

Getting the most out of EMIR

Introduction

This document is written to provide a checklist of activities and reporting that will ensure that you use EMIR fully and get the most out of EMIR for your business. By ensuring that the following activities are completed, you can be sure that EMIR is working for your business and providing the ultimate management tool to help you run your business successfully.

This document will take each section of the system in turn and explain the key tasks that need to be done, and the key information that you should use to help manage that section of your business. If you are not doing some or all of these tasks then you can be sure you are missing out on an area of control for your business!

1. Jobs

The following tasks and activities should be being done to ensure you are getting the best job management information for your business.

Description of Task/Activity	Tick
Raise a unique job for each item that arrives ASAP and enter the information as completely as possible into the job tabs.	
Get into the practice of taking photo's of jobs as they arrive and add these into the appropriate tab on the job form.	
Store any external documentation about the job against the job by using the Files or Photo's link. The photo's link is the ideal place to scan in other documents, such as test sheets, job cards, winding specs, etc. as they are then visible as a picture against the job and can be easily found and reprinted etc. The Files tab will allow you to link to any other electronic file and open it from within EMIR [providing the PC you are using has the necessary application to open it with!]. This will ensure all the information necessary to the job can be easily found and retrieved without the need to go hunting for paperwork!	
Book warranty jobs into a separate Warranty department. Use the split jobs option to book in the warranty work as a sub-job of the original work, and set the department to Warranty. This way you can analyse the total cost of the 'project' [the master job and the warranty sub-job] and you can also then analyse all warranty work by using any of the enquiries with a department filter, such as the Profitability report to analyse invoiced jobs, or the Active Jobs Enquiry to see ongoing Warranty work.	
Ensure that Labour and Material costs are captured against jobs ASAP. EMIR is a live information system, but if you are only capturing costs at the end of the job, EMIR cannot show you how a job is progressing or give you accurate WIP value.	
Ensure that the Timesheet Report from EMIR is used to provide the payroll data. This will mean that EMIR will actually reflect the full hours that your staff are being paid - both productive and non-productive. This is an essential cross-check.	
<p>Run the "Active Jobs Enquiry" daily and remove any 'dead' jobs. In particular:</p> <ul style="list-style-type: none"> • Complete or Scrap jobs from status 'P' that are no longer in progress. • Ensure status 'U' [Scrap] jobs are closed or invoiced off the list ASAP. • Ensure status 'E' jobs really have an o/s quote or close the quote down. • Ensure status 'F' jobs are delivered and invoiced ASAP. <p>This enquiry is your active order book of work, and letting it get clogged up with 'dead' or inactive jobs will make this information bloated and less useful. This is the essential enquiry to enable you to manage your ongoing work, so look after it and monitor it daily to keep on top of your workload.</p>	
For a snapshot of jobs that require engineering active activity [Status 'P'], run the 'Next Job' enquiry to find the next job due out by priority and date due, and see any overdue jobs.	
To find jobs that require Delivery or Invoicing, run the 'Items Ready For Action' enquiry, and do this daily to ensure you invoice ASAP after the job is completed.	
Analyse 'Unprofitable Jobs' on a weekly basis or at management review meetings. Compare the jobs to their quotes to see where things have gone wrong.	

Solutions in I.T. Ltd

2. Quoting

The following tasks and activities should be being done to ensure you are getting the best quote management information for your business.

Description of Task/Activity	Tick
Ensure that all jobs that need to be quoted are ticked to reflect this.	
Run the 'Jobs to be Quoted' report frequently [at least once a day] to see which jobs need a quote. Don't let opportunities slip by!	
Ensure all Quotes, including verbal quotes, are recorded as a quote in EMIR. Raise the quote from the job via the 'Create Quote' button if there is a job, or from the Quoting, New Quote option if there isn't a job to quote against [supply only].	
Add Photo's to Quotes where possible, as a picture adds to the overall impression and 'wow factor' of the quote.	
Make sure you update EMIR ASAP when a Quote has been accepted or rejected by the customer. Look at the 'Open Quotes' enquiries and reporting on a daily basis, and close any quotes that are no longer active. If the quote is for a job and has been rejected, make sure you also invoice or close the job down once you have rejected the quote. [See the Active Jobs Enquiry in section 1].	
Similarly, run the 'List Quotes to Follow Up' if you have the ability to set a date for review against a quote. Run this daily to see the quotes that need following up that day and keep on top of your o/s quotes.	
Record any conversations with the customer regarding the quote in the quote Notes tab. This will make it easier for others to be able to pick up what stage the quote is at if the raiser is not available.	
Check the totals of quotes raised in the month, as a guide to how your business is progressing. Look at how many are accepted and rejected and try and record reasons for rejections in the Notes against the quotes.	

