



Portal Generator and Applications

A User Guide



Version 2.0

Table of Contents



1. Introduction	3
2. Application Form Settings	4
Form Title 2.1	4
Column Settings for Display .2.2	5
Filtering Data on the Form 2.3	6
Additional Form Work Configurations .2.4	8
Zooming and Switching Between Forms .2.5	9
Television Display Form .2.6	10
Sublevel Forms .2.7	11
ONE PAGER .2.8	12
Wizard Mode .2.9	13
Direct Activations .2.10	14
Managing Questionnaires .2.11	14
3. Additional Entities	15
Automatic Filtering .3.1	17
4. User and Privileges Management	18
user types .4.1	18
System Privileges 4.2	19
5. Additional Issues	20
Two-factor authentication .5.1	20
Push Notifications 5.2	21
Opening Form Data Management .5.3	22
Additional System Operation Forms .5.4	23
Landing Pages .5.5	23
Sending Emails Through the System .5.6	25
Printing Labels from Portable Terminal .5.7	26

1. Introduction

The company Softsolutions Inc. has developed a simple and user-friendly tool for the Priority system which allows creating applications and websites based on the Priority system, including forms and matching entities, in a secure way and by means of simple settings which allow any user to build applications or a website without need in further development...

All pages of the application and the website are entirely based on the Priority forms which already exist in the system. This includes all of the fields in a form, business rules or any match and logic which exists in the Priority system.

This document will provide the main parameters for form settings, reports or existing procedure in order for them to appear in an appropriate and efficient way on your company website or your application.



Demo System
2
International demo

Reports

Service

Report an issue

Service Calls

Service Calls

Vendors

Inventory

Sales

Service Calls

Service Calls

Download

Refresh

Filter

+ New

Number Of Rows: 66 And More

Doc No.	Date Opened	Customer	Call Status	Part Number
SC21000002	19/05/21 17:20	Chick-fil-A	Quote	
SC21000001	19/04/21 16:59	Brown Michael	Start Work	
SC20000039	22/12/20 16:26	Worton Aileen	Quote	
SC20000038	22/12/20 11:56	Worton Aileen	Quote	
SC20000037	22/12/20 11:53	Worton Aileen	Quote	
SC20000036	21/12/20 18:21	David & Sons LTD	Quote	
SC20000035	17/12/20 10:59	David & Sons LTD	Quote	
SC20000034	09/12/20 15:00	David & Sons LTD	Quote	
SC20000033	09/12/20 14:33	David & Sons LTD	Quote	
SC20000032	09/12/20 14:32	Bird of Prey	Quote	111-001

2. Application Form Settings

Portal and application generator allows displaying every form in Priority as the page of a website or an application for use by customers, suppliers and company employees.

The process of form setting in the portal includes the following essential stages:

- ✓ Choosing an existing form to display on the portal and the way it is displayed
- ✓ Choosing the columns from the original form which will be presented on the page
- ✓ Setting which sublevel forms will be displayed.
- ✓ Setting direct operations for the form

2.1 Form Title

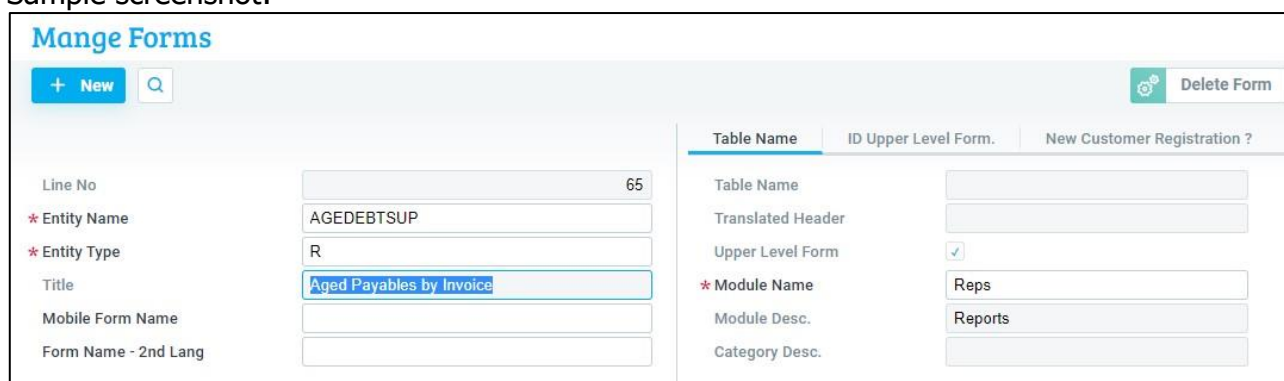
Settings for the forms themselves should be chosen in the forms and columns management form (system manager > portals – softsolutions > **forms and columns management**).

These are the essential steps for creating a new form in the generator:

- ✓ **Form name** – the form name as it appears in Priority (can also be chosen from the list)
- ✓ **Type** – choose F for form settings.
- ✓ **Title** – this field fill in of itself according to the form title.
- ✓ **Form name for the application** – the name of the form as it will appear in the application or the website. If empty, assumes the title that is in priority.
- ✓ **Main form** – a flag marked automatically in case this form is the main form.
- ✓ **Name of module** – here you need to locate the form in the menu where it appears. Read the [permissions chapter](#) about managing menus and permissions for the form and the different entities.
- ✓ **Category code** – designates menu of second hierarchy (optional – read permissions managing chapter)
- ✓ **Version n.** - after every change in one of the fields the version number grows.

After setting the form, the sublevel form “choosing form columns” will fill in automatically. Go to this form to choose which columns are displayed to the user.

Sample screenshot:



The screenshot shows the 'Mange Forms' interface. It has a header with a '+ New' button and a search icon. On the right, there is a 'Delete Form' button. The main area is divided into two columns. The left column contains fields for 'Line No' (65), '* Entity Name' (AGEDEBTSUP), '* Entity Type' (R), 'Title' (Aged Payables by Invoice), 'Mobile Form Name', and 'Form Name - 2nd Lang'. The right column contains fields for 'Table Name', 'Translated Header', 'Upper Level Form' (checked), '* Module Name' (Reps), 'Module Desc.' (Reports), and 'Category Desc.'.

2.2. Column Settings for Display

This form is used for defining which columns will be displayed to the user, controlling the order of the columns and more.

- **Table column** – identifies the field of the original form, for reading only.
- **Form column** – read only
- **Title** – read only

A form in the generator is built of 2 configurations.

One is **Preview**- displayed in the table view, at the first entrance to the screen.

The other is where the fields to be displayed to the user after viewing the record or opening a new record. These are for the most part the fields which were displayed in the preview plus additional fields if necessary – **extended display**.

Note - all fields appearing the preview will also serve as search fields in the from filter.

- ✓ **Instant Filtering Sorting** –whether the field will appear in the quick search (at the top of the screen) and the order in which it will appear.
- ✓ **Detailed View** – whether to display the field in the extended display
- ✓ **Preview** – whether to display the field in the preview
- ✓ **Preview order** – order of fields on the preview form and on the search form
- ✓ **Line number to display** – define in this field the order of displaying the field in application (vertical order), fields with the same line number, will be displayed in the same line.
- ✓ **Column number to display** – define in this field the order of displaying the field (horizontal order), fields with same column number, will be displayed in the same column.

