

EMiR

Electro-Mechanical Information Resource
Modules & Extensions

E-Commerce

Web-CALS

Stock

Purchasing

Quoting

Finance

Asset
Management

Winding
Details
Database

Basic

Time &
Attendance

Web Job
Tracker

EMiR^{PDA}

Labour
Scheduling

CRM







UPDATED
2012
EDITION

Contents

Welcome to this brochure on our market-leading EMIR Software. The core EMIR software consists of the 'Modules' listed below, and these have been expanded into new areas by use of separate programs or 'Extensions' that use exactly the same EMIR data, but in new and wonderful ways!









EMIR Modules

EMIR modules are the core components of our EMIR Standard and Professional systems and plug together to deliver key business management capabilities.

	Basic	The initial 'building block' for EMIR containing all the key functionality for job management including receipt of jobs, job costing and delivery and invoicing. Comes with both Sales and Purchase Ledgers and lots of enquiries and reporting to help manage your business.	2
	Stock	This module allows you to add stock control to your system ensuring you know the value and level of stock items and much, much more.	4
	Purchasing	This module allows you to raise orders, receive and reject goods and allows you to manage all your purchasing activity.	6
	Quoting	The Quoting module will allow you to see what needs to be quoted and then raise and track your quotes.	8
	Finance	Full financial control is provided, so you can produce Profit and Loss statements, Balance Sheet, Trial Balance and VAT Returns, Bank Reconciliation, Credit Checking and much more.	10
	Asset Management	This allows you to manage your Customers' motors, drives, gearboxes or pumps and track all related activity.	12

EMIR Extensions

EMIR Extensions are designed to extend the core operation of EMIR into new and exciting areas via new channels such as the Internet or PDA devices, or simply by extending the use of EMIR to other parts of your organisation.

	Labour Scheduling	Extend EMIR into managing your staff and allocating them to jobs along with the resources they need.	14
	Time and Attendance	Track your staff activity live in the workshop via use of barcode scanning for the true job costing picture.	16
	EMIR^{PDA}	Allow your site engineers to update EMIR live from wherever they are by use of a PDA with web access.	18
	Web Job Tracker	Keep your customers informed as to the progress of their jobs via use of this email and web-based system.	20
	Winding Details Database	Store and retrieve motor winding details via use of this extension based on the AEMT winding data book.	22
	Web-CALS	This extension allows your customers to get restricted access to your Asset Management information.	24
	E-Commerce	Everything you need to start selling your stock on the web, and retrieve web orders into EMIR for processing.	26
	Customer Relationship Management [CRM]	Complete analysis on customer related activity such as contact management, campaign management, quoting activity, salesman performance, order processing, and more.	28



Basic System

The EMIR Basic System allows the user to create jobs, record costs along with details of work carried out, allows the user to process the job through to producing delivery notes and invoices, and keeps track of debtors and creditors.



Each job is booked in against the appropriate customer, who has a unique account code for identification purposes. Each job is given its own 'Job Number' for traceability purposes, helping users to conform to ISO9000. The system holds comprehensive details against each job, and extra fields can be added to suit individual requirements. Standard details held include: -

- **Make and Type/Description of machine**
- **Client Details, Contact person and Order Info**
- **Date Due, Job Priority and Department**
- **Faceplate details of Pumps, Motors, etc.**
- **Price and 'Recommended Charge' fields**
- **Photo's, Files, Notes and additional comments**
- **Details of Materials, Labour and Work Done**
- **Invoice and Delivery details**

EMIR produces a job card for each job raised. Job cards can be customised to suit a required layout and, like Delivery Notes and Invoices, are designed to fit A4 blank or Company headed paper as standard.

EMIR allows the user to record all labour and material costs and charges, and also allows the user to enter the details of work that has been carried out against the job [and then this automatically appears on the invoice].

Comprehensive enquiry and reporting facilities are available to show a complete 'Job Costing' picture to ensure that you are charging the correct profitable amount for the work carried out.

Labour costs can be recorded directly against a job or by a time sheet method. Both methods will automatically update the labour costs and charges [based on a margin] against the job, but the advantage of the time-sheet method is that it also allows the recording of non-productive time, such as Sickness or Holidays.

Details of materials used are also recorded against the job. Entering costs & quantities used, based on a default margin or on a discount from RRP per client, means that EMIR can automatically calculate a "recommended charge" for you.

The service that has performed on a job is then recorded via use of Work Done Codes (WDC). These are common phrases describing common work that is carried out (e.g. A - Strip Down and Test). Each item of 'Work Done' that is added to the job is then printed on the invoice for the customers' information.

“EMIR has made our job management, costing process, delivery and invoicing much quicker, simpler and far more traceable.”

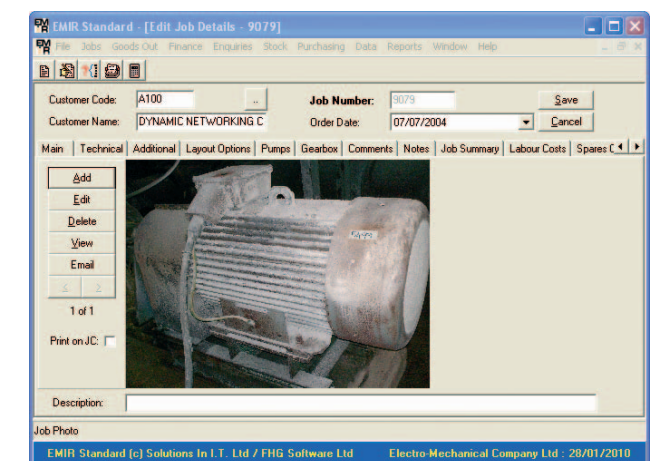
David Breen
General Manager, Bandon Rewinds, Eire

The Basic System has many useful features to help deliver real benefits to your business:

- Each customer order is produced as a 'job' with a unique identifier for traceability. Job details are comprehensive and ensure that all information related to that job can be kept together and easily found.
- You can store photo's against the job which are ideal for showing evidence of damage or to ensure that the condition which the unit arrived in is recorded. You can also link Microsoft Word™, Excel™ or any other kind of file directly to the job. Many users also scan in completed [handwritten] job cards so they have an easy way of finding the original handwritten information if they need to!
- The basic system will allow you to progress a job from 'Work in Progress' through to "Invoiced" producing all the necessary paperwork along the way. Such invoices and delivery notes can be customised with your logo and can optionally be emailed directly out of EMIR via use of your email package. This saves time, printing and postage and provides a full colour copy!
- EMIR will ensure you know what the job has cost you, and what you should charge via EMIR's job costing information. Never knowingly undersell your time again!
- EMIR will keep track of all your labour via use of its labour recording system that allows you to capture both productive and non-productive time. This way you know exactly what your engineers have been up to and how much of their time has been chargeable!
- EMIR helps to capture all material costs against the job, and you can also add EMIR's **Stock and Purchasing Modules** if you want to properly track stock movements and the raising and receipt of purchase order goods.



- Even if you are not good at typing you can produce delivery notes and invoices quickly and simply. Invoice text is taken from Work Done Codes that you can setup and turn into Groups so that in one 'click' you can add 13 lines of description to an invoice!
- There are many enquiries that allow you to find a job via job number, serial, customer, delivery note, invoice, customer ref, manufacturer and even the technical characteristics of motors, pumps and gearboxes! In short, you will never have to search through paper lists again!
- Extensive enquiries and reporting allow you to find out all you need to know about your job costing profitability, customer profitability, revenue produced, your active order-book, and much more! This reporting will ensure you can stay on top of your business and control it better, and EMIR's enquiries can be exported to Excel™ with one click of your mouse.



Stock

The Stock Module is used for the complete control of all stock items. Each stock part has its own stock 'profile'. The profile details the number of items in stock, the amount recommended for purchase, those actually on order, any shortages of the part required for jobs, and the number of that part that are already allocated to jobs.

The EMIR Stock Module has many useful features to help deliver real benefits to your business:

The stock system interfaces into the Job Costing section of the Basic system to provide known part and pricing information, such that when a stock part is recorded as used against a job, the stock levels are decremented accordingly. This ensures that your stock system always shows the true picture of your stock levels and value.

Information stored against stock parts includes a 20 character part number, 50 character description, a cost price, an RRP, a lead-time for supply, and you can also track by serial number, record stock as 'consignment stock' and store 'price break' information (if you do get cheaper prices based on the quantity ordered).

EMIR can be used to analyse usage of all stock parts and set minimum and maximum stock levels with required re-order quantities. These can be over-ridden by the user's own manual entry. EMIR can also produce purchase recommendations, based on these minimum and maximum levels, to ensure that stock holdings are kept at desired levels. If used in conjunction with the Purchasing Module, the user can accept any of the recommendations required and EMIR will automatically produce purchase orders to the required suppliers.

Each stock item can be purchased from multiple suppliers, by use of Supplier Parts. So for each part you can have many suppliers with each supplier calling the item by a different catalogue number [if required].

