Common Tasks in EMIR Standard

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This guide is intended to supplement [not replace] the Video help system for EMIR and covers the primary tasks that most users require to do. Please also watch the help videos if you are unsure of any process via Help|Help Videos option.

Key to this guide: "Find it here:" statements.
E.g. Find it here: Jobs|Quoting|Quote Reports|Jobs to be Quoted.
This is a hierarchical path to the option. In this case you need to click the "Jobs" menu, then the "Quoting" menu within it. Then the "Quote Reports" menu within the Quoting menu and finally the option "Jobs to be Quoted". These statements may also be presented in the text as Jobs|Quoting|Quote Reports|Jobs to be Quoted without the 'Find it here' text.

1. What do the Job Statuses mean?

Job statuses can be 'Active' or 'Closed' as listed below. 'Active' Statuses mean that the job requires some activity from you to get it to a final 'Closed' state.

P: *Work in Progress* [active]

The job is unfinished and ready for engineering activity. This is the default status when you raise a new job. Normally these jobs are available for work, but could also be waiting for you to produce a quote [see How do I know which jobs need to be quoted?] or could have O/S purchases against them [see How do I know which WIP jobs have O/S purchases against them?].

Q: *To Be Quoted* [active]

Jobs in this status have been declared as needing a quote but haven't been quoted yet. To get jobs into this status, simply tick the "Quote Required" box on the Main form of the job. If you untick it the job will move back out of this status to WIP. When the quote is done, the jobs will move to "Evaluation" as below.

E: *Evaluation* [active]

This indicates that the job has an Open quote against it, and shouldn't be worked on until you have received a positive response from the customer regarding the quote. Once you update the quote to show it has been accepted [by clicking the 'Accept' button on the Pages tab], the job will move back to *Work In Progress*. If the customer rejects the quote, the job will then move to *Scrapped* status [click the 'Reject' button on the Pages tab of the quote instead].

U: *Scrapped* [active]

This indicates that the job has either been completed as an 'Unserviceable' item or the customer has rejected your quote. To move a job from *Work In Progress* to *Scrapped* you must edit the job and then choose the 'Complete' button on the right hand side – choose the unserviceable option [middle option]. The job can then be Delivered and Invoiced if appropriate. Note: You should deliver and invoice scrapped jobs to remove them from the Active Jobs list or you can also 'close' them by right-clicking on the job form and 'choose close scrapped job' [when in Edit mode if no invoice is required].

F: *Finished Goods* [active]

The job has been completed as a "Serviceable" unit. The job can now be delivered and invoiced. To move a job from *Work In Progress* to *Finished Goods* you must edit the job and then choose the 'Complete' button on the right hand side – choose the serviceable option [at the top].

C: *Invoiced Serviceable* [closed]

The job has been completed, delivered and invoiced and is now closed and requires no further action. The jobs status changes from *Finished Goods* to *Invoiced Serviceable* when you press the Invoice button on the right hand side of the job form [this button is only visible when the job has been delivered and is in Edit mode].

X: *Invoiced Scrap* [closed]

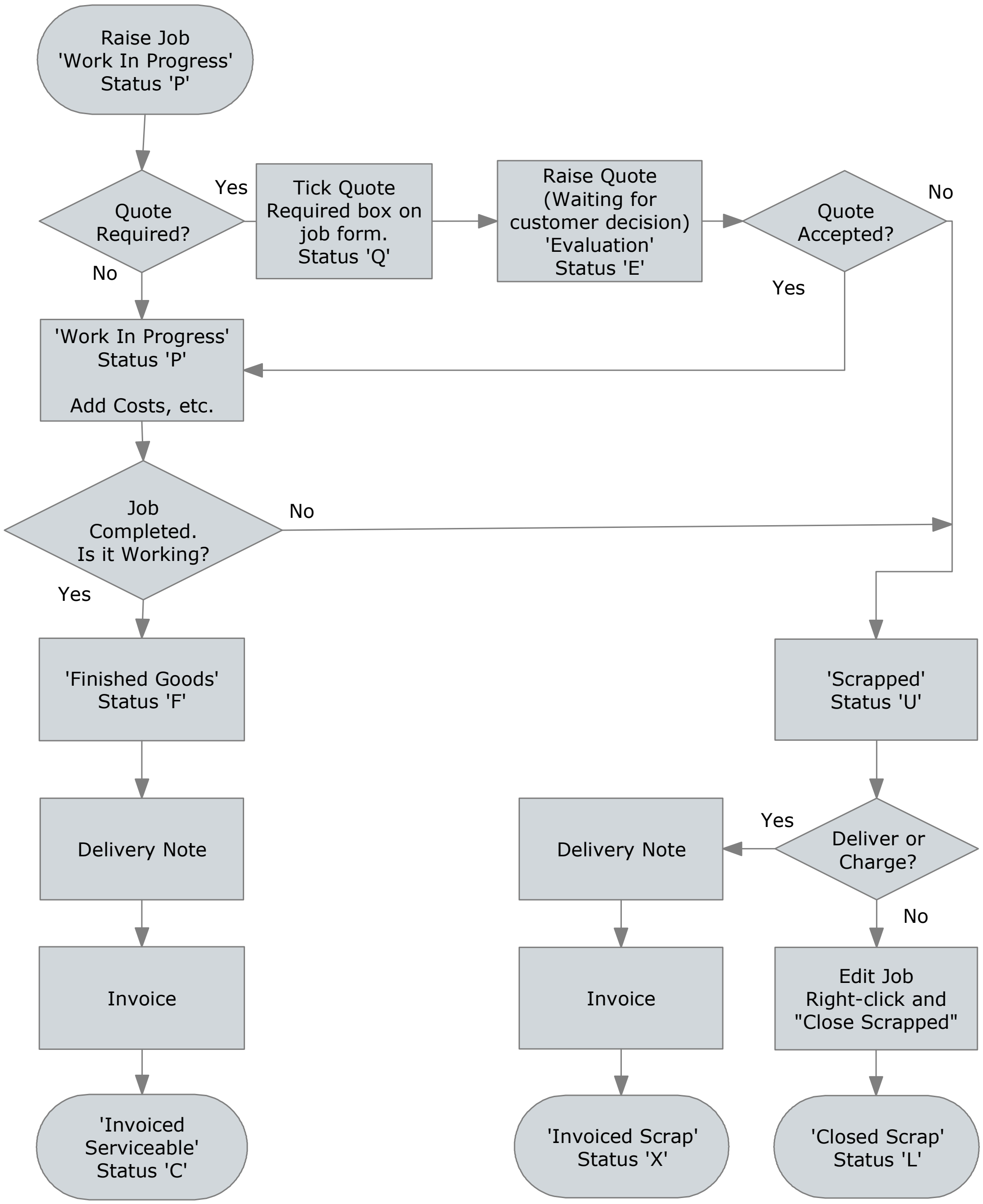
This scrap job has been completed, delivered and invoiced and is now closed.