Note, the same pair of fields exists separately for website and application

- ✓ **Title for application** – the title which will appear in the application.
- ✓ **Color of column** – allows defining color for column title, relevant only for application.
- ✓ **Type of field** – possible to choose one of the following options for the purpose of displaying specialized controllers in the application.
 - A – address: will allow opening the default navigation application on the device.
 - P – telephone: will allow opening the dialing panel on the device.
 - E – email: will allow opening the default email application on the device.
 - B – barcode: will allow opening the default camera application on the device.
 - L – location: will allow displaying this field on the map (still does not exist)
 - M – a plus/minus type of field: will allow using the plus and minus keys for the quantity field.
- ✓ **Sorting up/down** – determines the way lists on form are sorted
- ✓ **Read only on application** – allows marking a field as read only, even if not defined thus on original form
- ✓ **Scanning/choosing from a list** – field designates if possible to type in an entry or necessary to choose from a list.

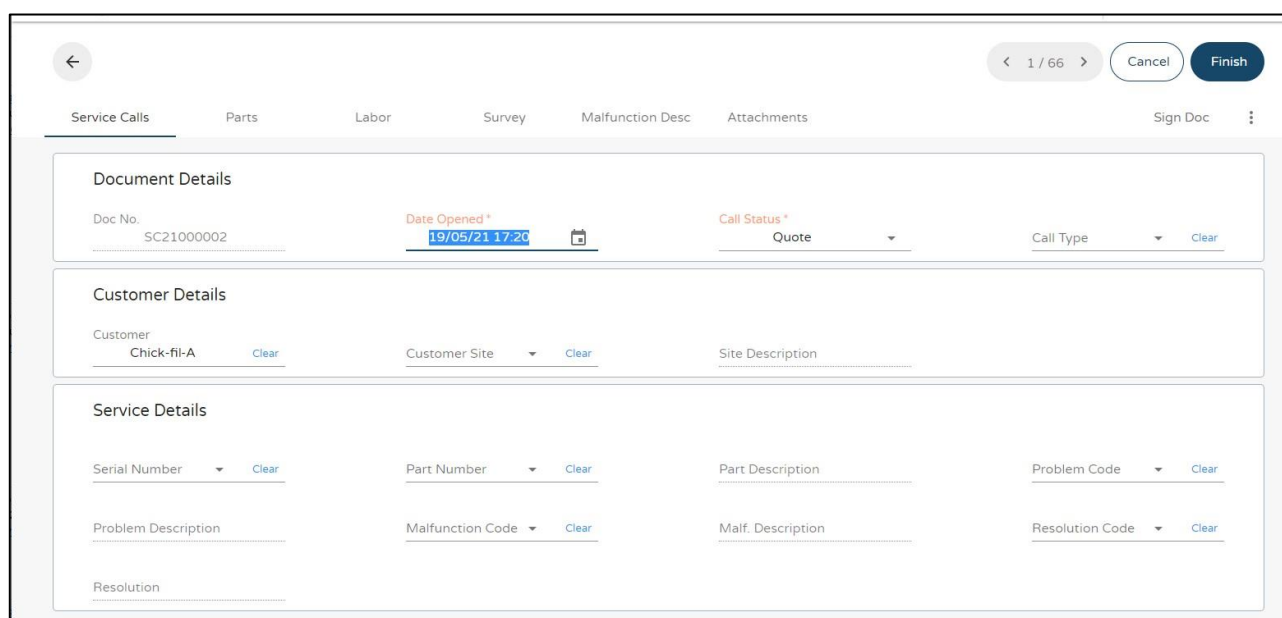
- ✓ **Canceling column condition** – marking this flag will grant user the option of canceling of filtering defined as condition for a column.

Grouping Fields by Category:

The generator allows grouping several columns into a given category. When there is a large number of fields this tool is useful and divides fields into groups by topic

- ✓ **Category** – unifies several registries on the form into tabs.
- ✓ **Description of category** – displays the read-only description of the category.

Example of using categories:



The screenshot shows a mobile application interface for a service call form. At the top, there are navigation tabs: Service Calls, Parts, Labor, Survey, Malfunction Desc, and Attachments. The 'Service Calls' tab is active. Below the tabs, there are three main sections: Document Details, Customer Details, and Service Details. Each section contains various input fields, some with dropdown menus and 'Clear' buttons. The Document Details section includes fields for Doc No. (SC21000002), Date Opened (19/05/21 17:20), Call Status (Quote), and Call Type. The Customer Details section includes fields for Customer (Chick-fil-A), Customer Site, and Site Description. The Service Details section includes fields for Serial Number, Part Number, Part Description, Problem Code, Problem Description, Malfunction Code, Malfunction Description, Resolution Code, and Resolution. At the top right of the form, there are navigation buttons: a back arrow, a page indicator (1 / 66), a Cancel button, and a Finish button.

2.3 Filtering Data on the Form

After form fields have been defined, there is an option for controlling the data and the registries that the form displays. This control is as a rule necessary for:

- preventing exposure of the data to a user who is not authorized (relevant when working with contacts)
- preventing unsupervised extraction of registries without any filtering

In the form columns choice sublevel form, there is a column called **column conditions**. This column will serve as a tool for filtering registries.

You can limit the display of registries in every column, whether we have chosen to display it to the user or not.

Examples -

- ✓ In the date-type column, an entry of **-30,60** will cause the filtering of registries 30 days back and 60 days forward.

This document is the property of Softsolutions Inc. It is forbidden to copy, duplicate, or transfer to any party or make any use of any of its parts unless an agreement has been provided beforehand and in writing by an authorized party at Softsolutions Inc.

- ✓ In user-based columns one can write **SQL.USER** in order to filter the registries of the current user only.
- ✓ Entering saved terms.
 - **CUSTNAME** in user columns will cause extraction of registries related to the client. At the moment of entering new registry, the client field through which the contact gained access will automatically fill in.
 - **CUSTNAME_R** in client columns indicates that the extraction will be done according to client, but at the moment of entering a new registry, the contact person will need to choose a client
 - **CUSTNAME_W** in client columns indicates that the extraction will be done without client limitations but during new registry the client through which the contact person gained access will be entered automatically
 - **SUPNMAE** for the provider columns (here too it is possible to add R or W at the end)
 - **CONTACT** used across from the name of the contact person in order to filter documents which belong to the contact person alone (here too it is possible to add R or W at the end)
 - additional options (here too the R and W endings can be used accordingly)
 - **SQL.USER** for identifying the current client
 - **BRANCHNAME** for identifying branch
 - **WORKER** for identifying employee
 - **EMAIL** for identifying by contact person's email field
- ✓ **Y** or **N** markings for Boolean fields
- ✓ **NULL** – in case necessary to filter to empty values only
- ✓ Numbers – can add the sign <, > for example: (valid through date) >15, and space between them in signs similar to date -30,60.
- ✓ Different from – add the ! mark before the value. Parallel to the <> sign in Priority. Example: !15. Adding in Hebrew should be done on the right side of the word, in English – on the left.
- ✓ Every other filtering which can be done by query in a regular Priority form (including example status name or any string)

Image of sample form:

Column Form	Header	Sho...	Inst...	Det...	Conditions For Rec...	Can...
SUPNAME	Vendor Number	<input type="checkbox"/>	0	<input type="checkbox"/>	SUPNAME	<input type="checkbox"/>
CREATEDDATE	Date Opened	<input type="checkbox"/>	0	<input type="checkbox"/>	-99,1	<input type="checkbox"/>
SUPNAMEPATNAM	Vendor No. Templat	<input type="checkbox"/>	0	<input type="checkbox"/>		<input type="checkbox"/>

It is possible to also allow the user to perform a cancellation of predefined filtering by marking the flag "cancel column conditions".

