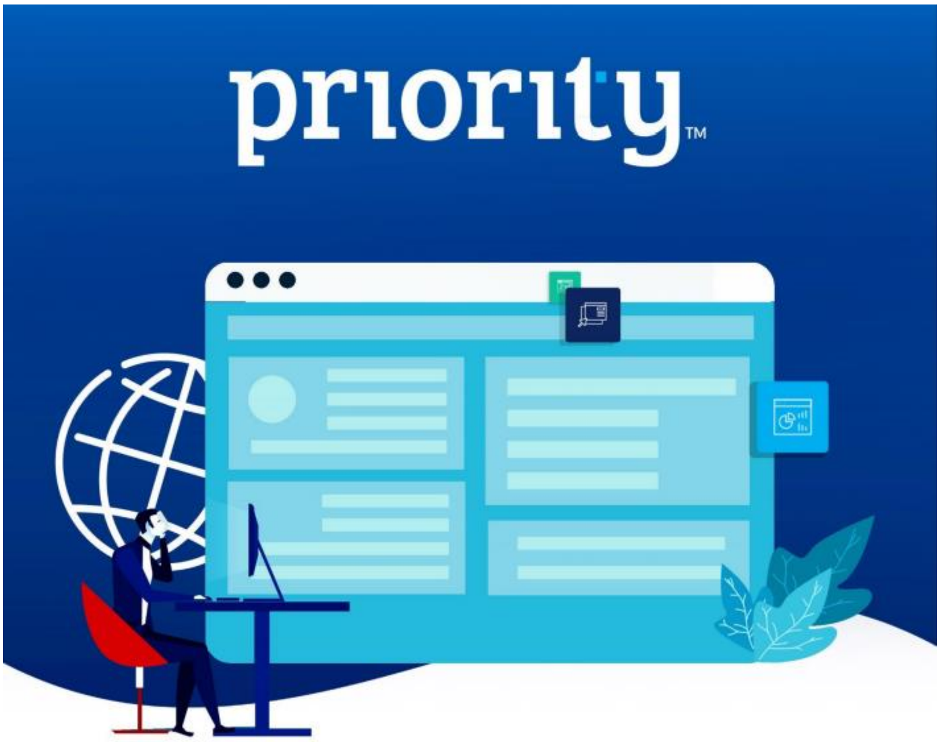

User Interface Guide

V23.0

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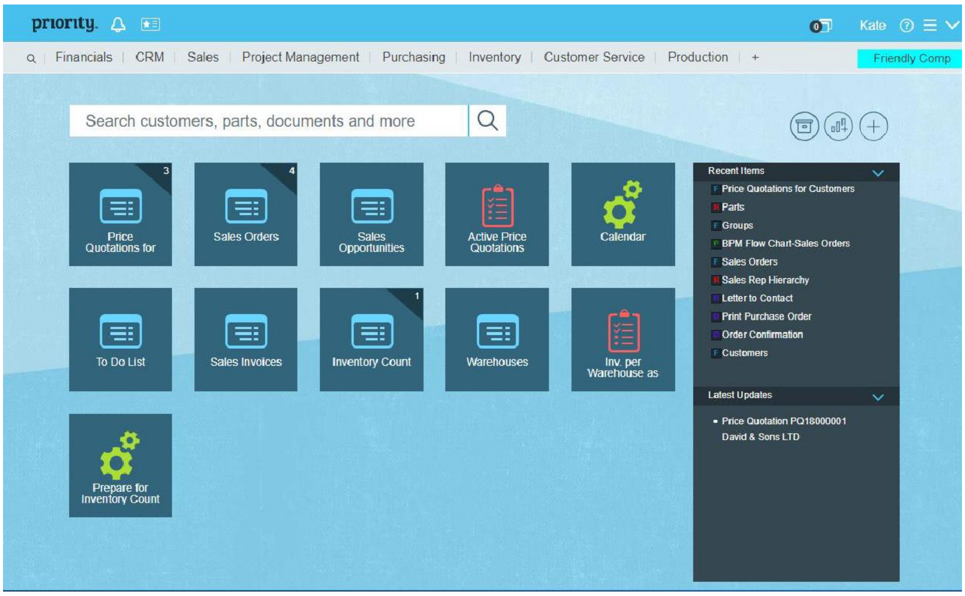
Priority Home Page



The Main Menu appears on the top of the screen. Each menu item represents a **module**, a distinct set of sub-menus that comprise a specific topic, such as **Purchasing** or **Production**. Each ***Priority*** package contains a different combination of modules; thus, your system may not include all of the modules displayed above

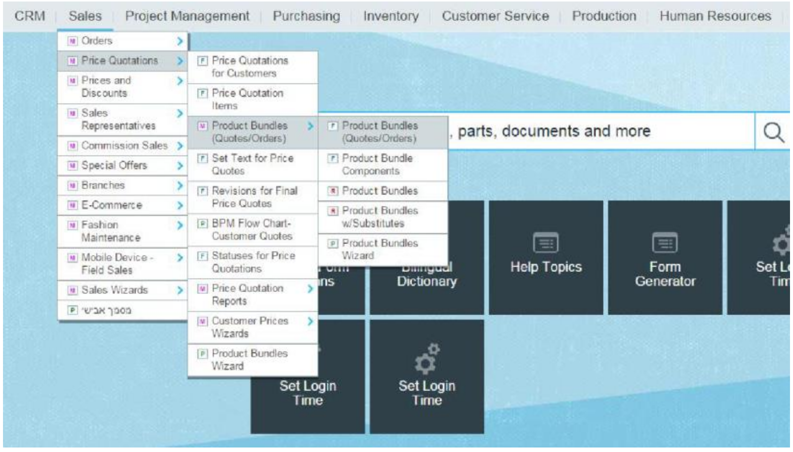
Each menu contains a variety of **entities** from which to choose. There are five types of entities available in the system, each represented by a unique icon:

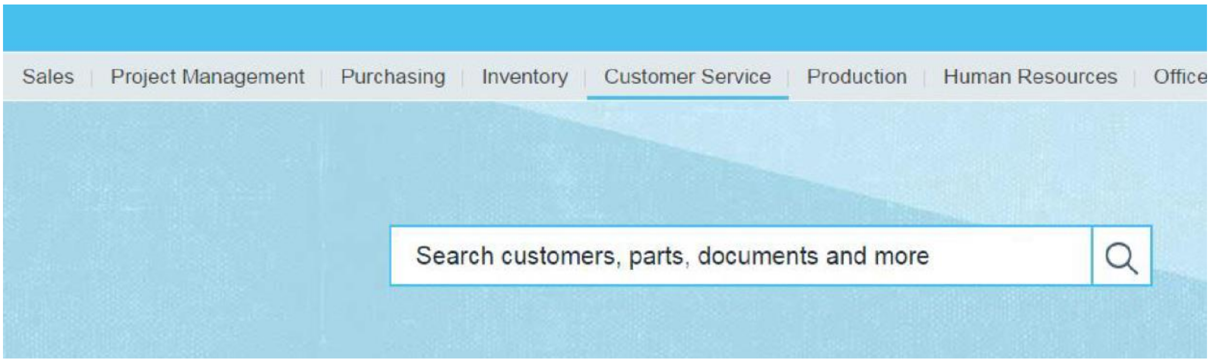
Menu – Opens a sub-menu, displaying all available items.

Form – Loads a form in which to work (retrieve and update records).

Report – Accesses saved reports or runs new ones.

Program – Activates a program**.**
Printout – Creates document printouts.


CRM
Sales
Project Management
Purchasing
Inventory
Customer Service
Production
Human Resources
Orders
Price Quotations
Prices and Discounts
Sales Representatives
Commission Sales
Special Offers
Branches
E-Commerce
Fashion Maintenance
Mobile Device - Field Sales
Sales Wizards
מסמך אבישי
Price Quotations for Customers
Price Quotation Items
Product Bundles (Quotes/Orders)
Set Text for Price Quotes
Revisions for Final Price Quotes
BPM Flow Chart-Customer Quotes
Statuses for Price Quotations
Price Quotation Reports
Customer Prices Wizards
Product Bundles Wizard
Product Bundles (Quotes/Orders)
Product Bundle Components
Product Bundles
Product Bundles w/Substitutes
Product Bundles Wizard
, parts, documents and more
Dictionary
Help Topics
Form Generator
Set Login Time
Set Login Time



The **Search Bar** (**Figure 6**) enables you to locate any document in the system by entering a search term (e.g., the name of a customer or an order number). The autocomplete feature allows quick access to a single document, or you can open a search results form, where a list of the retrieved documents can be viewed, conveniently sorted by document type and displaying the number of results per type.