L: *Closed Scrap* [closed]

The job has been declared unserviceable and has been closed down without the need to produce a delivery note or invoice.

2. EMIR Status Management – The flow of a Job

The following flowchart shows how a job is processed through EMIR - changing status along the way.



Use Enquiries|Active Jobs by Status and Customer enquiry to find:

- Jobs requiring engineering work – Status 'P'
- Jobs with open quotes – Status 'E'
- Jobs finished, awaiting Delivery or Invoicing – Status 'F'
- Unserviceable jobs to be closed or returned – Status 'U'
- Other optional statuses are 'Awaiting Customer' where you can change a job from WIP to Await Customer and record notes as to why it is awaiting a customer response, or 'Awaiting Spares' where you can declare a job cannot continue until a particular shortage against a part number is cleared – this is often not necessary if you use the option to raise a PO against a job instead.

3. Data Setup

Things to do before you can 'go live'
The following tasks are required before you can 'go live' with your system. Please note that the tasks are listed in the recommended order of attack, so please perform them in the order that they are listed. You only need to do the tasks associated with the modules that you have purchased.

3.1 Data set-up [Under Data menu - 'Set-Up' option]
Basic
- Enter your address info and phone numbers details, etc. into 'Company Details'.
- Set materials and labour margins.
- Set start numbers for Jobs, Delivery Notes, Invoices, Credit Notes.
- Check VAT rates are set correctly.
- Set 'Stationery Headers' on/off as appropriate against Job Cards, Invoices, etc.
- Set invoice text regarding BACS details.
- You can optionally change key fieldnames via the Field Names option.
- Set the CASH account details [if needed].

Quoting
- Set starting Quote number.
- Set introductory and closing paragraph text for Quotes.

Stock
- Set 'Usage Periods' to start this week. [We will normally do this for you]

Purchasing
- Set start PO number
- Set start GRN number [not essential]
- Set start Reject number [for Return Notes]

Nominal Ledger [NL] Finance
- Set financial periods and define financial year.
- Define NL code descriptions.

3.2 Data Loading [Under Data menu – 'Data' option]
It is best to load the following items in the order they are listed below.

Basic System
- Load all users and staff into 'Passwords'. All people who will use the system and all those whom labour will be recorded against must be added to the system. If the user is not to use the system, but is just being added for labour recording purposes, then give them priority 9 and don't tell them their password! All other users should be set to the following priorities:
    - '1' for system administrators.
    - '3' for users who need to see Financial information.
    - '4' for all users who need to do all logistic tasks [without finance].
    - '9' for users who you only want to be able to view limited details.

- Load 'Customers' [Sage import available]. When adding customers, you also need to add Contact information [on the "Contacts" tab]. If a customer has more than one site/delivery address, then these need to be added via the Delivery Address datatype [see Data|Data|Delivery Addresses]. Choose the customer and then click Add to add another delivery address. The Delivery Address 'keycode' is a unique reference for the site such as the place name or you can use postcode if you prefer. You must also enter the salesperson for the account from the user list.

- Load 'Departments' [you must have at least one department entered to be able to create a job]. Departments are revenue streams and allow you to analyse different types of work separately. Most companies have departments for Site, Sales and Workshop as a minimum, and each can post to a separate NL code [in EMIR and Sage] if required. Departments must be numbered between 1 and 50 [numeric].

- Load 'Work Done Lists' and then create 'Work Done Groups'. These are phrases to build up your quote and invoice text. E.g. A - Collect Motor, B – Dismantle, etc. Turn the phrases into Groups to make it even easier to use many of them quickly by giving the group a code and a name.

- Load 'Non-Productive Codes' if using timesheet labour recording. These are used to record the time engineers spend not working on jobs such as holidays, sickness, etc.

Purchasing

- Create 'Suppliers' – also required for the full NL Finance. [Sage import available]. Again you can also add contacts for suppliers as per customers. If you are using EMIR finance you can also enter the Invoice address to record a different Remittance Advice address and BACS details [by pressing the invoice button on the supplier record].

- Create 'Currencies' – also required for NL Finance. These are needed if you purchase in any other currency than GBP, such as USD [dollars], or the Euro [EUR]. You need to maintain the exchange rate by editing this record whenever you are going to place a foreign currency PO or receive such a purchase invoice. You also need to set the Supplier record to have the correct currency [will default to GBP].

- Create 'Account Codes' to define purchase spend. These are so you can analyse your spend, so you may want codes for Job Related, Admin, Computing, or product related such as Pumps, Motors, Bearings, etc. The code is 4 numeric digits, and the description is 15 characters.

Stock Module [Sage and Spreadsheet imports available]

- Define 'Stock Groups'. These are used to categorise parts into a group, such as BRG – Bearings, BROOK - Brook motors, WIRE – Copper Wire, etc.
- Create 'Stock Parts' – create 'Suppliers' and 'Stock Groups' first to save time. These are best loaded via electronic import from either Sage or via a spreadsheet that we can provide for you.
- Note – there is **no need** to load bin locations - this can be done via stock gain and loss options in the Stock menu or better via loading a stock import sheet.

Note: It may be possible to import data from another system – ask for details.

