

EM8 CORE

Field Service Management

User Guide & Training Manual

Everything your office team and engineers need to run jobs, sites, contracts, quotes and invoices in one place.

Version 1.6

Engineer M8 · em8portal.com

What has changed since version 1.5

If you have read version 1.5, these are the parts worth re-reading. Everything below is already live.

What changed	Where to read it
Automatic job sheets now go out when you SEND A JOB TO BILLING, not when it is invoiced. That is the point at which the office has read the write-up and is standing behind it. It goes once per job.	Sections 3.1, 4.5 and 8.2
A job now has an Email job sheet button, and a Job sheet emails log on its Details tab showing every send, the address it went to and the reason for any that failed.	Section 4.6
New: Alerts. Where you also have Tracking Guardian, EM8 Core can tell you when an engineer is not at the job the diary booked him on to. Off until you turn it on, and there is a test that sends nothing.	Section 2.8
Surveys are booked from the enquiry and filled in on the app. Booking one raises a survey job on the surveyor's phone with the form on it; submitting the form completes the job and moves the enquiry on.	Section 11.2

EM8 Core at a glance

EM8 Core is the field service management module inside the EM8 Portal. It replaces job cards, spreadsheets and paper worksheets with a single system that follows a job from the first phone call all the way through to the invoice.

Everything lives under one menu item — EM8 Core — and is split into the tabs below.

Every feature, in one table

Tab	What it does
Dashboard	Your daily overview — open jobs, jobs this month, recent activity and engineer seat usage.
Customers	Your end-clients. Contact details, credit terms, VAT settings, job sheet delivery, and every site they own.
Sites	Now a sub-tab of Customers. Individual premises — Equipment & cover, site contacts, documents, alerts and service history.
Jobs	The heart of the system. Log faults and planned work, assign engineers, record time on site, add parts and charges, complete and sign off.
Hours	Now inside Reports. Engineer time on site and travel time, with a daily timesheet export for payroll.
Billing	Two worklists — completed jobs waiting to be invoiced, and the month's maintenance contract invoices.
Diary	A calendar of scheduled work per engineer. Drag jobs into slots and see the week at a glance.
Auto Schedule	The monthly maintenance run. Tab 1 creates the month's contracted jobs; tab 2 routes them to engineers and into the diary.
Enquiries	Sales enquiries and leads before they become jobs or quotes — source, value and status.
Surveys	On-site surveys (for example a Fire Design Survey) completed on a tablet and signed by the customer.
Quotes	Build quotes line by line, send them, and track approved / declined / expired. Includes Quick Quote for on-site upsells.
Invoices	Raise invoices from completed jobs, track what is outstanding and what is overdue.
Stock & Products	Your parts catalogue and stock levels, plus your supplier list and pricing.
Purchasing	Purchase orders to suppliers, with goods-received recording that feeds stock levels.
Messages	Internal messages between office and engineers, optionally linked to a specific job.
Calls	Call log with screen-pop for incoming calls, so you can see who is ringing and link the call to a customer.
Reports	Jobs by engineer, jobs by type, revenue and top outstanding balances. (Admin only.)
Audit Log	A record of who changed what and when. (Admin only.)
Settings	Company details, branches, job/call types, SLA response times, engineers, form templates and the Xero connection. (Admin only.)
Custom Reports	A catalogue of named questions — overdue maintenance, charges without a schedule, contracts expiring, data gaps. Read on screen, export as a PDF. (Admin and office.)

What EM8 Core also gives you

- Custom forms and certificates — build your own checklists and service certificates, attach them to job types, and have engineers fill them in on site with photos and a customer signature.
- SLA response times — set target response and fix times per customer or call type, and see jobs flagged as at risk before you breach them.
- Maintenance contracts that schedule themselves — record the visit pattern once, then create a month of planned work in a click and invoice it on its own cycle.
- Site asset registers — record what equipment is installed where, so an engineer arrives knowing what they are working on.
- Time on site — engineers press "On my way", "Arrived on site" and "Complete", giving you accurate travel and on-site hours without timesheets.
- Notifications — engineers are told on their phone when work is assigned or moved; the office is told when jobs complete and when an SLA is at risk.
- Job sheets and PDFs — print or email a professional job sheet, quote or invoice straight from the record, or have it sent to the customer automatically.
- Role-based access — engineers see their own work, office staff see the day-to-day, administrators see reports, settings and the audit log.
- Reports that answer a question — a catalogue of ready-made reports covering overdue maintenance, contracts billed with no visit behind them, and the data gaps that cause both. Every one exports as a PDF on your letterhead.
- Certificates from the job — maintenance and installation certificates generated from the completed visit, previewed before they go, emailed to the customer and filed against the site.

How to use this guide: Sections 1 to 3 are the setup you do once. Section 4 onwards is the day-to-day. If you only read one section, read Section 4 — The job lifecycle. If you run maintenance contracts, read Section 6 as well.

Contents

Section	Covers
1. Getting started	Signing in, who sees what, finding your way around
2. First-time setup	Company profile, branches, call types, SLA, engineers, forms, Xero, alerts
3. Customers and sites	Adding customers, adding sites, assets, contracts, documents
4. The job lifecycle	Logging, assigning, on-site working, completing, approving, certificates
5. The Diary	Scheduling and moving work
6. Maintenance contracts and the monthly run	Contract setup, Run Extract, Auto Schedule
7. Quotes	Full quotes and on-site Quick Quotes
8. Billing and invoices	The billing worklists, maintenance invoicing, chasing payment
9. Stock and purchasing	Suppliers, products, purchase orders, goods received
10. Hours and timesheets	Time on site, corrections, payroll export
11. Enquiries, surveys, messages and calls	The supporting tabs
12. Reports and the Audit Log	Reports, custom reports and the audit log
13. The EM8 HQ app	Installing it, the Today screen, working a job, forms, photos and completing on the phone
14. Quick reference	Job walkthrough, the monthly routine, priorities, glossary
15. Common questions	Troubleshooting

1. Getting started

1.1 Signing in

1. Go to your EM8 Portal address in any modern browser (Chrome, Edge, Safari or Firefox).
2. Enter the email address and password supplied when your account was created.
3. From the left-hand menu, choose EM8 Core.

EM8 Core opens on the Dashboard. Every part of the module is a tab across the top of the page — click a tab to move between areas. The web address updates as you go, so you can bookmark a tab you use constantly (for example the Diary) and land straight on it next time.

If you see an upgrade screen instead: Your account does not yet have an active EM8 Core subscription. Contact Engineer M8 or visit Billing to activate it.

Changing your password

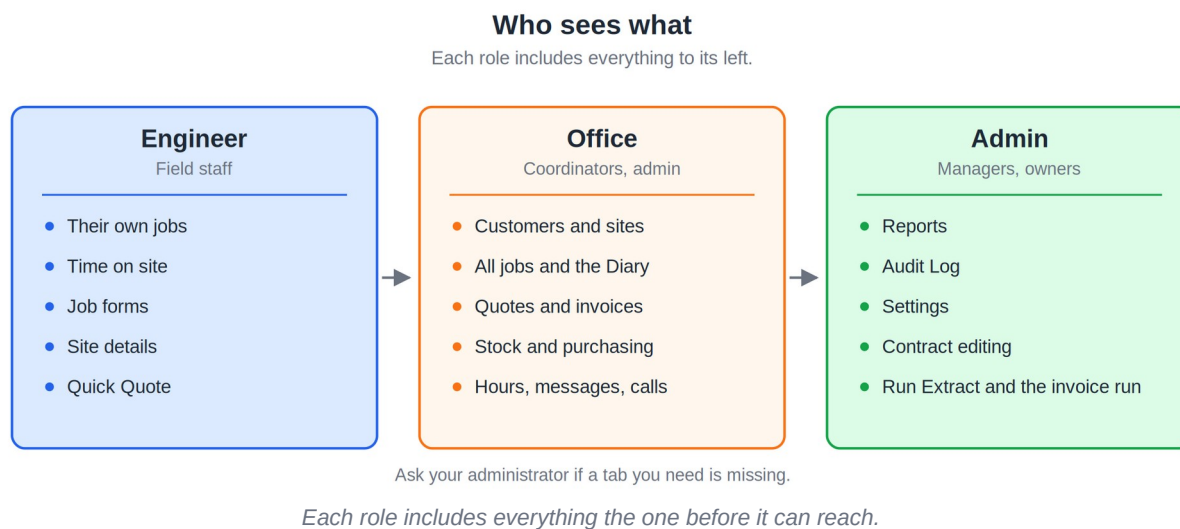
Click your name at the top right of the portal and choose Profile. Change password asks for your current password and the new one twice. It takes effect straight away and nobody else needs to be involved.

Engineers

Engineers do not normally use the browser at all. Their side of the system is the EM8 HQ app on their phone, which is covered in Section 13.

1.2 Who sees what

EM8 Core shows different tabs depending on the role attached to your login.



Role	Typically	What they can reach
Engineer	Field staff	Their own assigned jobs, time recording, job forms, site details and job completion — normally from the EM8 HQ app (Section 13).
Office	Coordinators, admin staff	Everything day-to-day: customers, sites, jobs, diary, quotes, invoices, stock, purchasing, hours, messages and calls.
Admin / Super Admin	Managers, owners	All of the above plus Reports, the Audit Log, Settings, contract editing and the monthly maintenance runs.

1.3 Finding your way around

- Search boxes appear at the top of most lists. On Jobs you can search by job number, customer, site or fault text.
- Filters sit next to the search box — status, priority, engineer, date range. They combine, so "Open + Urgent + unassigned" is one click each.
- Refresh reloads the list without reloading the whole page. Use it if a colleague has just added something.
- Clicking a row opens the full record. Clicking a linked customer, site or invoice inside a record jumps you to that record with it already open.
- Coloured tags tell you status at a glance. Red means attention needed, blue and green mean progressing or done.
- Job search looks at more than the job number. It also matches the customer's purchase order reference and their own job reference, so a customer ringing up quoting their PO number can be found on it.
- The Jobs list has a Job Type filter alongside status, priority and engineer — the quickest way to pull out every planned maintenance visit, or everything that is not one.

The tab bar has been regrouped. There are now ten tabs rather than seventeen, and four of them hold more than one screen:

- Customers holds Customers and Sites. A site only exists as part of a customer, so the two sat oddly as separate tabs. The Sites list still searches every site you have.
- Sales holds Enquiries, Surveys and Quotes — the pipeline in the order it happens.
- Billing holds the Invoices ledger alongside the two invoicing worklists.
- Stock & Purchasing holds Products, Suppliers and Purchase Orders.
- Comms holds Messages and Calls.
- Reports holds Reports, the Audit Log and Hours.

Old links and bookmarks still work. A saved link to Quotes or Invoices opens the right sub-tab rather than a blank page.

2. First-time setup (Settings)

Do this once, before you start logging jobs. Settings is admin-only and sits at the far right of the tab bar.

