New Starter User Guide

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Protean Software

Protean (Pro-tea-un) *adjective* has two meanings:

1. Able to change form: variable, changing in nature or appearance.
2. Versatile: showing great variety, diversity or versatility.

The adjective **Protean** comes from Proteus, a Greek sea god. He was the son of Poseidon, god of the sea. Proteus knew all things past, present and future but was able to change his shape at will to avoid prophesying. Each day at noon Proteus would rise from the sea and sleep in the shade of the rocks on the island of Pharos.

Anyone wishing to learn the future had to catch hold of him at that time and hold on as he assumed dreadful shapes, including those of wild animals and terrible monsters.

If none of his ruses prevailed, Proteus resumed his usual form and told the truth. Among those who fought with Proteus to learn the truth was Menelaus, King of Sparta.

Contact Details:

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Protean Software General Navigation

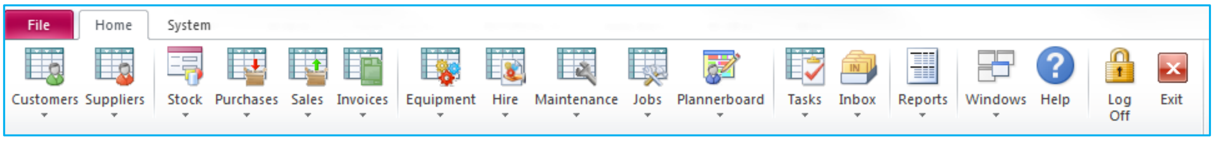
Once you have logged into Protean there are 3 Tabs – File / Home / System.

File: contains information about the version of Protean you are running and contact details for Protean Support.

Home: is the tab that you will go to when logged into Protean, this contains all the items you will use on a day to day basis within Protean.

System: is where the settings and setup of Protean is done, so any configuration details will be done through this tab.

Home Tab: this is what we call the Protean Ribbon:

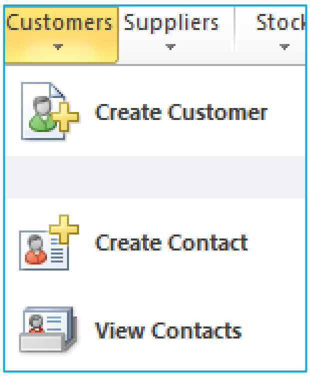


This is broken up into sections for each module that you have access to.

There is a global enquiry button 

and a drop down for each section. 

If you hit the dropdown it gives you the other functionality to do with this section of Protean.

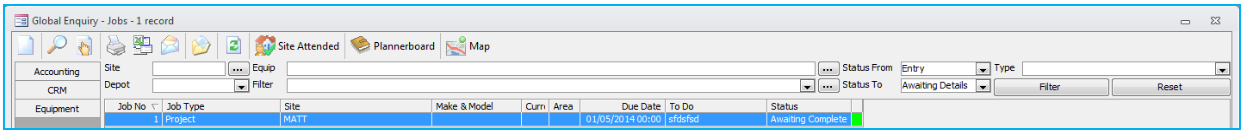


Depending on which section you click on you will get different options.

The example here is the customers section.

(Again these options can be controlled by access rights).

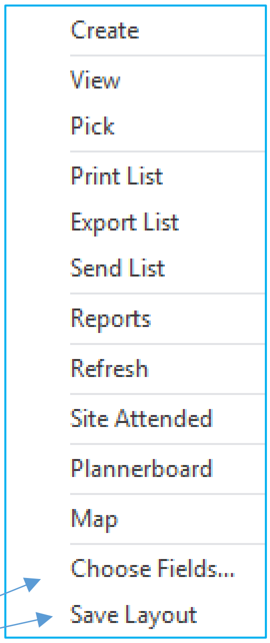
If you hit the Global Enquiry button, this brings up a list of all the current items within this section of Protean.



These Lists (Global Enquiries) are how each individual user can quickly get the information they need, about that particular module of protean.

Global Enquiry Screens

Every global enquiry has common buttons at the top left, which are also available by right clicking on within the middle of the global enquiry:



Create, creates a new record.

View drills into the record selected.

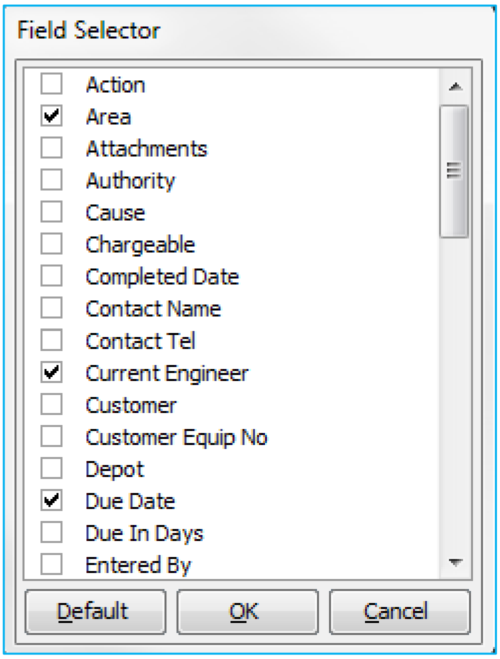
Pick is used when a global enquiry is bought up within another record.

Print / Export / Send will send your list to Printer / Excel / Email.

Reports will shortut to the reports for this module of Protean

Refresh just refrehses your list (can be set to happen automatically).

The final 2 options are for customising the Global Enquiry view per user.



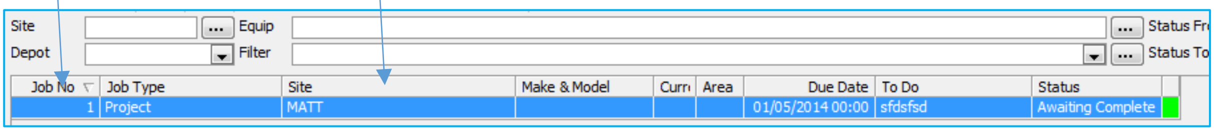
Choose Fields brings up a lit of fields you can see, tick any you want, untick any you don't want.

This then dispays these fields this one time you are in the global enquiry.

If you wish (per user) to always see these fields, then right click on the global enquiry and click "Save Layout".

Save Layout can also be used to save a users prefernce for a sort order, or column order within each global enquiry screen, which can be achieved by clicking on or dragging a column as below.

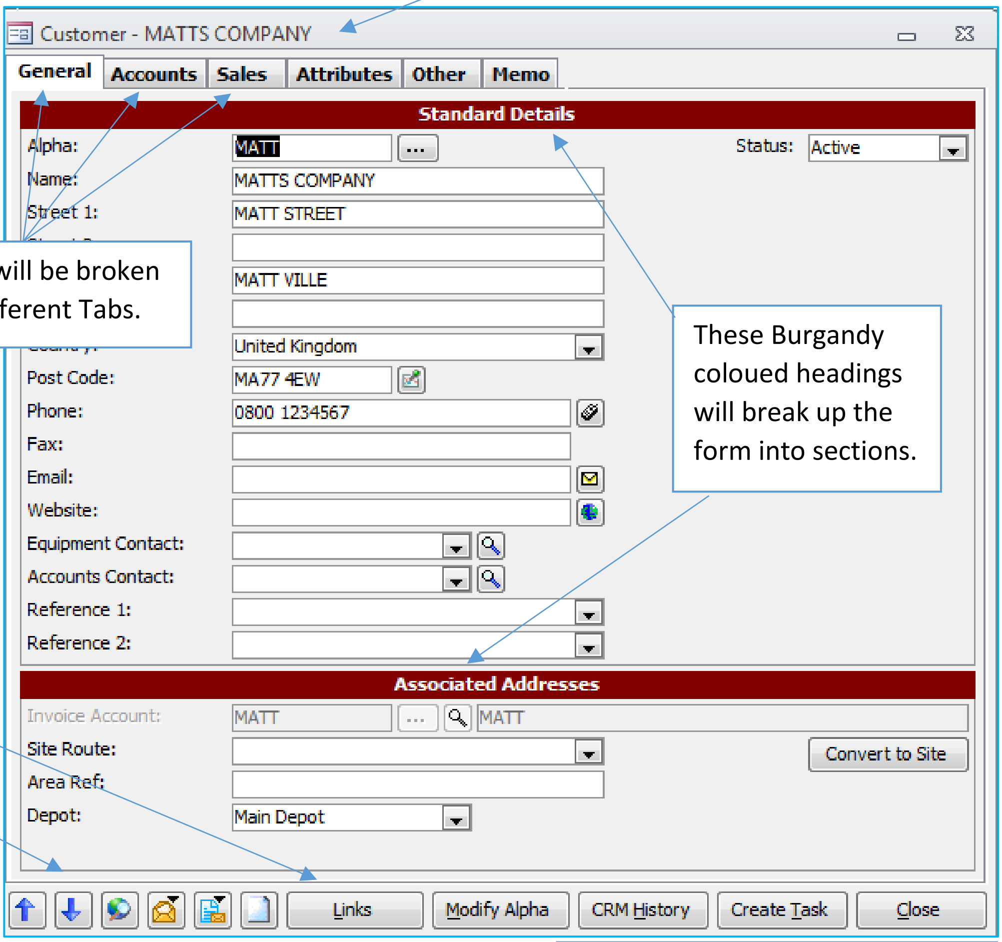
Click to sort. Click and hold to drag



Common Layouts & Features:

When you are in a record within Protean it will follow a common layout:

The Top left will show you where you are / what you are looking at.



The form will be broken up into different Tabs.

These Burgandy coloued headings will break up the form into sections.

And the bottom of the form will have buttons.

The first 6 are consistant in every module.

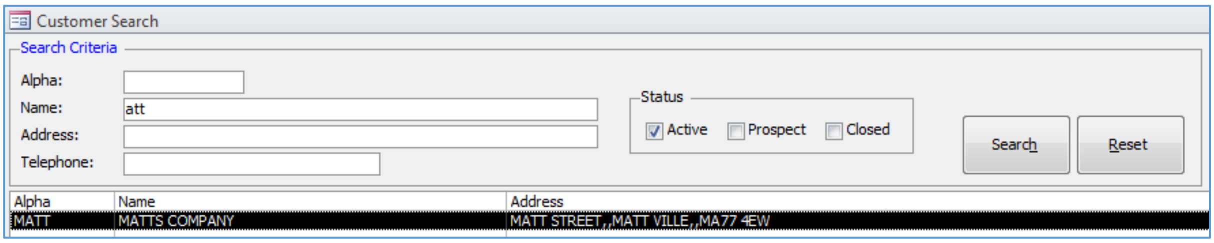
The other ones depend on what type of record you are viewing.

Other Common Features:

These (…) buttons will open up a Search screen.

A Magnifying Glass will Drill into a record and move you to that record in Protean.

If you open up a search screen in Protean, its an automatic smart search, so it will wildcard before and after what you type, and you can fill out any, or a combination of search boxes.

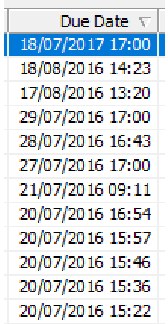


Global Enquiry Filters

On the various Global Enquiry screens, below the icons are a row of filters. These allow you to cut down the data list in the main part of the screen, so that you only see the data you need:

Sorting

Below the filters are the column headings of the data themselves, which can also act as sort buttons. Clicking on them will alter the order of the data below.



Due Date
18/07/2017 17:00
18/08/2016 14:23
17/08/2016 13:20
29/07/2016 17:00
28/07/2016 16:43
27/07/2016 17:00
21/07/2016 09:11
20/07/2016 16:54
20/07/2016 15:57
20/07/2016 15:46
20/07/2016 15:36
20/07/2016 15:22

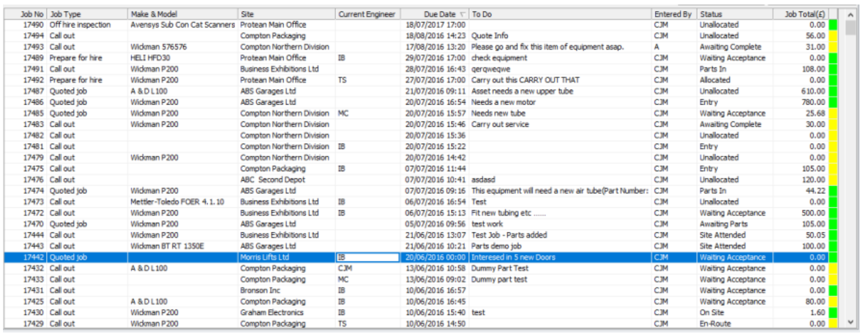
For example:
In the Jobs Global Enquiry screen, the list is initially displayed in Job No order with the newest at the top. If you wanted to see the list of Jobs, say, in Due Date order, you can simply click the **Due Date** heading:

NB This sorting can be done on all column headings except 'To Do' on the Jobs Tab.

Filtering in the list

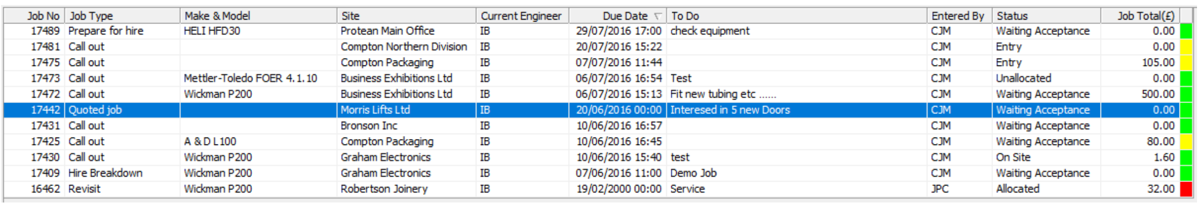
To further help you find the data you require, you can also filter the data list by the contents of any 'cell' in the data sheet using the Filter button.

For example:
Let's say I wanted to see all the O/S Jobs for a particular Engineer. First of all, find his / her initials in the list of data and then single click to highlight the initials:



Job No	Job Type	Make & Model	Site	Current Engineer	Due Date	To Do	Entered By	Status	Job Total(£)
17490	Off hire inspection	Avensys Sub Con Cat Scanners	Protean Main Office		18/07/2017 17:00		CJM	Unallocated	0.00
17494	Call out		Compton Packaging		18/08/2016 14:23	Quote Info	CJM	Unallocated	56.00
17493	Call out	Wickman 576576	Compton Northern Division		17/08/2016 13:20	Please go and fix this item of equipment asap.	A	Awaiting Complete	31.00
17489	Prepare for hire	HELI HFD30	Protean Main Office	IB	29/07/2016 17:00	check equipment	CJM	Waiting Acceptance	0.00
17491	Call out	Wickman P200	Business Exhibitions Ltd		28/07/2016 16:43	qerqweqwe	CJM	Parts In	108.00
17492	Prepare for hire	Wickman P200	Protean Main Office	TS	27/07/2016 17:00	Carry out this CARRY OUT THAT	CJM	Allocated	0.00
17487	Quoted job	A & D L100	ABS Garages Ltd		21/07/2016 09:11	Asset needs a new upper tube	CJM	Unallocated	610.00
17486	Quoted job	Wickman P200	ABS Garages Ltd		20/07/2016 16:54	Needs a new motor	CJM	Entry	780.00
17485	Quoted job	Wickman P200	Compton Northern Division	MC	20/07/2016 15:57	Needs new tube	CJM	Waiting Acceptance	25.68
17483	Call out	Wickman P200	Compton Northern Division		20/07/2016 15:46	Carry out service	CJM	Awaiting Complete	30.00
17482	Call out		Compton Northern Division		20/07/2016 15:36		CJM	Unallocated	0.00
17481	Call out		Compton Northern Division	IB	20/07/2016 15:22		CJM	Entry	0.00
17479	Call out	Wickman P200	Compton Northern Division		20/07/2016 14:42		CJM	Unallocated	0.00
17475	Call out		Compton Packaging	IB	07/07/2016 11:44		CJM	Entry	105.00
17476	Call out		ABC Second Depot		07/07/2016 10:41	asdasd	CJM	Unallocated	120.00
17474	Quoted job	Wickman P200	ABS Garages Ltd		07/07/2016 09:16	This equipment will need a new air tube(Part Number:	CJM	Parts In	44.22
17473	Call out	Mettler-Toledo FOER 4.1.10	Business Exhibitions Ltd	IB	06/07/2016 16:54	Test	CJM	Unallocated	0.00
17472	Call out	Wickman P200	Business Exhibitions Ltd	IB	06/07/2016 15:13	Fit new tubing etc	CJM	Waiting Acceptance	500.00
17470	Quoted job	Wickman P200	ABS Garages Ltd		05/07/2016 09:56	test work	CJM	Awaiting Parts	105.00
17444	Call out	Wickman P200	Business Exhibitions Ltd		21/06/2016 13:07	Test Job - Parts added	CJM	Site Attended	50.05
17443	Call out	Wickman BT RT 1350E	ABS Garages Ltd		21/06/2016 10:21	Parts demo job	CJM	Site Attended	100.00
17442	Quoted job		Morris Lifts Ltd	IB	20/06/2016 00:00	Interesed in 5 new Doors	CJM	Waiting Acceptance	0.00
17432	Call out	A & D L100	Compton Packaging	CJM	13/06/2016 10:58	Dummy Part Test	CJM	Waiting Acceptance	0.00
17433	Call out		Compton Packaging	MC	13/06/2016 09:02	Dummy part test	CJM	Waiting Acceptance	0.00
17431	Call out		Bronson Inc	IB	10/06/2016 16:57		CJM	Waiting Acceptance	0.00
17425	Call out	A & D L100	Compton Packaging	IB	10/06/2016 16:45		CJM	Waiting Acceptance	80.00
17430	Call out	Wickman P200	Graham Electronics	IB	10/06/2016 15:40	test	CJM	On Site	1.60
17429	Call out	Wickman P200	Compton Packaging	TS	10/06/2016 14:50		CJM	En-Route	0.00