The EMIR stock system will also allow you to set discount rates by customer so items are sold at their agreed prices, and provides all the reports and enquiries you need to help manage your stock efficiently including stock valuation reporting, stock check reporting and details on top moving items. Make sure you know the price of the key spares and products that you sell and ensure you can track how often they are used and where they are stocked.

In short, EMIR has everything you need to manage your stock efficiently and keep it accurate and up-to-date!

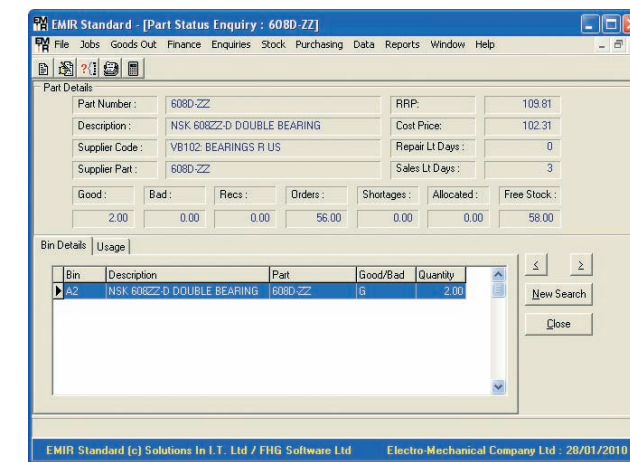
“Within months of starting with EMIR, the benefits became obvious and the longer you use it the more those benefits become apparent, from prompt handling of enquiries to stock control - I couldn't imagine now working without it.”

Barry Palmer
Sales Manager, Kirkby-Lindsey, Hull.

- EMIR will set min and max levels for stock items based on their usage, and alternatively allow you to set your own min and max levels and then use these levels to recommend purchases to ensure you don't run out of key stock items.
- EMIR will recommend items that are below minimum stock for order and allow you to raise Purchase Orders in seconds to ensure your stock is kept at the optimum level for your business. [Requires the Purchasing module also].
- EMIR will allow you to track your key items by Serial number ensuring you can always trace if a particular item is on the shelf or to find out which job it went out on and which customer it was sold to.
- There is the option to assign a stock part to a 'stock group' e.g. Copper Wire. This then allows all those parts in a stock group to have their price changed by a standard amount. E.g. To increase all the prices in the stock group by 10%.
- There is also the option to set discounts for each customer based on Stock Group, so that you can default the charges for materials sold to customers. E.g. You can assign a particular customer with 10% off the RRP for Bearings, and 5% off for Brook Motors, etc. Material costs are then charged to customers on an RRP less Discount basis meaning that you don't have to spend time working out a price for a customer!
- You can manage and change stock levels by use of Stock Gain and Loss functionality, and also 'date stamp' a part's level as correct to help with subsequent stock traceability. This means that you have all the necessary tools to ensure your stock reflects accurate levels at all times.



- You can also set bulk discount price information, so EMIR will know what price is relevant dependent on the quantity you buy!
- If you purchase our E-Commerce solution, you can also store photo's and other details against stock items and choose to sell them directly on line.



- There are also lots of Reports so you know exactly what is happening with your stock!
 - All stock transactions for a part or all parts over any date range.
 - Stock check report to show parts and their stock levels by bin location.
 - Report of top moving stock items.
 - Report of purchase recommendations, indicating which stock items now need purchasing because they have gone below their minimum stock level.
- Our Professional version also lets you use "Master Suppliers", so you can buy the same parts list from more than one supplier, and there are many other useful options available!



Purchasing

The EMIR Purchasing module is the ideal way to track and perform all your purchasing activity, whether buying for stock or directly for an ongoing Job. Ensure you know the status of your purchased items and track what is open, overdue, delivered or has been returned to the Supplier via its goods rejection system.

Purchase Orders can be raised for stock items in conjunction with the Stock Module (which allows entry of known part numbers with known prices), miscellaneous items (free hand text entries), and can be purchased on 'General' orders or on "Direct" orders against Jobs and you can also combine the two in our Professional version.

The Purchase Order is created listing the items to be purchased, detailing part numbers and descriptions, quantity and pricing information. There is also the facility to set a delivery date for each item, so that the supplier's performance can be monitored against required delivery dates. Purchase Orders can be raised in the appropriate currency of the Supplier. The printed Purchase Order is designed to fit A4 blank or headed paper as standard.

When ordering stock items, all the details of the parts required are automatically entered on the purchase order. When the order is received, the stock level is automatically increased.

When ordering items directly for a job (whether stock or miscellaneous items), all the items ordered will immediately be recorded to the job (bypassing the stock system), so no additional work is required for recording spares usage, ensuring that the job costing process has all the required data it needs. EMIR also has facility for recording extensive notes against each item ordered [text blocks], and allows carriage to be recorded separately [without the need to record it as an item on the order].

The Purchasing module has its own 'Goods In' functionality to receive the items ordered, and each delivery of goods received is uniquely logged with its own electronic Goods Received Note [GRN]. Goods can also be rejected through EMIR, and EMIR will produce a Rejection Note that is ideal to accompany the goods back to the supplier.

Purchase order numbers can also be 'reserved' for use at a later time. The order can subsequently be amended to enter the actual items required, which is ideal for site engineers placing orders on the move.

EMIR allows you to set various limits on PO creation so that PO's above that value will require approval before they can be printed or emailed. Such approval is flagged internally by EMIR to the appropriate users and subsequently the PO raiser is informed when the PO has been improved – all via EMIR's internal email system!

“We have seen EMIR as an important part of the growth we have seen as a company and it continues to provide all the information and time-saving features that we need to help grow the business further without the need for more administration staff.”

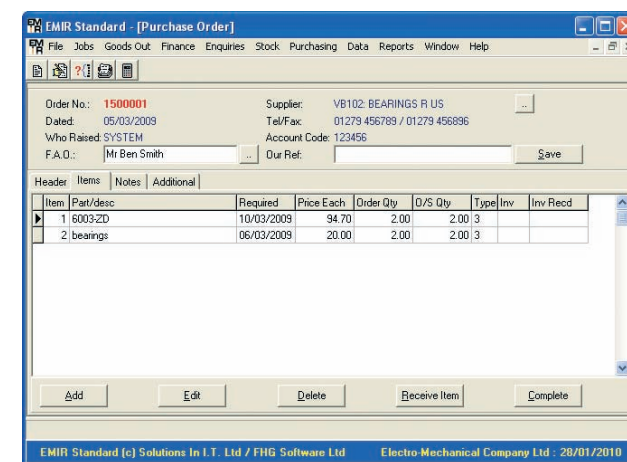
Chris Carrick
General Manager, ADC Electrical, Washington.

The Purchasing module has many useful features to help deliver real benefits to your business:

- Viewing details of all parts purchased from a specific supplier, or all suppliers so you can trace where you buy things from and for how much.
- Viewing outstanding/overdue purchase orders with the option to export to Excel to email directly to the supplier to chase up your orders in a flash.
- List Goods Received within a date range, along with values by supplier.
- List Goods Rejected within a date range along with traceability of whose fault the rejection was.
- Reports on the value of committed spend on Purchase Orders raised by Account Code or by Supplier. The Account Codes can be set by the user, e.g. Engineering, Administration, etc. to help control budgetary spend.
- EMIR also allows you to set up an order 'approval' processes, so that only once a specified 'approver' has authorised the order, the PO can be printed or Emailed from EMIR. You can also set user limits specifying what value they can order without approval being necessary, and set minimum order values by supplier.
- Order known 'stock' items or 'miscellaneous' items for full flexibility when ordering.
- You can add unlimited notes that will print after the item on the PO, ensuring that the description of what is being purchased can be as detailed as you need it to be.



- Direct delivery to a customer's site is easily arranged by simply ticking a box to change the delivery address from your own premises to the site for the job [job related orders only].
- You can set unique delivery due dates against each item, to ensure that EMIR can inform you of all items that are overdue or haven't been received yet, allowing you to stay on top of your orders.
- Returning faulty or unwanted goods is simple with the Rejection process that will automatically produce all the paperwork you need to return the goods, reduce stock accordingly, and keep track of any vendor performance issues.
- Part number 'fuzzy match' is used to find more details about a part, such as suppliers of the item, full part number and description. By entering a keyword connected to the part, all items containing the keyword are listed for viewing.





Quoting

The Quoting module allows users to create quotes for Repair, Sales, and Service work. EMIR provides all the tracking and traceability you need to know.

The Quoting Module has many useful features to help deliver real benefits to your business:



The Quoting Process

Quotes can be raised from EMIR either from a job [in the case of repair/service] or by just creating a quote [for a sales order]. EMIR can then tell you:

- Which jobs need to be quoted?
- Which quotes are outstanding and need to be followed up?
- Which quotes have been successful?
- Which quotes have been rejected?

Status

For those created from a job, EMIR will change the status of the job from “Work In Progress” to “Evaluation”, so that the user can tell from the status that the job has an open quote against it that the customer is evaluating.

Types of Quote

There are two choices when it comes to creating quotes:

- 1) You can choose to use the EMIR quote layout which allows you to combine the customer information with a description of the work to be carried out and photographs of the item concerned. EMIR allows you two different layouts, including a BASEEFA style layout which shows more technical information about the item being repaired. You can optionally create a new quote from an old one, and you can also add a Quote Acceptance page to your quote for the customer to simply sign and send back to proceed with the quoted work.

