

ards

Winding
Details
Database

E-Commerce

Financial
Interface

Stock

Purchasing

Quoting

Finance

Asset
Management

Web-C

Basic

Time &
Balance

Web Job
Tracker

Smart Site

Labour
Scheduling

CRM

Task

EMIR
Electro-Mechanical Information Resource

WHY UPGRADE TO PRO?
BENEFITS GUIDE
JANUARY 2021

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Section 1 - Why Upgrade to Pro?

This document outlines the differences in functionality when an EMIR user moves from Standard to the flagship product, EMIR Professional. The first section of this guide is an overview of the benefits with the corresponding detail of each Module in section 2.

What are the Key Differences?

- **Allows Multi-Branch Operation to Track Jobs, PO's Quotes, Stock and Finance:**
 - Can also be used to break a single branch into separate profit centres and have separate financial profit and loss statements for each department.
- **Multiple Job Types:**
 - Greatly enhanced Repair job type featuring lots of new functionality.
 - New Sales job type for streamlining sales of new items and spares.
 - Build/Assembly job type for construction of assemblies with a 1-click option to set up a job specific to build the item required.
 - New Hire jobs type that allows you to set a hire fleet of units and charge by period for their hire to clients.
- **Multiple Quote Types:**
 - Enhanced Repair quote type featuring planning tabs and more.
 - Separate quote type for direct sales of units or spares.
 - Enhanced File-based quotes with planning options and related files.
 - New Hire quote type allowing the listing of hire units and costs for their hire over defined periods.
 - New Merge facility to take Repair, Sales and Hire quote types into Word for enhanced layout capability and to aid quote version tracking.
- **Greater Job Costing Functionality:**
 - Wider range of labour rates and calculations.
 - Instant profit analysis on main tab of the job.
 - More flexible material pricing and prices per customer.
- **Improved Planning Capability for Jobs:**
 - Set budgets, define and plan labour ops and plan required materials.
- **EMIR Triggers to Inform you of Activity:**
 - Internal email system informs staff as events happen in the system or need to happen such as reminders for quote chasing, credit checking, etc.
- **Action Requests:**
 - Define tasks and link them to jobs and staff and keep track of when they are completed.

- **Tracking by Salesman across Jobs, Quoting and Revenue:**
 - Now you can report all key activity by salesman.

- **Customer and Supplier Complaints System:**
 - Track any non-conformities and complaints within your EMIR system. Ideal for meeting your ISO requirements.

- **Employee Skill Database:**
 - Another ISO box-ticked! Track all your skills by engineer to produce a skills matrix for your company and identify any staff training that is required, due or expired.

- **Enhanced Reporting and Enquiries:**
 - Every module has new enquiries to give you the information you need when you need it.

- **Prospective Customers, Cash Customers and much, much more:**
 - Don't just manage customers, but also prospects and handle cash accounts more vigorously with checks for payment for delivery.

Section 2 - Detailed Features and Benefits by Module

Basic Module for Job Management.

- **Main Tab – New Fields/Functionality:**

- Now has ability to track a Site/Branch/Profit Centre code.
- Site Work/Service Centre tick boxes to identify where the work is taking place and EMIR allows you to enquire on site work or service centre work separately.
- Customer account status. Set a financial customer status so it is obvious to your staff what payment terms the customer is on at job level.
- Dropdown “Work Description” field. This allows you to setup categories of work types and then you can analyse jobs of a similar kind across the customer base.
- Job Accepted Date which allows you to analyse the time from the job being booked in until the job has the go ahead via an accepted quote.
- Job Type which allows you to select Repair, Sales, Stock Build or Hire as appropriate to the work required on the job.
- Project Manager field allows you to select a project manager per job and then narrow down active jobs for a project manager, so you can just analyse your own jobs.
- Cost Summary gives a profit breakdown on the job while it is in progress so you can instantly see how the job is progressing.
- Job timeline at the bottom of the form to show how long the job has spent in each part of the process and how long it has taken to complete.