2.1 Company Profile

Your company name, address, phone, email, website and VAT number. These details appear on the job sheets, quotes, invoices and extract sheets you send out, so get them right first.

1. Go to Settings → Company Profile.
2. Click Edit, fill in each field, then Save.

The VAT number is not decoration. It is also what tells the system you are VAT registered. Leave it blank and invoices are raised without VAT on them. If your invoices are coming out without VAT, this is the first thing to check.

2.2 Branches / Offices

If you operate from more than one depot, add each one here with a short code, address and contact details. Jobs and engineers can then be grouped by branch.

2.3 Call Types

Call types are your categories of work — for example Reactive Callout, Planned Maintenance, Installation, Remedial Works or Small Works. Each call type has:

- a Code (short, e.g. REACT);
- a Name (what staff see in the dropdown);
- a Default Priority (Low, Normal, High or Urgent);
- a Billable by default switch, so maintenance visits do not accidentally get invoiced;
- an Active switch, so retired types disappear from dropdowns without deleting history.

Worth the effort: Call types drive your reporting, your SLA targets and which forms an engineer is asked to fill in. They also decide where maintenance jobs are filed — keep a type coded PPM or named Maintenance and the monthly extract will use it. Spend ten minutes getting this list right and everything downstream is easier.

2.4 Response Times (SLA)

An SLA policy says how quickly you have promised to respond. Policies can be set generally, per call type, or for one specific customer — the most specific match wins.

1. Go to Settings → Response Times and click Add policy.
2. Choose the Customer and/or Call type the policy applies to, or leave both as "Any" for a default.
3. Set Respond within (minutes) — the clock starts when the job is logged and stops when an engineer is first assigned.
4. Optionally set Resolve within (minutes) for a fix-time target.
5. Set the at-risk percentage — for example 80% means a job is flagged before you breach, not after.
6. Tick Active and save.

2.5 Engineers

Every engineer who will be assigned work needs a profile here.

1. Go to Settings → Engineers and click Add Engineer.
2. Enter a Display Name and an Engineer Code (e.g. ENG01).
3. Add their mobile number and engineering area.
4. Enter their Home Postcode. This is what the automatic scheduler measures travel from — without it the engineer is left out of every plan.
5. Enter Hourly Rate and Daily Rate if you want cost figures on reports.
6. Tick their Working days — Monday to Sunday. Untick any day they do not work. Nothing can be booked into their diary on an unticked day, from any screen.
7. Link their Portal User ID. This is the important one — it connects the engineer profile to a login, which is what lets them see their own jobs and record their own time. Without it they cannot use the system in the field.
8. Set Status to Active and save.

Engineer seats: Your EM8 Core package includes a set number of engineer seats. The Engineers page shows how many you have used and how many are left. If you need more, speak to Engineer M8.

Working days

Every engineer has a set of working days. Most are Monday to Friday, but an engineer who does not work Mondays or Fridays is exactly the case this exists for. Untick the days and three things follow:

- The Diary hatches those days out in their column and labels them Not working. Nothing can be dropped or double-clicked into them.
- Assign Engineer and the Visits card refuse a date that falls on one, and say why.
- Auto Schedule leaves them out when it plans the month.

Personal diary entries — leave, training — are still allowed on any day, so a diary can hold the reason someone is off.

Inactive engineers stay inactive

Setting an engineer to Inactive used to be undone the next time their login was checked. It is not any more. An engineer you have deactivated stays deactivated until somebody reactivates them.

2.6 Forms & Surveys

Forms are the checklists, service certificates and surveys your engineers complete on site. EM8 supplies a set of defaults you can adopt as-is, and you can build your own from scratch.

Adopting an EM8 default form

1. Go to Settings → Forms.
2. Find a template marked EM8 default and click Preview to check it suits you.
3. Click Adopt. You now have your own editable copy.

Telling EM8 where a form belongs

A form is no longer offered on every job. Each template carries one or more rules saying which work it belongs on — a call type, a system type, or a name pattern such as Fire Alarm or CCTV. An engineer opening a job sees the forms that match the work in front of them and no others.

That matters more than tidiness. An engineer scrolling twenty forms to find the right one stops filling any of them in, and a form completed against the wrong discipline is a certificate saying something nobody checked.

Two things follow from it:

- A form with no rule against it will never reach an engineer. If a form is not appearing on site, this is the first thing to check.
- When you adopt an EM8 default and customise it, check the rules came across with it. Adopting copies them, but a rule saved blank on the settings screen counts for nothing.

Where the job names a specific system, the rules are matched against that. Where it does not, they are matched against the systems recorded at the site — so a CCTV-only site never offers the fire alarm certificate.

Building your own form

1. Click New form and give it a Form name, a Code and a Discipline (e.g. Fire, Security, Electrical).
2. Choose what it is Used for — a job form, a certificate or a site survey.
3. Add sections, then add questions to each section.
4. For every question set the Answer type: text, number, yes/no, tick box, dropdown, date, photo, signature or repeating rows.

5. Mark questions Required where an answer is non-negotiable, and add Helper text where an engineer might need guidance.
6. Use Applies when to attach the form to particular job types or disciplines, so it appears automatically on the right jobs.
7. Tick Active and save.

Changing a live form: Use New version rather than editing in place. Submissions already completed stay attached to the version that was current at the time, which keeps your records defensible.

Repeating rows: A repeating-rows question is a small table the engineer adds lines to — one per device tested, say. Its columns are typed one per line as key|Label|type, where type is text, number or select. A select column needs its options after the type, comma-separated: result|Results|select|Pass,Fail,N/A. The form will not save a dropdown column with no options.

2.7 Xero

EM8 Core can be linked to your own Xero organisation, so the invoices you raise here appear in Xero without being keyed twice, and the payments your bookkeeper records in Xero come back here without anyone marking them paid by hand.

Connecting

1. Go to Settings → Xero. Connecting is admin-only.
2. Click Connect to Xero. You are taken to Xero to sign in and choose the organisation to link, then brought back.
3. The page shows the organisation name, a Sync switch, the two automation switches described below, and a log of what has gone across.

The two switches

Both are off until you turn them on. With both off, EM8 Core never sends anything to Xero on its own and Xero never emails anyone.

- **Send to Xero automatically** — on: finalising an invoice pushes it to Xero straight away. Off: invoices are finalised here and you send them across when you choose, one or many at a time (see Sending in bulk).
- **Email invoices from Xero automatically** — on: once an invoice lands in Xero, Xero emails it to the customer using your Xero invoice template. It sends once only — a resync never sends it again. If the contact in Xero has no email address, nothing is sent and the attempt is recorded in the sync log.

What goes across

- With Xero linked, the button on an invoice reads Finalise, or Finalise & send to Xero when auto-send is on. Without a Xero link it still reads Mark Sent. Whichever it says, drafts stay here until you press it — Xero only ever sees an invoice you have decided to issue.
- The customer is matched to a Xero contact by name, and created there if there is no match.
- The invoice number is used as the Xero reference, so the two ledgers can be read side by side.
- Payments applied in Xero are recorded against the invoice here with the date, amount and reference — usually within moments, and within fifteen minutes at most. The invoice moves to Paid without anyone touching it.

- A payment recorded in EM8 Core against an invoice that has not been sent to Xero yet waits too. It goes across when the invoice does.

Sending in bulk

With auto-send off, Invoices → Send to Xero... opens a picker of every finalised invoice not yet in Xero, all ticked. Untick any you want to hold back and click Send. They go one at a time, so one bad invoice does not stop the batch; anything that fails is queued and retried, and shows as Error on the list.

The Xero column on the Invoices list tells you where each one stands: In Xero, Not sent or Error.

Pausing and disconnecting

Turn the Sync switch off to pause. Invoices finalised while it is off wait in the queue and go when it is turned back on. Disconnect ends the link: anything already in Xero stays there, and nothing further moves in either direction.

If the page says Xero needs reconnecting: the link has expired or been revoked at the Xero end. Click Reconnect and sign in again. Nothing is lost — the queue holds anything that could not go across and sends it once the link is back.

2.8 Alerts

Settings → Alerts. This one is only worth setting up if you also have Tracking Guardian, because it works by comparing the diary with where the engineer's van actually is. It starts switched off and sends nothing to anybody until you turn it on.

What it is for

It answers the question the office asks at ten past nine. The job was booked for nine, nobody has tapped Arrived on site, so where is he? At the grace point the system looks up the vehicle assigned to that engineer in the fleet record, compares its last reported position with the site, and says what it finds.

- If the van IS at the site, only the engineer is told, and what he is told is to tap Arrived. He is not late — the timestamp is simply missing, and telling the office he is late would earn him a phone call he did not deserve.
- If the van is somewhere else, the engineer and the office both get it, with the distance — and, if he is still clocked on to another job, which job that is.
- If the system cannot tell, it says nothing. No vehicle assigned to that engineer, no tracker on the van, a fix too old to trust, or a site that was never geocoded all count as cannot tell.

The settings

Setting	What it does
Alerting	The master switch. Off by default.
Grace period	How many minutes after the booked time before it counts as late. Fifteen is a sensible start.
Counts as on site within	How close to the site counts as being there. 750 m by default — the same figure the Tracking Guardian vehicle check uses, so the two features never disagree about where a van is.
Stop checking after	How long after the booked time to keep looking. Two hours by default, which stops a job nobody ever attended generating alerts all day.

Setting	What it does
The engineer / The office	Who gets told.
Also tell the office when it cannot tell	Off by default. Worth turning on for the first week: the cannot-tell list is the fastest way to find out which fleet records are out of date. Turn it off once they are fixed.
Skip an engineer's non-working days	A job sat in the diary on a day he does not work is an office error, not his problem.

Setting it up

1. Go to Settings → Alerts.
2. Click Test now before anything else. 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 and leave the radius at 750 m to begin with.
5. Choose who gets told.
6. Turn Alerting on and save.

Test it first: Three separate things all have to be right for this to be worth reading: the job's scheduled time, the site's coordinates, and which van the engineer is in. Test now tells you which of the three needs attention, and costs nobody a phone buzz.

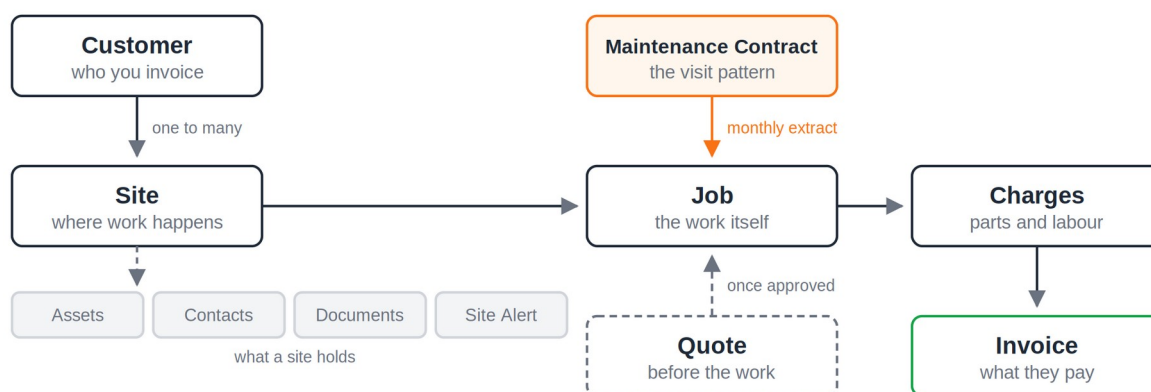
Each verdict fires at most once per job per day, so nobody is pestered. Every alert is also written to the job's own activity log, so afterwards the job tells its own story without anyone having to go and look at an alert list.