Then click the **Filter** button. The list automatically limits itself to only O/S jobs for that Engineer:



Job No	Job Type	Make & Model	Site	Current Engineer	Due Date	To Do	Entered By	Status	Job Total(£)
17489	Prepare for hire	HELI HFD30	Protean Main Office	IB	29/07/2016 17:00	check equipment	CJM	Waiting Acceptance	0.00
17481	Call out		Compton Northern Division	IB	20/07/2016 15:22		CJM	Entry	0.00
17475	Call out		Compton Packaging	IB	07/07/2016 11:44		CJM	Entry	105.00
17473	Call out	Mettler-Toledo FOER 4.1.10	Business Exhibitions Ltd	IB	06/07/2016 16:54	Test	CJM	Unallocated	0.00
17472	Call out	Wickman P200	Business Exhibitions Ltd	IB	06/07/2016 15:13	Fit new tubing etc	CJM	Waiting Acceptance	500.00
17442	Quoted job		Morris Lifts Ltd	IB	20/06/2016 00:00	Interested in 5 new Doors	CJM	Waiting Acceptance	0.00
17431	Call out		Bronson Inc	IB	10/06/2016 16:57		CJM	Waiting Acceptance	0.00
17425	Call out	A & D L100	Compton Packaging	IB	10/06/2016 16:45		CJM	Waiting Acceptance	80.00
17430	Call out	Wickman P200	Graham Electronics	IB	10/06/2016 15:40	test	CJM	On Site	1.60
17409	Hire Breakdown	Wickman P200	Graham Electronics	IB	07/06/2016 11:00	Demo Job	CJM	Waiting Acceptance	0.00
16462	Revisit	Wickman P200	Robertson Joinery	IB	19/02/2000 00:00	Service	JPC	Allocated	32.00

Note: Clicking on the Reset button will then re-display the original list of records again.

Site Filter:

You may be looking at a list of Jobs. By default this will display a list of all outstanding Jobs with the newest Job at the top. If you only wanted to see outstanding Jobs for a particular Site, then you could use the Site filter:

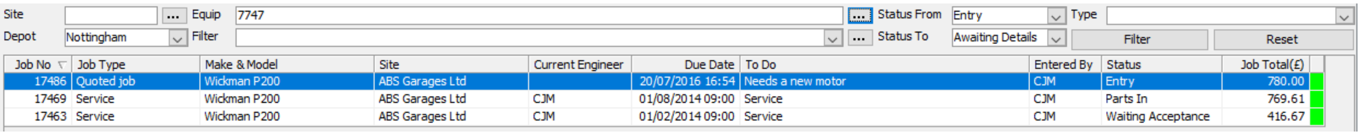
If you know the complete Account Code for the Customer/Site, then enter it into this field and press **Enter**. The system will then display a list of Jobs displaying the account code entered. You can then access the record required, by double clicking on any field displayed.

Note: Clicking on the Reset button will then re-display the original list of records again.

Equipment Filter:

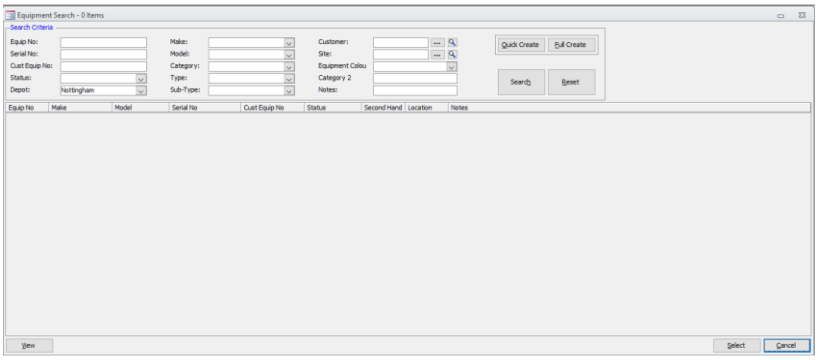
Another useful Filter available in some Global Enquiry screens, is the Equipment Filter:

If you know the equipment number, you can just enter it in the field and press **Enter**. The screen will then display a list of Jobs that are linked to the equipment number entered:



Job No	Job Type	Make & Model	Site	Current Engineer	Due Date	To Do	Entered By	Status	Job Total(£)
17486	Quoted job	Wickman P200	ABS Garages Ltd		20/07/2016 16:54	Needs a new motor	CJM	Entry	780.00
17469	Service	Wickman P200	ABS Garages Ltd	CJM	01/08/2014 09:00	Service	CJM	Parts In	769.61
17463	Service	Wickman P200	ABS Garages Ltd	CJM	01/02/2014 09:00	Service	CJM	Waiting Acceptance	416.67

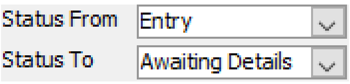
If you don't know the Equipment Number, then you can click on the ... button and use the search screen shown below, to search for the Equipment record required:



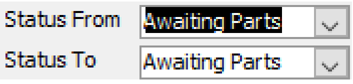
Enter the criteria required and then click on the Search button to display the matching records. To select a record, either double click on the record required, or single click on the record to select it and then click on the **Select** button.

Status Filter:

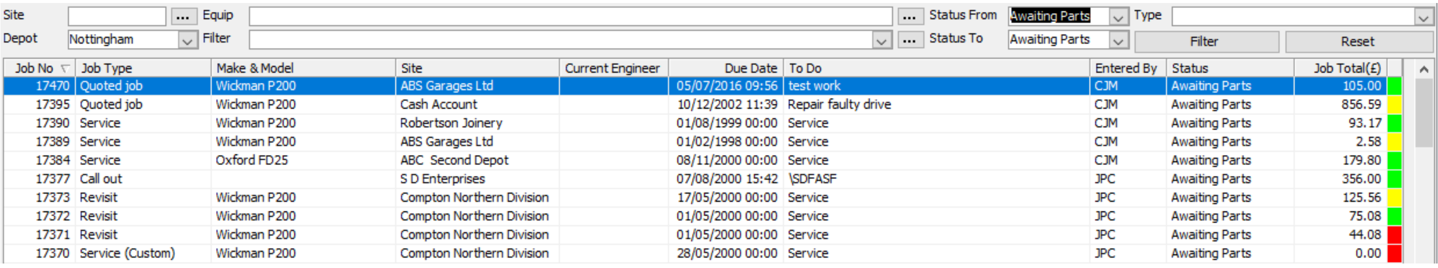
In all Global Enquiry screens, you can use the Status fields to alter the list of items displayed, based on their Status:



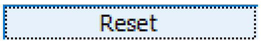
For example:
You may be viewing the Jobs Global Enquiry screen. By default this will display a list of all outstanding Jobs with the newest Job at the top. If you only wanted to see Jobs that had outstanding parts purchase orders on them, you could then change the **Status From** field to **Awaiting Parts**:



The system will then automatically display all of the Jobs that currently have that particular status:



Job No	Job Type	Make & Model	Site	Current Engineer	Due Date	To Do	Entered By	Status	Job Total(£)
17470	Quoted job	Wickman P200	ABS Garages Ltd		05/07/2016 09:56	test work	CJM	Awaiting Parts	105.00
17395	Quoted job	Wickman P200	Cash Account		10/12/2002 11:39	Repair faulty drive	CJM	Awaiting Parts	856.59
17390	Service	Wickman P200	Robertson Joinery		01/08/1999 00:00	Service	CJM	Awaiting Parts	93.17
17389	Service	Wickman P200	ABS Garages Ltd		01/02/1998 00:00	Service	CJM	Awaiting Parts	2.58
17384	Service	Oxford FD25	ABC Second Depot		08/11/2000 00:00	Service	CJM	Awaiting Parts	179.80
17377	Call out		S D Enterprises		07/08/2000 15:42	\SDFASF	JPC	Awaiting Parts	356.00
17373	Revisit	Wickman P200	Compton Northern Division		17/05/2000 00:00	Service	JPC	Awaiting Parts	125.56
17372	Revisit	Wickman P200	Compton Northern Division		01/05/2000 00:00	Service	JPC	Awaiting Parts	75.08
17371	Revisit	Wickman P200	Compton Northern Division		01/05/2000 00:00	Service	JPC	Awaiting Parts	44.08
17370	Service (Custom)	Wickman P200	Compton Northern Division		28/05/2000 00:00	Service	JPC	Awaiting Parts	0.00

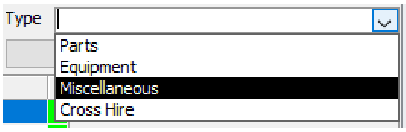
Note: Clicking on the 

button will then re-display the original list of records again.

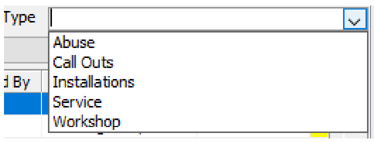
Type Filter:

In some of the Global Enquiry screens, you can use the **Type** filter to narrow down the list of records displayed, dependent upon their Type. The list of types available, will depend upon which Global Enquiry screen is being accessed and also what has been setup by your Company.

For example:



1. In the **Purchase Orders** Global Enquiry screen, you only get the following Types to choose from (This list is "hard coded" into Protean and can't be amended):



2. In the **Jobs** Global Enquiry screen, you get a list based on the Job Type Groups setup by your Company and attached to the Job Types that have been setup (This list is setup by your Company and can be amended):

Depot Filter:

If your Company has more than one depot, then on the majority of the Global Enquiry screens, this field can be used to narrow down the list displayed as required:

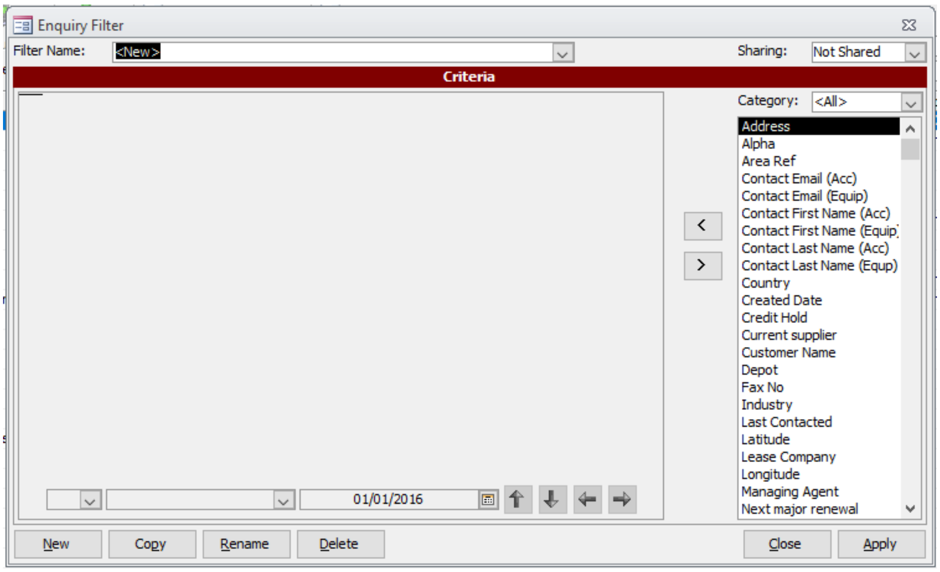
Global Enquiry – User Defined Filters

The user-defined Filter is a tool that is used in association with Global Enquiry. It allows you to search the list of Jobs, Customers, Suppliers, Contacts, Equipment, Jobs, Makes & Models, Tasks, Sales Opportunities and Quotes using specific criteria that you can select.

To setup a User Defined Filter, follow these steps:

1. Go to any of the above Global Enquiry screens.
2. Use the ... button next to the 'Filter' drop-down list in the top-middle section of the Global Enquiry screen:

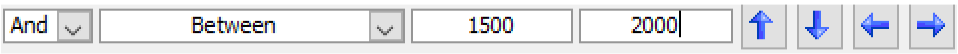
3. The system will then display a screen similar to the one shown below:



4. To create a new Query, click the **New** button shown in the bottom left hand corner of the screen (If you have previously saved a Query and you wish to re-use it simply select it from the drop-down list at the top of the screen.)
5. Then select what criteria to use in this Query. In the right-hand window you will see a list of all the fields from the screen of the relevant item (e.g. Equipment) plus, for Equipment, Customers & Sales Opportunities this window also contains any Attributes that have been set up.
6. That you can select by high lighting the field and then use the 2 arrows to select and un-select as required:

7. Then select the Field chosen and then apply the condition required:

For example: You may want to search your Equipment listings, for all Equipment with a Capacity between 1500kgs and 2000kgs. In the Master List on the right-hand side find Capacity in the list (if you have created it as an Attribute). Then use the Modify list to select the 'operator'. In this example it would be 'Between'. Then enter the values in the field alongside, in this case 1500 and 2000:



For example: Select the field called Post Code and then use the Condition “Equal to” and then enter the text “B*”, will then find all Customers that have a post code beginning with B:

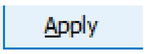
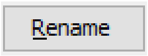
<u>Multiple Conditions:</u>

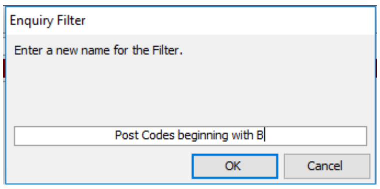
By choosing various fields with various conditions, you can create a defined list of records to be used on a Sales Campaign that needs creating for example.

Example: In this example, a company requires a list of Customers in the Birmingham area, who have a Renewal Date in November 2016. The system has already been setup with a Customer Attribute of “Next Major Renewal”. The advanced filter has been setup to create a list of the required customers with a renewal date in a certain date range using the conditions as follows:

- **Post Code ‘Equal to’ b*:** This will only search for Customer Records who have a post code beginning with B.
- **‘Next major Renewal’ between 01/11/2016 and 30/11/2016:** This will only search for Customer Records that have had this attribute added with a date in the range entered.

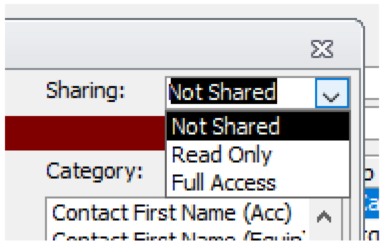
Note: By using the Operator of **AND**, the list will only find Customer Records that satisfy both conditions. The alternative Operator of **OR**, can be used if you want the data to be displayed to satisfy either conditions.

8. To see the results of this Query, click on the  button.
9. To save this Query for later, firstly click on the  button. You will then be prompted for a name to save it under:

   Once entered, click on **OK**.

10. If you choose to save this query you can then set the sharing level in the top right-hand corner of the screen:

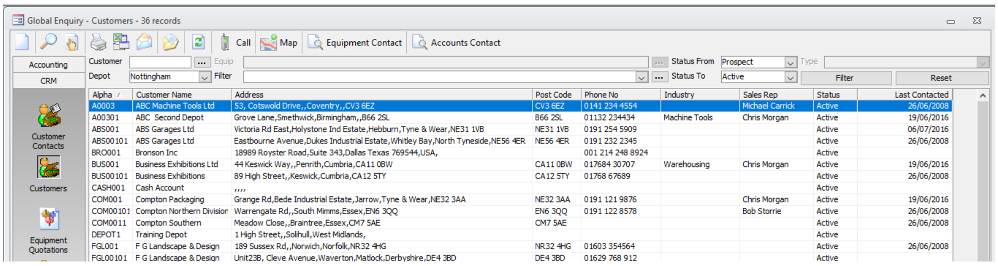
    

    - **Not Shared:** Means that this filter will only appear for selection when you log in to Protean and no other users.
    - **Read-Only:** Means that all users will be able to use it but that only you can alter or amend it.
    - **Full Access:** Means that all users can use and amend this filter.