2.4. Additional Form Work Configurations

The portal generator allows for several configurations to work with a given form.

In the forms and columns management form there are several flags that enable the following:

- ✓ **Data extraction** – data will be extracted automatically, when entering the form, according to the cross-sections defined (e.g. last-month orders).
- ✓ **Entering to update** – data will not be shown of the form when users enter, and the form will open in an enter a new registries configuration.
- ✓ **Expert** – this flag means that when opening new registry, the user will have to fill in the information in the sublevel forms according to the determined order. [More on this subject](#)
- ✓ **Allowing direct entrance** – meant for building [landing pages](#). Entering this form will be made by skipping the stage of identification for the portal, i.e. without user name and password
- ✓ **Television display -**
this configuration serves background forms whose purpose is to display changing and dynamic information.
 - Data extraction will be done automatically upon entering the form-m
 - Side menus will not be displayed to the user.
 - The form will refresh, and display registries automatically and consecutively based on the different settings on the sublevel form "settings for television module."
 - Detailed example can be seen in the chapter detailing this configuration
- ✓ **Read only** – for a form which is not defined by the system as read only, can be thus defined for the portal and without having to change the original form itself.
- ✓ **Preventing deletion** – similarly, can define a form as one where deletions are not possible
- ✓ **Not allowing additions** – not possible to add new registries on this form
- ✓ **Auto save -**
 - when info is entered into the last field of the form, an automatic save will be made followed by switching to a new line
 - when using the application alone – using the BACK button will lead to automatic save
- ✓ **Translation according to user language** – when entering the form, warning notifications will be displayed, column titles according to the language chosen by the user on the main form. This requires using the dictionary module of the Priority system.

2.5. Zooming and Switching Between Forms

The system of forms in the portal allows connections between forms and registries. This is parallel to pressing F6 twice in the Priority system.

This allows, for example, to display a form with details of the delivery note, when the field catalog number will be displayed as a link to another form – in this case the product card. It is necessary to make sure that the target form (the product card in this case) is defined in the portal as well and allows to display the registry.

In this case it is necessary to define opposite the column PARTNAME the following fields:

- ✓ Target form (main form to be opened in the portal)
- ✓ Zoom column – the column where the value is to be transferred from the field and to extract the registry

Sample screenshot:

Column Form	DOCNO	Column Type	Search/Scan Only?	Width
Header	Call Number	Search/Scan Only?	<input type="checkbox"/>	
Show In Preview Mode.	<input checked="" type="checkbox"/>	Conditions For Records		
Instant Filter Sorting	0	Cancel Cond.	<input type="checkbox"/>	
Detailed View ?	<input checked="" type="checkbox"/>	Target Form		37
Title in Application	Call Number	Target Column	DOCNO	
		Column Name	DOCNO	

2.6. Television Display Form

The form generator allows building specialized forms meant for changing display for clients or company employees.

Possible uses for such a form are for example a form which displays open requests in the company service center or any other information which we may want to display to users on a rotating basis.

The principles for building a display form are:

- ✓ Make use of main form only (service requests, customer orders, etc)
- ✓ Mark the flag "television display" in the form generator
 - side menus will not be shown
 - editing registry on the form is not allowed
- ✓ in the sublevel form "settings for television module" define:
 - number of registries on page – the maximal number of registries to display for every page
 - browsing time – when there are many registries, above the number of registries on the page, the system will perform a continuous movement and browsing between the registries, this data defines the time each cluster of registries is displayed
- ✓ note that the combination of this display is especially efficient with registry coloring
 - define in the original form a string field which includes the color code in RGB format (i.e., 255,0,0 for red). This column should be maintained according to conditions.
 - Thus, for example to color red a service request above a day or a request waiting to be confirmed by customer.
 - In the forms and columns management form, this column should be chosen as the column which defines color
 - this way the entire line will be given the chosen color

Sample form image:

Service Calls					17-24 Results Of 66
Customer Name	Site Description	Date Opened	Call Number	Call Status	
Brown Michael		09/12/20 11:55	SC20000025	Active	
Bird of Prey	Second Site	09/12/20 11:54	SC20000024	Active	
Bird of Prey	First Site	09/12/20 11:42	SC20000023	Active	
Bird of Prey		08/12/20 16:17	SC20000022	Sign & End	
Brown Michael		08/12/20 15:46	SC20000021	Start Work	
David & Sons LTD		19/11/20 13:39	SC20000020	Active	
David & Sons LTD		19/11/20 13:05	SC20000019	Quote	
David & Sons LTD		17/11/20 11:03	SC20000018	Quote	

2.7. Sublevel Forms

The sublevel forms in the portal are forms in every respect. In order to define a sublevel form do the following:

- ✓ Define the form itself the same way as the main form, including the columns to be displayed.
- ✓ In the main form enter the sublevel form in the portal called "managing sublevel forms" – all sublevel forms will appear there automatically.
 - To display – mark the flag for each sublevel form we have chosen to display
 - Default sublevel form – it is possible to mark one of the sublevel forms which will show automatically when entering the registry
 - title for application – allows giving an alternate title for the sublevel form
 - order – determines the order of sublevel forms to be displayed, if empty will appear according to the order in the original form
 - displaying consecutively – meant for sublevel forms in the category **type-in text and appendices**. When this state is marked the sublevel form will appear not as the usual tab but under the main title (ONE PAGER)
 - editing text form – allows editing an existing text and not only adding new text to the dialog.
 - Managing questionnaires – serves to define task form to manage questionnaire. See chapter [Managing questionnaires](#) for details.
 - Skipping title form – similar to setting "default sublevel form", allows automatic navigation to a form marked as adding new registry. It is important to combine with this setting a condition for a column in the form, which will fill the rest of the entries and will allow to skip the title itself (main form), otherwise the setting will not work.
 - Displaying history first – to allow to display the history of the type-in text in the upper part of the form and the addition of the type-in text below.