- **New Main(2) Tab:**

- Pro forma tracking, so you can see if a Pro Forma Invoice has been issued against the job and whether it has been paid without going into accounts.
- Invoice paid info, shows whether the invoice has been paid, without needing accounts access.
- Invoice bank details, so you can actually set up separate bank account details and choose the ones to print on that job’s invoices.
- Fault Tracking allowing you to record a primary fault against the job, which can be mandatory, and then shows on the Fault Analysis enquiry which summarises faults per client.
- Comments/complaints market which shows if this job is the subject of a customer comment or complaint which you may also use in the case of Warranty claim.
- Apply credit card charge tick-box which, if ticked, will add a charge onto the invoice based on a percentage of the job value.

- **Enhancements on the Tech Tab and a new Tech 2 Tab:**

- Job locations allows you to store/set a series of workshop locations and track where the job is for easy identification/location of the job.
- Asset management info which links the job to a managed asset and allows you to swap assets and set fault information for the asset.

- Separate tech templates [searchable] so you can enter tech details for AC motors, DC Motors, Gearboxes and Pumps.
- Repair report which allows basic test results and comments.
- **New Testing Tab:**
 - Record brief details of any tests carried out on the job and whether they have passed or failed. The last test must pass for EMIR to allow you to deliver the item. Testing can be optional or mandatory for a department and only defined users can record test details.
- **Enhanced Labour Costs Tab with New Expenses Tab:**
 - Option to sort data by date labour recorded or by operation carried out.
 - Option to view summaries for engineer [total hours on the job] or by operation [total hours per operation].
 - Record Expenses using standard rates, such as Mileage, Meal allowance, etc.
- **Enhanced Work Done Tab:**
 - Use the work done/operation list in a free text option of unlimited size.
 - Now features a WYSIWYG (what you see is what you get) style so it prints as it looks on the screen.
- **Enhanced Spares Costs Tab:**
 - Option to load required items either by hand or via a Bill Of Material so you can define a kitting list for a job. Also, makes it very easier to use all required items in stock or buy those that are out of stock on a job-related PO [just a few clicks].
 - Greater details info on each spares line showing supplier info, due date for PO's, etc.
 - Colour coding to help you identify which items still need processing and which ones are used and finished with.
 - Many right-click options allowing you to link off to stock part record, or stock part summary, put job parts into stock [if they are not required on the job], and much more!
- **New Photo Thumbnails Tab:**
 - Shows a thumbnail of all photo's recorded against the job so it is easy to see the photo you want in more detail.
- **Enhanced Files - Folder Assignment and Auto Job Folder:**
 - You can link the job to an existing documents folder so that it is simple to attach standard documents to a job E.g. Risk Assessment docs.
 - Drag and drop into job folder. Instead of linking files to a job one at a time, you can drag and drop [or copy and paste] files into the job folder using Windows Explorer.

- **New Action Requests Tab:**
 - Create and set tasks against staff that relate to the job and review all open and completed tasks for the job easily. Users are alerted to Open tasks when they log into EMIR and can check on their own tasks via a speed button at the top of EMIR at any time – the icon is red if tasks are overdue or blue if within time.

- **New Applications Tab:**
 - This allows you to create “payment requests” for a job and allows you to record variations and retentions on a contract. Ideal for “contracting” type work.

- **Delivery Notes Tab:**
 - You can now produce multiple delivery notes per job.

- **New Planned Operations:**
 - This allows you to define a list of operations using work done codes. You can set times and dates for each operation and see progress in terms of actual time recorded versus estimated for each operation.