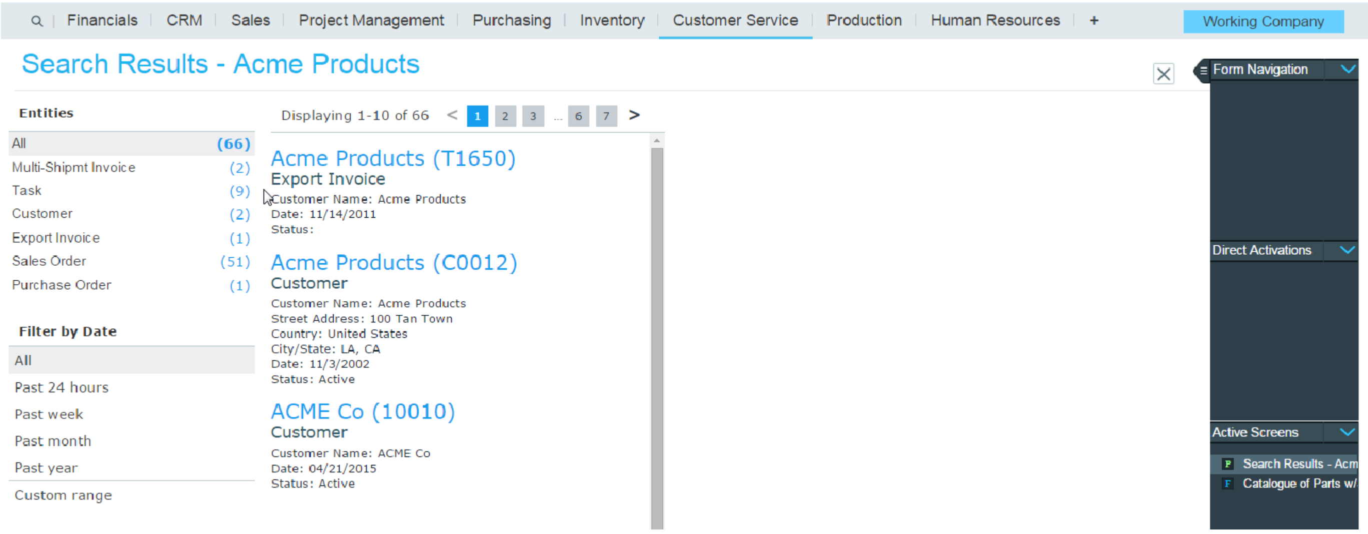
The **Search Bar** can be accessed from the Home Page (located at the centre of the screen) or from the top of any other screen.

Example:

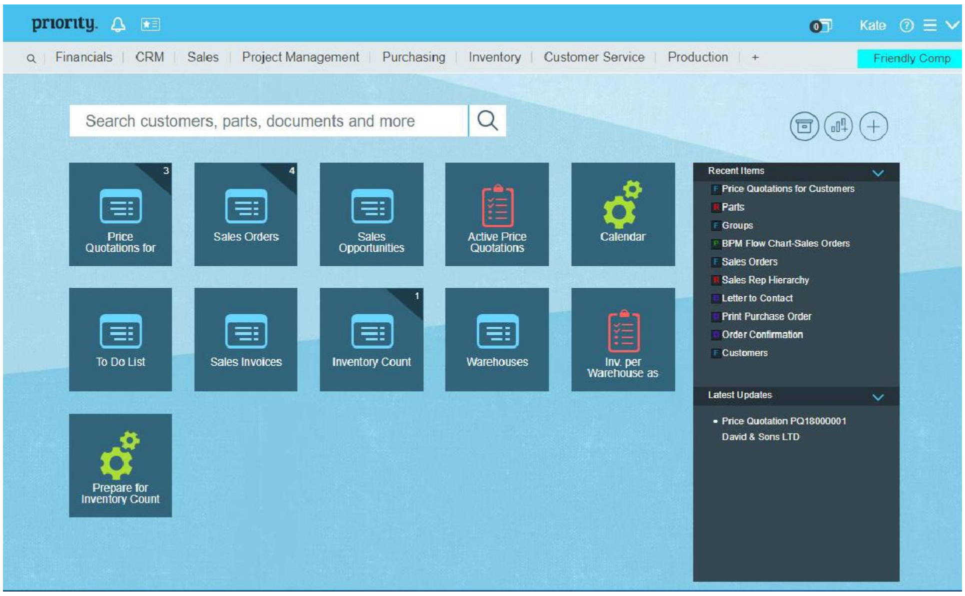
You would like to find the sales order you worked on yesterday for a specific customer:

1) In the **Search Bar**, type in the customer's name or part of it (e.g., Jo).
2) While you type, you will receive the results of the autocomplete (see **Figure 7**). To view a document appearing in this list, click on the desired line or use the keyboard down arrow to navigate to it and press **Ctrl+Enter.**

3) If the document does not appear, click on the **Search Bar** or press **Enter**. A form opens displaying all documents that contain that name (see **Figure 8**). If the list is long, it will be divided into tabs. The right pane displays the types and amount of documents retrieved.
4) To narrow down results to the sales orders recorded for the customer, click on "Sales Orders" in the right pane.
5) To narrow down results by date, select the relevant option under "Filter by Date".
6) Click the desired document; it will open in ***Priority***.
7) Click the **Search Results** program in the **Active Screens** window to return to the **Search Results** form


Financials
CRM
Sales
Project Management
Purchasing
Inventory
Customer Service
Production
Human Resources
+
Working Company
Search Results - Acme Products
Entities
All (66)
Multi-Shipmt Invoice (2)
Task (9)
Customer (2)
Export Invoice (1)
Sales Order (51)
Purchase Order (1)
Filter by Date
All
Past 24 hours
Past week
Past month
Past year
Custom range
Displaying 1-10 of 66
< 1 2 3 ... 6 7 >
Acme Products (T1650)
Export Invoice
Customer Name: Acme Products
Date: 11/14/2011
Status:
Acme Products (C0012)
Customer
Customer Name: Acme Products
Street Address: 100 Tan Town
Country: United States
City/State: LA, CA
Date: 11/3/2002
Status: Active
ACME Co (10010)
Customer
Customer Name: ACME Co
Date: 04/21/2015
Status: Active
Form Navigation
Direct Activations
Active Screens
Search Results - Acm
Catalogue of Parts w/

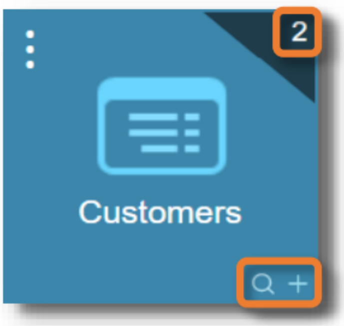
Home Page Tiles



The easiest way to access the entities you use on a regular basis is to assign them to your **Home Page Tiles** display in the centre of the Home Page. You can populate this display with links to the system entities that you use most frequently, such as the ***To Do List*** or the ***Sales Orders*** form.

To add a tile to your **Home Page Tiles**, do **one** of the following:

- Click the icon on the Home Page to open the **Add to Home Page** window. Retrieve the desired entity via the Search window and click **Add**.
- Navigate to the desired entity on the Main Menu. Then, right-click the entity and select **Add to Home Page**.
- You can organize the tiles of your **Home Page Tiles** by drag & drop, to determine the order in which they appear. To remove tiles from the display, hover with your mouse over the upper-left corner of the tile and click the More Options icon. Then click **Delete**.
- A triangle in the upper corner of a tile 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.



- When hovering over a form tile with your mouse, a magnifying glass and a plus sign appear in the bottom-right corner. Click the magnifying glass to open the form in Query mode to retrieve existing records (see p. 58) or click the plus sign to open a new record (if you have defined a query in the form, it will not be run).

Portlets

- You can graphically display up-to-date company data (e.g., open sales orders, purchase orders, profit and loss) in portlets on your home page.
- To add a portlet to the home page: Click the icon and choose the desired topic in the window that opens. The portlet will then appear on your home page.
- 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.

> Notes:
>
> You must have the BI module installed in order to display portlets on your home page.
>
> In order to ensure that invoice portlets display up-to-date data, you need to run the Prep for Inv. Analysis (BI) program (for customer invoices and purchase invoices) on a daily basis. The programs can be run at fixed times by the Tabula Task Scheduler.

Priority Home Page Button

- 
  The ***Priority*** Home Page button, located at the top left of the screen, enables you to return to the Home Page from any form.

Favourites Menu

- 
  The Favourites Menu, located at the top left of the screen , is a personalized list of entities for quick access to forms, programs or reports accessible from any screen.

Priority Talk

- 
  The Priority Talk icon on the upper-left corner of the screen allows you to open the chat and view information regarding documents that you are tracking. The icon displays the number of unread notifications.