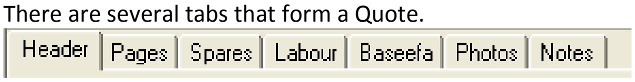
4. Quoting

4.1 How do I know which jobs need to be quoted?
Against each job there is a “Quote Required” tick box on the bottom left-hand side. If you tick this box, and there is no “Quote Reference” in the box below, then EMIR knows this job still requires a quote. In the Quoting menu [at the bottom of the Jobs menu] there is a report called “Jobs to be Quoted” which will list these jobs for you.
Find it here: Jobs|Quoting|Quote Reports|Jobs to be Quoted.

4.2 How do I raise a Quote?
There are two ways to raise Quote:

- If you are raising the quote against a known job, then it is quicker and easier to open the job [via  speedbutton] and then click the “Create Quote” on the right-hand side,
- If you are raising a quote without a job, then you can do this via the Jobs menu and the Quoting| New Quote option.

There are several tabs that form a Quote.



The ‘Header’ tab is where you choose/enter the customers’ address and contact details and any other pertinent references for the quote. There is also a ‘follow-up’ date to remind you of when the quote needs to be followed up. You can also copy one quote to another with the ‘”Save As” button at the bottom of the form. The ‘Print Acceptance sheet’ tickbox will print a page that the customer can sign and fax back to accept your quote - when it is ticked.

The ‘Pages’ tab is where you enter the text that appears on the Quote and you can choose from Work Done items and Groups by using the appropriate buttons on the right when in Edit mode. You can also add extra free-form text by using the Damage Report sub-tab under the ‘Baseefa’ tab [see below]. You can also **Print** or **Email** the Quote from this tab when in View mode. You must enter the price in the Net field on the bottom left of this tab. The job number will automatically appear in the job number box at the bottom of this form, if you have raised this from the job directly, or you can type in a valid job number to link the quote to a job at any time – though EMIR will allow you to raise a new job if the quote gets accepted and it isn’t linked to a job already. There is a “Quote closed” tickbox on the bottom right-hand side and you need to tick this [when in Edit mode] and then save it to close the quote – you will then get a choice of whether the quote is accepted or rejected by the client. You will also notice an Estimated costs line, which shows the totals of planned labour and materials as entered into the next two tabs ‘Spares’ and ‘Labour’ [see below].

The ‘Spares’ and ‘Labour’ tabs allow you to plan the costs of completing the work quoted for. You can enter planned labour and materials, to deduce the costs and charges that are required to do the work. These estimated costs do not print on the quote **unless** you tick the boxes at the bottom of the respective tabs to list them on the quote. An advantage of estimating and planning material costs, is that once the quote is accepted and linked to a job, you can purchase the listed items straight from this tab using the “Purchase” button on the left-hand side. Simply select a supplier against the items you wish to purchase, and leave the supplier blank against the items you don’t. EMIR will then raise as many PO’s as you have set different suppliers for and these purchases are shown against the job as the result of the job related purchase order that you have then raised. If you set estimated labour times, the total time is then transferred to the job on the “Technical” tab and can then be compared to actual time worked on the job via the Reports|Actual Time Report option.

The ‘Baseefa’ tab allows you to produce a differently formatted quote with more technical details to satisfy the requirements of “Ex” type repairs. Simply fill in the sub-tab ‘Tech Details’ with the necessary technical fields [they will automatically transfer from the job if they are filled in prior to the quote being created]. There are two different quote documents that can be printed by pressing the “Quote” or “Certificate” [of Conformity] buttons on the bottom of this tab. The ‘Damage Report’ sub-tab allows you to enter as much free-text as you like and has its own spell checker that is activated by right-clicking on the text area – the pop-up menu has Spelling as the first option. You can label the text appropriately, the default being “Damage Report” but this can be relabelled to “Scope of Work” or similar if the quote is for site work or similar. This Baseefa Damage Report text area will also appear on the normal quote if filled in. The information typed in here will also transfer across to the job [to the ‘Damage Report’ tab] and can then be shown on the invoice if required [see Appendix B].

The ‘Photos’ tab allows you to add photo’s that will appear on the normal Quote as printed form the Pages tab. Photo’s will be listed in two columns across the page. You can add Photo’s using the “Add” button on the left-hand side of the tab, etc.

The ‘Notes’ tab allows you to record notes about the quote for your own use. These can be used to record any ‘chase-up’ activities or any other details as to why the quote was priced as it was, etc.

4.3 How do I know which Quotes are outstanding and need to be chased?
In the Quoting menu, there is the option to “List All Quotes”. Quotes have a status of Open or Closed [when they can then be Accepted or Rejected]. Simply choose to list all Open Quotes to see those that need to be chased in. Also, all jobs that are in the ‘Evaluation’ status are linked to open quotes, so by looking at the “Active Jobs” report for Evaluation jobs only [instead of all active statuses] you can see those jobs that have a quote o/s.
<u>Find it here: Jobs|Quoting|Quote Reports|Open Quotes</u>, or
<u>Find it here: Jobs|Quoting|List Quotes to Follow Up</u> or,
<u>Find it here: Jobs|Quoting|List all Quotes</u> & choose ‘open’ quotes, or
<u>Find it here: Enquiries|Active Jobs by Status and Customer</u> – choose Evaluation jobs.

4.4 How do I close a Quote as ‘Accepted’
Edit the quote and click the ‘Quote Closed’ tickbox on the ‘Pages’ tab and then save the Quote. EMIR will then ask you to choose whether the Quote was accepted or rejected. Choose ‘Accepted’ and click OK, EMIR will then ask you if you wish to raise a job [if no job is linked] or will move the job back to ‘Work In Progress’ if one is linked.
<u>Find it here: Jobs|Quoting|Edit Quote</u> or click the “View Quote” button from the job.

