

EMiR

Electro-Mechanical Information Resource

OPEN DAY 2024



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Welcome to the EMiR Open Day 2024



Welcome!



Thank You!



Housekeeping



Meet the Team!

Today's Agenda...

10:00	Introduction	Gary
10:10	Key Note Speaker: Michael Caulfield	MC
11.00	Coffee & Networking	All
11:30	The EMiR Journey Continues	Geoff
11:50	EMiR Development and Support update	Gary
12.30	Focus on Finance - EDFG	Annette
13.00	Lunch	All
14:00	EMiR SaaS Demonstration	Geoff
15.00	End of Presentations	All
15.30	5-a-side Football!	All

Keynote Speaker

Michael Caulfield Sports Psychologist



Break Time!



Welcome Back!



The EMiR Journey Continues



Geoff Perkins
Managing Director



Highlights since we last met



Support



Who are we and what have we been up to?

Quick recap – CSL acquired SIIT in May 2022

A lot of behind-the-scenes work!

- FHG incorporated into CSL's operating model
- Unified support team
 - One team, Josh Bottomley leading
 - Recruitment
 - 4 full-time members of staff
 - Connor, Ionut & Dan (Apprenticeship)



Moving Forward

Our Commitment to Maintaining & Enhancing EMiR

New Focus on Finance!

1



New Enhancements!

2



New Customers!

