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 1.9

Engineer M8 · em8portal.com

What has changed in version 1.9

Version 1.9 adds the features released in November: a defect register and site compliance scores, a new Quality tab, safety questions before work starts, more certificate types, automatic follow-ups and chasing, customer feedback, labour rates and profitability, purchase orders and deposits on jobs, device lists on forms, and Plan Guardian links. It also corrects Section 16: FireLog is now a separate paid product. Updated 18 November 2026.

What changed	Where to read it
FireLog is a separate paid product. Without it the fire-safety equipment screens are hidden.	Section 16
Defect register, false alarms and a compliance score for every site. Engineers can sign defects off.	Section 19
New Quality tab: complaints, test equipment calibration and audit KPIs.	Section 20
Safety questions before engineers start work.	Section 21
Design, commissioning, acceptance and verification certificates, client sign-off, accreditation, forms as certificates.	Section 22
Follow-ups when a job is finished, quote chasing, service-due emails and customer feedback.	Section 23
Labour rates and customer prices, labour costs and the Profitability report.	Section 24
Purchase orders linked to jobs, and deposit invoices when a quote becomes a job.	Section 25
Device lists on forms linked to the site's assets, and NFC tags for any device.	Section 26
Plan Guardian: quotes from a plan, plans on a job, zone chart and cause and effect.	Section 27
The tab table, Settings list and Common questions are brought up to date.	EM8 Core at a glance; Section 15

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 twelve tabs. Several tabs hold more than one screen.

Every feature, in one table

Tab	What it does
Dashboard	Your daily overview — open jobs, overdue maintenance, faults waiting, jobs awaiting a certificate, maintenance due this month, recent jobs and app user seats.
Customers	Four screens. Customers: contact details, credit terms, credit hold, job sheet delivery, labour rates and every site they own. Sites: every premises — Equipment & cover, Compliance, contacts, cabinet, alerts and jobs. Compliance: every site's score, worst first. Defects: the defect register.
Jobs	The heart of the system. Log faults and planned work, assign engineers, record time on site, add charges, complete and send to billing.
Diary	A calendar of scheduled work per engineer, by day or week. Drag jobs into slots and see who is free.
Auto Schedule	The monthly maintenance run. Tab 1, Run Extract, raises the month’s maintenance jobs. Tab 2, Auto Schedule, plans visits into routes. (Admin by default.)
Sales	Two screens. Enquiries: the sales pipeline, surveys and cost breakdowns. Quotes: build, email, get signed and convert.
Billing	Three screens. Invoices: the ledger. Jobs to Invoice: finished work waiting to be billed. Maintenance Invoices: the month’s contract invoices.
Stock & Purchasing	Three screens. Products & Stock, Suppliers and Purchase Orders.
Comms	Two screens. Messages between office and engineers, and Calls — the call log with screen-pop.
Reports	Seven screens. Hours, Reports, Custom Reports, Response & SLA, Feedback, Profitability and the Audit Log. Everyone sees Hours; the rest are admin by default, and engineers never see Profitability.
Quality	Four screens. Audit KPIs, Complaints, Test equipment and Safety checks. (Office and admin by default.)
Settings	Company Profile, Call Types, Branches, Response Times, App Users, Forms, Alerts, Labour Rates, Service Reminders, Safety questions, Labour costs, Xero and Customer feedback. (Admin by default.)

What EM8 Core also gives you

- Custom forms — build your own checklists and surveys, set which work they belong on, and have engineers fill them in on site with photos.
- SLA response times — set response and fix targets per customer, discipline or call type, see jobs flagged as at risk before you breach, and report on how you did.
- Maintenance driven by the systems themselves — every maintained system carries its own next service date, and the monthly run raises a job for everything that is due.
- 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. The office can correct any visit.
- 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.
- Quotes signed online — the customer reviews and signs from a link in the email, or signs on the engineer's phone on site.
- Access you control per person — every role has sensible defaults, and an admin can grant or remove each part of EM8 Core for a named person.
- Reports that answer a question — ready-made reports covering overdue maintenance, contracts billed with no visit behind them, response times and the data gaps behind them. Every one exports.
- 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.
- A defect register and compliance score for every site — see at a glance which sites are at risk and why.
- A Quality tab for your audits — complaints with response dates, test equipment calibration and the figures an auditor asks for.
- Safety questions before work starts — engineers confirm PPE, RAMS and permits, and the office hears about an unsafe answer at once.
- Follow-up that happens by itself — quotes chased, customers reminded when a service is due and asked how the job went.
- Profit per job and per contract — revenue against labour, parts and purchase orders, with any gaps called out.

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.