Hide/Show Menu Arrow

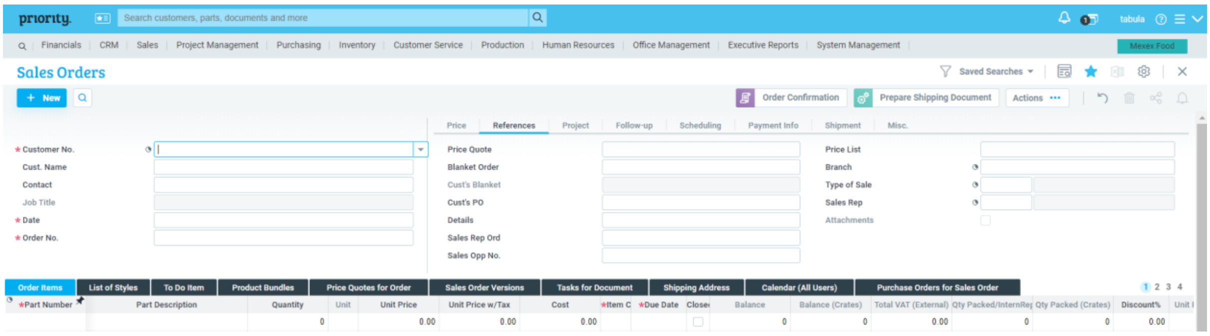
- 
  The menu arrow is located at the top right corner of the screen. When the arrow is pointing upward, the Main Menu is displayed. To hide the Main Menu, click on the arrow; it will invert.

The Help Button

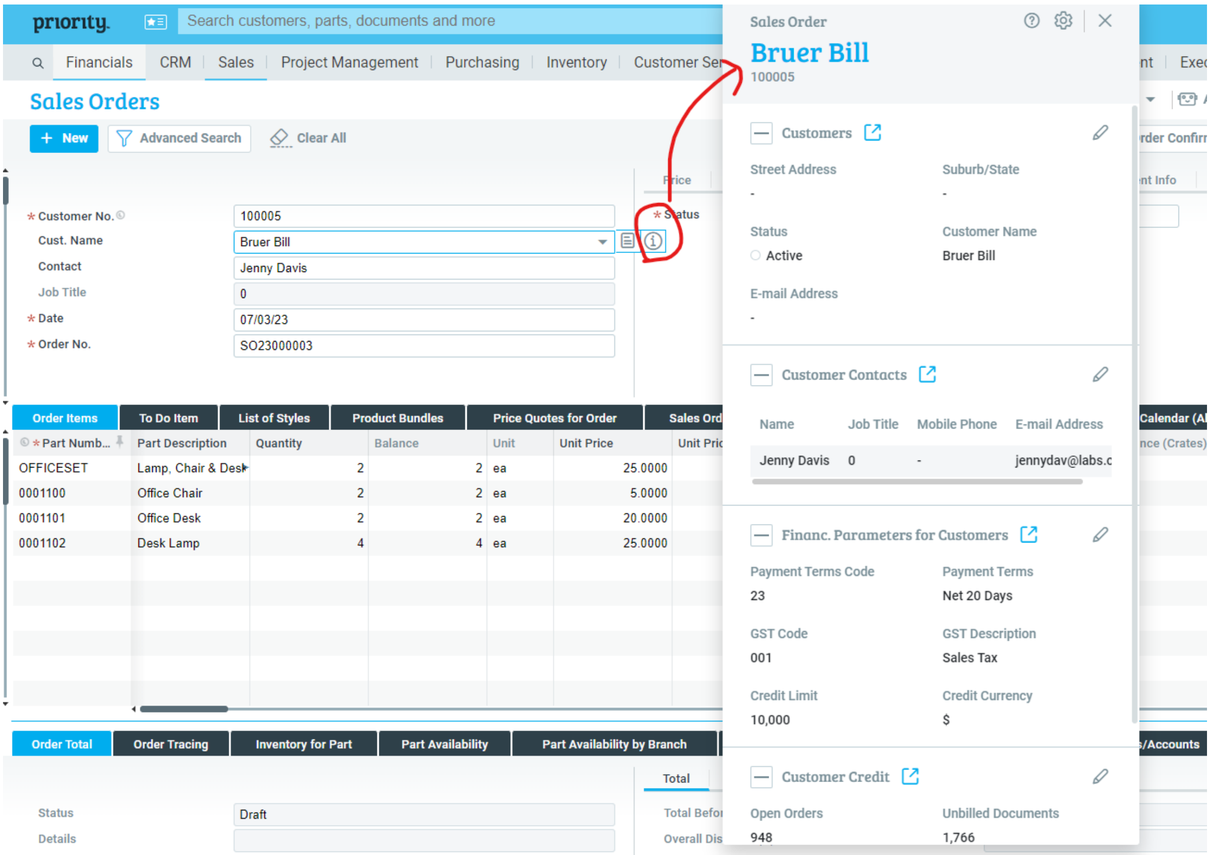
- 

  A shortcut to Help options that help you get started, as well as Online Support and FAQs , is available by clicking on the Help button in the upper right corner above the Main Menu.

Forms



When a form opens, its title is displayed in the upper left-hand corner of the screen. The top section of the form is the active part, in which to record, update and/or view data. At the bottom of the active form appear several sub-level tabs; these open the sub-level forms of the active form, providing additional related data.



When filling out a form, you may want to find more customer or item details recorded in other forms in the system. An easy way to do this is by clicking on the **i** icon, found in every document for the Customer, Part Number, Vendor, and Project fields. A side panel will then open on the right with more relevant details from other forms.

The information in this side panel is organized according to its place in the system, meaning, according to the forms in Priority in which the details are managed. If you want to view the additional information in a specific form, select the arrow icon next to the form name, and it will open.

Form Name Bar

This bar located at the top of a form includes:

- The form name for the current form. When you navigate to a sub-level form, or to another form from within a form this bar displays the path. You can return to any of the previous forms in the path by clicking on their name.

> Note: The length of characters is limited. When it is exceeded, the name of the upper-level form will be replaced with three dots.

Saved Searches

Switch to Query Mode

Add the form to **Favorites**

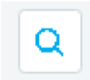
Customize Designs, Rules, Templates and Labels

Export to Spreadsheet

Exit the form (**Esc**).

Actions Bar

Create a new record (Ctrl+Enter)


Create a new search

Two common actions that vary from form to form (image from the Sales Orders form).

An Actions List that contains forms, programs, reports and wizards that are relevant to the current form. To run an action, simply click on its title


Undo the last action (Ctrl+Z)


Delete record (Ctrl+Delete)


Share. Click this icon to access the following options: Send Record Link , Add follower to document, Dial or Skype.


Track document changes in Priority Talk and receive notifications for it

Bottom Bar

The bottom bar provides a number of tools to help you find your place and navigate easily through the system.

The left side of the bar displays:

- The company in which you are currently working.

Note: In some forms, the name of the company's branch will appear alongside the current company.

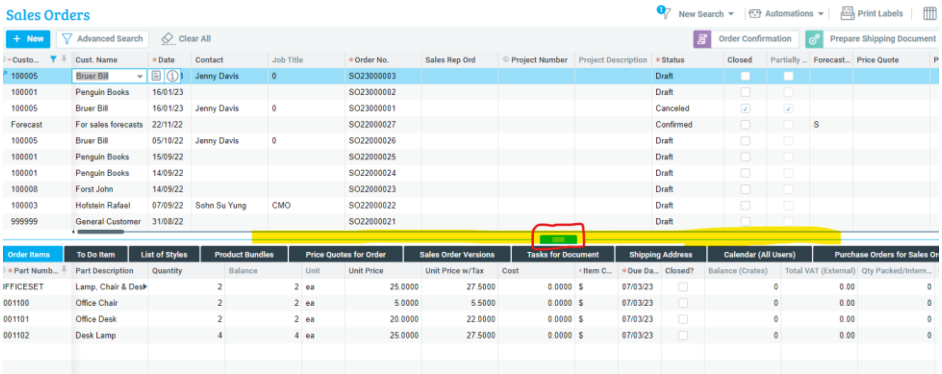
- The number of results and the number of the current record in the list of results.
- The current form column (the form column in which the cursor is located).

The right side of the bar displays:

- Latest Updates – click this component to display all forms that have been recently updated. This component enables you to track changed forms with a single glance and to return to a relevant form to continue working on it with a click of the button.
- Recent Items – click this component to display all entities (forms, programs or reports) that you used recently. To open an entity, simply click its name in the list.
- Active Screens – this component operates similarly to the Active Screens Indicator in the top bar. Clicking on Active Screens, will open a list of all of the forms and programs that are currently in use. To navigate to one of the forms/programs, simply click its name in this list. To close a screen that appears on this list, hover over the relevant form and click the X icon that appears beside it.

Splitter

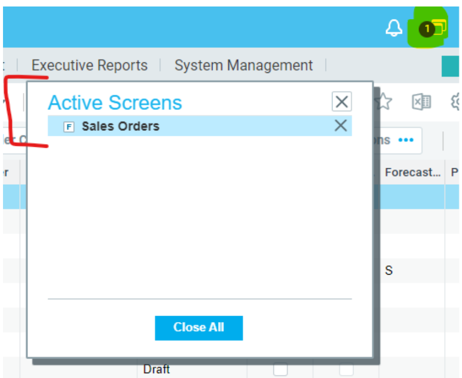
In Multi-Record Display Mode, the splitter appears between upper-level and sub-level forms and between sub-level forms and their sub-level forms.