3



INTERSEL DOWDING AND MILLS FZCO
Because the world rotates

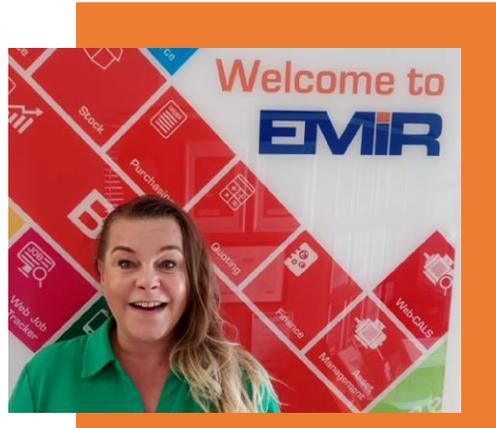




New Roles in the Business



Annette Boulter
Training & Software
Consultant



Kirstle Davies
Group Marketing
Manager



Gary Downes
EMiR Consultant

Development & Support Update

Gary Downes EMiR Consultant



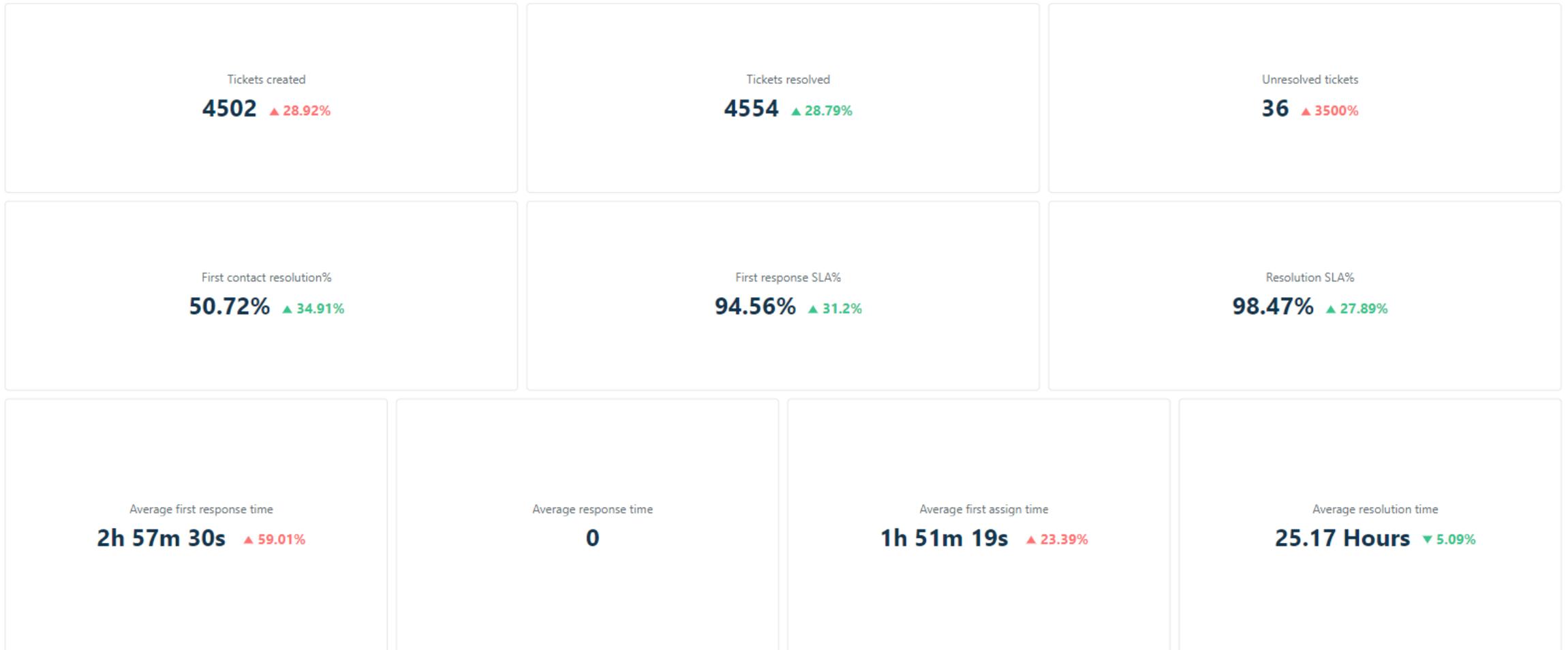
Development and Support Update

- Nearly 2 years since our last open day!
- 4,500 development hours, so 188 hours per month
- 1,000 development jobs completed, 42 per month
- 3,100 support hours, so 129 per month
- We develop EMiR Professional every day!



Support Tickets

Last 12 months



EMiR Professional Software Overview



EMiR is now a suite of 16 Modules and Extensions that cover many areas of your electro-mechanical business plus 4 services to help support, maintain, backup and host your system.



Recent Key Developments

- Multiple Assets per Job [120 hours]
- Asset Contracts [30 hours]
- Export Assets (for re-import) [12 hours]



Asset Management



Recent Key Developments

- Time bands extended to T5 - T8 [93 hours]
- Non-conformance reporting [45 hours]
- Internal “trigger” emails sent via SMTP [12 hours]*
- CIS Invoice changes for labour deductions [16 hours]
- Siemens interface [36 hours]
- RAMS – coming soon.

*Requires additional setup!



Recent Key Developments

- Foreign currency enhancements [160 hours]
- Sage 200 Export updates [80 hours]
- QuickBooks export – [13 hours]
- Balance sheet by Branch [24 hours]

Upcoming:

- EDFG inspired Finance Improvements



Finance



Recent Key Developments



- Purchasing Carbon Reporting [22 hours]
- Choose supplier with Recommendations [11 hours]
- Subcontractor mods [70 hours]

Purchasing



Recent Key Developments



- Quote Approval [18 hours]
- Repair Quote options around materials [67 hours]

Quoting



Repair Quote Options

EMiR Professional 2023 [Logged in as: SYSTEM] - [View/Edit Quotation]

File Favourites Quoting Sales Order Processing Jobs G

Job Job Cost Search CUSTOMER

Quote No.: 51285 Customer: UPMC
Revision: 4 Status: Open
Quote state: Not selected

Header Pages Conclusions/Recommendations Notes Photos Other info Files

Details Repair type Engineer Report Spares Labour

Add Option Delete Option

Option 1 | Option 2

Option: Replace original pump with pump of similar type Show on quote: Yes
Est. despatch: Within 7 days of order Favourite: No

No.	Date	Who	Part Number	Qty	Cost Each	RRP Each	Discount %	Margin %
1	30/05/2023	SYSTEM	CHOP212342	1.00	450.00	875.00	0.00	

Option status: Open Cost: 450.00 Charge: 875.00 Margin: 194.44%
GBP Costs: 450.00 GBP Chg: 875.00 Margin: 194.44%

Hide Part No's:

Add Edit Delete Transfer Add BOM Insert Up Down Item Text

New mail message(s)...

EMiR Professional 2023 (c) FHG Software Ltd/Solutions In I.T. Ltd Ralspeed Ltd : 18/04/2024

Recent Key Developments

- Stock part approval [34 hours]
- BOM version control [14 hours]
- VLM integrations [100's of hours]



Stock



VLM

- Vertical Lift Module
- In use at Torishima (Dubai)
- Stock “vending” machine
- Also similar machines now in use at Cabel and Rotamec too.



Recent Key Developments

- Reject Quote via CRM
- Late payment warnings update
- Show merged Quote in CRM



CRM



Recent Key Developments

Constantly evolving....:

- Labour Productivity
 - Job throughput
 - KPI's – Business Performance
 - Purchasing performance
 - Stock analysis
 - Quoting analysis
 - CRM Marketing & Budgets
 - Finance
- + Custom Dashboards