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4. The job lifecycle	Logging, assigning, on-site working, completing, billing, certificates
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10. Hours and timesheets	Time on site, correcting times, exports
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12. Reports and the Audit Log	Reports, custom reports, response & SLA, 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
16. Fire-safety equipment and inspections	FireLog devices, NFC tags, inspections, defects and verification
17. Customer online access	Enable access, site permissions, Compliance sharing, activation and revocation
18. Mobile inspections and offline working	Download, record, synchronise and confirm evidence
19. Defects, false alarms and compliance	The defect register, signing off, false alarms, compliance scores
20. Quality	Audit KPIs, complaints, test equipment and calibration
21. Safety questions	Asking engineers before work starts, and the safety check report
22. More certificates	New certificate types, client sign-off, accreditation, form records
23. Following up with customers	Follow-ups, quote chasing, service-due emails, customer feedback
24. Rates, costs and profitability	Labour rates, customer prices, labour costs, the Profitability report
25. Purchase orders and deposits	Purchase orders for a job, stock orders across jobs, deposit invoices
26. Device lists on forms	Linking form tables to the site's assets, NFC tags
27. Plan Guardian with EM8 Core	Quotes from a plan, linking devices, plans on a job, cause and effect

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

Every login has a role, and each role comes with a default set of EM8 Core features. An administrator can then add or remove individual features for a named person — see Per-person access below.

Roles provide defaults. Per-person Allow and Deny choices determine normal workflow access; protected administrator actions remain separate.

Role defaults are a starting point. Explicit per-person permissions can change normal workflow access; viewing a tab does not always grant permission to manage its records.

Role	Typically	What they can reach by default
Engineer	Field staff	Dashboard, Customers, Jobs, Diary, Sales and Stock (view only), Comms, and their own Hours. Normally works from the EM8 HQ app (Section 13). No invoices or billing.
Office	Coordinators, admin staff	Everything day-to-day: customers, sites, jobs, diary, enquiries, quotes, invoices, the billing worklists, stock, purchasing, messages, calls and everyone’s hours.
Admin / Super Admin	Managers, owners	All of the above plus Auto Schedule, Reports, Custom Reports, Response & SLA, the Audit Log and Settings. Recording payments, cancelling invoices and editing systems and contracts are admin only.

Per-person access

Defaults suit most people, but not everyone. An office manager may need Reports; a trainee may need Quotes taken away. Rather than changing someone’s role, switch individual features on or off for them.

1. Go to Users in the portal menu and open the person (Update User).

2. Open the **EM8 Core** tab. It only appears if your company has EM8 Core.
3. Choose Role default, Allow or Deny for each feature. Allow grants the normal workflow, including read and write actions; Role default inherits the role. Reset removes the override.
4. Save.

The feature list covers Dashboard, Jobs, Customers & Sites, Diary, Calls, Sales (Enquiries), Quotes, Invoices, Billing worklist, Stock & Products, Purchase Orders, Hours, Messages, Auto Schedule, Reports, Audit Log and Settings.

The editor distinguishes normal workflow permissions from shared reads used by other screens. Deny hides the feature and blocks its classified normal actions. Record deletion, finance controls, app-user administration and Xero connection management retain their separate restrictions.

> **A change takes up to 30 minutes to reach someone.** Their access travels with their login, which refreshes every half hour. If they need it now, ask them to sign out and back in. Super Admins cannot be restricted. Someone with every feature switched off sees a message saying who can grant them access.

1.3 Finding your way around

- Search boxes appear at the top of most lists. On Jobs you can search by job number, PO number, customer, site or fault text — so a customer ringing up quoting their PO number can be found on it.
- Filters sit next to the search box — status, job type, priority. They combine, so "Open + Urgent" 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, job or invoice inside a record jumps you to that record with it already open.
- Coloured tags tell you status at a glance.

The tab bar has eleven tabs, and six of them hold more than one screen:

- **Customers** holds Customers and Sites. A site only exists as part of a customer. The Sites list searches every site you have.
- **Sales** holds Enquiries and Quotes — the pipeline in the order it happens. Surveys are booked and read from the enquiry (Section 11.2).
- **Billing** holds Invoices, Jobs to Invoice and Maintenance Invoices.
- **Stock & Purchasing** holds Products & Stock, Suppliers and Purchase Orders.
- **Comms** holds Messages and Calls.
- **Reports** holds Hours, Reports, Custom Reports, Response & SLA and the Audit Log.

A tab you do not have access to is simply not shown (Section 1.2). Old links and bookmarks still work — a saved link to Quotes or Invoices opens the right sub-tab, and a link to a tab you cannot see opens your first available tab instead.

2. First-time setup (Settings)

Do this once, before you start logging jobs. Settings sits at the far right of the tab bar. It is admin-only by default, and can be granted to a named person (Section 1.2). Its screens are Company Profile, Call Types, Branches, Response Times, App Users, Forms, Alerts and Xero.

2.1 Company Profile

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

1. Go to Settings → Company Profile.
2. Fill in the fields directly — there is no separate Edit button — and click **Save Company Profile**.
3. Click **Upload Logo** (or **Change Logo**). The logo appears on your PDFs.

Document numbering

The same screen sets the prefix for each kind of document: Jobs (JOB), Quotes (QT), Invoices (INV), Enquiries (ENQ), Purchase orders (PO) and Certificates (CERT). A prefix is up to ten letters, digits or hyphens. Changing one only affects documents created afterwards — nothing already numbered is renumbered.

> **The VAT number is printed on your invoices.** VAT itself is charged line by line — each charge, product and invoice line carries its own VAT rate (20% unless you change it). If you are not VAT registered, set the rates to 0% on your products and charges, and turn off VAT registered in Settings → Xero if you use Xero (Section 2.7).

2.2 Branches / Offices

If you operate from more than one depot, add each one here with a short code, address and contact details, so your branch details are held in one place.