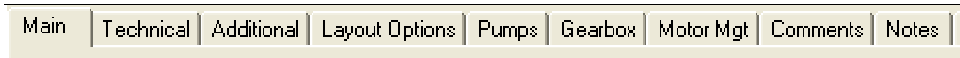
4.5 How do I close a Quote as ’Rejected’
Edit the quote and click the ‘Quote Closed’ tickbox on the ‘Pages’ tab and then save the Quote. EMIR will then ask you to choose whether the Quote was accepted or rejected. Choose ‘Rejected’ and click OK. EMIR will move the related job to the ‘Scrapped’ status, if one is linked, otherwise it will just close the quote. You can still view closed quotes – they are not deleted.
<u>Find it here: Jobs|Quoting|Edit Quote</u> or click the “View Quote” button from the job.

4.6. How can I see all the Quotes that have been Accepted or Rejected?
<u>Find it here: Jobs|Quoting|List All Quotes</u> and then choose the appropriate state.

4.7. How can I see all the Quotes raised against a Customer
<u>Find it here: Jobs|Quoting| List Quotes By Customer</u>

<u>5. Jobs</u>

5.1 How do I raise a job for an account customer?
This is done via the <u>Jobs|Raise New Job</u> option or EMIR will offer to raise a job for you if you accept a quote that isn’t linked to a job already. The tabs below are the primary ones concerned with the raising of a job [Note: Not all of them may be available to you depending on the options you have purchased].



Start by choosing the customer by clicking the next to the Customer field. The job number is chosen automatically, and the date for the order is also selected as today, but can be changed.

The ‘Main’ tab, as the name suggests, is the primary tab for the job and contains all the key information, such as the item description, customer order and references with contact information. The priority of the job and the date the job is due, along with the current job status [bottom left] are also shown. You need to select the “Department” for the job, and the delivery address that the job must be delivered back to or where the work is taking place [bottom right]. This is also the key tab for ***processing the job*** [see section 2] and you can “**Complete**”, “**Deliver**”, “**Price Job**” and “**Invoice**” the job from this tab, via their respective buttons, when in Edit mode. EMIR will only show you buttons for the options available based on the status of the job, so the ”Invoice” button won’t be available until you have completed and delivered the job first. You can also produce a “**Proforma Invoice**”, “**Create/View Quote**” and “**Print Job Card**” via the buttons on the right hand side of this form when the job is in View mode. Note: the buttons displayed will change based on the status of the job and whether you are in Edit mode or View mode.

The ‘Technical’ tab is where you can enter the volts, amps and other electrical details of the item. If you have purchased the **Winding Details Database**, you will also have buttons available to access this. You can also enter an **estimated time** for the job, or this will be populated from the estimated time planned on the Quote [that you can then revise if needs be].

The ‘Additional’ tab allows you to enter more technical characteristics of the motor, along the lines of those needed for **Baseefa or Ex Certified** work. This tab also displays who raised the job, and the full delivery address represented by the selection on the ‘Main’ tab.

The ‘Layout Options’ tab allows you to select the appropriate fields that you wish to see displayed on the Delivery note or Invoice [see Appendices A and B] for more detail. These can normally be left as set when booking in and can be amended, if necessary, later.

The “Pumps” and “Gearbox” tabs are specific to those product types and allow more detailed technical data to be held and searched upon by their own enquiries in the Enquiries menu.

The “Motor Management” tab will contain the details of the managed motor - if the job is related to a managed motor. To activate managed motors, you need to tick the box against the client to activate the scheme for the client, and then you nee to enter the details for the motors via the Motor Management data-types. When you raise a job for a managed motor client, EMIR will ask you if it is for a managed motor, as you start to raise the job, and you can then select from the list as required.

The ‘Comments’ tab is for further information related to the job. It holds info regarding “Auxiliary Unit” [did it come with a pulley, broken case, without leads, etc]; “Additional Info” text if for what the customer wants you to do or thinks is wrong with the item; “Internal comments” are for your own use, and “Delivery Comments” appear on delivery notes [they can be changed when producing the delivery note itself]. The “Auxiliary Unit”, “Additional Info” and “Comments” text only appear on the job card.

The ‘Notes’ tab is available for you to make unlimited notes as the job progresses and is for internal use only, so doesn’t print anywhere.

The following tabs can also be populated when raising the job or when updating the job [as necessary].

The ‘Photos’ tab allows you to store as many photo’s as you wish against the job for reference purposes. Simply use the “Add” button on the left-hand side to add a new photo. The simplest way to add a photo is to download the pictures from your camera to a folder on the server first [outside of EMIR], and then click the “Add” button, choose “Get Image” [ensuring that the source option on the left-hand side is set to “File”] and then browse around to the appropriate directory and select the picture you wish to add. Click “Open“ and the type a description of the photo [as required] and then click “Save” to add the picture and description to the job. It is useful to add photo’s showing the item before and after your work, and also any close up pictures of the damage to show the work that is necessary. Note: EMIR will automatically copy and save the photo to its own directory, so you don’t have to worry about where the original image is saved.

The ‘Files’ tab is used for linking any kind of file to the job. So you can link in scanned images of the customers order, letters, word documents, excel spreadsheets, balancing results, saved emails [html], etc. In short you can link any kind of electronic file to ensure any job related information is easily found and opened against the job. Note: EMIR does **<u>not</u>** copy the linked file, so it is vital that the file must be located on a shared server drive that all users can see, otherwise it may only be visible on the computer from where the link is made - which defeats its purpose somewhat!

The ‘Damage Report’ tab allows you to enter free text that you would like to appear on the invoice, providing the “Show Damage Report on Invoice” tick-box is ticked on the ‘Layout Options’ tab. If you have entered this text on a related Quote then this will copy to the job and vice-versa. The default behaviour is for EMIR to list the “Work Done” section on the invoice and not this section so you need to tick the box on the ‘Layout Options’ tab to swap from work done to free text damage report.