3. Customers and sites

A Customer is who you invoice. A Site is where the work happens. One customer can have hundreds of sites — a facilities company, for example — and every job is logged against a site.

How the records fit together

A customer is who you invoice. A site is where the work happens.



An approved quote becomes a job, carrying its lines across as charges.

Everything in EM8 Core hangs off the customer and the site.

3.1 Adding a customer

1. Go to the Customers tab and click New Customer.
2. Enter the Customer Name, main contact name, phone, mobile and email.
3. Enter the billing address: Address Line 1, Town and Postcode.
4. Add an Invoice Email if invoices go to a different address than general correspondence.
5. Set VAT Registered and enter the VAT Number if applicable.
6. Set Credit Limit and Credit Days if you run accounts.
7. Tick Auto-send completed job sheet if this customer should receive the job sheet by email automatically once one of their jobs is sent to billing.
8. Set Status to Active and save.

The customer list shows, for each account, its town, postcode, telephone, how many sites it has and how many jobs are currently open — a quick way to spot an account that is running away from you.

About Auto-send: When it is ticked, the job sheet goes out the moment the office sends one of their jobs to billing — once per job. It goes to the site's email address where one is set, otherwise the customer email, then the invoice email. Every attempt is logged on the job record with the address it went to, so "did they ever get it?" has a real answer weeks later. The office can also email a sheet on request from the job at any time, whether or not this is ticked.

3.2 Adding a site

1. Open the customer and click Add Site, or go to the Sites tab and create one there.
2. Enter the site Name and full address including postcode.
3. Add the Fire Authority if relevant to your discipline.
4. Save. The site is now selectable when logging a job.

The postcode is not optional in practice: EM8 locates the site from its postcode as you save, and that location is what the automatic scheduler uses to build sensible routes. A site with no postcode can never be scheduled automatically.

3.3 What you can hold against a site

Open any site to see its full record. Each panel below is worth filling in — it is what turns EM8 Core from a job list into a proper asset history.

Panel	Use it for
Contacts	Site-level people — caretaker, facilities manager, key holder. Name, phone, mobile, email.
Assets	Replaced by Equipment & cover — see below.
Maintenance Contracts	Now shown inside Equipment & cover. Contract name, dates, annual value, invoice cycle and the visit pattern — what the monthly extract reads. See Section 6.
Site Documents	Upload as-fitted drawings, risk assessments, O&M manuals, previous certificates — click Upload or drag the files straight onto the panel. Preview or download them from any job at that site.

Panel	Use it for
Site Alert	A warning message that pops up whenever anyone opens the site — "dog on site", "report to gatehouse", "no lone working". Flag the site High Risk if needed.
Notes	Free-text history that everyone can see.
Jobs / Service Visit History	Every job ever logged at this site, and when the next service is due.
Linked assets	If the site also has EM8 monitored equipment (for example Surveillance Guardian or FireLog kit), link it here so the asset list stays in step. Equipment & cover The site record used to carry four separate tabs — Assets, Installed Kit, Systems and Maintenance. None of them knew about the others, and that is exactly how a contract ends up billed with no visit schedule behind it: the money was on one tab, the schedule on another, and no screen put them together. They are now one tab. Each system on the site is a row showing: • Its cover — Covered, Due soon, Overdue, No schedule set, or Not maintained. • Its service interval and next due date. • The contract paying for it, and what that contract is worth. • The equipment inside it, including anything read across from Surveillance Guardian or FireLog. Two of those statuses are worth knowing. No schedule set means a system is marked as maintained but nothing will ever raise a visit for it — the customer may be paying for maintenance nobody is planning. Not maintained means no cover is expected, which is a different thing and not a fault. The maintenance contracts sit underneath, in the same place, so the money and the schedule are read together rather than on separate screens. Adding and editing a system. Systems are added and edited on this tab. Use Add system for anything new, and open an existing row to change it. Each system carries its own maintenance settings, and these are the ones that matter: • Discipline — Fire Alarm, Intruder Alarm, CCTV, Access Control, Emergency Lighting, Sprinkler & Suppression, AOV and so on. It is required. Discipline is what the forms engine, the SLA targets, the certificate standards and the charges-versus-schedules reports all key off, so a system without one is invisible to all of them. • Maintained — whether a visit is expected at all. A system that is not maintained is never scheduled and never appears as overdue. • Contract — the contract that pays for it. Linking the two is what lets a site show its money and its work together, and what the reports in Section 12.3 compare. • Service interval and visits per year — how often it is due, where the system is on a different cycle to the rest of the contract.

Tip: The Log Job button sits right on the site record. Logging a job from the site means the customer, address and asset list are filled in for you.

3.4 Moving a site to another customer

Data imported from an old system often has the same customer set up several times over, each with a site or two. Rather than re-keying, move the sites under the right customer record and delete the empty ones.

1. Open the site. Move to customer sits in the header next to Edit — admin only.
2. Search for the customer it should belong to and select it.
3. Read the warning, then click Move site.

What goes with it

Everything on the site that names a customer is re-pointed in one go: jobs, service contracts, quotes, invoices, notes, form submissions, certificates, enquiries and the site's own contacts. Nothing is left saying the old customer. The move is written to the Audit Log against the site and both customers, and the confirmation tells you what moved — "Site moved with 14 jobs, 2 service contracts".

What stays behind

Contacts and notes recorded at customer level — not on the site — stay on the old customer record. If there is anything worth keeping on one, copy it across by hand before you delete the empty record.

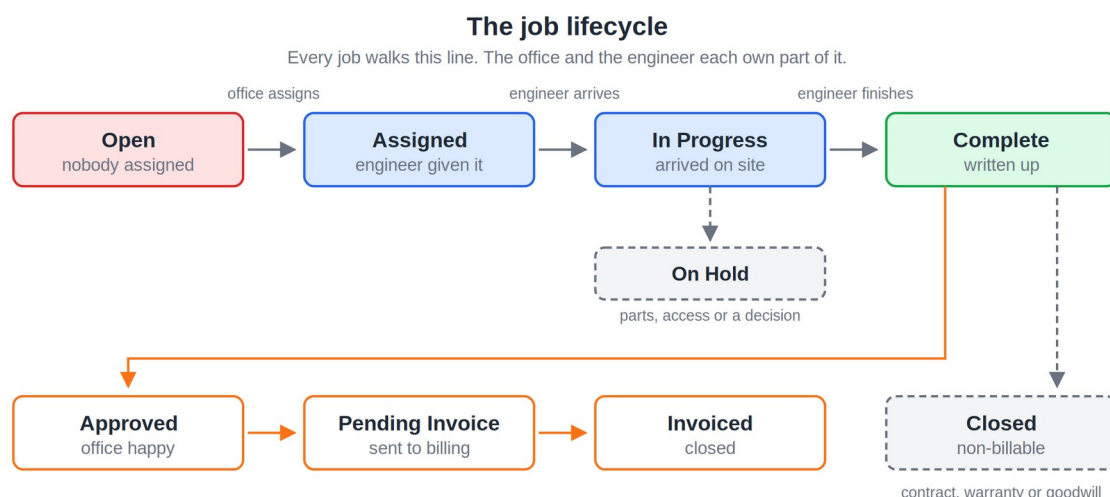
Merging duplicates: open each wrong customer, move its site onto the right one, then delete the now-empty customers. If two duplicates each had a contract, both contracts end up on the one customer — that is correct, they are different contracts.

4. The job lifecycle

This is the core of EM8 Core. Everything else supports it.

4.1 The stages a job goes through

Status	Means
Open	Logged, nobody assigned yet. Shows red — it needs someone.
Assigned	An engineer has been given the job. The SLA response clock stops here.
In Progress	Work has started, or the engineer has arrived on site.
On Hold	Waiting on parts, access or a customer decision.
Complete	The engineer has finished and written up what they did.
Approved	The office has checked the write-up and is happy with it.
Pending Invoice	Sent to Billing and waiting to be invoiced.
Invoiced	An invoice has been raised. The job is closed financially.
Closed	Finished with no invoice — either pre-charged under a contract, or closed without charge with a reason on the record.
Cancelled	Called off. Kept for the record but out of your live lists.



Changing a status by hand

Status is not a field you edit. It used to be — the Edit form had a dropdown with every state in it, and a job set to Invoiced there vanished from every queue with nothing raised. The dropdown has gone, and every closing state now has exactly one route to it:

- Complete — the engineer's Complete button.
- Pending Invoice — Send to Billing on the job.
- Invoiced — Create Invoice, or Mark Invoiced for an invoice raised outside the system, both on the Billing list.
- Closed — Pre-charged close or Close without charge, both on the Billing list.

What the office can still do by hand is on the job header: Put on hold, Resume, Mark In Progress, Cancel (a reason is required) and Re-open a cancelled job. None of those ends a job, so none of them can bypass billing. Each one is written to the job's Actions and the audit log with who did it and why.

4.2 Logging a job

1. Go to the Jobs tab and click New Job (or click Log Job from a site record).
2. Select the Customer, then the Site.
3. Choose the Job Type — this is one of the call types you set up in Settings.
4. Enter a short Job Title (what appears in lists) and the Fault Description (what the caller actually told you — the more detail here, the fewer return visits).
5. Set the Priority. It defaults from the job type but you can override it.
6. Set Scheduled At if you already know when it is going.
7. Add the customer's PO Reference if they have given you one. It carries through to the invoice.
8. Save. The job gets a number and appears in the Open Jobs list.

Maintenance jobs are different: Contracted maintenance visits are not logged by hand one at a time. They are created for the whole month in one run — see Section 6.

Logging a job from the app

Engineers can raise a job from the EM8 HQ app — the customer who collars them on site for something extra, or the call that comes in when the office is closed. The job is assigned to the engineer who raised it, its record says so, and the office is notified. See Section 13.3.

4.3 Assigning an engineer

There are two ways, and they do exactly the same thing behind the scenes:

- From the job — open it and click Assign Engineer, then pick from the list.
- From the Diary — drag the job onto an engineer's slot for the day and time you want.

Either way, the job moves from Open to Assigned, the engineer's own job list picks it up, and your SLA response time is recorded as met.

Engineers are now notified. A push notification goes to the engineer's phone when a job is assigned to them, taken off them, reassigned, or when its scheduled time is moved — and when their monthly route is issued. They also see it in the app's notification list. The engineer needs the EM8 HQ app installed and to be logged in; for anything genuinely urgent, a phone call is still worth it.