2.3 Call Types

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

- a **Name** (what staff see in the dropdown);
- a **Default Priority** (Low, Normal, High or Urgent);
- a **Billable by default** switch;
- an **Active** switch, so retired types disappear from dropdowns without deleting history.

> **Name your maintenance type "Planned Maintenance".** The name does real work. The monthly extract files its jobs under the first active type whose name contains PPM, Planned, Prevent or Maintenance. A completed visit is only treated as already paid for (PRE-CHARGED, Section 8.1) when its type name contains Planned or Preventative, or is exactly PPM. "Planned Maintenance" satisfies both. A type called just "Maintenance" gets the extract's jobs but never shows as PRE-CHARGED.

2.4 Response Times (SLA)

An SLA policy says how quickly you have promised to respond. Response SLAs are for corrective work — faults and call-outs — so planned maintenance types are not offered.

1. Go to Settings → Response Times and click **Add policy**.
2. Choose who it applies to: a **Customer**, a **Discipline** and/or a **Call type**, or leave them as "Any" for a default.
3. Set **Respond within** — pick a preset from 1 hour to 48 hours or type minutes. The clock starts when the job is logged and stops when an engineer is first assigned.
4. Optionally set **Resolve within** for a fix-time target.
5. Set **Flag as "at risk" when this % of the response window has elapsed** — 80% means a job is flagged before you breach, not after.
6. Tick Active and save.

When more than one policy fits a job, the most specific wins: a matching customer scores 4, a discipline 2 and a call type 1, and the highest total applies. Keep one "All customers / Any discipline" policy as a safety net so no job is left without a target.

2.5 App Users

Everyone who uses the EM8 HQ app needs an app user profile here — engineers, and sales staff who carry out surveys. The screen has two lists: Engineers and Sales.

- **Engineers sync automatically.** Anyone given the Engineer role in the portal appears here by themselves. Open them to complete their details.
- **Sales users are added by hand** with **Add App User**. They can be given jobs such as surveys and use the app, but they are not shown in the Diary and are not scheduled.
- Each active person uses one **app user seat**. The page shows how many you have used. Anyone over the limit is marked **No seat** and cannot be assigned work. To add seats, speak to Engineer M8.

What to fill in

1. Go to Settings → App Users and open the person, or click **Add App User**.
2. Check the **Type** — Engineer or Sales — and the **Display Name**, **Mobile** and **Area**.
3. Enter their **Home Postcode**. This is what the automatic scheduler measures travel from — without it the engineer is left out of every plan.
4. Set **Day Starts**, **Day Ends** and **Max Visits Per Day** (8 unless you change it).
5. 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.
6. Enter **Daily Rate (£)** and **Hourly Rate (£)** if you want cost figures on reports.
7. Leave **Include in Auto-Scheduling** on, or turn it off for apprentices and subcontractors you plan by hand. **Include in Passing By** decides whether their van is watched for the passing-an-open-job alert (Section 2.8).
8. Save.

Portal User ID (optional) is only asked when you add someone by hand. Engineers already carry it from their portal login; you only type one to give an office or sales person the app. **Status** (Active / Inactive) is shown when you edit someone. An engineer you set to Inactive stays inactive until somebody reactivates them.

The list's **Routable** column shows whether each engineer can be planned automatically — Yes, No postcode, Not located or Excluded. The **Hours** button on each row opens that person's timesheet (Section 10).

Working days

Most engineers work Monday to Friday, but one 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.

2.6 Forms & Surveys

Forms are the checklists, inspection sheets and surveys your engineers complete on site. EM8 supplies a set of defaults you can use as they are, and you can build your own.

Using 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. Use it as it is, switch it off with its toggle if you do not want it, or click **Customise** to get your own editable copy. Deleting your own copy later brings the EM8 default back.

Telling EM8 where a form belongs

A form is not offered on every job. Each template carries rules — under **When does this form apply?**, click **Add rule** and choose a **Call type** and/or a **System type**, and whether the form is **Required** there. An engineer opening a job is given the forms whose rules match the work in front of them.

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 record saying something nobody checked.

- A form with no rules is shown as **on demand**. It is never put on a job automatically, but anyone can add it to a job by hand from the job's Forms tab.
- A required form must be submitted before the job can be completed.
- Where the job names a specific system, 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 gets the fire alarm checklist.

Building your own form

1. Click **New job form** or **New survey**. Give it a **Form name**, a **Code**, a **Discipline** and a **Description**.
2. Choose what it is **Used for** — Job form, Site survey or Customer form.
3. Turn on **Signature** only if this form needs its own signature. The job's sign-off at Complete is copied onto its forms anyway.
4. Add sections, then add questions to each section.
5. For every question set the answer type (see below). Mark questions **Required** where an answer is non-negotiable, and add helper text where an engineer might need guidance.
6. Add the rules saying where it applies, tick Active and save.

Answer types: Heading (no answer), Text, Long text, Number (with optional min, max and unit), Yes/No, Yes / No / N/A, Pass / Fail / N/A, Tick box, Dropdown, Dropdown (many), Radio buttons, Date, Time, Date & time, Photo (with a maximum number of photos), Signature and Repeating rows.