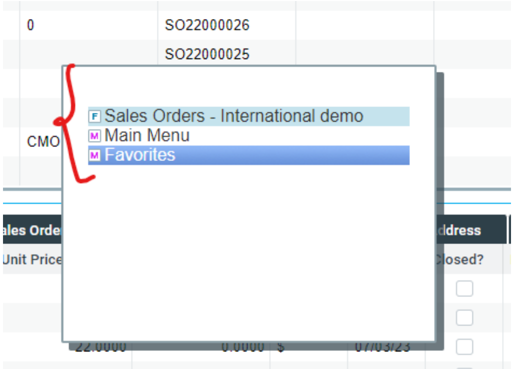
The Splitter enables you to customize your display by adjusting the height of each form. Dragging the splitter towards the top of the screen will reduce the height of the upper-level form, as well as the number of records displayed, while dragging the splitter towards the bottom of the screen will increase the height of the form as well as the number of records displayed.

Active Screens Indicator

The Active Screens Indicator, located at the top right of the screen and in the bottom bar, lists the number of entities that are currently open. To access any of them, click on their title. To close an active screen, hover over the entity and click the X that appears to its right.

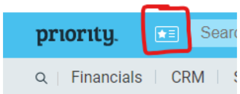


Note: To move between active screens, press Ctrl+↑ or Ctrl+↓



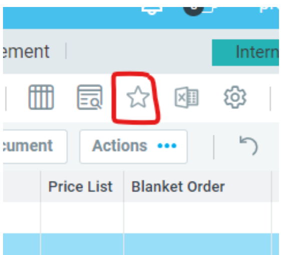
Favourites Menu

- The Favorites Menu, located at the top left of the screen, is accessible from all screens You can add, delete and organize entities on the Favorites Menu at your convenience.

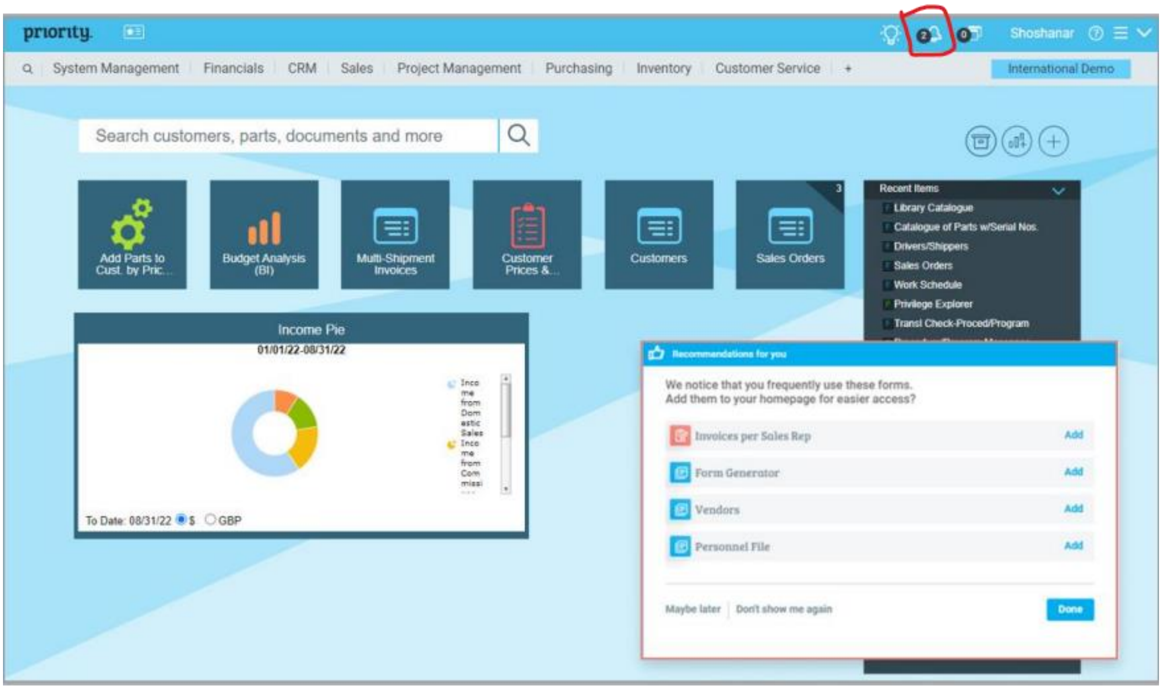


- To add any entity to your Favorites, navigate to the desired entity on the Main Menu. Then, right-click the entity and select Add to Favorites.

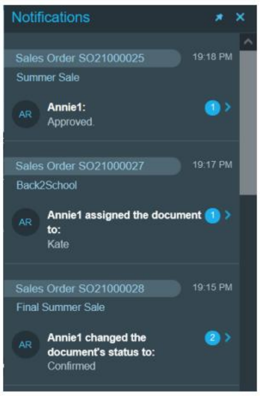
- To add / remove forms to your Favorites from within a given form click the 



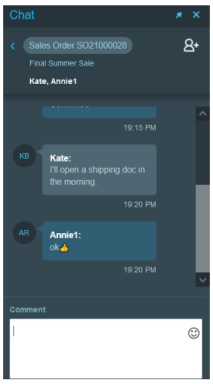
Priority Talk



- The Priority Talk icon, located in the upper-right corner of the screen, is accessible from anywhere in the system. Clicking the icon opens a chat, which allows you to follow changes in the documents that you are tracking and allows you to hold conversations with other users about the documents. The number next to the bell indicates the number of unread notifications for the document.



Priority Talk window



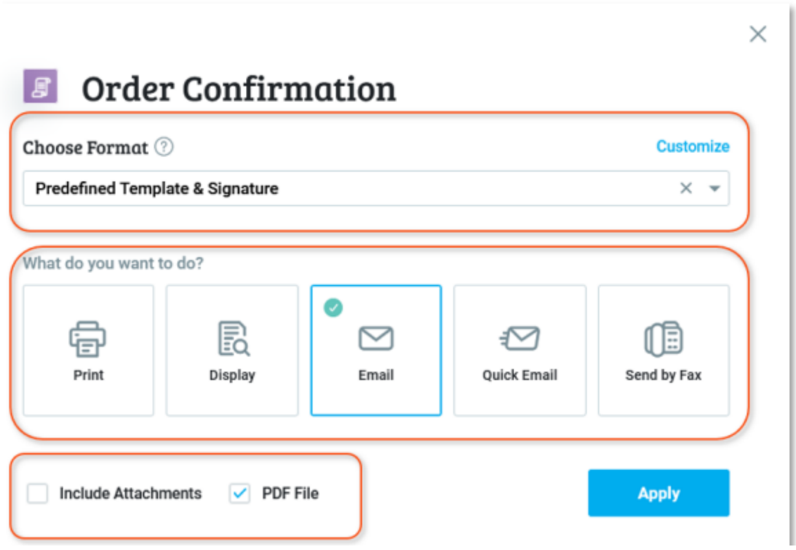
Changes and chat related to a particular record

- Opening the chat displays all the documents that you are tracking. Documents with new notifications appear at the top of the list. The latest notification for the document is displayed under the document number. The time of the notification (on that day) or the date (for notifications recorded on previous days) and the number of unread notifications is also displayed.

1) To open the document, click its number.
2) To view a history of notifications, click the arrow next to the document. The chat window will open displaying previous notifications and a chat box for comments.

- To add users to the conversation, click the add user  icon to open the Chat details window. Click Add user and select the users from the list that opens. Then click OK. Tip: You can select more than one user simultaneously by holding down the Ctrl key and clicking on each user you want to select.
- To stop tracking a document, click the  icon in the **Chat details** window.

Document Print/Send Options



- One of the most common actions, is to produce a document printout to send by email to the customer, or to print for shipping, or to be manually signed. Such actions will appear next to the icon. After clicking on the relevant action, the printout dialogue box opens:

- **Print**: Send the report to your printer.
- **Display**: Opens the document in Priority.
- **Mail**: Opens an e-mail message in the Compose Mail form with the document as an attachment.
- **Automatic Mail**: Sends an e-mail to the designated contact with the document as an attachment (without opening the Compose Mail form).
- **Automatic Fax**: Faxes the document to the designated contact (without opening the Compose Mail form).
- **PDF File**: Saves the report as a PDF file and displays it in Adobe Reader or sends it as an e-mail attachment (depending on whether you select Display or Mail).
- **Quick Print**: Sends the report directly to a pre-defined printer, specifying the desired number of copies. Note: Flagging this option when printing a report sends the report to the default printer.
- **Incl. Attachments**: includes attachments that have been linked to the record in question when printing or sending a report (e.g., as Mail).