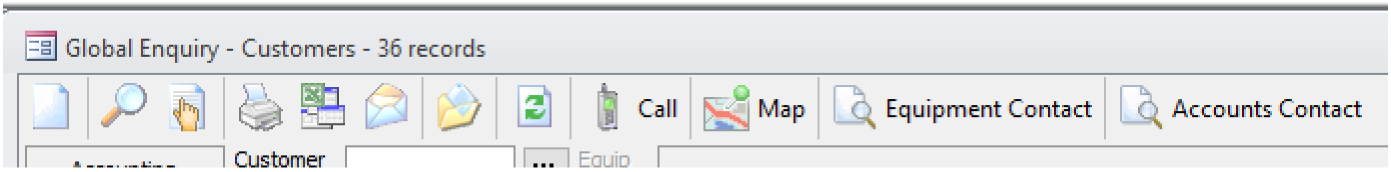
Customer Records

To view a list of Customers in the Protean system, click on the Customer Global Enquiry icon:

The system will then display a screen similar to the one shown below:



Every global enquiry has common buttons at the top left, which are also available by right clicking the mouse button within the middle of the global enquiry.



- **Create:** Used to create a new item.
- **View:** Drills into the record selected.
- **Pick:** Used when a global enquiry is bought up within another record.
- **Print / Export / Send:** Used to send the list to Printer / Excel / Email.
- **Reports:** Provides a shortcut to the reports for this module of Protean.
- **Refresh**: Refrehses the list displayed (Can be set to happen automatically).
- **Call:** Provides a quick link to be able to call a customer
- **Map:** If a site is using MicroSoft MapPoint, this will then display a screen showing the location of each Job displayed in the Global Enquiry screen and their current status.
- **Equipment Contact:** Is a quick link to view the details of the Equipment Contact for the record selected.
- **Accounts Contact:** Is a quick link to view the details of the Accounts Contact for the record selected.

Note: If Protean is linked to accounts software, then you should create any new invoice accounts in your accounts software and use the import facility to bring over the new codes to Protean. This ensures data integrity so that when Protean outputs sales invoices later, your accounts software will accept them.

General Tab:

This screen displays general information for the customer, such as Name, Address, Telephone Number, Email Address, Contract Details etc.

Accounts Tab:

This screen is used to set various settings in connection with Invoicing the customer, such as their Invoice Cycle, which email address to use to email the invoice(s) to, Labour Profiles, making Order Numbers mandatory, Credit Control, displaying balances from the Accounts system etc.

Sales Tab:

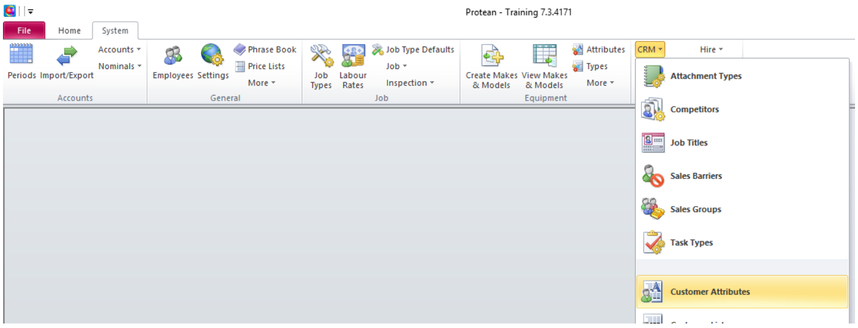
This screen will display information mainly used in the CRM Module, such as the Sales Representative, when was the customer last contacted and possibly some information about the Customer.

Attributes Tab:

Customer Attributes allow you to store additional information about a Customer. They are completely user-defined, allowing you to hold as much or as little information as you wish about any customer on Protean. There are various 'Types' of Attribute that essentially govern in what form the information is held. These Types are Numeric, Text, Yes/No, List & Date.

Each Attribute can also be Categorised (again using user-defined Categories), to enable you to control long lists of information.

They are setup by clicking on the **System Tab ¦ CRM ¦ Customer Attributes**:



Other Tab:

This screen can be used to record **Site Notes**, which can be very useful as these can be accessed by the Engineers on the PDA's.

Memo Tab:

This screen can be used to setup Pop Up notes, which will then be displayed on the Protean Office system. If you wish the note to appear every time a user accesses this Customer (or associated record), then put a tick in the **Recur** field next to the appropriate **Document Type**.

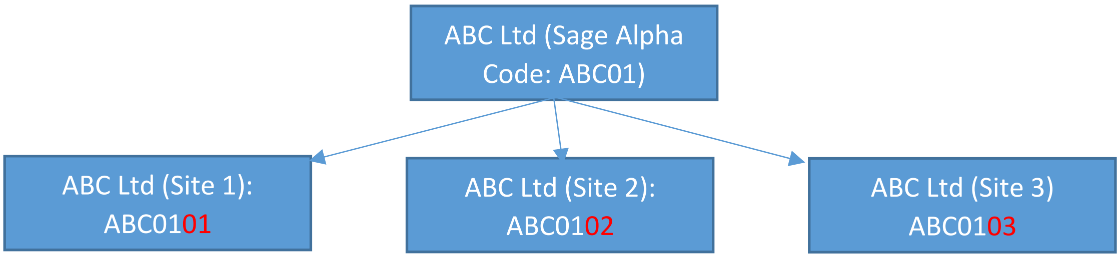
General Notes can also be entered here about the Customer, these don't display anywhere else and don't appear on any printed documentation.

Creating a Delivery / Site Account

If a customer has only one site address, then there isn't anything further you need to do, as Protean will use the SAGE Alpha code that we've already imported for you.

However, if a customer has additional Delivery / Site addresses, linked to their main SAGE invoice address, then you need to setup the additional site codes on Protean.

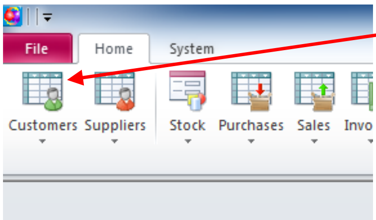
Example:
A Company called ABC Ltd has a Sage Account Code of ABC01 (Invoice Site) and also 3 site addresses, which each have their own Protean Alpha Code. This is made up of the Sage Alpha Code for the Invoice Address, plus an additional 2 digit number at the end:



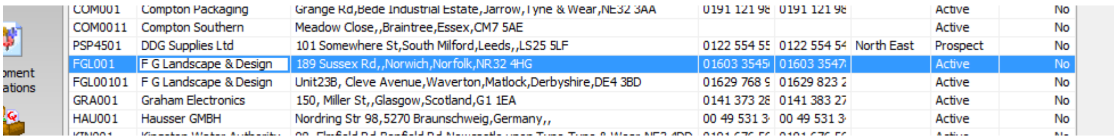
<u>Creating a Delivery / Site Account:</u>

In order to setup an additional site address for a customer, you will need to follow these steps:

1. Search for the existing Customer Alpha code, by clicking on the Customers Global Enquiry screen:

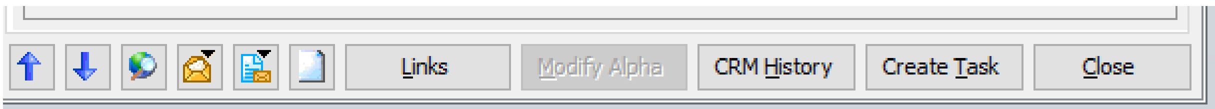


2. Select the Customer that you wish to add an additional site address to, by double clicking on the existing Alpha Customer record displayed:

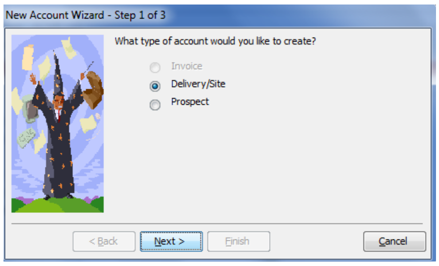


COM001	Compton Packaging	Grange Rd,Bede Industrial Estate,Jarrow,Tyne & Wear,NE32 3AA	0191 121 98	0191 121 98		Active	No
COM0011	Compton Southern	Meadow Close,,Braintree,Essex,CM7 5AE				Active	No
PSP4501	DDG Supplies Ltd	101 Somewhere St,South Milford,Leeds,,LS25 5LF	0122 554 55	0122 554 54	North East	Prospect	No
FGL001	F G Landscape & Design	189 Sussex Rd,,Norwich,Norfolk,NR32 4HG	01603 3545	01603 3547		Active	No
FGL00101	F G Landscape & Design	Unit23B, Cleve Avenue,Waverton,Matlock,Derbyshire,DE4 3BD	01629 768 9	01629 823 2		Active	No
GRA001	Graham Electronics	150, Miller St,,Glasgow,Scotland,G1 1EA	0141 373 28	0141 383 27		Active	No
HAU001	Hausser GMBH	Nordring Str 98,5270 Braunschweig,Germany,,	00 49 531 3	00 49 531 3		Active	No

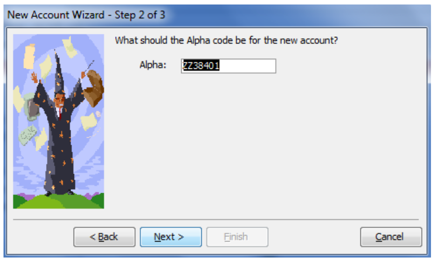
3. Then click on the  button (to the left of the Links button) shown in the bottom left hand corner of the screen:



4. Select Delivery / Site and click the Next button:

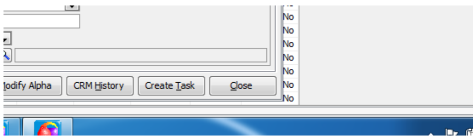


5. The Alpha code will automatically be populated, leave this as it is, and click the Next button.



6. Enter the Delivery / Site name and address and click the **Finish** button:

7. Then click on the Close button, shown in the bottom right hand corner of the screen:

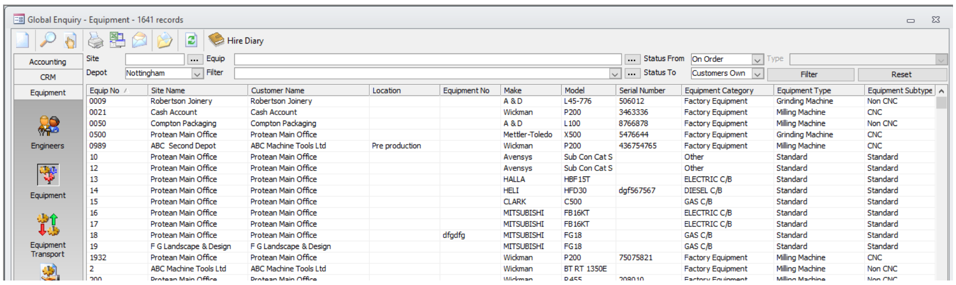


Equipment Records

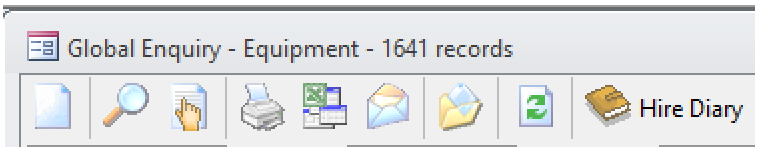
The Equipment register enables you to create and maintain a register of Equipment, including: Make & Model; Serial No; Site Location; Category, Type & Sub-Type; unlimited user-defined 'Attributes'; Financial Information; Servicing Details; Warranty details, Job history & other links.

To view a list of Equipment Records in the Protean system, click on the Equipment Global Enquiry icon: 

The system will then display a screen similar to the one shown below:



Every global enquiry has common buttons at the top left, which are also available by right clicking the mouse button within the middle of the global enquiry.



- **Create:** Used to create a new item.
- **View:** Drills into the record selected.
- **Pick:** Used when a global enquiry is bought up within another record.
- **Print / Export / Send:** Used to send the list to Printer / Excel / Email.
- **Reports:** Provides a shortcut to the reports for this module of Protean.
- **Refresh**: Refrehses the list displayed (Can be set to happen automatically).
- **Hire Diary:** If you are using the Hire Module of Protean, by pressing this button, you would then see the Hire Diary and the availablity of the equipment records displayed in the Global Enquiry screen.

General Tab:

This screen displays information such as the Equipment Number, Make, Model, Serial Number and Status.

Note: Some status options cannot be selected when an item of equipment is first setup. For example, you can't change For Hire to On Hire, or use Reserve or Inspect, as these are system generated through completion of other system procedures.

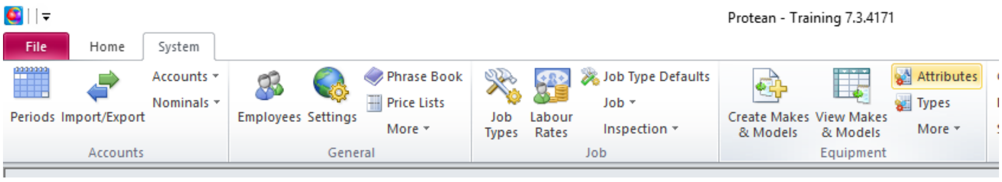
- **Retired:** This would be for equipment owned by your Company, which have now been scrapped.
- **Returned:** System generated when equipment has been sent back to supplier (returns note).
- **On Order:** Is on order with the supplier (purchase order).
- **Entry:** Initial status when first entered into system i.e. new item of equipment. Can be changed by users to Customers Own, Rental, Stock (only if **'Allow Equipment Status Change to Stock**' setting is set to **Yes**), Cross Hire or Sold.
- **Stock:** This item has been purchased by your Company, by raising a Purchase Order and booking it in.
- **On Sales Order:** This item is currently on a Sales Order.

- **For Hire:** This item is available for Hire. This is done by firstly having the equipment at a Status of Stock and then using the Financial Tab to capitalise the equipment record (More details on how to do this, are contained in the Hire User Guide).
- **Reserve:** Hire equipment that has been entered onto a Hire Contract, but hasn't yet been dispatched to the Customer.
- **On Hire:** The equipment is currently on hire with a customer of yours.
- **Inspect:** The equipment has been collected, but is awaiting inspection before becoming available for re-hire.
- **Cross Hire:** Equipment is not owned, but has been loaned from outside the business to fulfil a customer's requirement (3rd party hire).
- **Sold:** This is a stock item that has been sold.
- **Rental:** Long term contract hire, customer is purchasing via a finance company (lease, HP).
- **Customers Own:** This equipment is owned by the customer (Also used if an equipment record is sold to a customer, without a warranty).
- **Customers Retired: E**quipment is owned by the customer and is now retired from service.

<u>Attributes Tab:</u>
Equipment Attributes allow you to store additional information about an item of Equipment. They are completely user-defined, allowing you to hold as much or as little information as you wish about any equipment record on Protean. There are various 'Types' of Attribute that essentially govern in what form the information is held. These Types are Numeric, Text, Yes/No, List & Date.

Each Attribute can also be Categorised (again using user-defined Categories), to enable you to control long lists of information.

They are setup by clicking on the **System Tab ¦ Equipment ¦ Attributes**:



For example:
You have an Attribute called "No of Wheels". This would be a Numeric or List Type (depending how many possible values there were). A customer calls and wishes to hire some equipment from you. He does not mind what Make or Model it is but it must have 3 wheels. Using the Advanced Query you could ask Protean to show you any equipment that was available for hire and that had 3 wheels.

- **Printing:** Attributes can be printed on Equipment Despatch Notes, Sales Invoices, Hire Despatch & Collection Notes, and Hire Contracts.

- **Searching:** Using the Advanced Query option in Global Enquiry you can also search on Attributes.

- **Time Saving:** To save you time in setting up the Attributes for each individual item of equipment the system allows you to set up default Attributes, at the Make & Model level, which can automatically copy down to the Equipment Record screen when you create new equipment.

Attachments Tab:
This screen can be used to link two, or more items of Equipment together.

For example: You may wish to attach a Mast to a Truck, therefore the Truck would exist as an equipment record and so would the Mast. Once Equipment records are attached in this way, then if the primary item is placed on a Sales Order or Hire Contract, for example, its 'attachments' will come with it.

Financial Tab:
This screen will display various financial fields of information, such as Current Valuation, Depreciation, Insurance Value and Budgeting Information.