Changing a live form: While a form has never been filled in, you can **Edit** it. Once anyone has submitted it, the button becomes **New version** — submissions already completed stay attached to the version that was current at the time, which keeps your records defensible. Tick **Show old versions and replaced defaults** to see earlier versions.

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. Fill in the mapping: the **Sales account** (required), the **Bank account for payments**, **VAT registered**, the **Standard-rate** and **Zero-rate tax codes**, and the **Xero branding theme**. Click **Save mapping**.

Leave the bank account blank and payments stay here. Payments you record in EM8 Core are only sent to Xero when a bank account is mapped. Payments recorded in Xero still come back either way.

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.
- **Email invoices from Xero automatically** — on: once an invoice lands in Xero, Xero emails it to the customer using your branding theme. 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 logged. An invoice Xero has emailed shows an **Emailed by Xero** tag.

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 reads **Mark Sent**. 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 EM8 invoice number becomes the Xero invoice number. The Xero Reference is the customer's PO reference, or the job number where there is none.
- 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. An invoice settled in Xero by a credit note, overpayment or prepayment is recorded here as "Settled in Xero". The invoice moves to Paid without anyone touching it.

- An invoice voided in Xero becomes Cancelled here.

Sending, retrying and checking

With auto-send off, Billing → 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. Each invoice also has its own **Send to Xero** / **Resync Xero** button.

The Xero column on the Invoices list shows **In Xero**, **Not sent**, **Queued**, **Error** or **Voided**. Settings → Xero shows the last successful sync, a **Waiting to sync** queue with a **Retry** button per invoice, an **Activity** log, and **Check Xero for payments now**.

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. Both alerts here work by comparing your jobs with where the engineer's van actually is, so they are only worth setting up if you also have Tracking Guardian. Both start switched off.

Late for a booked job

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, 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.
- 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, no tracker on the van, a position too old to trust, or a site that was never located all count as cannot tell.

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. Five minutes at least; 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.
Stop checking after	How long after the booked time to keep looking. Two hours by default.
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: it is the fastest way to find out which fleet records are out of date.

Setting	What it does
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.

1. Go to Settings → Alerts.
2. Click **Test now** before anything else. It runs the whole thing against today's 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, leave the radius at 750 m to begin with, choose who gets told, turn Alerting on and save.

Each verdict fires at most once per job per day. Every alert is written to the job's activity log, and **Alerts sent — last 7 days** lists them with the verdict (for example On the way, On another job, No tracker position, Tracker stale), how late, the distance and who was told.

Van passing an open job

The second card tells the **office** when an engineer's van passes a site that has an open job — measured along the route between the job they last completed and their next booked one. It is how a ten-minute fault gets picked up by the engineer who is already driving past.

- **Alerting** — off by default.
- **Flag open jobs within** — how far from the route counts as passing, in miles (2 by default).
- Engineers with **Include in Passing By** turned off in App Users are never watched.
- It has its own **Test now**, **Save corridor settings** and a **Corridor alerts sent — last 7 days** log.

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.



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

3.1 Adding a customer

1. Go to Customers → Customers and click **New Customer**.
2. Enter the Customer Name, 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. These two and the contact name are only asked here, when the customer is created.
6. Set Credit Limit and Credit Days. Credit Days sets the due date on their invoices (30 if left blank). The credit limit is shown on the record for reference; it does not stop anything — the credit hold does (Section 3.5).
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 the **Status** — Active, or **Prospect** for someone you have quoted who is not yet a customer — and save.

> **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 customer record

Open a customer to see five summary cards — Sites, Open Jobs, Active Contracts, Outstanding and Credit Limit — and these tabs:

Tab	What it holds
Details	Contact, address, credit terms and settings. **Edit** changes them, and adds Admin Remarks. Status here is Active, Inactive or Suspended.

Tab	What it holds
Sites	Every site the customer owns. **Add Site** is here — a site can only be created from its customer.
Jobs	Their latest 50 jobs. **Log Job** opens the job form with the customer already chosen and only their sites offered.
Contracts	Every contract across their sites, read-only. Click a row or **Manage** to open the site, where contracts are edited.
Invoices	Their latest 50 invoices.
Contacts	Customer-level people. **Add Contact** takes title, name, job title, phone, mobile, email and notes.
Notes	Customer-level history. **Add Note** (also in the header) takes a type: General, Important, Financial, Complaint or Follow Up.

A prospect becomes an active customer by itself when its enquiry is won (Section 11.1).

3.2 Adding a site

1. Open the customer, go to the Sites tab and click **Add Site**.
2. Enter the site Name and full address including postcode.
3. Add a contact name, the Fire Authority and Police Authority if relevant, a **Risk Rating** (1–5), and any **Service Instructions** for the engineer.
4. Save. The site is now selectable when logging a job.
5. To show a warning to everyone who opens the site — "dog on site", "report to gatehouse" — open the site, click **Edit Site** and fill in the **Alert Message**.

> **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 and the van alerts use. A site with no postcode can never be scheduled automatically.