You can also store notes against the quote so any users can see how the quote has progressed. EMIR also allows

you to plan the materials and labour element of the quote which can optionally be printed in detail on the quote - should the customer require it. EMIR will also allow you to order the necessary materials from the accepted quote via linking to our purchasing module.

- 2) You can also optionally add the ‘File-based’ quoting system in which EMIR allows you to use Microsoft Word™ or Excel™ to create the quote to your own layout, but key information about the quote is stored within EMIR and the document is also stored within the EMIR system so everyone can find it and view it [you don’t need to worry about where it is saved!].

Certificate of Conformance

EMIR also allows you to produce a certificate of conformance, similar to the BASEEFA style layout, so that you can provide a suitable certificate of conformity for any quoted item.

“We have grown the business very quickly and EMIR has enabled us to keep track of all our jobs, purchases, stock, quotes, and it has also given us complete financial management. It’s an excellent system, and I have no hesitation in recommending it to others.”

Malcolm Martin
Managing Director, StarDelta Ltd, Grimsby.

- EMIR ensures you can keep track of all quoting work and as all the information is stored within EMIR records, you don’t have to go hunting for paper information ever again!
- All quotes, that are produced using EMIR standard layouts, will look the ‘same’ so providing a consistent and professional image for your business.
- EMIR allows customisation of the layouts with your logos so that your branding is shown, and you can also directly email the Quotes from within EMIR via use of your email package such as Microsoft Outlook™ or Outlook Express™. Quotes are produced in full colour PDF’s which are ideal for emailing, and save the need for printing and/or faxing.
- EMIR allows you to plan the materials and labour for any quote and these can optionally be printed if the customer requires a breakdown of the costs involved. These costs are stored against the quote and can be compared against the job to see how you have fared compared to the planned price. This is ideal for seeing how good your predicted costs are against the actual and so learning where costs have been underestimated.
- EMIR allows you to include photo’s on the quote, that print two across the page, to show damage or other visual information that you wish to help demonstrate the work/cost involved. A picture says a thousand words after all!

- EMIR makes it easy for your customers to place an order by adding a Quote Acceptance page to your quote that your customer can simply sign to proceed with the work quoted. Make it easy for the customer, and you have a better chance of getting their business!
- Do you need to show “Ex” type repair information in your quote and produce a Certificate of Conformity when the work is done? No problem, EMIR’s BASEEFA style quotes do all this for you and make it quick and easy for you!
- Our File-based quoting option allows you to make use of Microsoft Word™ or Excel™ to produce your quotes should you need to provide lots of information and options within your quote. The quote is still stored within EMIR so all staff can still find the quotes quickly and easily!
- Take control of your quoting process by ensuring you know what quotes need to be produced and which quotes need to be chased. Keep track of how a quote is progressing by reviewing notes, and don’t miss out on business ever again!



Finance

The Finance Module adds the full Nominal Ledger accounts to the Sales and Purchase Ledger functionality that is available within the Basic system to ensure your financial information complies with all audit requirements.

The EMIR Finance module has many useful features to help deliver real benefits to your business:

Sales Ledger

The Sales Ledger is available within the Basic system and provides the essential functionality you need to control your debtors. This module includes Invoice and Credit Note production, receipt of Payments and Deposits, Aged Debtor Analysis, Statements and comprehensive reporting facilities.

Purchase Ledger

Includes functionality to record the Receipt, Approval and Payment of Invoices; Holding invoices for nonpayment and printing of Suggested Payments and O/S Creditors reports.

Nominal Ledger (NL) & VAT

The NL provides a Full Trial Balance, instant Profit and Loss, Balance Sheet and Fixed Asset Control. The reports available include the VAT Return option which shows you all the totals and evidence you need to complete a VAT return.

Cash Book and Bank Reconciliation

Automatically builds entries into a 'Cash Book' from transactions that are made during the normal running of accounts, such as Purchase Ledger payments, Sales Ledger payments and Journal entries. A Bank Reconciliation option allows you to 'tick off' entries that appear on your statements to ensure that you haven't missed any transactions.

Open Postings

The Nominal Ledger allows the user to continue processing transactions in advance of the current financial month up to the current date. E.g. If you are in financial month of September, but it is the calendar month of October you can still do October transactions without affecting the month of September.

Financial Reporting

All reports can be viewed or printed at any time of the month providing a complete audit trail:

- Trial Balance, full and summary
- Profit and Loss reporting with Schedule
- Balance Sheet
- Journal entries, showing all transactions
- Cash Book and Bank Reconciliation reports
- Sales and Purchase 'Day Books'
- Sales and Purchase Credit Notes
- Sales and Purchase Ledger reports
- VAT return reporting
- Fixed asset reporting
- Production of Debt chasing letters
- Multiple cash book setup available
- P&L analysis versus Budget
- Export of BACS payments into CSV file.
- Intrastat Reporting [Pro only]
- Cash Flow forecasting [Pro only]
- Extended options for multi-site setup [Pro only]

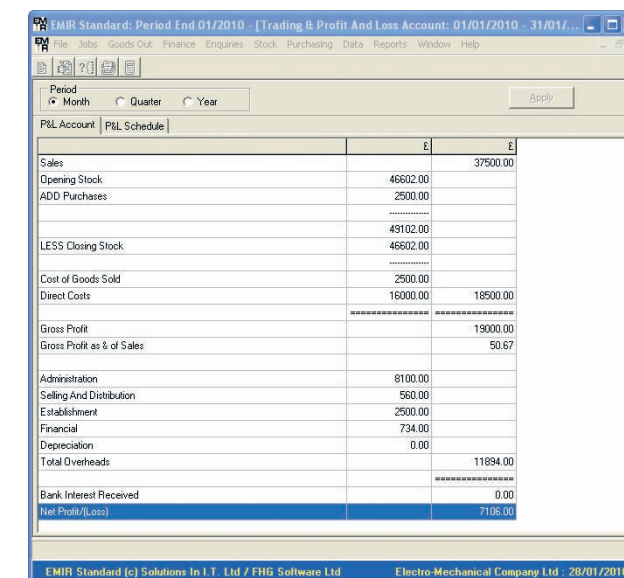
“It's so easy for everyone to use, all our records are now readily accessible within seconds. (No more searching for hours for that lost piece of paperwork). The Finance system holds so much information that our audit went extremely smoothly and the ability to tailor the system to our individual needs for a reasonable cost is brilliant.”

Christine Swan
Finance Director, Brownings Electric Co. Ltd, Barking.

- Track your sales right through from Job creation, via Invoice Production to Payment collection with detailed analysis of Debtor values at all times.
- Provides an Auto-approval analysis, by checking the details of the Purchase Invoice against the original Purchase Order placed via the Purchasing module of EMIR. EMIR will check that the goods have been received and that the value of the purchase order matches the value of the entered Purchase Invoice. If all is well, then EMIR will approve the Invoice and allow the user to select the Nominal Ledger codes applicable for the spend, otherwise it informs the user of why the invoice can't be approved but still allows the user to log the invoice for approval later.
- Completely 'live' picture of your financial situation. At any time you can see the Profit and Loss Trading Account for the current month, quarter, and year-to-date. Look instantly at the current Balance Sheet or current Bank or VAT positions.
- Completely integrated solution, there is no need to enter any piece of financial information more than once, and EMIR will cross-check any information to make sure that you are getting the most intelligence from your data entry.
- VAT returns are a 15-minute job [and that includes filling in the form!]. You can instantly see the totals received and owed and separate 'tabs' of information give details behind the VAT inputs, outputs and totals.
- Open Postings allow you to work in more than one month at once, so you can still be receiving or paying cash and logging and approving purchase invoices in the current calendar month, even if you are still financially in the previous month. This means that you can keep up with the

day-to-day transactions while still finalising your final month end accounts. You can do this in the knowledge that these 'future transactions' will not affect your current months' figures.

- EMIR also allows production of two types of Debt Chasing letters. Simply choose the type of letter [warning/final demand] and the account and it will then list the invoices due.
- Our Professional version also allows for Cashflow Forecasting using actual live invoice data. EMIR will forecast cash arriving or being paid out based on the days to pay for that customers or supplier, but each invoice can then be updated to show a revised payment date. EMIR makes use of the current bank position to forecast forward and will also store the forecast versus actual at the end of each month to see how accurate the forecast actually was.



P&L Account	P&L Schedule	£	£
Sales			37500.00
Opening Stock		46602.00	
ADD Purchases		2500.00	
		49102.00	
LESS Closing Stock		46602.00	
Cost of Goods Sold		2500.00	
Direct Costs		16000.00	18500.00
Gross Profit			19000.00
Gross Profit as % of Sales			50.67
Administration		8100.00	
Selling And Distribution		560.00	
Establishment		2500.00	
Financial		734.00	
Depreciation		0.00	
Total Overheads			11894.00
Bank Interest Received			0.00
Net Profit/(Loss)			7106.00



Asset Management

The EMIR Asset Management module allows you to store and enquire on all your clients' managed motors/pumps and other assets, and then allows you to provide comprehensive information to them on their assets and what has happened to them over a period.