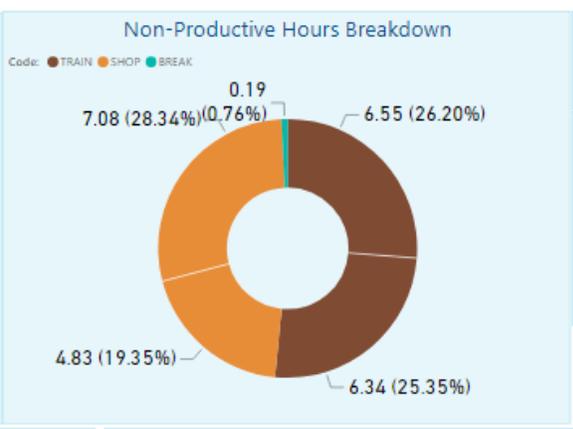
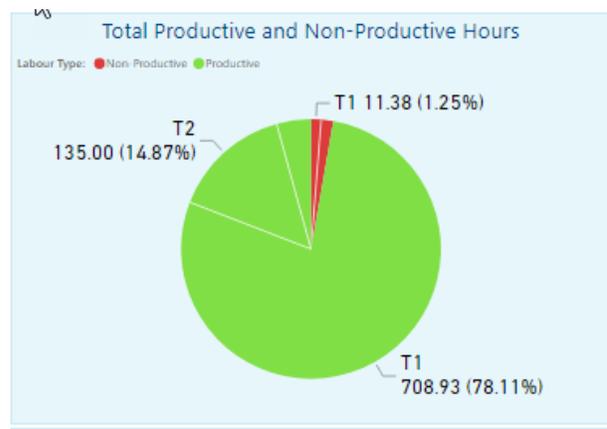
Dashboards



Dashboards



Quotes Created	2	Quotes Value	£2.11K
Jobs Accepted	20	Accepted Value	£10.63K
Jobs Completed	10	Completed Value	£1.45K
# of Deliveries	2	Delivery Value	£549.60
# of Invoices	5	Invoice Value	£2.98K
# of Job Credits	(Blank)	Job Credit Value	(Blank)
Revenue			
£2.98K			



Recent Key Developments

- Supplier invoices Reporting
- Labour Timesheet Reporting
- Active Jobs Reporting
- Sales Ledger Reporting
- List quotes by decision date.



Enquiry Scheduler

Recent Key Developments



- Engineering statuses allow “% Complete” updates during WIP processes.
- Link Labour Operations to “Engineering Statuses”

Job Tracker



Job Tracker

EMiR Job Tracker

Logged in as: Mr Brian Jones

EMiR Software

Unit 1, The Chambers, Bowden Business Village, Leicester Road, Market Harborough, LE16 7SA

EMiR welcomes Mr Brian Jones to our tracker page.

Details of your job booked in on 22/02/2024 and also the current progress status of the job are shown below:

Job Details:

Progress:	<div style="width: 80%; background-color: green; border: 1px solid black; text-align: center;">80%</div>
Job Number:	50575
Customer:	United Performance Ltd
Item:	ALPHA 2 PUMP FOR OVERHAUL
Customer Ref.:	53443
Current Status:	In Testing
Estimated Despatch Date:	18/04/2024

Contacts:

Project Director:	Andrew Morren
Project Manager:	Ann-Marie Walker
Account Manager:	Mr Gary Downes

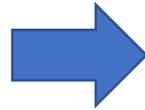


As seen on arrival



Job Tracker: Engineering Statuses

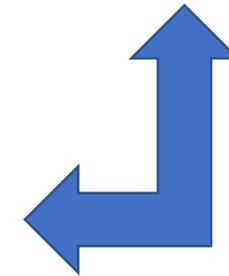
EMiR Status	% Complete
To Be Quoted	10%
Evaluation [Quoted]	30%
Work In Progress	40%
Finished Goods	90%
Delivered/Invoiced	100%



Engineering Status	% Complete
Awaiting Inspection	10%
Dismantled	20%
Inspection	25%
Replace components	50%
Assembly	60%
In Testing	70%

Work Done Code	Engineering Status
ASM - Assembly	Assembly
TST - Testing	In Testing

Update Engineering Statuses via recording labour operations



Work in Progress to Finished Goods is 50%

Engineering Statuses can fill in gaps and give more detailed updates

Visual Job Management

Dismantled, to be mech...	Awaiting inspection	Ready for Quoting	Waiting Quote Acceptan...	Work approved and und...	Work complete awaiting...
<p>50486 United Performance Ltd Recd: 23/12/2013 Due: 16/05/2022 Est. Desp Date: T.B.A. ABB</p> 	<p>60054 United Performance Ltd Recd: 10/02/2020 Due: 30/06/2022 Est. Desp Date: 11/02/2020 DODGE</p>	<p>50754 United Performance Ltd Recd: 05/05/2016 Due: 20/09/1905 Est. Desp Date: T.B.A.</p>	<p>51055 Able Enterprises Limited Recd: 23/11/2016 Due: 05/07/2022 Est. Desp Date: T.B.A. AEROTECH</p>	<p>60998 United Performance Ltd Recd: 10/05/2022 Due: 12/05/2022 Est. Desp Date: 04/01/2021 ABB</p>	<p>51205 United Performance Ltd Recd: 02/01/2018 Due: 27/07/2022 Est. Desp Date: 09/03/2020 ABB</p> 
	<p>51346 A.D. Food Resources Limited Recd: 29/10/2018 Due: 10/08/2022 Est. Desp Date: 23/03/2020</p> 	<p>50837 United Performance Ltd Recd: 05/05/2016 Due: 20/09/1905 Est. Desp Date: T.B.A. ABB</p>	<p>60274 Aire Agricultural Limited Recd: 07/07/2020 Due: 24/05/1901 Est. Desp Date: T.B.A. TT</p>	<p>61267 Fluid Lifeline Limited Recd: 28/02/2023 Due: 18/12/2023 Est. Desp Date: T.B.A.</p> 	<p>60999 United Performance Ltd Recd: 10/05/2022 Due: 28/11/2022 Est. Desp Date: 04/01/2021 ABB</p> 