Sample form image:

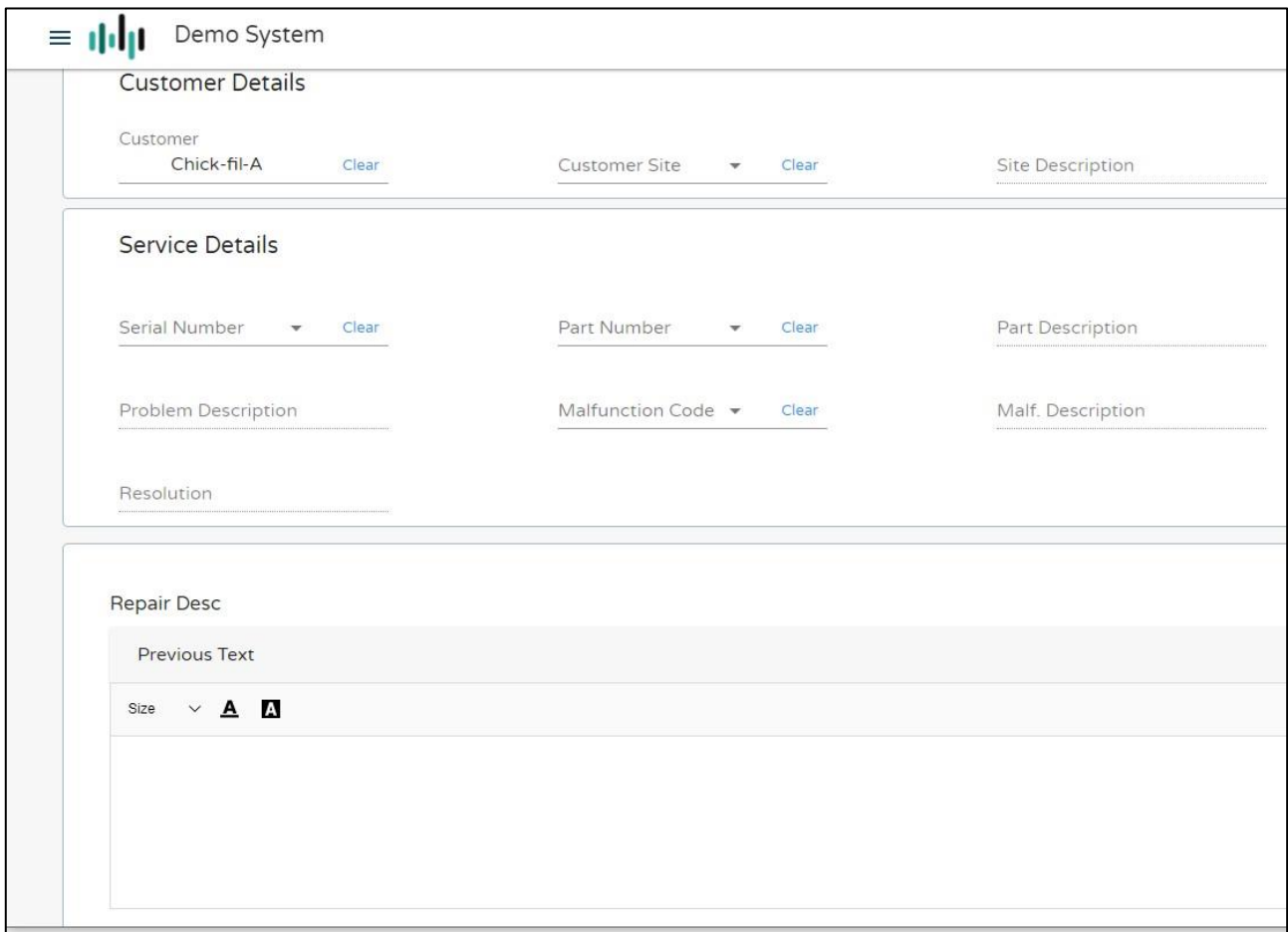
Line No	20	Table Name	ID Upper Level Form.
* Entity Name	DOCUMENTS_Q	Table Name	DOCUMENT
* Entity Type	F	Translated Header	
Title	Service Calls	Upper Level Form	<input checked="" type="checkbox"/>
Mobile Form Name	Open Ticket	* Module Name	Service
Form Name - 2nd Lang		Module Desc.	Service
		Category Desc.	

Manage Columns	Manage Second Level Entity	Direct Executions procedures	Scrolling Display Def.
Sort in Appli...	Form Name	Title Form Orig	Sho...
0	FUTUREGENDIARY	Calendar (All Users)	<input type="checkbox"/>
0	EXTFILES	Attachments	<input checked="" type="checkbox"/>
0	SHIPTO2	Shipping Address	<input type="checkbox"/>
0	PROJLINK	Projects/Accounts	<input type="checkbox"/>
0	FAQ2	FAQ	<input type="checkbox"/>
0	DOCTODOLIST	To Do Item	<input type="checkbox"/>

2.8. ONE PAGER

In case you have flagged in managing sublevel forms one of the types of forms "type-in text" or "appendices" as "display consecutively", the sublevel forms will be added to the title and a situation will arise which is called ONE PAGER. This situation is only valid with the addition of a new registry to the system.

Below is an example:



Demo System

Customer Details

Customer: Chick-fil-A [Clear](#)

Customer Site: [Clear](#)

Site Description: [Clear](#)

Service Details

Serial Number: [Clear](#)

Part Number: [Clear](#)

Part Description: [Clear](#)

Problem Description: [Clear](#)

Malfunction Code: [Clear](#)

Malf. Description: [Clear](#)

Resolution: [Clear](#)

Repair Desc

Previous Text

Size: [A](#) [A](#)

2.9. Wizard Mode

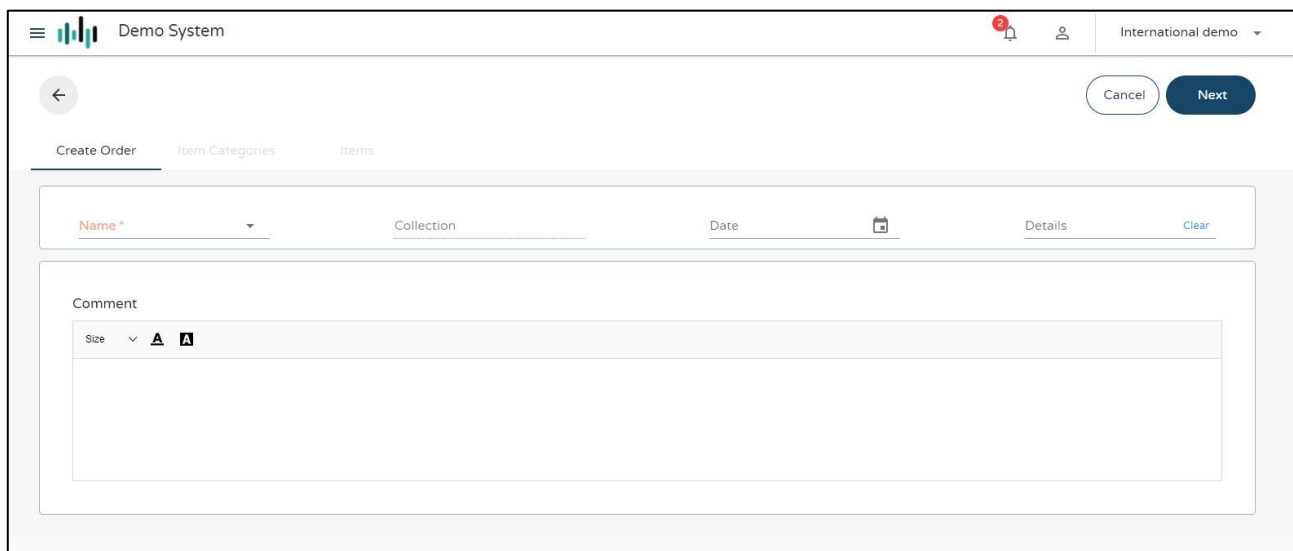
In case you marked the “wizard” flag in the form setting, and also defined sublevel forms for the form, the procedure for adding a new line to the form will change.

In this situation, the finish button will change into the “next” button and the user will not be able to skip between different sublevel forms and will instead move between them according to an order determined beforehand.

Once you reach the sublevel form which was determined to be the last, the text of the “next” button will change to “finish”, and after a click on it the user will be returned to the form from where they first came.

