

Protean 7.3



FR6 Release Notes

Protean Field Service Management System 7.3.4736

July 2019

The screenshot displays the Protean Field Service Management System interface. At the top, there is a navigation bar with 'Home', 'Enquiries', 'Reports', 'Requests', and 'Log Off'. The main content area is titled 'Job Request' and contains a form for entering details. The form includes fields for 'Name' (Mike Freeman), 'Telephone' (telephone), 'Email' (mike.freeman@proteansoftware.co.uk), and 'Company' (ABEX LIMITED). Below the form is a 'Submit Job Request' button.

Overlaid on the main interface is a mobile phone displaying 'Job 17442 - Details'. The phone screen shows a list of equipment items with their status and details:

Equipment	Status	Our No.	S No.
Mitsubishi/RF750 Compressor/Industrial Piston/Standard	Done	0989	23534369
Vallant/E50 Air Treatment/Refrigerant Dryer/Standard	Done	2099	55465566
Mitsubishi/RF750 Compressor/Industrial Piston/Standard	Not Done	4	5457
Mitsubishi/RF750 Compressor/Industrial Piston/Standard	Not Done	5	5458
Mitsubishi/RF750 Compressor/Industrial Piston/Standard	Not Done	8356	665465
Mitsubishi/RF750 Compressor/Industrial Piston/Standard	Not Done	0/5	0/5

Below the phone is a desktop window titled 'Equipment' showing details for a specific piece of equipment. The window is divided into several sections:

- General:** No.: 0050, Make: Potte, Model: P200, Serial No: 8766, Status: Cust, Second Hand: , Asset: , Hire Rate: £/hr.
- Contact:** Name: Leroy Spock, Tel: 0191 121 9876.
- References:** Customer's Equipment No: COP 112233, Category 1, Category 2, System Ref, Reference 4.
- Location:** Depot: Rugby, Site: COM001, Compton Packaging, Grange Rd, Bede Industrial Estate, Jarrow, Tyne & Wear, NE32 3AA.
- Workshop:** In Workshop: , Condition: Out of Action.
- Meter:** Reading: 3000, Date Read: 10/12/2002.

At the bottom of the desktop window, there are buttons for 'Parts Fitted', 'Availability', 'Add Make & Model', 'Modify Equip No', 'Links', 'Create Copy', and 'Close'.

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 FR6 release of Protean 7.3 (7.3.4723) 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 v8). 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 - Equipment Out of Action

We are aware that some of our user base have large customers that require different response times & attitudes when call out jobs are requested on equipment when the item is not able to be used ie it is 'down' or 'out of action'. To achieve this Consumers need to be able to flag an item of equipment on a job to reflect this condition and system users need to know that this has happened.

To achieve this we have enhanced the existing Equipment Condition indicators—the small red, yellow & green squares on the Equipment record. Initially this was really just used in relation to Hire equipment to indicate its readiness to be hired out but now this has been extended with the addition of a label alongside the coloured indicator:

Condition:  Operational

Condition:  Needs Work

Condition:  Out of Action

The Condition of the Equipment can be flagged as 'Out of Action' on the Web Portal by the Customers, changed in the main office system by users and updated by engineers via the mobile app.

Information about Equipment Condition changes is recorded in a new table so that it can reported on via standard reports, Protean Intelligence charts or Business Alerts.

2.1.1 Web Portal

Changes have been made to enable the flagging of equipment as 'Out of Action' via the web portal as well as end customers being able to see the current condition of any equipment and how related jobs are progressing.

2.1.1.1 Logging a Job

When Web Portal users request a new job using 'Requests' from the main menu & then selecting 'Jobs Request' they can now flag the selected Equipment as 'Out of Action'. The 'Out of Action' checkbox is available on a per Equipment record basis, rather than at Job level to provide improved visibility & accuracy.



Equipment	
Our Ref/Your Ref	88971/ <input checked="" type="checkbox"/> Out of Action Remove
Make/Model	CESAB/ECO KD 155
Serial No	
Work Required	<input type="text"/>
Our Ref/Your Ref	R118 URA/ <input type="checkbox"/> Out of Action Remove
Make/Model	VOLKSWAGEN/1200D SWB
Serial No	
Work Required	<input type="text"/>

[Add Equipment](#)

[Submit Job Request](#)

Note: Fields marked with a * are required.

SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.1 - Equipment Out of Action (cont)

2.1.1 Web Portal (cont)

2.1.1.1 Logging a Job (cont)

On submitting the Job the Condition Indicator on the selected Equipment will be updated to 'Red' or 'Out of Action'.

2.1.1.2 The Jobs List

When using the Jobs List on the Web Portal users will note that there is a new column labelled OOA (Out of Action). This column shows the quantity of equipment on a given job that has been flagged as OOA.