A date and time is now required.

The diary only shows jobs that have a scheduled time. Assigning without one used to produce a job that reached the engineer's phone and appeared on nobody's calendar — invisible to the office, impossible to drag, and with no way to take it back off. The Assign Engineer window now asks for the date and will not save without it.

It also asks how long to allow — thirty minutes through to two days, an hour by default. The diary draws the job at that length, so a full-day install and a fifteen-minute call-out no longer look identical and you can see when an engineer's afternoon is already spoken for.

Taking a job off an engineer.

- On the job — Unassign, next to Assign Engineer. The job returns to the unassigned pool and the engineer is told it has left their list.
- On the diary — right-click the job tile. Unassign engineer does the same; Remove from diary clears the time slot but leaves the job with the engineer.

Unassigning deliberately keeps the scheduled date. A job planned for Thursday that needs a different engineer is still a job for Thursday.

Jobs that take more than a day

Assign Engineer asks how long to allow. Up to a full day blocks that much of the engineer's diary. Anything longer is booked as one visit per working day — a sixteen-hour install becomes two days, not one block running past midnight — with weekends skipped unless the engineer works them.

The days it chose are on the job's Visits card, on the Details tab. Visit 1 is the assignment itself. Add visit puts another day in the diary against the same job: pick the engineer (it defaults to the assigned one), the date, the start time, the hours and a note such as "Day 2 — second fix and commissioning". Each visit is its own tile in the Diary and appears in the engineer's Today list on the right day. Delete removes a visit; the first one is changed through Assign Engineer.

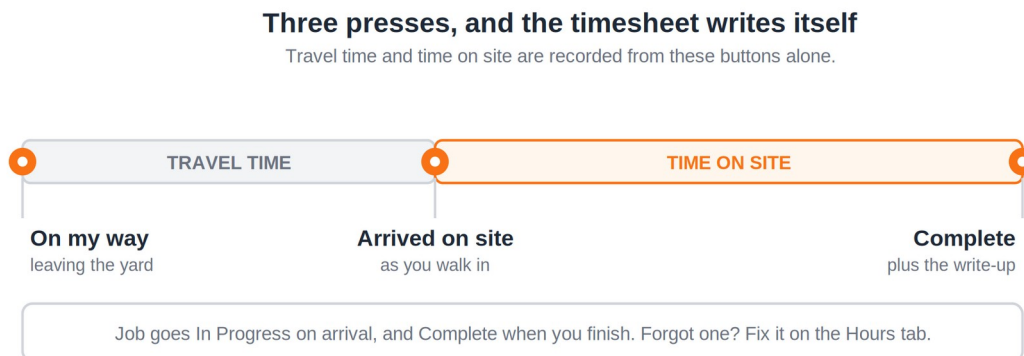
The card warns when it sees more than ten hours on a single visit, which is almost always a job that should have been two.

Days an engineer does not work

If the date you pick falls on a day the engineer does not work (Section 2.5), the assignment is refused and the message says which days they are off. The same check runs on the Diary and the Visits card, so there is no back door.

4.4 What the engineer does on site

Engineers work from the EM8 HQ app on their phone (Section 13 covers the app screen by screen). Their day looks like this:



Three presses give you travel time and time on site, with no timesheet to fill in.

1. Open the job and press On my way. Travel time starts recording. If they have other jobs at the same site, one tick applies it to all of them.
2. On arrival, press Arrived on site. The on-site clock starts and the job moves to In Progress.
3. Read the Site Alert, and check the site's Installed Kit and documents before starting.
4. Work through the Forms on the job — checklists, service certificates, asset checks — adding photos where asked, and submit each one. A form marked mandatory must be submitted before the job can be completed.
5. Add Notes for anything the office needs to know, and take Photos of the work.
6. If extra work is needed, raise a Quick Quote on the spot and have the customer sign for it (Section 7.2).
7. Press Complete. One screen: Work carried out, Recommendations, the engineer's own signature, and the customer's sign-off with the name of the person signing. The clock stops and the job becomes Complete.

The form is the write-up

A completed form is carried onto the job. What the engineer wrote under Work carried out and Parts used becomes the job's Action Taken; Defects and Recommendations become the job's Recommendations; the form's photos become the job's photos; and a next-service-due answer moves the system's next service date. The job sheet then prints each of those once, in its own section, with the rest of the form — the inspection checklist — underneath.

That is why the forms no longer ask for a signature: the job's sign-off at Complete is copied onto the form, so a signature question only produced a second ask. If you built your own templates before this change, remove the signature and next-service-date questions from them.

Charges

Engineers see the job's charges in the app but do not add them there. Parts priced on site go through Quick Quote, which the customer signs for; everything else is added by the office from the job's Charges panel when the write-up is checked.

If a second visit is needed, the engineer uses Left site — return needed rather than Complete. The job stays open and a new visit is recorded when they return.

4.5 What the office does next

1. Open the completed job and read the write-up, forms and photos. Anything the engineer put on a form is already on the job, so read it once.
2. Check the charges are right — add anything missed, remove anything that should not be billed.
3. Click Approve if you are happy with it.
4. Click Send to Billing. The job moves to Pending Invoice 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, with the charges and any contract cover in view — that is where the decision is made, with a reason required (Section 8.1).

Job sheets to the customer: If the customer has Auto-send completed job sheet ticked on their record, the job sheet is emailed to them automatically the moment you send the job to billing — once per job, so invoicing it afterwards does not send a second copy. You can also email one at any time with Email job sheet, or print one from Print / PDF.

Chasing the paperwork

The Jobs tab carries a Waiting on engineer card: jobs booked in, the day gone, and nothing sent back. Click it to see just those jobs.

Nothing else answered that question. Open counts everything, Unassigned counts what has not gone out, and Overdue counts against the customer's deadline — so a visit done on Tuesday and never written up looked exactly like one booked for next Tuesday, and the first anyone heard was the customer asking where their certificate was.

A job appears on the card a day after its scheduled time, so an engineer finishing at five is not chased at five.

4.6 Everything on a job record

Panel	Contains
Details	Customer, site, job type, priority, status, PO reference, customer reference, logged / scheduled / completed timestamps. Maintenance jobs also show the contract they came from. The status buttons — Hold, Resume, Cancel, Re-open — sit on the header.
Engineer	Who is assigned, and the buttons to assign, reassign or unassign.
Visits	Every date the job is booked for. Visit 1 is the assignment; Add visit books further days against the same job (Section 4.3).
Time	Every visit: travel, arrival, departure, total on site. Visits can be added manually if someone forgot to press a button.
Actions	A running log of what was done, by whom and when.
Notes	Internal commentary that does not go on the job sheet.
Charges	Parts and labour with quantity, unit price, VAT and line totals, plus the job's net and gross value.
Forms	Any checklists, certificates or surveys attached to this job, with their completed / signed status. Mandatory forms are marked, and a completed form's write-up, photos and signature are carried onto the job.
Quotes	Any quote raised from this job, including Quick Quotes signed on site.
Print / PDF	Generates a job sheet you can print or save.
Email job sheet	Emails the job sheet to the customer there and then. Office only, and available from Complete onwards. It sends whether or not Auto-send is ticked on their record —

Panel	Contains
	the tickbox governs the automatic send, not whether you may ever email a sheet.
Job sheet emails	On the Details tab: every send, when it went, the address it went to, and the reason for any that failed. This is what answers “we never got it” three weeks later.
Certificates	Any certificate issued from this job, its number, and the log of who it was emailed to and when. See Section 4.7.

4.7 Certificates

A certificate is the document that says a system was inspected or commissioned, by whom, against which standard, and what state it was left in. EM8 Core produces them from the completed job, so the certificate and the job it came from can never drift apart.

Certificates cover both halves of the work:

- Maintenance certificates — the periodic inspection and test. These ask what proportion of the system was tested, what faults were found, and whether it was left fully operational.
- Installation certificates — a new system handed over. These ask who designed it, who commissioned it, the date it was commissioned and what documentation the customer was given. They do not ask a test percentage, which means nothing on a system commissioned in full on day one.

Issuing one

1. Open the completed job and click Generate Certificate.
2. Check the standard on the dropdown. It is chosen from the discipline of the work, and changing it changes the questions you are asked.
3. Answer the questions — extent of the system covered, any variations from the standard, faults found, and whether the system was left operational.
4. Click Generate & preview. You get the real PDF, not a mock-up of it. Read it.
5. Go back and change the answers if anything is wrong, or Download it if you want a copy before sending.
6. Click Email to customer, check the address, and Send.

Read the preview. The preview step exists to be used. The document goes out with your company name and your accreditation on it, and the two minutes it takes to read it is the cheapest quality check in the system.

What happens to it

- The PDF is filed against the site, in the site documents, so it is there next time anyone opens the site — including the engineer on the next visit.
- It attaches to the job it came from, with its certificate number.
- Every send is logged with the address it went to and the date. If a customer says they never received it, there is a real answer.
- If the address you type is not the one on file, it is saved back to the customer, so the next certificate does not ask again.

Getting one wrong

A certificate that has been issued is not edited. Void it, giving a reason, and issue a replacement. The voided one stays on the record marked as void.

That is deliberate. A certificate is a statement about a life safety system on a given date, and a document that can be quietly rewritten afterwards is worth nothing to an auditor, a fire officer or an insurer.

The standards are kept current. EM8 holds the standard reference for each certificate type and keeps it up to date — so a certificate leaving your office does not cite a version of the standard that was withdrawn years ago. If you hold a certificate type EM8 does not, ask and it will be added.

5. The Diary

The Diary is your scheduling board. It shows every engineer's day side by side so you can see who is free, who is stacked, and where the gaps are.

5.1 Scheduling work

1. Go to the Diary tab. Use Today and the date controls to move around.
2. Drag an unassigned job onto an engineer's column at the time you want it.
3. Or click New Entry to create a diary item directly — give it a Title, Description, Start and End, choose Assign To (engineer) and pick a Colour.
4. Drag an existing entry to move it, or drag its edge to change its length.
5. Click an entry to edit or delete it.

Colours are yours to use as you like — many companies colour by discipline (fire, security, electrical) or by job type (reactive vs planned) so the week reads at a glance.

Remember: Dragging a job into the diary assigns it, and the engineer is notified. Moving it afterwards notifies them again with the new time — so keep the diary honest rather than ringing round with changes.

Right-clicking a job tile

A left click opens the job. Right-clicking gives you the two actions that had no home before:

- Remove from diary — clears the time slot but leaves the job with the engineer.
- Unassign engineer — returns it to the unassigned pool and keeps the date. The engineer is told it has left their list.

Jobs with no engineer are always visible

The Unassigned column now appears whenever it holds work, even when you have filtered to particular engineers. Selecting three engineers reads as “their work, plus anything still needing an owner”.