The EMIR Asset Management module allows you to store and review:

- **Technical Details and References about each motor**
- **The Site, Location and Sub-location of where it is used by the customer**
- **The EX status and unlimited notes on EX related issues**
- **Unlimited Environmental information notes**
- **Unlimited General Notes about the item**
- **Additional comments that are transferred to the job when you book in**
- **Photos of the Motor to help identification - also transfers to the job**
- **Link and access any type of file [Word™, Excel™, etc.]**
- **Track and analyse fault information**
- **Track if a Managed Motor is surpassed by another or is surpassing another**
- **View all the jobs that have been created for the Managed Motor**

All this Asset Management information is available instantly whenever you book in a job for a customer and EMIR automatically transfers all the relevant data to the job to save you re-typing any of it!

Simply set up the customer as a 'Managed Motor' customer, and then add in all their motors into the database. Whenever you raise a job, EMIR will know that this is a managed motor

customer and ask if the job you are raising is for a managed motor. If it is, you simply choose a motor from their database and all the necessary information such as serial number, customer reference, technical details, additional comments, photo's etc. will be transferred across to the job.

You can then enquire on Managed Assets by Customer and Location, find the managed asset that you need and view all the related jobs for that asset.

EMIR Asset Management will ensure that you, and your client via use of our Web-CALS extension, will have complete traceability of all activity to each individual motor. You will know how many times it has been repaired and serviced, the fault history and the complete cost of all activity for the item. You will be able to lead the client as to whether the motor needs to be replaced, serviced or simply covered by a suitable spare if it is in a critical location on this site. In short, Asset Management at its best.

“From our point of view, EMIR has proved to be an excellent choice. The suitability of the functionality to our multi-site operation allows us to manage our entire business very closely...”

Martin Savage
Finance Director, Mid-Kent Electrical, Sittingbourne

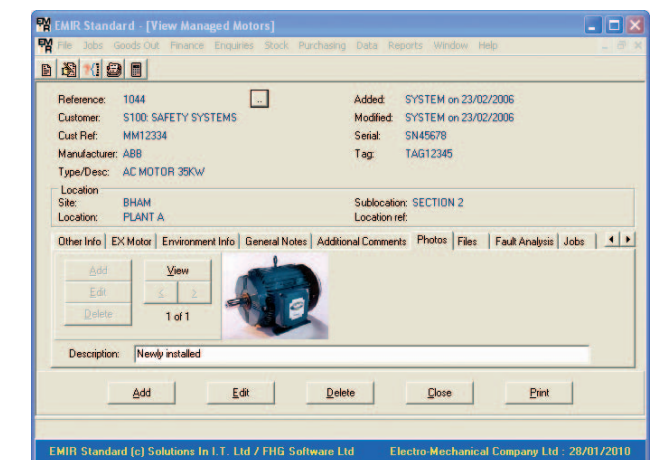
The Asset Management module has many useful features to help deliver real benefits to your business:

- Asset Management is an ideal way to 'lock in' your customers as you will be the only company to collect and maintain an accurate list of all the client's assets. This means that you will be the supplier of choice when it comes to any maintenance, servicing, or repair of their equipment.
- Store comprehensive information about each of the customer's Motors, Pumps, Gearboxes or other electro-mechanical equipment and plan all maintenance and servicing that the equipment will need by raising jobs in EMIR with their required date dues!
- Instantly raise jobs by choosing an asset from the list and you will have very little typing to do as all the information is copied forward onto the job for you!
- Keep track of all the changes of location of the asset, and whether it is an active, spare or scrapped item. You can report to the customer on how many motors/pumps of each type they have and how much spare cover there is for each – creating opportunities to sell new items to the customer to ensure there is adequate backup for their needs.
- Maintain photo logs of the items so it is easy to ensure that you have the correct item in for service and also you can see how brakes, gearboxes etc are fitted without the need to attend to site to see for yourself!
- An extension for Asset Management is the Web-CALS program, which is our Web enabled Customer Access Link System. Web-CALS enables you to allow your customers to log in directly from their own site and view their own



managed motor details. You assign each client a username and password and they are able to access the EMIR managed motor data in a limited and read-only format. You can also use this system to allow your engineers to log in from on-site to check on motor details at any time! You must have a broadband connection for this option and preferably have a Windows 2000 server or newer!

- By using Asset Management and Web-CALS together, you can ensure you provide the best customer service possible, and simply the easiest and most direct method for you and the client to share such crucial asset information and find the information you both need to run your businesses successfully.



Labour Scheduling

The Labour Scheduling extension is designed to extend EMIR's functionality into planning the staffing and necessary resources to complete the jobs at hand.

The Labour Scheduling extension has many useful features to help deliver real benefits to your business:

Calendar Overview

The heart of the labour scheduling system is the Calendar Overview which gives an immediate and updating picture of which staff are free and which are allocated to jobs or other tasks. The calendar shows employees and resources down the left and days of the week along the top. Each cell [for a person and the date] has a colour shown to represent how busy that person is on the day. For example, white cells show the user is free, while red cells show the user is fully occupied for the day.

Green and amber cells show the user is partly occupied. If the user has any activities, job wise or from manual bookings, then the details are shown in the cell and can be clicked on for more detail. The calendar overview is designed to be shown on a large screen in the workshop and engineers can click to find out details of where they are working and what resources are required for them to perform the task.

Staff Allocation and Skills Required

Staff are allocated to jobs by setting up the labour requirements against the job. The requirement can be set by skill set, or can be chosen from a created team of employees and allocated in one entry.

If a skill is required, then the system only shows those engineers who have the appropriate skill set and these are listed for the user to choose. Engineers can be allocated for multiple days in one go, and this can optionally include weekend working if necessary. The system will also show a planned cost of using the staff booked onto the job to help with quoting, etc.

Resource Allocation

In addition to staff, resources can also be entered into the system and allocated to jobs as necessary.

Site Based Functionality

Both resources and staff members are allocated to a site location and can be optionally restricted to jobs that belong to that site only. This can be relaxed if you want to choose from all staff and resources regardless of where they are based.

Manual Bookings

If resources or staff are unavailable, such as a person off sick, or a vehicle in for service, then a manual entry can be created to show the staff or resource as unavailable. You can choose a different colour for each class of manual booking so all those of the same type can easily be seen.

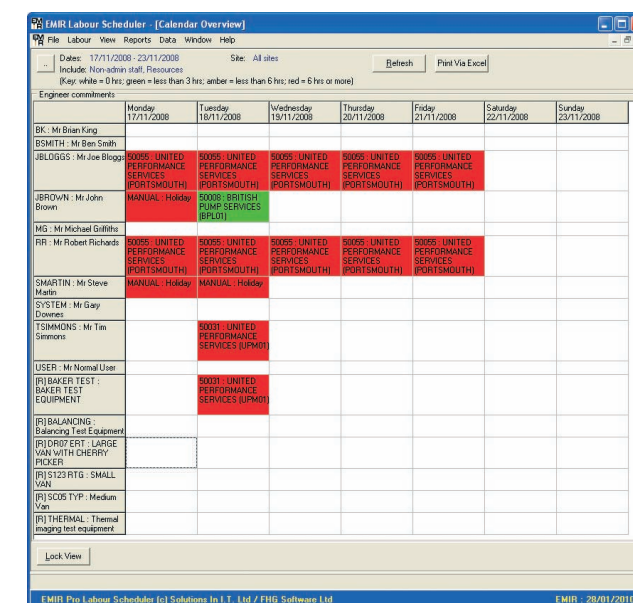
“At Knowlton & Newman, we have 100+ staff across 3 sites, the EMIR Labour Scheduling system has proved invaluable with planning and performing the work required for our customers. It gives us great visibility ensuring all staff and management have the information they need to get the job done.”

Robert Knowlton
Managing Director, Knowlton & Newman, Southampton.

- The Labour Scheduling system allows you to see, quickly and easily, who is busy and who is available amongst your staff. So you can see the whole activity picture without the need to leave your desk!
- Engineers can quickly find where they are working, including a detailed map, and which resources they require to do the job. They can even see which vehicle they require and who is going with them!
- Managers can see who is available should an urgent requirement occur, and for those using our EMIR Professional system, this can be used to check staff availability across all sites to see who has a necessary skill set to be able to perform the required task.
- When planning staff and resources onto a job, the system will calculate the cost of the staff and resources and therefore can be used to help plan pricing for Quotations, etc.
- Engineering ‘teams’ can also be created and allocated to a job in one step, which makes it very easy to allocate a team of people to a particular job.
- If a job is scheduled to take several days or weeks, then it is very simple to allocate the same engineers and resources to the job for each of those days. The Labour Scheduling system will warn you if any engineers or resources are unavailable for that period and then different/substitute engineers and resources can be allocated instead.



