Protean 7.4

Feature Release 3

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JOBS ---

Inspection Photos

Inspection Note Types (on Inspection Code form) have been enhanced to include the option of ‘Photo’.

Engineers can now take or select photos to be added as a valid response to an inspection on the mobile app. Photos are stored as job attachments with the path to the image held against the specific inspection attribute.

Uncomplete Job Options Expanded

The current functionality when attempting to uncomplete a job has been expanded to allow the uncomplete of all types of jobs including:

Multi-Equip Jobs; Service Jobs; Equipment Value Jobs & Off Hire Inspection Jobs

All transactions and movements are reversed correctly for the given scenario e,g service dates, costs, status changes & postings being rolled back

Additional User Ref Fields Added

Two new text user reference fields have been added to the Job form and are also available on the Global Enquiry as columns and in the filtering options.

Depot Added to Jobs Advanced Filter Options

The Advanced Filter on the Jobs Global Enquiry form now includes ‘Depot’ as an option.

Ability to Specify if Inspections Require a Signature

On Inspection Templates users can now choose whether a signature is required from either customers and/or engineers on completion. The default values are:

- Pre-Visit – Both
- Post-Visit – None
- In-Visit – None
- Customer Feedback - None

New ‘Service Details’ Button on Job Details on Mobile App

A new option has been added to the mobile app to allow engineers to access the service details of an item of equipment prior to accepting a job.

For Multi-Equip Jobs – Use the 'View Service Details' menu option when user taps on the Equipment in the list form

- For Single-Equip Jobs – Use the 'Service Details' button at the bottom of the form.

New Setting to Control Auto 'To Do' Text Behaviour

A new setting has been added called 'Populate To Do using Job/Service Type and associated behaviour' with the following options:

- Job Type (description field)
- Service Type (description field)
- Both
- None

When a new job is created in Protean (or on Mobile App or via the Web Portal) the To Do text can be automatically populated from the selected source in the setting.

If the To Do field is already populated, then the user is asked if they want the current text to be overridden.

Time Added to Last Visit Date on Jobs Enquiry

The existing column on Job Global Enquiry called 'Last Visit Date' now also displays the Time Off value.

Contract Validation Changes on Job Completion

When a job is completed, the system checks the linked maintenance contract as before but instead of preventing the user from completing the job they are now given the ability to continue with completion if desired.

Scenario 1

- Equipment 1 is on contract X, so job is also attached to contract X
- Equipment 2 is not on a contract and is added to the job (via mobile or office)
- When completing the job system should warn the user; however, continuing anyway will allow the job to be completed and processed as normal.
- When the Job Profit table is updated then the Contract No on the job should only appear against the appropriate equipment lines. Equipment 2 even will show no Contract No.

Scenario 2

- Equipment 1 is on contract X, so the job is also attached to contract X
- Equipment 2 is on a contract Y and is added to the job (via mobile or office)
- When completing the job system should warn the user; however, continuing anyway will allow the job to be completed and processed as normal.

- When the Job Profit table is updated then the Contract No on the job should only appear against the appropriate equipment lines. Equipment 2 even will show no Contract No.

Scenario 3

- Equipment 1 is not on a contract, so the job is also not attached to a contract
- Equipment 2 is on a contract Y and is added to the job (via mobile or office)
- When completing the job system should warn the user; however, continuing anyway will allow the job to be completed and processed as normal.
- When the Job Profit table is updated then the Contract No for both records will not be populated.

Ability to Upload Job User Refs

Users can now import & update Job User Reference field data. The template allows users to specify a Job Number and the values for each of the four user ref fields on the Job form, or to remove current values.

- Job Number (mandatory)
- UserRef1
- UserRef2
- UserRef3
- UserRef4

If "<CLEAR FIELD>" is used, the field is updated to Null.

If the field says "<DO NOT IMPORT>" or is left blank nothing will change in system.

EQUIPMENT ---

Make Field Increased to 50 Characters

The Make field has been increased from 30 to 50 characters

Maintenance Contract Added to Equipment Global Enquiry

A new column ‘Maintenance Contract Number’ has been added to the Equipment Global Enquiry screen options.

This value is displayed if the Contract is active.

CRM --

Sales Rep/Employee Drop-Downs Improved

To help improve user experience within the CRM features in Protean a number of changes have been made regarding the employee drop-down fields as they contain all employees, regardless of status.

- An 'Inactive' status flag has been added to appear next to the employee name
- The sort order has been changed so that all inactive records appear at the bottom of the lists.
- If a user selects an inactive record then they are informed and the selection is disallowed

'External Site Ref' Added to Customer Global Enquiry

The 'External Site Ref' field from the Customer record is now available in the Customer Global Enquiry screen and in the Advanced Filter options also.