Servicing Tab:
This screen will display a list of all the Service Types that have been setup on your system, which have then been selected for the equipment record.

For each Service Type in the list, you need to check and amend the Interval between services (in months, weeks or meter units depending on the selection made on the Service Type itself) and the Next Due Date (when you want the servicing to begin). Optionally you can also enter a Last Done Date, and a Meter Reading (this is especially important if you are carrying out usage-based servicing).

You can also enter a list, or kit, of Parts used on that services of that type. To do this click the 'Parts' button at the bottom of the Servicing Tab.

If this is used, when service jobs are raised (automatically or manually), the system will create Job Stock Issues for these Parts.

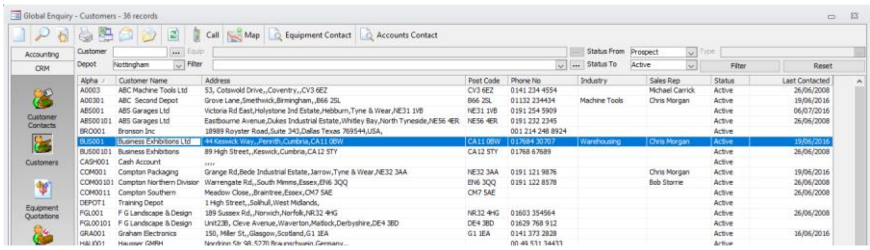
Other Tab:
This screen will display information depending upon what processes have been used with the equipment record. For example, if the equipment was purchased using a Purchase Order, then details of this transaction would be displayed in here. Additional information can be added, such as Warranty information if required.

Memo Tab:
This screen can be used to enter, view or amend Pop Up notes, Internal Notes and Customer Web Notes as required.

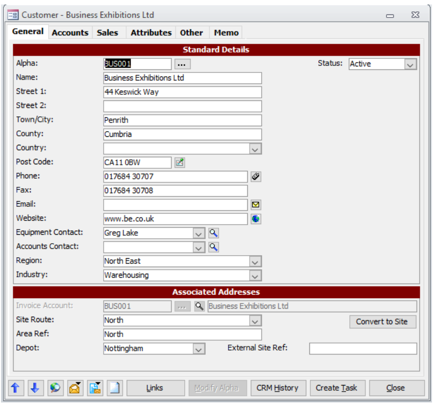
The Links Button

On Customer, Supplier & Equipment records, there is an extremely useful option which allows a user to view various different areas of the system whist still in the selected record.

To use the Links button, search for the record required (Customer, Supplier or Equipment):



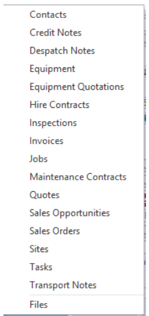
Select the record required:



Click on the 

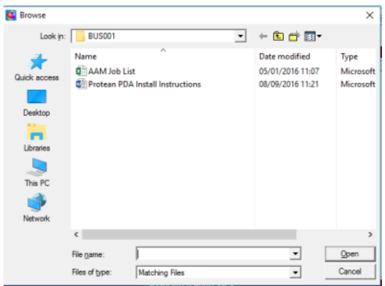
button shown at the bottom of the screen.

Depending on which record you've selected, the system will then display a menu similar to the one shown:



By clicking on each option, a user can view details of other areas of the system where the record is used.

Adding Files to Customer Records:



Clicking the **Links** button on either the Customer Screen and then selecting the '**Files**' option, will display either a document for the Customer or a browse window showing the contents of a folder with the same folder name of the customer:

You can store any number of different files, of any type, with any names. Simply save them all into a folder called, for example, BUS001 (this being the Customer Alpha Code number) and ensure this folder is located in the same location as entered in **System ¦ General ¦ Settings ¦ Files Directory - Customer**.

Equipment Records:
This can also be done for Equipment records. For these types of Files, they would firstly need to be saved into a folder called, for example, 100092 (this being the Equipment Number) and ensure this folder is located in the same location as entered in **System ¦ General ¦ Settings ¦ File Directory – Equipment.**

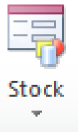
Supplier Records:
This can also be done for Supplier records. For these types of Files, they would firstly need to be saved into a folder called, for example, MUL001 (this being the Supplier Alpha Code Number) and ensure this folder is located in the same location as entered in **System ¦ General ¦ Settings ¦ File Directory – Supplier.**

Part Stock Records:
This can also be done for Part Stock records. For these types of Files, they would firstly need to be saved into a folder called, for example, ADF/456444 (this being the Part Stock Record Number) and ensure this folder is located in the same location as entered in **System ¦ General ¦ Settings ¦ File Directory – Parts.**

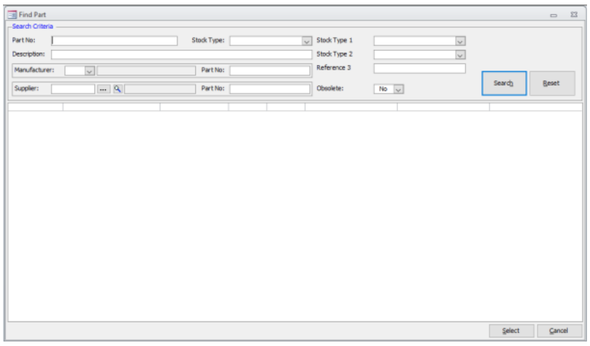
Searching for an existing Stock Record

There is no Global Enquiry screen for stock, instead there is a Find Part screen, which allows a user to enter some search criteria and then search for the part record required.

To access this screen, click on the Stock Icon shown at the top of the Home Tab:



The system will then display the Find Part screen:



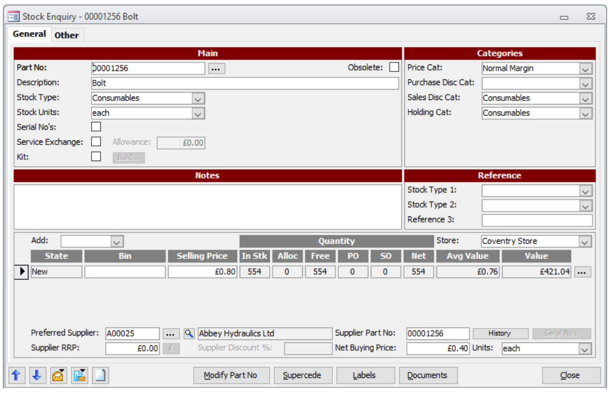
1. Enter the required text into the search fields (using a combination of fields if required) and click Search.

    a. **Part No:** Search part of, or all of, a part number.
    b. **Stock Type:** Search the stock type (user-defined designation used for reporting/enquiries/tax status).
    c. **Description:** Search part of, or all of, part description.
    d. **References 1, 2 & 3**: User-defined reference fields.
    e. **Manufacturer/Supplier part number:** Use if the Manufacturer or Supplier have their own part number that isn't used internally by the client.
    f. **Obsolete:** Search for active/obsolete stock. Can choose blank option for 'all'.

2. Double-click on the required Stock record:

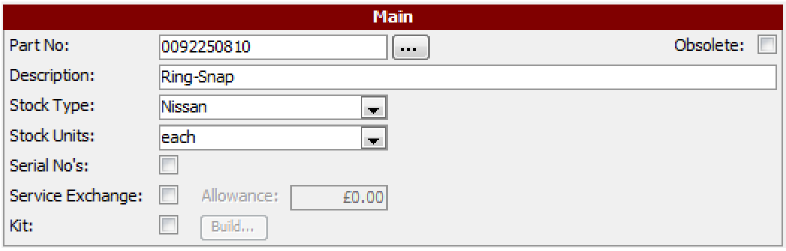
Part No	SS	Description	Manufacturer's Part No	Supplier's Part No	Free Stock	Net Stock
0.060.00	N	Battery Hydrometer		HG097970	1	1
0.236.00	N	Fuse Carrier 6 Way		564-11	0	0
0.335.56	N	Solinoid		76-4343	0	0
0.377.00	N	Fuse Holder		DFD678	0	0
0.377.80	N	Fuse		0.377.80	0	0
0.450126.009	N	Fuel Primer (5006 Filter Fits)	0.450126.009	0.450126.009	0	0
0.727.40	N	Pre Heat Relay		9797-08	1	1
0.72740	N	Relay		0.72740	0	0

3. After selecting the part record, the system will then display the Stock Enquiry screen:



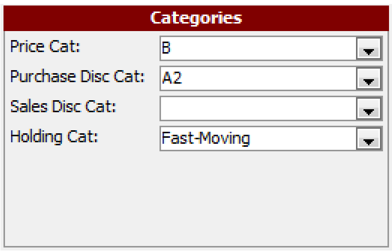
General Tab

Main section:



- **Part No** must be unique. Can include letters, numbers, spaces, special characters. Limited to 50 characters.
- **Description** can be up to 255 characters in length.
- **Stock type** is a user-definable field, and is used to sub-categorise parts and for VAT rate. Examples here are Parts, Filters, Tyre's etc. (Used in the Stock Take and Price Uplift routines and can also be used on Job Types to control chargeability levels).
- **Stock units** are the default unit when stocking/selling/issuing the part (e.g. each, cm, litre), these are customisable.
- **Serial No's** is ticked if serial numbers are required when booking in or selling this part (often for more expensive items that need to be tracked) – can only be activated when out of stock with no prior transaction history (i.e. when part is first created).
- **Service Exchange** is used to define the value of the rebate that may be received by the customer in exchange for a worn part. This value will be deducted from the sell price of the part, rather than 'added on' to it.
- **Kit** will indicate that the part is a kit, built up of other part numbers as defined in the 'Build…' menu.
- **Obsolete** will prevent part from being purchased/ordered. (If the part has any equivalences, marking it as obsolete, will use them to replace the old part in any existing kit builds. Also, if this part has been superceded, will be marked as Obsolete).

Categories Section:

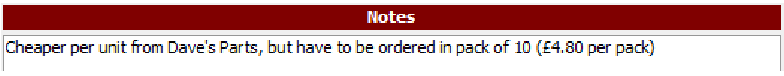


- **Price Cat** is user-definable and is used as a figure on which to base discounts on sales orders, price lists and stock re pricing process (Category has an uplift % to be used for products of this category).
- **Purchase Disc Cat** is user-definable, and is entered against a supplier record to define the discount received from Suppliers RRP on certain part types (Stock/VOR).
- **Sales Disc Cat** is an older version of Price Cat. Not generally used for newer clients.
- **Holding Cat** is related to the ordering of parts, and is user-definable. Primarily, the Stock Holding Category allows you to specify how many days' worth of stock you wish to hold for any given Part or group of Parts. It is

used in the Stock Reordering system as part of the calculation when determining how many of each item to order from you Suppliers.
May be based on movement, value etc. to define the number of days' of parts to hold in stock (Better than Min/Max levels on Parts themselves).

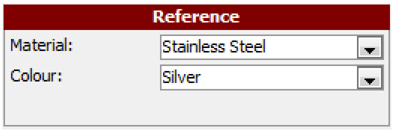
Notes Section:

- Used for internal reference purposes. Could be put onto reports if requested.

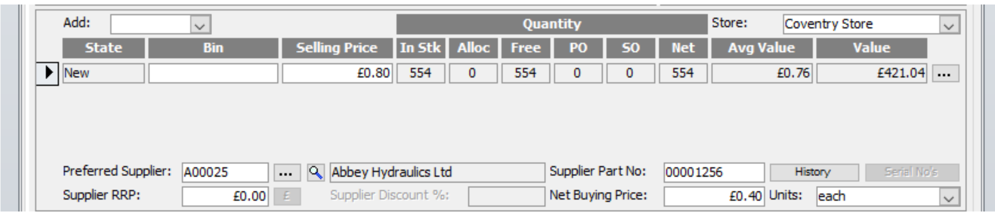


References Section:

- User-defined references (**System ¦ General ¦ More ¦ User References ¦ Stock**), can print on documentation or be used for enquiries/reports.



Stock section:



- **Add:** Used to add a new State level.
- **Store**: Used to select the store for which you want to see stock details.
- **State:** Used to add multiple instances of the same part number that differ depending on the state of the part (i.e. new/used/reconditioned/quarantined).

Note: The Stock States refer to the condition of the Stock Part. There are four 'States' available in Protean:

New:	The most prevalent 'State'. Items bought in new from a Supplier.
Refurb:	Items which have been reconditioned.
Used:	Second-Hand Items.
Quant:	Service Exchange Items.

Each Part No on Protean can exist in any or all of the four Stock States. This allows you to hold a stock of, for example, 35 new items and 10 Used under the same Part Number. The different Stock States are shown as distinct lines on the Stock Enquiry screen and elsewhere in the system by a letter code after the Part No.
(The Stock State designation appears on all Stock Reports and all Order Processing screens).

- **Bin location** can be entered per Store/State combination (Shown on Picking & Dispatch Notes and used in Stock Take routine).
- **Selling Price** is the default sales unit price normally charged for this part (Defaults onto Sales Orders and Jobs).

- **Quantities:**

  In Stock: Shows the amount of stock that should be within stores currently, including allocated (Use Stock Adjustment routine to enter initial stock quantity when setting up new part).

  Allocated: Will show how many are reserved.

  Free: Will show how many are currently physically available for issue.

  PO: Will show how many are on an active purchase order.

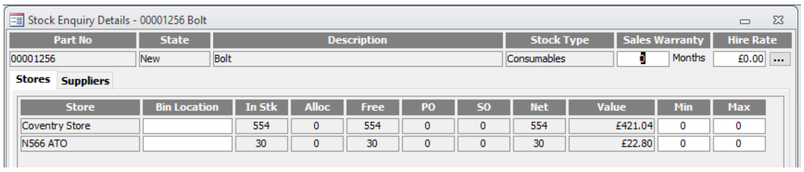
  SO: Will show how many are placed on a job, but are yet to be allocated. This status is seldom-used.

  Net: Will show how many are potentially available (In Stk + PO - Alloc - SO).

  Average value: Is the average cost price of the part (excluding parts purchase ordered for a specific job).

  Value: Is the total in stock value for the store/state.

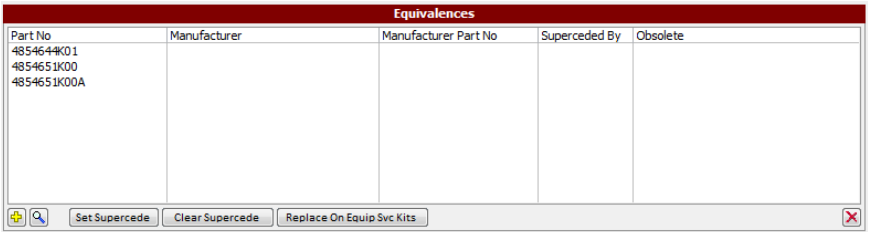
The ... button takes the user to the Stock Enquiry Details screen. This shows how much you have of that part number in that stock state across all stores.



- **Preferred Supplier** is where the default supplier account for this part record is added. Each time this part is booked in, the supplier code will default to the entry within here.
- **Supplier Part No, Supplier RRP, Net Buying Price and Units** is where the supplier-specific part information can be keyed for the default supplier.
- **History** shows details of the transaction history for the part.
- **Serial No's** will display the serial numbers of the available parts.
- **Net Buying Price** will display when raising a P/O.
- **Units** will display when raising a P/O. (Example: Net buying Price: £50, Units: Packs of 10 would mean that the total value on the P/O for 1 pack would be £500).

Other Tab:

- **Equivalences** allow alternative (equivalent) part numbers to be assigned. If the part is out of stock, the system will notify the user if equivalencies exist (Use the + icon to add).
- It is possible to supercede to an equivalent part, by using the **Set Supercede** button (Must have added Equivalence first).
- The **Replace On Equip Svc Kits** button, can be used to update parts attached to equipment to the updated part number.



- **Manufacturer Part No** allows the manufacturer's own part number to be defined (Set up in System > Stock > Manufacturers).

- **Make/Model** is used to define what equipment type is used if the selected part is ever converted into an item of equipment.

