
Protean 7.3



FR5.1 Release Notes

Protean Field Service Management System 7.3.4615

March 2019



Notice

The content in this document represents the current view of Protean Software Ltd as of the date of publication. Because Protean responds continually to changing market conditions, this document should not be interpreted as a commitment on the part of Protean. Protean cannot guarantee the accuracy of any information presented after the date of publication.

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SECTION 1 - OVERVIEW

1.1 - Document Purpose

This document provides the feature information for the FR5.1 release of Protean 7.3 (7.3.4615) by Protean Software Ltd

1.2 - Background

This update incorporates an enhancement requested by customers. It forms part of the standard release schedule set down by Protean Software Ltd to keep Protean 7.3 current & offer increased functionality to the customer base as well as to attract new customers.

1.3 - Documentation

Further product documentation is available within the help system for Protean and from the Protean help website (support.proteansoftware.co.uk).

1.4 - Licensing

There are no licensing implications for Protean 7.3 resulting from this release.

1.5 - Supported Operating Systems & Platforms

1.5.1 Protean (Office)

Protean will operate on the following operating systems:

Windows 7, 8, 8.1 & 10

Windows Server 2008 and above

Terminal Services & Citrix supported

1.5.2 Protean (Mobile App)

Protean Mobile will work on any device running the Android operating system, v4.4 (KitKat, 2013) and above (currently latest version is v9 Pie, 2018). The device will also need a SIM card to support mobile internet & a appropriate data plan. Consideration should also be given to a rear-facing camera if engineers might be required to capture photographs on site.

SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.1 - Importing Parts Sales Orders

Protean has extended the Data Importer system to allow Parts Sales Orders to be imported from XML files only as defined below. (NB Due to the nature of Sales Orders , with a header and parts lines Protean can only import XML files for this data type, not CSV).

The Protean Scheduler can be configured to automatically import the Parts Sales Orders according to a schedule determined by the user.

If during an import, a problem is detected with the data in the import file then none of the file will be imported and a nominated Protean user will receive an internal Protean message informing them that a problem has occurred.

Once a file has been successfully imported it can be automatically deleted.

2.1.1 Import Schema

	Field	Type	Size	Required	
1	Customer Account Code	Text	17	Y	Must match an existing Customer account code in Protean
2	Delivery Account Code	Text	17	Y	Must match an existing Customer account code in Protean
3	Depot	Text	11	Y	Must exist in Protean
4	Order Ref	Text	255	N	
5	Order Date	Date		Y	
6	Due Date	Date		Y	
7	Sales Rep	Text	50	N	Must exist in Protean
8	Carriage	Currency		N	In Customer's currency
9	Place Order	Boolean		Y	True=Process order to placed status False=Leave order on entry status
10	Notes	Memo		N	Internal notes
11	UserRef1	Text	50	N	Must exist in Protean
12	UserRer2	Text	50	N	
13	Part No	Text	255	Y	Must match an existing Part Record in Protean
14	Stock State	Text	1	Y	N=New, R=Refurb, U=used
15	Quantity	Number (Integer)		Y	>0
16	Unit Price	Currency		N	In Customer's Currency. If not supplied, then Protean will use the current price appropriate for the Customer.
17	Discount	Number (Decimal)		N	>=0 & <=100. If not supplied, then Protean will use the discount appropriate for the Customer.
18	Item Notes	Text	50	N	Internal notes
19	Exchange Rate	Number (Decimal)		N	Rate used to convert Price and Carriage to Base Currency, will use Protean exchange rate if not supplied.

SECTION 2 - WHAT'S NEW IN THIS RELEASE

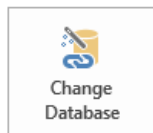
2.1.1 Import Schema (cont)

Validation Rules

- **Customer Account Code** must refer to an existing Customer Account within Protean which is on 'Active' status and which is an invoice account.
- **Delivery Account Code** must refer to an existing Customer Account within Protean which is on 'Active' status.
- **Depot** must refer to an existing Depot within Protean.
- **Sales Rep**, if supplied, must refer to an existing Employee within Protean who is Active and is flagged as a Sales Rep.
- **UserRef1**, if supplied, must refer to an existing Sales Order User Reference within Protean.
- **Part No** must refer to the Part No of an existing Stock Record within Protean.

2.1.2 Importing Parts Sales Orders

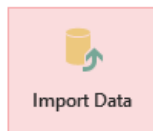
Users can import Parts Sales Order by selecting the File menu tab and then picking 'Data Importer' from the icon list.