5.2 How do I raise a job for a “cash” customer?

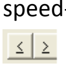
The process for raising a job is the same as in 5.1 above, but if you have set up a ‘Cash’ account in <u>Data|Setup|Set Cash Customer Code(s)</u>, and you choose this account when raising a job, you are presented with a form to fill in to capture the name, address and contact details of the customer. This alleviates the need to raise a separate account for each customer and the details that you type in are populated around the job form so that you can still search and find the job from the customer’s name. The address is stored as a delivery address against the ‘Cash’ account and this delivery address is also used as the Invoice address in this case. The best search to use to find cash jobs by the customer’s name is the <u>Enquiries|Job Enquiries|Customer & Reference</u> enquiry and choose the ‘Cash’ account. It is a good idea to standardise on how you will enter such customers’ details.
E.g. Surname, Firstname, etc.

5.3 What if I want to sell several items on the same job number?
In the case of "over the counter" sales [typically], where several small items are sold to the customer on one job number, you should set the 'Main' tab field of "Type/Desc" to say "Various Sales". Then add the items for sale on the "Spares" tab [see 5.8 below]. Once you have added the items, tick the 'Show Spares on Delivery Note' and 'Show Spares on Invoice' tick-boxes on the "Layout Options" tab. Complete the job [see 5.11] and then "Price Job" and "Deliver" and "Invoice" it – these buttons will appear in order on the right-hand side of the "Main" tab when in Edit mode. Notes:

- It is important that you ensure that the job 'Price' is equal to the 'Charges' in this case otherwise the invoice price won't add up when the items are listed, so ensure the charge price against each spares item is set correctly when you add them to the job.
- It is not recommend that you sell several motors or pumps on the same job number [or those larger items with separate serial numbers], otherwise you will not be able to track the item by the job serial number or list the technical details of the items being sold.
- Much of this functionality can be automated by having a 'sales' department and then by additionally setting the option to choose the department first when raising the job [this must be done by our support staff for you]. EMIR will then default the text, tick the appropriate boxes for you and automatically change the price to reflect the charges, as required.

5.4 How do I raise a Pro-forma invoice on a job?
Once the job is raised, a "Pro Forma" button is available on the right-hand side of the "Main" tab. Simply click this button and EMIR will print a pro-forma invoice for you – make sure you have a price in the price box though (!), and you can tick any necessary options as per those listed on the "Layout Options" tab. You can produce as many Pro-forma's as you like, so if you do forget to add the price or some necessary text, then just click the button again after you have changed the necessary details.
Find it here: Jobs|Edit Jobs & Costs and press the "Pro Forma" button on the right.

5.5 How can I update a job and change its details?

You can change most things against a job by choosing Jobs|Edit Jobs & Costs or by clicking the  speed-button. Note if you already have the job form open then you can scroll from job to job via the  buttons or click the  button to open another job. This is a much quicker way to move to another job than by opening another window.
Find it here: Jobs|Edit Jobs & Costs

5.6 How can I cancel a job?
Users with high priority [<=3] are allowed to delete jobs and this can be done via the Jobs|Cancel Job option. There should be little reason to delete jobs though as all job details can be changed. If the customer does not want a job, then you are better off scrapping the job and closing it down [see 5.11] as you will then have record of the job, whereas cancelling the job will delete it permanently.
Find it here: Jobs|Cancel Job

5.7 How do I raise purchase orders against a job?
There are two ways to raise purchases against a job:

1) If the job has a Quote that lists the items that need to be purchased on the "Spares" tab, then use the "Raise PO" button on the spares tab via the quote to raise the PO. You can then choose a supplier for each item that you wish to purchase [see section 4.2 for more details].
Find it here: Jobs|Quoting|View/Edit Quote.

2) If the job doesn't have a quote, or you need to purchase additional items not quoted, then simply raise a PO for the job from the Purchasing menu via "Generate New PO". Make sure you have the job number to hand though!
Find it here: Purchasing|Generate New PO.

5.8 How do I record materials onto a job [that are not purchased]?
To record stock or 'freehand' material items onto a job, simply edit the job and move to the "Spares" tab. There is a menu along the bottom for you to Add, Edit and Delete stock and freehand material

items. Note: You cannot record stock items against jobs if you don't have actually them physically in stock!
Find it here: Jobs|Edit Jobs & Costs and move to the "Spares" tab.

5.9 How do I record Labour on a job?
Labour is normally recorded via 'timesheet' method by using the option "Labour Costs" from the Jobs menu. Simply choose the person from the drop down list on the top left and the date in the field at the top right. There is a menu along the bottom for Adding, Editing and Deleting labour. AS you add labour, simply put the job number in the first box and then the hours at Time [T1], Time and a half [T2] and Double-time [T3]. If the labour is non-productive, simply enter the code in the job number box, such as HOLS, SICK, etc.
Find it here: Jobs|Labour Costs.

5.10 How do I enter text on the job so that it appears on the Invoice?
You can add text to describe the work you have done to the job in two places – the "Work Done" tab [the default] and the "Damage Report" tab [need to tick an option on the "Layout Options" tab for this to show]. For full details of which data will print on the Invoice please see Appendix B. The "Work Done" tab is the default place and you can make use of work done phrases and groups [see buttons on the right-hand side of this tab] to make this process easier [see section 3 for details of how to create these phrases and groups]. You can also enter lines of text free hand into the 14 lines of text available.

The "Damage Report" tab allows entry of free text and has its own spell checker [activated by right-clicking on the text area]. You can re-label Damage Report to be whatever you require and you need to tick the option in the "Layout Options" tab to display this text instead of the work done text.
Find it here: Jobs|Edit Jobs & Costs and move to the "Work Done" tab.
Find it here: Jobs|Edit Jobs & Costs and move to the "Damage Report" tab.

5.11 How do I declare a job complete and make it ready for despatch?
To declare the engineering work on the job complete, whether to say it is working [serviceable] or beyond economical repair [unserviceable], you need to edit the job and click the "Complete" button on the top right of the main job form. You then get the options to declare it serviceable or unserviceable. Jobs declared serviceable move to status 'F' [Finished Goods], while jobs declared unserviceable move to status 'U' [Scrapped].
Find it here: Jobs|Edit Job and click the "Complete" button on the right-hand side.

