

Protean 7.4

All new Front-End Technology & Look

Office 365 Support

The Protean front-end has been completely updated using the latest Office 365 technology to ensure future compatibility with Microsoft updates & releases.

Protean FSM Graphical Updates

All of the graphics in Protean have been updated including a new colour scheme; desktop icon & splash screen. All new menu images have been applied as part of re-structuring to make the menus simpler & easier to use.

The screenshot displays the Protean 7.4 software interface for a job record. The window title is "Job - 18290". The interface is divided into several sections:

- Equipment:** 91707, Mitsubishi FD18, SN: 07019027168, On Hire, Multi-Equipment.
- Site:** CUSTTEST01, Some test customer Site.
- Customer:** CUSTTEST, All data for customer test, Automated Te, Herald Avenue, Coventry, West Midlands, CV6 6UV.
- Job:** Contact Name: Example Contact, No: 18290, No-Charge, Contact Phone: 12121212, Type: Hire Breakdown, Contact Email: [empty], Order No: [empty], Priority: Low, New Wrk: [checked], Authority: [empty], Status: Unallocated.

The main area contains a "To Do" list with a sample list: "- item1", "- item2", "- item3".

The "Reference" section includes:

- Depot: Coventry
- Entered By: Chris Morgan
- Logged: 28/04/2020 14:07
- Due: 28/04/2020 16:07
- Instructed: [empty]
- Complete: [empty]
- Invoiced: [empty]
- Invoice No: [empty]
- Completed By: [empty]
- Sales Rep: Jane Sales
- Booked by: [empty]
- J Ref 2: [empty]
- Inspection: [empty]
- Transport: No, Collect, Deliver
- Attachments: No
- Credited: No

The bottom section includes:

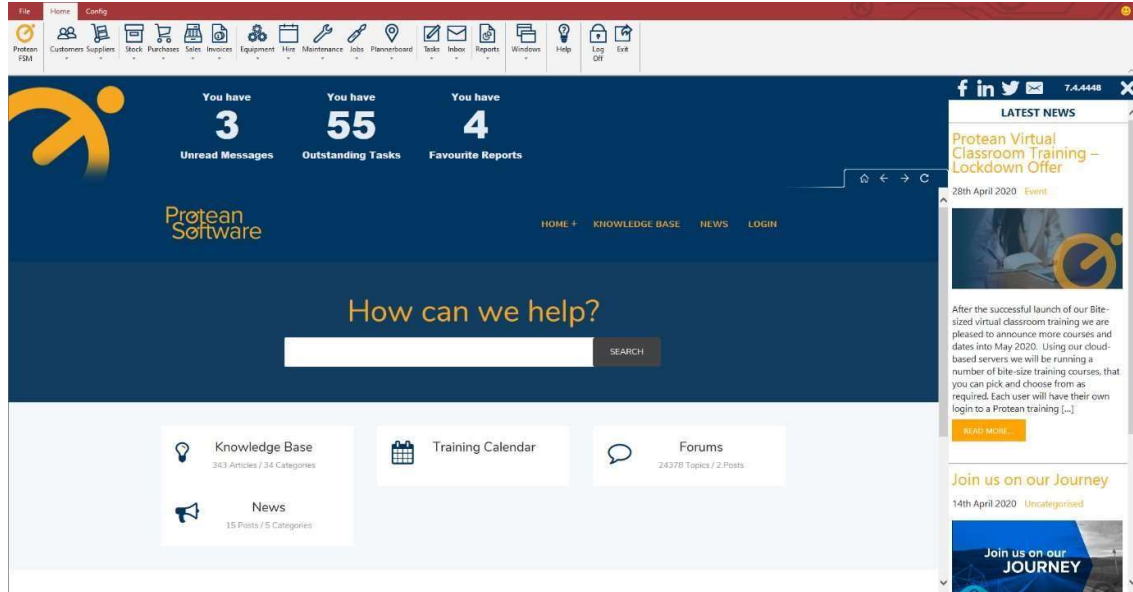
- Job Classification:** Fault: No Brakes, Cause: new seat required, Action: Refitted Bolts.
- Equipment Service:** Contract: [empty], Next Service: 01-Jan-29, Last Service: 01-Sep-97, Minor Service.
- Cancellation:** Date: [empty], Reason: [empty], By: [empty].

The bottom navigation bar contains buttons: Create Copy, Cancel, Place, Add Visit, Waiting, Complete, Invoice, Close.

New Home Page

A brand new landing page has been added that opens on log in and displays Links to unread messages, tasks & reports as well as the Protean support website, allowing you to read articles and watch videos with the system. Also on the Home Page is a news feed to help you keep up to date

with Protean news & events and links to our social media pages and even a link to email the support desk.



Other Enhancements

Sage 50c V27 support

This release of Protean is now compatible with the latest release of Sage 50c V27 – <https://my.sage.co.uk/public/help.aspx#/customer/support/accounts/new-release>

Ability to put Suppliers On Hold

A new Supplier Hold section has been added to the Accounts tab of the Supplier record to allow you to flag a Supplier as 'On Hold' and choose a reason why they are 'On Hold'. When a Supplier is on hold new purchase orders cannot be raised but existing ones can be processed. This flag also is now available as a column on the Suppliers Global Enquiry screen & in the Advanced Filter.

Internal Notes added to Maintenance Contracts

A new field has been added to Contracts to allow users to record internal notes that do not print on any paperwork – contract or invoice.

Extend Stock Levels Import Schema to include Serial Nos

It is now possible to import parts & update part balances with serial numbers.

