Protean 7.4

Feature Release 4.2

Contents

Settings

Depot default setting

To allow user to control the depot that is automatically assigned to new documents (Jobs, Sales order, etc.), four new settings have been introduced to Protean, with the following options:

Default sales order depot

- User depot
- Customer depot

Default job depot

- User depot
- Customer depot
- Site depot
- First equipment depot

Default maintenance contract depot

- User depot
- Customer depot
- First Equipment depot

Default hire contract depot

- User depot
- Customer depot
- Site depot
- First equipment depot

When a new form/document is created the settings above will be referenced to determine which depot to assign; on forms where 'First equipment depot' is specified they will initially be assigned the user depot; which will be overridden when the first piece of equipment is assigned. Forms created from a parent form will use the depot from the parent form i.e. if a purchase order is created from a job, then the depot will be set to the depot on the job.

Access rights

Restrict depot changes

To prevent user from changing the depot assigned to a form/document a new access rights have been added.

Go to config -> Security -> Access Rights

- Hire-> Forms -> Create and Edit Hire Contracts -> Actions -> Change Depot
- Job -> Forms -> Create and Edit Jobs -> Actions -> Change Depot
- Maintenance -> Forms -> Create and Edit Maintenance Contracts -> Actions -> Change Depot
- Purchases -> Forms -> Create and Edit Purchase Orders -> Actions -> Change Depot
- Sales Order -> Forms -> Create and Edit Sales Orders -> Actions -> Change Depot

Users will need to log off and log back on for access rights changes to be applied.