- The system will allow you to record manual bookings to essentially ‘book-out’ a staff member or resource so they are unavailable [because of sickness, training or other reason], meaning that you can always be sure that the calendar overview reflects the true picture of your staff and resource availability.
- As the Labour Scheduling system is a multi-user, networked application that is directly connected to EMIR, it can be updated by several users at any time, meaning that you do not need to rely on just one staff member to perform the labour and resource allocation.
- Like our entire EMIR software range, the Labour Scheduling system is constantly updated so you can be sure it will continue to grow and improve still further!



Engineer/Resource	Monday 17/11/2008	Tuesday 18/11/2008	Wednesday 19/11/2008	Thursday 20/11/2008	Friday 21/11/2008	Saturday 22/11/2008	Sunday 23/11/2008
BK: Mr Brian King							
BSMTH: Mr Ben Smith							
JBLDGGS: Mr Joe Blagden	BOOKS UNITED PERFORMANCE SERVICES (PORTSMOUTH)	BOOKS UNITED PERFORMANCE SERVICES (PORTSMOUTH)	BOOKS UNITED PERFORMANCE SERVICES (PORTSMOUTH)	BOOKS UNITED PERFORMANCE SERVICES (PORTSMOUTH)	BOOKS UNITED PERFORMANCE SERVICES (PORTSMOUTH)	BOOKS UNITED PERFORMANCE SERVICES (PORTSMOUTH)	BOOKS UNITED PERFORMANCE SERVICES (PORTSMOUTH)
JBROWN: Mr John Brown	MANUAL Holiday	BOOKS BRITISH PUMP SERVICES (BPLD)					
MIG: Mr Michael Griffiths							
RR: Mr Robert Richards	BOOKS UNITED PERFORMANCE SERVICES (PORTSMOUTH)	BOOKS UNITED PERFORMANCE SERVICES (PORTSMOUTH)	BOOKS UNITED PERFORMANCE SERVICES (PORTSMOUTH)	BOOKS UNITED PERFORMANCE SERVICES (PORTSMOUTH)	BOOKS UNITED PERFORMANCE SERVICES (PORTSMOUTH)	BOOKS UNITED PERFORMANCE SERVICES (PORTSMOUTH)	BOOKS UNITED PERFORMANCE SERVICES (PORTSMOUTH)
SMARTIN: Mr Steve Martin	MANUAL Holiday	MANUAL Holiday					
SYSTEM: Mr Gary Downes							
TSIMMONS: Mr Tim Simmons			BOOKS UNITED PERFORMANCE SERVICES (UPM)				
USER: Mr Normal User							
(B) BAKER TEST EQUIPMENT			BOOKS UNITED PERFORMANCE SERVICES (UPM)				
(R) BALANCING (Balancing Test Equipment)							
(P) LORDEST LARGIE VAN WITH CHERRY PICKER							
(P) S123RTG - SMALL VAN							
(P) SCOS TYP - Medium Van							
(R) THERMAL Thermal imaging test equipment							



Time and Attendance [T&A]

The EMIR T&A extension allows you to capture the entry and exit times of your staff along with the actual 'live-time' recording onto jobs within your workshop.



All entries are created by simply scanning the appropriate barcodes, so no typing or mouse use is necessary.

Entry System

The entry system part of the application requires the user to swipe their user barcode badge at the entry/exit points of the works. The first scan is entry and then each subsequent scan toggles between exit and re-entry. Each transaction is printed to an attendance sheet, so at any time, a list is available of who is in and out of the building and this can be taken in the event of an evacuation of the building to provide a list of those still on site. There is also an Entry Viewer that shows the current status of each employee as to whether they are in/out of the building.

Live Time Recording [LTR]

The LTR function is simple in its use, as 3 scans at most are needed to record any activity, but can be configured to handle complexities of shift patterns, regular breaks, lunch periods, and bank holidays. It automatically knows whether an employee is working at time, time and a half or double time, etc.

Engineers are only allowed to log onto suitable 'work in progress' jobs and can record their time and current operation by 3 simple scans:-

- Their username badge
- The job number barcode
- The operation being undertaken

Simply by repeating the scanning process when the operation or job changes or the end of the day is reached, will result in EMIR recording completed entries into the EMIR Timesheet system. Manual update of times is therefore possible by amending the timesheet for the employee concerned.

The LTR means that managers can track the progress on a job in real time, and can also plan times for operations and jobs and then compare them to the actual times taken.

Equipment and Barcode labels

The barcodes required can be easily and inexpensively produced and terminals can be shared by cells of engineers, so the cost of implementation is low. Barcode scanners are required, and the T&A application runs on a windows-based PC, so a suitable PC is required [that is networked to the primary EMIR system].

“The main objective of the live time management system is to support the development of a performance driven culture by improving efficiency and workforce management systems, minimising human errors when recording time on jobs, enabling invoicing on delivery date and reducing admin time spent on labour recording. The EMIR T&A system is an invaluable tool that helps us to achieve all these objectives.”

Krystyna Malinowska,
Project Manager, Houghton International, Newcastle

The Time and Attendance extension has many useful features to help deliver real benefits to your business:

- Instant 'live-time' picture of who is on and off your premises along with a constantly updating printout that can be torn off and taken in the event of an emergency.
- No need for a keyboard or mouse in any operations. Everything is achieved by scanning barcodes. Easy to use and no effort to train staff in its use!
- Get an instant picture from your desktop of who is in/out by using the Entry Management Viewer.
- See how jobs are progressing in real time as job costing is updated at the completion of each operation, job or working day. This will ensure you know the true picture of your workload.
- You can schedule breaks in the working day, so that staff do not have to do any transactions to stop for lunch etc. The T&A system will automatically stop the current operation and restart it after the scheduled break is completed.
- You can create shifts against employees so the T&A system can record the appropriate time class against each entry. This will ensure that over-time is recorded and charged correctly.
- You can set-up bank holidays, or other public holidays, so that entries recorded that day are done so at the appropriate rates.
- Plan and analyse operations per job by setting planned operations and associated times. You can then compare the actual time recorded live against the planned to check on whether the job is progressing to plan or not.
- Time entries are still editable, via the EMIR Timesheet system, so you can still adjust the entries if you need to. Flexible and easy to use!
- As entries are recorded live, you can get an instant picture of workshop activity, and view what each engineer is currently assigned to at any time – without the need to leave your desk!
- Remove the need for paper timesheets by getting all the activity recorded as it happens. Get accurate costings for your work without the need to chase staff to fill in any paperwork!





EMIR^{PDA} is the ideal supplement to our EMIR Professional and Standard solutions and allows you to capture all the job related activity from your site engineers while they are off your premises.

EMIR^{PDA} has many useful features to help deliver real benefits to your business:

Instead of waiting on bits of paper to return to the office detailing expenses, labour hours, materials used, etc. the EMIR^{PDA} will allow your engineers to:

- Look at a list of jobs to be done with postcode information to help with directions
- View job information
- Record their hours worked by job and record an activity if required
- Record Mileage and other Expenses
- Record the work carried out
- Record any notes about the work that was done
- Fill in a safety checklist that is then stored in EMIR against the job's 'File' tab as a PDF file
- Create a 'Service Checklist' in EMIR and then complete it on the PDA with each option having a Pass/Fail or N/A tick against it. You can also then tick to show if additional work is required along with an order number and record whether the machine is safe to operate. The service checklist is then instantly available in EMIR and can be interrogated to show jobs that have failed a service item, or require further work, etc. This info is also returned as a PDF file to EMIR so can easily be emailed to the client for proof of the visit's findings.
- Get a customer signature to sign off for the work that has been completed - this is also stored as PDF within the EMIR 'Files' tab for the job

EMIR^{PDA} is a web-based system that links and indeed, talks directly to EMIR. It is designed to be run on a Personal Data Assistant device [PDA], and will work on any PDA that has internet access and web-browser functionality.

As the PDA website is purely text based, it is fast to load and can work fine off a simple GPRS connection from your mobile and absolutely 'flies' when using the latest 3G connectivity!

Even if your engineers don't have a PDA device with them, they can access the website from any computer to record their activity.

Put simply, EMIR^{PDA} removes the need for engineers to be filling in reams of paperwork [that may or may not arrive back in the office!] and allows you to see job information on an 'as live' basis.

The EMIR administrator can re-open jobs if he needs to, and all costings and other PDA recorded activity can still be edited and updated from with the EMIR Professional or Standard systems.

All in all, EMIR^{PDA} allows you to capture all the information you need from your engineers to ensure that job processing is smooth and transparent, whilst at the same time, ensuring that you still have total control of job costing information and which information is presented to the client.

For a demonstration of EMIR^{PDA} please contact us on:- 0845 009 4588

“At Wilson's, we provide many on-site services for our clients, and we wanted to ensure that we had the same control of those jobs as we do with our workshop jobs. By using EMIR^{PDA}, we can now ensure that this is the case and that our information is always up-to-date and accurate.”

Graham Brooker
Managing Director, Wilson Electric Ltd, Battersea.

