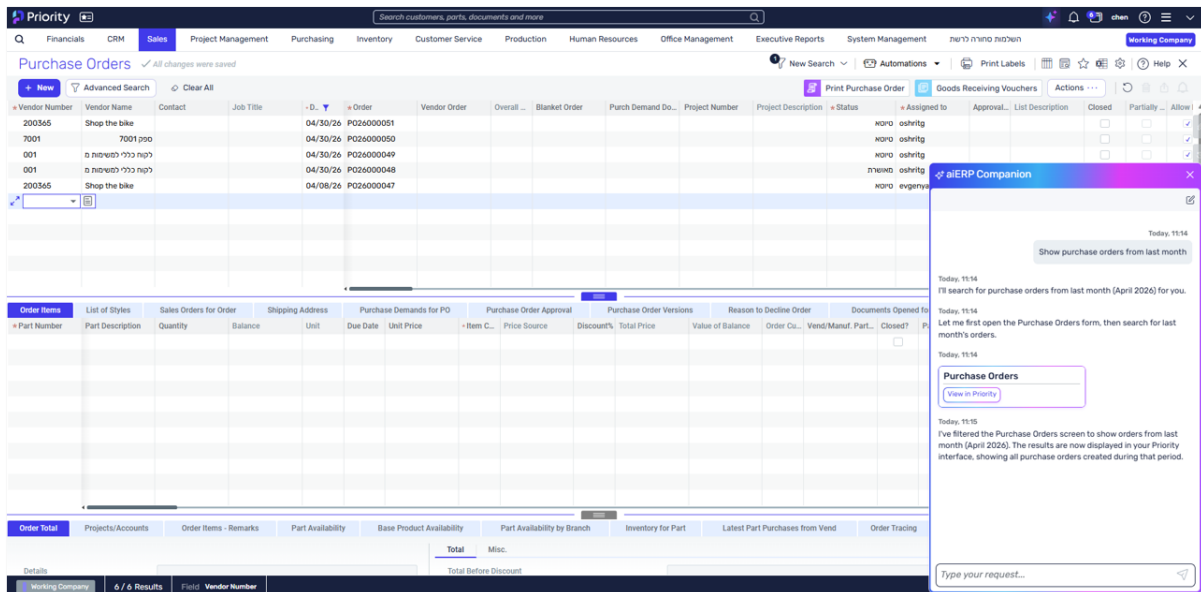
Get Smart Insights

aiERP Companion can query and provide insights on data to answer business questions. It runs the relevant query, performs calculations if needed, and presents the results.

Example requests:

- “Which vendors were created in February?”
- “Show open sales orders for Jane Smith”
- “List all customers with the Active status”
- “Show purchase orders from last month”
- “Find items priced above 500”





Note: Chat results are limited to 50 records per chat. You can still ask complex questions, such as:

- “Find sales orders for John Doe from January 2025 that have no available inventory”
- “How many sales orders were created in February by user Jane Smith?”
- “Which items ordered by Acme Corp last week are out of stock?”

If a query exceeds 50 records, aiERP Companion redirects to a **Priority Analytics** report. This may happen for queries such as:

- “How many customers were created in 2024?”
- “What is the total sales amount across all orders this year?”
- “Which open purchase orders have not been received yet this quarter?”
- “Show me all items below reorder point”

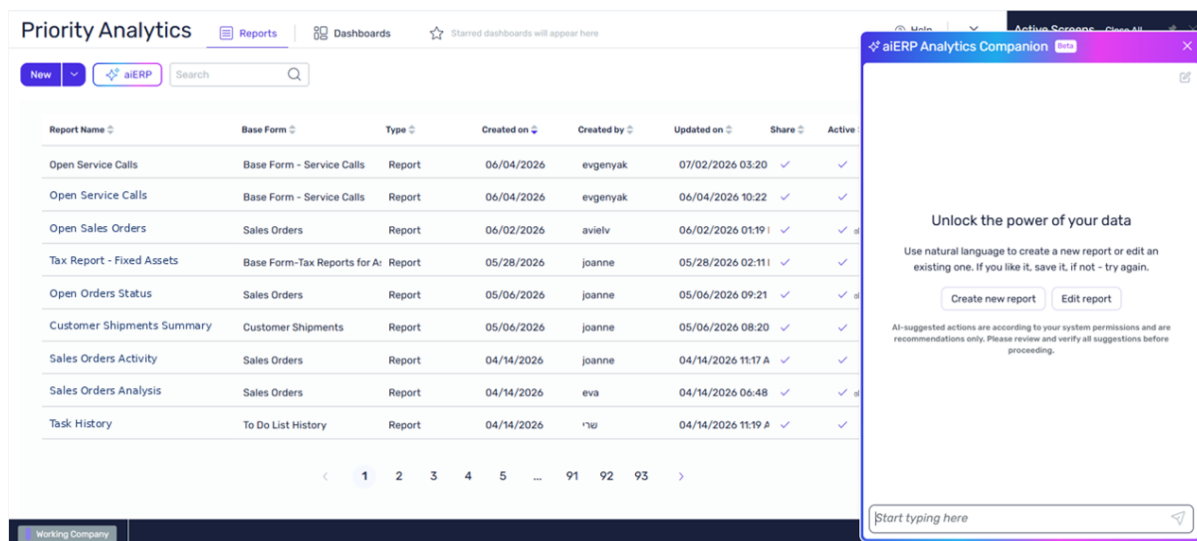
To build and edit reports and charts with AI assistance directly in **Priority Analytics**, see [Create and Edit Reports with AI](#) below.

