

Protean 7.4

Feature Release 4

March 2023

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Jobs

Project Invoicing

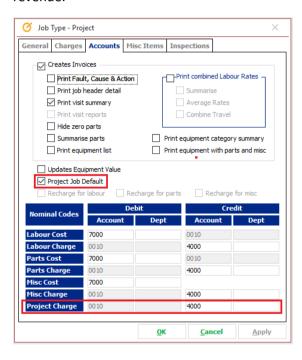
The latest release of Protean 7.4 includes exciting features to help users manage their projects and is focused on all new staged payment facilities, cost apportionment, automated retentions and retention invoicing.

Project Job Default

A new flag has been added to the Job Type, Accounts tab to control whether Project Invoicing functionality is enabled by default on a per job type basis.

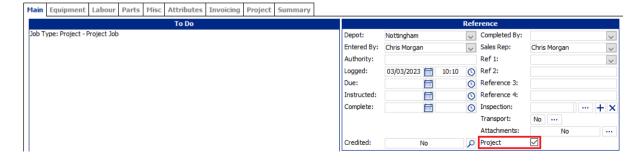
Project Charge Nominal

The Job type, Accounts tab has been updated to allow users to specify a nominal code for project revenue.



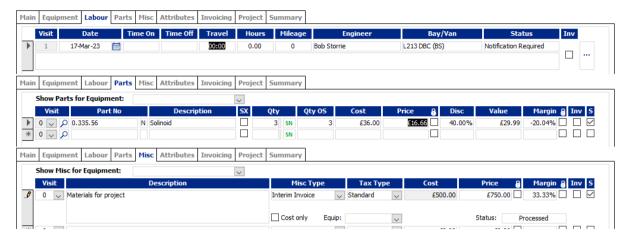
Job Project Flag

A new check box has been added to the main job form to allow users to indicate that this is a project job, or that they will need to invoice it more than once. The project flag will appear for all chargeable job types with is default behaviour based on the 'Project Job Default' flag on the job type.



Cost/Charge Apportionment

To facilitate users being able to specify which components of a job are ready for invoicing, a new invoicing flag, 'Inv' has been added to the Labour, Parts and Misc tabs.



Project Tab

A new Project tab will be displayed when the Project flag is enabled on a job, the Project tab details all of the invoices/credits that have been raised against the job, along with any costs that have been apportioned at each stage.

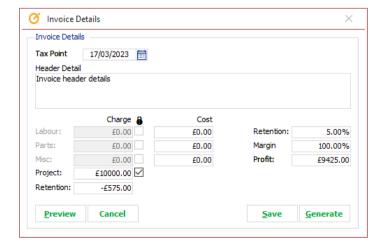


New Invoice

The New Invoice options can be used to create the various stages/billing points for a particular project. The screen dynamically updates based on the items that have been selected for invoicing (Labour, Parts, Misc) and display the costs for each stream that will be apportioned.

Project charge and retention percentage can be adjusted prior to producing the invoice.

The 'Save' button can be used to record each planned project invoice, prior to actual invoicing.



Project Details

Five new fields are available to track Project information:

- 'Project Value' A field to hold the total expected revenue for a project
- 'Remaining Value' A calculated field based on the Project Value less Total Invoiced (Plus Credit) including retention.
- 'Retention %' A field to store the agreed retention rate for the project
- 'Retained' Total value that has been retained by the customer based on invoices raised
- 'Retention Due' A date field to record when retention is due to the be invoiced



Summary Tab – WIP Value

A set of fields labelled WIP Value re now visible on the Job, Summary tab. The values show how much of the respective costs (Labour, Parts, Misc) remain in WIP after taking into account costs apportioned to each invoice on the job.

	Labour						
	Hours	Value	Parts	Misc	Project Charge	Total	Margin
Actual Cost	0	£0.00	£0.00	£500.00		£500.00	
Calculated Charge	0	£0.00	£0.00	£0.00	£0.00	£0.00	
Actual Profit		£0.00	£0.00	-£500.00	£0.00	-£500.00	0.00%
Outstanding Cost			£0.00	£0.00		£0.00	
Budgeted Cost	0 🗆	£0.00 ···	£0.00	£0.00		£0.00	
Cost Variance	0	£0.00	£0.00	£500.00		£500.00	
Est. Cost to Complete		£0.00	£0.00	£0.00		£0.00	
Quoted Charge	0	£0.00 ···	£0.00	£0.00	£0.00	£0.00	
Forecast Profit		£0.00	£0.00	-£500.00	£0.00	-£500.00	0.00%
WIP Value		£0.00	£0.00	£500.00		£500.00	
Realised Profit						£2925.00	-

Settings

Settings form

Protean now has a redesigned settings form with a new navigation pane and search bar to make it easier to find the setting you need the first time.

Accounts

Sage 50 v29 2023

This latest release now supports Sage 50 v29 (2023), the new version is available to select in General/Settings

Engineer Mobile App

Inspection Number Visible on Mobile App

Engineers can now view the unique inspection number for each inspection on the mobile app.

Customer Not Present Toggle

To control whether a customer signature is required on the mobile app, Protean now allows the select of 'PDA Engineer Disallow Customer Not Present Sign-Off' in General Settings.

Bin Location Visible on Mobile App

Engineers can now view the bin location for a specific part at any store they have access to.

Control Ability for Engineer to Add New Inspections

Protean now has two new permissions which can be revoked.

- Engineer PDA / Forms / Equipment / Actions
 - Add Inspection (excluding a user from this permission will disable their ability to add an inspection on the mobile app)
- Engineer PDA / Forms / Jobs / Actions
 - Add Inspection (excluding a user from this permission will disable their ability to add an inspection on the mobile app)

Control Ability for Engineer to Change Equipment on a Job

Protean now has a new permission which can be revoked.

- Engineer PDA / Forms / Jobs / Actions
 - Change equipment (excluding a user from this permission will disable their ability to change equipment on a single equipment job or swap equipment that is already on a multi-equipment job)