Forms

Introduction

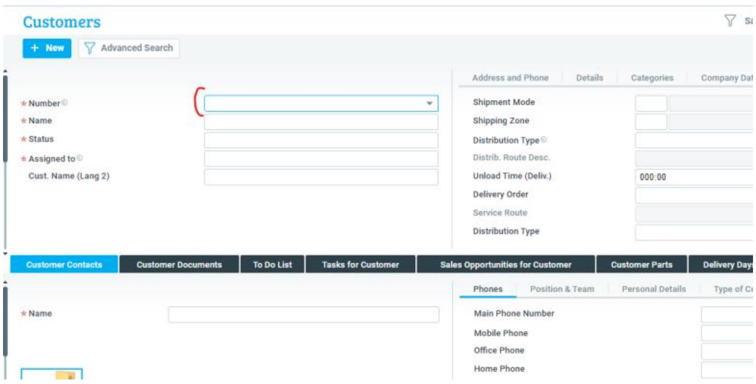
Most of the work in the system is carried out by means of forms. You can use a form to add new data to the system, as well as to retrieve existing records for review and/or revision. Proficiency in the use of forms is an important first step in learning to use Priority. From the application forms you can run programs, print reports, and send documents via fax or e-mail. Before giving you an in-depth explanation of how to work with forms, the following provides an overview of the basic concepts you need to know:

Each record in a given form is made up of several columns. Information specified for one column within a given record constitutes a field.

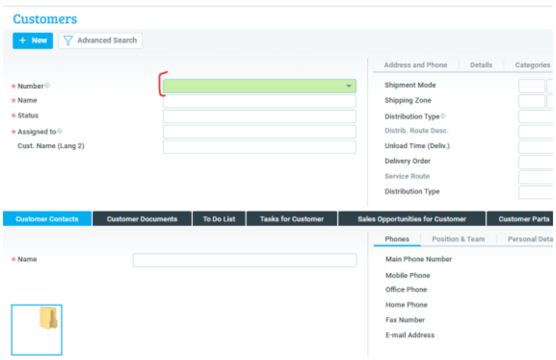
Most of the basic forms used for data entry initially appear in Multi-Record Display Mode, which displays all of the form's records in a single table. This mode is particularly useful for viewing retrieved data. However, if the form is wide, some of the columns will be hidden until you scroll to them. For a detailed view of a single record, you can toggle to Full-Record Display Mode or Focus Mode. These modes feature a friendly graphic interface that divides the form's columns into tabs.

In addition, forms have two primary modes of operation:

- Data Entry mode, in which you can record new data and update existing records,



- and Query mode f11, in which you retrieve data.



You can quickly move between these modes as you are working.

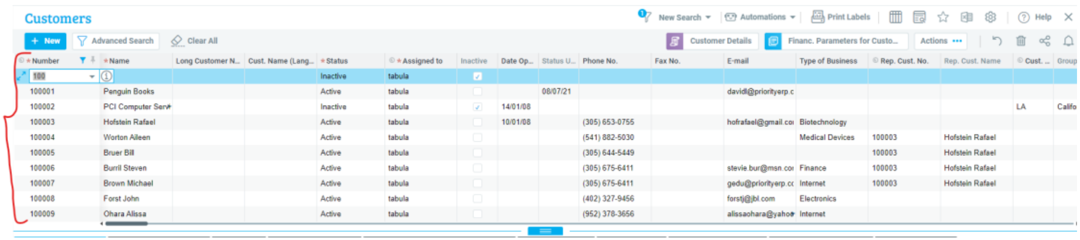
There are two non-exclusive types of forms: upper-level forms and sub-levels. An upper-level form is one that has at least one sub-level. Sub-level forms provide further information on a given record in the upper-level form. For instance, the Customers form, which stores customer names, mailing addresses and phone numbers, can have one sub-level that displays sites for each customer and another sub-level that displays all orders placed by the customer. Root forms are upper-level forms that are accessed directly from menus.

Data Form Layouts

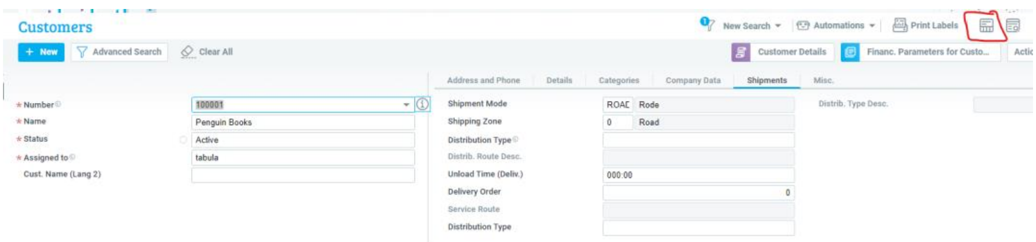
Most of the work in the system is carried out by means of forms. You can use a form to add new data to the system, as well as to retrieve existing records for review and/or revision. Proficiency in the use of forms is an important first step in learning to use Priority. From the application forms you can run programs, print reports, and send documents via fax or e-mail. Before giving you an in-depth explanation of how to work with forms, the following provides an overview of the basic concepts you need to know:

Each record in a given form is made up of several columns. Information specified for one column within a given record constitutes a field.

Most of the basic forms used for data entry initially appear (by default) in Multi-Record Display Mode, in which multiple records are presented at a time. This mode appears similar to a spreadsheet that people are familiar with, where all of the form's records appear in a table. This mode is particularly useful for viewing retrieved data, and many forms open directly in this mode. However, if the form is wide, some of the columns will be hidden until you scroll to them.



In order to see a single record at one time, you can toggle to Single-Record Display Mode, which features a friendly graphic interface that divides the form's columns into tabs.



Switching between Single and Multi-Record views can be temporary or can be made the default view in particular forms that suits the users preferred use.

Switching between Single Record and Multi-Record views can be made temporarily by pressing the icon or made the preferred view by ***pressing F4***

Forms have two primary modes of operation:

- Data Entry mode, in which you can record new data and update existing records, and
- Query mode, in which you retrieve data.

You can quickly move between these modes as you are working.

To switch to a query, ***press F11***. The field will turn GREEN

To switch from Query to Data Entry mode, ***press ENTER***

Moving Within a Form in Full-Record Display Mode

To move within the current record, simply click on the desired field with the mouse. Alternatively, you can use the arrow keys or press Enter, Tab or Shift+Tab (to go backwards).

To move between tabs, press Shift □ and Shift □, or press Tab to move from the last column in one tab to the first column in the next.

Note: To move between the main section and the first tab, it is sufficient to use the □ key.

To move between records, use the PgUp and PgDn keys, the vertical scroll bar at the left of the form or the scroll button on your mouse.

Moving Within a Form in Multi-Record Display Mode

To move between rows, you can:

- Click on the desired row with the mouse.
- Use the vertical scroll bar to the left of the form.
  Note: The current form line is displayed whenever the cursor is placed over this scroll bar.
- Use the up/down arrow keys □□.
- Press Enter to move to the next field.
- Use the scroll button on your mouse.

Note: As you move from one row to another, the current row becomes passive: that is, the column you are in changes colour.

To move between columns within a row, you can:

- Click on the desired field with the mouse.
- Use the left and right arrow keys □□.
- Press Tab or Enter to move one column to the right, Shift+Tab to move to the left.

In a form with many columns, not all can be viewed at once. The tack that is attached to one of the first form columns determines the part of the form you continue to see as you keep scrolling to the right. You can drag that tack to any column in the form and that column – together with all columns to the left of the

tack – will remain visible when you navigate to the hidden columns to the right.

Data Entry

When you first enter a form, you are in Query mode, in which you retrieve records. To switch to Data Entry mode, in which you can record and update data, Press Enter. The very first field (first column, first line) is highlighted. In most cases, no data is visible in the form columns.

Read-Only and Updateable Columns

Any column in a form is either read-only or updateable. Some updateable columns are mandatory.

> Note: A mandatory column must always be filled in. If it is not, you will not be able to update the record or continue work in the form. If you get stuck in a record (because you don't have all the needed mandatory information), you have to undo your actions or clear the line.

Priority features several visual cues to help you differentiate between types of columns. Mandatory columns are marked with a red star★. Read-only columns are gray.

Adding Records to an Empty Form

To add a new record in a form in which no data is displayed, simply type in the information you wish to specify (or copy it from elsewhere; see below). If you have typed incorrectly, you can backspace and correct the error. Make sure that all mandatory columns are filled in.

You can edit what you have typed by using **one** of the following methods:

- Highlight and overwrite:

1. Drag along the written text with the left mouse button to highlight any portion that was incorrectly typed.

2. Type in the correct characters. Anything highlighted will be overwritten.

- Type in Replace mode:

1. Switch from **Scroll** mode to **Edit** mode (press **F2**).

2. Use the left and right arrow keys ⍰⍰ to move the cursor within the field.

3. Switch from I**nsert** mode to **Replace** mode (press **Ins** on the keypad) to overwrite any incorrect character.

As soon as you add a new record and ***leave the line***, the database is updated automatically. This occurs when:

- You move the cursor to any other line in the form.
- You move to Query mode.
- You exit the form.
- You enter a sub-level form.

Choosing a Value From a Choose List

To choose the desired value, simply locate and click on that value. All Choose lists also feature the following two mechanisms, which are designed to speed up the selection process:

- Sorting mechanism: You can sort a Choose list in ascending or descending order by clicking on the list title.
- Choose pattern field: You can use the choose pattern field appearing at the top of the Choose to help you locate a particular value. Initially, this field is filled in with the first value appearing in the Choose list, and that value is highlighted. If you begin recording the first few letters of the desired value in this field, the system automatically jumps to the first line matching the recorded string. Once the cursor is on correct line, press **Enter** to choose that value. The remaining text is filled in automatically.