3.3 What you can hold against a site

Open any site from Customers → Sites (or from its customer). Summary cards across the top include the Next Service due. The header has **Log Job**, **Edit Site** and, for admins, **Move to customer**. Below are these tabs:

Tab	Use it for
Details	Address, contact, URN, monitoring station ID, fire and police authorities, risk rating, premises type, service instructions and notes. A **High Risk** tag appears by itself when the risk rating is 3 or more. The Alert Message shows as a banner on the site and on its jobs.
Equipment & cover	Every system on the site, its maintenance cover, its next service date, its contract and the equipment inside it. See below.
Jobs	The site's latest 50 jobs.
Quotes	Current and past quotes for the site, with a PDF button. Click a quote number to open it in Sales → Quotes.

Tab	Use it for
Contacts	Site-level people — caretaker, facilities manager, key holder. **Remove** takes a contact off straight away, without asking.
Cabinet	Drawings, risk assessments, O&M manuals, previous certificates. Click **Upload Files** or drag files onto the panel. Images and PDFs preview in place; other files download. Certificates issued from a job are filed here automatically.
Notes	Free-text history with a category (General, Important, Financial, Complaint, Follow Up). Notes can be edited or deleted.

Equipment & cover

Each system on the site is a row. A strip across the top counts Systems, Under maintenance, Overdue and Assets, and red and amber banners count anything overdue or unscheduled. Each row shows:

- Its cover — **Covered**, **Due soon** (within 30 days), **Overdue**, **No schedule set**, or **Not maintained**.
- Its service interval and next due date. Open a row to see Last serviced, Next due, Panel / type, Contract and Maintenance notes.
- The contract paying for it.
- The equipment inside it, including linked Surveillance Guardian kit and retained imported snapshots. Live fire-safety devices and inspections are managed in the Fire-safety equipment panel.

Two of those statuses are worth knowing. **No schedule set** means a system is under maintenance but has no **Service interval (months)** — nothing will ever raise a visit for it, and 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. An **Equipment not assigned to a system** card lists kit no schedule covers.

Adding and editing a system

Anyone in the office can **Add system** or remove one. Editing an existing system is **admin only**, because its dates drive what is raised and billed. These are the settings that matter:

- **Discipline** — required. Fire Alarm, Intruder Alarm, CCTV, Access Control, Emergency Lighting, AOV, Dry Riser, HVAC, Ducts & Dampers, Sprinkler & Suppression, Fire Extinguishers, Fire Doors, Door Entry, Nurse Call, PA / Warden Call, General Maintenance, Multi-discipline or Other. The forms, SLA targets, certificate standards and reports all key off it, so a system without one is invisible to all of them.
- **Under maintenance** — whether a visit is expected at all. A system that is not under maintenance is never extracted and never shows as overdue.
- **Covered by contract** — the contract that pays for it. Leave it blank for "No contract — chargeable".
- **Service interval (months)** and **Next Service Date** — when it is next due and how far each completed visit moves it on. The Next Service Date is what the monthly run reads (Section 6).

Linked CCTV and integrated fire-safety equipment

Use Link Surveillance Guardian for monitored CCTV equipment. Fire-safety devices are managed directly in Equipment & cover → Fire-safety equipment. Add equipment prepares or reuses the underlying logbook automatically. Existing records that may belong to the site require administrator review before adding devices. See Section 16; routine FireLog link and unlink controls are no longer part of site setup.

Contracts on the site

The **Maintenance contracts** card sits at the bottom of Equipment & cover, so the money and the schedule are read together. Only active contracts are listed. Adding, editing and deleting contracts is admin only (Section 6.1).

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

Fire-safety devices and inspection records are managed in the same Equipment & cover workspace. See Section 16 for equipment and tags, and Section 17 for customer online access.

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.

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

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. The move is written to the Audit Log, and the confirmation tells you what moved — "Site moved with 14 jobs, 2 service contracts".

Contacts and notes recorded at customer level — not on the site — stay on the old customer record. Copy anything worth keeping across by hand. Customers cannot be deleted from EM8 Core; once a duplicate is empty, set its status to Inactive so it drops out of your lists.

3.5 Credit hold

A credit hold tells everyone that an account needs attention before more work is booked — without stopping an emergency going out.

1. Open the customer and click **Place on credit hold** (above the tabs). Office and admin only.
2. Enter the reason — it is required — and confirm.
3. A yellow banner now shows on the customer: "This account is on credit hold", with the reason and the date. **Release hold** ends it.

What a hold does:

- Every Log Job form shows the hold and its reason as soon as the customer is chosen, and asks for a **Reason for booking on hold** before it will save. The job can still be booked.
- The incoming-call pop-up shows "Account on credit hold" with the reason, so whoever answers knows before they promise anything.
- Auto Schedule's **Generate visits — all sites** skips contracts for customers on hold, and lists them as skipped with the reason.
- Reports → Custom Reports → **Customers on credit hold with live work** lists held accounts that still have open jobs or live 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. 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 — or the engineer left site needing to return.
Complete	The engineer has finished and written up what they did. The office now checks it.
Ready to bill	The office has sent it to Billing. It is waiting on the Jobs to Invoice list.
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.

The job page shows a progress bar across the top: logged → assigned → in progress → complete → ready to bill → invoiced.