Create and Edit Reports with AI

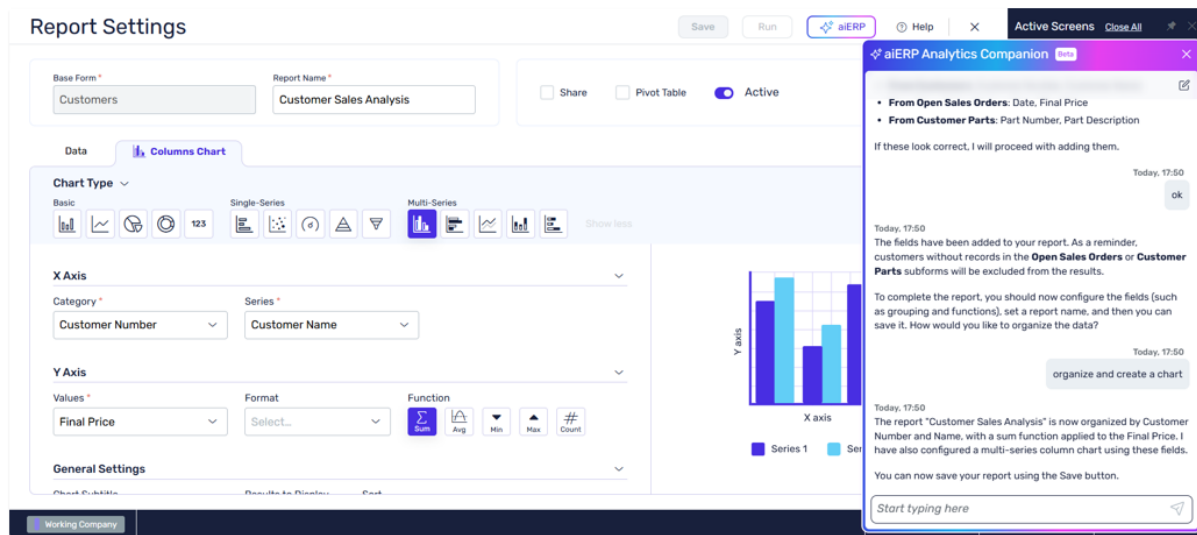
Priority Analytics includes a dedicated aiERP Companion that helps you build and edit reports and charts through conversation. Instead of manually selecting base forms, adding fields, and configuring grouping or chart axes, you can just describe what you need and the assistant handles the setup.

Note: This assistant is available only inside **Priority Analytics**. It is separate from the aiERP Companion chat available on your home page and within **Priority** forms.

What the aiERP Analytics Companion can do



- Create a new report by describing the data you need - aiERP Analytics Companion selects the base form, adds fields, and configures the report structure.
- Add or remove fields, define grouping, sorting, and functions.
- Build a chart on top of your report - choose a chart type and configure the axes.
- Edit an existing report that is already open.
- Rename fields, set input parameters, and mark a report as shared.



To use aiERP Analytics Companion:

1. Open **Priority Analytics** from your home page.
2. Open an existing report to edit it with aiERP Analytics Companion. To create a new report, click **New** or simply ask aiERP Analytics Companion to create the report for you.