Data Retrieval (Queries)

Up till now, you have practiced entering new records into the database. The current section explains how to retrieve existing records in a given form so that you can view and/or revise them. This is in addition to the option of using the Search Bar to find a given record.

As you've already seen, the easiest way to access existing data is to retrieve all records. To do so, click the Options Menu button, click Run and select Retrieve All Records. This method, however, is apt to be unnecessarily time-consuming once you have a great many records in a given form. In that case, it is advisable to narrow down the retrieval procedure, based on query conditions (also known as retrieval criteria).

Priority provides a variety of techniques for retrieving selected data in the system's forms. By switching from Data Entry mode into Query mode, you can define any combination of query conditions by which the desired data is retrieved when the query is executed.

Alternatively, you can run the Query Generator, which features a friendly interface for defining query conditions, setting data-sorting parameters, executing queries and storing frequently-used queries for easy access.

Working in Query Mode

There are two modes of working with Priority forms: Data Entry mode for recording data and Query mode for retrieving records. When you are in Query mode, the column in which the cursor is located is highlighted in green. To move from Data Entry to Query mode, do one of the following:

- Click in the row of shortcuts.
- Press F11 or Ctrl+R.
- Click the Options Menu button, click Run and select Query/Clear Form.

If you are working in Multi-Record Display Mode, your cursor will be in the second row of the form, and all the other rows will be blank.

To exit Query mode without retrieving any data, simply press Enter.

> Note: Query conditions are always designated in the second row of a multirecord form; the first row is reserved for operators.

Designating the Query Conditions

The simplest type of query is one in which you seek to retrieve all records that contain any value in one or more specific columns. For this you can use the asterisk (*) symbol, known as a wildcard, because it represents an unknown quantity of records.

To retrieve all records that contain a value in one or more specific columns:

3) In Query mode, move to the desired column and type in an asterisk.
4) Repeat the process for additional columns, if necessary.

A narrower type of query is one in which you seek to retrieve all records that contain a particular value in one or more specific columns.

To retrieve all records that contain a given value in one or more specific columns:

5) In Query mode, move to the desired column.
6) Specify the desired value, either manually, by Choose list or by Search list.
7) Repeat the process for additional columns, if necessary.

The third type of query is one in which you seek to retrieve all records whose values in a given column satisfy a certain condition. This is where the asterisk wildcard is most useful, because it can be used in conjunction with a string of characters, such as a prefix or suffix. For example,

if you type 50* in the Part Number column of the Part Catalogue, you will retrieve all parts whose numbers begin with 50 (e.g., 501-101, 501-102).

Note that this kind of query condition is always case sensitive. Note: If you want to record a query condition with a string that includes an asterisk (*) as an actual character, use the backslash "\" as a delimiter. For example, to retrieve all records that contain an asterisk, type ***.

Executing the Query

To execute a query, do one of the following:

- Press Enter.
- Click the Options Menu, click Run and select Execute Query.

Following execution of the query, the retrieved records will be displayed on screen and you will move automatically from Query mode back to Data Entry mode. It is now possible to update any displayed records.

Note: If you are working in Full-Record Display Mode, you will only see the first of the retrieved records. Use the PgDn key or the vertical scroll bar to view the rest of the retrieved records.

Examples:

In the Currencies form, move to the Currency Name column and try out the following conditions (remember to enter Query mode by pressing F11):

8) Type P*. You will retrieve those records whose currency name begins with the letter “P” (Pounds Sterling, Price Index).
9) Type I*s. You will retrieve any currency whose name begins with “I” and ends with “s” (e.g., Italian Liras).
10) Type *n. Any currency whose name ends with the letter “n” will appear (e.g., Yen).
11) Type D*M*s. This will retrieve any currency that begins with “D” ends in “s” and has an “M” in the middle (Deutsche Marks).
12) Type *Francs. You will retrieve the records for Belgian Francs, French Francs and Swiss Francs.

Whereas the asterisk replaces an entire string of characters, the question mark is a wildcard that replaces a single character. It is generally used in conjunction with one or more characters and may even be combined with the asterisk.

Examples:

13) Type Y?? in the Currency Name column. You will retrieve any currency that is three characters long and begins with “Y” (i.e., Yen).
14) Type D?ll?r?. You will retrieve the record for Dollars.
15) Type *i?g. This will retrieve any currency whose name begins with any string of characters, followed by an “i”, followed by any single character, and ending in “g” (e.g., Pounds Sterling).

Sorting Retrieved Records

The records that are retrieved in a form are sorted by one or more columns, determined by the designer of the form. This is the default sort. However, when in Multi-Record Display Mode, you can re-sort records after they have been retrieved.

Clicking once on the title of any column gives you an ascending sort; click

again, and the data will be sorted in descending order. A further click repeats the ascending sort. A small triangle appears below the column title when you perform a sort – if the sort is ascending, it points up; if descending, it points down.

You can also generate an ascending sort by right-clicking a column (or pressing the Menu key) and selecting Sort from the pop-up menu; select it a second time to obtain a descending sort.

Note: User sorts are always temporary and apply only to the specific query; sort conditions always return to the default each time you execute a new query.

Hiding Retrieved Records

Occasionally, after retrieving a number of records, you may prefer to view only some of them. You may “hide” certain records so that they are not displayed on the screen, although they continue to exist in the database (that is, the records are not deleted).

Records are hidden by clearing the line. There are four ways to do so:

- Press F7.
- Click the Options Menu button, click Edit and select Clear Line.
- Right-click any field in the line and select Clear Line.
- Press the Menu ( ) key and select Clear Line.

To view hidden records again, simply retrieve them anew.

Sub-level Forms

The forms in which you have worked until now were all upper-level forms (or root forms) entered directly from the menu. Most root forms have at least one sub-level form connected to them. Sub-level forms provide further information on a given record in the upper-level form. For each single record in the upper-level form, multiple records may appear in the sub-level.

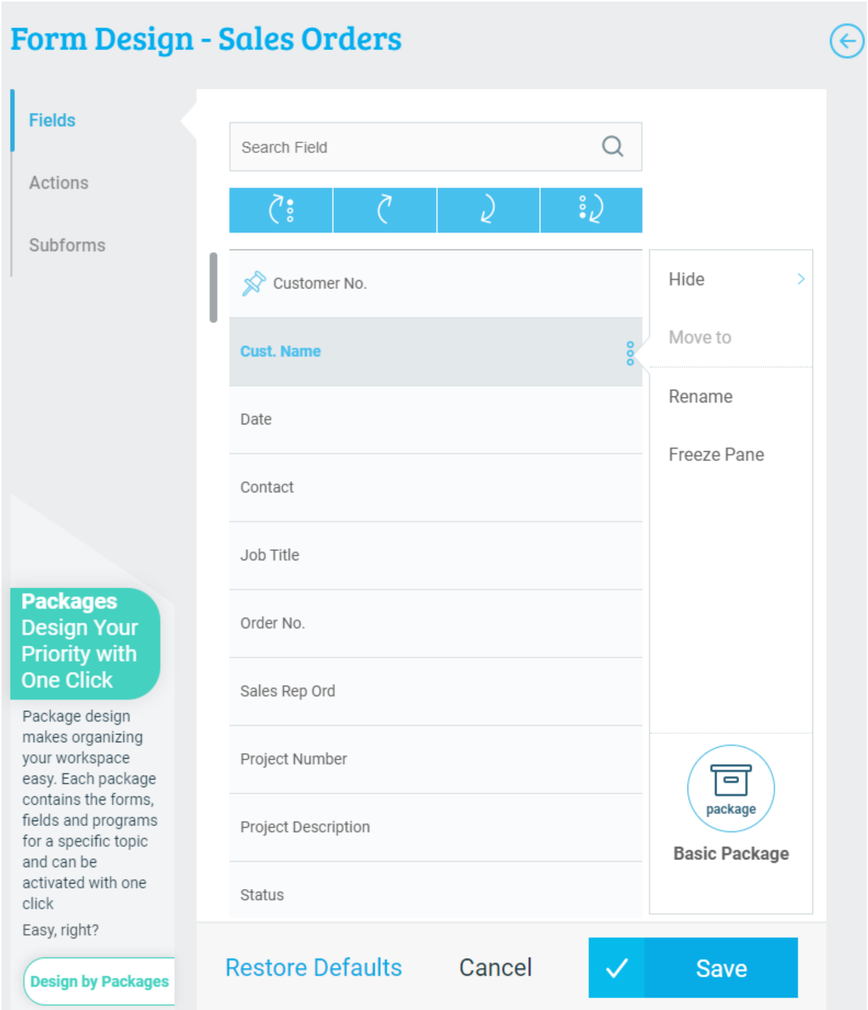
The line in the upper-level form must have data in it.