- EMIR allows you to allocate jobs to engineers, complete with their site address and key job details, so that their work schedule is available via their PDA.
- At any convenient point the engineer can then update EMIR with all the key costs against the job. They can record their hours, expenses and any materials used which will directly update stock levels, ensuring your EMIR system is kept up-to-date even while your staff are at a customer's site.
- The engineer can also record any important notes or change of working requirements, and these are instantly updated in EMIR for all staff to see.
- At the end of the job, the engineer can complete a service checklist [if required] and get a customer signature for the work completed, which shows the customer the hours they have worked. This is effectively approval for the work completed and will be stored as a PDF file against the job in EMIR. This will certainly help with getting your invoice approved!
- With the growing need for risk assessments and Health & Safety checklists, the engineer can easily complete one on his PDA to ensure that this necessary documentation is completed and is again stored as a PDF against the job within EMIR.
- The EMIR^{PDA} website is not only for use by PDA devices, but can also be used by any PC with internet access, so even if your engineers don't have PDA's they can update EMIR from their laptops or home computers when they get the chance.

- EMIR instantly reflects any changes or updates made via the PDA system, but all of the information can still be changed or updated by key staff using the normal EMIR windows application.
- EMIR can report on which jobs the engineers have been assigned to, along with map details of the locations of the customer sites, so you always know where your engineers are supposed to be!
- All you need to run EMIR^{PDA} is a Windows server or other server that is capable of hosting web-based applications, and a broadband connection. The PDA devices are not provided, but can usually be obtained for FREE within a company phone contract.





Web Job Tracker

The EMIR “Web Job Tracker” extension is the ideal way to provide your customers with up-to-date information about how their jobs and orders are progressing.

Progress Status

In addition to the normal EMIR statuses, there is a new ‘Progress Status’ section where you can define a suitable list of statuses to represent the progress of the job to the customer. E.g. “Dismantled Awaiting Inspection”, “Awaiting Parts” or “Delivered”, etc. EMIR contains functionality to allow you to easily change the progress status of jobs, including options to update jobs, in bulk, via use of a barcode scanner.

Email or Console – it is your choice?

The start of the process can be simply an email generated by EMIR through your chosen email client such as Outlook™, Outlook Express™ or Live Mail™. The email contains a web hyperlink that the client can click on to see detailed information about the job/order being processed. The hyperlink is encrypted so it cannot be modified by hand to look at other jobs – only the specific item contained.

You can also allow highly-valued clients to access all their job information at once via the Website Console area [see below] by giving each contact a unique login.

Website Console

The Job Tracker website features a console area which allows the client contact to view his/her jobs in a variety of categories such as items requiring attention, jobs that are currently being worked on, jobs awaiting delivery, jobs awaiting invoice and those jobs invoiced in the last 90 days.

After selecting the appropriate list, the user can then drill-down to view the details of any job along with photo’s, related documentation and the current progress status. A one screen summary is displayed per job, showing activity on the job, including any key references and order numbers, etc. You can also add multi-media types to the information displayed if you want to show photos and videos of the item being tested, for example.

Customer Service Requests

In addition to seeing the latest information, the customer can also contact you to request more information by emailing you a request for more information, asking you to ‘nudge’ the job along [if they need it urgently] or requesting a phone call to discuss the job in more detail.

Update Emails

EMIR can also generate emails to the customer informing them of any jobs that have changed ‘progress status’.

Surveys

You can also create surveys from within EMIR by setting up 5 custom questions. The user can then click on any finished job via the console, or can be invited separately by email, to complete a survey for the job. The results of such surveys are captured in EMIR and can be analysed by one customer or all, and one department or all, to see how your work is being judged by customers, with EMIR giving graphical representation of the average scores achieved for each question. Surveys can be changed and replaced at regular intervals and their scores analysed separately.

“At Central, we pride ourselves on providing excellent customer service and keeping our customers informed of progress with their jobs. The EMIR Web Job Tracker allows us to provide our customers with useful and timely updates automatically as part of our job management process, and they can view this info 24/7!”

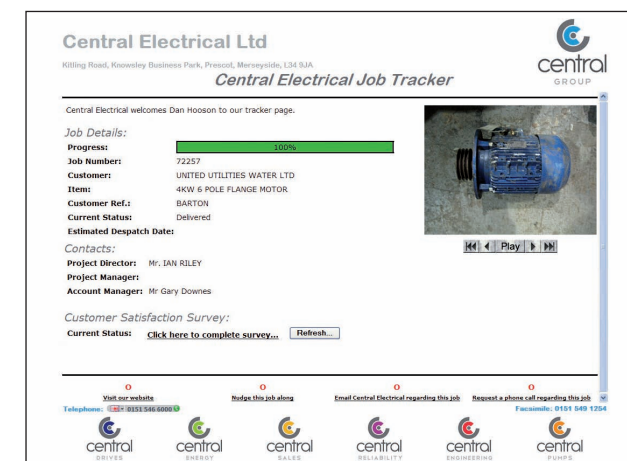
Shaun Sutton
Director, Central Electrical (AW) Ltd, Liverpool.

The Web Job Tracker extension has many useful features to help deliver real benefits to your business:

- The Web Job Tracker allows the customer to get the latest information about how all their orders/jobs are progressing without the need for a phone call or any direct involvement or other action from your own staff. So this saves you and your staff time in answering phone calls or chasing clients unnecessarily. The console also allows clients to complete surveys as to how you have performed on a job-by-job basis, so you can easily and directly measure client satisfaction.
- Gives the customer a detailed picture of progress - including photo’s of the work being undertaken, which will help justify the work required, as well as giving the client a clear picture of progress.
- Totally secure access, so that the client gets the information they require without being able to see any information that they shouldn’t!
- The web job tracker will allow the client to view Testing work via online videos, without the need for them to leave their office and at a time that is convenient for them!
- The job progress status helps you to organise your workload, so that you know what progress status each item is at instantly. So it’s not only better for the client, but also provides management with a better view of how the order-book is progressing and highlights any issues quickly.
- The client still has the option of requesting more information from you, but these requests are received electronically, which is less disruptive than constantly fielding phone calls and means you and your staff can simply get more work done with fewer interruptions!



- Whilst the web job tracker is an extremely powerful tool, it does not require huge expense to implement, with the hardware requirements limited to a Windows Server with a broadband connection. This is pretty standard for our customers with multi-user EMIR systems!
- There are very few companies who can offer the client an online enquiry system of such complexity and availability, so it will simply put you way ahead of the competition! Not bad for a system that just requires you to run your EMIR system as normal and will automatically provide the information the client needs via the web job tracker at their convenience, 24 hours a day, 365 days a year!





Winding Details Database

If you require a way of storing Motor Winding details to create a comprehensive database of Winding information, then this is the software for you!



Standalone Software

Our Winding Details Database [WDD] software is provided as a 'standalone' program [you don't have to have EMIR!] to allow you to record such details as found in the AEMT winding database, such as No. of Coils, Turns per Coil, Pitch, Connection, Leads, etc. and separate details for D.C. motors and Commutators, allowing you to store two configurations per motor [Configurations A and B].

You are also able to search via any and all of the winding characteristics, from Make, HP/KW, Volts, Amps, Hertz, Phase, Poles, RPM through to Core Id., Winding Type, Turns per Coil, etc. in order to be able to locate matching winding details and jobs that you have repaired previously. We've even thrown in 5 user-definable fields, [you can label them yourself!] so you have room to store any additional details that you can think of.

Advantages of using with EMIR.

If you do have EMIR, then there are even greater benefits to owning the software! You can easily and directly store the Winding Details against a current EMIR job for you to review, update and print, and these details are automatically added into the Winding database, at the click of a mouse, for fast retrieval by any of the winding characteristics, showing you both matching motors and previously matching jobs.

You can also search the Winding Database to find winding specifications for motors that have similar technical details [Manufacturer, Volts, Amps, Phase, Hertz and KW/HP ratings] to any job that you currently have in your system.

Having a database of Winding specifications, directly retrievable via use of EMIR, will save you lots of time over trying to find the hand-written documents, and will ensure you can safely 'back-up' the information electronically as part of the EMIR system.

In short, the Winding Details Database allows you to store all your Motor Winding details, and makes them available quickly via any method that you could want to find them!

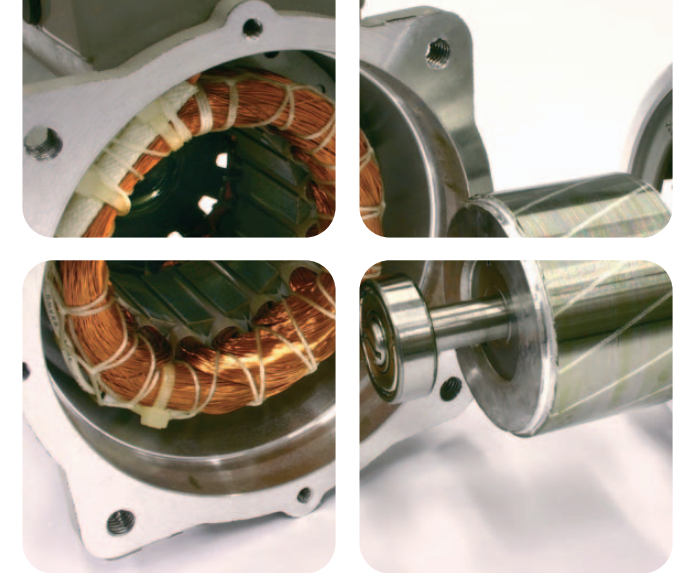
Set yourself apart from the competition by having a fast access storage system for all your Winding Data, and by using this as part of an EMIR implementation, you will have the cost and time savings involved with tying Winding Data directly to jobs and being able to search from within EMIR to find matching winding specs for your work.