The combination of the wizard mode with the flag “allow direct access”, after pressing “finish”, the user will be taken to a predetermined picture file in the server preferences file.

Example screenshot:



2.10. Direct Activations

After configuring the form, enter its sublevel form "**direct operations**".

This form will automatically show all the direct operations now on form.

In order to display direct operation to a user it is necessary to mark the following:

- ✓ **Display** – mark every operation which needs to be added to the form
- ✓ **Quick activation** – this is the operation which will be shown to the user even in preview. You can only mark one of those per form.
- ✓ **Document to sign** – indicates that a process of signing should be allowed on the app only. The signed document will be saved as a PDF in the appendices for documentation.
- ✓ **Printing format and file type** – it is possible to choose fixed format for printing as well as the type of file (PDF or HTML)
- ✓ **Permanent display** – will allow displaying the procedure to be run on all sublevel forms.
- ✓ **Finish activation** – allows running the procedure after pressing the "finish" button, after designating a different file for the procedure in the field "title for the app" the name of the procedure will replace the name of the button itself.
- ✓ **Automatic operation column-** the trigger for running the procedure will be the changing the value of the selected column.

2.11. Managing Questionnaires

Example of questionnaire:

This document is the property of Softsolutions Inc. It is forbidden to copy, duplicate, or transfer to any party or make any use of any of its parts unless an agreement has been provided beforehand and in writing by an authorized party at Softsolutions Inc.

The system allows defining a separate work configuration for managing questionnaires.

In order to define a process of user or client questionnaire it is necessary to maintain the following:

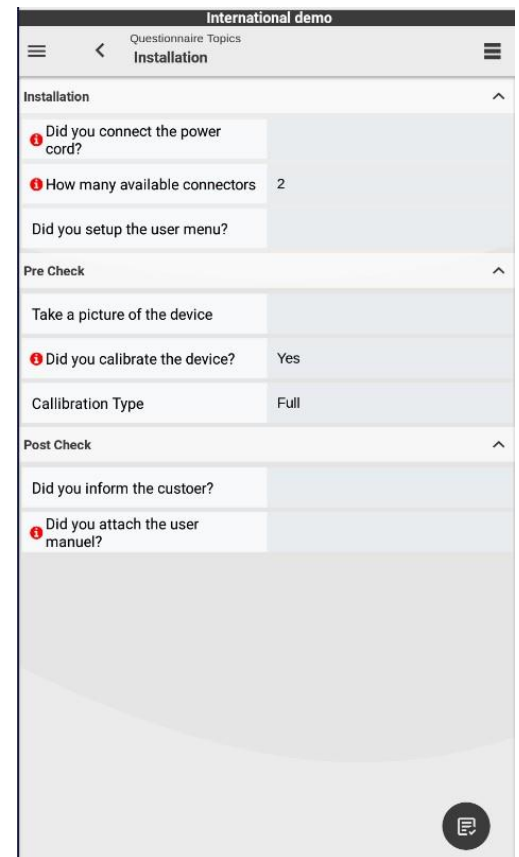
- ✓ There is a sublevel form for documenting task management (standard in many of the system forms). Flag this form in the sublevel form management form.
- ✓ This form must include the field for choosing questionnaire format (this too is standard in task forms for documentation)
- ✓ In every case a task is started which has a questionnaire code, a special button will be displayed for the user.
- ✓ In this specialized format the questions will be displayed consecutively when every response to an answer will automatically take him to the next question, till the questionnaire is finished.

Note – this working configuration is only related to the app

3. Additional Entities

The portal generator allows adding entities like report (R) and procedure (P).

- ✓ When these entities are added to a main menu, they should be defined as a separate registry, category R or P, in the forms and columns management form.
- ✓ When these are operated directly for a form which is already defined, simply use the sublevel form and mark them accordingly (sublevel form "direct operations")



Example:

Mange Forms

+ New

Line No	65
* Entity Name	AGEDEBTSUP
* Entity Type	R
Title	Aged Payables by Invoice
Mobile Form Name	
Form Name - 2nd Lang	

3.1. Automatic Filtering

The report and procedures mechanism allows limiting data when working with contact people for the customer and the provider. In every report or procedure, when there is an input parameter, it can be automatically limited to 3 modes

CUSTNAME – limit to customer of contact person

SUPNAME – limit to provider of contact person

CONTACT – limit to contact person

These saved words can be written down in the sublevel form **parameter documenting help to user**.

Sample screenshot:

Report Generator > Report Columns > **Help Text**

+ New

*Report Name	Title	Dist...	Spa...	Typ...	Maximum Table Wi...	Tabl... Inte...	*Appli...	*Module Name	Help Date
AGEDEBTSUP	Aged Payables by Invoice				0		FNC	Vendor Invoices	01/05/21 09:48

Account No. =
200009

Autofill that limits the report to a specific vendor

Pay Date =

Invoice Date =

Subsidiary Code =

Cancel Continue

Report Column Extension Report Columns-HTML Design **Help Text** Field

Text

Designate the account(s) of the vendor(s) for which to display overdue invoices.

SUPNAME

Fixed parameter for vendor number

4. User and Privileges Management

4.1. user types

The portal system supports two types of users:

- Priority user
- Client or provider contact

User Settings for Company Employee:

It should be noted that when the system is working with Priority users, the issue of privileges, including data privileges, will be managed similarly to its definition in the Priority privileges system.

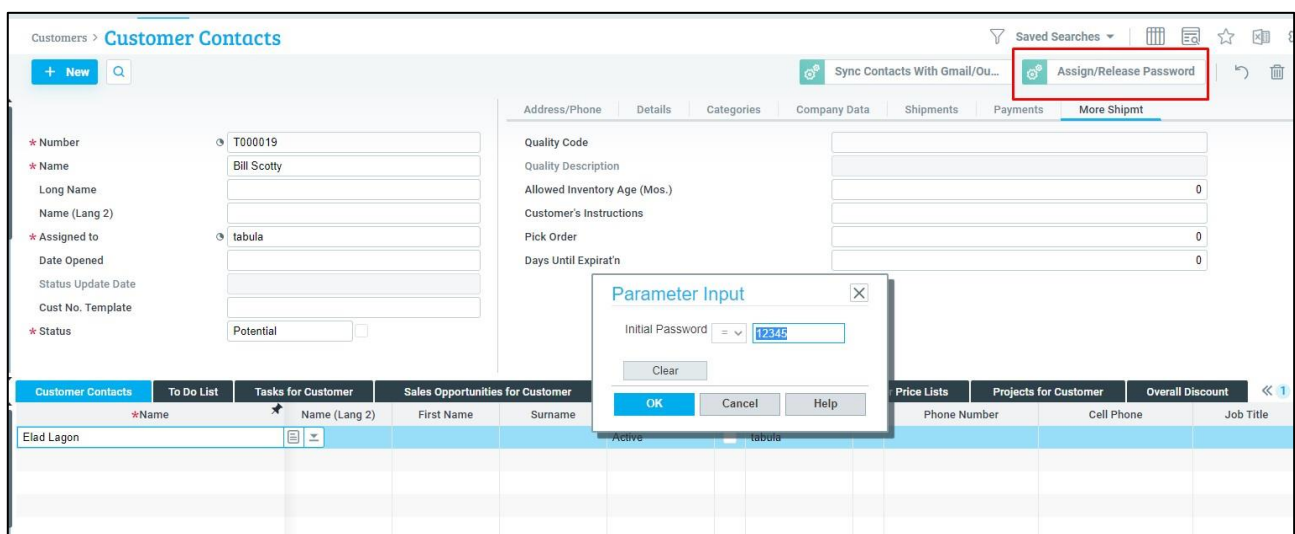
In addition, the following should be implemented as well:

- Privileges should be provided through the privileges explorer for the menu of the portal itself.
- The user should be flagged appropriately in the employee card (API field user)

User settings for client or provider contact requires the following:

- user name of the contact person is the email he has been assigned
- to assign a password, run the program "assign password for website" (direct run in the contact persons form for client or provider)
- assign to the Priority system a specialized user for the website. Under this user define the system privileges for the different entities.