3. Click the aiERP Analytics Companion icon to open the chat.
4. Describe what you want to build or change. For example:
 - “Create a report showing all sales orders by customer XYZ from the last quarter”
 - “Add a bar chart with customer ZYX on the X axis and the total price on the Y axis”
 - “Group the report by vendor and add a sum for the final price”
 - “Remove the status field and add a date filter”
5. aiERP Analytics Companion walks you through each step, asks for clarification when needed, and applies changes to the report. You can review the results as you go.
6. When you are satisfied with the report, click **Save**. The assistant does not save automatically.

Notes:

- aiERP Analytics Companion works with the same forms and fields available in **Priority Analytics**, except the forecast report. It respects your user permissions.
- You can switch between manual editing and the assistant at any time - the assistant picks up the current state of the report.
- To learn more about **Priority Analytics**, report building, chart types, and advanced definitions, see the **Priority Analytics** SOP in [Xpert](#).

Watch [this video](#) to see aiERP Analytics Companion in action.



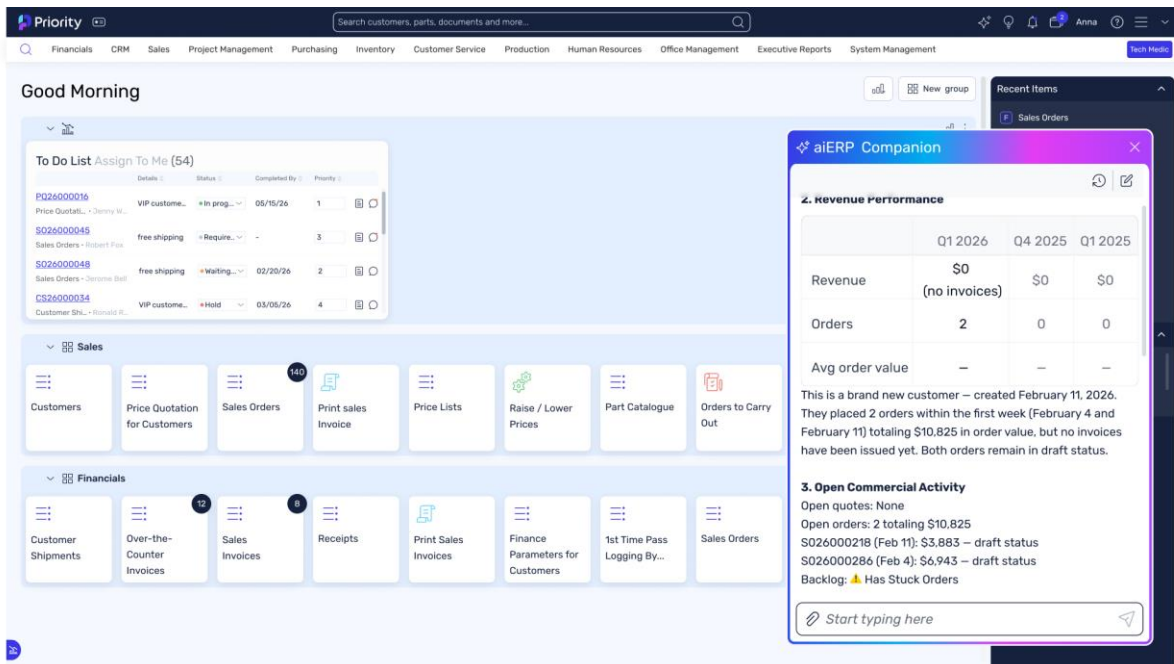
Getting Started

You can access aiERP Companion in two places:

- **Home Page:** Available when you log in.



- **Priority forms:** Available upon entry to the form, with context awareness for the current form.



aiERP Companion works on most Priority forms. The following areas are not supported:

- Advanced Delivery Planning interface
- Priority Analytics
- All split reconciliation forms (Bank, Account, Credit Card)
- All BPM forms
- All report generator forms and developer generators
- Financial configuration and Tabula Execution
- Mail and interface configuration, and system and permissions configuration

If your request involves multiple forms — some supported and some excluded — aiERP Companion automatically focuses on the supported ones and continues without interruption.

To work with aiERP Companion:

1. Click on the aiERP Companion icon to open the chat panel.
2. **Enter your request.** Type what you need in your own words, or choose one of the suggestions displayed. **Note:** aiERP Companion currently does not provide in depth nor advanced data analysis. Instead, you can use **Priority Analytics**.
3. **Work collaboratively.** aiERP Companion asks you questions and performs the actions for you. For example, if you ask aiERP Companion to create a new customer, it may ask you questions to create the customer accordingly.

Once done, aiERP Companion will provide a direct link to access the customer it created in **Priority**.