To return to the upper-level form from a sub-level, do one of the following:

- Click anywhere in the upper-level form, using the left mouse button.
- Press Esc.

Customizing Forms

- The form design tool handles three different modes of form design – form columns and tabs, sub-level forms, and direct activations. This tool can be accessed through the Design menu, opened from the Options Menu, or by right-clicking any form column and selecting Design.
- In any mode, use the Design Tool search box to find the column, direct activation, or sub-level form in which you want to change the design.
- If the form in question is currently open in Multi-Record Display Mode, the Design Tool simply displays the full list of form columns in order of their appearance. In Full-Record Display Mode, the Design Tool displays a list of form tabs, each of which opens to display its constituent columns



- In this mode, you can make extensive changes to the appearance of the form, such as:
  - Hiding or renaming individual form columns. A column that was hidden manually will be represented by the icon, while a column hidden as part of a package will have the icon.
  - Renaming tabs and rearranging their columns
  - Moving columns from one tab to another
  - Changing the order of tabs, and
  - Creating a new tab and populating it with columns taken from other tabs.

Input to Reports and Programs

Parameter Input Most programs and reports require user input. Among other things, this input determines the records that will be affected by the program or the records that will be displayed in the report.

User input is designated via the pop-up parameter input screen (Figure 68), which is comprised of one or more columns, some of which have both righthand and left-hand input windows. The right-hand window is for inputting values; the left-hand one is for selecting operators (where relevant).

Use the mouse, Tab key or ↑↓ arrow keys to move between input columns. Do not press Enter until you have finished specifying all input.

When an input screen opens, it displays the parameters that were used the last time the program was run. If you are not interested in using these parameters, click the Clear button and enter new ones.

Parameters must be designated in at least one column in each input screen. This is why the first input field in each screen features the default "*" wildcard (see Figure 68), despite the fact that an empty input field achieves the same effect (i.e., inputs all records).

The exception to this rule is an input field that requires a single value (e.g., From Date, To Date), in which case input is mandatory and blank fields are invalid (see Figure 69).

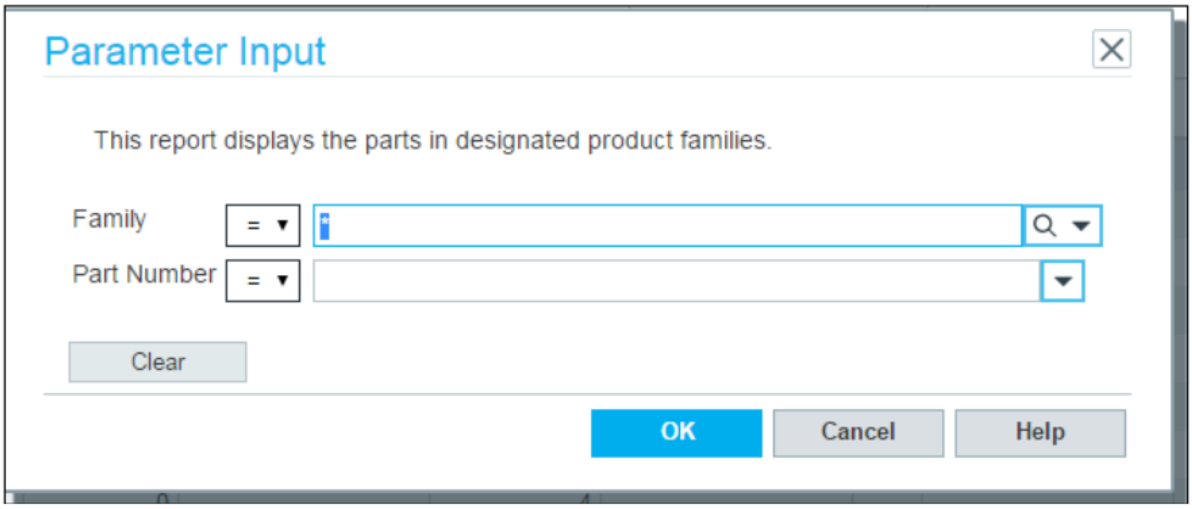


Figure 68: Standard input screen with wildcard

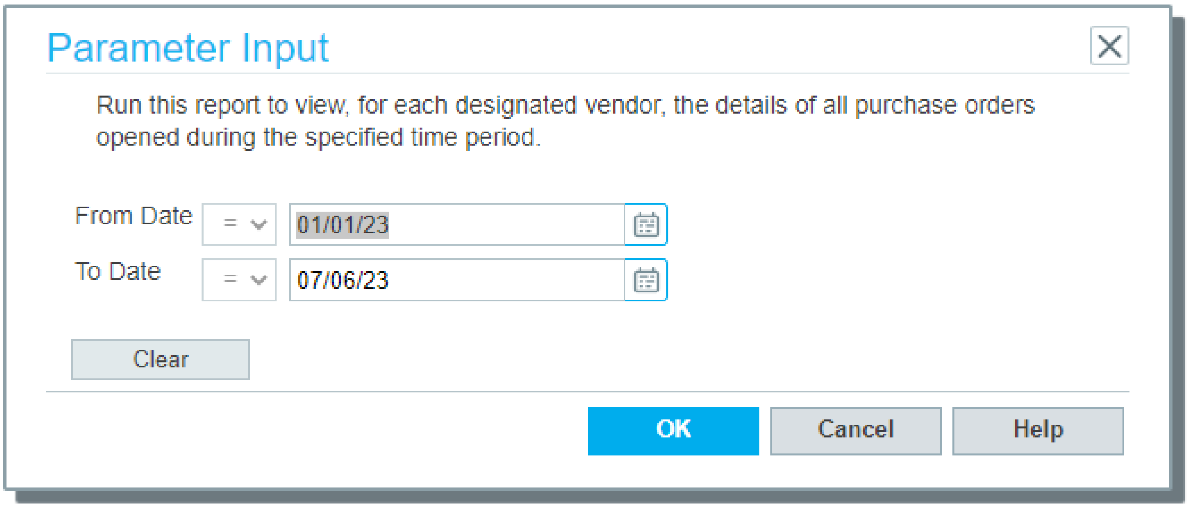


Figure 69: A single-value input screen

If you are not sure how to fill in a certain column, put your cursor in the input window next to the column in question and do one of the following:

- Click the Help button at the bottom of the screen.
- Press F1.

You will notice that the columns in the parameter input screen are like columns in forms:

- Some have an arrow that opens a Choose or Search list (see pp. 39-42). Input values can be taken from this list.
- The left-hand input window has an arrow that opens up a selection of operators.
- Date columns have a pop-up calendar (see p. 47), from which a date can be selected.
- Columns from which you can access a target form (so as to select records) display the button.

Note: Clicking the calendar icon (or pressing either F6 or the Space bar) opens a list of relative dates (e.g., yesterday, next month). Right-click the calendar or press Shift+F6 to open the standard pop-up calendar.

Now confirm your choice by clicking OK or pressing Enter. Sometimes a second input screen will appear. In that case, input the second round of parameters and confirm your choice.

Note: The next time you run the program or report, the screen will display whatever the input was for the previous run.

To illustrate how this works, we will practice the procedure when running the Daily Exchange Rates report. Note that, if no exchange rates have yet been recorded, the report will be empty of values. As you are merely practicing parameter input, this is unimportant. It is recommended, however, that you delete the values you have input (use the Backspace key) or cancel parameter input (click on the Cancel button) after each trial, before beginning again.

Note: If you accidentally click OK or press Enter, you will not do any harm. You will just have to wait for the system to attempt to produce the report and notify you that there are no values.

Use the Search for Entity feature (p. 12) to find and run the Daily Exchange Rates report. The parameter input screen that pops up requires you to specify the currency (or currencies) to be included in the report, as well as the range of dates that are covered. We will concentrate on the Cur input column, in which the currency code is designated.

Specifying an Exact Value

The simplest way to input data is to provide an exact value. So, if you want to run the report for Euros, select EUR from the Choose list that opens from the right-hand input window of the Curr column (see Figure 70). To run it for Pounds Sterling, select GBP from the list. You would consequently obtain a report of all exchange rates for the Euro (or Pounds Sterling) over the range of dates specified

The problem with the above method is that it only allows you to run the report for a single currency. A more useful method is to designate a pattern, using wildcards or operators.

Note: In some cases, such as the From Date and To Date columns, only a single value is permitted.