Recent Key Developments

- Improvements to Calendar Overview
- Improvements to Job Calendar
- Resource swapping improvements
- User defined colours for non-prod time



Labour Scheduling



Recent Key Developments

- Version 6 was released recently:
 - Multiple Assets per job
 - Cloud documents
 - Safety checklist questions can be mandatory
 - Request a job
 - Photos to hold Comments and Recommendations text



Smart Site



Upcoming Key Developments

- New functionality on the way:
 - Labour Scheduling calendar view within the App
 - Job list to list the same job more than once, if it is booked on upcoming days
 - Allow labour recording by time bands instead of using time periods.
 - Labour view to show all labour recorded by the engineer in a time range, not just on the active jobs.
- Non-productive Labour Recording.



Smart Site



Recent Key Developments

- Callout rates [16 hours]
- Additional unpaid breaks [12 hours]
- Multiple job selection [30 hours]
- Overtime availability [20 hours]



Time & Attendance

Recent Key Developments

- Despatch Email and Completed Jobs Notifications
- High Value Order Email Notification
- 1, 2 & 3-Month Outstanding Invoice Chasers
- Overdue Purchase Order Email to Supplier
- Purchase Order approval from Email (Accept/Decline)
- Chase Customers for Overdue Quotes
- List Stock Items which are Below Minimum Stock
- List Items Due for Calibration
- List Customers on Stop



Task Centre



With Thanks
to our
Customer
Base

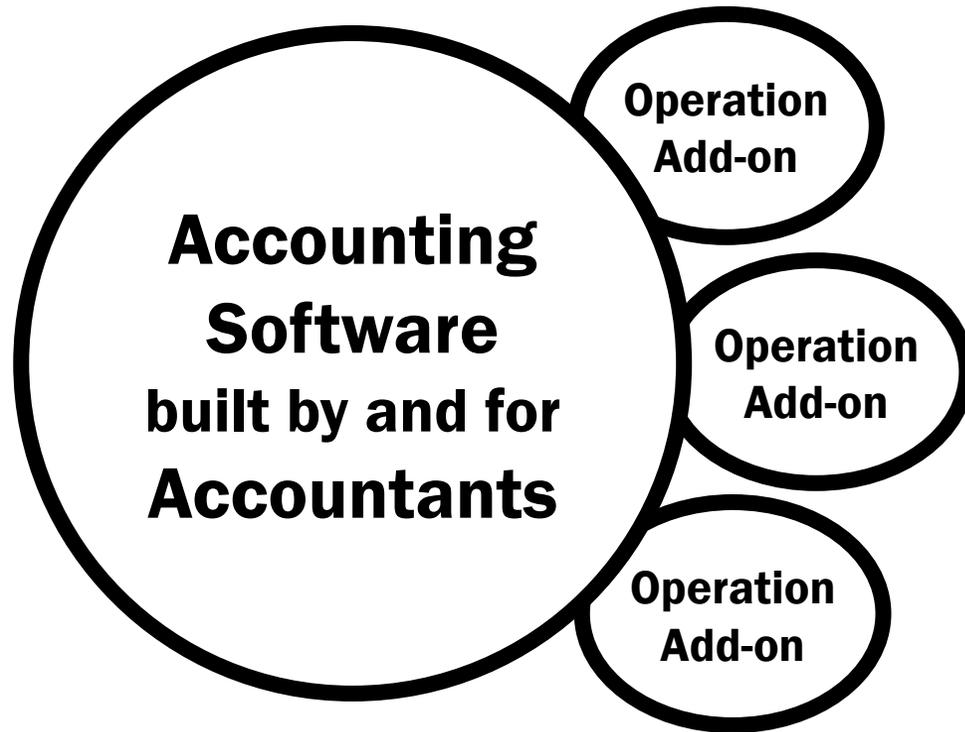


Focus on Finance

Annette Boulter Software & Training Consultant



Focus on Finance – Why?



Focus on Finance – Who?