Change Database

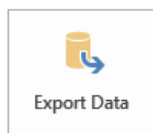
Change the database to which Protean is connected.

- The current database is 'Forktruck Ltd' on the SQL Server '.\protean'.



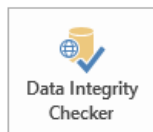
Data Importer

Import data from external sources into Protean.



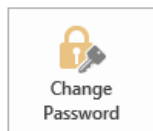
Data Exporter

Export data from Protean to external files.



Data Integrity Checker

Check the integrity of the data held in the database.



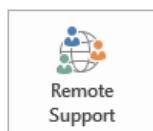
Change Password

Change the password that you use to log into Protean.



Support Website

Visit the Protean Support Help Website to access both how to and training videos as well as easily searchable knowledgebase articles.



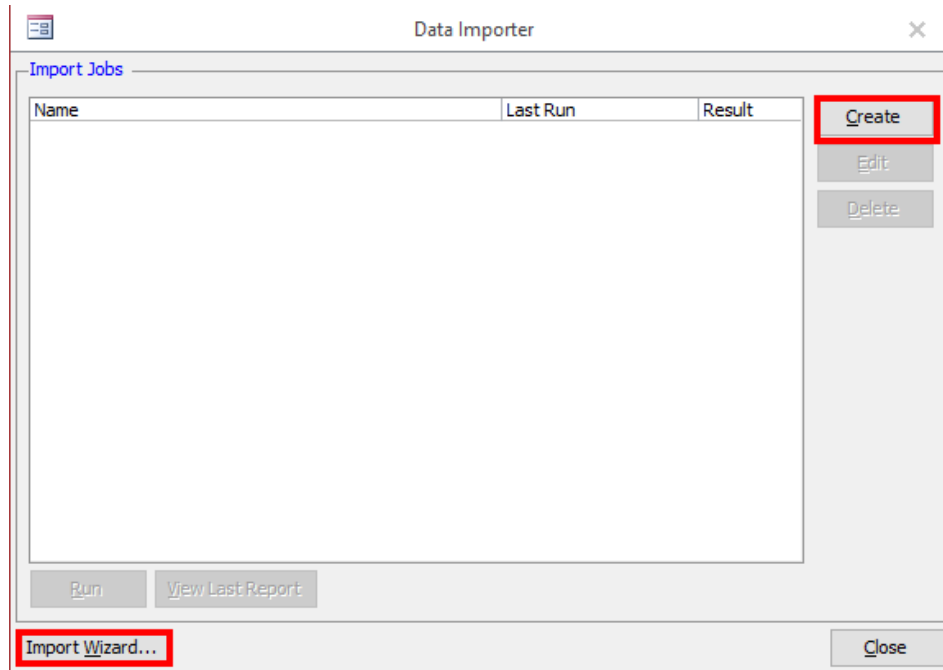
Remote Support

Allows you to receive remote support from Protean Support personnel.

SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.1.2 Importing Parts Sales Orders (cont.)

or by setting up the scheduler to run the import job (once created) as specified intervals. Once in Data Importer then users can either run the 'Import Wizard' to import Parts Sales Order files or 'Create' a new data job so it can be run again easily or scheduled to run automatically.



Running the 'Import Wizard' then allows the user to select 'Parts Sales Orders (XML Only)' from the list of data types.



SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.1.2 Importing Parts Sales Orders (cont.)

Then the user can select the file to be imported. Once selected the system will read the file and show the user the data to be imported (NB This will display header information only ie one line per Sales Order).

[illegible]

After selecting 'Next' the user is asked to confirm that they want to import this data. The system then attempts to import the data and checks the validation rules. Any failures are reported immediately:

