EMiR Software – Task Centre Governance Pack

The following tasks are included and can be setup for your use when you purchase EMiR Task Centre.

These tasks are aimed at improving workflow within the business by providing **notifications** and reports automatically to staff, customers or suppliers.
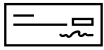
Job and Order Management Reports and Alerts

High Value Order Email Notification

This task, designed to run on receipt of jobs/orders into EMiR, sends an email alert to notify specific staff when an order has been received that is deemed to be of high value – as set by the EMiR system administrator.

EMiR will allow you to set different users to receive this new order notification based on the size of the order received. Recipients will receive an email outlining the details of the order including the customer, contact, description and value details.

Jobs Completed Today Email Notification

This task, designed to run at the end of each day, sends the customer a summary email to outline all the jobs completed that day.
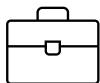
EMiR will automatically send this email to the job contact, providing the job contact has an email address. The email lists a summary of all the jobs where engineering work has been completed and the status of those jobs is Finished Goods.

Despatch Email Notification

This task, designed to run automatically when items are despatched, sends an email notification to the job contact with details of the job/items that has been shipped.

EMiR will automatically send this email to the job contact, providing the job contact has an email address, when a delivery note is produced for the job. The email lists the job details and the items on the delivery note.

Jobs Booked In Email Report

This task, designed to run first thing, sends an email to specified members of staff with a report on jobs raised on the previous day, or if there were no jobs raised on that day.

EMiR will automatically send a report to a group of users to ensure they are aware of new orders raised the previous day so that they can be scheduled or processed accordingly. The email contains a CSV report attachment listing all the key details of each job/order.

Quoting Reports and Alerts

Quote Chasing Email Notifications

This task, designed to run weekly, will email Customers with a list of o/s quotes asking them for a response, if they wish to proceed.

EMiR will automatically send this email, listing details of all o/s quotes that are passed their follow-up date, to the customer contact on the quote. The email contains a table of all the quoted items and asks the customer to update them as to whether they wish to proceed.

Purchasing Reports and Alerts

Overdue Purchase Order Items Email Notification
This task, designed to run daily, will email suppliers with a list of overdue purchase order items that should have been expected to arrive by now.

EMiR will automatically send this email, listing details of overdue items on Purchase Orders to chase suppliers for a reason as to why the items are late/haven't arrived as yet. The email contains a table of all the overdue items for each supplier [to their default contact].
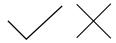
Purchase Order approval from Email (with Accept/Decline)
These tasks will send a selected Approver an email to inform them of a Purchase Order that requires approval and then facilitate PO approval/denial through the Task Centre web app.

The PO raiser can right-click in EMiR to send an email to a chosen Approver. The email contains a summary of the PO. On receipt of the email, the approver can choose to accept or reject the approval and the PO raiser will receive an email back with the result of the approval process.

Stock Reports and Alerts

Stock items below minimum stock
This task, designed to run twice daily, will email staff with details of any parts that have gone below minimum value – either manual minimum or EMiR generated minimum.

EMiR will automatically send this email, listing details of any items below minimum stock. The email contains a table of all the items and is sent to a designated user group.

Financial Reports and Alerts

30, 60 and 90-Day Alerts for Outstanding Sales Invoices
This task, designed to run daily, aimed towards internal finance staff, gives notice when an outstanding invoice has just gone over 30, 60 or 90-days due.

EMiR will automatically email this notification to internal finance staff, so they are aware of when an invoice moves into the next "Aged" bracket, which is the optimum time to chase an invoice for payment. There are 3 emails sent, summarising all the o/s invoices moving into a new aged period.

Action Request Reports and Alerts

New EMIR Action Request Email Notification
This task, designed to run hourly, sends an email to the Task Recipient as an additional notice outside of EMIR when a user has a new action request on them.

The email contains details of the Task, so that the user is aware of the Action Request even if they are not currently logged into EMiR.