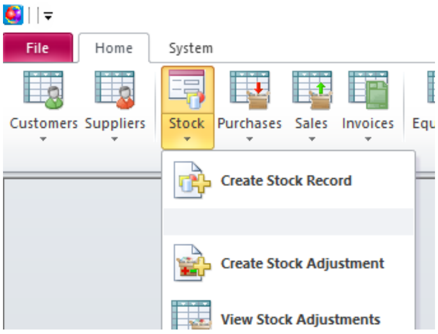
Buttons:

Along the bottom of the screen, are a number of icons and buttons as follows:

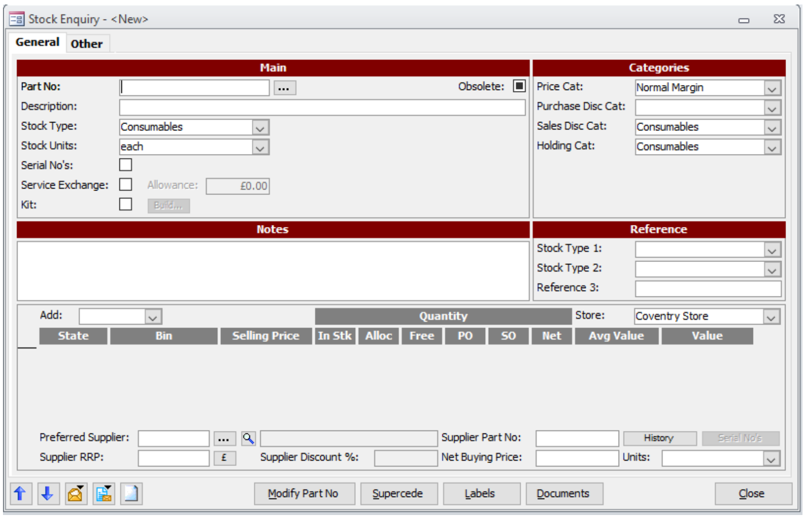
- **Up and Down arrows** are used to skip through the 'search results' (i.e. that are in Find Part screen).
- **Messaging icon** is used for messaging internally, or for email (Outlook).
- **Reports icon** is used to access stock reports.
- **Create New** will create a new part.
- **Modify Part No** will allow the displayed part number to be amended.
- **Supercede** will allow a supersession to be created. This will mark the displayed part as obsolete.
- **Labels** will allow a label to be printed for the displayed part. This function is more commonly used when booking in parts.
- **Documents** will allow images and documents to be attached to the part. Files should be held on server. Files should be held in \Stock\XXXXX where XXXXX is the stock number. XXXXX can be a directory containing multiple files, or an individual filename (including file extension).

Creating Stock Records

To create a new Stock record, click on the drop down arrow below the **Stock Icon** and select **Create Stock Record:**



The system will then display a blank Stock Enquiry screen as shown below:



Note: There are 3 mandatory fields when creating new stock records, which are Part Number, Description and Stock Type. However, using the information found earlier in this guide, complete as much information as required.

Note: In order to get a stock balance onto the stock record, this can be done by either creating a Stock Adjustment or a quantity will be added, once a Purchase Order has been created and then booked in for the stock record concerned.

Searching for an existing Maintenance Contract

To view a list of current Maintenance Contracts, click on the Maintenance Global Enquiry icon 

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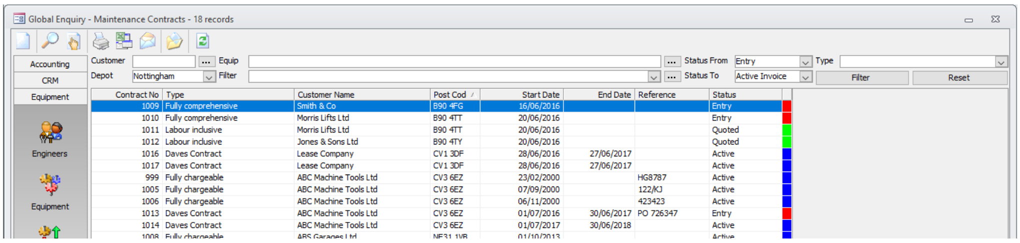
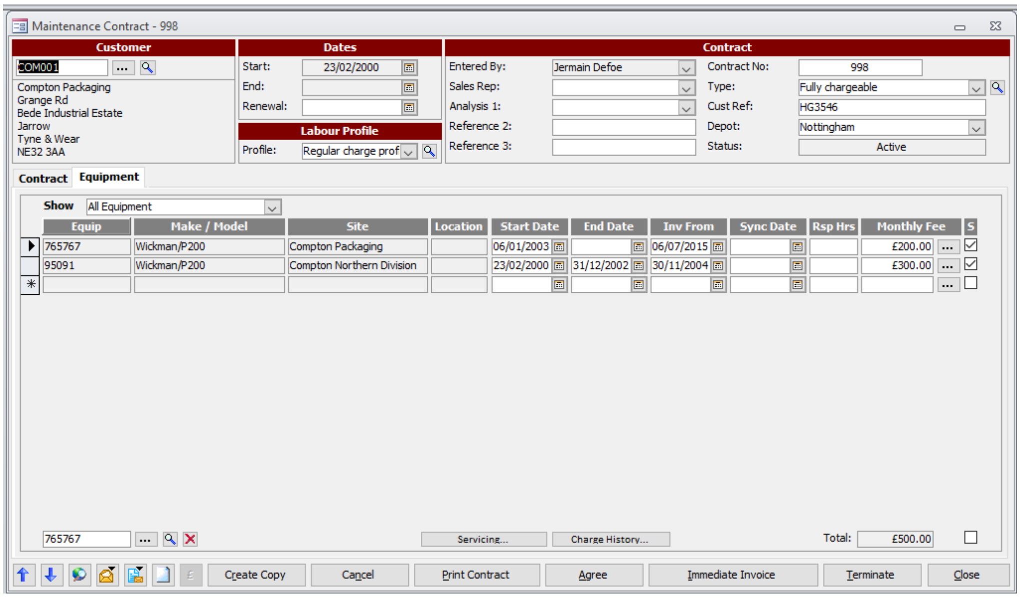
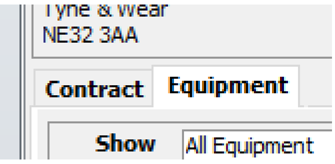
The system will then display a screen similar to the one shown below:



To then view the details of the existing Maintenance Contract, double click on the record and the system will display a screen similar to the one shown below:



This screen does have two Tabs, which will display various fields of information regarding the Maintenance Contract selected:

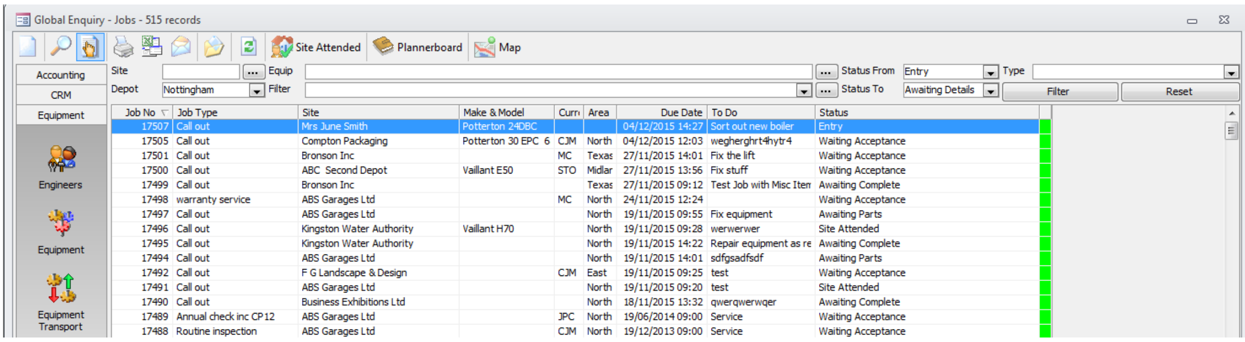


Searching for an existing Job

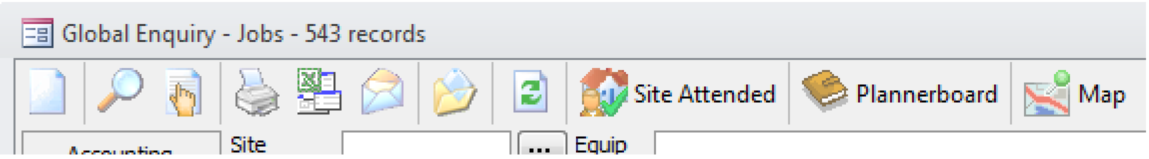
To view a list of Jobs, click on the Jobs Global Enquiry icon 

.

The system will then display a screen similar to the one shown below:



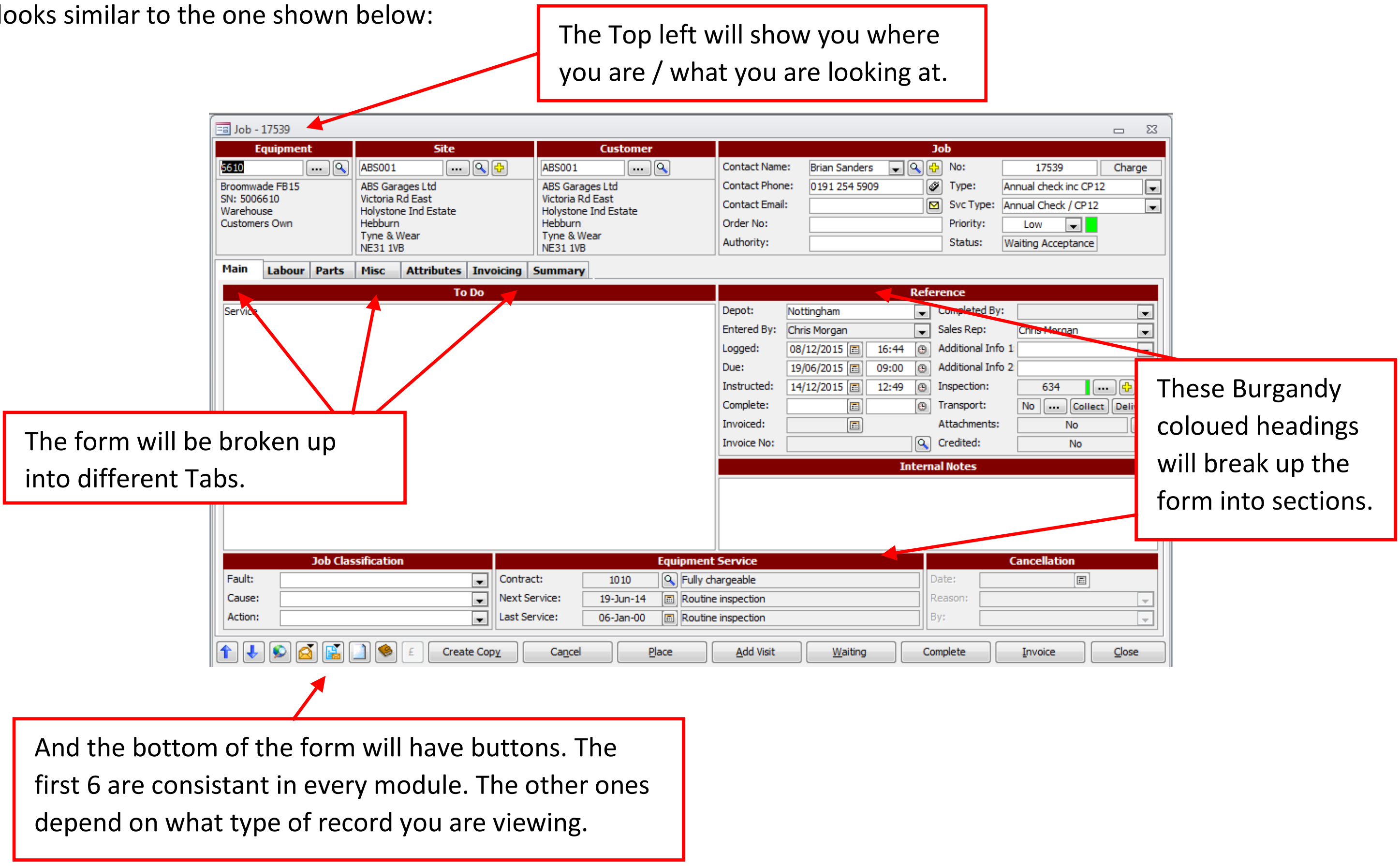
Every global enquiry has common buttons at the top left, which are also available by right clicking on within the middle of the global enquiry.



- **Create:** Used to create a new Job.
- **View:** Drills into the record selected.
- **Pick:** Used when a global enquiry is bought up within another record.
- **Print / Export / Send:** Used to send the list to Printer / Excel / Email.
- **Reports:** Provides a shortcut to the reports for this module of Protean.
- **Refresh**: Refrehses the list displayed (Can be set to happen automatically).
- **Site Attended:** This allows a user to quickly update all of the visits on a Job, without the need to access each one individually. Once a job is selected, any visits on it that have a status of “Allocated”, will be updated to a status of “Visited”. This process will also update the overall status of the Job “Site Attended”.
- **Plannerboard:** Provides a shortcut to the Plannerboard screen.
- **Map:** If a site is using MicroSoft MapPoint, this will then display a screen showing the location of each Job displayed in the Global Enquiry screen and their current status.

Accessing a Job:

To access a Job already created, simply double click on the Job required and the system will then display a screen which looks similar to the one shown below:



Show Previous Record: Allows access to the Job record that is above the record selected, in the Global screen.

Show Next Record: Allows access to the Job record that is below the record selected in the Global screen.

Show Jobs List: Returns the user to the Global screen.

Create a Message: Allows a user to create either an Internal Protean message that can be sent to another user on the system, an external email or a Task within the CRM area of the system.

Output a Job Report: Allows a user to print, view, email, export or fax either an Estimate, Quotation, Work Sheet or Invoice based on the information entered on the Job (An invoice can only be produced if the Job has been invoiced).

Create a New Job: Allows a user to create a new Job.

Engineer Plannerboard: A quick shortcut to the Engineers Plannerboard, particulary useful when creating new Jobs.

Other Common Features:

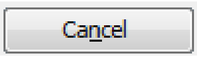
These (...) buttons will open up a Search screen.

A Magnifying Glass will Drill into a record and move you to that record in Protean.

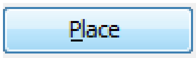
Other Buttons:

Along the bottom of the screen are a number of buttons, which are as follows:

Allows a user to create a copy of the job they're currently accessing. This is particulary useful when dealing with credit notes.

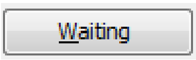


Depending upon the status of the Job, this allows a user to cancel it. A canellation date and reason must be selected.



Allows a user to alter the status of a Job from Entry to Unallocated.

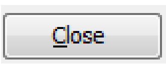
Allows a user to add further Visits in the Labour Tab.



Allows a user to alter the Status of the Job to Awaiting Parts. This happens automatically if a Purchase Order is creating from within the Job itself.

Once all entries have been made on the Job, a user must then click on this button before being able to invoice it. The system will then validate the Job to check everything is in order.

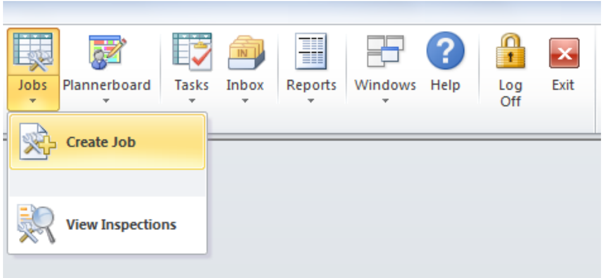
After the Complete button has been clicked and possibly Authorised (Depending on the System Settings), this is used to then either view a Preview Invoice or generate the Full Invoice with a Tax Point date as required.



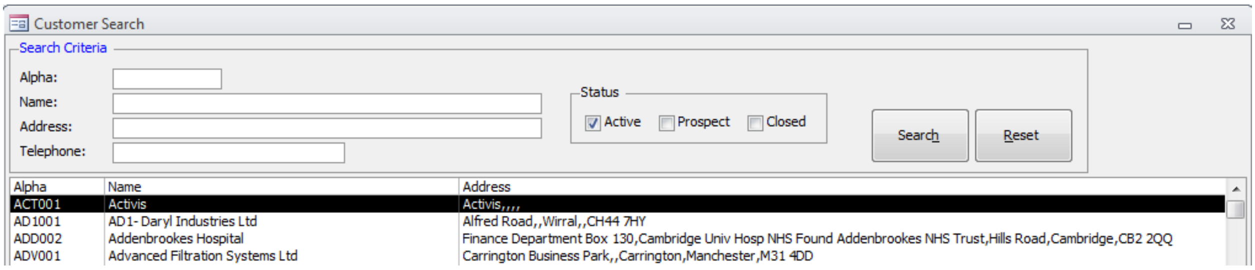
This button is used to close the Job screen down and will save any additions or changes made.