5.12 How can I put a job back into Work In Progress if I have completed or scrapped it by accident?
Find it here: Data|Utilities|Job Administration|Return Job to WIP
Simply enter the job number in this option and, providing the job is in a suitable status, it will then be transferred back into "Work In Progress" for you. This option is limited to high priority users only.

5.13 How can I close a scrapped job without needing to deliver and invoice it?
This can be done for jobs in status "U – Scrapped" jobs only. Simply edit the job and right-click anywhere on the job form. A menu will then appear and you can then choose the 'Close Scrapped' option. The job will then be moved to "Closed Scrap" status with both dummy delivery note and invoice numbers – see section 2 for full description of statuses. Note: Only use this option if you don't want to deliver the job or charge the client.
Find it here: Jobs|Edit Job, right-click and choose the "Close Scrapped Job" option.

5.14 How do I raise a Delivery Note for a job?
The job status must be "F - Finished Goods" or "U - Scrapped" before a delivery note can be raised [unless other system options have been set to allow despatch from "P - Work in Progress"]. Simply edit the job and a 'Deliver' button will appear on the right-hand side of the "Main" tab. If the button isn't visible then the job is not in the correct status to allow despatch – you normally have to complete the job first [see 5.11].
Find it here: Jobs|Edit Job, and click the "Deliver" option.

5.15 Can I change/re-print a Delivery Note?
Yes. All the text and information on the Delivery Note can be edited and a re-print taken simply by clicking the Deliver button again. EMIR will recognise it is a re-print and keep the same delivery note number, etc.
Find it here: Jobs|Edit Job, and click the "Deliver" option.

5.16 How do I raise an Invoice on a job?
The job must have been declared complete and delivered before an invoice can be raised. Simply edit the job and an 'Invoice' button will appear on the right-hand side of the "Main" tab. If the button isn't visible then the job is not in the correct status to allow invoicing. Find it here: Jobs|Edit Job, and click the "Invoice" option.

5.17 How can I change the date of an Invoice once it has been raised?
This can be done via a utility, which will update the job and the necessary financial files with the date you require.
Find it here: Data |Utilities|Finance Administration|Update invoice date

5.18 Can I change information on an Invoice once it has been raised?
In short, the answer is 'yes'. You can change all the text, and price, etc except for the invoice date [see above]. The only proviso being that you cannot change the invoice if you are in a different financial month [for users with Full Finance] or if you have already posted it to Sage [for user with Sage interface]. It is also not a good idea to change an invoice once it has been sent to the customer! EMIR will let you re-print an invoice, and update the necessary financial files, by simply clicking the invoice button again on the job in Edit mode.
Find it here: Jobs|Edit Job, and click the "Invoice" option.

5.19 Can I still add costs to a job once I have Invoiced it?
Yes. EMIR will warn you that you are adding costs to an invoiced job, but it will allow you to do it. The status of the job is also shown on the PO, on the "Additional" tab, if you are raising a job-related PO, so this also warns the user of the job status before raising a PO.

5.20 What are Split Jobs used for? Projects and Split Delivery!
Split jobs are effectively a way to make sub-jobs in a project situation. This allows you to have a master job [E.g. 12345] and split it many times to create sub-jobs [12345/A, 12345/B, etc. Each job is a job within it's own right, and can be priced, delivered and invoiced separately, but they can also be analysed collectively with the Split job Costing Report in the Reports menu. This is also a way to split deliver items.
Find it here: Goods Out|Split Jobs

6. Stock Management

6.1 How do I create stock items?
Find it here: Data|Data|Stock Parts
Fill in the form provided. Part numbers are limited to 20 characters and Descriptions to 50 characters. They can also be imported from Sage Line 50 or loaded via an Excel spreadsheet interface [ask for details].

6.2 How do know whether a part I have is in stock?
Find it here: Stock|Part Stock Summary
This will show a stock profile including how many are in stock, how many are on order, etc.

6.3 How can I set Minimum and Maximum levels of stock by Part number?
Find it here: Data|Data|Stock Parts
The min and max fields are at the bottom of the form.

6.4 How can I see which items are below minimum stock?
Find it here: Stock|Generate Recommendations
Then print a list here: Purchasing|Purchasing Reports|PO Recommendations

6.5 How can I easily order all my items below minimum stock?
Find it here: Stock|Action Recommendations
You can accept, reject or change the quantity that EMIR recommends you order for each item. It is vital though that each part has a known supplier in the Data| Data| Parts record.

6.6 Can EMIR recommend how much of each stock item I should hold?
Find it here: Stock|Parts Usage Analysis [creates the info – run this weekly]
Find it here: Stock|Part Stock Summary [view on the Usage tab]

6.7 What if the stock on EMIR isn't what I have in the Bin Location?
Find it here: Stock|Stock Gain and Loss

Stock gain will increase the stock level on EMIR, while Stock Loss will reduce the stock level.

6.8 How do I perform a stock check? What reports are there to help me?
Find it here: Stock|Inventory Reports|Stock Check Report
Adjust stock via: Stock|Stock Gain and Loss

6.9 How do I see what stock transactions have been done?
This report shows all the stock gains, losses and usages [on jobs] for a part number or for all parts in date range.
Find it here: Stock|Inventory Reports|Stock Transactions Report

7. Purchasing Management

7.1 How do I raise an Order?
Find it here: Purchasing| Generate New PO
Fill in each tab in turn:

- The 'Header' tab holds your Delivery Address [which will default to your company address but can be changed], how you are placing the order [phone/fax/email, etc.], and a "Required Date" for the overall order [this is not the date used to decide whether items are overdue though, but it is the one that displays on the printed order]. "Notes 1" appears on the bottom of the printed PO, but "Notes 2" is for internal use only. The "Value" field is not editable, as it will total the value of the items on the 'Items' tab. You can also 'Cancel' the PO, if no items have been received, using the button at the bottom of the form.
- The 'Items' tab is where you add/change/remove the items for purchase using the "Add", "Edit" and "Delete" buttons at the bottom of the form. You can also make reference to an Engineer or Job, and register an Invoice has been received, against the item when adding/editing an item. Note: The "Complete" button should **NOT** be used to receive goods as it actually cancels any outstanding items, and should only be used to close down a PO if the items are no longer required.
- Notes tab. There is a Notes section per item on the order and these text notes will print directly under the respective item on the PO, so if you require extended description of the item to be purchased, then this is where you enter the additional details.
- The 'Additional' tab is where the user can:
  - Add a carriage charge,
  - Tick a box to declare the items ordered to be delivered to the site address of the job, and
  - See the status of the job and whom the job is for.