MKE
Engineering
Group

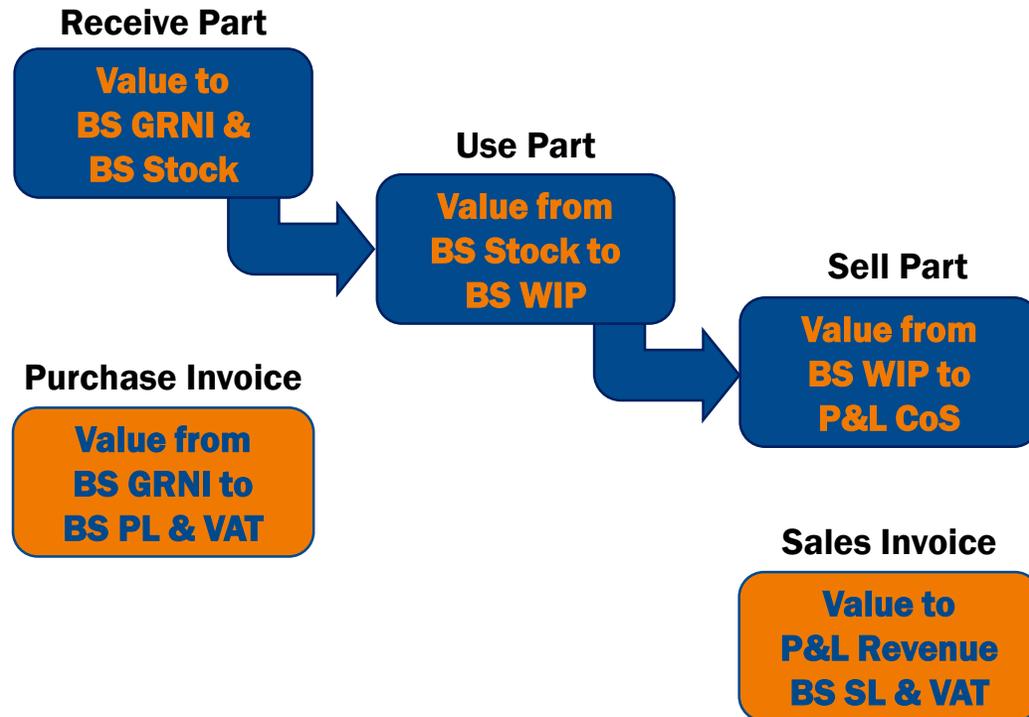


Focus on Finance – 8 Key Themes



Focus on Finance – Live Finance

Financial Transactions happen when physical activity is recorded in EMiR:



- Both Stock Asset and 'Goods Received not Invoiced' liability automatically update (when parts are received and GRNI when supplier invoices posted)
- Stock (and WIP) valuations change when parts are 'Used' within EMiR
- WIP Costs are released to the P&L when job is invoiced to the Customer.