4. **Keep going.** To continue working on something related to what you just completed, keep chatting. aiERP Companion remembers what you discussed within the session. **Note:** To start a new conversation, click on the conversation icon or ask aiERP Companion to forget.

Results

When aiERP Companion completes a request:

- **The action is complete.** The record is created, the order is generated, or the report is ready, exactly as if you had completed the action manually in **Priority**.
- **You get immediate access.** aiERP Companion guides you to the result. For example, after creating a customer, you receive a link to the form containing the information. After generating a report, aiERP Companion provides a link to the report.
- **System updates run automatically.** Related records update, workflows trigger, and all behind-the-scenes **Priority** processes run in the background exactly as they would if you'd completed the action manually.
- **Actions are recorded.** Your actions appear in each form's changes log, maintaining full transparency and accountability.

Writing Effective Prompts

aiERP Companion is designed to understand natural language and guide you through each task. To get results faster, follow these guidelines:

- **Be specific.** Instead of "Create a customer," try "Create a new customer for ABC Industries with contact person 'Israel Israeli', Phone no. 03-1234567, Email example@example.co.il."

The more details you provide upfront, the faster you get exactly what you need.

- **Include what matters.** Think about what is needed to complete the task. Creating an order? Mention the customer, parts, and quantities. Running a report? Specify the date range or parameters.

Have all information ready before you start. If you start a new conversation mid-task, aiERP Companion will not retain the information and you will need to start over.

- **Use what is visible.** If you are already viewing a form with relevant information, aiERP Companion picks up that context automatically. You can reference it naturally, e.g., "Create an order for this customer" works when you are in a customer record in the **Customers** form.



- **Stay conversational.** Talk naturally. Ask aiERP Companion to, “Create an invoice for order 12345.” You do not need to use technical syntax such as “INVOICE_CREATE ORDER=12345.”

Safety Measures

- **Editing messages.** Once you send a message, you can no longer edit it.
To change your request, tell aiERP Companion to “Forget and start over,” or you can start a new chat.
- **Collaborative work.** aiERP Companion never performs actions without your permission. You remain in full control of the process at all times.
- **Linear work.** aiERP Companion operates one chat at a time. Multiple simultaneous chats are not supported.
- **Text-based interaction.** aiERP Companion supports conversational text only. It does not accept or create images or files, and does not support OCR technology.

For more information and frequently asked questions on privacy, security, and compliance, see the **Appendix** below.



Appendix A: Privacy & Security FAQ

Does aiERP Companion uses my data to train AI models?

No. aiERP Companion does not use your data for training purposes. Your prompts and responses are processed in real time to help you complete tasks in **Priority**, and this data is never used to train language models.

How long does aiERP Companion stores my chat history?

By default, aiERP Companion stores chat history for technical support and debugging purposes. After 24 hours of inactivity, the chat ends and the history is no longer accessible to users, but the data remains in **Priority**'s system.

What data can aiERP Companion access?

aiERP Companion **can only access**:

- Data within the user's defined privileges.
- Information from the form the user is currently viewing.
- System entities and workflows available to the user.
- Publicly managed payroll regulation information websites in Israel.

aiERP Companion **cannot access**:

- Other users' chats or actions.
- Information from companies or modules outside the user's permissions.

Is my chat with aiERP Companion private?

Your chats follow **Priority**'s data protection standards. Other users cannot see your chats or actions. System administrators can access logs for compliance and troubleshooting purposes. For more information, read the official [Priority Software Privacy Policy](#).

How do I know what aiERP Companion did on my behalf?

Actions completed through aiERP Companion appear in **Priority**'s standard form logs, just like any other action, including what was done, when, and by whom.

Can aiERP Companion access sensitive or classified information?

aiERP Companion only accesses information you are authorized to view. It respects your organization's data classification and cannot bypass access restrictions or sensitivity labels.

Can aiERP Companion search the Internet?

In most cases, aiERP Companion is not integrated with external systems and does not conduct Internet searches. It works exclusively with data within your **Priority**



system. The only exception is the Payroll agent, which has access to a limited list of publicly managed Israeli websites for general payroll inquiries.

What compliance standards does aiERP Companion meet?

All aiERP Companion operations comply with **Priority**'s ERP security standards.

Is aiERP Companion GDPR compliant?

aiERP Companion operates under **Priority**'s data protection standards and complies with GDPR requirements for data processing and user privacy.

How can I provide feedback about aiERP Companion?

Contact your system administrator, who can submit feedback to **Priority** through the appropriate channels.

Can aiERP Companion perform administrative actions?