This was worth fixing. A job can be booked for a Tuesday morning with nobody against it — it does not appear in the Unassigned list, because it has a date, and it used to vanish from the calendar the moment anyone filtered by engineer. A booked visit nobody is doing is the one thing a planner most needs to see.

The Unassigned panel now also carries a short amber list at the top, Booked, no engineer, for the same reason.

Job tiles are drawn at their real length

A job now blocks out the time set against it when it was assigned rather than a fixed hour, so you can see when a day is genuinely full. Dragging a job changes when it starts, never how long it takes.

Days an engineer does not work

In day view, an engineer's column on a day they do not work is hatched and labelled Not working. Nothing can be dropped or double-clicked into it. In week view the same happens to whole days once you have filtered

to a single engineer. A drop that gets past the hatching is refused anyway, and the message says why rather than reporting a move that did not happen. Set the days on Settings → Engineers.

Jobs booked across several days

A job with more than one visit draws once per visit — the 8th from the job, the 9th from the second visit, nothing twice. Each tile can be dragged on its own. To add or remove a day, use the Visits card on the job (Section 4.3).

6. Maintenance contracts and the monthly run

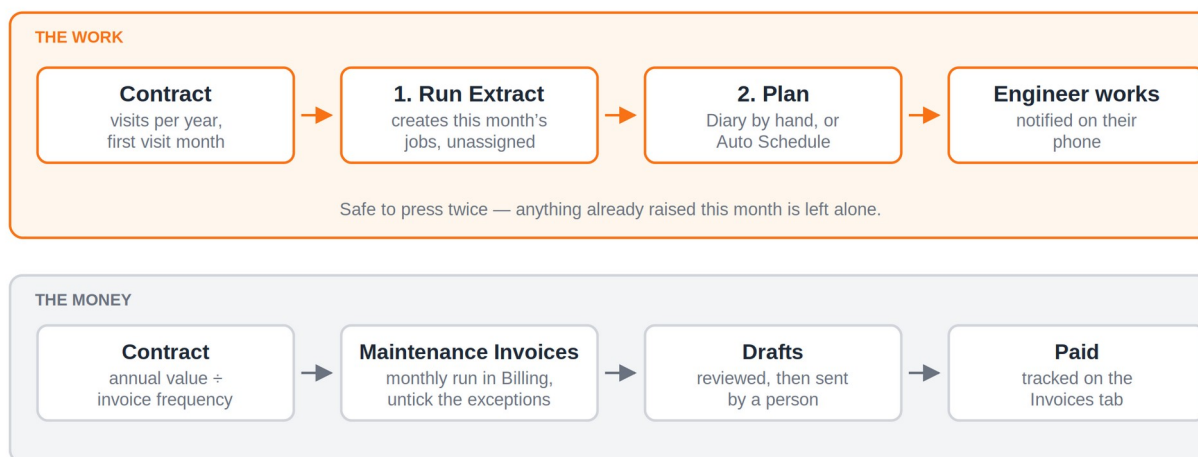
If you hold service contracts, this is the section that saves you the most time. The contract describes the visit pattern once. Every month you press a button, the month's work appears as jobs, and a second button routes it to engineers.

The routine is three steps, in this order:

- Run Extract — create the jobs that are contractually due this month.
- Plan them — by hand in the Diary, or with Auto Schedule.
- Invoice — a separate monthly run in Billing, on the contract's own cycle (Section 8.4).

The monthly maintenance routine

The contract holds the pattern. You press two buttons a month.



Billing follows the contract's cycle, not whether the visit happened yet.

The work and the money run on separate tracks, from the same contract.

Nothing here happens by itself. Every run is something a person clicks, after seeing a preview of exactly what it will do. That is deliberate — an unattended run that gets it wrong reaches your customers before anyone here knows about it.

6.1 How a contract describes its visits

Open a site, go to the Maintenance Contracts panel, and add or edit a contract. Editing contracts is admin-only.

Field	What it does
Contract Name	What the contract is called on the extract sheet and the job title.
Start Date / End Date	The contract term. An expired contract stops producing visits.
Visits Per Year	Any number — 1, 2, 4, 6, 12 or anything else. Enter 0 where the contract buys no visit at all. This is the single most important field.
First Visit Month	Which month the pattern starts from. 4 visits a year from January gives January, April, July and October.
Visit Months	An override for contracts that are not evenly spread. Enter the actual months, e.g. 1,4,8,12. Leave blank to use the even spread.
Annual Value	What the contract is worth for a year. The invoice run divides this by the invoice frequency.
Invoice Frequency	How many invoices a year. £6,000 billed quarterly is £1,500 a time.
First Payment Date	When billing starts. The invoice run works forward from here.
Next Visit / Next Invoice Date	Where the contract currently stands. Kept up to date as runs are made. Discipline, and what the contract actually buys The contracts list now shows a discipline — Fire Alarm, CCTV, Intruder Alarm and so on — with the original billing code underneath it in small text, so anyone used to searching on the old code still can. Each contract also records what it buys, which is not always what its name suggests: • Maintenance — somebody attends. These are the contracts the extract raises visits for. • Monitoring — an alarm receiving centre watches the signal and nobody attends. Recurring revenue with no visit, and that is correct rather than a gap. • Call-out cover — labour and call-outs included, no visit scheduled. A Gold or Platinum CCTV contract is usually this. A single contract can be more than one of these. Maintenance and monitoring sold together on one line is common, and the visit half is what the extract plans. Only maintenance contracts are expected to carry a visit pattern. A monitoring line showing no visits per year is not a problem and is no longer flagged as one — which matters, because a warning that fires on healthy contracts is a warning people stop reading. Enter 0 rather than leaving it blank. Monitoring, a router rental, a standing charge — these are real contracts that buy no site visit. Put 0 in Visits Per Year and the contract is treated as settled rather than unfinished: it stays off the extract's problem list and shows a plain 0 on the site record instead of an amber warning. Blank means nobody has said yet, and that is the case worth chasing. Zero means somebody has decided. Keeping the two apart is the whole point — a list of problems that includes healthy contracts stops being read within a

Field	What it does
	month. Completing a visit moves the date on When a maintenance job is completed, the system it services has its next service date moved forward — including jobs raised by Run Extract, which cover every maintained system on the contract. The date advances on completion, never when the job is created. An uncompleted visit leaves the date in the past where it shows as overdue and somebody asks about it. And it is anchored to the date the visit was DUE, not the day it happened: a quarterly visit due 1 January and done 15 February sets the next one to 1 April, not 15 May, so six weeks of slippage does not quietly become three visits a year instead of four. A fault call on the same system does not move the date. Only planned work does, otherwise reactive visits would mask a missed service.

The failure worth watching for: A contract with no visits per year and no visit months can never produce a visit. The customer is paying for maintenance that nobody is planning. Those contracts are listed every time you preview the extract — that list is there to be cleared, not scrolled past.

Cancelling a contract

Set a contract's status to Cancelled and the systems it was paying for come off maintenance in the same save. A system is stood down if it is linked to that contract, or unlinked and of the same discipline — unless another live contract on the site still covers it. A customer moving their fire alarm from a gold to a platinum contract has not stopped paying, so cancelling the old one leaves the system alone.

The system keeps its contract link so the history shows what used to cover it; only the Maintained flag changes, and each one gets its own audit line. The portal tells you which systems went when you save, and refreshes Equipment & cover.

It does not work in reverse. Reactivating a contract does not put systems back on maintenance — that wants a person, because the visit dates need setting.

6.2 Run Extract — creating the month's jobs

Go to EM8 Core → Auto Schedule. The screen has two tabs in the order the work actually happens: 1. Run Extract, then 2. Auto Schedule.

1. Open tab 1. It lands on the right month by itself — the current month if it has not been extracted, otherwise the next one that has not.
2. Click Check month. This is a preview. Nothing is created.
3. Read the three figures: To create, Already raised, Skipped.
4. Look down the list. Every contract due this month is there with its customer, site, postcode, contract and service engineer.
5. Click Print the sheet if you want the paper list to work from (see 6.3).
6. Click Run Extract and confirm. Only admins can do this.
7. The jobs now exist. Move on to planning them — by hand in the Diary, or in tab 2.

What the extract actually creates

- One job per contract due this month, unassigned, dated the 1st of the month as a placeholder. That date is a holding position, not a promise — planning decides the real day.
- The job is filed under your maintenance call type, so your reporting stays clean.
- The job is marked as covered by the contract, so when it is completed it arrives on the billing list as PRE-CHARGED (Section 8.1). Parts used on the day are added as charges and bill normally.
- The job is linked back to the contract, so you can see every visit ever done under it.

Safe to press twice. If you run January on the 1st and again on the 28th, the second run reports what was already raised rather than creating a second set. It checks the jobs themselves, not just its own record, so a maintenance job you raised by hand also counts.

6.3 The extract sheet

Print the sheet gives you a landscape PDF on your own letterhead: every visit due this month, grouped by customer, with the job number, site, postcode, contract and engineer — and two deliberately blank columns, Planned and Done, to write on.

At the back is a second list: the contracts that produced nothing, and why. If that page is long, it is the most useful thing in the document.

Printing never creates anything. The sheet is generated from a preview, so you can print it, take it to a meeting and decide afterwards whether to run the extract at all.

6.4 Contracts that produced nothing

Both the screen and the sheet list active contracts that could not generate a visit, with the reason. The usual causes:

- No visits per year set at all, and no visit months either — nothing to work from. A contract deliberately set to 0 visits does not appear here.
- The site is not attached to a customer, so there is nobody to raise the job against.
- The contract has passed its end date.

Fix the contract on the site record, then click Check month again.

6.5 Auto Schedule — planning the month

Tab 2 takes the jobs the extract created and routes them to the engineer who looks after each site, into the diary.

Before the first run

1. Settings → Engineers: set a Home Postcode on every engineer who should be scheduled. Without one they are left out entirely.
2. Check the readiness panel on the Auto Schedule tab is green. It tells you what is missing.
3. If some sites are missing a location, use Locate sites from postcodes to fill them in. Sites you save from now on are located as you save them.

Running it

1. Build the plan. Nothing is committed yet — you get a proposed schedule to look at.
2. Read the unplaced list. Anything that could not be placed says why, usually a missing postcode or no engineer for that site.
3. Commit the plan when you are happy. The jobs are assigned, the diary fills in, and the engineers are notified.

You are never forced to use it. Auto Schedule is a convenience for the monthly bulk. Anything it proposes can be dragged somewhere else in the Diary afterwards, and any job can be planned entirely by hand.

7. Quotes

7.1 Building a full quote

1. Go to the Quotes tab and click New Quote.
2. Select the Customer and Site.
3. Give the quote a Job Title describing the work.
4. Set Valid Until — quotes past this date show as Expired. If the quote came from an enquiry, pick it under Raised from enquiry beside Valid Until. That link is what ties the quote back to the pipeline and tells the system who to notify when it is accepted.
5. Choose the Quote type: Works for a one-off installation, repair or supply; Maintenance for a service contract; Monitoring for a standing charge that buys no visit (ARC monitoring, a router rental); Mixed for an install with ongoing cover on one document. A contract type opens the Contract terms card — see below.
6. Add lines. Pick from product on each line searches Stock & Products and fills in the description, unit price and VAT rate for you — the quantity is left as you typed it. Or type a line in freehand.
7. Check the Net, VAT and Total figures at the foot of the quote.
8. Save as Draft while you work on it.
9. When you send it to the customer, click Mark Sent so the status changes from Draft to Sent.
10. When the customer replies, click Approve or Decline.