Creating Jobs

- To create a New Job, click **Jobs** and then **Create Job**:

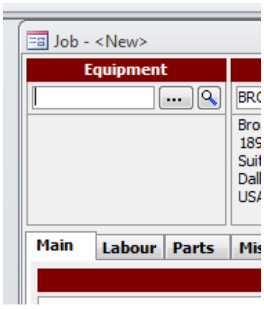


- Depending on how Protean is configured, you will be presented with a Customer Search form, an Equipment Search form or the Job form.
- In the Customer Search form, enter the required search criteria and click the Search button. Then double-click on the relevant item in the results list, to add the customer to the job.

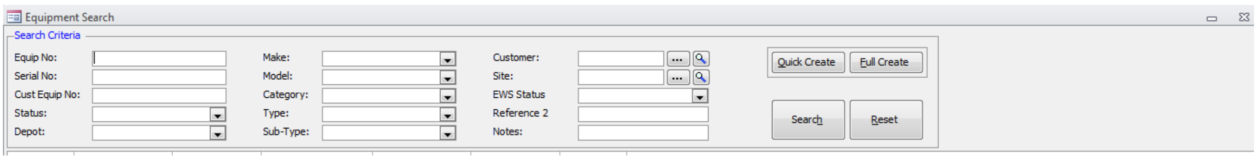


Note: *It is possible to create and complete a Job without an equipment record being entered. However, if the Job is an invoicing Job, then a customer is required before completion.*

- If you wish to select a piece of Equipment, click the … button to the right of the Equipment field in the top left hand corner of the screen, to access the Equipment Search form:



- In the Equipment Search form, enter the required search criteria and click the Search button, double-click on the relevant item in the results list to add the equipment to the job.



Note: *If the piece of equipment isn't displayed, then you can click on the* ***Full Create*** *button to create the equipment record if required. Once you have selected a Site and Customer and optionally an Equipment record, a Job No will then be allocated.*

Job Section

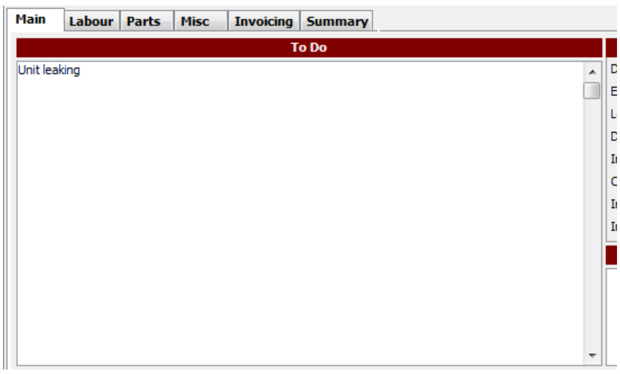
- **Contact Name:** Defaults from the Equipment record. User can enter a Contact Name or select an existing Contact from the drop-down list. If you enter a contact you will be prompted with the option to add the contact.

Note: *If you select "No" on this prompt, the job record will hold the contact details but the contact will not be linked to the Site record. If you select "Yes" on this prompt you will then be presented with the Contact form. On this form you can add additional information such as Job Title, telephone number and email address etc).*

- **Contact Phone:** Defaults from Equipment record, can be amended if required.
- **Contact Email:** Defaults from Equipment record, can be amended if required.
- **Order No:** Enter an Order Number if required. Depending on the settings on the Customer Record, the system may remind you that an order number is required.
- **Authority:** Enter the name of an additional contact in the Authority field, if applicable.
- **Type:** The system will automatically put your default Job Type in for you. If it is different, select an alternative Job Type from the drop down list.
- **Chargeable / Non Chargeable:** Pre-determined by the Job Type selected in the previous field.
- **Priority:** Amend the priority of the Job if required (Low – Green, Medium – Amber, High – Red). This can be seen in the Jobs Global Enquiry screen.
- **Status:** Displays the current status of the Job, defaults to "Unallocated".

Main Tab

- Enter the details reported by the customer into the "To Do" field.



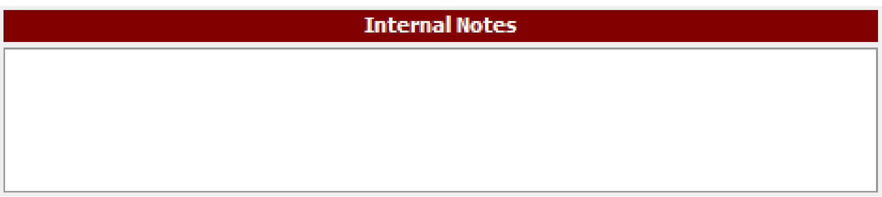
- Any details you type here will print on the Job Sheet/Work Sheet for the engineer.

Reference Section

- **Depot:** Defaults to the Depot attached to the user who is raising the Job. Can be amended if required.
- **Entered by:** Defaults to the name of the user who raised the Job. Can’t be amended.
- **Logged:** Displays the date and time the job was first created/logged.
- **Due:** Displays the date and time the job should be attended, job type category needs to be ‘call-out’ (An exception would be when the ‘Update Service Jobs’ process is run). Default response time can be set in System > General-Settings > Default response time or in a maintenance contract. Can also be entered manually if required.
- **Instructed:** Displays the Date and time the job is allocated to an engineer.
- **Complete:** Displays the date and time the job is completed.
- **Invoiced:** Displays the date on which the Job was invoiced.
- **Invoice No:** Displays the invoice number, click on the magnifying glass icon to view the invoice itself.
- **Completed By:** Displays the name of the user who completed the Job.
- **Sales Rep:** Defaults in, can’t be amended here.
- **Reference 1:** Additional user defined field for the recording of additional information as required.
- **Reference 2:** Additional user defined field for the recording of additional information as required.
- **Inspection:** An inspection sheet can be ‘attached’ to a job, shows the inspection no. in the first field, ‘•••’ goes to sheet details.
- **Transport:** If ‘yes’, ‘•••’ displays the global enquiry screen for Equipment Transport, for that customer.
- **Collect:** This raises a request for transport from the customer site to the workshop.
- **Deliver:** This raises a request for transport to the workshop to the customer site.
- **Attachments:** Allows a user to attach any documents for the Job, which can be viewed on the Engineers PDA’s.
- **Credited:** If a credit note has been raised against the Invoiced Job, then this field will say “Yes” and the credit note can be viewed by clicking on the magnifying glass icon.

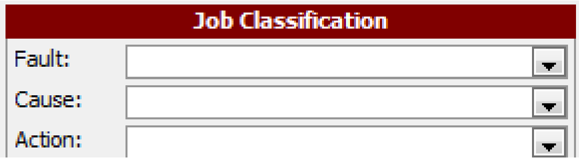
Internal Notes Section

Notes can be entered into this section, which just display on screen and don’t print off on any documentation.



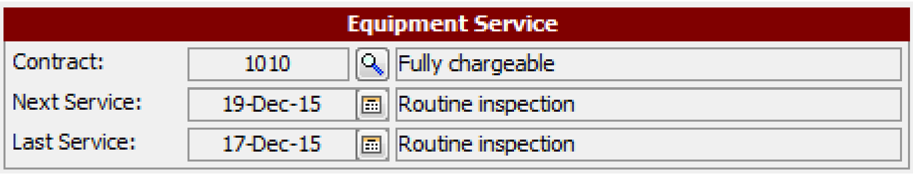
Job Classification Section

Faults, Causes and Actions, are user definable and are useful when reporting on reason for call-outs/breakdowns as they help keep the information entered consistent (They are setup in System > Job > Faults, Causes & Actions).



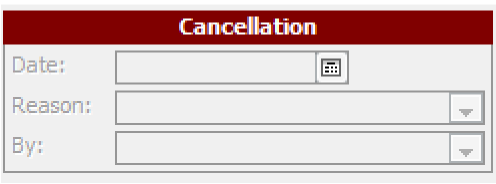
- **Faults:** Use the drop down icon to select if required. Text will appear in the ‘To Do’ field, if blank and text details have been set up against a fault.
- **Cause:** Use the drop down icon to select if required.
- **Actions:** Use the drop down icon to select if required.

Equipment Service Section



- **Contract:** If the equipment is on a maintenance contract, the number of the contract will show here, the magnifying glass icon will display that contract details.
- **Next service:** Date per service schedule on equipment.
- **Last service:** Date the last service was completed.

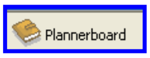
Cancellation Section

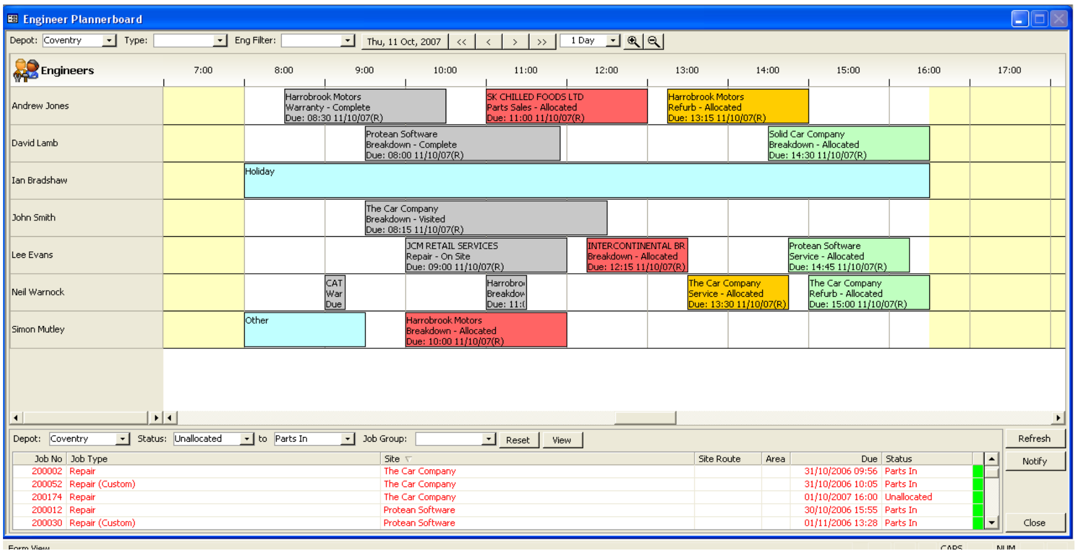


If the Job has been cancelled, this section will display the following details:

- **Date:** The date on which the Job was cancelled.
- **Reason:** The reason selected when the Job was cancelled.
- **By:** Will display the name of the User who cancelled the Job.

Allocating an Engineer using the Planner Board

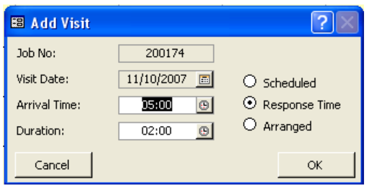
- The Planner Board form allows you to plan Engineer visits, move allocations and add unavailable time and is accessible from where ever you see the Planner board icon: 



- The top half of the Planner board will display a list of Engineers together with details of Jobs Completed, Due, and Overdue. For Each Job the Planner board will display The Customer, Job Type, Status and Time Due. The board will display other time for Engineers such as Holidays & Sicknesses.
- The bottom section of the Planner board will display a list of outstanding jobs, similar to the main Jobs Global Enquiry screen.

Allocating an Engineer

1. Locate the Job from the list of outstanding jobs in the bottom half of the Planner board.
2. **Drag and Drop** the Job against the engineer. You will then be prompted to “Add Visit” where you can enter the proposed arrival time, then click ok. If the Arrival Time not known, simply accept the defaults and click ok. The time can be amended later on the job record.



Note:** To go to the Job Record, **Right Click** on the Job in the Planner board & select **View Job.

Job Colour Codes:

Red: Job Is Overdue.

Grey: Job has been completed.

Yellow: Job Due in less than 1 Hour (This time Due Setting can be amended in Settings).

Green: Future Jobs whereby “due Time” can still be met.

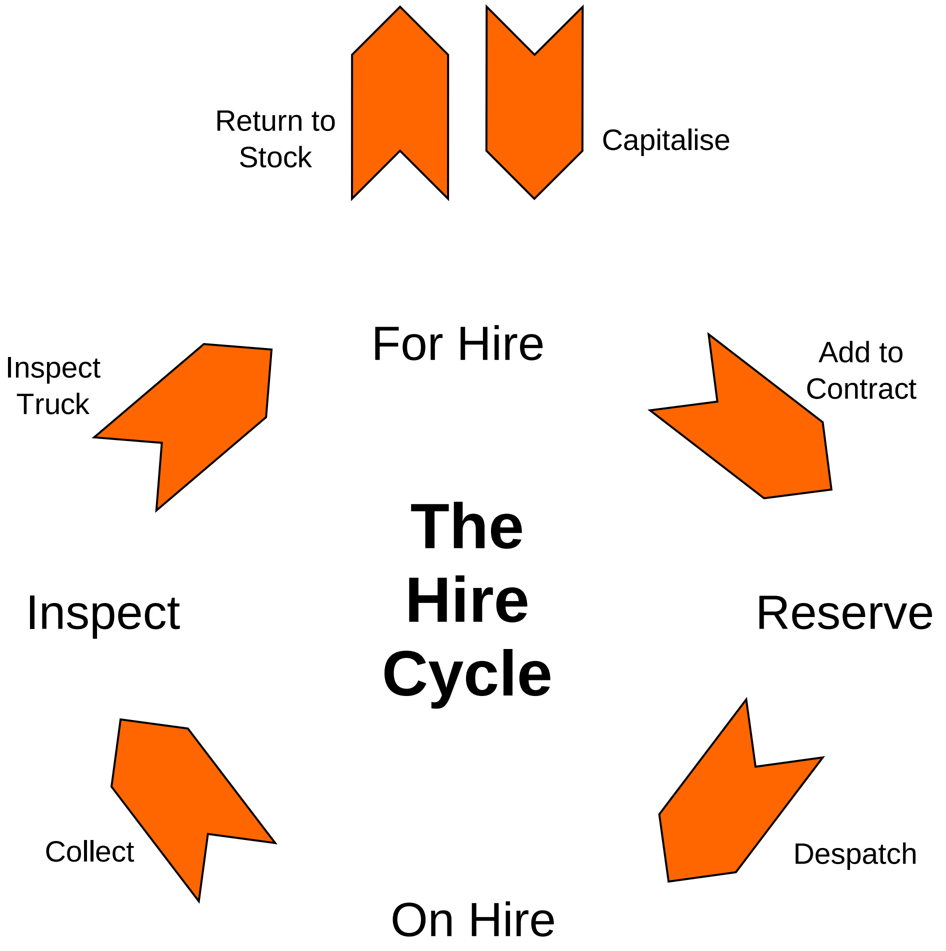
Blue: Engineer Unavailable (You can choose from 4 set reasons, Holiday, illness, Training & Other).

What are the different Job Status?

Status Name	Meaning
Entry:	The Job is being created but not yet saved.
Credit Hold:	The Customer is 'on-stop' and so the Job cannot be processed. The 'on-stop' facility is controlled by the Accounts Dept.
Order No Req:	This Customer has been flagged as requiring an order number for a Job but as yet this has not been entered on the Job.
Estimated:	An estimate has been printed for this Job.
Quoted:	A quote has been printed for this Job.
Unallocated:	The Job record has been saved but no engineer is yet allocated.
Allocated:	An engineer has been allocated to the Job.
Awaiting Parts:	There is a Stock Issue or Purchase Order (Parts or Misc) outstanding against the Job, or the 'Waiting' button has been pressed.
Parts In:	The parts that were ordered/requested have been booked in/issued.
Waiting Acceptance:	Primarily a PDA function. The Job details have been sent to an Engineer and we are awaiting a response to say he is attending.
En-Route:	Primarily a PDA function. The Engineer is currently travelling to site.
On Site:	Primarily a PDA function. The Engineer has arrived on site.
Site Attended:	The engineer has visited the site and the Job is now awaiting completion.
Further Work Req:	A PDA function. Further work has been identified by the Engineer on site and details have been entered via the PDA.
Awaiting Complete:	A PDA function. The Engineer has flagged his Job as complete on the PDA and it is now only awaiting confirmation by the Job Controller(s) at the office.
Awaiting Details:	The Job needs some further information before it can be completed.
Authorise Req:	The **Complete** button has been pressed once and you have chosen the option to have an authorisation stage in the completion process. It is awaiting another press of the 'complete' button by an authorised user.
Completed:	The Job is completed. If it is chargeable it can now be invoiced.
Invoiced:	The Job has been completed and invoiced
Batch Updated:	This Job has been updated to the accounts software.
Cancelled:	This Job has been cancelled.

