EM8 CORE

Quick Guides

One page per task. Print them, pin them up, hand them out.

Fifty-seven everyday jobs in EM8 Core, each on a single page. For the full detail, see the EM8 Core User Guide.

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Engineer M8 · em8portal.com

What is in here

Each guide stands on its own. Give a new starter the three or four that match what they actually do rather than the whole pack.

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1. Log a job

Who does this	Where it lives
Office	EM8 Core → Jobs → New Job

Do this

1. Click New Job. If the caller has given you the site, open the site record instead and click Log Job — the customer, address and asset list fill in for you.
2. Choose the Customer, then the Site.
3. Choose the Job Type. This is one of your call types and it sets the priority, the billing default and which forms the engineer gets.
4. Type a short Job Title — this is what people see in lists.
5. Write the Fault Description in the caller's own words. Detail here is what stops a second visit.
6. Check the Priority and change it if the caller has told you something the job type does not know.
7. Set Scheduled At if you already know when it is going. Leave it blank if not.
8. Add the customer's PO Reference if they have given you one — it carries through to the invoice.
9. Save. The job gets a number and lands in Open Jobs. Whether it is charged is decided later, on the Billing list — there is no billable switch to set here.

> **Tip:** A job with no site cannot be logged. If the customer is new, add the customer and site first — guides 6 and 7.

2. Assign a job and put it in the diary

Who does this	Where it lives
Office	EM8 Core → Jobs or Diary

Do this

1. Open the Diary and find a gap in the right engineer's column.
2. Drag the job from the unassigned list onto that slot. That assigns it and books the time in one move.
3. Or, from the job itself, click Assign Engineer. You must give it a date and time, and choose how long to allow — the job then appears on the diary at that length.
4. Drag the entry later to move it, or drag its edge to make it longer or shorter.
5. The job moves from Open to Assigned and your SLA response clock stops.
6. The engineer gets a notification on their phone and the job appears in their list.

> **Worth knowing:** Engineers are notified on assignment, reassignment, unassignment and when you move the scheduled time. If an engineer has not installed the app yet, still ring them for anything urgent.

Taking a job back off an engineer

On the job — click Unassign. It returns to the unassigned pool and the engineer is told it has left their list. The date stays, so the work is still planned for that day.

On the diary — right-click the job tile. Unassign engineer does the same. Remove from diary clears the time but leaves the job with the engineer.

Jobs booked with no engineer against them always show in the Unassigned column, even when you have filtered to particular engineers, and in the amber list at the top of the Unscheduled panel.

Longer than a day, or a day they do not work

Give Assign Engineer the total hours and anything over a working day is booked as one visit per day. The days it picked are on the job's Visits card — guide 21.

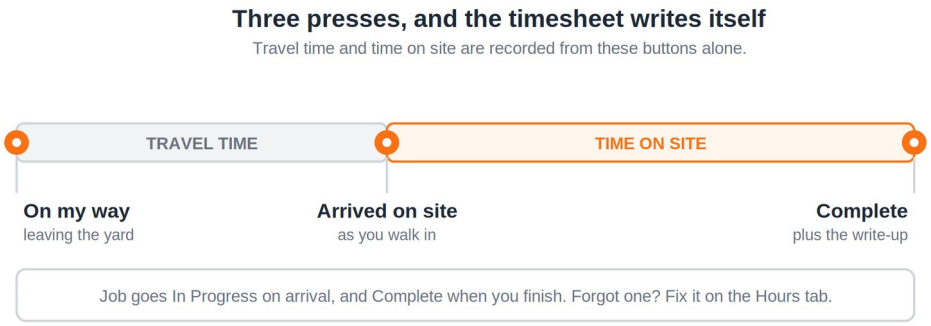
If the date falls on a day the engineer does not work, the assignment is refused and the message says which days they are off. Their working days are set on Settings → App Users.

3. Working a job on site

Who does this	Where it lives
Engineer	EM8 HQ app on your phone — guide 19

Do this

1. Open the job and press On my way as you set off. Travel time starts. If you have other jobs at this site, leave Also for my other jobs ticked and one press covers them all.
2. Read the Site Alert before you get out of the van — dog on site, report to gatehouse, no lone working.
3. Press Arrived on site as you walk in, not later. The on-site clock starts and the job goes In Progress.
4. Check Installed Kit and the site documents so you know what you are working on before you open anything.
5. Open the Forms card and work through each form, adding photos where they are asked for. Submit each one — a mandatory form left unsubmitted stops you completing the job.
6. Take Photos of the work from the Photos card, and add Notes for anything the office needs to know.
7. Parts and labour: put parts used on the form. If they need pricing on site, raise a Quick Quote — guide 13. Otherwise the office adds the charges from your write-up.
8. Spotted extra work? Raise a Quick Quote there and then — guide 13.



Habit to build: Press Arrived on site as you walk in. It costs two seconds and it is the difference between an hours export that is right and one someone has to correct.

4. Complete and write up a job

Who does this	Where it lives
Engineer	EM8 HQ app → Job → Complete

Do this

1. Submit every form on the job. If one is mandatory and still unsubmitted, Complete is greyed out and a red notice names it.
2. Press Complete. It is one screen.
3. Write up Work carried out — what you found, what you did, what is still outstanding. If your form already said it, it is here already.
4. Add Recommendations.
5. Sign it yourself. Your signature is required.
6. Hand the phone to the customer for their sign-off and type the name of the person signing. This is optional, but do it whenever there is someone to sign.
7. Tap Complete. The clock stops and the job goes to Complete for the office to check. On a maintenance visit the next service date moves on by itself.

If you are coming back

- Do not press Complete. Use Left site — return needed. The clock stops and the job stays open.
- A new visit is recorded when you return, so both trips show on the timesheet.
- Put the reason in Notes — waiting on parts, no access, customer decision — so the office can chase it.

> **Note:** Only the assigned engineer can complete a job. If there is no Complete button, the job is on someone else — ring the office. And you do not type your write-up twice: whatever went on the form is carried onto the job.

5. Check and send a job to billing

Who does this	Where it lives
Office	EM8 Core → Jobs (Complete)

Do this

1. Open the completed job and read the write-up, forms and photos. Anything on a form is already on the job, so read it once.
2. Check the charges. Add anything missed, remove anything that should not be billed.
3. Check the PO reference is on there if the customer needs one.
4. Click Send to Billing. The job moves to Ready to bill and appears on the Billing tab.
5. If nothing should be charged, still send it to Billing. Close without charge is on the Billing list, beside Create Invoice, and asks for a reason — guide 14.

Job route: Open → Assigned → In progress → Complete → Send to Billing → invoice or close without charge.

The engineer completes the visit; the office reviews it and sends it to Billing.

Changing a status by hand

There is no status dropdown. Put on hold, Resume, Mark In Progress, Cancel (reason required) and Re-open are buttons on the job header. Complete, Ready to bill, Invoiced and Closed are only reached through their own buttons — nothing closes a job by editing a field.

Automatic job sheets: If the customer has Auto-send completed job sheet ticked on their record, the job sheet is emailed to them the moment you click Send to Billing — once per job, so invoicing it later does not send a second copy. Every send is logged on the job, successes and failures both, so you can prove it went. Guide 27 covers sending one by hand.