Data Import Problems

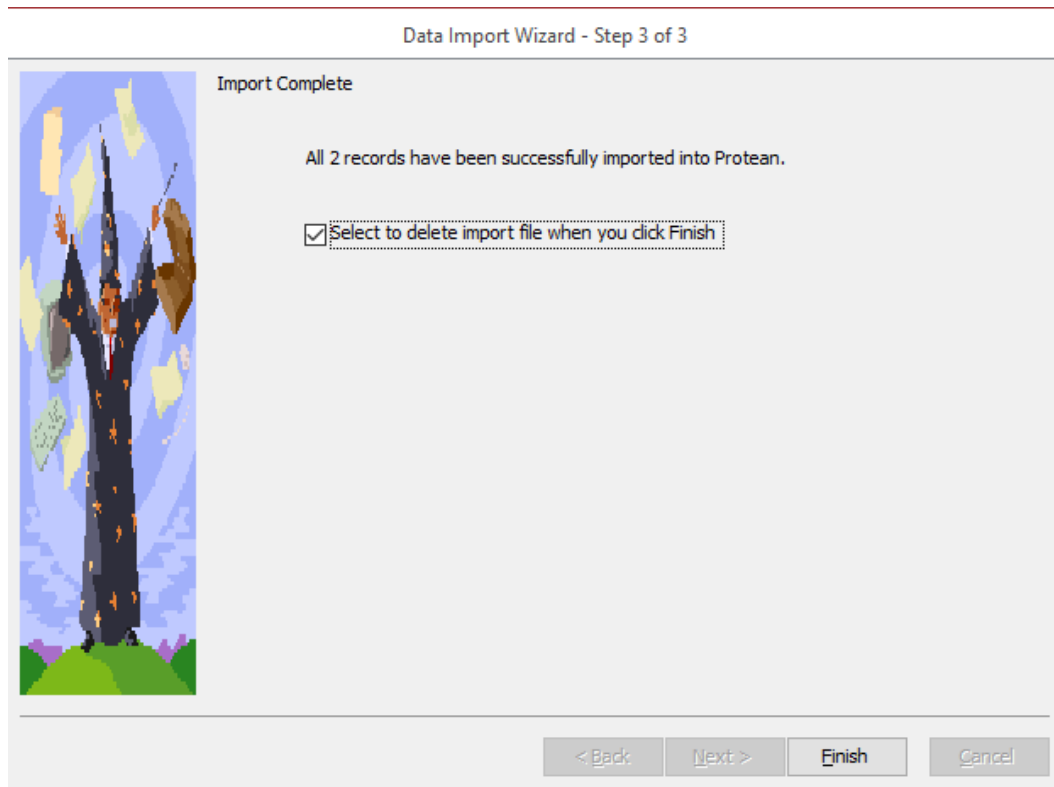
CustomerAccountCode: 'A0003' does not exist in Protean
 CustomerAccountCode: 'PIC001' does not exist in Protean
 DeliveryAccountCode: 'A0003' does not exist in Protean
 DeliveryAccountCode: 'PIC001' does not exist in Protean
 Depot: 'Protean' does not exist in Protean
 Sales Rep: 'Elaine Rollinson' does not exist in Protean or is not a Sales Rep
 UserRef1: 'Import' does not exist in Protean
 Part No: 'PRT07013' does not exist in Protean
 Part No: 'PRT093032' does not exist in Protean
 Part No: 'PRT10111' does not exist in Protean
 Part No: 'PRT13363' does not exist in Protean
 Part No: 'PRT147053' does not exist in Protean

Close

SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.1.2 Importing Parts Sales Orders (cont.)

If validation passes then a success message is displayed and the user is given the option of deleting the XML file to prevent duplications.



The Parts Sales Orders have been imported and can now be processed as normal.

Global Enquiry - Sales Orders - 11 records

Order No	Customer	Delivery	Due Date	Order Date	Customer Ref	Taken By	Status
26	ABC Machines Tools	ABC Machines Tools	19/01/2019	19/01/2019	C000001	NHP	Placed
25	Petresen Dealership Ltd	Petresen Dealership Ltd	19/01/2019	19/01/2019	8000002	NHP	Entry
22	Lift Truck Sales Ltd	Lift Truck Sales Ltd	25/07/2018	25/07/2018	25452	ADM	Quoted
18	AMLAC Forklifts	AMLAC Forklifts	25/07/2018	25/07/2018	98798	ADM	Placed
17	Lift Truck Sales Ltd	Lift Truck Sales Ltd	25/07/2018	25/07/2018	9879552	ADM	Placed
16	Lift Truck Sales Ltd	Lift Truck Sales Ltd	25/07/2018	25/07/2018	328888	ADM	Placed
12	Big Red Storage LTD	Big Red Storage LTD	06/01/2017	06/01/2017		ADM	Invoicing Req
11	Mistry Carpets LTD	Mistry Carpets LTD	06/01/2017	06/01/2017		ADM	Entry
10	BNF Steel	BNF Steel	06/01/2017	06/01/2017	3213	ADM	Placed
5	Rymer Scaffolding	Rymer Scaffolding	05/01/2017	05/01/2017	65558	ADM	Invoicing Req
2	A+ Equipment	A+ Equipment	23/12/2016	23/12/2016		ADM	Placed

Here we can see the two Sales Orders imported from XML files. One is at Status 'Placed' and the other at 'Entry'. Either can be Populated when the XML file is generated depending on user company choice.

SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.1.2 Importing Parts Sales Orders (cont.)