Focus on Finance – Flexible Reporting



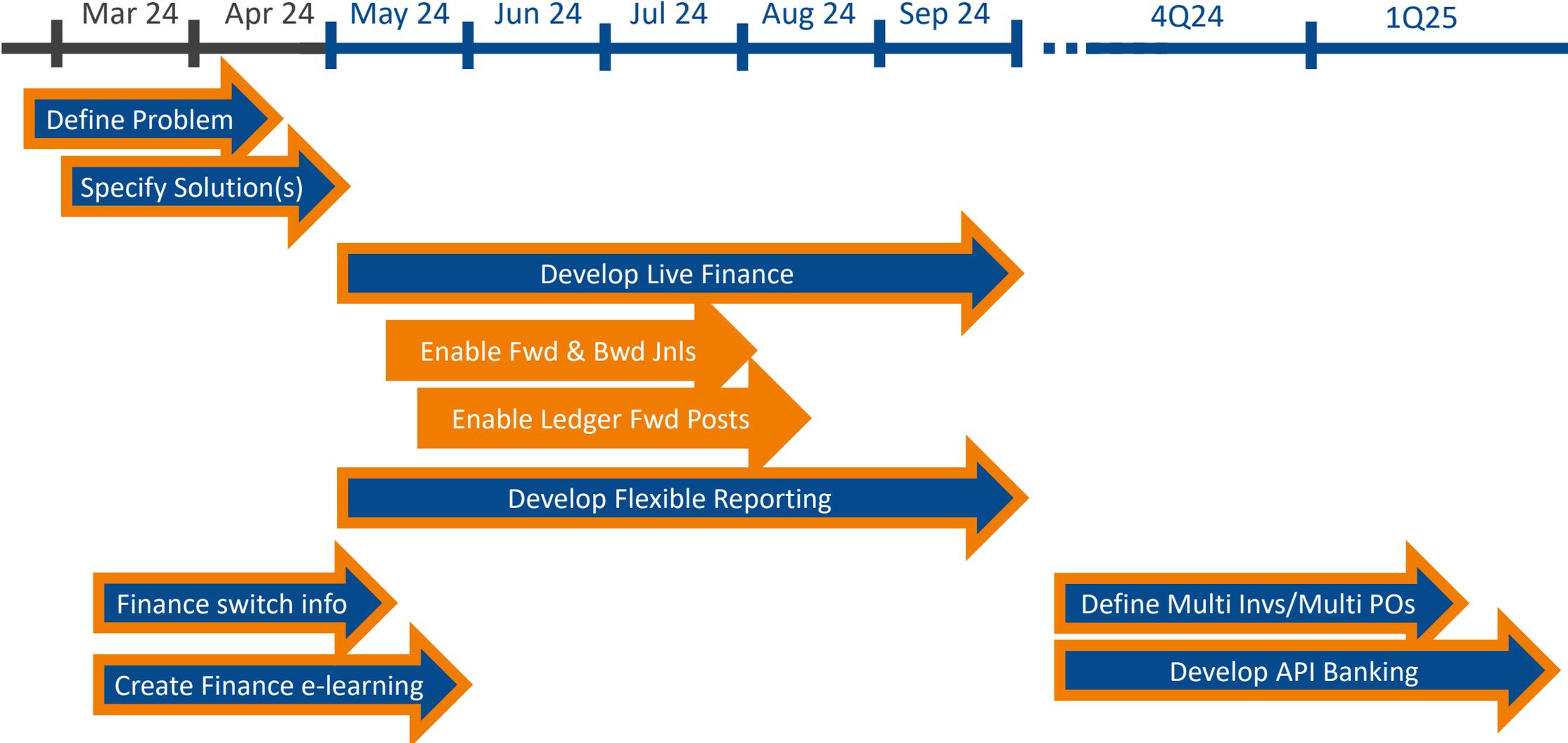
EMiR Finance Reporting via SaaS

- Always-on, Internet accessible
- Move to four-digit Nominal Ledger codes as standard – to give much more flexibility in coding
- Allow users to define which codes are reported in which area of the financial reports (in any order)
- Allow users to define their own Chart(s) of Account, reporting areas and subtotals used
- Ability to report month & YTD, month by month, defined period and against budgets.

	Actual April 2024	Actual May 2024	Actual June 2024	Actual July 2024	Actual August 2024	Actual September 2024	TOTAL
4 Sales	0	0	0	0	0	0	0
12 Cost Of Sales	0	0	0	0	0	0	0
20 Gross Margin	0	0	0	0	0	0	0
24 Overheads							
201 Admin - Wages	0	0	0	0	0	0	-20
205 TELEPHO							-10
502 RENT & R							1,000
654 BANK CH							-10
26 EBITDA							-960
27 Depreciation							
660 Depreciat							500
30 EBIT							-1,460
32 Interest Received							0

BALANCE SHEET - April 2024				
53 Fixed Assets				
754 PLANT & EQUIP DEPRECIATION		-500		
			-500	
55 Total Fixed Assets			-500	
59 Current Assets				
861 SALES LEDGER/TRADE DEBTORS		7,200		
891 HSBC CURRENT ACCOUNT		50		
			7,250	
65 Current Liabilities				
901 PURCHASE LEDGER/TRADE CREDITORS		1,800		
902 ACCRUALS - DEFERRED REVENUE		300		
903 CORPORATION TAX		456		
921 VAT		900		
			3,456	
70 Net Current Assets			3,794	
80 Net Assets			3,294	
86 Capital & Reserves			0	
87 Profit - This Period			-2,106	
90 Shareholder Funds			-2,106	

Focus on Finance – Proposed Timing



Focus on Finance – Why?