6. Add a customer

Who does this	Where it lives
Office	EM8 Core → Customers → New Customer

Do this

1. Enter the Customer Name and the main contact's name, phone, mobile and email.
2. Enter the billing address — address line 1, town and postcode.
3. Add an Invoice Email if invoices go somewhere different to general post.
4. Set VAT Registered and enter the VAT Number if it applies.
5. Set the Credit Limit and Credit Days if they are on account.
6. Tick Auto-send completed job sheet if they want the paperwork emailed to them the moment a job is sent to billing.
7. Set Status to Active and save.

Reminder: A customer is who you invoice. A site is where the work happens. One customer can have hundreds of sites — add at least one before you can log a job.

7. Add a site and fill in its record

Who does this	Where it lives
Office	Customer → Add Site, or EM8 Core → Sites

Do this

1. Click Add Site from the customer record so it is linked to the right account from the start.
2. Enter the site Name and the full address. The postcode matters — it is what puts the site on the map for scheduling.
3. Add the Fire Authority if that is relevant to your discipline.
4. Save, then work down the panels on the site record.

The panels worth filling in

Panel	What to put in it
Contacts	Caretaker, facilities manager, key holder — with phone numbers.
Assets	Now shown under Equipment & cover, alongside each system's schedule and the contract paying for it. Add and edit systems here — every system needs a Discipline.
Maintenance Contracts	Also under Equipment & cover. Contract dates, value and visit frequency — guide 9.
Site Documents	As-fitted drawings, risk assessments, O&M manuals, old certificates. Upload, or drag files straight onto the panel.
Site Alert	The warning that pops up whenever anyone opens the site. Flag High Risk if needed.
Linked assets	Link Surveillance Guardian for monitored CCTV kit. Add fire-safety devices directly under Equipment & cover; see guide 29.

A contract records whether it covers maintenance (somebody attends), monitoring (an ARC watches, nobody attends) or call-out cover only. Only maintenance contracts need a visit pattern, so a monitoring line with no visits per year is correct rather than a gap.

When you add or edit a system on Equipment & cover, four settings do the real work: its Discipline (required — Fire Alarm, CCTV, Sprinkler, AOV and so on, which is what forms, SLAs, certificates and reports key off), whether it is Maintained at all, which Contract pays for it, and how often it is due. Linking a system to its contract is what lets the site show the money and the work side by side — and it is what the custom reports check when they look for charges with no schedule.

> **Tip:** A site with no postcode can never be scheduled automatically. It is the one field not to skip.

8. Add a system to a site

Who does this	Where it lives
Office	Site record → Equipment & cover

Do this

1. Open the site and go to the Equipment & cover tab. It lists every system on the site with its schedule, the contract paying for it and its equipment.
2. Click Add system. Give it a name and set its Discipline — Fire Alarm, Intruder Alarm, CCTV, Access Control, Emergency Lighting, Sprinkler & Suppression, AOV and so on. It is required, and it is what the forms, SLAs, certificate standards and reports all key off.
3. Set whether it is Maintained. A new system starts Not maintained — leave it there for install-only kit, or turn it on for anything on a service schedule.
4. If it is maintained, choose the Contract that pays for it and set the service interval and visits per year. Linking the system to its contract is what lets the site show the money and the work side by side.
5. For monitored CCTV kit, click Link Surveillance Guardian and select the matching site. Add fire-safety devices directly in the Fire-safety equipment panel; you do not create or link a separate FireLog site first.
6. Save. The system shows on Equipment & cover and, once maintained and dated, is picked up by the monthly maintenance extract.

Do this before the contract: A maintenance contract maintains a system, so the system has to exist first. Add it here, then set it up on a contract — guide 9. Linking the two is what makes the visits and the invoicing line up. A system with no Discipline, or a maintained one with no contract, is exactly what the custom reports flag.

9. Set up a maintenance contract

Who does this	Where it lives
Admin	Site record → Maintenance Contracts

Do this

1. Open the site and go to the Maintenance Contracts panel. Add a contract, or open an existing one to edit it.
2. Enter the Contract Name, Start Date and End Date.
3. Enter Visits Per Year. Any number — 1, 2, 4, 6, 12 or anything else. Put 0 if the contract buys no visit: monitoring, a router rental, any standing charge.
4. Set the First Visit Month. From that and the frequency, EM8 works out the rest of the year: 4 a year from January gives January, April, July and October.
5. If the visits are not evenly spread, fill in Visit Months instead with the actual months, for example 1,4,8,12.
6. Enter the Annual Value, the Invoice Frequency and the First Payment Date. These drive the invoice run, not the visits.
7. Save. The contract now produces visits and invoices on its own.

Add the system first: A contract maintains a system, so the system has to exist before you can pay for it. Add it on Equipment & cover — guide 8 — then link it to this contract.

This is the one that matters: A contract with no visits per year and no visit months can never generate a visit. The customer pays and nobody is ever sent. Those contracts are listed every time you run the extract — clear that list.

Zero is not blank. 0 and blank are not the same thing. 0 means somebody has decided no visit is due, and the contract drops off the extract's problem list. Blank means nobody has said yet, and that is exactly what the list is for.

Cancelling a contract

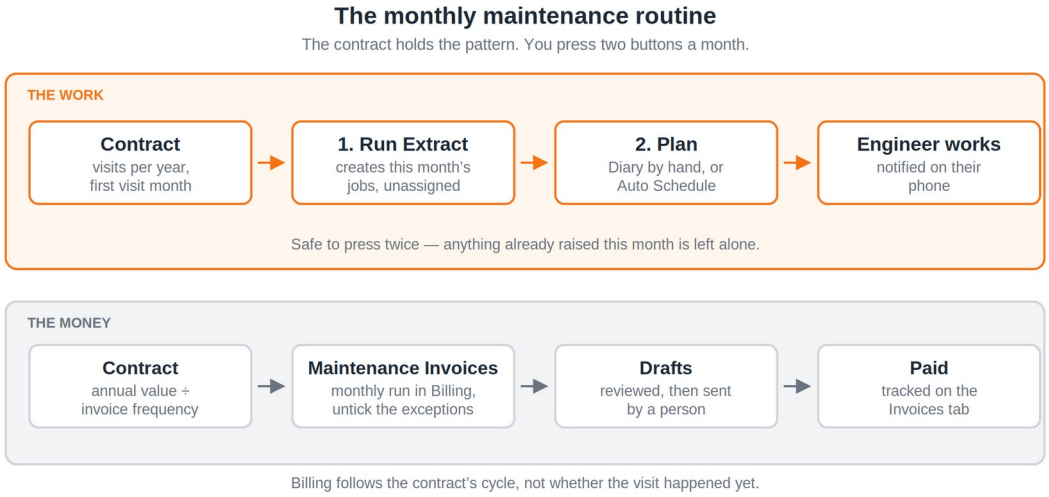
Set its status to Cancelled and the systems it was paying for come off maintenance in the same save — unless another live contract on the site still covers them. The portal tells you which went. Reactivating a contract does not put them back: edit each system, tick Maintained and set the dates.

10. Run the monthly maintenance extract

Who does this	Where it lives
Service manager / Admin	EM8 Core → Auto Schedule → 1. Run Extract

Do this

1. Open the tab. It lands on the right month by itself — this month if it has not been done, otherwise the next one.
2. Click Check month. Nothing is created yet; this is a preview.
3. Read the three figures: To create, Already raised, Skipped.
4. Click Print the sheet for the paper list — grouped by customer, with blank Planned and Done columns to write on.
5. Click Run Extract and confirm. Jobs are created for every contract due this month.
6. The jobs are unassigned and dated the 1st as a placeholder. Now plan them — by hand in the Diary, or with the Auto Schedule tab next door.