Sales Order - 26

Invoice To	Deliver To	Memo	Sales Order	
A0003 ABC Machines Tools 101-110 Lockhurst Lane Covventry West Midlands CV6 5SF	A0003 ABC Machines Tools 101-110 Lockhurst Lane Covventry West Midlands CV6 5SF	Notes	Order No: 26 Customer Ref: C000001 Order Date: 19/01/2019 Due Date: 19/01/2019 Carriage: £10.00	Type: Parts Taken By: Neil Plumbley Sales Rep: Elaine Rollinson Depot: Protean Status: Placed

Parts Other Details

Part No	Description	SX	Demand	Picked	O/S	Price	Disc	Cost	Value
PRT07013	N Air Filter	☐	2	0	2	£5.00	0.00%	£0.00	£10.00
PRT147053	R Seat Cover (Leather Effect)	☐	1	0	1	£5.00	1.00%	£0.00	£4.95
PRT13363	N Warning Beacon (Red)	☐	3	0	3	£0.00	0.00%	£0.00	£0.00

PRT07013 6 0 6 £0.00 £14.95

Notes: Item Notes Profit Margin: 100.00%

Cancel Print Quote Place Print Acknowledgement Despatch View Despatches Invoice Zero OS Complete Close

The Parts Sales Order can now be processed as normal.

SECTION 3 - APPENDIX

Parts Sales Order XML Schema Definition

```
<?xml version="1.0" encoding="UTF-8"?>
<xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema" elementFormDefault="qualified" attributeFormDefault="unqualified">
  <xs:element name="ImportPartsSalesOrders">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="Exceptions" minOccurs="0">
          <xs:complexType>
            <xs:sequence>
              <xs:element name="Exception" minOccurs="0" maxOccurs="unbounded" nillable="true">
                <xs:simpleType>
                  <xs:restriction base="xs:token">
                    <xs:minLength value="1"/>
                  </xs:restriction>
                </xs:simpleType>
              </xs:element>
            </xs:sequence>
          </xs:complexType>
        </xs:element>
      </xs:sequence>
    </xs:complexType>
  </xs:element>
  <xs:element name="DataItems" minOccurs="0">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="SalesOrder" minOccurs="0" maxOccurs="unbounded">
          <xs:complexType>
            <xs:sequence>
              <xs:element name="CustomerAccountCode">
                <xs:annotation>
                  <xs:documentation>This is the Customer Account Code which the order will be billed to</xs:documentation>
                </xs:annotation>
                <xs:simpleType>
                  <xs:restriction base="xs:token">
                    <xs:maxLength value="17"/>
                  </xs:restriction>
                </xs:simpleType>
              </xs:element>
              <xs:element name="DeliveryAccountCode">
                <xs:annotation>
```