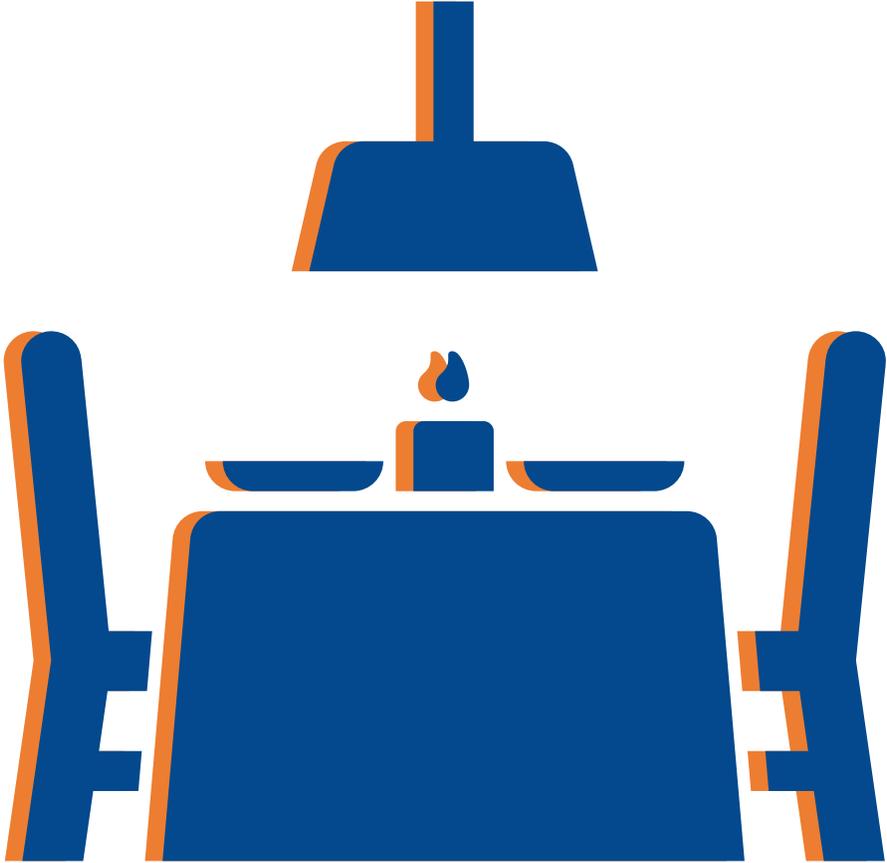


Because Accountants are special too!

Focus on Finance



Lunchtime!



Welcome Back!



The EMiR Journey Continues



Geoff Perkins
Managing Director



The EMiR Journey Continues



- CSL credibility and experience
- The EMiR development journey
- The benefits of SaaS
- The story so far
- EMiR SaaS demonstration
- Q&A



Commercial Software

- CSL formed in 1983, 41 years old this year.
- 5 major SaaS platforms in the market today.
 - Developed on the CSL Framework.