Things to know before you click it

- It is safe to run twice. Anything already raised this month is left alone, not duplicated.
- Maintenance jobs are created non-billable — the visit is already paid for under the contract. Parts used on the day are added as charges and bill normally.
- The skipped list is the important half. Those are live contracts producing no work. Contracts deliberately set to 0 visits are not on it.
- Running the extract does not invoice anything. That is a separate job — guide 11.

> **Only admins can run it.** Anyone can preview the month and print the sheet, which is what most people need.

11. Raise the monthly maintenance invoices

Who does this	Where it lives
Accounts / Admin	EM8 Core → Billing → Maintenance Invoices

Do this

1. Open the Maintenance Invoices tab. Billing has two: Jobs to Invoice and this one.
2. Check the month and click Check month.
3. Every contract due to be invoiced comes back ticked, with its value and the running total.
4. Untick the exceptions — a customer in dispute, a site that closed last week.
5. Click Raise invoices. Only the ticked rows are raised.
6. They are created as drafts. Review them, then send each one as normal.

How the value is worked out

- Annual value divided by invoice frequency. £6,000 a year billed quarterly is £1,500 a time.
- Billing follows the contract’s cycle, not whether the visit happened. A late visit does not hold up the invoice.
- Safe to run twice — contracts already billed for the month come back as already raised.

> **Why drafts:** An invoice run that sends unattended and gets it wrong reaches the customer before anyone here knows. Sending stays a deliberate act.

12. Build and send a quote

Who does this	Where it lives
Office	EM8 Core → Quotes → New Quote

Do this

1. Click New Quote and choose the Customer and Site. If it came from an enquiry, pick it under Raised from enquiry — that is what tells EM8 who to notify when it is accepted.
2. Give it a Job Title that describes the work in a line.
3. Set Valid Until, then choose the Quote type: Works, Maintenance, Monitoring or Mixed. A contract type opens the Contract terms card — visits per year (0 for monitoring), visit months, invoice frequency, annual value, start date and term. These are what the customer agrees to when they accept.
4. Add the lines. Pick from product searches Stock & Products and fills in the description, price and VAT — or type a line in freehand.
5. Check the Net, VAT and Total at the foot.
6. Save as Draft while you are still working on it.
7. When it goes to the customer, click Mark Sent.
8. When they come back, click Approve or Decline.

Emailing it to the customer

- Click Email to Customer on the quote, or the envelope icon on the list. The address is filled in from the customer record — add more, separated by commas, if it needs to go to several people.
- Set the subject and write your own covering message. The quote PDF is attached for you.
- Tick to copy yourself in if you want the thread in your own inbox.
- It goes out under your company name with replies coming back to you. The customer's reply lands in your inbox, not EM8's.

After approval: Turn the quote into a job and the lines carry across as charges. Nothing is retyped, and the price the customer agreed is the price that gets invoiced.

13. Raise a Quick Quote on site

Who does this	Where it lives
Engineer	Job → Quick Quote

Do this

1. From the open job, tap Quick Quote.
2. Add the parts needed and the labour hours. The net, VAT and total calculate as you go.
3. Add Notes explaining the work in plain English — the customer reads this.
4. Turn the screen round and show them.
5. Have them sign in the Customer signature box.
6. If they say no, tap Customer declined. It is still recorded.

> **Why record a decline:** When the same fault comes back in three months, the signed record of what you recommended and what they turned down is the whole conversation.

14. Raise an invoice and chase payment

Who does this	Where it lives
Accounts	EM8 Core → Billing → Jobs to Invoice

Do this

1. Open the Jobs to Invoice tab. Every completed job waiting to be billed is listed with its value, customer reference and PO reference.
2. Open a job and raise the invoice from there, or go to Invoices and click New Invoice.
3. Check the Invoice Date and Due Date.
4. Check the lines pulled through from the job's charges — description, quantity, unit price and net — and adjust if you need to. VAT and gross are worked out on the totals, from the VAT number on your Company Profile.
5. Add Notes if the customer needs an explanation on the face of the invoice.
6. Save and issue it. The job moves to Invoiced. Without Xero the button is Mark Sent; with Xero linked it reads Finalise, or Finalise & send to Xero — guides 22 and 23.

Chasing what you are owed

- Invoices → Show Overdue filters straight to the problems.
- Reports → Top Outstanding Balances gives you who owes the most and the oldest amount against each. Start there.

> **Watch the total:** The billing list totals what is on screen, so you can see at a glance how much finished work is still sitting uninvoiced.

The Jobs tab has a Waiting on engineer card — visits that have happened with nothing sent back. Click it to see just those, and chase from there.

Closing a job without charging

- Every completed job comes to this list. Beside Create Invoice is Close without charge.
- It asks for a reason — warranty revisit, goodwill, covered by a call-out contract — and closes the job with no invoice, with the reason on its record.

Jobs marked PRE-CHARGED

- A green PRE-CHARGED tag means the visit is already paid for under a maintenance contract, which is invoiced separately in Billing → Maintenance Invoices.
- Click Pre-charged — close. The job closes with no invoice and the covering contract is recorded as the reason.
- Only use Invoice anyway if extra chargeable work was done on the same visit. It asks you to confirm.
- Reactive jobs on contracted sites are never tagged pre-charged — parts and out-of-hours on a fault call are still chargeable.

15. Fix a bad time entry and export hours

Who does this	Where it lives
Office	EM8 Core → Hours

Do this

1. Choose the engineer and the period. You get every visit — arrival, departure, travel time, time on site, billable or not.
2. Look for the flagged entries. EM8 flags two problems: a visit auto-closed because it was left running, and a job where the clock was never stopped.
3. Click Fix on the flagged entry.
4. Enter the correct Arrived on site and Left site times.
5. Enter a Reason for the correction. This is logged.
6. Click Export Daily to download the spreadsheet for payroll.

> **If a button was never pressed at all:** Add the visit manually from the job’s time panel. Either route works — both keep the reason on the record, which is the point.

16. Add a product and raise a purchase order

Who does this	Where it lives
Office	EM8 Core → Stock & Products, then Purchasing

Do this

1. Stock & Products → Suppliers → New Supplier. Enter the name, your account number, contact details and anything worth knowing about lead times.
2. New Product. Enter the name and SKU, then the Cost Price, the Unit Price and the VAT Rate.
3. Choose the Supplier, enter your Opening Stock and a Reorder Level, and save.
4. Purchasing → New PO. Choose the supplier, set the Order Date and Expected Date.
5. Add a line for each item — description, quantity and cost. Totals calculate themselves.
6. Click Create PO. It saves as Draft. Move it to Ordered when you actually place it.
7. When the goods arrive, open the PO and click Record Goods Received, entering what actually turned up.

Why it is worth the setup: Products provide consistent pricing. Receiving a PO line updates stock only when that line is linked to a product; check the resulting stock before making a manual adjustment.

17. Issue and send a certificate

Who does this	Where it lives
Office	Job → Generate Certificate

Do this

1. Open the completed job and click Generate Certificate. The job has to be finished and written up first.
2. Check the standard on the dropdown. It comes from the discipline of the work — change it and the questions change with it.
3. Answer the questions: how much of the system was covered, any variations from the standard, faults found, and whether the system was left fully operational.
4. On an installation certificate you also give who designed it, who commissioned it, the date, and what documents the customer was handed.
5. Click Generate & preview, then read the PDF. It is the real document, not a preview of one.
6. Anything wrong — go back and change the answers. Nothing has gone anywhere yet.
7. Click Email to customer, check the address, and Send.