The Hire Cycle

Below is a diagram which is intended to show the complete Hire process:



Searching for an existing Hire Contract

To view a list of current Hire Contracts, click on the Hire Global Enquiry icon 

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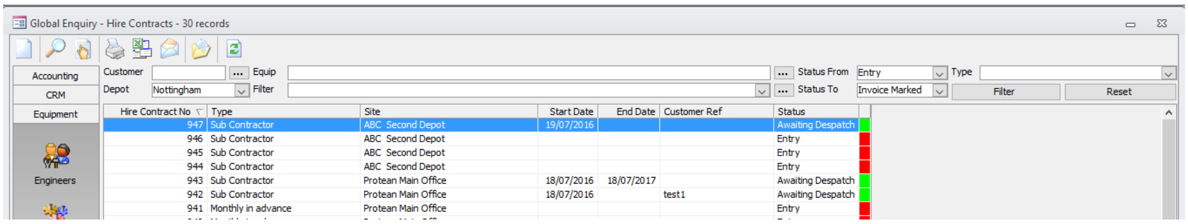
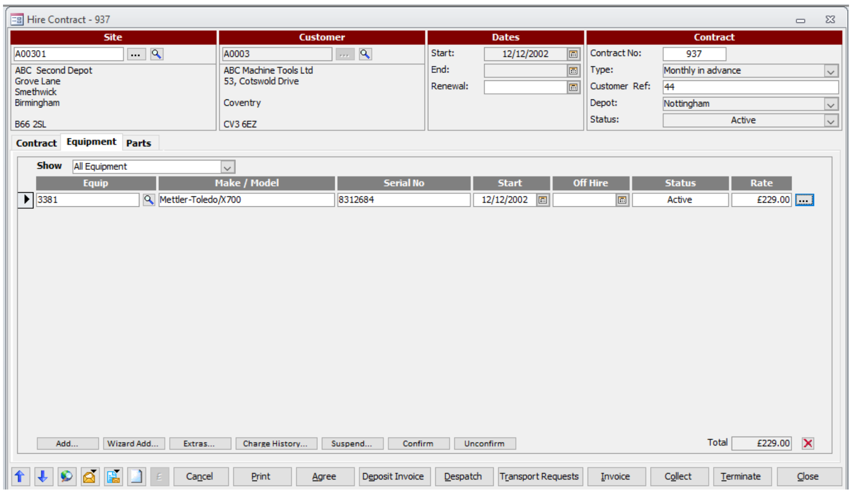
The system will then display a screen similar to the one shown below:



To then view the details of the existing Hire Contract, double click on the record and the system will display a screen similar to the one shown below:



Creating Hire Contracts

There are 3 main ways to create a New Hire Contract on the Protean system, which are as follows:

1. **The Main Contract screen:** When you need full control over all options and settings.
2. **The Quick On-Hire screen:** For creating simple Contracts, when time is at a premium.
3. **The Hire Contract Creation Wizard:** Step by step Contract creation for those that like a helping hand.

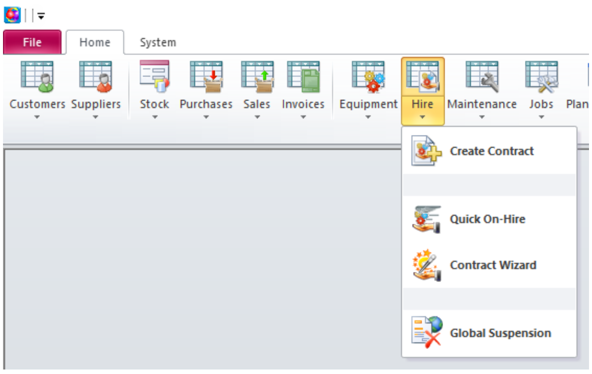
Using the Hire Contract Creation Wizard to create a Contract:

The Contract Creation Wizard is designed to guide the user through creating a new Hire Contract as smoothly and painlessly as possible. The Wizard will ask you set of very simple questions. The answers to these questions are used as the skeleton to create the Contract.

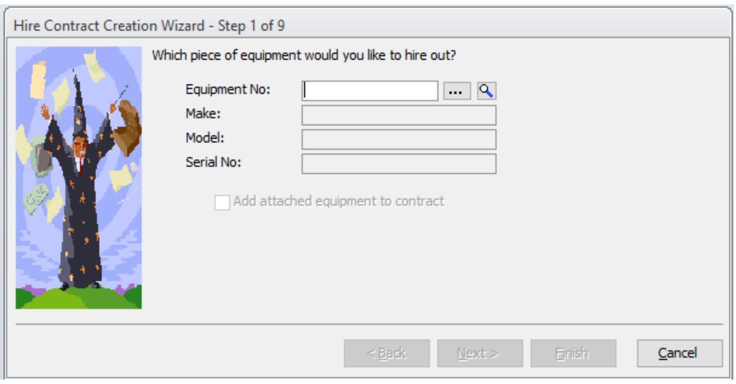
Some of the background detail will come from General Settings and the Hire Contract Type you select, although any Contracts created via the Wizard can quite simply be amended using the main Contract screen once created.

- You are only asked one question at a time on uncluttered screens.
- The Wizard will only allow you to move on from a question once a satisfactory answer has been given.
- If the questions does not need to be answered it will let you move on without answering.
- The 'navigation' buttons at the bottom of the Wizard will only become available if they are allowed in the circumstances.

To create a new Hire Contract using the Contract Wizard, click on the drop down arrow below the **Hire Icon** and select **Contract Wizard:**



The system will then display a screen as shown below:

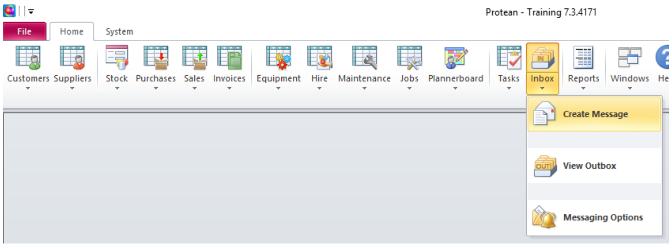


You then have to enter information as requested and then click on the Next button to work your way through the various screens as required.

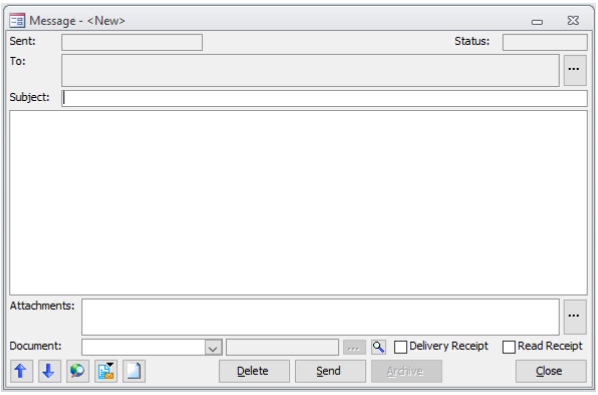
Internal Messages

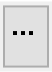
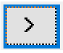
Protean has an internal messaging system, which allows email-like messages to be sent and received by users of the Protean system. Messages can be sent from the Protean desktop application to other user of that application or to engineers using mobile devices and vice versa.

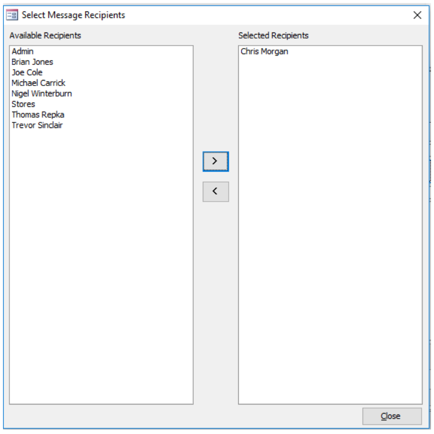
1. To send an internal message, click on the drop down arrow shown below the Inbox Icon and select Create Message:



2. A new internal message screen opens:

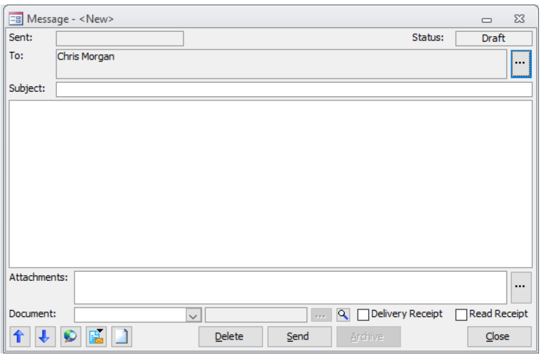


3. Click on the  button in the top right-hand corner, to access the list of potential recipients.
4. Highlight the name(s) of the users you wish to send this message to and use the  button to move them across into the **Selected Recipient** list:

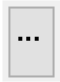


5. (If you select an incorrect recipient, use the  button to move a selected recipient back into the **Available Recipient** list. This list can also contain Recipient Groups as well, to allow to send messages to multiple contact more quickly).

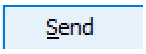
6. When you have selected all of the intended recipients, click on the **Close** button and you'll be returned to the main message screen:



- **Subject:** Enter the subject of your message.
- **Main Body of screen:** Enter the text to appear on the message.
- **Attachments:** If you wish to attach a file to this message then click on the button on the right-hand side of the Attachments field. A browse window opens allowing you to search your computer for the appropriate file to attach. Files of any type can be attached.



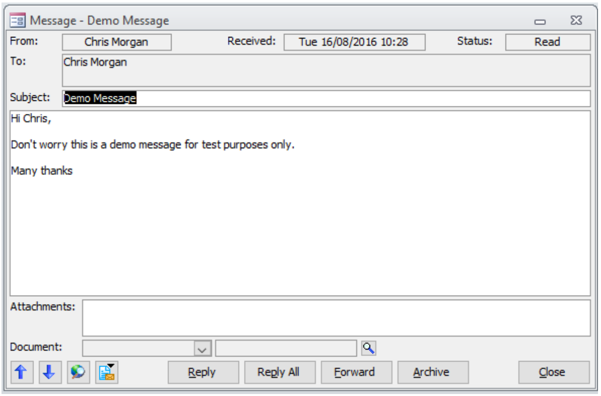
- **Document:** In this field you can also specify a document on Protean to link this message to. For example if the message refers to a particular Customer, or Job, or Purchase Order, you can link it to that screen so that the recipient is given a link to the relevant document when they receive your message.
- **Delivery Receipt:** Tick this box to receive a message when the message arrives in the recipient's inbox.
- **Read Receipt:** Tick this box to receive a message when they open your message.

Once all of the details of the message have been entered, click on the 

button.

Viewing Internal Messages:

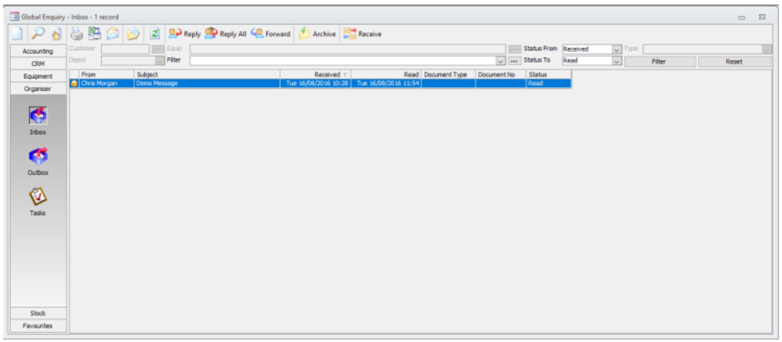
All internal messages that a user receives, will then appear on the users screen for them to view and deal with accordingly:



If the user who sent the internal message had either added an attachment or linked the message to a document, these can be quickly accessed by clicking on the appropriate button shown at the bottom of the screen.

Users can also view all of the messages they receive, by clicking on the Inbox icon:

The system will then display the list of received messages:



These can then be read, replied to, forwarded etc. as required.

Saving a received Internal Message:

Users can also use the 

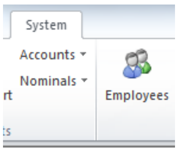
button to "save" the message and change the status of the message to Archived, so that it "hides" it from the main Messages Global Enquiry screen.

Archived messages can be read, by simply changing the status in the "Status From" field to Archived:

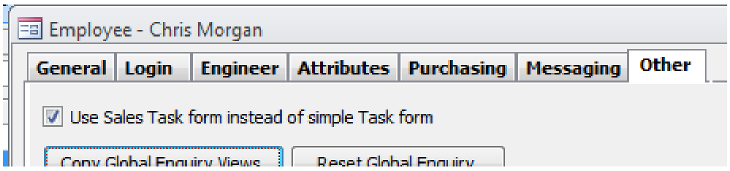
Tasks

When using Tasks on the Protean system, the first thing to decide is which Task form do you want to use. There are two task forms within Protean, the **Standard** Task form, and the **Sales** Task Form (see below).

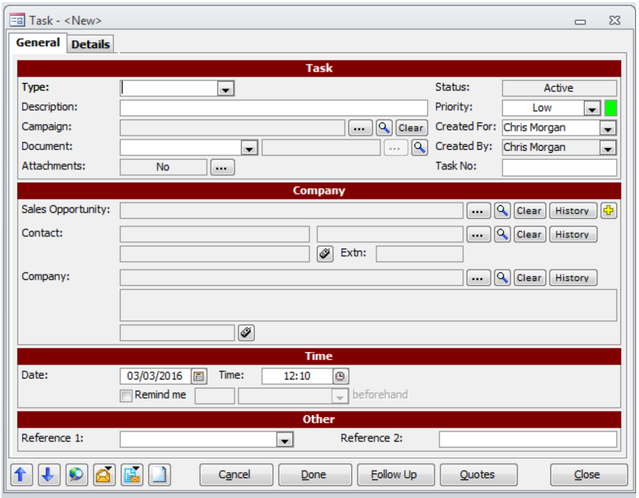
This is determined by your System setting for each individual Employee, by clicking on **System > Employees:**



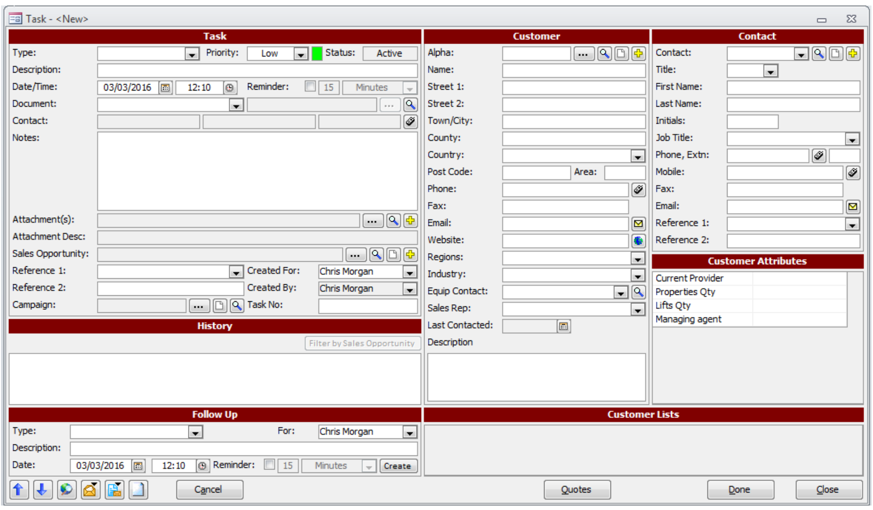
1. Then click on the Other Tab:



2. If you want to use the Simple Task Form, then don't tick the box. This will mean that the user will be presented with the Simple Task screen as shown below:

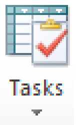


3. If you want the employee to use the Sales Task form, then tick the box. This will mean that the user will be presented with the Sales Task screen as shown below:

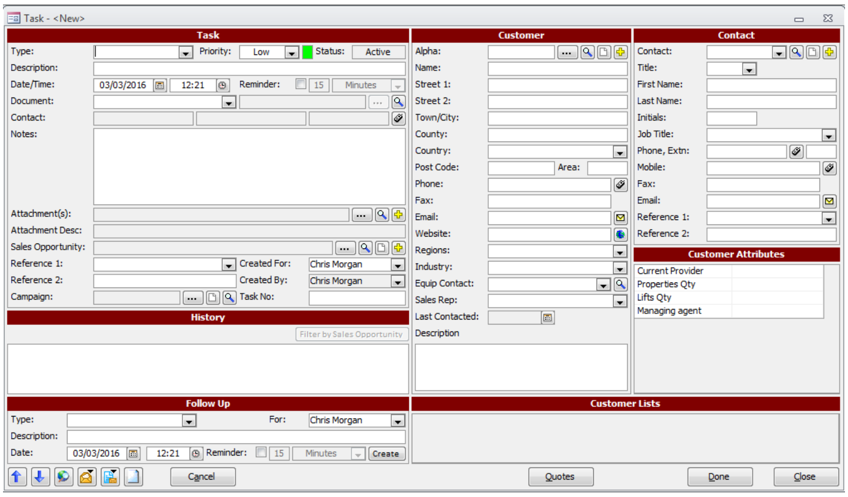


Creating a new Task (using the Sale Task form):

To create a new Task, click on the drop down arrow below the Tasks Icon and select **Create Task**:



The system will then display the appropriate Task screen seen earlier:



The screen is split up into various sections:

<u>Task Section:</u>

1. Using the drop down arrow icon, select the type of Task which is required. These are setup in **Settings > CRM > Task Types**.