7.2 What kind of items can I order?
You can order Stock items as per Data|Data|Stock Parts that have been linked to the chosen Supplier, or you can enter 'Miscellaneous' [or freehand] items where you type in the info as you need. Only stock items will increase stock when they are received, freehand items have no effect on stock holdings [they are intended for ordering consumables, paper, etc].

7.3 How do I know which PO items are due or overdue?
Find it here: Purchasing|PO Enquiries|View Outstanding PO's by Supplier
Each item on a PO has its own due date [see the 'item' tab and add/edit the item to view the "Required Date"] and this what EMIR uses to decide whether it is just 'Outstanding' or actually 'Overdue'.

7.4 How do I record that items have arrived?
Find it here: Purchasing|Receive Goods
Simply record the quantity of each item that you have received and the Supplier's delivery note number.

7.5 How do I reject/return goods to the supplier?
Find it here: Purchasing|Reject Goods
Enter the PO and then choose the delivery that the item was received on. Enter the quantity you are rejecting and the reason why. EMIR will produce a Returns Note for you to send back with the goods to the Supplier. You can also record whether it was the Supplier's fault or not.

Note: you must receive the goods before you can reject them!

7.6 How can I see all the PO's that have been raised?
Find it here: Purchasing|PO Enquiries|List PO's

7.7 How can I see all the PO's raised for a particular part number?
Find it here: Purchasing|PO Enquiries|View PO's for a Part

7.8 How can I see all the Suppliers that I've bought a particular item from?

Find it here: Purchasing|Part Enquiries|Part Number Fuzzy Match
This allows you to search on a key word if you don't know the exact part number.

7.9 What other useful reporting is there to help me with Purchasing?
Find it here: Purchasing|PO Reports

You can print all the goods received or rejected, look at supplier spend, check on overdue orders, etc. from this menu.

7.10 How can I tell if my PO goods have been received on EMIR?
There are several ways to check. You can view the PO and look at the "O/S Qty" column has any value [a quantity of 0 means that nothing is outstanding]. You can also check the status of the PO item by using the List PO's option and it will show as 'Completed' [in the last column] if the PO has been fully received.
Find it here: Purchasing|Amend PO and move to the "Items" tab, or
Find it here: Purchasing|PO Enquiries|List PO's and look at the 'Status' column

If the item is ordered for a job, the "Spares" tab will list all the items and PO items will start with PO in the "Who" column. Each PO line on the spares tab will have a status in the end column, this will be either 'o/s' if outstanding, 'Recd' if received, and 'Invd' if an invoice has been logged against the PO item [see below].
Find it here: Jobs|Edit Job and look at the status column on the 'Spares' tab.

7.11 How can I record Purchase Invoice details against the PO?
The best way is to use the EMIR Purchase Ledger functionality to record the invoice details against the PO, and EMIR will check to see if:

- The goods have been received
- The value of the PO and the invoice are the same
- No other invoice has been logged against the PO.

If these checks are satisfied, then the invoice will be approved, otherwise EMIR will inform you of why the invoice cannot be approved. You can still log the invoice [without approval] and come back to approve it later. If the invoice is approved, then the details are entered against each PO item and EMIR will show the status of each PO item as "Invd". This status is necessary as it is used when calculating "Financial WIP" as per the "WIP at Date Report" in the reports menu.
Find it here: Purchase Ledger|Add/Approve Supplier Invoices

You can also choose to edit each PO item instead and fill in the invoice details by hand, but this is less efficient.
Find it here: Purchasing|Amend PO

8. Enquiries and Reporting

8.1 How do I know which jobs can be worked on?
How do I know which jobs have O/S purchases against them?
The enquiry "Active Jobs by Status and Customer" has a column on the far right that is labelled "O/s PO's". If there is a 'Y' in this column then there are o/s purchase orders against the job, if it is blank, then there are no current o/s PO's against the job so either all goods have been received or no PO's have been raised. This enquiry, as all enquiries, can be exported to Excel by using a right-click on the enquiry grid, or you can print this via use of the print button on the bottom left of the screen.

This report shows all the Active Statuses, so "Work In Progress" jobs are the ones that require engineering work to complete them to "Finished Goods" [serviceable] or "Scrapped" [unserviceable] status. "Evaluation" jobs require that the Quote is accepted/rejected first before further engineering time is spent on them. "Finished Goods" jobs require delivery and invoicing to get them to a closed status. "Scrapped" jobs can be closed [see 5.13] or delivered and invoiced to moved them to a closed status. Find it here: Enquiries|Active Jobs by Status and Customer.

8.2 How do I know which jobs require Delivery or Invoicing?
"Finished Goods" jobs require both delivery and invoicing to get them to closed status. There is dedicated enquiry that tells you which jobs need delivering or invoicing in the Goods Out menu called 'Items Ready For Action'. Choose all Customers by ticking the "All Customers" box on the customer selection dialogue. The enquiry has a column labelled "Action" and this will be 'D' if the job requires delivery or 'I' if the job needs to be invoiced. You can double click on each job in turn to open the job, choose Edit, and then the appropriate 'deliver' or 'invoice' button will be available. Note: A job must be delivered before it can be invoiced.
Find it here: Goods Out|Items Ready For Action, or
Find it here: Enquiries|Active Jobs by Status and Customer [for Status 'F'].

8.3 How can I see the overall labour timesheets for all my staff?
The report 'Time Sheet Report' in the 'Reports' menu will show labour for one engineer or all, and for a date range. This should ideally be run weekly to check that the hours being paid to staff by payroll match the hours recorded on EMIR. E.g. If you pay Joe Bloggs 40 hours per week, but he only has 28 hours recorded on EMIR, then you know you are missing 12 hours of labour that hasn't been recorded correctly.
Find it here: Reports|Timesheet Report.

