2024

New Releases

Proteus

Sales Module

Low Risk Bid

Our bid no bid workflow is designed to help you decide whether an opportunity is worth pursuing. We have adjusted this feature so that once a bid is deemed low risk, you may skip the remaining steps and convert straight to a proposal.

WBS Enhancements

We have further simplified project planning. Our new drag-and-drop functionality allows you re-arrange work packages with ease.

You can also clone work packages from other projects. Save time by simply replicating tasks, deliverables, timelines and assigned resources if similar work needs to be done across projects.

Autopopulate Markups

When adding expenses, purchases, software or hardware, the markups specified in your contract will automatically be populated. This saves you from manually checking the agreed markup and accelerates building cost estimates.
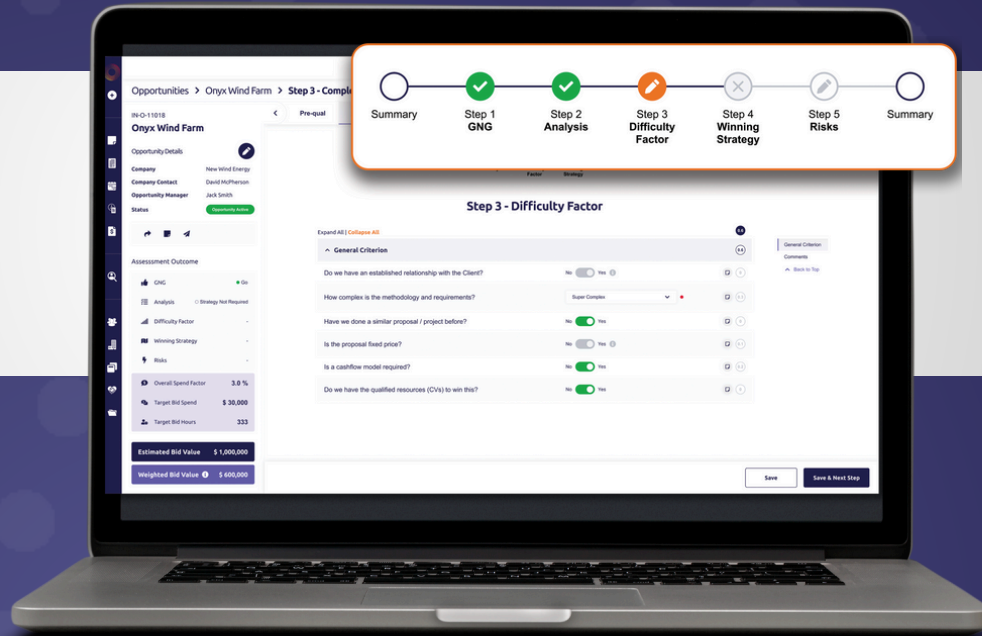
Rate Reviews

With longer projects, rates typically increase overtime. Our rate review feature lets you set new rates and so that any WIP is automatically charged to the most up-to-date agreed rate, ensuring you are getting paid the correct amount.

Resource and Project Builder

The new resource builder lets you allocate resources and specify their cost rates whilst the work hour builder lets you allocate hours for pre-defined resources to each work package enabling granular project planning.

Day Rates

The work hour builder has been further enhanced to let you select a combination of hourly and daily rates.

Delivery Module

Asset Tracking

As well as tracking assets on an hourly or daily basis, now a wider range of units of measurement are available for equipment and software tracking.

Progress Reporting

We have developed our reporting features to further reduce time spent on report writing and ensure good data quality. Using a digital reporting format, you can now create custom reports with automated elements such as S-curve graphs and tables. These can be easily shared with stakeholders via a secure link.

Project Finance

Invoicing Improvements

Invoicing is another admin-heavy task that can be complicated when dealing with a lot of different customers and therefore lacks consistency. We have completely rebuilt our invoicing feature. Proteus guides you through a number of steps to ensure the invoice is created correctly in line with customer requirements including options such as adding custom lines or applying withholding tax.

Incoming Purchase Order Risk Assessment

This feature allows you to evaluate and mitigate risks associated with incoming purchase orders by assessing factors such as vendor reliability, supply issues, contractual compliance. This minimizes disruptions and financial losses.

Alternate Project Currency

You can now manage project finances in a currency different from the default, providing a flexible and accurate solution to managing complex projects across multiple regions and project sites.

& More!

Enhanced Data Import

We have developed new import functionality so that you can seamlessly and quickly access even more data in Proteus such as proposal and project data and records for contracts and assets.

User Group Entitlements

This feature gives you control over who can access what in Proteus. You can create user groups with view-only or editing rights for areas such as contracts, companies, assets, team resources and more.

Client Credit Check

This features lets you verify potential clients. Complete a simple questionnaire to assess their risk profile and you also set standards and requirements to ensure you have sufficient information about your clients.

Client Alias Rate Table

In addition to the default DDG (department, discipline and grade) combination and named rate tables, we have developed a third rate table type whereby a DDG combination can be mapped with a client alias name, code and rate.

CRM   Sales Module   Delivery Module   ERP

APIs

We have enhanced public APIs to satisfy all common use cases to get and post data to and from Proteus and other systems.

We have also developed APIs to support specific use cases amongst customers.