Jobs

Logged between and Equip No
 Site <All> Order No Type <All>

Job No	Type	Order No	Site	Equip No	Status	Logged	Completed	OOA
26737	Other	456654	Protean Software Ltd		Logged	06/06/2019 10:15		
26736	Outside Service	555555	Protean Software Ltd	(1 item)	Logged	06/06/2019 10:03		(1 item)
26735	Outside Service	99999	Protean Software Ltd	(1 item)	Logged	23/05/2019 15:07		(1 item)
26734	Outside Service	87879	Protean Software Ltd	(1 item)	Logged	23/05/2019 15:07		(1 item)
26733	Outside Service	1234	Protean Software Ltd	(1 item)	Logged	23/05/2019 15:07		(1 item)
26732	Outside Service	99999	Protean Software Ltd	(1 item)	Logged	23/05/2019 15:07		(1 item)
26731	Outside Service	99999	Protean Software Ltd	(3 items)	Logged	23/05/2019 12:40		(3 items)
26730	Workshop	123456	Protean Software Ltd	(1 item)	Logged	23/05/2019 09:12		(1 item)
26729	Outside Service	12345	Protean Software Ltd	(2 items)	Logged	22/05/2019 09:57		(2 items)
26728	Outside Service		Protean Software Ltd	(2 items)	Logged	15/05/2019 13:22		(2 items)
26726	Outside Service	123	Protean Software Ltd	(1 item)	Logged	11/04/2019 07:50		(1 item)
26714	Other	666555	Protean Software Ltd		Logged	20/12/2018 15:15		
26713	Other	123456	Protean Software Ltd		Logged	20/12/2018 14:44		
26712	Outside Service		Protean Software Ltd	(1 item)	Logged	20/12/2018 14:10		(1 item)
26693	Sales		Protean Software Ltd	(1 item)	Logged	20/10/2017 16:26		
26686	Outside Service		Protean Software Ltd		Scheduled	30/12/2015 09:24		
26593	Outside Service		Protean Software Ltd	1	Logged	20/07/2015 11:12		(1 item)
26488	Workshop		Protean Software Ltd	(1 item)	Completed	13/03/2015 13:09	13/03/2015 12:00	
26487	Outside Service		Protean Software Ltd		Logged	13/03/2015 13:03		
26486	Outside Service		Protean Software Ltd		Logged	13/03/2015 12:59		
26485	Outside Service		Protean Software Ltd		Logged	13/03/2015 12:58		
26484	Outside Service		Protean Software Ltd		Logged	13/03/2015 12:58		
26371	Stores		Protean Software Ltd	(1 item)	Logged	01/12/2014 16:10		
26370	Stores		Protean Software Ltd	(3 items)	Logged	01/12/2014 16:10		
26369	Outside Service		Protean Software Ltd	(1 item)	Logged	01/12/2014 16:10		
26365	Administration		Protean Software Ltd	(1 item)	Logged	01/12/2014 15:22		

1 2 3 4 5 6

SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.1 - Equipment Out of Action (cont)

2.1.1 Web Portal (cont)

2.1.1.3 The Equipment List

When using the Equipment List on the Web Portal users will note that there is a new column labelled OOA (Out of Action). This column displays either Y (Yes) or is blank as appropriate.

Equipment

This is a list of all of equipment you own and also any equipment that you have on hire or rental.

Your Ref	Make	Model	Serial No	Site	Our No	Type	OOA
1990 Cust	RANSOME	L25		Protean Software Ltd	1990	Returned	
	MEZZANINE	FLOOR		Protean Software Ltd	8244	Sold	
	CROWN	20WRTF-3200		Protean Software Ltd	L2128	Reserve	Yes
	Unknown	Unknown		Protean Software Ltd	L2129	Reserve	
	CROWN	20WRTF-3200		Protean Software Ltd	L2131	Reserve	Yes
	Unknown	Stacker		Protean Software Ltd	L2169	Reserve	Yes
	Unknown	125S		Protean Software Ltd	L2188	Cross Hire	
	Unknown	125S		Protean Software Ltd	L2189	Reserve	Yes
	Unknown	JCB 525 58		Protean Software Ltd	L2794	Reserve	Yes
	Unknown	Counter Balance		Protean Software Ltd	96199	Customers Own	Yes
	CARPET	BOOM		Protean Software Ltd	AAT80001	Customers Own	Yes
	CARPET	BOOM		Protean Software Ltd	A5FT	Sold	
	Battery	DBY5		Protean Software Ltd	203	Sold	
	Unknown	FORK EXTENSIONS		Protean Software Ltd	5FT/1	On Hire	
	LANSING BAGNALL	FRER6.1 222FL		Protean Software Ltd	CP398	Reserve	Yes
	BEV	M 7571		Protean Software Ltd	CP405	Returned	
	VOLKSWAGEN	GOLF TDI		Protean Software Ltd	P385 OMK	On Sales Order	Yes
	CLARK	CEM 16X		Protean Software Ltd	S1079	On Order	
	HYUNDAI	HLF30C		Protean Software Ltd	S1087	Retired	
	ATIB	FORK ROTATOR		Protean Software Ltd	CH17	Retired	
	ATIB	FORK ROTATOR		Protean Software Ltd	234245345	Customers Own	Yes
	ALEXANDER	IP2'5ST		Protean Software Ltd	4356456456	Customers Own	Yes
	ATIB	FORK ROTATOR		Protean Software Ltd	6546	Returned	
	ATIB	778		Protean Software Ltd	455445	Reserve	
	ATIB	778		Protean Software Ltd	998866	On Sales Order	