An approved quote can be turned into a job, carrying the lines across as charges so you do not retype them.

Contract terms on a maintenance or monitoring quote

When the Quote type is Maintenance, Monitoring or Mixed, a Contract terms card appears under the lines. These are the terms the customer agrees to when they accept, so they are captured on the quote rather than reconstructed afterwards from the line descriptions:

- Visits per year — 0 is allowed, for monitoring and standing charges that buy no visit.
- Visit months — pick the months if the visits are not evenly spread; leave blank to spread them.
- Invoice frequency — annually, half-yearly, quarterly or monthly.
- Annual value — defaults to the quote's net total unless you say otherwise (on a Mixed quote, enter the recurring part on its own).
- Start date and Term in months, which together set the contract end date.
- Discipline and Notes.

Nothing is required to save the quote — a quote is often written before the visit months are settled. Anything that is wrong, though — thirteen visit months, a frequency that is not annual, half-yearly, quarterly or monthly — is refused, because a bad value here becomes a bad contract once it is accepted.

Acceptance never creates a live contract on its own. When a contract-type quote is accepted, the terms become a draft contract that the office approves before it goes live. A customer's click puts something in front of you; it does not start billing them.

Emailing the quote to the customer

Click Email to Customer on the quote, or the envelope on the quote list. The recipient is filled in from the customer record, and you can add more addresses separated by commas.

Set your own subject and write a covering message — the quote PDF is attached automatically, so the message is yours to use for context, terms or a nudge about timing. Tick to copy yourself in if you want the thread in your own inbox.

Who it appears to come from: The email is sent by EM8 on your behalf and shows your company name, with replies going to your own address. That is what keeps it out of the customer's spam folder — mail claiming to come straight from your domain but sent from elsewhere is what gets filtered.

Quote status	Means
Draft	Being written. Not yet with the customer.
Sent	With the customer, awaiting a decision.
Approved	Accepted — go ahead and raise the job.
Declined	Turned down. Kept for your conversion reporting.
Expired	Past its Valid Until date with no answer.
Converted	Turned into a job.

7.2 Quick Quote — quoting on site

Quick Quote is for the moment an engineer spots extra work while they are already there. It is designed to be done on a phone in under a minute.

1. From the open job, tap Quick Quote.
2. Add the parts needed and the Labour hours.
3. The Net, VAT and Total to pay calculate as you go.
4. Add Notes for the customer explaining the work.
5. Show the customer the screen and have them sign in the Customer signature box.
6. If they say no, tap Customer declined — it is still recorded, which is useful evidence if the fault comes back.

The signed quote attaches to the job and is visible to the office immediately.

8. Billing and invoices

Billing has two tabs, because there are two kinds of money to raise and they are different decisions. Jobs to Invoice is work done, billed after the fact. Maintenance Invoices is contract money, billed on a cycle whether or not a visit has happened yet.

8.1 The Jobs to Invoice worklist

A single list of every job that is finished and waiting to be invoiced. For each one it shows the job number, customer and site, engineer, completion date, the customer reference and PO reference, and the value.

It also totals the value visible on the page, so you can see at a glance how much revenue is sitting uninvoiced. Work down the list, raise each invoice, and mark the job Invoiced.

Jobs that are already paid for

A maintenance contract is billed in advance. When the planned visit is done there is nothing left to invoice — but the job still arrives on this list looking exactly like a chargeable one.

Those jobs now carry a green PRE-CHARGED tag, and the button on them is Pre-charged — close rather than Create Invoice. Clicking it closes the job with no invoice, and records the covering contract as the reason.

A job is treated as pre-charged only when both things are true: the system it was done on is under a live contract, and the work is planned maintenance. A fault call on a contracted site keeps its Create Invoice button, because parts and out-of-hours on a reactive visit are still chargeable.

Invoice anyway is still there, behind a second confirmation, for the visit that turned into chargeable work while the engineer was on site.

Why this is worth having: Getting it wrong one way invoices the customer twice for the same visit. Getting it wrong the other way leaves the job on the list for ever, because nobody wants to be the one who invoiced it. The screen now knows, so nobody has to remember.

Closing a job without charging

Every completed job comes to this list — there is no longer a way to close one from the job page. Beside Create Invoice is Close without charge. It asks for a reason (warranty revisit, goodwill, covered by a call-out contract, internal), closes the job with no invoice, and puts the reason on the job's record.

Putting it here rather than on the job is deliberate. The person closing it can see the charges on the job and whether a contract covers it, which is what the decision depends on.

8.2 Raising an invoice

1. From the Billing tab, open the job and raise the invoice — or go to Invoices and click New Invoice.
2. Select the Customer and Site.
3. Set the Invoice Date and Due Date.
4. Enter the Customer PO Ref if there is one.
5. Check the lines pulled through from the job's charges and adjust if needed.
6. Add Notes if the customer needs an explanation on the invoice.
7. Save, then issue it. Without Xero the button is Mark Sent. With Xero linked it reads Finalise, or Finalise & send to Xero if auto-send is on (Section 2.7).

What the invoice shows

Each line shows the description, quantity, unit price and net amount. VAT is not worked out line by line — the Net Total, VAT and Gross Total sit at the bottom, which is how most customers expect to read an invoice. Whether VAT is added at all comes from the VAT number on your Company Profile (Section 2.1).

If Xero is connected (Section 2.7), finalising the invoice either sends it to Xero straight away or leaves it ready for Send to Xero..., depending on the auto-send switch. The invoice page and the Invoices list both show its Xero status.

Job sheets go out here too: If the customer is set to Auto-send completed job sheet, the job sheet was emailed to them when the job was sent to billing — before it reached this list. Nothing extra to remember here, and it is not sent again when you invoice it.

8.3 Tracking what you are owed

The Invoices tab lists every invoice with its number, date, due date, customer, site, total, outstanding balance and status. Use Show Overdue to filter to just the problems.

Invoice status	Means
Draft	Not yet issued.
Sent	Issued to the customer, not yet paid.
Paid	Settled in full.
Overdue	Past its due date and still outstanding.
Cancelled	Voided.

With Xero connected, the list also has a Xero column — In Xero, Not sent or Error — and a Send to Xero... button. That opens every finalised invoice not yet in Xero, all ticked; untick any and click Send. Invoices go one at a time, so one failure does not hold up the rest, and failures are queued for retry.

Paid arrives on its own. A payment applied to the invoice in Xero is recorded here with its date, amount and reference — usually within moments, within fifteen minutes at most — so the ledger on this tab and the one in Xero say the same thing without anyone marking invoices paid by hand. A payment you record here against an invoice not yet sent to Xero waits, and goes across with the invoice.

For chasing: Reports → Top Outstanding Balances gives you the customers who owe the most and the oldest amount due against each. It is the fastest way to prioritise a credit control call.

8.4 The maintenance invoice run

The second Billing tab raises the month's contract invoices in one pass.

1. Open Billing → Maintenance Invoices. It suggests the right month by itself.
2. Click Check month. Every contract due to be invoiced comes back with its value and a running total.
3. Rows arrive ticked. Untick the exceptions — a customer in dispute, a site that closed last week. The total updates as you go.
4. Click Raise invoices. Only the ticked rows are raised.
5. The invoices are created as drafts. Review them, then send each one as normal.

Three things worth knowing

- The value is the annual value divided by the invoice frequency. £6,000 a year billed quarterly is £1,500 a time.
- Billing follows the contract's cycle, not the visits. A visit that slipped to next month does not hold up this month's invoice — the customer is paying for cover, not for the day out.
- Running it twice is safe. Contracts already billed for the month come back as already raised rather than being billed again.

Why drafts and not sent: An invoice run that fires unattended and gets something wrong reaches the customer before anyone here knows. Unwinding that costs far more than the minute it takes to look down a list. Sending stays a deliberate act.

9. Stock, products and purchasing

9.1 Suppliers

1. Go to Stock & Products → Suppliers and click New Supplier.
2. Enter the Supplier Name, your Account Number with them, contact name, phone and email.
3. Add their address and any notes about lead times or delivery arrangements.

9.2 Products

1. Click New Product.
2. Enter the Product Name and SKU.
3. Set the Cost Price (what you pay), the Unit Price (what you charge) and the VAT Rate.
4. Choose the Supplier.
5. Enter your Opening Stock and a Reorder Level.
6. Save.

The product list shows current stock against reorder level, so anything running low stands out. Products appear in the dropdown whenever an engineer or the office adds a charge to a job, which keeps your pricing consistent.

9.3 Purchase orders

1. Go to the Purchasing tab and click New PO.
2. Choose the Supplier and set the Order Date and Expected Date.
3. Click Add Line for each item — description, quantity and cost. Net and gross totals calculate automatically.
4. Click Create PO. It saves as Draft.
5. When you place the order with the supplier, move it to Ordered.
6. When the goods turn up, open the PO and click Record Goods Received, entering the quantities that actually arrived.

Recording goods received updates your stock levels and moves the PO to Part Received or Received depending on what arrived. Nothing has to be typed twice.

PO status	Means
Draft	Being prepared, not yet placed.
Ordered	Placed with the supplier.
Part Received	Some lines delivered, some outstanding.
Received	Fully delivered.
Cancelled	Order withdrawn.

10. Hours and timesheets

Every time an engineer presses "On my way", "Arrived on site" and "Complete", EM8 Core records it. The Hours tab turns those presses into a timesheet without anyone filling in a form.

10.1 Reading the timesheet

Choose an engineer and a Period. You get, per day and per job: the date, customer and site, job number and type, arrival and departure times, travel time, total on site, and whether the work was billable. Days, visits and total hours are summed for you.

10.2 Fixing a bad entry

People forget to press buttons. The Hours tab flags the two common problems — a visit that was auto-closed because it was left running, and a job where the clock was never stopped at all.

1. Find the flagged entry and click Fix.
2. Enter the correct Arrived on site and Left site times.
3. Enter a Reason for the correction.
4. Save. The correction is logged, so the audit trail stays honest.

10.3 Exporting for payroll

Click Export Daily to download a spreadsheet of hours for the selected engineer and period, ready to hand to whoever runs your payroll.

Habit to build: Ask engineers to press "Arrived on site" as they walk in, not when they remember at the end of the day. It costs them two seconds and it is the difference between an hours export you can trust and one you have to correct.

11. Enquiries, surveys, messages and calls

11.1 Enquiries

Enquiries are sales opportunities before they become quotes or jobs. Record the Reference, Customer, Description, Source (how they found you), Estimated Value and Status, plus any Notes, and assign it to the salesperson handling it. It gives you a simple pipeline without a separate CRM.