Sample form:



The screenshot shows the 'Customer Contacts' form. The 'Assign/Release Password' button is highlighted with a red box. A 'Parameter Input' dialog box is open, showing 'Initial Password' set to '12345'. The form includes fields for Number, Name, Assigned to, Date Opened, Status Update Date, Cust No. Template, and Status. The 'Assign/Release Password' button is highlighted with a red box.

The portal's privileges system is based on parent menus. The system supports up to 3 levels of menus (side menu).

*Privileges also apply to the secondary menus of the primary module ((system manager – app generator – Softsolutions – menu managing – secondary menu managing)).

- ✓ certified users
- ✓ certified contacts

Sample form:

[illegible]

5. Additional Issues

5.1. Two-factor authentication

1. enter the form: System Management > Softsolutions Portal > E-commerce Security > Password Parameters. The mechanism can be applied to the two entities existing in the system. In turning on "MFA" flag the mechanism will apply to contacts only and in turning on "MFA for users" flag the mechanism will apply to Priority users only. Afterwards move down one line for the setting to be saved and exit the form.

2. enter the form: System Management > Softsolutions Portal > E-commerce Security > MFA Pincodes. It is necessary to define business law in the form for sending mail to the field "email", and to incorporate in the body of the message the field "single-use code". In the title you can write any message to the user in which you may wish to instruct him to read the code which has been sent to him.

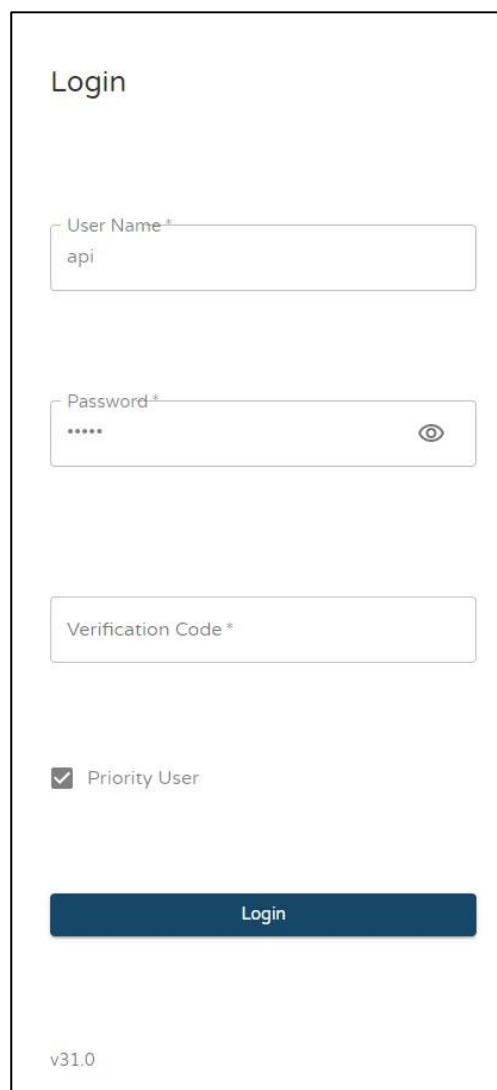
Important to define, if necessary, the validity of the law for all users and all companies.

Additional remarks:

1. in the case of a contact. It is necessary to make sure that an API user defined in the service definitions file is assigned an email without Outlook under Priority mail messaging definitions.

2. in case of a Priority user, make sure this user is assigned an email without Outlook under Priority main messaging definitions.

Example:



The screenshot shows a 'Login' form with the following fields and elements:

- User Name***: A text input field containing the value 'api'.
- Password***: A password input field with masked characters '*****' and a toggle icon (an eye) on the right.
- Verification Code***: An empty text input field.
- ☒ **Priority User**: A checked checkbox with the label 'Priority User'.
- Login**: A dark blue button with the text 'Login' in white.
- v31.0**: A version number at the bottom left of the form.

5.2 Push Notifications

The portal system allows managing messages by pushing across to the app (PUSH)
You can see the way this code is built in Priority in the following form:

in the client relations form – managing client relation – task status log
a new flag has been added called “phone notification flag”.
Every task which reaches this status and is marked will send a notification to the user.

Procedure for sending notification:

every entrance to the portal through the app generates the univalent number of the device which is called a token. We save the list of tokens for every user.
The list of tokens are in the following form: system manager – portals – softsolutions – token numbers for portal users.
This list is updated every time a user logs in again but with a different token.

The moment the status becomes the status marked with the flag “phone notification flag” the search for the addressee is begun.
If it is a contact person their email appears in the task and then you look if this mail has entered the system and has a token.
If it does, a notification is sent to the phone.
If it is a user in the field “requiring treatment” we look for the user in the token list. In case we find the user, a notification will be sent.

Notification Text:
task n. (task number) has been open for you
(subject of task)

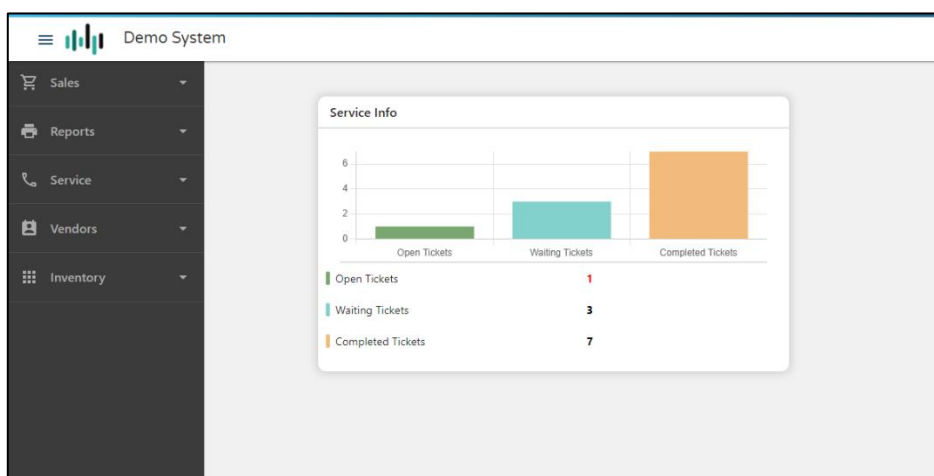
An example for the abovementioned code can be found in the CUSTNOTEA form, in the SOF-BUF1 trigger.

The aforementioned code can be copied and duplicated for any situation or form in which a user push notification is required.