2.1.1.4 Job Detail

The Equipment Condition field has been added to the Job Details screen on the Web Portal also. For a single equipment job it appears in the Equipment column marked as 'Condition'. For multi equipment jobs it appears as a column in the 'Equipment' section, displaying a Y (Yes) or N (No) as appropriate.

2.1.1.5 Equipment Detail

On the Equipment record the Equipment Condition is displayed ie Out of Action, Needs Work or Operational as part of the header under the equipment status (labelled 'Type') and above the meter readings.

SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.1.2 Office

The Equipment Condition indicator has been enhanced within the main office system. The condition can be updated via the Web Portal, the Equipment Record & the Engineer Mobile App. It can also be viewed on the Equipment List, Job List & Job screens.

2.1.2.1 Equipment Record

Equipment - 8356 - Mitsubishi/RF750 - 665465

Equipment
No.: 8356 Category: Telemetrics
Make: Mitsubishi Type: Phase 2
Model: RF750 Sub Type: Standard
Serial No: 665465
Status: Customers Own
Second Hand:
Asset:
Hire Rate: £0.00

Location
Depot: Service
Site: A00301
ABC Second Depot
Grove Lane
Smethwick
Birmingham
B66 2SL
Location: Factory
In Transit:

Contact
Name: Fred Smith Tel: 01332 46465

References
Customer's Equipment No: H2
Category 1
Category 2
System Ref
Vehicle Reg

Workshop
In Workshop:
Condition: ■ Out Of Action

Meter
Reading: 2500
Date Read: 07/11/2000

Buttons: Parts Fitted, Availability, Add Make & Model, Modify Equip No, Links, Create Copy, Close

The Condition can be changed here by simply selecting a different condition from the drop-down list. If you are changing the condition away from 'Out of Action' then a warning message is displayed to confirm the action.

2.1.2.2 Equipment List

Global Enquiry - Equipment - 1647 records

Equip No	Make	Model	Serial Number	Site Name	Equipment Category	Equipment Type	Equipment Subtype	Status
CGR002	Potterton	GVC 16.33	YB147165	ABC Machine Tools Ltd	Telemetrics	Phase 1	Standard	Sold
S1005	Potterton	GVC 16.45	7105017	ABC Machine Tools Ltd	Telemetrics	Phase 1	Standard	Sold
3381	Potterton	BOOM	8312684	ABC Second Depot	Compressor	Low Pressure Blow	Standard	On Hire
95075	Broomwade	GPM25N	M3750845GEF6041	ABC Second Depot	Compressor	Pressure Booster	Standard	On Hire
0989	Mitsubishi	RF750	23534369	ABC Second Depot	Telemetrics	Phase 2	Standard	Customers Own
76780	Mitsubishi	RF750	568557	ABC Second Depot	Telemetrics	Phase 2	Standard	Customers Own
8356	Mitsubishi	RF750	665465	ABC Second Depot	Telemetrics	Phase 2	Standard	Customers Own
0008	TrakGlobal	P200	8768687	ABC Second Depot	Telemetrics	Phase 1	Standard	On Hire
0021	TrakGlobal	P1000	6585855856	ABC Second Depot	Telemetrics	Standard	Standard	Sold
7195	Site	Record		ABC Second Depot	Site	Record	Standard	Customers Own

SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.1.1.2 Office (cont)

2.1.1.2.2 Equipment List

By default the Equipment List includes a column that displays Condition as a coloured square. This can be added or removed as needed. The list can be sorted (by clicking the column heading above the coloured square) and filtered (click the colour you want to filter by and click the 'Filter' button) by this field.