8.4 How can I see a list of every job we have booked in [for a date range]?
This overall job list, for a date range, is available in the "Workshop Bible" enquiry. This enquiry shows each job, in booked in sequence, for the date range entered.
Find it here: Enquiries|Workshop Bible.

8.5 How can I review the profitability of all invoiced jobs?
The report 'Profitability Report" in the 'Reports' menu, list all jobs invoiced in a date range, grouped by their department, and shows the job costing profitability for each job invoiced and for the department and company overall.
Find it here: Reports|Profitability Report.

8.6 How can I see a list of all the jobs I have invoiced in a period?
There are many ways to see this information:
Find it here: Reports|Profitability Report. This groups by department.
Find it here: Enquiries|Job Details Enquiry and choose Status 'C' jobs.
Find it here: Reports|Status Print for status 'C' jobs. This groups by customer.

8.7 How can I see how active my customers have been in a 12-month period?

Find it here: Reports|Customer Activity Report

This report shows you, for any 12-month period, how many jobs each customer has had in the month, and the value invoiced each month. There is also the total revenue for the period and the percentage of business each client has contributed for that period. There are options to narrow this down by salesperson – this is tracked by the salesperson entered against the customer record in Data|Data|Customers, and to only look at key customers – which allows you to specify a minimum percentage of your business that the client must have before they are included on the report.

8.8. How can I get a value of my Financial 'Work In Progress' at a date?

Find it here: Reports|WIP at Date Report

This report works out true WIP for any given date. It only includes purchase spend if the PO has had an invoice against it at the time when the WIP is required.

8.9. How can I see which customers are the most profitable?

Find it here: Reports|Profitability by Customer Report

This report provides a one line summary of activity per client in the period required. Chose status 'C' to see the profitability from Invoiced jobs only.

8.10 How can I compare Estimated time to Actual time on jobs?

Find it here: Reports|Actual Time Report.

Estimated time can be entered onto a job via the 'Technical' tab on a job. This is also filled in if you plan labour on a quote linked to a job.

8.11 How can I find unprofitable jobs?

Find it here: Reports|Unprofitable Jobs.

This report will analyse all the jobs in the period specified and list those jobs that have been priced lower than the costs accumulated.

8.12 How can I check who has processed a job?

Find it here: Enquiries|Audit Trail.

The Audit Trail keeps track of who does any activity on a job, from booking it in to adding materials, recording labour, creating delivery notes and invoices, etc. In short you can track all the processing activity for any job. This may be helpful in identifying the training needs of users - if mistakes are being made consistently.

8.13 How can I see how quickly we are processing jobs?

Find it here: Enquiries|Turnaround Times

This enquiry will show you either the time from booking in to dispatch of jobs back to customers, or the time between despatch and invoicing. The first is normally a measure of work practices; the second is normally an admin measure. The enquiry will list all jobs in the period with all the key dates against each job and the turnaround time of each. An average is provided for each measure also.

8.14 How can I find all our ongoing jobs where we don't have an order number?

Find it here: Enquiries|O/S Jobs with PO

This enquiry will list all the jobs currently in an active status, where you don't have an order number from the customer. This obviously identifies those jobs that need to have an ordered number secured.

8.15 How can I see all the jobs for a known manufacturer seen for a client?

Find it here: Enquiries|View Jobs By Manufacturer

This enquiry allows you to choose a client and then compiles a list of all the manufacturers seen on items for that client. You can then see all the jobs for any of those manufacturers by choosing from the compiled drop-down list.

Appendix A. Which fields appear on Delivery Notes?

Always

The following fields will always appear on Delivery Notes providing they are filled in:

Fields from the ***'Main'*** Tab:

- ✓ Customer's Invoice Address [set against customer record]
- ✓ Customer's Delivery Address [drop down list if there is more than one]
- ✓ Customer's Order Number
- ✓ Customer Reference
- ✓ Collection Reference
- ✓ Despatch Date and Delivery Note Number [auto generated]
- ✓ Manufacturer
- ✓ Type/Description
- ✓ Serial
- ✓ Frame
- ✓ Job Price [optional]

Fields from the ***'Technical'*** Tab:

- ✓ Volts
- ✓ Amps
- ✓ Herts
- ✓ RPM
- ✓ HP/KW

Fields from the ***'Comments'*** Tab:

- ✓ Delivery Comments [2 lines]

Optional Fields

You can optionally also show the following information by ticking the appropriate boxes on the '***Layout Options'*** tab:

- ✓ Spares Part Number / Description for each item on the ***'Spares'*** tab
- ✓ Work Done lines that are entered on the ***'Work Done'*** tab.

Appendix B. Which fields appear on Invoices?

Always

The following fields will always appear on Invoices providing they are filled in:

Fields from the ***'Main'*** Tab:

- ✓ Customer's Invoice Address [set against customer record]
- ✓ Customer's Delivery Address [drop down list if there is more than one]
- ✓ Customer's Order Number
- ✓ Customer Reference
- ✓ Collection Reference
- ✓ Despatch Date and Delivery Note Number [auto generated]
- ✓ Invoice Number and Date [auto generated]
- ✓ Manufacturer
- ✓ Type/Description
- ✓ Serial
- ✓ Frame
- ✓ Job Price [optional]

Fields from the ***'Technical'*** Tab:

- ✓ Volts
- ✓ Amps
- ✓ Herts
- ✓ RPM
- ✓ HP/KW

Data from the '***Work Done'*** tab

- ✓ Each line that is filled in will show on the Invoice - unless you choose to list materials from the '***Spares'*** tab or the Damage Report text. [see below]

Optional Fields

You can optionally also show the following information by ticking the appropriate boxes on the '***Layout Options'*** tab:

- ✓ Spares Part Number / Description with/without prices for each item on the ***'Spares'*** tab. Note this will display instead of the Work Done information.
- ✓ Damage Report text – this will display instead of the Work done information.