5.3. Opening Form Data Management

The portal system allows displaying dashboards which aggregate information for the user in the start form, and even allow them to enter forms directly from the Dashboard. Therefore, you can easily generate a dashboard which displays information on documents, a or assembling tasks, acquisition details, marketing and more. The system displays an example of building a support code, as can be seen in the code segment at the PRE FORM trigger in the form SOF_DATABYMAIL

Sample form:



Each login to the system performed on the priority access to the sub-level form of the screen "manage users portal" that call: "info the home page".

This entry deletes the details from the screen and rebuilds the data for display. In this way you can write a sequence of queries that build the various components, with values.

In the list below you can see the main fields on this screen, and how to use them:

Component Type - Determines the type of graphic component that will appear on the main screen

- Blank = simple list
- B = Bars configuration
- P = pie configuration
- S = single button (in this case a different value must be kept in the "title" field even though it is not used on the screen)

Title - Determines the title of the component as shown in the example

Description - Sets the row header as shown in the example

Value - The value to be displayed. Note that this value is a text field.

- Color - Select from the color table. Uses to color a field approximately (for example in red in open tickets)

The records on the main screen can also be linked to screens and even to records in the system.

In any case of defining a line as a link to a screen or record, a LINK sign will appear in the mouse over the record.

To make such a link, the following fields will be used in the above screen:

- Screen ID - the number of the screen to which the link will be directed (from the screen and column management screen)
- Screen column and value for filtering - this option will retrieve a query on the destination screen which will retrieve the records according to a given field and a given value on the screen (for example a status field and the value "Draft").

Note that only one value can be passed in the "Filter value" field.

At the top of the opening screen, you can link 3 entities from the menu as quick runs. To do this, you can use the "Dashboard direct activation" field (a field on the screen " Manage Forms").

5.4. Additional System Operation Forms

The portal system contains additional maintenance forms.

In the portal menu – Softsolutions:

The **portal messages management** form

- ✓ Allows you to manage general messages to website users.
- ✓ Allows you to limit messages to specific time periods

The **portal banners management** form

- ✓ Allows you to connect images to be displayed in the portal's opening form.
- ✓ Connecting more than one image, leading to a changing image display.
- ✓ Allows you to limit the time period in which the images are displayed.

The **user entrance** form

- ✓ Allows you to review the various user's entrance log.

5.5. Landing Pages

Landing pages are forms allowing company clients to reach them without having to identify themselves with username and password. Such forms are relevant in cases of registering to a customer club etc.

To generate a landing page, establish an address (URL) with the following parameters (some of the optional):

FL – Form ID to operate (the form ID field in the forms and columns management form)

FK – ID of specific line which needs to be extracted in the above form

FV – A value to enter into a field

C – Company name (optional)

Examples:

Transferring FL only

when entering to update flag is **marked**, a new line will open:

<https://demo.softsolutions.com/priportal/?FL=21>

when entering to update flag is **not marked**, will reach the column itself

<https://demo.softsolutions.com/priportal/?FL=99>

Transferring FL together with FK and FV

when entering to update flag is marked, will reach to update line:

<https://demo.softsolutions.com/priportal/?FL=21&FK=CUSTNAME&FV=001>

when entering to update flag is not marked, we will reach the column containing the filtering of the parameter:

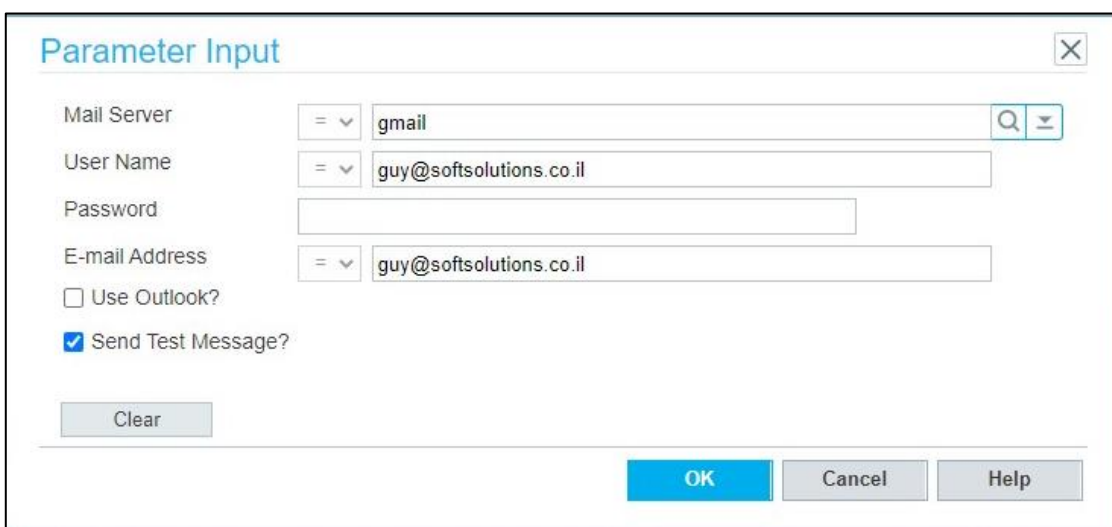
<https://demo.softsolutions.com/priportal/?FL=99&FK=CUSTNAME&FV=100079>

5.6. Sending Emails Through the System

Sending emails through the portal is done via the Priority system. Every business law defined in your system or a trigger at the end of which a mail is sent is sent through the mail server defined in Priority.

Definition of mail server should be done the following way:

1. login with the user into **Priority web** (canceling API field license if necessary)
2. In Priority, enter the following form: office managing – mail – defining mail delivery with other servers - defining mail delivery with other servers
3. perform the following definition:



The screenshot shows a 'Parameter Input' dialog box with the following fields and controls:

- Mail Server:** A dropdown menu with 'gmail' selected. To the right is a search icon and a dropdown arrow.
- User Name:** A dropdown menu with 'guy@softsolutions.co.il' selected.
- Password:** An empty text input field.
- E-mail Address:** A dropdown menu with 'guy@softsolutions.co.il' selected.
- Use Outlook?:** An unchecked checkbox.
- Send Test Message?:** A checked checkbox.
- Buttons:** 'Clear', 'OK', 'Cancel', and 'Help'.

Choose the mail server defined in your system.

And define in the fields for user name and email the email from which you want the mail to be sent and the password.

Make sure the flag "using Outlook" is not marked
(it is important not to mark it even if you are using Outlook in the company)

Mark the flag "send trial email" and check the inbox of the mail you have defined.
Afterwards it is possible to check the portal whether the action has been carried out successfully (that there is no error in relation to the email)

5.7. Printing Labels from Portable Terminal

All procedures with the portable terminal, all Priority processes are performed on the application server and not on the end device.

In order to print a label a change in the working configuration of the printing programs in the system is necessary.

The change can be made in the printing programs themselves or to copy them to separate programs.

The program for printing labels in Priority is made up of several stages -

1. A table defining the different types of labels, including a path to the definition file of the label (a btw file)
2. A code segment which fills the LABELS table
3. A request for inbuilt C program for printing labels (LABELS program)
note – it is not possible to choose a printer in Priority but only to indicate it in the label file itself

In order to make use of an existing program the stage where the printing program itself is started (stage 3) should be changed

This can be done in two stages:

- ✓ creating a text file on a fixed path which contains
 - the title which defines the file of the required label, printer, etc.
 - the sum of data from the LABELS table, as defined in the printing program.
- ✓ starting a component of the program BARTENDER which converts the above file to the printing action

Creating a Starting File

Below is a sample code to be incorporated in order to generate the text file to start the label:

when:

LABELPATH is the online path for the label's BTW file.