No. aiERP Companion operates with the same permissions as your **Priority** user account.

To ensure aiERP Companion remains a productivity tool for daily work, rather than a system administration interface, the following safeguards apply:

- aiERP Companion executes actions based on your specific user permissions.
- aiERP Companion cannot access roles or permissions beyond your user level.
- All aiERP Companion actions are subject to your existing **Priority** permissions and restrictions.
- aiERP Companion cannot modify system settings, bypass approval workflows, or access data outside your security clearance.
- aiERP Companion is not allowed to perform administrative actions, such as creating users and deleting operations, even when the user has these permissions.

Can I rely on aiERP Companion for financial or business decisions?

aiERP Companion is designed to assist you with your work in **Priority**, while relying on your verification and approval. It works to provide the best results using the information in your user account, AI can occasionally make mistakes. Always verify results, especially for financial figures, compliance-sensitive data, or high-stakes decisions, using your own professional review.

Who is responsible if aiERP Companion provides incorrect information?

You remain responsible for the actions you take in **Priority**. aiERP Companion confirms proposed actions before executing them, giving you the opportunity to



review and correct before anything is saved. **Priority Software** is not liable for decisions made based on AI-generated output. We recommend treating aiERP Companion as a productivity tool, not an authoritative source for critical business data.

Does aiERP Companion make automated decisions that affect my account or data?

No. aiERP Companion does not act autonomously. It always requests your confirmation before creating, modifying, or running anything in **Priority**. No changes are made to your data without your explicit approval at each step.

Appendix B: Responsible AI

Priority is committed to deploying AI technology responsibly and ethically. aiERP Companion is built on responsible AI principles that guide every aspect of its design and operation.

Our team continuously reviews aiERP Companion for potential risks and implements safeguards to protect users. These include filtering harmful content, blocking inappropriate queries, detecting and preventing data bias, and ensuring transparency in how responses are generated.

We encourage you to review aiERP Companion's outputs critically, verify important information through standard **Priority** processes, and apply your professional judgment to AI-generated content.



Appendix C: Troubleshooting

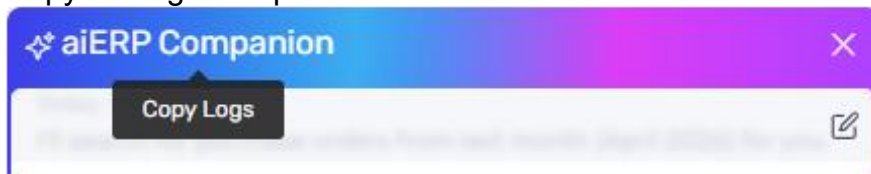
aiERP Companion may occasionally encounter issues due to network configuration, system limitations, or technical problems.

If you encounter an error or unexpected behavior:

1. Hover over the chat icon and copy the **Conversation ID**.



2. Copy the logs and paste into a txt document.



3. Provide both to customer support for troubleshooting.

Error Messages

“It seems an unexpected issue occurred. Try again later.”

A general error that may indicate a temporary server issue or connection problem.

What to do next: - Click the **Try again** button next to the message. - Refresh the page or start a new chat. - Clear your browser cache and cookies. - If the issue persists, contact your system administrator.

“You reached the maximum number of requests in your license. Try again soon.”

You have used all available requests within your current time window and the chat is temporarily disabled.

What to do next: - Wait until your rate limit window resets. - If you believe this is an error, contact your system administrator.

“You reached the maximum number of requests. Consult with your system administrator to upgrade the license.”

Your licensed quota has been fully used. The chat is disabled until your quota is restored. All actions you completed through aiERP Companion are saved in **Priority**.

To resolve this issue, contact your system administrator to upgrade your license.



“Our chat session expired, but don’t worry — I’m still here. Start a new conversation and I’ll be ready to help.”

Your chat ended due to inactivity or time limits (conversations end after 24 hours of inactivity). You can start a new chat. Previous conversation history will not be available, but all actions you completed are saved in **Priority**.

“This conversation has gotten too long for me to continue. Start a new conversation and I’ll be ready to help.”

Your chat has exceeded the maximum length aiERP Companion can process. You can start a new chat to resume the process, but your chat history won’t carry over to the new chat.

Business Process Errors

When **Priority**’s business logic prevents an action, such as missing required information or a validation failure, aiERP Companion displays a conversational explanation of what went wrong.

What to do next: - Read the error message to understand the issue. - Click **Show details** to see the exact error from **Priority**. - Adjust your request based on the guidance provided. - Continue the conversation with updated information.