Sales Opportunity Number Added to Task Screen

The Sales Opportunity Number now appears on the Task form alongside the Sales Opportunity Description. This applies to both the Simple & Sales Task forms.

Sales Opportunity Populated on Tasks

When a Task is create from another document that is already linked to a Sales Opportunity the Sales Opportunity is now linked to the new Task also. This applies to Tasks created from Jobs, Equipment Quotes, Sales Orders, Maintenance Contracts, Hire Contracts.

QUOTATIONS ---

Make/Model Options Allowed Without Link to Attribute

Users can now set up Make/Model Quote Options without having to link them to an Equipment Attribute.

SALES --

Recalling a Placed Sales Order

A new ‘Recall’ button has been added to the Sales Order form which reverses the status of a placed Sales Order, allowing changes to be made.

A new Access Right has been added to control access to this new button.

GENERAL ---

New Access Right to Restrict ‘Home Page’ Access

A new access right ‘Home Page’ has been added in the ‘Other’ section of the access rights form.

If excluded users will no longer be presented with or be able to navigate to the Home Page feature.

Mapping Updated to Latest Version

The maps in Protean now use the latest dll’s provided by Google. There is no change in operation.

ACCOUNTS ---

Sage 50c 2022 (v28) Support Added

Support has now been added for Sage 50 v28 including the ability to import Customers, Suppliers & Nominal Codes and export Customers, Sales Invoices & Credits, Purchase Invoice & Credits & Nominal Journals.

Sage 50 Version Numbers Added

All supported Sage 50 versions in the ‘Accounts System’ list now show both year and version number for added user clarity.

Sage 200 – Split Narrative Text

When posting to Sage 200 the Narrative1 & Narrative2 fields in Protean have now been split to go to different destinations ie

Narrative1 = Sage 200 ‘Reference’ field

Narrative2 = Sage 200 'Narrative' field

WEB PORTAL --

New Access Rights Available

Users can now choose to hide the time element in the following areas of the web portal:

Customer Web, Forms, Job List, Actions

- Show Logged Date
- Show Completed Date

Customer Web, Forms, Job Details, Actions

- Show Logged Date
- Show Due Date
- Show Completed Date

Users can now also choose to hide the 'authority' field on the web portal. They can also use access right to hide the 'parts used' section of the job details screen.

An access right has also been added to control the visibility of the Maintenance Contract Type on the Web Portal that now is available on the Job Details & Equipment Details screens.

Customer Web, Forms, Job Details, Actions

- Show Contract type

Customer Web, Forms, Equipment Details, Actions

- Show Contract type

Ability to Hide Certain Makes & Models from Web Portal

A new flag has been added to the Make/Model form in Protean to allow users to choose whether Equipment of this Make/Model should be visible on the Web Portal or not.

By default all Make/Models are visible but checking the box will exclude any equipment of the selected Make/Model from appearing on the Web Portal in the following locations:

- Viewing the equipment list
- Job Request and selecting equipment.
- Job Details
- Inspections
- Maintenance Contracts

- Home Page Equipment Count
- Reports: Equipment Down Time - Detailed & Summary, Equipment List & Job First Time Fixes

Work Required Templates on Job Request

A new Notes field has been added to the Make/Model form in Protean called ‘Work Required Template’ for users to add text to specify a work description for jobs logged via the portal.

When requesting jobs via the Web Portal the appropriate text is automatically copied into the Work Description field.

If Multi-Equip is allowed (see below) then when selected the Equipment Work Description fields are populated from the respective Make/Model record.

New Setting to Control Job Request Equipment Selection

A new setting ‘Customer Web Disallow Multi-Equipment Job Requests’ has been added.

This allows users to choose whether to allow their customers to add more than one item of equipment to a job request via the web portal.

Mobile Sync Improvements --

Unbreakable Sync

Further work has been carried out on the Android sync following the last release. Now the sync is performed on a modular basis and any exceptions arising with specific jobs or activities will no longer stop the sync, which will complete successfully.

Any unsynced data remains on the device until it can be synced

Sync Report

A new button the main menu called ‘Sync Report’ has been added that is displayed if there are errors in a previous sync.

This allows users to see the last sync activity including a list of the unsuccessful data sync items in a readable and understandable format.

Users are informed that "Any failed items will be automatically retried in the next sync. Please contact support for further help" with the Support phone number.

As items successfully sync they are removed from the report.

A checkbox also allows users to switch between important (transactional) and non-important (non-transactional) issues.

A checkbox has also been added to authorise Support to view a full record dump for every issue.