



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 Type - Project

General Charges **Accounts** Misc Items Inspections

☒ Creates Invoices

☐ Print Fault, Cause & Action

☐ Print job header detail

☒ Print visit summary

☐ Print visit reports

☐ Hide zero parts

☐ Summarise parts

☐ Print equipment list

☐ Print combined Labour Rates

☐ Summarise

☐ Average Rates

☐ Combine Travel

☐ Print equipment category summary

☐ Print equipment with parts and misc

☐ Updates Equipment Value

☒ **Project Job Default**

☐ Recharge for labour ☐ Recharge for parts ☐ Recharge for misc

Nominal Codes	Debit		Credit	
	Account	Dept	Account	Dept
Labour Cost	7000		0010	
Labour Charge	0010		4000	
Parts Cost	7000		0010	
Parts Charge	0010		4000	
Misc Cost	7000			
Misc Charge	0010		4000	
Project Charge	0010		4000	

OK Cancel Apply

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.

Main Equipment Labour Parts Misc Attributes Invoicing **Project** Summary

To Do

Job Type: Project - Project Job

Reference

Depot: Nottingham Completed By:

Entered By: Chris Morgan Sales Rep: Chris Morgan

Authority: Ref 1:

Logged: 03/03/2023 10:10 Ref 2:

Due: Reference 3:

Instructed: Reference 4:

Complete: Inspection:

Transport: No

Attachments: No

Credited: No ☒ **Project**

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.

Main | Equipment | **Labour** | Parts | Misc | Attributes | Invoicing | Project | Summary

Visit	Date	Time On	Time Off	Travel	Hours	Mileage	Engineer	Bay/Van	Status	Inv
1	17-Mar-23			00:00	0.00	0	Bob Storie	L213 DBC (BS)	Notification Required	<input type="checkbox"/>

Main | Equipment | Labour | **Parts** | Misc | Attributes | Invoicing | Project | Summary

Show Parts for Equipment:

Visit	Part No	Description	SX	Qty	Qty OS	Cost	Price	Disc	Value	Margin	Inv	S
0	0.335.56	N Solenoid	<input type="checkbox"/>	3	3	£36.00	£16.66	40.00%	£29.99	-20.04%	<input type="checkbox"/>	<input checked="" type="checkbox"/>
0			<input type="checkbox"/>								<input type="checkbox"/>	<input type="checkbox"/>

Main | Equipment | Labour | Parts | **Misc** | Attributes | Invoicing | Project | Summary

Show Misc for Equipment:

Visit	Description	Misc Type	Tax Type	Cost	Price	Margin	Inv	S
0	Materials for project	Interim Invoice	Standard	£500.00	£750.00	33.33%	<input type="checkbox"/>	<input checked="" type="checkbox"/>

☐ Cost only Equip: Status: Processed

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.

Main | Equipment | Labour | Parts | Misc | Attributes | Invoicing | **Project** | Summary

Invoice/Credit	Tax Point	Total	Cost	Narrative	Retention	Status
Invoice 17256	03-Mar-23	£950.00	£0.00	1st Stage	-£50.00	Invoiced
Invoice 17257	03-Mar-23	£950.00	£0.00		-£50.00	Invoiced
Invoice 17258	03-Mar-23	£1025.00	£0.00		£25.00	Invoiced

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.

Invoice Details

Invoice Details

Tax Point: 17/03/2023

Header Detail


Invoice header details

Charge	Cost	Retention:	5.00%
Labour: £0.00	£0.00	Margin:	100.00%
Parts: £0.00	£0.00	Profit:	£9425.00
Misc: £0.00	£0.00		
Project: £10000.00 <input checked="" type="checkbox"/>			
Retention: -£575.00			

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 be invoiced

Project Details	
Project Value:	£10000.00
Remaining Value:	£7000.00
Retention %:	5.00%
Retained:	£75.00
Retention Due:	31/03/2023 

Summary Tab – WIP Value

A set of fields labelled WIP Value are 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		Parts	Misc	Project Charge	Total	Margin
	Hours	Value					
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 <input type="checkbox"/>	£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 <input type="checkbox"/>	0 <input type="checkbox"/>	£0.00 ... <input type="checkbox"/>	£0.00 <input type="checkbox"/>	£0.00 <input type="checkbox"/>	£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)