Protean 7.4

Feature Release 4.5

Contents

Office

Project credits notes

The existing Project invoice/credit functionality has been enhanced to support credit notes using a 'Credit Return' reason. Selecting a reason marked as 'Credit Return' will reverse the cost and stock postings created when the relevant Project Invoice was generated.

Quoting in foreign currency

The Jobs module now allows you to price and quote in the customers base currency rather than having to use the system base currency and view the customers price via a currency toggle.

Equipment import updates

The existing equipment import template has been enhanced so that the site and location of existing equipment can be updated via the import routine. A new import template will be made available on the support website.

Batch invoicing options

New options have been added to the batch invoicing screen to allow users to filter documents prior to invoicing.

General tab

- Customer/Site selection
- Job Completed Between dates filters
- Order/Cust Ref text filter

Maintenance tab

- Customer/Site selection
- Order/Cust Ref text filter

Hire tab

- Customer/Site selection
- Order/Cust Ref text filter

Please note if you have clicked 'Generate' to mark the invoices but not raised them ensure you click 'Deselect All' before attempting to raise invoices again with different selection criteria.

Plannerboard additional fields

Site Address fields 1 to 4 are available on the Jobs list section of the Plannerboard and can be reordered and the layout saved.

Quotes global enquiry update

The site name can now be added to the Quotes global enquiry screen. The document supports multiple sites (ie. Maintenance contract) then the word 'Multiple' will be shown. If the document does not have a site then the customer name will be shown.

Ability to export reports in xlsx format for Office 365

Please note this change only impacts users using Office 365 version 2305 and higher.

Protean Built-In Reports:
- Home/Reports Hub/select report/Output To - xls and xlsx format available in the 'Output Format' list
- Any Document/Reports/select report/Export - xls and xlsx format available in the 'Output Format' list
- Home/Reports Hub/select report/View - selecting Export to Excel in the Ribbon will allow xls and xlsx (default) format

User Reports:
- No changes

Accounts link

Outstanding invoice balance support – Sage 50c

A new option is now available on the Ledger Import/Export screen labelled 'Sales Invoice Balances'. Payments will be sync'd from 1st April 2023 by default, this date will be shown on the import screen until you run it for the first time, in order to allow you to change it.

Sales Invoices Balances is also available as a Task on to automate the process via the Protean scheduler.

When running this import (scheduled or manual), Protean will import any payments made against Sales Invoices and deduct the value from the Outstanding Balance, which can be seen on the Global Enquiry Screen.

Increased character limit on Nominal Ledger posting 'Ref' – Sage 50c

The journal transactions being posted to Sage 50c can now have a string up to 30 characters in length.

Mobile

Equipment search updates

The equipment search screen when adding equipment or searching for equipment on a job has been enhanced to allow users to search for data held in User Reference field.

Equipment selection improvements

The mobile application now allows engineers to add multiple equipment records to a job using selection box and/or a select all option.

Parts selection improvements

The mobile application now allows engineers to add multiple stock records in one action to a job using selection box and/or a select all option.

Customer web

New homepage design

The homepage has been completely redesigned to provide end user with a better experience and an overview of the data held in each section.

Job type visibility

The job type has been added to the job details page alongside the existing 'Group' field.

Ability to show the site name on the Invoice/Credit list screen

A new access right has been added (*Disallow Viewing Site Name Column*) to control whether the site name should be shown on the Invoice/Credit list screen. The default behaviour is to **not** show the new column.

Display 'Address line 1' next to the Company name on the Jobs and Equipment lists

A new access right has been added (*Disallow Showing First Address Line with Site Name)* to control when user should see Site's Address Line 1 in brackets on Portal's Equipment List and Jobs List respectively (also in Reports and when adding Equipment to Job Request).