3. Purchasing

The following tasks and activities should be being done to ensure you are getting the best purchasing management information for your business.

Description of Task/Activity	Tick
Ensure all orders are raised as quickly and completely as possible and do not leave the price of any items as 0.00 if at all possible!	
Ensure that you set a realistic date required against <u>each item</u> . This is particularly relevant if raising a freehand [miscellaneous] item. This date is used by EMIR to monitor when items are overdue, so it will be of no use if the dates aren't entered realistically.	
Use the Outstanding and Overdue enquiries daily to keep on top of items that are due in or are now overdue. Additionally, run this for a supplier and export it to Excel so you can email the list of items to the supplier to make it quicker and easier to chase o/s or overdue items.	
Always record that goods have been received as soon as they arrive. Make sure the person who received the goods has access to EMIR. Only if goods are received accurately, will the reporting and enquires within EMIR be accurate.	
Ensure that any items rejected, and done through EMIR. Not only will EMIR create the paperwork for you to send back with the goods, but it will also then decrement stock [as appropriate] and also know that those goods are again outstanding.	
Record receipt of the Invoice via the Purchase Ledger, as EMIR will check that the Invoice and the Order are for the same value and that all goods have been received before approving. This will mean that many orders can be approved instantly saving a huge paper trail around the building!	

Solutions in I.T. Ltd

4. Stock

The following tasks and activities should be being done to ensure you are getting the best stock management information for your business.

Description of Task/Activity	Tick
When loading stock or doing a major change of quantities, parts or bins, make use of our 'csv' interface to load bulk data quickly and easily. You can completely reset stock levels this way.	
Record stock usage on jobs ASAP, after the materials have actually been issued. This will ensure that your stock levels are current and that you can rely on the EMIR stock picture instead of going and physically checking stock locations for stock availability!	
Run 'Part Usage Analysis' on a weekly basis, the same time each week. A good time is Monday lunch-time. This will analyse your stock usage and set min and max levels for stock based on what you are using. If you have set manual levels then these will not be used unless you reset manual levels back to '999999'.	
Run 'Generate Recommendations' about 3pm every day, as this will then review any stock shortfall based on min levels. Action the recommendations to order any items required without the need to type out the PO!	
Perform stock checks as necessary, particularly for the faster moving items or stock groups.	
Adjust stock by using the stock gain and loss facility as soon as a discrepancy is found. Also, make use of the 'transfer' option if you move stock from one location to another [including vehicles].	
Use the bad stock option to hold any items reclaimed. These items have no value on the shelf but can still be charged if used on jobs.	

5. Finance

The following tasks and activities should be being done to ensure you are getting the best financial management information for your business.

a) Sage

Description of Task/Activity	Tick
If you are using Sage, ensure you export Sales Invoices to Sage on a regular basis. Make sure you maintain the customer account codes correctly though and that your Sage NL codes are set correctly by department within EMIR. Export Purchase Invoices also to ensure that EMIR knows which PO's have had invoices and so it can accurately give WIP information.	

b) Full Finance

Description of Task/Activity	Tick
Make sure you label any NL codes you use via the Maintenance section.	
Ensure the bank is reconciled frequently, at least once a week.	
Ensure all payments are made and received as they occur.	
Use the Suggested Payments list to identify those suppliers who need paying.	
Use journals to process Wages and other items where no invoice is provided.	
Use the Month End Checks to ensure that no errors have occurred and that the finance system balances. The quicker you identify any issues, the faster it is to solve them [as there is less data to analyse].	
Don't just go into the Period End routine at the end of a period! You can enter this section and post on a daily basis if you wish to check on how the business is performing. Only by posting can you see the current P&L, Balance Sheet, etc. You should enter here at least weekly to check on the progress of your business.	
Make sure you run all the necessary reports every month as per the Finance Training Guide.	
Make sure you run a 'Floppy Copy' backup up of your financial data before rolling period as this will then allow you to go back to this period if you find something is wrong later.	