What happens next

- The PDF is filed in the site documents, so it is there for the next engineer and the next audit.
- It stays attached to the job it came from, with its certificate number.
- The send is logged with the address and date, so “we never got it” has a real answer.
- If you type an address that is not on file, it is saved to the customer for next time.

> **If it is wrong after it has gone:** Void it with a reason and issue a new one from the same job. Issued certificates are never edited — the voided one stays on the record, and that is what makes the trail worth having.

18. Run a custom report

Who does this	Where it lives
Office / Admin	EM8 Core → Reports → Custom Reports

Do this

1. Open Reports, then the Custom Reports tab.
2. Pick a question from the list on the left. It runs straight away.
3. Set any filter it offers — a discipline, or a number of days — and click Run.
4. Sort by clicking a column heading. Use Find in results to jump to a customer or site.
5. Click Export PDF. You get exactly what is on screen, with the same filters, on your letterhead.

The ones people use most

- Sites overdue their maintenance — what has slipped, and by how many days.
- Charges with no maintenance schedule — the customer is paying and nobody is going.
- Schedules with no charge — visits are being raised that nothing covers.
- Active contracts with no visit frequency — the ones Run Extract skips every month.
- Contracts expiring in the next 90 days — the renewals list.
- Completed jobs not yet billed — finished work still sitting there.

Nothing here changes anything. Every report is read-only. Run them, filter them, print them and take them to a meeting — you cannot break anything from this screen.

If a report shows sites you know are covered: It matches contracts to systems by discipline. Where either one has no discipline set they cannot be matched, so the site reads as a gap. The two data quality reports — systems with no discipline, contracts with no discipline — are how you clear it.

19. Get set up on the EM8 HQ app

Who does this	Where it lives
Engineer	App Store or Google Play → EM8 HQ

Do this

1. Install EM8 HQ from the App Store or Google Play.
2. Sign in with the same email and password as the portal.
3. Turn on Face ID or fingerprint when asked. The app locks itself when it goes into the background and unlocks with that.
4. Allow notifications (so you are told when work is assigned or moved) and location (so the clock records where you pressed Arrived).
5. Engineers open Engineer → Field Service Jobs in EM8 HQ. Use My Diary for booked visits. Authorised office users can access the EM8 Core product area; the product tile may be hidden for engineers.
6. Tap a job. The cards are Details, Time, Forms, Photos, Notes, Activity, Charges, Installed Kit and Quick Quote.

Things worth knowing

- A poor signal does not normally sign you out. Unlock with Face ID or fingerprint if prompted. A restored draft is not proof that a form or job has reached the server.
- Forms keep a draft on the phone for twelve hours, so a photo or a phone call does not lose your answers. Look for the amber Draft restored notice.
- If a screen says Failed, check the connection, note the error and retry. If it persists, ask the office to check access and report the error to support.
- The job with your clock running shows On site 43m in the list and sits at the top.

No jobs showing? Your engineer profile is not linked to your login — the office fixes it on Settings → App Users. If your access has just been changed, sign out and back in.

20. Log a job from the app

Who does this	Where it lives
Engineer	EM8 HQ app → Engineer → Log Out of Hours Call

Do this

1. Open the engineer’s Log Out of Hours Call action, or New job where offered in your job workspace.
2. Choose the Customer, then the Site.
3. Choose the Job type and set the Priority.
4. Describe the fault or the work in the customer’s own words.
5. Turn on Starting now if you are already on site. The job is assigned to you and the on-site clock starts as it saves.
6. Save. The job gets a number, appears in your list, and the office is notified. Its record says it was raised from the engineer app.

When to use it

- The customer collars you on site for something extra that is a job in its own right.
- A call comes in when the office is closed.
- Not for maintenance visits — those are raised for the whole month by Run Extract (guide 10).

> **Tip:** If the extra work needs pricing before you do it, raise a Quick Quote on the original job instead — guide 13. Log a new job when the work is happening regardless.

21. Book a job across several days

Who does this	Where it lives
Office	Job → Details tab → Visits card

Do this

1. Assign the engineer as normal (guide 2) and give the total hours. Anything over a working day is booked as one visit per day, weekends skipped unless they work them.
2. Open the job's Details tab. The Visits card lists every day it is booked for. Visit 1 is the assignment itself.
3. To add a day, click Add visit: engineer (defaults to the assigned one), date, start time, hours, and a note such as "Day 2 — second fix and commissioning". It defaults to the day after the last visit.
4. To remove a day, click Delete on that visit. To change day 1, use Assign Engineer.
5. Each visit is its own tile in the Diary and appears in the engineer's Today list on the right day. Drag a tile to move that day on its own.

Days an engineer does not work

Settings → App Users → Edit → Working days. Untick the days they are off. The Diary hatches those days out, Assign Engineer and the Visits card refuse them, and Auto Schedule plans around them. Personal entries — leave, training — are still allowed on any day.

Watch for: the card warns when a single visit is over ten hours. That is almost always a job that should have been two days, drawn as one block running past midnight.

22. Connect Xero

Who does this	Where it lives
Admin	EM8 Core → Settings → Xero

Do this

1. Go to Settings → Xero and click Connect to Xero.
2. Sign in to Xero, choose the organisation to link, and you are brought back. The page shows the organisation name, a Sync switch, two automation switches and the sync log.
3. Decide on Send to Xero automatically. On: every invoice you finalise goes to Xero straight away. Off (the default): invoices wait here until someone sends them — guide 23.
4. Decide on Email invoices from Xero automatically. On: once an invoice lands in Xero, Xero emails it to the customer with your Xero template, once only. Off (the default): nobody is emailed by Xero.
5. Raise invoices as normal. With Xero linked the button reads Finalise (or Finalise & send to Xero). The customer is matched to a Xero contact by name and the invoice number is the Xero reference.
6. When your bookkeeper applies a payment in Xero, the invoice here moves to Paid with the date, amount and reference — usually within moments, within fifteen minutes at most.
7. To pause, turn the Sync switch off — anything finalised in the meantime waits and goes when it is back on. To end the link, click Disconnect; anything already in Xero stays there.

If something is missing

- An invoice has not appeared in Xero — with auto-send off it is waiting for Send to Xero… (guide 23). A draft never goes at all.
- The customer did not get an email — the Email from Xero switch is off, or the contact in Xero has no email address. Check the sync log.
- The page says Xero needs reconnecting — the link expired or was revoked at the Xero end. Click Reconnect. Nothing is lost; the queue sends what it could not once the link is back.
- A payment has not come back — give it fifteen minutes, then check it was applied to the right invoice in Xero.

> **Both switches start off.** Nothing leaves EM8 Core and nobody gets an email from Xero until you say so. Most firms turn on auto-send once they trust it, and leave Xero emailing off if they send invoices from EM8 Core.

23. Send invoices to Xero

Who does this	Where it lives
Accounts	EM8 Core → Billing → Invoices

Do this

1. Open the Invoices tab. The Xero column shows where each invoice stands: In Xero, Not sent or Error.
2. Click Send to Xero… — every finalised invoice not yet in Xero is listed and ticked.
3. Untick anything you want to hold back.
4. Click Send. Invoices go one at a time, so one bad invoice does not stop the rest.
5. Check the Xero column afterwards. Anything showing Error has been queued for another try; open it to see why from the sync log.