- Condition: Operational
- Condition: Needs Work
- Condition: Out of Action

2.1.1.2.3 Jobs List

Global Enquiry - Jobs - 524 records

Job No	Job Type	Site	Make & Model	OOA	Curr	Area	Due Date	To Do	Status
17475	Call out	ABC Second Depot	Mitsubishi RF750	1	JPC	Midlar	10/01/2019 16:11		Waiting Acceptanc
17446	Annual check inc CP12	ABC Second Depot		1	CJM	Midlar	08/06/2003 09:00	Mir	
17442	Call out	ABC Second Depot		1	MC	Midlar	06/12/2017 12:26	Che	
17395	Installation	Compton Packaging	TrakGlobal P200	1	TS	North	10/12/2002 11:39	Rep	
17385	Warranty Spares	ABC Second Depot	Mitsubishi RF750	1	Midlar	Midlar	06/11/2000 15:41	Sup	
17482	Refurbishment	ABC Machine Tools Ltd	Potterton GVC 16.4		Glasg	Glasg		Ref	
17481	Customer Abuse	ABC Second Depot			Midlar	Midlar	10/06/2019 16:46	Wo	
17480	Installation	ABC Machine Tools Ltd			Glasg	Glasg	24/01/2019 00:00	Neu	
17479	Installation	ABC Machine Tools Ltd			Glasg	Glasg	24/01/2019 00:00	Neu	
17478	Call out	ABC Second Depot			NHP	Midlar	23/01/2019 09:48	Cal	
17477	Annual check inc CP12 (Cu	Business Exhibitions Ltd	Broomwade GPM15		MC	North			
17476	Hire Breakdown	Business Exhibitions Ltd	Broomwade GPM15		NHP	North	11/01/2019 10:20		
17474	Call out	ABC Machine Tools Ltd			CJM	Glasg			
17473	Call out	ABC Machine Tools Ltd			Glasg	Glasg			
17472	Call out	ABC Machine Tools Ltd			CJM	Glasg			
17471	Service - Parts only	Business Exhibitions Ltd			North	North	24/09/2018 15:09		
17469	Customer Abuse	ABC Second Depot			CJM	Midlar	05/09/2018 12:17	Air	
17468	Call out	ABC Machine Tools Ltd			Glasg	Glasg	05/09/2018 12:15	efs	
17466	Call out	F G Landscape & Design			TS	East			
17465	Routine inspection	ABC Second Depot			B	Midlar		Car	
17464	Routine inspection	ABC Machine Tools Ltd			CJM	Glasg		tyu	
17463	Call out	ABC Machine Tools Ltd			MC	Glasg			

A new column has been added to the choice of columns on the Jobs List. To add the OOA column simply right-click the list and select OOA from the choices available. The OOA column will be added. The Jobs List can be sorted or filtered as normal by this field. The column displays the number of equipment on that job that have been marked as OOA.

2.1.1.2.4 Single Equipment Jobs

On a single equipment job the equipment details appear in the top left-hand corner of the screen. We have added the equipment condition indicator to this area so users can see the condition of this item of equipment. This takes the form of the usual coloured square, with red indicating the item is 'Out of Action'.

Equipment

8356 ...

Mitsubishi RF750
SN: 665465
Factory
Customers Own

Multi-Equipment

Main Labour Parts Mis

SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.1.2 Office (cont)

2.1.2.5 Multi Equipment Jobs

On the Equipment tab of the Job the condition indicator has been added to the equipment information.

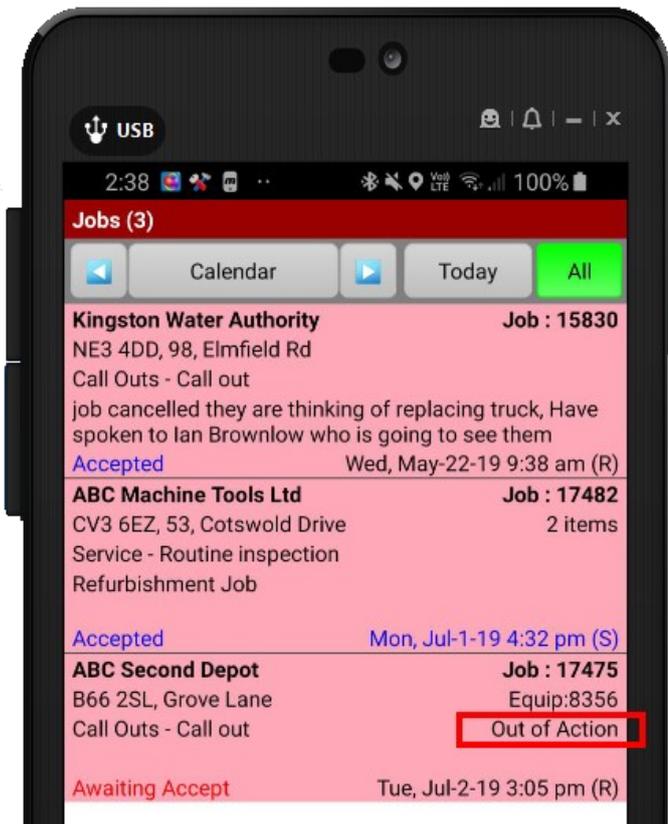


2.1.3 Engineer Mobile App

The Equipment Condition is also displayed on the mobile app for Engineers so that they are aware. This condition can be updated at the end of the job if appropriate that in turn will update the condition flag in the system & on the web portal so that customers know when an item has been returned to service.