“We find the Winding Details Database a valuable tool for our business, and together with EMIR, makes it simple to store winding data and to retrieve it quickly and easily.”

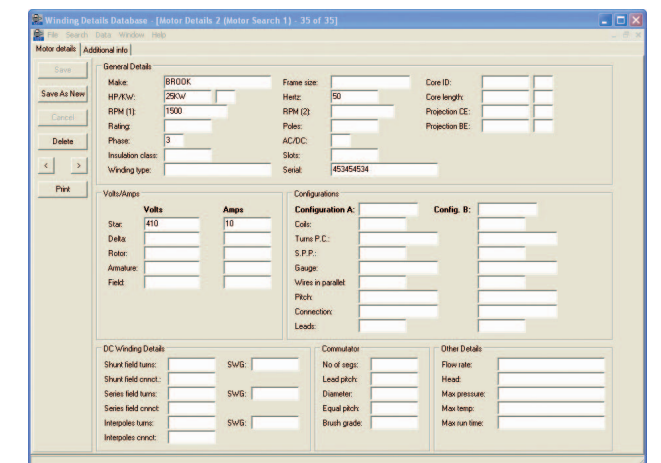
Jim Stewart
Managing Director, Stewart Rewinds, Glasgow.

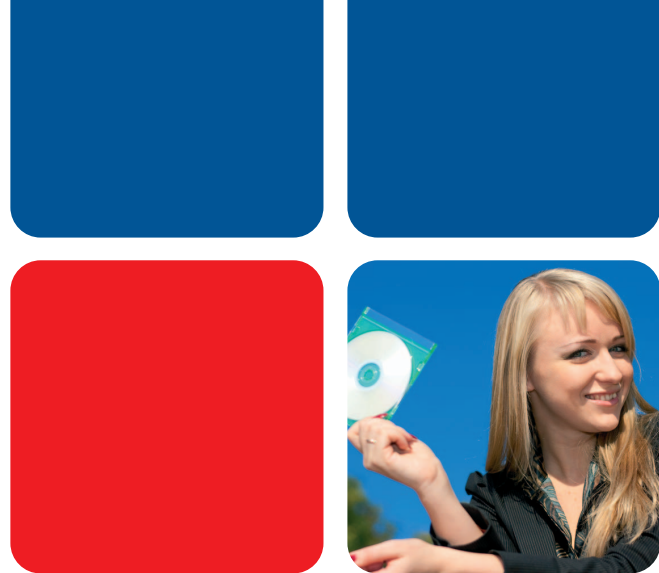
The Winding Details Database extension has many useful features to help deliver real benefits to your business:

- The Winding Details Database allows you to store and retrieve detailed Winding Specifications for any motors. This will save you lots of time compared to searching for handwritten paper copies of the same information.
- The database allows you to store detailed specifications as per the fields available and presented in the 'AEMT Winding Database' that is currently available from the AEMT, so you can be sure that the information stored will hold all the necessary data you need to be able to rewind a motor again in the future.
- As the data is stored electronically, you can easily backup the information onto a portable disk or as part of your EMIR backup, meaning that your data is safe in the event of a fire or other disaster.
- The comprehensive technical data can be searched via any of the 70 fields stored, so you can search to find matching information via any of the details that you have.
- The Winding Details Database not only allows storage and retrieval of information on AC or DC motors but also allows you to store Commutator, Bearing and other associated details for a complete picture of information.
- Whilst we believe that all the fields that you may need are provided for you, we have also given you 5 extra fields that you can re-label and make use of as you wish! So there should never be any reason why you can't store or find the information that you need!



- The Winding Details Database can be used as a standalone piece of software, separate from EMIR, but there are greater advantages to be had by using it in conjunction with EMIR, such as easier adding of information and easier retrieval of information directly from your existing EMIR details.
- In short the Winding Details Database is designed to make your life easier and help you to safely store and retrieve the important winding information that you have had to write on paper until now!





Web-CALS

The Web-CALS extension is designed to allow your customers to enquire on their managed motor/pump details via use of the Internet and Internet Explorer or other browser.

Easy Asset Management

Your customers can access the system whenever they like and have controlled and secure access to their own asset information. (You must be running the Asset Management module within your EMIR software for this extension to be applicable).

Data Availability

The Web-CALS system allows your customers to view their EMIR Asset Management data. Your customer can enquire by the location, technical details or key motor references to find out any information they need about their own motors/drives/pumps, etc:

- The Technical Details and References about each motor
- The current status of an asset as to whether it is active, spare or has been scrapped
- The Site, Location and Sub-location of where it is used
- The EX status and unlimited notes on EX related issues
- Unlimited Environmental information notes
- Unlimited General Notes about the item
- Additional comments [transfers to EMIR jobs]
- Photos of the Motor to help identification that also transfer to the job
- Link and access any type of associated file [Word™, Excel™, Text, CAD, etc.]
- Analyse fault information. Identify all the faults seen against the motor along with their frequency

- Track if a Managed Motor/Pump is surpassed by another or is surpassing another
- View all the jobs for the Managed Motor/Pump with status, price, delivery and invoicing details. In short, a comprehensive view of all activity undertaken on the asset.

Hardware Requirements

As the information is displayed via use of a website, it is essential that your EMIR system is based on a server that is capable of hosting a website such as a Microsoft Windows Server with its IIS web hosting platform. The server also needs to have its own fixed IP address and be connected to a broadband connection so that data can be transmitted in a timely fashion over the Internet.

“At Boxall's, we provide a vital Asset Management system for our clients. The Web-CALS system allows us to manage their assets fully and also allows the client access to the information whenever they need it.”

Ron Ransley,
Managing Director, T.A. Boxall Engineering, Surrey.

The Web-CALS extension has many useful features to help deliver real benefits to your business:

- Web-CALS allows the customer to get the latest information on their managed assets without the need for a phone call or any direct involvement or other action from your own staff. So this saves you and your staff time in answering phone calls or chasing clients unnecessarily.
- As Web-CALS is an online tool, it can also be accessed by your own engineers, to help identify the correct items to work on whilst they are on site.
- Web-CALS provides the customer with a detailed picture of their assets - including photos and location information, which will help them in identifying where their assets are located and what they look like. This is essential for identifying the correct items for repair work or maintenance tasks.
- Web-CALS provides totally secure access. The client can only view information relating to their own assets without being able to see any information that they shouldn't!
- Web-CALS provides comprehensive information on each asset, including detailed fault analysis, the number of times it has been repaired or maintained and all the relevant information they could require. Not only does it give instant access to the information, but you can rest assured that no sensitive costing information will be displayed, so they won't be accessing any price/profit sensitive information. It is also only read-only, so it cannot be changed or modified by the client directly.



- Whilst Web-CALS is an extremely powerful asset management tool, it does not require huge expense to implement, with the hardware requirements limited to a Windows Server with a broadband connection. This is pretty standard for our customers with multi-user EMIR systems!
- There are very few companies who can offer the client an online enquiry system of such complexity and availability for their key electro-mechanical assets, so it will simply put you way ahead of the competition! Not bad for a system that just requires you to run your EMIR system as normal and will automatically provide the information the client needs via Web-CALS at their convenience, 24 hours a day, 365 days a year!

The screenshot shows the EMIR Web-CALS interface. At the top, there's a header with the EMIR logo and 'Web-CALS'. Below this, there's a form with fields for Reference, Customer, Customer Ref, Manufacturer, Type/Description, Site, and Location. To the right, there's a section for Address, Modified, Serial, and Tag. Below the form, there's a table with columns for Job No., Received, Order, Contact, Price, Status, Date, Delivered, Del Note, Invoiced, and Invoice. The table contains several rows of data, including job numbers, dates, and prices.

Job No.	Received	Order	Contact	Price	Status	Date	Delivered	Del Note	Invoiced	Invoice
5007	14/09/2004	P01234	Mr. Joe Bloggs	500.00	Invoiced Serviceable	24/09/2004	24/09/2004	50017	24/09/2004	518293
5008	14/09/2004	343232	Mrs. Helen Bloggs	350.00	Invoiced Serviceable	24/09/2004	24/09/2004	50018	24/09/2004	518254
5009	14/09/2004	43543543	Mr. Joe Bloggs	0.00	Work In Progress	27/01/2006				
5040	14/12/2005	3646	Mr. Joe Bloggs	450.00	Invoiced Serviceable	14/12/2005	14/12/2005	50041	14/12/2005	518285



E-Commerce

EMIR E-Commerce is a complete solution for trading online. It combines the stock system and order processing capabilities of EMIR with a fully transactional Actinic™ website to get you trading online and also provides your customers with the same discounts, accounts and other details they have in EMIR.

