

Protean 7.4

Feature Release 3.5

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JOB -----

Using FC Price Lists on Jobs

Now that special prices on Price Lists can be entered in the customers currency the Job form has been updated to respect these prices and not recalculate them. This ensures that the price agreed is the one charged & invoiced.

SALES -----

Using FC Price Lists on Sales Orders

Now that special prices on Price Lists can be entered in the customers currency the SO form has been updated to respect these prices and not recalculate them. This ensures that the price agreed is the one charged & invoiced.

GENERAL -----

New Version Available Message on Home Page

Protean will now check that you are on the latest version available. If an upgrade is ready then a message is displayed to the user.

Price Lists – Specifying Special Prices in Foreign Currencies

Sometimes special prices for Parts & Misc on Sales Orders & Jobs are agreed with foreign customers in their currency rather than the base currency of the user. Entering these prices in base currency can cause problems when using them on Jobs & Orders due to exchange rate differences or rounding issues.

You can now enter customer special prices for Parts & Misc on Price Lists in the currency of your choice. In this way everyone one know what price the customer is paying and it won't fluctuate.

Global Enquiry Print Button

By popular demand this facility has been reinstated but is now dependant on a new setting called "Global Enquiry Enable Printing". By default this is turned off.

ACCOUNTS -----

Sage 200 2022 R1 Support

In order to support the latest release of Sage 200 we have updated the .NET version of our Sage assembly. No changes are required to set up or configurations therefore.

QuickBooks – Additional Protean Sales Item Setting

To facilitate the reporting of sales tax to two different tax authorities (e.g. UK & Eire), Protean now allows the selection of an 'Alternate Sales Item Name' in General Settings. This ensures that the net is shown correctly on the appropriate VAT return.

QuickBooks – Additional Protean Purchase Item Setting

To facilitate the reporting of purchase tax to two different tax authorities (e.g. UK & Eire), Protean now allows the selection of an 'Alternate Purchase Item Name' in General Settings. This ensures that the net is shown correctly on the appropriate VAT return.

QuickBooks – Link Now Supports Reporting to Two Tax Authorities

The posting routines from Protean to Quickbooks have been updated to correctly supply the Sales & Purchase Item information (see above) so support reporting to two tax authorities at the same time. This behaviour is controlled by a flag on the Customer Tax Code in the VAT Set Up form labelled 'Alternate'.

Engineer Mobile App -----

Equip User Ref 1 & 2 Added to Job Equip List

Users can now display Equipment User References 1 & 2 on the mobile app if desired.

A new setting has been added to General Settings called "PDA Engineer Add Equipment User Ref 1 & 2 to Job Equip List" that controls this behaviour. By default it is set to 'No' and can be changed if users desire to have User Ref 1 & 2 display.

Ability to Search Jobs List

The search icon on the jobs list screen now opens a collapsible search bar. This enables engineers to type in search criteria and have it apply to the jobs list to make finding a particular entry easy, especially in a long list.

Engineers can search on the following fields: Site Name, Address 1, Post Code, Job Number, Job Category, Job Type (and Equipment Number on Single Equipment Jobs only)

Viewing & Editing Job Attributes on the Mobile App

Engineers can now view, modify & delete job attributes directly on the mobile app. These behaviours are controlled by new access rights that have been added. Each Engineer can be given appropriate permission as desired.

Office users can also choose which job attributes are shown on the mobile app in Job Attributes where a new column has been added called "PDA". By default none are selected. Users can tick the box alongside job attributes they wish Engineers to have access to.

Ability to Use Timestamped Photo App with Android 11

In Android 11 you can no longer select to use a 3rd party camera app from within the Protean Engineer Mobile App. This has now been resolved by allowing support to select 'approved' apps for the mobile app to use on Android 11. Please contact support if you are experiencing this issues.