What an enquiry holds

- Files — drawings, the customer's spec, photos from the site visit. Click Upload or drag files straight onto the panel. Click a file to preview it in place, the same as the site cabinet, or download it.
- Quotes — every quote raised against the enquiry. A quote is linked from the quote itself under Raised from enquiry (Section 7.1), so a first price, a revision and a cut-down option all show here.
- Assigned to — the salesperson. This is who is told when a quote for the enquiry is accepted; with nobody assigned, everyone in the office is told instead.
- Survey — whether a survey is needed, who is doing it and when it is booked for. See Section 11.2.

11.2 Surveys

A survey is the longer form somebody fills in on site before a quote goes out — the Fire Survey & Design Report, for example. It is booked from the enquiry and carried out in the app, because a survey is a visit like any other.

Booking one

1. Open the enquiry and go to the Survey tab.
2. Turn on Survey required, choose the Surveyor, set Booked for, and add any survey notes — what to look at, who to ask for, anything they need before they go.
3. Click Save Survey.

That raises a Site Survey job for the surveyor, dated for the day you booked, with the survey form attached to it as a mandatory form. They are notified the same way they are for any job and it appears in their list in the app.

Changing the date or the surveyor and saving again re-books the same job rather than raising another. Once the survey has been done the job is left alone.

Carrying it out

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 — a survey is routinely started on site and finished later. Submitting the form completes the survey job and moves the enquiry to Surveyed.

The enquiry's Survey tab then shows the job, its status and the submitted form, with View survey form to read the answers without leaving the enquiry. Every completed survey is also listed on Sales → Surveys with its reference, customer, site, and the enquiry and job it came from, and can be viewed or printed at any time.

What it needs

- The surveyor must be an active engineer profile linked to a login (Section 2.5). Sales staff who survey need one the same as engineers do, and they count as an app user.
- The survey form must be active in Settings → Forms. EM8 supplies the Fire Survey & Design Report as a default — adopt it to get your own editable copy (Section 2.6).
- 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. An existing site at the same address is reused rather than duplicated.

Survey jobs are never chargeable: They are raised non-billable. A survey is sales work, so it does not arrive on the billing list looking like a visit somebody should invoice.

11.3 Messages

Internal messaging between office and engineers. Click New, choose who it goes To, add a Subject and Message, and optionally Link to Job so the conversation stays attached to the work it is about. Replies thread underneath.

11.4 Calls

If your phone system is connected, incoming calls pop up on screen with the caller's number and, where it matches, the customer. You can log the call there and then or Ignore the pop-up.

The Call Log lists every call with its direction, number, customer, duration, outcome and notes. Calls that could not be matched to a customer show as Unlinked so you can attach them manually.

Who gets the pop-up. The pop-up only appears for people who have a phone extension linked to their EM8 login. That link is the on/off switch: someone who should not be interrupted by call pop-ups simply has no extension against their account, and the call log is still there for everyone.

12. Reports and the Audit Log

Both are admin-only.

12.1 Reports

- Jobs by Engineer — volume per engineer over the period. Useful for workload balance, not just performance.
- Jobs by Type — where your work actually comes from: reactive, planned, installation, remedial.
- Revenue — invoiced value over the period.
- Top Outstanding Balances — who owes you, how much, and the oldest amount due.

12.2 Audit Log

A record of who changed what and when across EM8 Core. Use it to answer "who cancelled that job?" or "when did this price change?" without guesswork. It is also the evidence trail an auditor or a certification body will ask for.

12.3 Custom Reports

Custom Reports sits next to Reports and answers a different kind of question. Reports tell you how much and how many. Custom Reports tell you what is wrong and where.

Pick a question from the list on the left. The answer appears on the right immediately — sortable by any column, with a search box for finding a customer or site inside the result. Export PDF gives you exactly what is on screen, with the same filters applied, landscape on your own letterhead.

The reports

Group	Answers
Maintenance	Sites overdue their maintenance, with days overdue. Maintenance due in the next so many days. Systems under maintenance that have never been serviced.
Charges vs schedules	Charges with no maintenance schedule — the customer is billed for visits nothing will raise. Schedules with no charge — visits will be raised that nobody is paying for. Active contracts with no visit frequency. Cancelled contracts with systems still under maintenance.
Contracts	Contracts expiring in the next so many days. Annual contract value by customer, largest first.
Jobs	Jobs open longer than so many days. Open jobs with no engineer. Completed jobs not yet billed.
Customers	Customers on credit hold who still have open jobs or live contracts.
Data quality	Systems with no discipline. Contracts with no discipline. Sites with no systems recorded. Customers with no email or phone.

Several reports take a filter — a discipline, or a number of days. Change it and click Run. The PDF follows whatever the filters currently say, so the document and the screen can never disagree.

The two that matter most

Charges with no schedule and Schedules with no charge are the same problem seen from each end, and between them they are where contract money quietly goes wrong.

- A charge with no schedule is revenue with no work behind it. The customer is paying, nobody is going, and the first anyone hears is usually when the customer asks why nobody has been for two years.
- A schedule with no charge is work with no revenue behind it. Visits are being raised, engineers are attending, and no contract covers any of it.

These two need the disciplines filled in. Both reports match a contract to a system by discipline

where the system is not tied directly to its contract. Until the disciplines are set, they over-report. The two data quality reports — systems with no discipline, contracts with no discipline — are how you clear that, and both lists shrink as you do.

Nothing here changes anything. Every custom report is read-only. Running one, filtering it, exporting it — none of it writes to a record. Print them, take them to a meeting, hand them round.

13. The EM8 HQ app

EM8 HQ is the Engineer M8 app for iPhone and Android. For an engineer it is the whole of EM8 Core: the day's list, the job, the clock, the forms, the photos and the sign-off. The office does not need it — everything in the earlier sections is the portal in a browser — but everything an engineer does in Section 4 happens here. The app also carries the other EM8 products your company uses (Surveillance Guardian, FireLog, Tracking Guardian). This section covers the EM8 Core part.

13.1 Installing and signing in

1. Install EM8 HQ from the App Store or Google Play.
2. Sign in with the same email address and password as the portal.
3. Turn on Face ID, Touch ID or fingerprint when asked. The app locks itself when it goes into the background and unlocks with that — so a phone left on the van seat is not an open job list.
4. Allow notifications, so you are told when a job is assigned to you or moved. Allow location, so the clock can record where you pressed Arrived.

The app keeps you signed in. A poor signal does not sign you out — only a login that is actually rejected does — and when the app locks, whatever you were in the middle of is still there when you unlock it.

If you cannot see any jobs: your engineer profile is not linked to your login. The office fixes that on Settings → Engineers (Section 2.5). If your access has just been changed, sign out and back in — access is set when you sign in, so a change made while you are logged in does not reach you until you do.

13.2 Today and Jobs

Open EM8 Core from the app's home screen. It has two views:

- Today — a My diary today card with everything booked for you today in the office diary, including the second day of a multi-day job, followed by your open jobs.
- Jobs — every open job assigned to you.

A job with the clock running shows a badge — On my way 12m, On site 43m — and sits at the top of the list. Pull down to refresh. Tap a job to open it.

The bell shows your notifications: assigned, unassigned, moved, and your monthly route when the office issues it.

13.3 Logging a job from the app

1. Tap the orange New job button.
2. Choose the Customer, then the Site.
3. Choose the Job type and set the Priority.
4. Describe the fault or the work.
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 is saved.
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 who collars you on site for something extra, or the call that comes in when the office is closed. Not for maintenance visits — those are raised for the whole month by Run Extract (Section 6).

13.4 What is on a job

Card	What it is for
Details	Job number, type, priority, the fault description, the site address and the site alert. Tap the address for directions.
Time	On my way, Arrived on site, Complete — and the live figure for the visit you are on. Section 13.5.
Forms	The checklists and certificates that belong on this job, with mandatory ones marked. Section 13.6.
Photos	Take a photo or pick one from the phone. Each uploads to the job as it is taken.
Notes	Anything the office needs to know. Notes go to the job, not on the job sheet.
Activity	The job's history — who did what and when, including your own presses.
Charges	What is on the job so far. Engineers read this; they do not add to it. Parts priced on site go through Quick Quote, and the office adds the rest.
Installed Kit	What is recorded at the site — panels, cameras, systems — including anything read across from Surveillance Guardian or FireLog.
Quick Quote	Price extra work there and then and have the customer sign for it. Section 7.2.
Log work	A note on the activity trail. It is not a time entry — the clock does the timing, so do not enter your hours twice.

13.5 The clock

1. As you set off, press On my way. Travel time starts.
2. As you walk in, press Arrived on site. The on-site clock starts, the job goes In Progress, and the office's response time is recorded as met.
3. When you have finished, press Complete (Section 13.7). The clock stops as the job completes.

Several jobs at the same site

If you have more than one job at the site you are heading to, the time card shows Also for my N other jobs at this site, ticked. One press of On my way or Arrived then applies to all of them, and each job's clock runs on its own from there. Complete is still per job.

One clock at a time

Pressing Arrived at a job on a different site closes whatever you had open, so a forgotten Complete does not run all night. A visit that runs past twelve hours is closed automatically and flagged for the office to check.

Coming back tomorrow? Use Left site — return needed rather than Complete. The job stays open, the clock stops, and a new visit is recorded when you return, so both trips are on the timesheet. Put the reason in Notes.

13.6 Forms and photos

The Forms card lists the forms that belong on this job — decided by the job type and the systems at the site, so you only see the ones that apply. Mandatory ones are marked.

1. Open the form. Required questions are marked; the form will not submit with one blank.
2. Answer as you go. Save draft keeps it on the phone; Submit sends it to the job.
3. Photos are taken inside the form where a question asks for one, or from the job's Photos card.

Drafts are kept on the phone for twelve hours. Taking a photo, answering a call, or the app locking does not lose them — when you come back, an amber notice says the draft was restored and you carry on where you were.

What happens to a submitted form

It is carried onto the job. Work carried out and Parts used become the job's Action Taken; Defects and Recommendations become the job's Recommendations; the form's photos become the job's photos; a Next service due answer moves the system's next service date. You do not type any of it again at Complete, and the job sheet prints it once. A survey job booked from an enquiry arrives the same way, with the survey form on it — submitting that form is what completes the survey (Section 11.2).

Forms do not ask for a signature. The sign-off you take at Complete is copied onto every form on the job.

13.7 Completing a job

Complete is one screen:

- Work carried out — what you found, what you did, what is outstanding. If a form already said it, it is here already.
- Recommendations.
- Your signature — required.
- Customer sign-off — optional, with the name of the person signing.

Tap Complete. The clock stops, the job goes to Complete for the office to check, and if it was a maintenance visit the system's next service date moves on by itself.

Complete is greyed out. A mandatory form on the job has not been submitted. The red notice names it. Submit the form and Complete unlocks — a job cannot be completed with a mandatory checklist left blank, and the office cannot override that.