Enhanced stock database within EMIR

Featuring photos against stock items, and other fields to enable online selling.

Fully transactional E-Commerce website

Customised to show your own company branding, details and content that you can either host on your own windows server or on a shared server [for a separate fee] – either way the ‘shop’ can link off your existing website if you have one.

Space for your own Marketing Information.

The E-Commerce website also features ‘content’ pages for your marketing and product information, so this could be the only website you ever need!

Linked directly to your EMIR data

Either an offline [import a file] or a direct and active link from the E-Commerce website to EMIR [own server required]. This means that your E-Commerce website is easily updated to hold all the same items as your EMIR system [a marker in EMIR lets the website know which products are available for sale on-line - you don’t have to sell everything!]

Order Processing in EMIR

Electronic retrieval of orders for Order Processing within EMIR.

Take Payment On-line

Integrated links to a payment provider are available [as required].

Track Delivery On-line

Integrated links to a carriage provider are available [as required].

System Requirements

As the information is displayed via use of an Actinic™ website, it is essential that you either have a server that is capable of hosting an Actinic™ website such as a Microsoft Windows Server with its IIS web hosting platform or that hosting is provided via a suitable Internet Service Provider. If you do host via your own server it is recommended that it has a fixed IP address and is connected via a high-speed broadband connection, so that data can be transmitted in a timely fashion over the Internet. However, because of the nature of 24-hour trading, and the need for the website to be available 24/7/365, it is recommended that a professional hosting and support is provided and this can be arranged for you by Solutions in I.T. Ltd.

“DSL can now drive the expansion of the business forward, confident that the EMIR software can support the growth whilst at the same time offering user-friendly and functional software.”

Cheryl Lockley

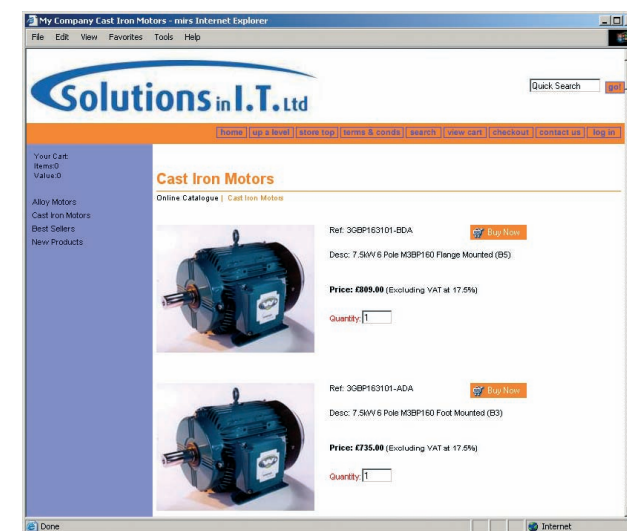
Managing Director, Detailed Services Ltd, Manchester

The EMIR E-Commerce extension has many useful features to help deliver real benefits to your business:

- This extension allows you to sell your stock directly via your own EMIR E-Commerce branded website. We'll design the store for you and you can load your products directly into the store via EMIR. The website also allows you to create and display marketing information, so in short, it is the only website you may ever need!
- The EMIR E-Commerce website provides detailed product pages with basket functionality allowing you to receive orders directly over the Internet to either known accounts or new customers paying by Credit or Debit Card [as required].
- Payments and order details are taken securely and on-line clearance for credit/debit card payments can be provided via many available online payment clearance services.
- Once you have received an order, you can download it into EMIR for immediate processing and stock allocation. There is no need to re-type any information and stock levels are kept current.
- You can start by creating accounts with usernames and passwords for all your existing customers and ensure that their discount structure from EMIR is available to them for their online purchases.
- If you wish to, you can also connect to on-line parcel tracking services provided by your courier so your customer can track delivery for themselves.



- There are very few companies who can offer the client an integrated E-commerce website of such complexity and availability, so it will help to put you ahead of the competition!
- The beauty of selling directly on the Internet is that it works for you 24 hours a day, 7 days a week and 365 days a year. It's a fantastic feeling to take orders while you are actually asleep!
- This is an ideal way to improve your export sales and find new customers, and to ensure your existing customers can find the products they need whenever they need them.
- Quite simply, this is an easy and integrated way to get into trading online, and because it integrates with EMIR, it minimizes the amount of effort you have to make to start selling online. Why not provide a 24-hour sales business to go with your 24-hour service!





CRM

The Customer Relationship Management extension, or CRM for short, is designed to give you a total picture of all activity related to improving your customer service and sales and marketing efforts.

Ultimate Sales Management Tool - Anywhere!

The CRM extension is the ultimate sales management tool and is great for both salespeople and business owners alike, allowing you to manage and measure all aspects of sales activity within your company. Also, as it is web-based, it is available from any device with an Internet connection, so can be used on the run, from home, in the office or just about anywhere! What's more CRM has unrestricted licenses and receives and updates EMIR totally live, so there is no duplication of data or effort.

Budgets

You can set annual budgets for Salesman by Customer and even have several salespersons with budgets for the same client [if they are selling different products/services to the same client]. Sales revenue and forecast sales can then be seen against budget to measure sales performance via customer, site, department and sales person. Not only that, you can set budgets for the following year simply by applying a percentage increase on this year's budget – so no need to type it all in again!

Sales Pipeline

Not only are orders and revenue tracked, but all aspects of outstanding quotes and opportunities are too. Such future sales are measured by time-scale and a percentage of probability that they will turn into orders, so the sales person can forecast likely sales and track all opportunities from within the CRM system – giving you a view of the pipeline for your entire organisation.

State of Play

Each salesperson is able to see an instant picture of how they are doing and all the tasks they need to do whether it is producing quotes, following-up existing quotes, arranging meetings, developing opportunities, etc. They can instantly see which order numbers need chasing, which customers are on stop, or how a customer is performing against budget or their credit limit.

Total Management Control

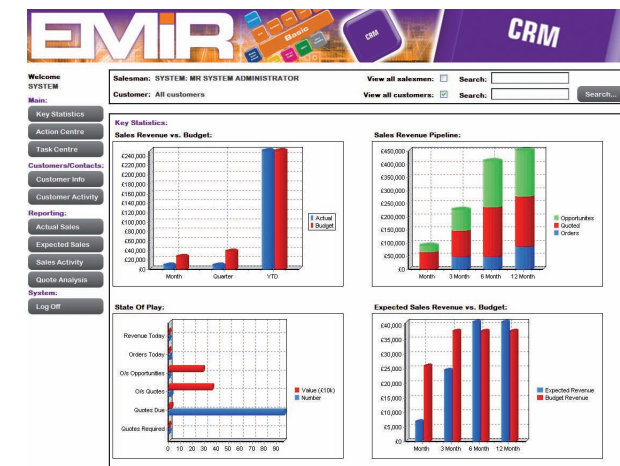
As a manager you will not only be able to see an individual salesperson's progress, but you can also see an overview of how the business is performing by Site, Department and Customer – giving you a 360-degree view of the sales activity of your company. In addition to measuring sales performance in both revenue and order terms, you can also see what activities each salesperson has undertaken – who he has seen, called and emailed, to give you a total picture of completed and required sales activity within your company.

Customer Details

Simply the most comprehensive customer records you have ever seen, with instant analysis of all past work, current orders, revenue and work in progress. You have instant access to contacts and to be able to book meetings and send emails via the CRM that are posted automatically into your Outlook or Exchange 'Sent Box' and Calendar. In short, everything a sales person needs to do can be tracked via the CRM system and can be analysed and reported on!

The CRM extension has many useful features to help deliver real benefits to your business:

- The “Key Stats” graphical home page informs your sales staff instantly on how they are performing, both in terms of Revenue and Order Pipeline versus budgets and summarising the activity needed currently.
- Manage your customer contacts closely and keep track of all activity related to them, ensuring you know exactly how each contact is being managed.
- Track all your quoting activity and ensure you know what stage of the process each quote is at. Measure the effectiveness and productivity of each salesperson in turn and analyse the effectiveness of their efforts.
- Track all key activity by customer and measure your performance in all areas of your business activity relating to customer service. Identify jobs that have stalled, quotes that need to be chased, identify further opportunities for quoting, and follow-up on any comments or complaints that have been made.
- Track revenue generation by sales person, site, customer and department and ensure you know the depth of your pipeline and conversion rates of opportunities.
- Identify those clients who need attention with an automatic reminder for sales staff when a customer has been inactive for longer than a set pre-defined period or set a period of how frequently you want each customer contacted, regardless of their account activity, and the appropriate salesperson will be prompted to contact them accordingly.



The screenshot shows the EMIR CRM dashboard. It includes a sidebar with navigation links like 'Key Statistics', 'Task Centre', 'Customer Contacts', etc. The main area displays several charts: 'Sales Revenue vs. Budget' (bar chart), 'Sales Revenue Pipeline' (stacked bar chart), 'State Of Play' (horizontal bar chart), and 'Expected Sales Revenue vs. Budget' (bar chart). There are also search filters for salesmen and customers.



**Market-leading business management software
for the electro-mechanical industry.**

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