Extend Customer Import Schema to include Email Addresses

It is now possible to specify customer email addresses as part of the Customer Import routines.

Mobile App

Ability to print Job Sheets

For your customers that have no access to email we have added the ability to print a hard copy of job sheets direct from the mobile app.

Colour-coded Job Sheet Sign Off

Ensure that both engineers & customers know exactly what they are signing for when closing jobs on the mobile app with the new colour-coded job sheet screen. If the job is non-chargeable the form then the job sheet will be grey. If chargeable, the job sheet will become green so that all parties are aware that an invoice will be raised.

Ability to Restrict Engineer from Searching All Stores

A new access right has been added to control whether an engineer can only search his or her own van stock rather than having access to all stores, for reference purposes.

Ability to hide Obsolete Parts

New access right so you can determine if obsolete parts should appear for selection on the engineer's mobile app during searches.

Ability to Hide Zero Level Parts

A new access right that allows you to control whether an engineer sees all parts, regardless of balance in stock when searching, or just those that have a balance greater than zero.

Ability to Control Adding Parts to Jobs if Insufficient Stock

New access right to control whether engineers are allowed to add parts that they have insufficient quantities of on their device.

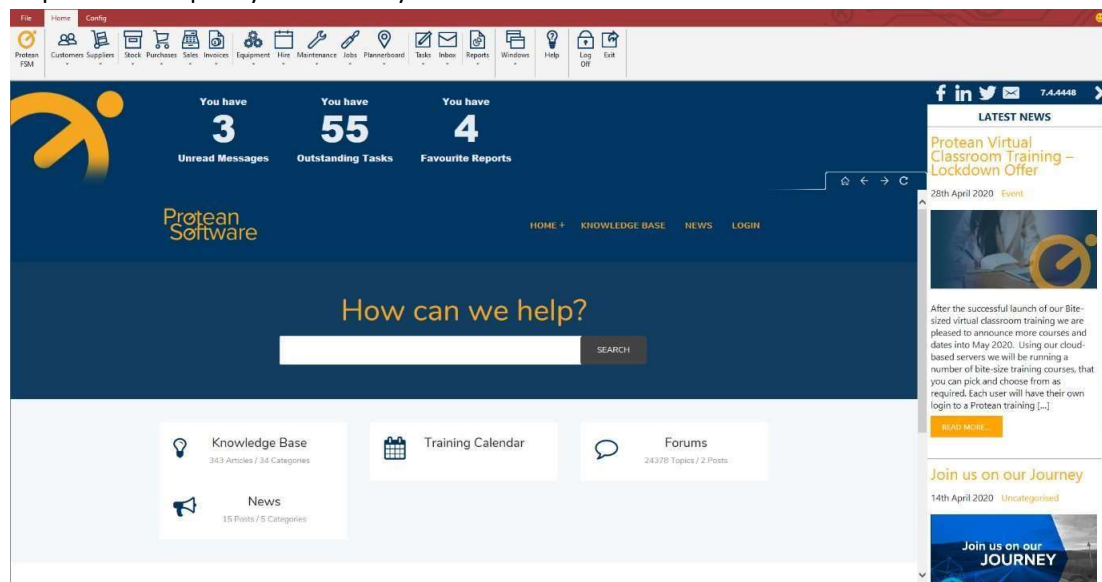
Web Portal

Updated Banner on Web Portal

Ability to Search by Customer Address on Web Portal

The search facility on the Jobs List has been extended so that all elements of a customers address can be searched including all address lines & the post code.

On the Job/Quote Request a Site Address Filter has been added to enable your customers to add requests more quickly & accurately



Bug Fixes

- **FaultID 6256 - The nominal analysis does not match the net total - Sage 200 tax codes**
The nominal analysis does not match the net total - happens when the default supplier tax code is not on the supplier invoice.
- **FaultID 6208 - Number of JSI not creating correctly when 'One per job' is selected**
If the setting 'Maintenance Update service number of Job Stock Issues to create' is set to 'One per job', the setting is ignored and one JSI is created for the whole update service run
- **FaultID 6215 - Part record import <DO NOT IMPORT> blanks out data in fields**
If you use the <DO NOT IMPORT> clause on an import it will remove the data from the field for example if you have a stock record with notes entered and do a Part record import and enter <DO NOT IMPORT> into the notes column it will remove the notes from the stock record rather than leaving them as they are.
- **FaultID 6255 - Optimistic concurrency check failed. The row was modified outside of this cursor.**
Error appearing when trying to modify custom job type of the job type that loads as a first one on the list, where original job type meets following criteria:
 - Invoicing & recharge are switched off or all charges (Labour, Mileage & Travel) are off
- **FaultID 2581 - Error 32766 OutputType When printing PO's from Global Enquiry View**
Error 32766 OutputType when printing PO's from Global Enquiry View
- **FaultID 5523 - All employees show as inactive**
Selection criteria for status appears to be incorrect as all employees show as status Inactive
- **FaultID 6266 - "SSMA_CC\$tblJob\$FlatCharge\$validation_rule"**
If a service group has multiple equipment records, if the flat rate charge is rounded up to the nearest penny, the system attempts to enter a negative rate against one of the equipment records, causing the error message to occur
- **FaultID 6276 - Flicking backwards through calendar dates is slow on the plannerboard.**
When cycling through the days on the plannerboard historically sometimes the performance can be slow.
- **FaultID 6238 - Can overlap jobs with activities on the mobile device**
Engineers can overlap visits with activities on the mobile device. The system doesn't prompt them that there is an overlap, and this then causes issues with the timesheet submissions