Worth knowing

- With Send to Xero automatically switched on (guide 22) you will rarely need this — invoices go as they are finalised. The picker is still there for anything that was held back or failed.
- A payment recorded here against an invoice that has not gone to Xero yet waits, and goes across with the invoice.
- If Email invoices from Xero automatically is on, Xero emails the customer once the invoice arrives — once only, never again on a resync.

> **Finalise first.** Only finalised invoices appear in the picker. A draft is still yours to change, so Xero never sees it.

24. Move a site to another customer

Who does this	Where it lives
Admin	EM8 Core → Sites → open the site

Do this

1. Open the site that is under the wrong customer.
2. Click Move to customer in the header, next to Edit. It is admin-only.
3. Search for the customer it should belong to and select it.
4. Read the warning and click Move site. The confirmation lists what moved with it.
5. Repeat for any other sites on the wrong record, then delete the now-empty customer.

Worth knowing

- Everything on the site goes with it — jobs, service contracts, quotes, invoices, notes, form submissions, certificates, enquiries and site contacts. Nothing is left pointing at the old customer.
- Contacts and notes held at customer level, not on the site, stay behind. Copy anything worth keeping before you delete the empty record.
- The move is in the Audit Log against the site and both customers.

This is how you merge duplicates. Imported data often has one customer set up four times with a site each. Move the sites onto one record and delete the other three.

25. Log an enquiry and quote it

Who does this	Where it lives
Office	EM8 Core → Sales → Enquiries

Do this

1. Click New Enquiry. Record the Customer (or the name if they are not a customer yet), a Description of what they want, the Source, an Estimated Value and a Status.
2. Assign it to the salesperson handling it. They are the one told when a quote for it is accepted.
3. Drop the customer's drawings, spec and site photos onto the Files panel. Click any file to preview it.
4. Raise the quote from Quotes → New Quote and pick this enquiry under Raised from enquiry. Choose the Quote type — a maintenance or monitoring quote also takes its contract terms — and pick lines from Stock & Products.
5. Email the quote (guide 12). Every quote raised against the enquiry shows on it, so a revision or a cut-down option sits alongside the first price.
6. Keep the Status moving as it progresses so the pipeline reads true.

Worth knowing

- An enquiry with nobody assigned still gets acted on — with no salesperson, everyone in the office is notified instead of nobody.
- Files preview in place, the same as the site cabinet — no need to download to see what was sent.

> **Quote type matters.** Works is a one-off. Maintenance and Monitoring carry the visit and billing terms the customer is agreeing to, and those terms become the draft contract when the quote is accepted — the office approves it before anything goes live.

26. Book a site survey and fill it in on the app

Who does this	Where it lives
Office / Sales, then the surveyor	Sales → Enquiries → open one → Survey

Do this

1. Open the enquiry and go to the Survey tab.
2. Turn on Survey required, pick the Surveyor and set Booked for.
3. Add Survey notes — what to look at, who to ask for, anything they need before they go.
4. Click Save Survey. A Site Survey job is raised for that person, dated for the day you booked, with the survey form on it.
5. The surveyor opens the job in the app and works through the form on the Forms card, saving a draft as often as they like.
6. Submitting the form completes the survey job and moves the enquiry to Surveyed. Read the answers from the enquiry with View survey form.
7. Quote from the enquiry as normal — guide 25.

Worth knowing

- Changing the date or the surveyor and saving again re-books the same job rather than raising another.
- The surveyor needs an active engineer profile linked to their login, the same as an engineer. Sales staff who survey count as an app user.
- The enquiry does not have to be a customer yet — saving the survey creates the prospect customer and a site from the enquiry address, because a visit has to have somewhere to go.
- Survey jobs are raised non-billable, so they never turn up on the billing list looking like a visit somebody should invoice.

Nothing appeared on the phone?: Check the surveyor has an engineer profile linked to their login, and that the Fire Survey & Design Report is active on Settings → Forms. The Survey tab tells you if the job could not be raised.

27. Email a job sheet to the customer

Who does this	Where it lives
Office	Job → Email job sheet

Do this

1. Open the completed job.
2. Click Email job sheet in the header. It is there from Complete onwards.
3. Confirm. It goes to the site's email address where one is set, otherwise the customer email, then the invoice email.
4. Read the message that comes back — it names the address it went to, or gives the reason it did not go, which is almost always no email address on the record.
5. Check the Job sheet emails card on the job's Details tab. Every send is listed with the time, the address and the reason for any failure.

The automatic send

- Tick Auto-send completed job sheet on the customer record and their job sheets go out on their own the moment a job is sent to billing.
- It goes once per job. Sending to billing and then invoicing does not send it twice.
- A send that failed does not count as sent, so a bounced first attempt is tried again on the next step.
- This button ignores the tickbox. The tickbox governs the automatic send, not whether you may ever email a sheet.

> **Proving it went:** The log records failures as well as successes. "We emailed it" is worth nothing in a dispute; "it went to accounts@… at 14:32 on the 3rd and was accepted" is an answer.

28. Turn on late-job alerts

Who does this	Where it lives
Admin	EM8 Core → Settings → Alerts

The job was booked for nine, it is ten past, and nobody has tapped Arrived on site. This tells you where the van actually is instead of you ringing round to find out. It needs Tracking Guardian.

Do this

1. Go to Settings → Alerts.
2. Click Test now FIRST. It runs the whole thing against today's live diary and shows exactly what would have been sent — without sending anything to anybody.
3. Read what comes back. Rows saying No vehicle assigned or Site not geocoded are data to fix, not alerts to send.
4. Set the Grace period — fifteen minutes to start with — and leave Counts as on site within at 750 m.
5. Choose who gets told: the engineer, the office, or both.
6. Turn Alerting on and save.

What it sends

- Van at the site, nothing tapped — the engineer only, and what he gets is "tap Arrived". He is not late, the timestamp is missing, and telling the office otherwise earns him a phone call he did not deserve.
- Van somewhere else — the engineer and the office, with the distance, and which job he is still clocked on to if he is on one.
- Cannot tell — nothing, unless you tick the option. That covers no vehicle assigned, no tracker on the van, a fix too old to trust, and a site with no coordinates.
- Each verdict fires once per job per day, and every alert is written to the job's activity log as well.

> **It relies on the fleet record:** The van it checks is the one assigned to that engineer in Tracking Guardian. If two engineers swap vans and nobody records the swap, the alerts follow the old assignment — so record the swap.

29. Add fire-safety equipment to a Core site

Who does this	Where it lives
Office / Admin	EM8 Core → Customers → Sites → site → Equipment & cover (FireLog customers)

Do this

1. Open the customer's site and choose **Equipment & cover**.
2. In **Fire-safety equipment**, click **Add equipment**. You do not need to create a FireLog site first.
3. Choose the equipment type, enter its name and location, and complete the device fields. Alarm equipment uses the alarm references; other types show their own specifications.
4. Save. Core prepares or reuses the site logbook and the device appears in the live equipment register.
5. Reopen the device and check its details. Existing inspections and the same equipment identity are kept.
6. If **Site records need administrator review** appears, ask an administrator to confirm the right site before trying again. Do not create a second logbook to get round the warning.

Remember

Systems hold contract cover and maintenance dates. Individual devices hold inspection records. Adding a device does not, by itself, schedule a maintenance visit.

> **FireLog:** These fire-safety equipment screens are part of FireLog, which is now a separate paid product. Without it, the Fire-safety equipment card is hidden and fire devices are kept with the site's other assets (guide 55).