Changing a status by hand

Status is not a field you edit. Every closing state has exactly one route to it, so nothing can bypass billing:

- **Complete** — the engineer's Complete, in the app or on the job page.
- **Ready to bill** — **Send to Billing** on the job. It only appears once the job is Complete.
- **Invoiced** — **Create Invoice** on the Billing list, or **Mark Invoiced** (on the Billing list or the job header) for an invoice raised outside EM8.
- **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** (back to Assigned, or Open if nobody is assigned), **Mark In Progress**, **Cancel job** (a reason is required) and **Re-open** a cancelled job. Each one is written to the job's Actions with who did it and why.

4.2 Logging a job

1. Go to the Jobs tab and click **New Job** — or **Log Job** on a site, or on a customer's Jobs tab, which fills in the customer for you.
2. Select the **Customer**, then the **Site**. If the customer is on credit hold, the form says so and asks for a **Reason for booking on hold** (Section 3.5).
3. Choose the **System / Equipment** the job is for. It is optional, but it decides which forms the engineer is given and which system's next service date moves on when the job is completed.
4. Choose the **Job Type** — one of the call types you set up in Settings.
5. Enter a short **Job Title** (what appears in lists) and the **Job Description** — what the caller actually told you. The more detail here, the fewer return visits.

6. Set the **Priority**. It defaults from the job type but you can override it.
7. Add the customer's **Customer Ref** and **PO Number** if they have given you them. The PO carries through to the invoice.
8. Set **Scheduled At** if you already know when it is going.
9. Click **Log Job**. The job gets a number and appears on the Jobs list.

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

The Jobs list

The Jobs list is a worklist. By default it hides jobs that are Ready to bill, Invoiced, Closed or Cancelled, and puts Complete jobs — the ones waiting for the office — at the top. Tick **Include billed & closed**, or pick a status, to see the rest. Filter by status, job type (including archived types) and priority, and search by job number, PO, customer, site or fault text.

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 the same thing behind the scenes:

- **From the job** — open it and click **Assign Engineer** (shown while the job is Open), then pick from the list.
- **From the Diary** — in Day view, drag the job from the Unscheduled panel onto an engineer's column at the 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 notified.** A push notification goes to the engineer's phone when a job is assigned to them, taken off them, or when its scheduled time is moved — and when their monthly route is issued. 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 how long to allow

The Assign Engineer window will not save without a date and time — the Diary only shows jobs that have one. It also asks how long to allow: thirty minutes up to five 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.

Changing or taking a job off an engineer

- On the job — **Unassign**. The job returns to Open and the engineer is told it has left their list. To give it to someone else, Unassign and then Assign Engineer again.
- 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. In Day view you can also drag it to another engineer's column.

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

Anything longer than a day 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 (half an hour to twelve) 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. The bin icon 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.

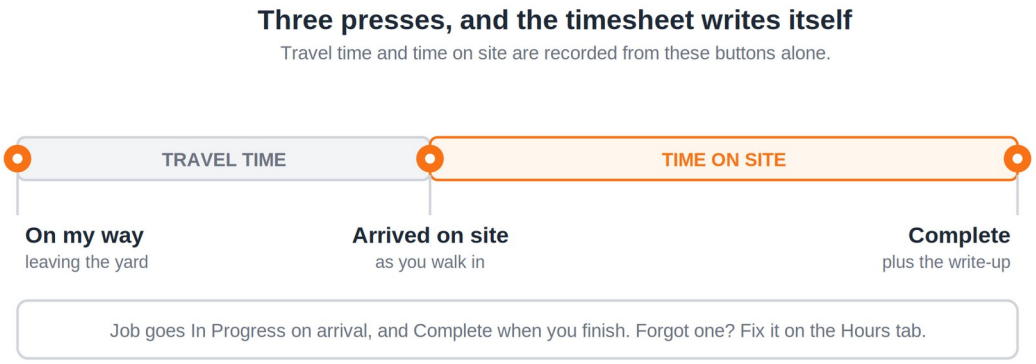
An engineer without a portal login can only be booked for the first day, and is shown in Add visit as "no login — cannot be diarised".

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.

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, inspection sheets, asset checks — adding photos where asked, and submit each one. A required form 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, with the rest of the form underneath.

The job's sign-off at Complete is copied onto its forms, so most forms do not need a signature question of their own (Section 2.6).

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 tab when the write-up is checked.

Coming back another day

If a second visit is needed, the engineer uses **Left site — return needed** rather than Complete. The clock stops and the job goes **On Hold**, so it shows up as needing attention. When the engineer next presses Arrived on site it goes back to In Progress, and a new visit is recorded — or the office can press **Resume**.

Completing from the portal

The job page also has a **Complete Job** button while the job is In Progress. It asks for the work carried out and the time spent. Only the assigned engineer can complete a job — anyone else pressing it is told so — so this is for an engineer working at a computer, not for the office.

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 on the **Charges** tab — add anything missed, remove anything that should not be billed.
3. Click **Send to Billing**. The job moves to Ready to bill and appears on Billing → Jobs to Invoice.
4. 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. You can also email one at any time with **Email job sheet**, or print one from **Print / PDF**.

Chasing the paperwork

Cards across the top of the Jobs tab count what needs attention. Click one to filter the list to just those jobs.