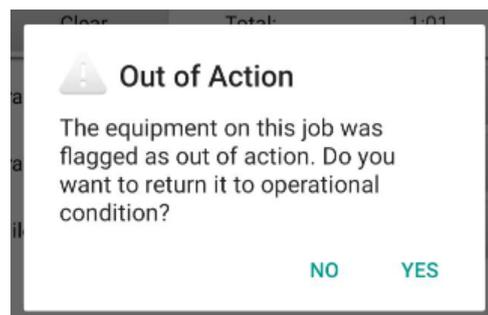
2.1.3.1 Single Equipment Jobs

When engineers receive a single equipment job featuring an item that is 'Out of Action' it is indicated in the Jobs List as shown below:



The words 'Out of Action' are displayed under the equipment number.

When the job is ready for completion the engineer can either go into the equipment details tab and manually set the condition to 'Operational', or go ahead and complete the job as normal and on entering the 'sign off' stage the app will ask if the condition should be updated.

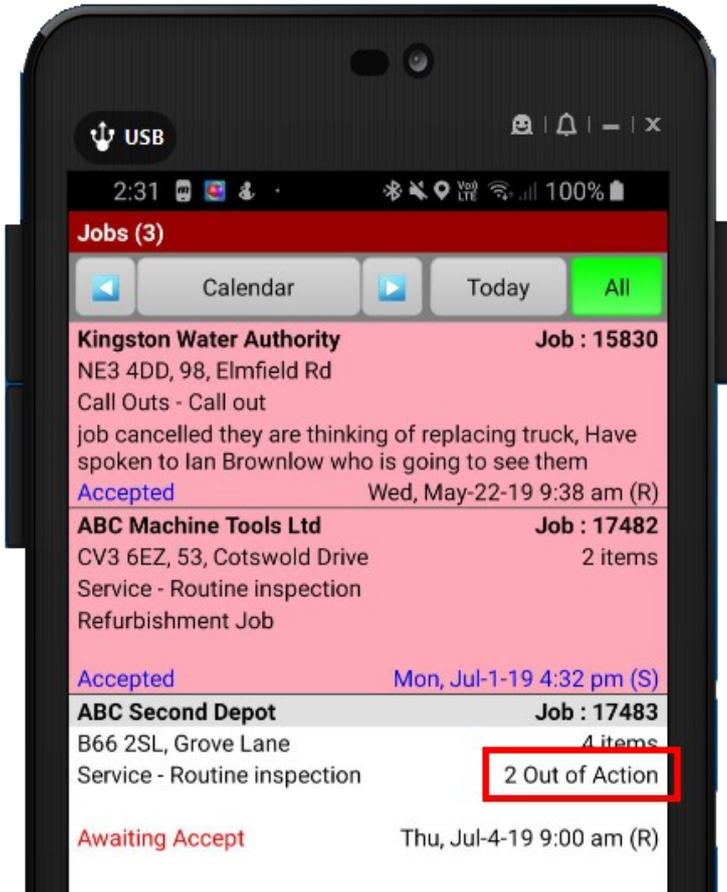


SECTION 2 - WHAT'S NEW IN THIS RELEASE

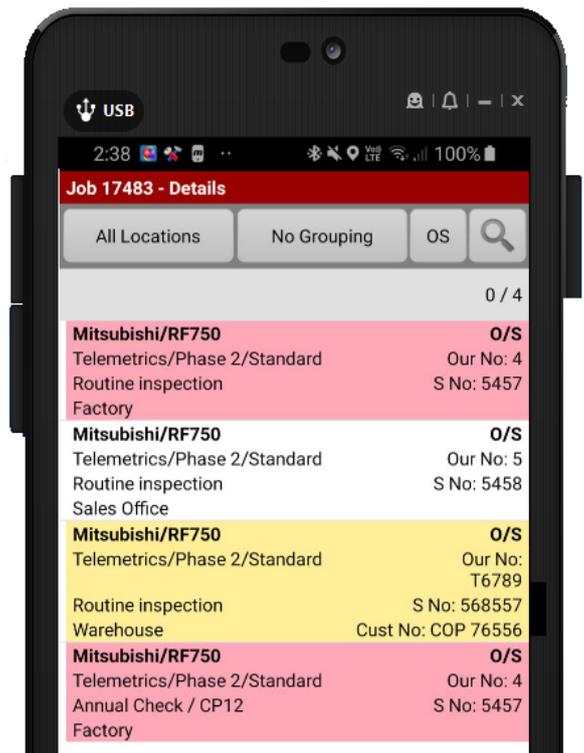
2.1.3 Engineer Mobile App (cont)

2.1.3.1 Multi Equipment Jobs

When engineers receive a multi-equipment job that has equipment flagged as 'Out of Action' it is indicated on the Jobs List on the mobile app:



When viewing the job details the engineer can see the list of equipment with the condition clearly indicated.



Here we can see that there are 2 Out of Action (Red) items and 1 Needs Work (Yellow) and 1 Operational (White). When the engineer has worked on an item of Equipment that is Red or Yellow & sets the equipment visit status to 'Done' the system will ask if the condition should be changed back to 'Operational'. This can also be done manually on the Equipment Details screen if needed or preferred.

SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.2 Web Portal - User Accounts

2.2.1 Moving Web Portal Log In to Contact Level

In order to improve the security & flexibility of web portal logins we have moved them from Site level to Contact level. This means that users can set up multiple log ins per Customer or Site, particularly useful in a help desk setting or when you need to know which individual has logged a job for example. It also means if an individual leaves users can simply remove their access without affecting the other logins at that company or having to change the password to prevent unlawful logins.

Previously the web portal login details were created & held at Customer or Site level. These have now been moved to a new 'Portal Access' tab on the Contact form:

The screenshot shows a web browser window titled "Customer Contact - Fred Smith". The window contains a form with three tabs: "Details", "Portal Access", and "Memo". The "Portal Access" tab is active. Inside this tab, there is a section with a checked "Allow" checkbox. Below it are three fields: "Security Profile" (a dropdown menu showing "CWI"), "User Name" (a text box containing "fredsmith@abc.co.uk"), and "Show data after" (a date picker showing "01/11/1987"). At the bottom of this section are two buttons: "Create Password" and "View Password". Below the main form area, there is a row of navigation icons (up, down, home, mail, print, refresh) and three buttons: "Tasks", "CRM History", and "Close".

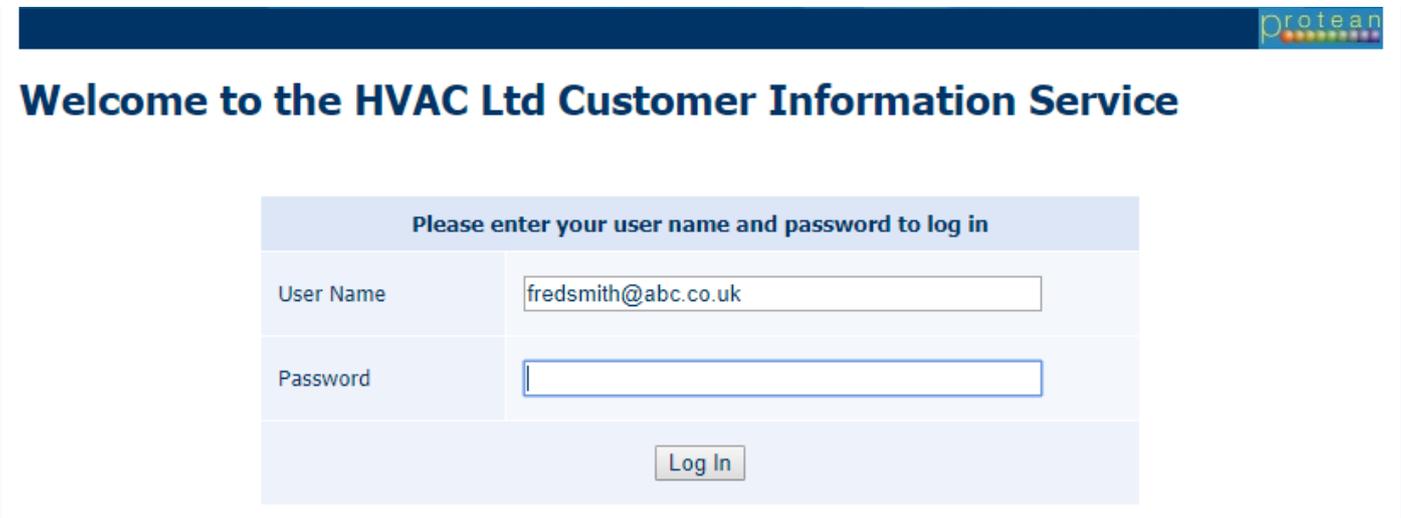
To set up a web portal log in against a contact :

1. Tick the 'Allow' box in the top left-hand corner to enable the web portal options.
2. Select a security profile from the drop-down list. This controls what this individual will be able to do on the web portal. New security profiles can be created in 'System/Security/Security Roles on the main menu.
3. Enter a user name. We recommend that this is their email address if available. It must be unique.
4. Select a date after which the data on the portal will be shown. You can use this feature to limit access to old data that you may not want to share with customers.
5. Finally, generate a password. The system will create a unique, high security password for this Contact but you can overtype it with one of your own if you prefer.

SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.2.2. Web Portal Changes

When your customers got to log into the portal there are some small changes related to moving the log ins to the Contact record. The system now asks for a User Name and on successful log in the customer is given a personalised greeting:



Welcome to the HVAC Ltd Customer Information Service

Please enter your user name and password to log in

User Name	<input type="text" value="fredsmith@abc.co.uk"/>
Password	<input type="password"/>



Welcome, Fred (ABC Machine Tools Ltd)

Please select an option from the dashboard below or from the menu bar above

Jobs	Equipment	Maintenance Contracts
18 open callouts & 8 open services	7 down / 6 up	You have 4 active contracts
17483 28/06/2019 Logged		1011 08/12/2017
17482 27/06/2019 Quoted		1006 06/11/2000 656565
17481 10/06/2019 Logged		1005 07/09/2000 090090
17480 24/01/2019 Logged		999 23/02/2000 654654
17479 24/01/2019 Logged		

2.2.3 What will happen when I upgrade to FR6?

When you upgrade to FR6 any web portal logins in existence will be migrated to a Contact record. Currently you can select a Contact to be used as an admin contact for the web portal with that Customer. Protean will add the log in details to that Contact record where possible, using the Contacts email address, if available. This means that you will need to let your customers know that the logins have changed and what other log ins they need and the Contacts to go with them.