30. Use an NFC tag on a device

Who does this	Where it lives
Engineer	EM8 HQ app (writing tags) · EM8 Core forms (scanning)

Do this

1. Make sure the device is on the site's asset list (Equipment & cover), or on its FireLog register if you have FireLog.
2. In EM8 HQ, open the device and use its NFC write action on a supported phone. The browser cannot write tags.
3. Scan the tag again and check it opens the right device and site before fixing it in place.
4. On a job form with a device list, scan the tag to fill in that device's row (guide 55).
5. For offline FireLog work, download the site and its equipment while you still have signal. Only downloaded equipment can be matched offline.

Remember

NFC tags now work for any device on the site's asset list, not just fire-safety equipment. A green **NFC** tag on Equipment & cover shows which devices already have one.

> **Tip:** If a device is missing, check the site and refresh rather than adding it a second time.

31. Link an inspection to a Core job

Who does this	Where it lives
Engineer / Office	EM8 Core → Jobs → job → Site fire logbook (FireLog customers)

Do this

1. Complete the site inspection in FireLog, on the app or the portal.
2. If you worked offline, reconnect and check the inspection has synchronised before looking for it in Core.
3. Open the Core job for the same site and its **Site fire logbook** tab.
4. Under **Inspection evidence for this job**, find the right visit and click **Link inspection**.
5. Check the row now says **Linked**. The results, defects and documents stay in the logbook.
6. Complete and review the Core job as normal. Linking evidence does not complete the job for you.

Remember

Routine checks do not move the contracted service date on. Keep the inspection and the job's completion and billing as separate steps.

> **FireLog:** These fire-safety equipment screens are part of FireLog, which is now a separate paid product. Without it, the Fire-safety equipment card is hidden and fire devices are kept with the site's other assets (guide 55).

32. Turn a FireLog defect into verified corrective work

Who does this	Where it lives
Office / Engineer	Site → Equipment & cover → Fire-safety equipment → Defects & corrective jobs

Do this

1. Open the site's **Fire-safety equipment** panel and choose **Defects & corrective jobs**.
2. Find the defect, check its severity and click **Create corrective job**. If a linked job already exists, open that instead.
3. Assign the job, carry out the repair and complete the job with the required evidence.
4. Return to the defect and click **Submit repair evidence**. Describe the repair and how it was checked.
5. Submit. The defect moves to **Awaiting verification**.
6. An authorised verifier reviews the evidence, then verifies and closes the defect in the logbook.

Remember

Completing or invoicing a corrective job does not close the defect. Awaiting verification is not Closed.

This is FireLog's defect list. EM8 Core now has its own defect register for every customer (guides 38 and 39).

> **FireLog:** These fire-safety equipment screens are part of FireLog, which is now a separate paid product. Without it, the Fire-safety equipment card is hidden and fire devices are kept with the site's other assets (guide 55).

33. Enable customer online access

Who does this	Where it lives
Admin	EM8 Core → Customers → customer → Online access / Users

Do this

1. Open the customer and choose **Online access / Users**.
2. Click **Enable online access** and enter the person's name and email address.
3. Choose **Areas to share**. Jobs, assets, Fire logbook and certificates are ticked by default; add invoices, quotes and **Compliance** where appropriate.
4. Keep **All this customer's sites** ticked (future sites included), or untick it and choose the sites.
5. Save. Copy the activation link and send it to that person securely. It works once and expires after 48 hours; no email is sent automatically.
6. The customer sets a password and signs in at the Customer sign-in address shown on the page.
7. Use the user list to check activation, sites and last sign-in. **Edit access**, **Reset password** or **Revoke access** as needed.

Remember

Access is read-only and limited to that customer and what you ticked. Draft financial documents and internal notes are never shared. Changing access signs out existing sessions.

Compliance shows the customer each site's score, its open defects and false alarms from the last 12 months, with no prices, notes or staff names.

34. Prepare and synchronise a FireLog offline visit

Who does this	Where it lives
Engineer	EM8 HQ → FireLog365 → site → Contractor Visits & Records

Do this

1. While connected, open the site and download its equipment and current inspection forms for offline work.
2. Open or create the contractor visit. Check the site and the equipment you need are available before you lose signal.
3. Record results, notes and the required form answers. Scan downloaded equipment tags where useful and capture the evidence.
4. Complete the required answers and queue the visit for synchronisation.
5. Reconnect and open the app. Check its sync status and retry any failed visit. On iPhone, use **Sync Completed Visits** if needed and keep the app open while it uploads.
6. Check the completed visit and its evidence appear in the portal. If a form has changed version, review the latest form and kept answers before retrying.

Remember

Offline FireLog inspections do not mean all Core work is offline. Creating equipment and downloading documents need a connection. Do not delete the app or its data while evidence is waiting to sync.

> **FireLog:** These fire-safety equipment screens are part of FireLog, which is now a separate paid product. Without it, the Fire-safety equipment card is hidden and fire devices are kept with the site's other assets (guide 55).

35. While you're here — on-site prompts

Who does this	Where it lives
Engineer & Office	Automatic, on arrival

When you tap Arrived on site, EM8 Core checks the site for other work worth doing while the van is there.

Do this

1. Tap **Arrived on site** as normal when you reach a job.
2. If the site has any other open job, or a maintained system whose service is overdue or due within 30 days with no job booked, a prompt lists them.
3. Do what you can while you are there, or ask the office to book it in.
4. The office gets the same prompt, so nothing depends on the engineer acting on it.

Who sees it

Both the engineer and the office, so if the engineer is busy the office can still turn it into a booked visit.

36. Passing an open job — Tracking Guardian alerts

Who does this	Where it lives
Office	Automatic (with Tracking Guardian)

If you also have Tracking Guardian, the office is told when an engineer is about to drive past an open job nobody has been sent to.

Do this

1. Nothing to do day to day: the alert arrives on its own once it is switched on.
2. It looks at the route between the engineer's last completed job and their next scheduled job, and flags any open job within a few miles of that route.
3. The alert names the job, the site, the distance in miles and the van, e.g. “YP21XCW is en route to Monmouthshire Golf Club and will pass about 1.9 mi from Hilltop Stores”.
4. Decide whether to divert the engineer, and reassign the job in the Diary if you do.

Switching it on

Off until it is switched on for your company. Ask EM8 to turn it on and set the distance.

37. Find service dates that do not add up

Who does this	Where it lives
Office	EM8 Core → Reports → Custom Reports

Catches any maintained system whose next service date does not match its last service plus the interval: a wrong or missed date.

Do this

1. Go to **Reports → Custom Reports**.
2. Choose **Service dates that do not add up**.
3. Set the tolerance in days (30 is the default) and a discipline if you want to narrow it.
4. Review the list: each row shows the last service, the recorded next service, the expected next service and how far out it is.
5. Correct the dates on the system, or raise the missed visit.

Why it matters

A next date pushed years out hides a missed service from the overdue list. This is how you find those.

38. Raise a defect and quote the repair

Who does this	Where it lives
Office	EM8 Core → Customers → Defects (also Site → Compliance)

Do this

1. Go to **Customers** → **Defects** (the Defect register) and click **Raise defect**.
2. Choose the **Customer** and **Site**, describe the **Defect** (e.g. “Sounder not operating in zone 3”) and set the **Severity**: Critical, Major, Minor or Advisory.
3. Add the **Location**, the **System** if you know it, **Details** and the **Recommended action**.
4. Enter an **Estimated price (£)**. It becomes the price when the defect is quoted. Save.
5. To quote, tick the defects for one site and click **Quote selected**. A draft quote is made; review and send it from **Sales** → **Quotes**.
6. To fix it without a quote, tick the defects and click **Remedial job**, then **Create job**.