This path already exists in the labels definition table in Priority.

The path format should be [\\servername\folder\](#)

PRINTER is an optional parameter only

This way a specific printer can be given a path.

It is also possible to write into a file without this line and the label will be printed like in Priority by means of the definition in the BTW file

TOFILE is the path where the file will be created.

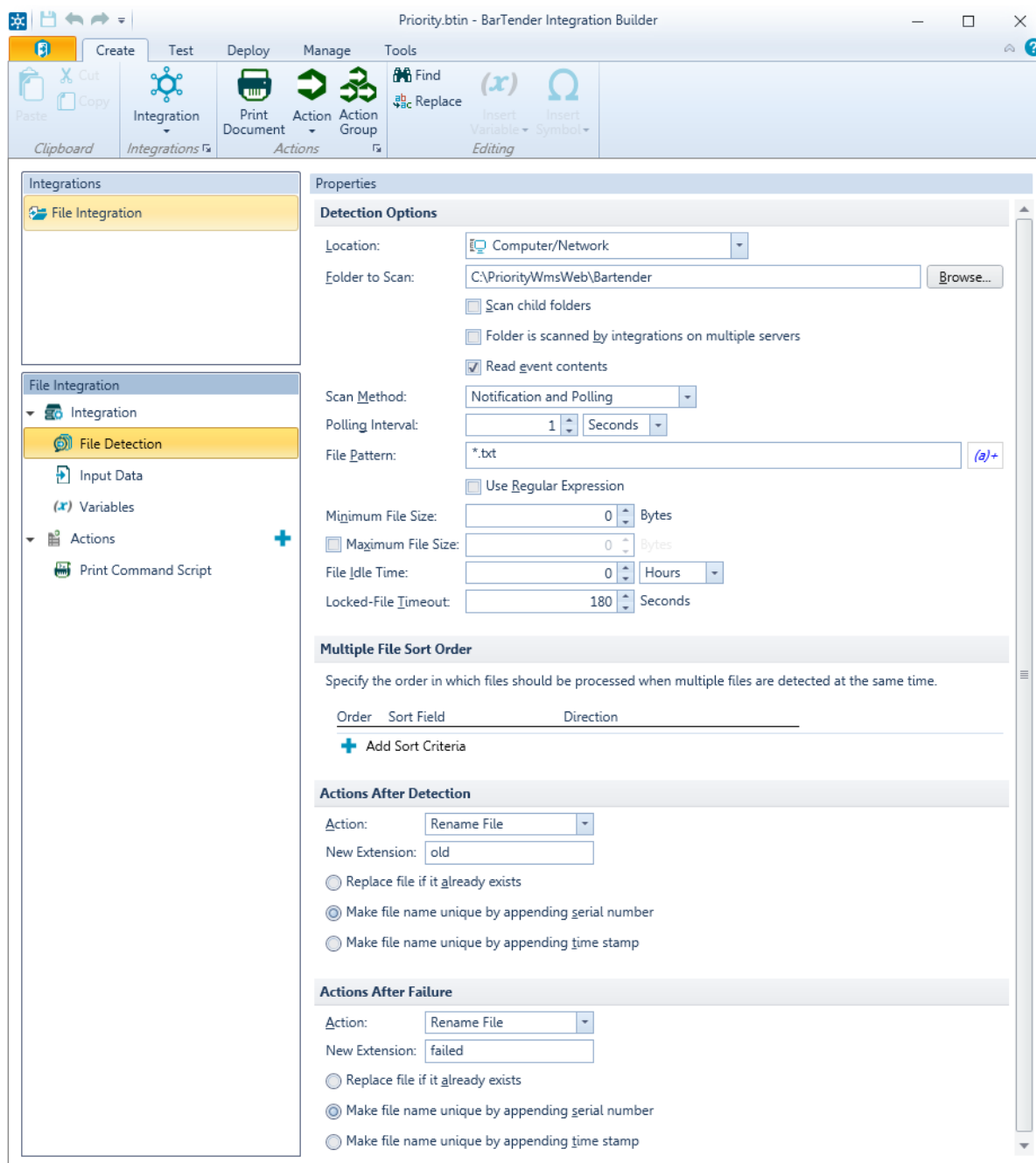
The folder where the files are written will be defined in the Bartender program as one which causes printing.

```
/* Header */
SELECT STRCAT('%BTW%',
'/AF=', :LABELPATH ,
'/D=%Trigger File Name%',
'/PRN=', :PRINTER ,
'/R=4 /P /DD'
)
FROM DUMMY TABS UNICODE :TOFILE ;
SELECT '%END%' FROM DUMMY TABS UNICODE ADDTO :TOFILE ;
/* Data */
SELECT
PAR1, PAR2, PAR3, PAR4, PAR5, PAR6, PAR7, PAR8,
PAR9, PAR10, PAR11, PAR12, PAR13, PAR14, PAR15,
PAR16, PAR17, PAR18, PAR19, PAR20, ITOA(LABELQUANT)
FROM LABELS
WHERE USER = SQL.USER
TABS UNICODE ADDTO :TOFILE ;
```

Bartender Integration Builder

In order to define the automation in the Bartender program, it is necessary to activate the Integration Builder component of the program. This component enables defining the folder where the printing files are generated and to activate the automatic printing.

The following is an example of the definitions form of the program -



The screenshot displays the 'Priority.btin - BarTender Integration Builder' window. The interface includes a menu bar (Create, Test, Deploy, Manage, Tools) and a toolbar with icons for various functions like Integration, Print Document, Action, and Action Group. The left sidebar shows a tree view with 'Integrations' expanded, containing 'File Integration' and 'File Detection' (selected). Below 'File Detection' are 'Input Data', 'Variables', and 'Actions' (containing 'Print Command Script'). The main area is titled 'Properties' and contains several sections:

- Detection Options:**
 - Location: Computer/Network (dropdown)
 - Folder to Scan: C:\PriorityWmsWeb\Bartender (text field with Browse... button)
 - ☐ Scan child folders
 - ☐ Folder is scanned by integrations on multiple servers
 - ☒ Read event contents
 - Scan Method: Notification and Polling (dropdown)
 - Polling Interval: 1 Seconds (spinners)
 - File Pattern: *.txt (text field with (a)+ button)
 - ☐ Use Regular Expression
 - Minimum File Size: 0 Bytes (spinners)
 - ☐ Maximum File Size: 0 Bytes (spinners)
 - File Idle Time: 0 Hours (spinners)
 - Locked-File Timeout: 180 Seconds (spinners)
- Multiple File Sort Order:**

Specify the order in which files should be processed when multiple files are detected at the same time.

Order	Sort Field	Direction
+ Add Sort Criteria		
- Actions After Detection:**
 - Action: Rename File (dropdown)
 - New Extension: old (text field)
 - ☐ Replace file if it already exists
 - ☒ Make file name unique by appending serial number
 - ☐ Make file name unique by appending time stamp
- Actions After Failure:**
 - Action: Rename File (dropdown)
 - New Extension: failed (text field)
 - ☐ Replace file if it already exists
 - ☒ Make file name unique by appending serial number
 - ☐ Make file name unique by appending time stamp