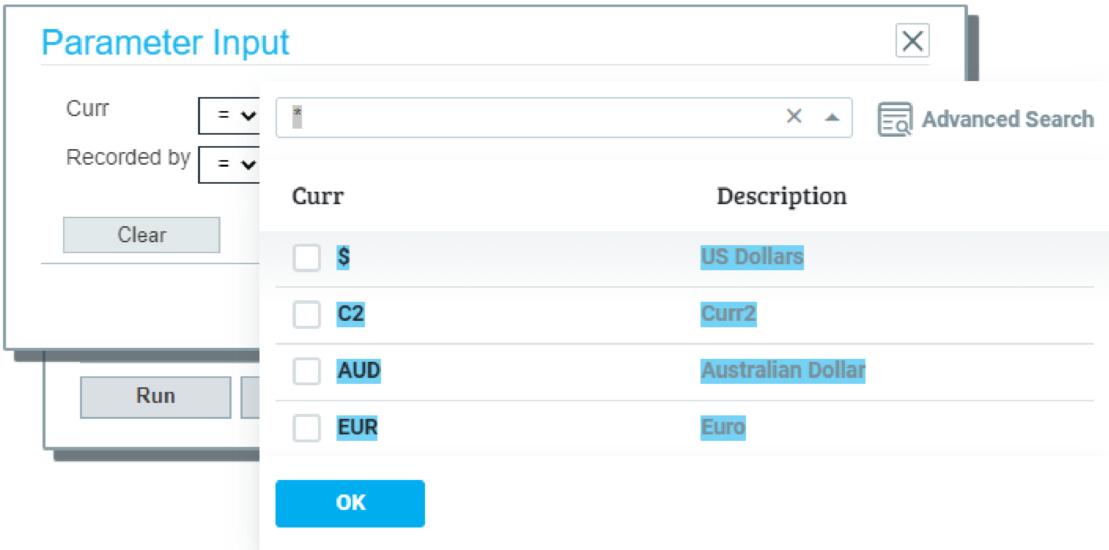


Figure 70: Inputting a single currency for the Daily Exchange Rates report

Designating a Pattern

One way to input several records at once is to specify search conditions. You can include any of the wildcards or operators used to retrieve records in a form (see p. 174).

Examples:

- To run the Daily Exchange Rates, report for all currencies, leave the * in the right-hand input window of the Curr column (this appears by default).
- To input all currencies whose code begins with the letter “F”, type: F*.
- To input all currencies whose code begins with “C” and ends in “P”, type: C*P.

Operators are generally more useful in a column displaying a date or number. You will notice that the left input window has an arrow. To change the default equal sign (=) to another operator (such as <=, >, >=, <>, -), click on the arrow and select the desired symbol.

> Note: The operator button is disabled in any column in which a single input value is required (e.g., the From Date and To Date columns in this report).

You can select multiple values for a given input column, either as discrete values (the | operator) or as a range of values (the - operator):

- OR: Click on the arrow next to the left input window and select the vertical bar (|). The input column in question is duplicated. Input the desired values, one in each input column. When the report is run, data meeting either criterion is displayed.
- BETWEEN: Click on the arrow next to the left input window and select the hyphen (-). The input column in question is duplicated. Input the first value in the range in the left input column and the last value in the range in the right input column (see Figure 71). When the report is run, only data that falls within the designated range of values is displayed.

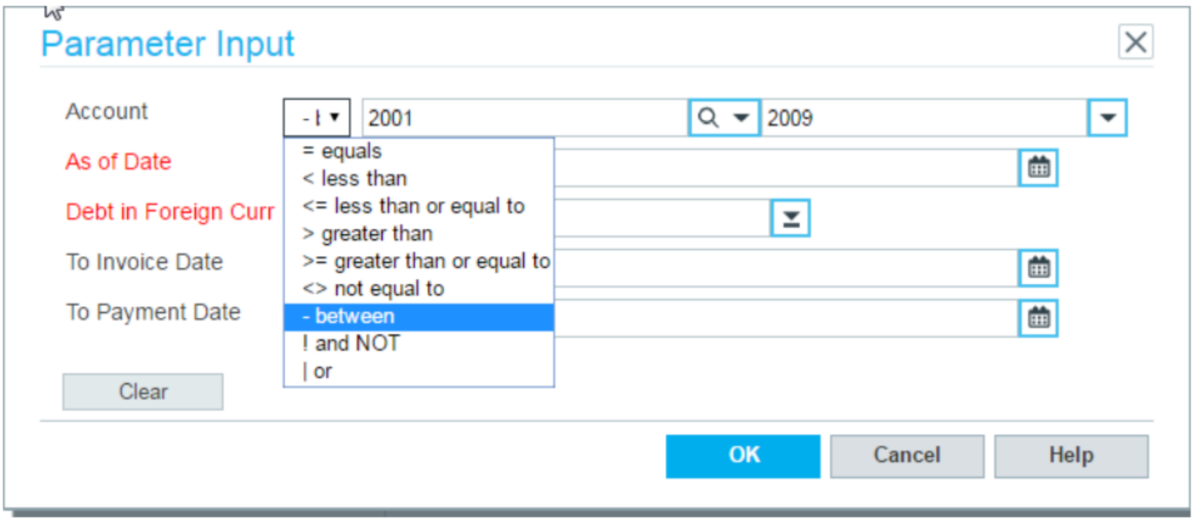


Figure 71: "Between" operator

You can also input all records that match a given criterion, while excluding those that match a second criterion, by selecting the! operator. Consequently, the input column in question is duplicated (see Figure 72), enabling you to specify the criterion for inclusion in the left input column (e.g., 2*) and the criterion for exclusion in the right input column (e.g., 21*). In the example provided, the result will be all records that begin with the number "2", except for those beginning with the numbers "21".

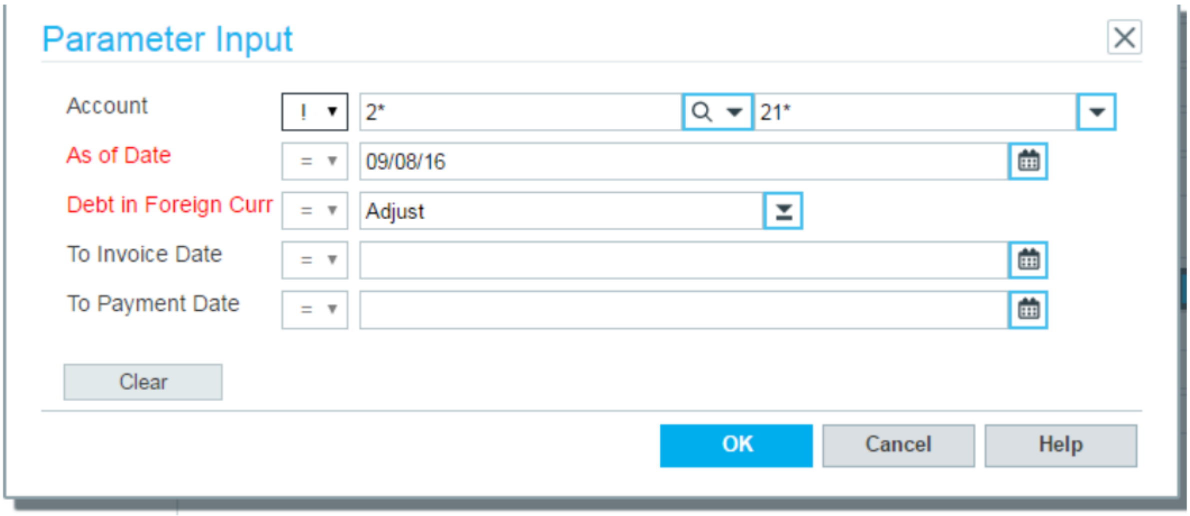


Figure 72: "And NOT" operator

Inputting a Batch of Values

Suppose you want to run the report for a group of currencies that cannot be easily represented by a pattern (e.g., Euros, AUD, and US). In this case, you need to select the records in question from a target form.

To access a target form in a Choose list, do one of the following:

- Place the cursor in the input column (Curr) and press F6 twice.
- Open the Choose list (by clicking on the arrow) and then press F6 from within the list.

To access a target form from a Search list, do one of the following:

- Place the cursor in the input column and press F6 twice.
- Open the Search list (by clicking on the arrow) and then click Advanced Search (or F6) from within the list.

Note: Clicking the Select Values icon (that appears next to some input columns) also accesses a target form. In certain input screens, this is the only method available (i.e., there is no Choose or Search list).

The target form (Currencies, in this case), opens in Query mode so that you can easily retrieve the currencies you wish to appear in the report. You can “Hide” any unwanted records that appear by pressing F7 on the line of every unwanted currency.

Once all desired records appear in the form, click the arrow next to the Choose Value button and choose Select All; or press Esc. In the Back to Input window that opens, click OK. You will return to the parameter input screen. Any records displayed in the form at the time it was exited will be considered part of the input batch. A red magnifying glass will appear next to the Curr input column, indicating that the data have been input in this manner. However, the column itself will remain blank, as it is impossible to display all the records that have been input.

Note that you can also use the target form to find and input a single value into the program when you are not sure of the value, as demonstrated in the example below.

Example:

Suppose you want to print an Order Confirmation for a customer but you are not sure of the order number.

1) In the Order Confirmation report, click the icon next to the Order column. The Sales Order form opens in Query mode.
2) Record the Customer No. and press Enter. All sales orders for this customer will be retrieved.
3) Scroll down (e.g., use the vertical scrollbar) until you find the line with the order you are looking for.
4) Without leaving the line, click Choose Value (or press F8). In the Back to Input window that opens, click OK. You will then return to the parameter input screen and the order in question will be inserted in the Order column with the symbol next to it