For example a task type of "Phone call" may be required to contact a customer to chase the payment of an invoice, or you may wish to choose "Reminder" to remind you to order a part for a piece of equipment.

2. If required you can choose a priority from the drop-down list to mark this task as **High**, **Medium** or **Low** priority.
3. Now enter in a **Description** of what task you will need to perform.

For example "Courtesy call to customer".

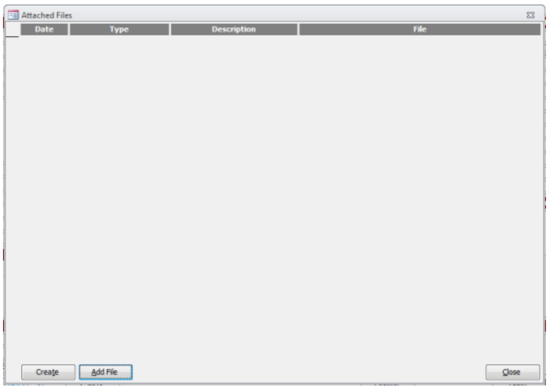
4. If you want Protean to remind you that a task is due, tick the **Reminder** box and enter the time interval at which you would like to be reminded. You can enter how many minutes you want the Pop-Up box to appear on the screen prior to the time you have entered for the task to be completed.

For example if a task was requiring completion at 12pm and 'Remind me' was set at 15 minutes; Protean will show a pop-up box at 11.45am advising you of the forthcoming task which requires an action.

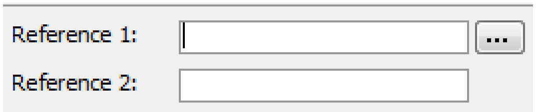
5. You can choose to attach your Task to a Document, using the **Document** drop down arrow.
6. Once selected, you can then use the Search button: ..., to then search for the document required. If this task is not connected to a Document, then leave this field blank.
7. Use the **Notes** box to add any additional notes that may be required.
8. You can use the **Attachment(s)** field to attach any particular documents, files etc. that are linked to the Task being created.

For example you may want to add a Quote which needs to be emailed to a customer.

9. To do this, click on the Search button: and the system will display the **Attached Files** screen:



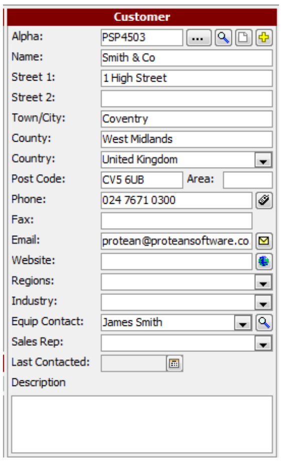
10. Then click on the **Add File** button shown in the bottom left hand corner of the screen: Add File.
11. Search for the File required and then click on the **Open** button. Then click on the **Close** button.
12. This Task can be linked to a **Sales Opportunity** by clicking on the Search button: and the system will display a list of existing Sales Opportunities already created in the system.
13. You can also create a new Sales Opportunity, by clicking on the Create New button: .
14. Up to 2 additional fields of reference can be entered in the **Reference 1** & **Reference 2** fields. The descriptions of these fields can be setup in **System ¦ More ¦ User References** and then selecting **Tasks.** Enter the new descriptions required:



15. Then click on the **Close** button.
16. You can also link this Task to an existing **Sales Campaign**, by clicking on the Search button: .

Customer Section:

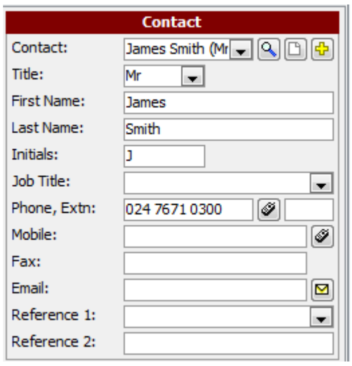
1. Enter the **Alpha Code** of the Customer / Site / Prospect if know, or use the Search button: . Once the required record is selected, the system will display the Customer details and any Contact details if applicable:



In this screen, the details shown can be added, amended as required.

Contact Section:

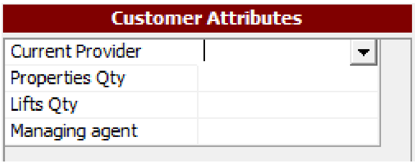
If already attached to the Customer record already selected, details of the Contact will also be displayed:



In this screen, the details shown can be added, amended as required.

Customer Attributes Section:

If Customer Attributes have been setup in **Settings ¦ CRM ¦ Customer Attributes**, they will be listed in this section:



In this screen, the details shown can be added / amended as required.

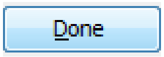
History Section:

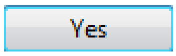
This will display the CRM history of the Customer and will be completed by the system as various Actions / Tasks are completed.

Follow Up Section:

You can use this section to setup a follow up task if required.

Completing a Task:

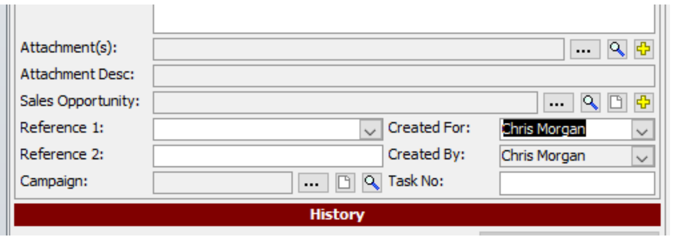
Once all of the information has been entered, click on the 

button. After clicking on the 

button to confirm that you wish the Task to be marked as Complete, the CRM History is then updated accordingly:

Tasks - Creating for Other Users

- Create the Task in the normal way, as described above. Then in the Tasks Section, there is a field with a drop-down list called 'Created For':



- Use this list to select the user that this Task is for and then close the Task.

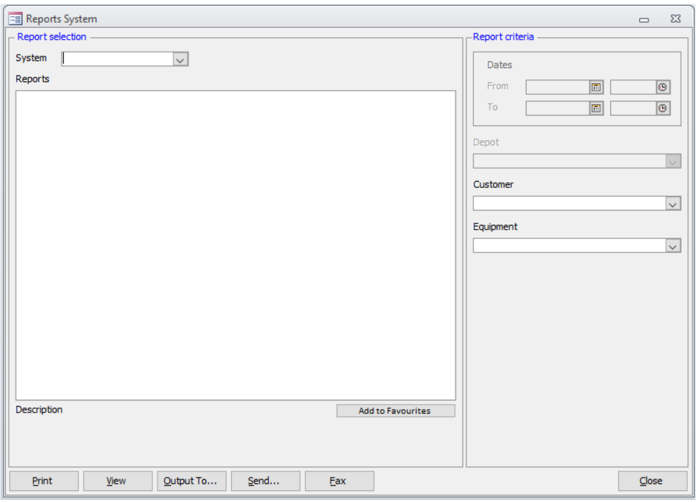
- The Task will be added to that users Task List on the Global Enquiry screen, and if a reminder has been requested, this too will pop-up on the selected users screen.

Note: As the Task system is user-based it will not matter which PC he/she uses, the reminder will still find them.

Reports

The Protean System comes with a variety of standard reports, which can be accessed by clicking on the Reports Icon:

The system will then display a screen as shown:



Then use the drop down arrow icon next to the System field, to select the area of the system you need a report for.

Depending upon which area is chosen, the system will then display all of the standard reports. By single clicking on the Report Name, the system will give a brief description of what is contained in the report.

Report criteria can also be entered in the top right hand corner of the screen if required. The fields available are dependent on the report selected.

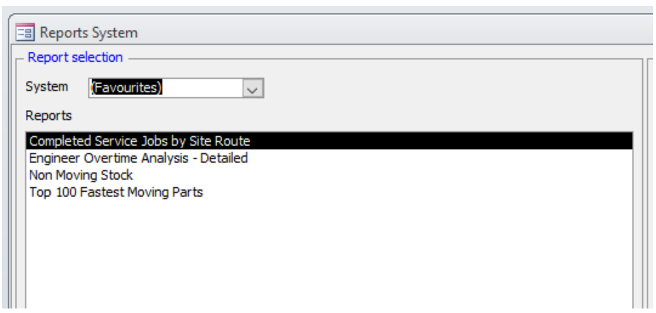
Once the report has been selected, any criteria entered you can then either print / view / fax or email the report, or alternatively output the report into another format, such as PDF or Excel for example.

Favourites:

To save searching for a report each time you want to run it, you can set it up as a Favourite.

To do this, simply single click on the report required and then click on the Add to Favourites button. Click on **Yes** to confirm your selection. Follow this process each time you wish to add a report to your list of favourites.

Next time you click on the Reports Icon, the system will then display your own personal list of favourite reports that you've setup:



Note: If you wish to remove a report from your Favourites list, simply single click on the report concerned and then click on the Remove from Favourites button.

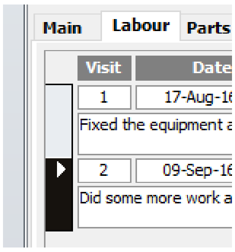
Hints & Tips

Please find below some basic tips to help you navigate the Protean System.

Deleting Records:

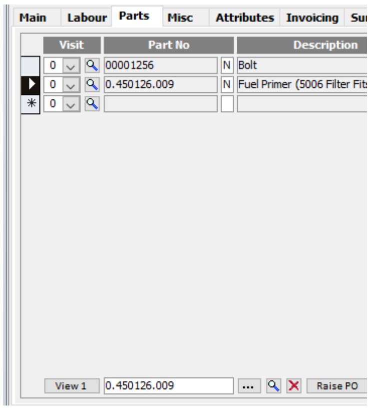
Throughout the Protean system, you are able to delete certain records from various screens. However, the way that you do this does depend on which screen you are in and what item you're trying to delete.

1. **Using the Delete button:** On a Job, in the screen that displays the various visits that have been made on the Job, you can delete a visit by selecting the visit required using the small arrow column on the far left hand side of the screen and then click on the **Delete Visit** button shown in the bottom left hand corner of the screen (The ability to delete a visit in this way, is dependent on the status of the visit selected).

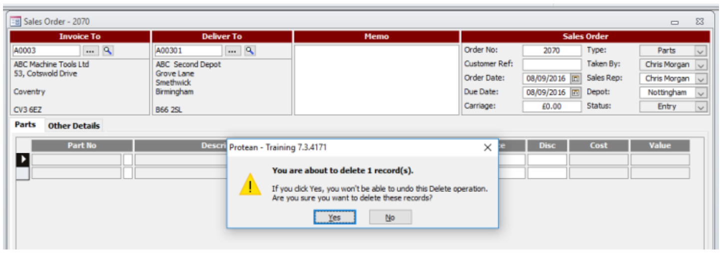


2. **Using the ✖ button:** For example, on a Job screen, in the screen that displays the various Part Stock Records added to the Job, you can use this button to delete it. You must firstly select the part required, using the small arrow column on the far left hand side of the screen and then click on the ✖ shown along the bottom of the screen.

   (The ability to delete a part in this way, is dependent on various criteria that the system will warn you about when you attempt to delete it).

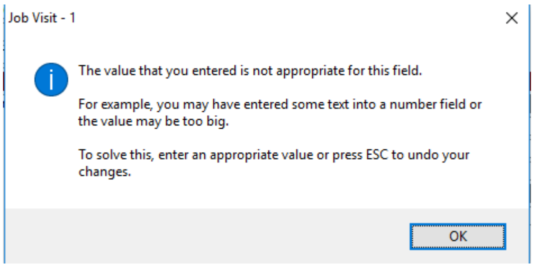


3. **Using the Delete key on your keyboard:** For example, if you enter a Part Number on a Sales Order and you then decide that you don't want it anymore, you have to use the Delete key on your keyboard to remove it from the Sales Order. You must firstly select the part required, using the small arrow column on the far left hand side of the screen and then use the Delete key on your keyboard to remove it from the Sales Order.



   (The ability to delete a part of a Parts Sales Order, is dependent on the status of the Sales Order itself. If the Sales Order has already been placed, then this functionality isn't available).

Using the Esc button on your keyboard:



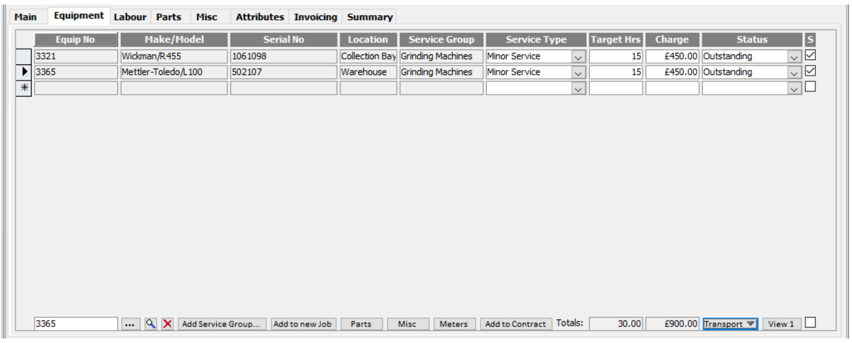
If you are ever using the system and the screen appears to have locked up and won't let you proceed, try using the **Esc Key** on your Keyboard to allow you to carry on. A common error message that is displayed looks like this one:

Click on the **OK** button to acknowledge the message and then press the **Esc Key** on your keyboard.

The system should then allow you to enter the information in again or to exit from the screen concerned.

The View Button:

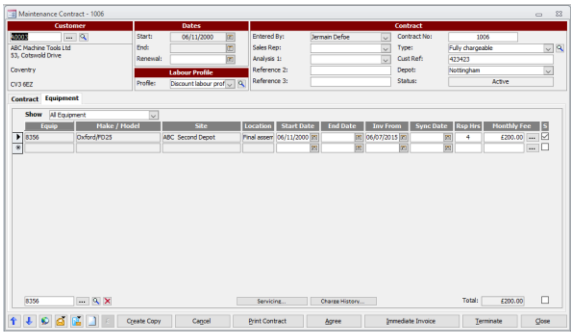
If your Company is using Multi Equipment Jobs, on a Job and in the Equipment Screen, the system will display an additional View 1 button in the bottom right hand corner of the screen, which is not seen on Single Equipment Jobs:



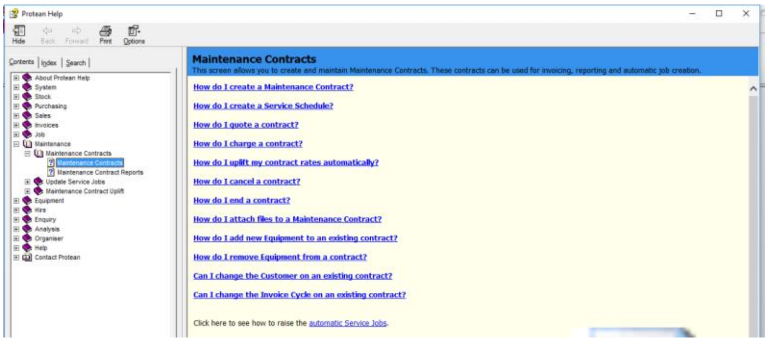
By clicking on this View 1 button, a user can scroll through a number of additional screens, which will display additional information as required.

On screen Help:

As you navigate around the system, don't forget that you can press the **F1 key** on your keyboard to get some basic help on the screen / process you are currently in. For example, if a user is in a Maintenance Contract screen:



Pressing the **F1** key on the keyboard would then display some basic information regarding Maintenance Contracts:



Contacting our Support Desk:

Our support team are available from 8:45am to 5:15pm Monday to Friday. Their contact details are as follows:

- Telephone Number: 02476 710310
- Email Address: suppport@proteansoftware.co.uk

If you are receiving an error message on your screen, if possible, it is always a good idea to make a note of the error message or better still take a screen shot, which will enable our support team to advise you accordingly.

Additional Courses:

We also currently offer a range of more detailed Classroom Training Courses, covering the following areas of the system:

- **CRM Module**
- **Stock Management Module**
- **Hire Module**
- **Maintenance Module**
- **Job Management Module**
- **Mobile Engineer PDA Application**

Please contact us on consultants@proteansoftware.co.uk for further information on course contents, dates etc.