Only the assigned engineer can complete a job. If the button is not there at all, the job is on someone else — ring the office.

13.8 Also in the app

- Vehicle checks — the daily walkaround, with photos. The app checks you are in the vehicle you say you are in, and keeps a draft for six hours so a photo or a phone call does not lose it. Every engineer sees this whether or not they use the rest of Tracking Guardian.
- Incident report — a crash or damage report from the phone, with photos, from the Engineer tab.
- FireLog and Surveillance Guardian — site inspections and camera health, if your company uses them.

13.9 If something goes wrong

Problem	What it usually is
A screen says Failed	You do not have permission for that screen — Quotes, for instance, is office and management only. Nothing is broken; use the screens that are yours.
The form came back empty	Check for the amber Draft restored notice at the top — the answers are usually there. If not, the draft is older than twelve hours.
A button is hidden under the phone's own buttons	Update the app. The Submit and Complete buttons were moved clear of the navigation bar in the September release.
The app asked for Face ID in the middle of a job	That is the lock, not a sign-out. Unlock and you are back where you were.
I cannot see a job the office says is mine	Pull down to refresh. If it is still missing, the assignment is on somebody else — check with the office.
Travel shows 0m	It counts once you press Arrived. Pressing On my way and never Arrived leaves nothing to measure.

14. Quick reference

14.1 A reactive job from start to finish

Step	Who	Where
Customer calls with a fault	Office	Jobs → New Job
Schedule it	Office	Diary — drag onto an engineer
Engineer sets off	Engineer	Job → On my way
Engineer arrives	Engineer	Job → Arrived on site
Checklist / certificate	Engineer	Job → Forms (mandatory ones before Complete)
Parts and labour	Engineer	Form → Parts used; priced on site by Quick Quote, or by the office on Charges
Extra work spotted	Engineer	Job → Quick Quote → customer signs
Work finished	Engineer	Job → Complete → sign
Checked and approved	Office	Job → Approve
Ready to invoice	Office	Job → Send to Billing
Invoice raised	Office	Billing → Invoices
Hours to payroll	Office	Hours → Export Daily

14.2 The monthly maintenance routine

Step	Who	Where
Preview what is due	Anyone	Auto Schedule → 1. Run Extract → Check month
Print the working sheet	Anyone	Run Extract → Print the sheet
Create the month's jobs	Admin	Run Extract → Run Extract
Fix the contracts that produced nothing	Admin	Site → Maintenance Contracts
Plan the work	Office	Diary, or Auto Schedule → 2
Engineers are notified	—	Automatic on assignment
Raise the contract invoices	Admin	Billing → Maintenance Invoices
Send the invoices	Accounts	Invoices

14.3 Priorities

Priority	Typical use
Urgent	Life safety system down, total loss of service, contractual emergency response.
High	Significant fault, system impaired, customer under pressure.
Normal	Standard reactive work and planned maintenance.
Low	Cosmetic, non-urgent, do-it-when-passing.

14.4 Glossary

Term	Meaning
Asset	A piece of equipment recorded against a site — a panel, camera, pump, detector.
Billable	Whether a job is charged. Decided on the Billing list — Create Invoice, Pre-charged close or Close without charge — rather than by a switch on the job.
Call type	Your category of work. Drives priority, billing default, forms and SLA.
Charge	A part or labour line added to a job, which becomes an invoice line.
Engineer seat	A licensed engineer profile. Your package includes a set number.
Extract	The monthly run that turns contracts due this month into real jobs.
Form	A checklist, certificate or survey completed on site.
Invoice frequency	How many times a year a contract is invoiced. Divides the annual value.
PO reference	The customer's purchase order number. Carries from job to invoice.
Placeholder date	The 1st of the month, given to newly extracted jobs until they are planned.
SLA	Your promised response and fix times. Set in Settings → Response Times.
Site	A physical premises belonging to a customer. Jobs are logged against sites.
Visit months	The specific months a contract is serviced, for contracts that are not evenly spread.
Worksheet / job sheet	The printable record of a job — what was found, done and charged.
Schedule alert	A message saying an engineer is not at the job the diary booked him on to, worked out by comparing the diary with his vehicle's tracker. Switched on per company in Settings → Alerts.
Grace period	How late is late — the minutes after a job's booked time before a schedule alert is considered.
Certificate	The document issued from a completed job saying a system was inspected or commissioned, against a named standard. Filed against the site.
Discipline	The trade a system, contract or job belongs to — Fire Alarm, CCTV, Intruder Alarm, Sprinkler, AOV and so on. Drives forms, certificates, SLA targets and every report that groups by trade.
Pre-charged	A planned maintenance job already paid for under a live contract. Closed rather than invoiced.
Custom report	A ready-made question in Reports → Custom Reports, answered on screen and exportable as a PDF.

15. Common questions

An engineer cannot see any jobs.

Their engineer profile is probably not linked to their login. Go to Settings → Engineers, open the profile and check the Portal User ID is filled in and Status is Active.

An engineer has EM8 Core but cannot see Field Service Jobs in the app.

Ask them to sign out of the EM8 HQ app and back in. Access is set when they sign in, so a permissions change does not reach them until they do.

A job will not let the assigned engineer complete it.

Only the assigned engineer can complete a job. Check the assignment is on the right person — or reassign it.

Someone forgot to press "Arrived on site".

Add the visit manually from the job's time panel, or use Fix on the Hours tab. Either way, record the reason.

A job is finished but should not be invoiced.

Send it to Billing as normal, then use Close without charge on the Billing list and give the reason. It closes the job without creating an invoice and keeps the explanation on the record.

Run Extract created nothing for a site I know is due.

Look at the skipped list on the same screen. Almost always the contract has no visits per year and no visit months, so there is no pattern to work from. Fix it on the site record and click Check month again.

I clicked Run Extract twice by mistake.

Nothing has gone wrong. Anything already raised for that month is reported as already raised, not duplicated — including maintenance jobs you created by hand.

A maintenance job has no charge on it. Is that right?

Yes. The visit is already paid for under the contract, and the contract is invoiced separately in Billing → Maintenance Invoices. Parts you use on the day are added as charges and bill normally.

The maintenance invoice run raised drafts, not sent invoices.

That is deliberate. Review each one and send it as normal. A run that sends unattended and gets something wrong reaches the customer before anyone here knows.

Auto Schedule left several jobs unplaced.

The unplaced list gives the reason against each. The two usual ones are a site with no postcode and an engineer with no home postcode. Fix those and build the plan again.

A page shows an error after an update.

Click Refresh Page. This almost always follows a new release and clears once the browser picks up the new version.

A tab is missing from my screen.

Reports, Audit Log and Settings are admin-only, and so is running the extract and the invoice run. If you need them, ask your administrator to change your role.

We need more engineer seats.

The Engineers page shows your current usage. Contact Engineer M8 to add more.

The customer says they never got the job sheet.

Open the job, Details tab, Job sheet emails. A failed row gives the reason — usually no email address on the record, or the address was rejected. No row at all means that customer does not have Auto-send completed job sheet ticked, so nothing was ever sent automatically. Either way, click Email job sheet to send it now.

Should the job sheet go out when the engineer finishes?

No, and it does not. It goes when you send the job to billing, which is the point at which somebody has read the write-up and is standing behind it. Sending at completion would mean routinely emailing out a sheet that is then corrected, and the correction is a phone call.

Late-job alerts are firing for engineers who are on site.

Their van is parked further from the site than the radius allows — a large industrial estate or a car park round the back will do it. Raise Counts as on site within in Settings → Alerts. If the alerts instead say No vehicle assigned, the fleet record does not say which van that engineer is in; fix that in Tracking Guardian and the alerts start working.

A contract is monitoring only. What do I put for visits per year?

Put 0. It means somebody has decided no visit is due, so the contract stops appearing on the extract's problem list. Leaving it blank means nobody has said yet, which is a different thing and is meant to be chased.

A job on the billing list says PRE-CHARGED. What do I do with it?

Click Pre-charged — close. The visit is already covered by the contract, which is invoiced separately in Billing → Maintenance Invoices. Only use Invoice anyway if extra chargeable work was done on the same visit.

The call pop-up has stopped appearing.

Pop-ups only go to people with a phone extension linked to their EM8 login. Ask your administrator to check the extension is on your account.

A certificate has gone out with a mistake on it.

Void it with a reason and issue a replacement from the same job. Issued certificates are never edited in place — the voided one stays on the record, which is what keeps the trail defensible.

How do I find every site that is overdue a service?

Reports → Custom Reports → Sites overdue their maintenance. It lists the system, the date it was due and how many days it has slipped, and exports as a PDF you can work from.

A report shows sites I know are covered.

The charges-versus-schedules reports match a contract to a system by discipline. If either the contract or the system has no discipline set, they cannot be matched and the site shows as a gap. Run the two data quality reports and fill those in — the false entries disappear as you go.

The engineer cannot press Complete.

A mandatory form on the job is still unsubmitted — the app shows a red notice naming it. Once the form is submitted, Complete unlocks. If no form is outstanding, the job is on another engineer.

The app lost the engineer's form answers.

Ask them to look for the amber Draft restored notice at the top of the form. Drafts survive photos, calls and the app locking for twelve hours. If the app is old enough to lose them, it needs updating from the store.

Where has the Status dropdown gone?

It was removed. Hold, Resume, Mark In Progress, Cancel and Re-open are buttons on the job header, and the closing states — Complete, Pending Invoice, Invoiced, Closed — each have one button that reaches them (Section 4.1). Nothing can be closed by editing a field any more.

Where has the Billable switch gone?

It was removed with the status dropdown. Every completed job goes to the Billing list, and the decision — Create Invoice, Pre-charged close, Close without charge — is made there with the charges in view.

The diary will not let me book an engineer on a Friday.

Friday is not one of their working days. Settings → Engineers → Edit → Working days. If they do work Fridays, tick it and the diary picks it up on its next load.

A job needs two days.

Assign it with the total hours and it is booked as one visit per working day. To choose the days yourself, use the Visits card on the job's Details tab (Section 4.3).

Invoices are coming out without VAT.

Check Settings → Company Profile has your VAT number in it. Without one, invoices are raised without VAT.

An invoice has not appeared in Xero.

Xero only sees invoices you have marked Sent — a draft stays here. If it is Sent and still missing, look at Settings → Xero: the Sync switch may be off, or the page may say Xero needs reconnecting. The queue sends it once the link is back.

A customer paid in Xero but the invoice still says Sent here.

Payments are picked up every fifteen minutes, so give it that long. After that, check the payment in Xero is against the right invoice — the one whose reference matches the invoice number here.

How do I change my password?

Your name at the top right → Profile → Change password.

I cancelled a contract and the systems went off maintenance.

That is what cancelling does — the systems the contract was paying for are stood down, unless another live contract on the site covers them. Reactivating the contract does not put them back; edit each system and tick Maintained, then set the visit dates.

Need help?

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

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