Card	Counts
Open Jobs	Every job still being worked.
Unassigned	Jobs with no engineer.
Urgent	Open jobs at Urgent priority.
Maint. Overdue	Maintained systems whose next service date has passed.
Waiting on engineer	Jobs Assigned or In Progress whose scheduled day has gone, with nothing sent back. A job only appears the day after its scheduled time, so an engineer finishing at five is not chased at five.

4.6 Everything on a job record

Across the top: cards for Logged, Scheduled, Engineer, **On Site** (with a "Now" tag while someone is there) and Total Charges. The header carries the buttons for the stage the job is at — Assign Engineer, Unassign, Edit, Quick Quote, Certificate, Email job sheet, Print / PDF, the status buttons, Send to Billing and Mark Invoiced.

Tab	Contains
Details	Customer, site, job type, priority, status, system / discipline (a **Not set** warning when empty), PO and customer references, logged / scheduled / required-by / completed timestamps, the **Visits** card, and the **Job sheet emails** log — every send, when, to which address, and why any failed. A job closed without charge says so here.
Actions	A running log of what was done, by whom and when. **Add Action** records a Site Visit, Phone Call, Note, Parts Used or Follow Up, with time spent. Most action entries print on the job sheet.
Charges	Parts and labour with quantity, unit price, VAT and line totals. **Add Charge** — Part, Labour, Expense or Other, optionally picked from your products. Each line shows who added or edited it, or which quote it came from. Office and admin only. Charges lock once a job is Invoiced, Closed or Cancelled, and after Send to Billing they need the Invoices permission to change.
Forms	The forms on this job, marked required, optional or needs signature, with an amber banner naming any still to complete. **Add a form** puts any other form on this job only. Office can fill in, save a draft or submit a form here too.
Quotes	Any quote raised from this job, including Quick Quotes signed on site.
Time	Every visit: Left for site, Arrived, Left site ("On site now" while running), Travel, On site, **Source** (App or Office) and a **GPS** pin showing where Arrived was pressed. See below.
Notes	Internal commentary that does not go on the job sheet. General, Important or Follow Up. The office can edit or delete any note; others only their own.
Photos	The engineer's photos with caption, who took them and when. Click one to open it full size, with its GPS position where recorded.

Correcting the times on a visit

Engineers forget to press buttons, or press them late. Anyone in the office can put it right from the job's **Time** tab:

1. Open the job and go to the **Time** tab.
2. Click the pencil on the visit that is wrong. **Correct recorded time** opens.
3. Enter the correct **Left for site**, **Arrived on site** and **Left site** times.
4. Enter the **Reason for the correction** — it is required — and Save.

Travel and on-site minutes are worked out again from the new times, the job's totals update, and the correction is logged with who made it and why. The visit's Source changes to Office.

- A visit that was never tapped at all: click **Add a visit manually**, enter the times and say why it is being entered by hand.
- A duplicate visit: an admin can delete it with the bin icon. The hours it contributed come off the timesheet.
- You can also correct any visit from Reports → Hours → Every Visit (Section 10.2).

Editing a job

Edit (office) changes the Job Type, Priority, Job Description, Action Taken, Customer Ref, PO Reference, System / Discipline, Scheduled At and Time to allow. The job title and status are not edited here.

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.

- **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.

Issuing one

1. Open the completed job and click **Certificate** (office, from Complete onwards).
2. Check the standard on the dropdown. It is chosen from the discipline of the work, and changing it changes the questions. If the job has no system set, a warning says so — set it first.
3. Answer the questions — extent of the system covered, variations from the standard, faults found, whether it was left operational, and any the standard needs (devices tested, false alarms in the last 12 months, automatic detectors, next service due, the signatory's position).
4. Read the answers once more, then click **Generate & preview**. This issues the certificate: it gets its number and is filed against the job and the site.
5. Read the real PDF. **Download** if you want a copy.
6. Click **Email to customer**, check the address, and **Send**.

> **Generate & preview issues the certificate.** Going back with **Change answers** and pressing Generate & preview again issues a second certificate with a new number. Check the answers before the first press.

What happens to it

- The PDF is filed in the site's **Cabinet**, so it is there next time anyone opens the site.
- 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.
- An address you type is saved to the customer only when they have no email on file.

Jobs that do not need one

Reports → Custom Reports → **Jobs awaiting a certificate** lists completed jobs with no certificate. Where one genuinely is not needed, click **No certificate needed** on the row and give a reason. The job shows a **No certificate needed** tag instead of the Certificate button, and drops off the report and the dashboard count. **Restore certificate requirement** on the job undoes it.

Getting one wrong

An issued certificate is never edited. A wrong one is voided with a reason, and a replacement issued from the same job. The voided one stays on the record marked as void. 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 withdrawn version. If you need a certificate type EM8 does not hold, 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. Engineers see only their own diary.

5.1 Scheduling work

1. Go to the Diary tab. Switch between **Day** and **Week**, and use ‹ Today › to move around. Filter with the engineer chips — All, each engineer, or Unassigned.
2. Click **Show Unscheduled** to open the panel of jobs waiting to be booked. **Search jobs…** finds one. A green hint shows when an unscheduled job is near one already booked — "3 mi from JOB-… on Tuesday · Dave".
3. In **Day view**, drag a job onto an engineer's column at the time you want. This assigns it.
4. Or click **New Entry** — or double-click an empty slot — to create a diary item: give it a Title, Description, Start and End, choose Assign To and pick a Colour.
5. Drag an existing tile to move it. It keeps its length. To change an entry's length, open it and change its End.
6. Click a tile to open it.