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```
<xs:documentation>This is the Delivery Account Code to which the order will be delivered</xs:documentation>
</xs:annotation>
<xs:simpleType>
  <xs:restriction base="xs:token">
    <xs:maxLength value="17"/>
  </xs:restriction>
</xs:simpleType>
</xs:element>
<xs:element name="Depot">
  <xs:annotation>
    <xs:documentation>This is the Depot to which the order will be assigned</xs:documentation>
  </xs:annotation>
  <xs:simpleType>
    <xs:restriction base="xs:token">
      <xs:maxLength value="50"/>
    </xs:restriction>
  </xs:simpleType>
</xs:element>
<xs:element name="OrderRef" minOccurs="0" nillable="true">
  <xs:annotation>
    <xs:documentation>This is the order number from the external system</xs:documentation>
  </xs:annotation>
  <xs:simpleType>
    <xs:restriction base="xs:token">
      <xs:maxLength value="50"/>
    </xs:restriction>
  </xs:simpleType>
</xs:element>
<xs:element name="OrderDate" type="xs:date">
  <xs:annotation>
    <xs:documentation>This is the order date</xs:documentation>
  </xs:annotation>
</xs:element>
<xs:element name="DueDate" type="xs:date">
  <xs:annotation>
    <xs:documentation>This is the date that the order is required to be delivered by</xs:documentation>
  </xs:annotation>
```

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</xs:element>

<xs:element name="SalesRep" minOccurs="0" nillable="true">

<xs:annotation>

<xs:documentation>This is the sales person responsible for the sale</xs:documentation>

</xs:annotation>

<xs:simpleType>

<xs:restriction base="xs:token">

<xs:maxLength value="50"/>

</xs:restriction>

</xs:simpleType>

</xs:element>

<xs:element name="Carriage" minOccurs="0">

<xs:annotation>

<xs:documentation>This is the carriage charge for the order</xs:documentation>

</xs:annotation>

<xs:simpleType>

<xs:restriction base="xs:decimal">

<xs:fractionDigits value="2"/>

</xs:restriction>

</xs:simpleType>

</xs:element>

<xs:element name="PlaceOrder" type="xs:boolean">

<xs:annotation>

<xs:documentation>This determines whether the order will be automatically placed or need to be manually placed</xs:documentation>

</xs:annotation>

</xs:element>

<xs:element name="Notes" type="xs:string" minOccurs="0" nillable="true">

<xs:annotation>

<xs:documentation>These are any notes relating to the order</xs:documentation>

</xs:annotation>

</xs:element>

<xs:element name="UserRef1" minOccurs="0" nillable="true">

<xs:annotation>

<xs:documentation>This is a User defined value</xs:documentation>

</xs:annotation>

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```
<xs:simpleType>
  <xs:restriction base="xs:token">
    <xs:maxLength value="50"/>
  </xs:restriction>
</xs:simpleType>
</xs:element>
<xs:element name="UserRef2" minOccurs="0" nillable="true">
  <xs:annotation>
    <xs:documentation>This is a User defined value</xs:documentation>
  </xs:annotation>
  <xs:simpleType>
    <xs:restriction base="xs:token">
      <xs:maxLength value="50"/>
    </xs:restriction>
  </xs:simpleType>
</xs:element>
<xs:element name="ExchangeRate" minOccurs="0">
  <xs:annotation>
    <xs:documentation>This is the exchange rate used to convert price for the order if the customer account is not a base
    currency account</xs:documentation>
  </xs:annotation>
  <xs:simpleType>
    <xs:restriction base="xs:decimal">
      <xs:fractionDigits value="2"/>
    </xs:restriction>
  </xs:simpleType>
</xs:element>
<xs:element name="OrderItems">
  <xs:complexType>
    <xs:sequence>
      <xs:element name="OrderItem" maxOccurs="unbounded">
        <xs:complexType>
          <xs:sequence>
```

SECTION 3 - APPENDIX

```
<xs:element name="PartNo">
  <xs:annotation>
    <xs:documentation>This is the Part Number.</xs:documentation>
  </xs:annotation>
  <xs:simpleType>
    <xs:restriction base="xs:token">
      <xs:maxLength value="255"/>
    </xs:restriction>
  </xs:simpleType>
</xs:element>

<xs:element name="StockState">
  <xs:annotation>
    <xs:documentation>This is Stock State of the Part 'N' for New, 'U' for Used, or 'R' for Refurb"</xs:documentation>
  </xs:annotation>
  <xs:simpleType>
    <xs:restriction base="xs:token">
      <xs:maxLength value="1"/>
      <xs:enumeration value="N"/>
      <xs:enumeration value="U"/>
      <xs:enumeration value="R"/>
    </xs:restriction>
  </xs:simpleType>
</xs:element>

<xs:element name="Quantity">
  <xs:annotation>
    <xs:documentation>This is the Quantity to order.</xs:documentation>
  </xs:annotation>
  <xs:simpleType>
    <xs:restriction base="xs:integer">
      <xs:minInclusive value="0"/>
    </xs:restriction>
  </xs:simpleType>
</xs:element>

<xs:element name="UnitPrice" minOccurs="0">
  <xs:annotation>
    <xs:documentation>This is the Unit Price.</xs:documentation>
  </xs:annotation>
  <xs:simpleType>
```

SECTION 3 - APPENDIX

```
<xs:restriction base="xs:decimal">
  <xs:fractionDigits value="2"/>
</xs:restriction>
</xs:simpleType>
</xs:element>
<xs:element name="Discount" minOccurs="0">
  <xs:annotation>
    <xs:documentation>This is the discount percentage</xs:documentation>
  </xs:annotation>
  <xs:simpleType>
    <xs:restriction base="xs:decimal">
      <xs:fractionDigits value="2"/>
    </xs:restriction>
  </xs:simpleType>
</xs:element>
<xs:element name="ItemNotes" type="xs:string" minOccurs="0" nillable="true">
  <xs:annotation>
    <xs:documentation>This is notes specific to the item on the order.</xs:documentation>
  </xs:annotation>
</xs:element>
</xs:sequence>
</xs:complexType>
</xs:element>
</xs:sequence>
</xs:complexType>
</xs:element>
</xs:sequence>
</xs:complexType>
</xs:element>
</xs:sequence>
</xs:complexType>
</xs:element>
</xs:sequence>
</xs:complexType>
</xs:element>
```