Following it through

The **Stage** column moves on by itself: Open, Quoted, Quote accepted (or declined), Remedial booked, then **Work done — sign off** (guide 39).

> **Tip:** A defect with no estimated price goes onto the quote unpriced, and you will be warned. Price it before you send the quote.

39. Sign off a defect

Who does this	Where it lives
Engineer / Office	Job → Defects · Customers → Defects · Site → Compliance

Do this

1. Open the defect from the job's **Defects** tab, the Defect register or the site's **Compliance** tab.
2. Click the row's ⋯ menu and choose **Sign off as resolved**.
3. Fill in **How was it resolved?**. It is required.
4. Save. The defect moves to **Resolved**, and your name is recorded against it.

Who can do what

Engineers, office staff and admins can raise, edit and sign off defects. Only the office and admins can **Void (raised in error)**, **Reopen** or raise a remedial job.

> **Remember:** An open defect lowers the site's compliance score until it is signed off (guide 41).

40. Record a false alarm

Who does this	Where it lives
Office / Engineer	EM8 Core → Customers → Sites → site → Compliance

Do this

1. Open the site and choose the **Compliance** tab.
2. In **False alarms**, click **Record false alarm**.
3. Fill in **When** and the **Cause**: Unwanted (cooking, steam, dust), Equipment fault, Malicious, Good intent or Cause not known.
4. Add the **Device** and **Zone**, **What happened** and the **Action taken**.
5. Tick **Fire and rescue service attended** if they came. Save.

Why record them

False alarms from the last 12 months count against the site's compliance score, and customers with Compliance access can see them.

41. Check a site's compliance score

Who does this	Where it lives
Office	EM8 Core → Customers → Compliance · Site → Compliance

Do this

1. Go to **Customers** → **Compliance**. Every site is listed worst first, with its **Score** and **Why**.
2. Filter by band (Good, Needs attention, At risk) or by customer.
3. Open a site's **Compliance** tab to see the **Compliance score** card and each deduction.
4. Fix what is dragging it down: book the overdue service, sign off open defects, look into repeated false alarms.

How it is worked out

Every site starts at 100 and loses points for overdue, due-soon or never-serviced systems, open defects (critical 20, major 10, minor 3) and false alarms. 85 or more is Good, 60 or more Needs attention, below that At risk.

A site can never be Good while it has a critical defect or an overdue system.

42. Log and close a complaint

Who does this	Where it lives
Office / Admin	EM8 Core → Quality → Complaints

Do this

1. Go to **Quality** → **Complaints** and click **Log complaint**.
2. Enter a **Summary**, when and **How** it was received, the **Severity** (Low, Medium or High) and the customer, site and complainant.
3. Leave **Response due** blank to use 5, 10 or 20 working days by severity. Save: it gets a CMP-0001 style reference.
4. Open it and click **Mark acknowledged**. Set an **Owner** and move it to **Investigating**.
5. Record the **Root cause**, the **Corrective action** and the **Preventive action**. Use **Add a note** to keep the history.
6. Resolve it (you will be asked how), record what you told the customer and whether they were satisfied, then close it.

Remember

A complaint cannot be closed without a corrective action. The office is alerted the morning after a complaint misses its response date.

> **Who sees it:** The Quality tab is for office staff and admins by default. Its Audit KPIs page shows complaints, test equipment, defects and on-time jobs for an auditor.

43. Add test equipment and record a calibration

Who does this	Where it lives
Office	EM8 Core → Quality → Test equipment

Do this

1. Go to **Quality → Test equipment** and click **Add instrument**.
2. Enter the **Name**, **Type**, make, model, **Serial number** and **Asset tag**, and the **Assigned engineer**.
3. Set **Calibrate every (months)**, **Last calibrated** and **Calibration due**. Save.
4. When it comes back from calibration, click **Record calibration** and enter the date, **Next due**, the result and the certificate number.
5. Use **History** to see every calibration on record.

Remember

A **Fail (quarantine it)** result takes the instrument out of use. Reminders go weekly from 30 days before the due date to the office and the assigned engineer. **What reminders go today?** shows who will be told.

44. Set up safety questions before work starts

Who does this	Where it lives
Admin	EM8 Core → Settings → Safety questions

Do this

1. Go to **Settings** → **Safety questions**.
2. Click **Add starting questions** to load seven standard questions (PPE, RAMS read, site induction, isolations and permits, fit to work, unexpected hazards, lone working). Add your own with **Add**.
3. For each question set the **Safe answer** (Yes or No) and what an unsafe answer does: **stop work** or **alert office**.
4. Choose **How often**: every job visit (other jobs at the same site count), or once per engineer per day.
5. Set **When to ask** to **Ask and record**. Engineers answer when they tap **Arrived on site**.

Records

Answers show on the job's **Time** tab. **Quality** → **Safety checks** lists them with unsafe answers first. An unsafe answer alerts the office straight away.

> **Important:** The EM8 HQ apps cannot answer safety questions yet. Do not choose **Required before starting** until they can: engineers on the current apps would not be able to clock on at all.

45. Issue a commissioning, acceptance or design certificate

Who does this	Where it lives
Office	EM8 Core → Jobs → job → Certificate

Do this

1. Open the completed job and click **Certificate** in its header.
2. Under **Certificate type and standard**, choose the wording for the certificate you need: design, commissioning, acceptance, verification, maintenance or installation.
3. Answer the questions for that type, e.g. the commissioning tests and results, or items outstanding at acceptance.
4. Under **Client sign-off**, choose **Client signs now** (client name, position and signature), use the job's customer signature, or choose no client sign-off.
5. Click **Generate & preview**, check it, then **Download** or **Email to customer**.

Remember

An acceptance certificate must be signed by the client. Your certification scheme, registration number and badge print on every certificate once they are set in **Settings → Company Profile → Accreditation on certificates**.

46. Issue a completed form as a certificate

Who does this	Where it lives
Office	EM8 Core → Jobs → job → Forms

Do this

1. Open the job's **Forms** tab and find a completed form.
2. Click its **Certificate** button.
3. Answer **Was the system left fully operational?**, add any outstanding faults and recommendations, and the signatory's position.
4. Add the client's sign-off if needed, then click **Issue certificate**.

Remember

The form is frozen into the certificate. Editing the form afterwards does not change a certificate that has already been issued.

47. Add a follow-up to a job

Who does this	Where it lives
Office / Engineer	Job → Details → Follow-ups (engineers: when completing in the app)

Do this

1. Engineers choose a follow-up when they finish the job in the app. In the office, open the job's **Details** tab and find **Follow-ups**.
2. Click **Add follow-up** and choose the **Outcome**.
3. Add **Details**. They go to the office, the job history and the new job or quote.
4. Click **Raise**. The card shows the job or quote it created.

What each outcome raises

Critical fail and **Quote required**: a draft quote. **Return required** and **Parts required**: a new job for the same engineer. **No access**: a new unassigned job to revisit.

Each outcome can be used once per job. If one shows **Not raised — do it by hand**, raise that job or quote yourself.