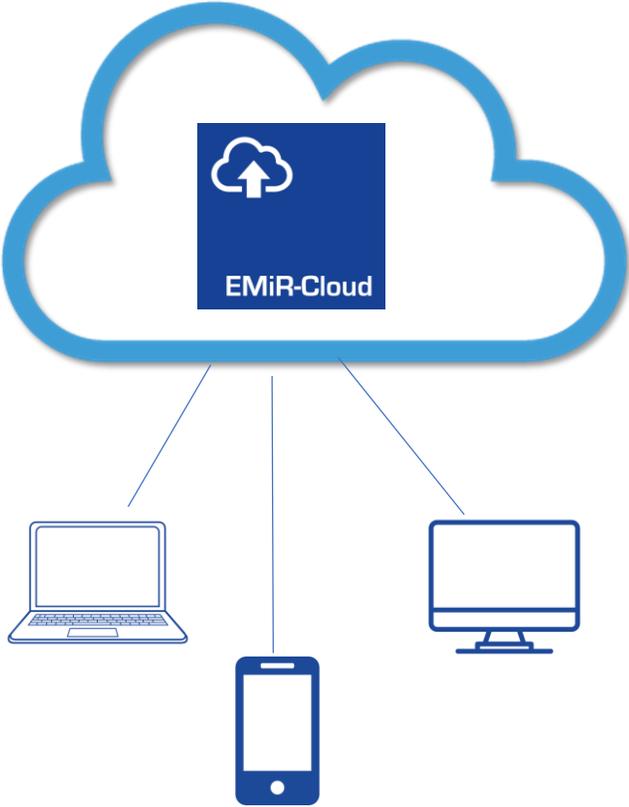


EMiR Development Journey

Desktop Software



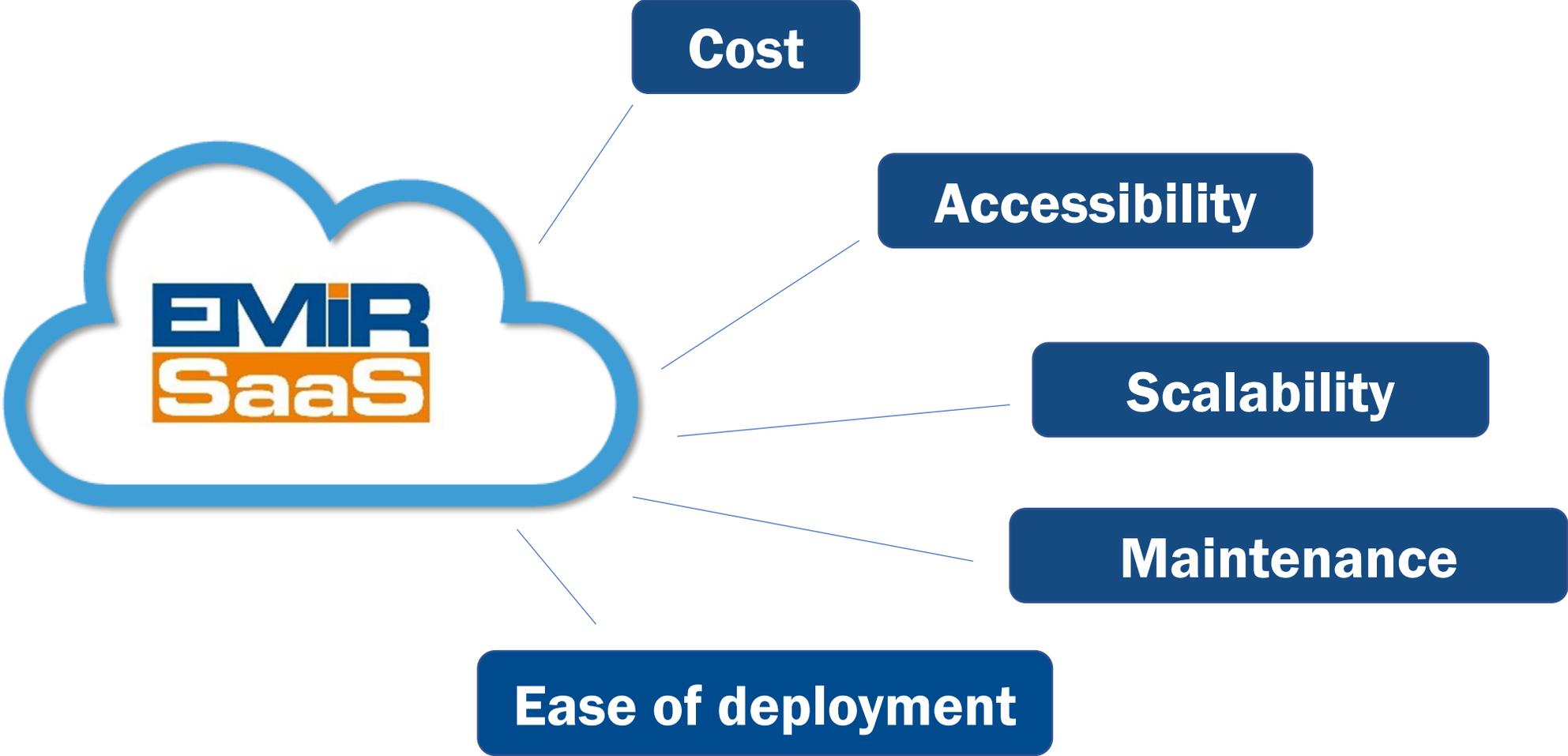
Desktop as a Service



Software as a Service



Benefits of SaaS



Proof of concept

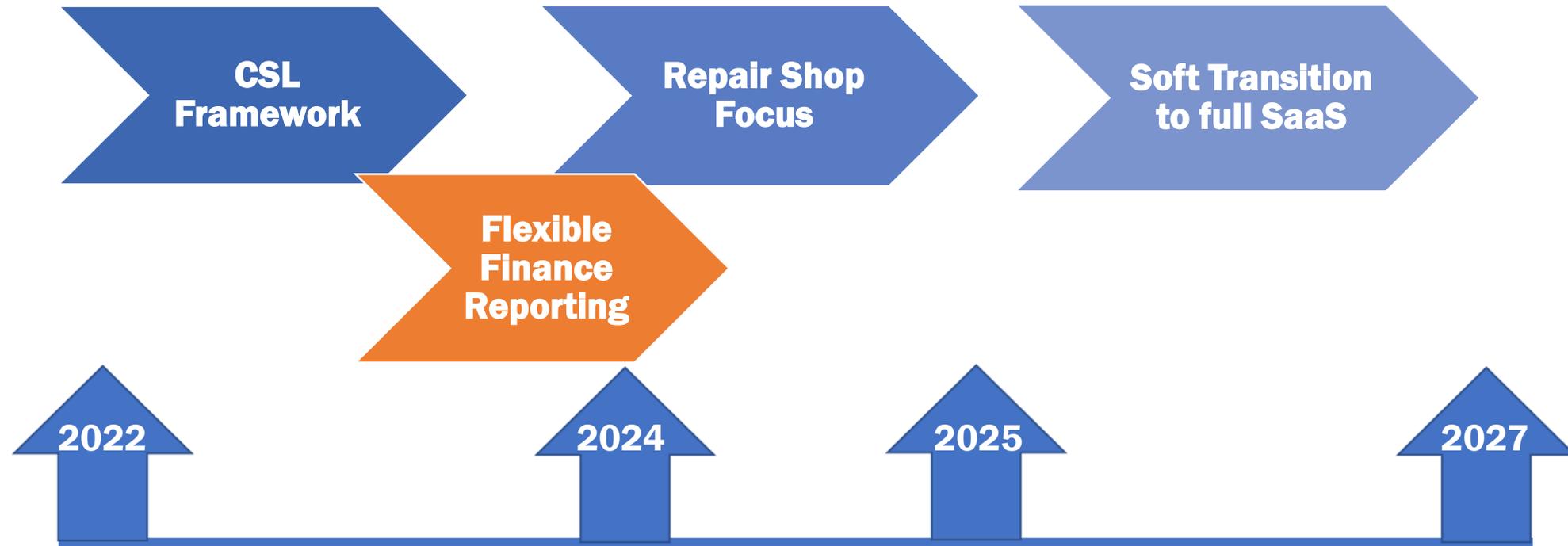
**Applying the
CSL framework
to EMiR**

**Creation of a
Sales Order
Process**

**Testing the
workflow and
developing
further**

EMiR SaaS Sales Order Process Demonstration





Thank You!