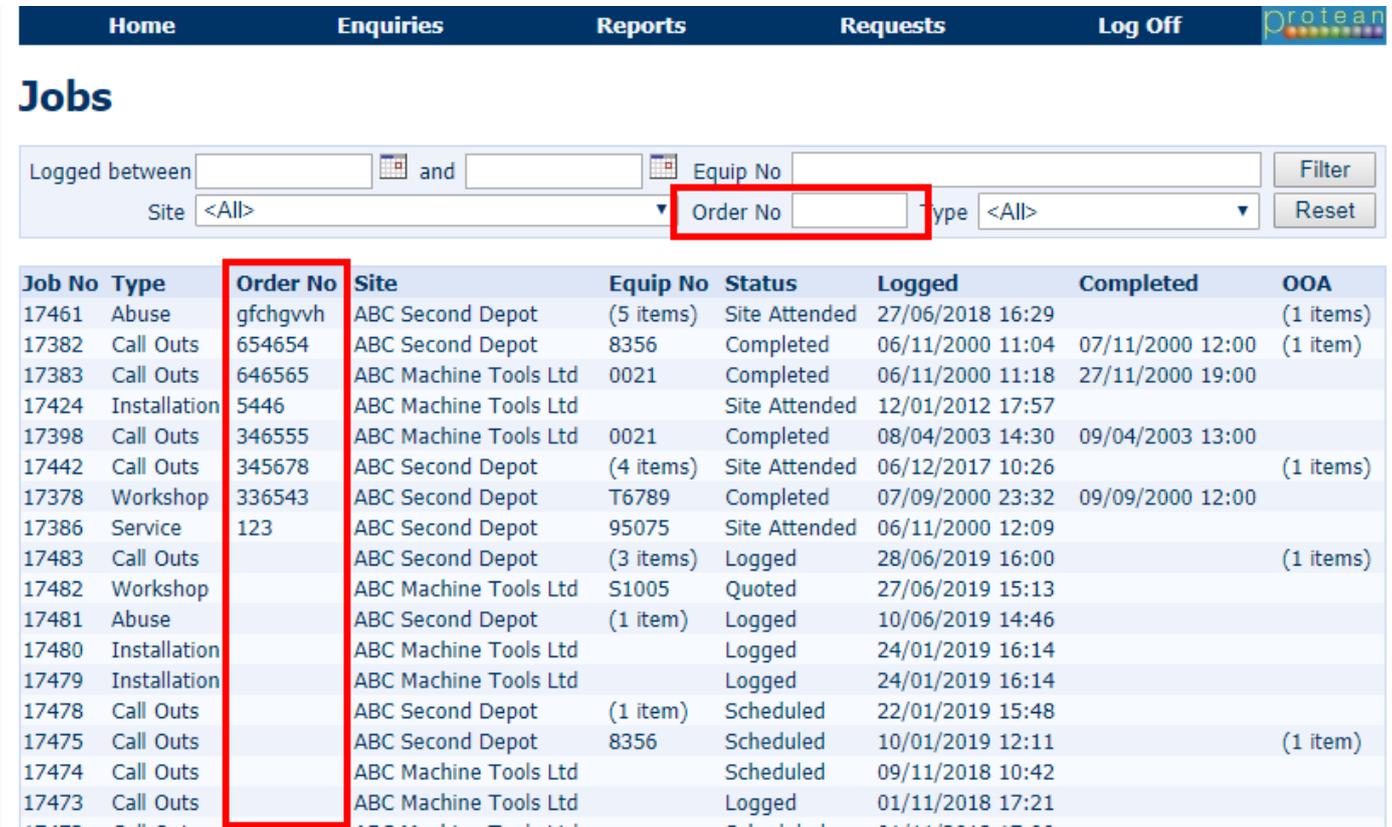
If there is no email address on the Contact record then the user name will remain empty. If there is no Contact record selected against the web portal then Protean will attempt to use the Equipment Contact email address if valid. If not the system will not attempt to automatically move the log in details. In this situation you will need to set the log ins up by hand as detailed above.

SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.3 Web Portal - Filtering Jobs by Order No

A new feature has been added to the Jobs list on the web portal. Users can now filter by Order No.

To filter enter the value you do know in the 'Order No' field in the filter boxes at the top of the list and click the 'Filter' button.