Quoting Module

- **4 types of Quote: Repair, Sales, File and Hire and also the ability to Merge into Word**
- **Repair Quote Type:**
 - Has a user editable pre-defined list of Terms & Conditions for the quote covering validity, delivery and more.
 - Header tab shows a Cost Summary so you can see from the planned labour and materials on the quote, what the margin/profit will be.
 - Allows the user to set a Follow-up date and optionally a “Chaser” if it is going to be chased by someone other than the salesman.
 - Track whether the quote is a “Referral” and also when the quote is complete and ready to send [as opposed still being worked on].
 - You can now link a quote to a Site/Business Unit & a Department.
 - The Pages tab has separate tabs within for recording labour, materials and other details and has separate Accept/Reject buttons.
 - There is a Note Tab for the quote to record any pre-quote or follow-up conversations with the client or internal notes – each note is a separate entry.
 - You can record a Failure Reason against the quote and EMIR allows analysis of failures.
 - The quote has its own Files tab and auto-generated Quote folder to drag and drop related documents.

- **Sales Quote Type:**
 - This quote will list Parts, so has a separate Parts tab instead of pages – shows current stock level when you add items onto the quote.
 - Accepted quotes will allow the quoted Parts transfer to the job as required items – ready for processing.
 - You can add extra description as “Item Text” for each part displayed and this can be pre-loaded from the part number’s extended notes description.
 - Automatically creates price from charges of spares, so you don’t need to manually enter a price.
 - Also has a Notes tab, Failure Reasons and Referral and Complete tick-boxes as per repair.

- **File-based Quote Type:**
 - Has spares and labour tabs for planning and transferring to jobs.
 - Also has a Notes tab, Failure Reasons and Referral and Complete tick-boxes as per repair.

- **Hire Quote Type:**
 - Hire parts instead of stock parts for period of hire.
 - Automatically calculates price from hire item charges.
 - Hire parts will transfer to the Hire job when the quote is accepted.
 - Also has a Notes tab, Failure Reasons and Referral and Complete tick-boxes as per repair.

Stock Module

- **Enhanced Stock Part Data:**
 - New fields to hold latest cost [from PO’s] and weighted cost [auto calculated].
 - New labour cost fields for a part if it is a built item.
 - Marker to enable Serial number tracking whenever a part is received or sold.
 - “No stock” marker allows you to hold a stock part, but not keep stock levels against it, such as stationery, toner, etc.
 - You can provision and keep separate min/max levels per branch.
 - There are 3 types of “Extended Notes” against a stock part to keep detailed descriptions that are for (1) Internal Use [Job Cards], (2) Customer Use [Invoices and Quotes] and (3) Supplier use [appear on PO’s].
 - Stock profile holds extra details for orders placed, items being built and items still required.
 - Many enhanced enquiries and reports for the Stock system.

Purchasing Module

- **Enhanced Purchase Order Information:**
 - Supplier contacts and can have site/branch addresses per supplier, so you can use the same purchase ledger account but order from separate branches.
 - Wider range of PO approval options.
 - Purchase Order Version number tracking allows you to keep control of PO revisions with approval at each stage.
 - New tick-boxes for
 - Paid by credit card [shows when you approve an invoice so you don't pay it again].
 - Urgent market to allow you to identify critical PO's and enquire on them separately.
 - Subcontracted PO's to define PO's where an item has been sent to a sub-contractor.
 - PO's can be saved initially as Requisitions and sent out for prices from Suppliers.
 - Combined PO's allow you to mix job and stock purchases on one PO.
 - Track when date dues are confirmed by supplier for traceability and vendor performance.
 - Extra tab shows invoices logged against the PO, with the ability to open the scanned invoices.
 - Many extra enquiries and reports.

Finance Module

- Multi-branch so separate P&L for each site or business unit.
- Multiple bank accounts that you can reconcile individually.
- Cash-flow forecast automatically produced from sales and purchase invoiced information.
- P&L Budgets to allow actual versus forecast across all Nominal Ledger codes.
- Part match of payments. Don't have to put them as deposits, but can part-match an invoice instead.
- Scanning of invoices to log against the Invoice entry in the Purchase Ledger and any matched PO.
- Logging of invoices is streamlined and more flexible – especially foreign currency invoices.
- Days to pay reporting.
- Many enhanced reports.