48. Turn on automatic quote chasing

Who does this	Where it lives
Admin	EM8 Core → Settings → Alerts → Automatic quote chasing

Do this

1. Go to **Settings** → **Alerts** and switch on **Automatic quote chasing**.
2. Under **Send reminders after**, choose up to six days. 3, 7 and 14 days are set to start with, counted from when the quote was first emailed.
3. Add an **Opening line** if you want one. Click **Save schedule**.
4. Click **What would be sent now?** to check before anything goes.

What the customer gets

A reminder with the quote attached and a fresh **Review & Accept** link. Chasing stops once the quote is signed, accepted, declined or expires.

Each quote has an **Automatic chasing** card showing the next reminder, with **Pause** and **Resume** for that quote.

49. Turn on service-due emails to customers

Who does this	Where it lives
Admin	EM8 Core → Settings → Service Reminders

Do this

1. Go to **Settings** → **Service Reminders**.
2. Set how many days before the service is due to email (30 to start with) and click **Save**.
3. Click **Preview who would be emailed today**. It sends nothing.
4. When you are happy, switch it **On**. **Sent recently** shows what went out.

Who is emailed

Maintained systems on an active contract. One email per site lists every system due there. It goes to the site's email (or the customer's), in your company's name. Systems already booked with an engineer, and overdue systems, are skipped.

50. Turn on customer feedback after each job

Who does this	Where it lives
Admin	EM8 Core → Settings → Customer feedback

Do this

1. Go to **Settings** → **Customer feedback**.
2. Choose **Send after** (2 hours to start with) and, if you like, don't ask the same customer again within a number of days.
3. Add your **Google review link** and the rating that asks for a review.
4. Choose **Alert the office when the rating is** (2 or lower to start with).
5. Click **Who would be asked now?** to check, then switch it on and **Save**.

What happens

The customer gets “How did we do?” with five one-tap ratings, no login, and can add a comment. A low rating alerts the office by notification and email. Each job is asked about once.

The job header shows the rating. **Reports** → **Feedback** gives the average and response rate by engineer, site and customer.

51. Set labour rates and customer prices

Who does this	Where it lives
Admin / Office	Settings → Labour Rates · Customer → Rates

Do this

1. An admin goes to **Settings → Labour Rates** and clicks **Add rate**: a **Name** (Standard, Out of hours, Call-out) and a price **Per hour (£, ex VAT)**.
2. Mark your usual rate with **Make standard**.
3. For a customer with their own prices, open the customer's **Rates** tab, fill in **This customer pays** and click **Save customer rates**. Leave a price blank for the standard rate.
4. When you add a Labour charge to a job, choose the **Labour rate**: the price per hour fills in and the quantity is the hours.

Remember

Rates only fill in new lines on jobs, invoices (**Labour**) and quotes (**Add labour…**). Nothing already charged is repriced.

52. See what a job or contract made

Who does this	Where it lives
Office / Admin	EM8 Core → Reports → Profitability · Job → Profit card

Do this

1. An admin first sets **Settings** → **Labour costs**: a company cost per hour and, where it differs, each engineer's.
2. Go to **Reports** → **Profitability**, pick the period and the **Jobs** or **Contracts** tab.
3. Read **Revenue (net)**, **Cost** and **Margin**. Click a row for the breakdown, or **CSV** to export.
4. On a single job, the **Profit** card under the job's summary shows the same figures.

“Cost incomplete”

Something is missing, so the real margin is lower than shown: labour with no cost rate, time still running or auto-closed, no time recorded, or parts with no cost price. Unknown amounts show “—”, never £0.

> **Who sees it:** Office staff and admins only. Engineers never see profit figures.

53. Raise a purchase order for a job

Who does this	Where it lives
Office	Job → Details → Purchase orders

Do this

1. Open the job's **Details** tab and find **Purchase orders**.
2. Click **Raise PO for this job**. The supplier can be chosen later; the PO is saved as a draft with “For job J-…” in its notes.
3. Click **Create PO**, then finish it in **Stock & Purchasing → Purchase Orders**: choose the supplier and the **Product** on each line.
4. Mark it ordered. It now counts as a cost of the job.

Stock orders for several jobs

On a PO, each line can name its own job, or **No job (stock)**. Use **Change jobs…** to fix the links at any time.

Pick the product on each PO line. That is how the profit report knows not to count a charged part twice.

54. Take a deposit when a quote is accepted

Who does this	Where it lives
Office	EM8 Core → Sales → Quotes → Convert to Job

Do this

1. Open the accepted quote and click **Convert to Job**.
2. Tick **Raise a deposit / pre-work invoice?** and set **Deposit (% of the quote)**. 50% is set to start with.
3. Convert. The job is created and the deposit is saved as a draft invoice.
4. Check and send the deposit invoice from **Billing** → **Invoices**.

Remember

The job's **Charges** tab lists its deposits, and the final invoice takes them off automatically.

55. Use device lists on forms

Who does this	Where it lives
Admin / Engineer	Settings → Forms · Job → Forms

Do this

1. In **Settings → Forms**, open a form with a table of devices and tick **These rows are site assets**. The table needs a column for the device type or name.
2. On the job, the engineer opens the form and clicks **Select asset** to pick devices already on the site, or scans a device's NFC tag.
3. For a device that isn't listed, click **Add new** and type it in.
4. When the form is completed, new rows are saved to the site's assets automatically.

Remember

A job form with a type column and a location column is linked automatically; untick the box to stop that. Columns called Location, Zone, Loop, Address, Make, Model and Serial are filled in too.

If you also have FireLog, fire devices from a form go into the site's fire logbook instead.

56. Quote from a Plan Guardian plan

Who does this	Where it lives
Office	Plan Guardian → plan → EM8 Core view

Do this

1. Open the plan and switch to the **EM8 Core** view. Under **EM8 Core site**, choose the site if it isn't found automatically.
2. Link each device to the site's assets with **Link an existing asset** or **Create asset**, or **Create assets for selected**.
3. Click **Create quote**, and choose a product for each device type.
4. Add **Valid until** and **Notes for the customer** if needed, then **Create draft quote**.
5. Review and send it from **Sales** → **Quotes**.

Remember

Quantities come from the saved drawing. A device type with no product becomes an **Unpriced** line, never £0, and the quote cannot be sent until it is priced. Your product choices are remembered for next time.

On a job at that site, the **Plans** tab colours each device by this visit's result: failed, passed, seen, or not yet tested.

57. Fill in a cause and effect chart

Who does this	Where it lives
Office	Plan Guardian → plan → Zone chart & C&E

Do this

1. Open the plan and switch to **Zone chart & C&E**.
2. In **Cause and effect**, click a cell to cycle it: blank, **X** (operates immediately), **D** (operates after a delay).
3. Add rows or columns with **Other input** and **Output column**.
4. Click **Save matrix**. Use **Zone chart PDF** for the zone chart on its own.

Remember

Only the current revision can be edited. Both the zone chart and the cause and effect chart print with the plan PDF.

Need help?

Your EM8 Core support contact is your first port of call for anything these guides do not cover — including feature requests. The system is actively developed and customer suggestions genuinely do get built.

For the full detail behind any of these guides, see the EM8 Core User Guide & Training Manual (version 1.9) — certificates are Sections 4.7 and 22, custom reports Section 12.3, surveys Section 11.2, late-job alerts Section 2.8, the EM8 HQ app Section 13, and the November features (defects, quality, safety questions, follow-ups, rates and profitability, purchase orders, device lists and Plan Guardian) Sections 19 to 27.

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