The screenshot shows the Protean web portal interface. At the top, there is a navigation bar with links for Home, Enquiries, Reports, Requests, and Log Off. Below this is the 'Jobs' section. A filter bar at the top of the jobs list includes fields for 'Logged between', 'Site', 'Order No', and 'Type'. The 'Order No' field is highlighted with a red box. Below the filter bar is a table of jobs with columns: Job No, Type, Order No, Site, Equip No, Status, Logged, Completed, and OOA. The 'Order No' column is also highlighted with a red box.

Job No	Type	Order No	Site	Equip No	Status	Logged	Completed	OOA
17461	Abuse	gfchgvrh	ABC Second Depot	(5 items)	Site Attended	27/06/2018 16:29		(1 items)
17382	Call Outs	654654	ABC Second Depot	8356	Completed	06/11/2000 11:04	07/11/2000 12:00	(1 item)
17383	Call Outs	646565	ABC Machine Tools Ltd	0021	Completed	06/11/2000 11:18	27/11/2000 19:00	
17424	Installation	5446	ABC Machine Tools Ltd		Site Attended	12/01/2012 17:57		
17398	Call Outs	346555	ABC Machine Tools Ltd	0021	Completed	08/04/2003 14:30	09/04/2003 13:00	
17442	Call Outs	345678	ABC Second Depot	(4 items)	Site Attended	06/12/2017 10:26		(1 items)
17378	Workshop	336543	ABC Second Depot	T6789	Completed	07/09/2000 23:32	09/09/2000 12:00	
17386	Service	123	ABC Second Depot	95075	Site Attended	06/11/2000 12:09		
17483	Call Outs		ABC Second Depot	(3 items)	Logged	28/06/2019 16:00		(1 items)
17482	Workshop		ABC Machine Tools Ltd	S1005	Quoted	27/06/2019 15:13		
17481	Abuse		ABC Second Depot	(1 item)	Logged	10/06/2019 14:46		
17480	Installation		ABC Machine Tools Ltd		Logged	24/01/2019 16:14		
17479	Installation		ABC Machine Tools Ltd		Logged	24/01/2019 16:14		
17478	Call Outs		ABC Second Depot	(1 item)	Scheduled	22/01/2019 15:48		
17475	Call Outs		ABC Second Depot	8356	Scheduled	10/01/2019 12:11		(1 item)
17474	Call Outs		ABC Machine Tools Ltd		Scheduled	09/11/2018 10:42		
17473	Call Outs		ABC Machine Tools Ltd		Logged	01/11/2018 17:21		

2.4 Sales App Licence Control

This release of Protean includes the licence control for the new mobile sales app, a browser-based app for sales staff incorporating all of the CRM functionality in Protean. In order to allow access to the app you will need a new licence key and to set up the licence records within Protean, and then invite the potential sales users to access the app.

Settings

1. As part of setting up access to the Sales App you first need to ensure the setting 'Email Server SMTP Address' has been populated in *System / General / Settings*. You might need to check with your IT dept what this address is.



The screenshot shows a table with the following content:

Email Server SMTP Address	192.168.0.45
---------------------------	--------------

Employee Record

1. Go to System / General / Employees
2. Find the Sales Person you want to give access to the Sales App (or create a new one).
3. Make sure you tick the 'Sales' box to flag this user as a sales person.
4. On the 'login' tab select 'Sales' from the drop-down list labelled 'Mobile App' and populate the email address box on the right. This will be used to send the invitation out to the new user that will allow them to access the sales app.
5. Create a User Name & Password for the sales person. This will be sent to them as part of their invitation to the app.

SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.4 Sales App Licence Control (cont)

Employee - Bill Smith

General Login Engineer Attributes Purchasing Messaging Other

User Type: Full

Mobile App: Sales Send Invite To: bill.smith@abc.co.uk

Login name: Bill

Set password...

Advanced user: Demo mode:

Role performed by this employee

Admin

Mobile Device:

OK Cancel Apply

Licence Manager

1. Obtain a new licence key from Protean Software by contacting your account manager or calling us on 02476710300. For existing users with a full licence access to the sales app is free of charge. For pricing enquiries please contact your account manager.
2. Enter the new licence key in *System / Security / License Manager*
3. On the right-hand side of the screen select the 'Sales App Users' section and click 'Add New' at the bottom. A list appears containing the sales people you have already configured to have access to the sales app. Select the first name you want to add and click 'OK'
2. The sales person selected will receive an two emails. The first containing their user name and a link to the app and the second containing their password.

License Manager

General

Serial No: 10002

Licenses: 12

Type: Concurrent

Expiry Date: 30 November 2019

User Types

Type	Licenses
Full	4
CRM	0
Mobile Engineer	6
Sales App	2

Modules

Customer Web Access
Equipment
Hire
Job
Maintenance Contracts
Stock

License Allocations

Licenses

- Mobile Engineers
 - POCKETPC_1
 - POCKETPC_5
- Sales App Users
 - Neil Plumbley

Add Sales App User

Please select the user name of the Salesperson to license.

Bill Smith
Neil Plumbley

Add Remove

Enter New License Key Close