> **Day view and Week view behave differently.** In Day view, dropping a job on another engineer's column moves it to that engineer. In Week view, a drop only changes the date and time — never the engineer.

Colours

Job tiles are coloured by their call type, with a legend above the grid: green for planned maintenance, red for faults and reactive work, blue for installations, purple for return visits, cyan for quotes and surveys, amber for takeovers and commissioning, grey for disconnections and removals. Your own diary entries are orange unless you pick a colour.

> **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

- **Open job**.
- **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 appears whenever it holds work, even when you have filtered to particular engineers, and the Unscheduled panel carries a short amber list at the top, **Booked, no engineer**. A booked visit nobody is doing is the one thing a planner most needs to see.

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. Set the days on Settings → App Users.

Jobs booked across several days

A job with more than one visit draws once per visit. 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 and the monthly run

If you hold service contracts, this is the section that saves you the most time. Each maintained system on a site carries its own next service date. Every month you press a button, a job appears for everything that is due, and you plan those jobs into the diary.

Two things work side by side, and it helps to keep them apart:

- **The work** follows the systems. Each system's **Next Service Date** says when it is due. It is the single answer to "when is this system next due?".
- **The money** follows the contract. The contract says what the customer pays and how often they are invoiced, whether or not a visit has happened yet.

The monthly routine is three steps, in this order:

1. **Run Extract** — raise a job for every maintained system that is due this month, or overdue.
2. **Plan** the jobs into the Diary.
3. **Invoice** — a separate monthly run in Billing, on each contract's own cycle (Section 8.4).

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

6.1 Systems, contracts and dates

The system: when it is due

On the site's **Equipment & cover** tab, each system that is serviced needs (Section 3.3):

- **Under maintenance** turned on.
- A **Service interval (months)** — how far each completed visit moves the date on. Without one the system shows **No schedule set** and its date never moves.
- A **Next Service Date** — when it is next due.
- Ideally, the contract that pays for it under **Covered by contract**.

The contract: what is paid

Contracts are on the **Maintenance contracts** card at the bottom of Equipment & cover. Adding, editing and deleting them is admin only.

Field	What it does
Discipline	Required. Which trade the contract covers. A system with no contract of its own is treated as covered by a live contract on the same site of the same discipline, or a Multi-discipline one.
Contract Name	What the contract is called on lists and invoices.
Visits per Year	Required. Enter **0** for monitoring, a router rental or any standing charge that buys no visit — systems covered only by a 0-visit contract are never extracted. Blank shows an amber **Not set** tag: nobody has said yet.
Annual Value (£)	What the contract is worth for a year.

Field	What it does
Invoice Cycle	Annual, Every 6 months, Quarterly or Monthly. Each invoice is the annual value divided by the number of invoices a year — £6,000 quarterly is £1,500 a time.
Contract Start (period anniversary)	A day and month. It sets the period shown on each invoice, for example "Nov 2026 – Oct 2027".
Contract End Date	An expired contract stops covering its systems.
First Visit Month / Specific Months	Only used by Auto Schedule's Generate visits (Section 6.5). Hidden when Visits per Year is 0.
Next Visit Due	Read-only. It is the earliest Next Service Date of the systems on the contract — change it on the system.
First Payment Date / Next Invoice Date	**Next Invoice Date** drives the invoice run and moves forward each time the contract is invoiced. Set it ahead of the anniversary to invoice in advance.
VAT Rate %, Status	Status is Active, Pending or Cancelled. Only active contracts are listed on the site.

Check contracts created in the portal before October 2026. Before this release the Invoice Cycle list saved the wrong number, so a contract set to "Annual" was invoiced monthly at a twelfth, and one set to "Monthly" once a year. Open any contract created or edited in the portal and check its Invoice Cycle now reads what the customer actually pays. Contracts imported from your old system were not affected.

Completing a visit moves the date on

When a planned maintenance job is completed, the system it was for has its Next Service Date moved on by its service interval. The rules:

- The date moves 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.
- 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, so slippage does not quietly become fewer visits a year. If a visit is more than a whole interval late, the next date starts from the completion date instead.
- The job must name the system, and the system must have a service interval.
- A fault call does not move the date, and nor does a visit recorded on the form as no access.

Cancelling a contract

Set a contract's status to Cancelled and the systems it was paying for come off maintenance in the same save — unless another live contract on the site still covers them. A customer moving from a gold to a platinum contract has not stopped paying, so cancelling the old one leaves the system alone. The portal tells you which systems went. Reactivating a contract does not put systems back on maintenance — that wants a person, because the visit dates need setting.

6.2 Run Extract — raising the month's jobs

Go to **Auto Schedule → 1. Run Extract**. The Auto Schedule tab is admin-only by default; it can be granted to a named person (Section 1.2). Checking and printing are open to anyone who can see the tab; running the extract is admin only.

1. The month picker 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 **Due in** table. Each row is one system, with its customer, site, postcode, contract and a status tag — Job to create, Already raised or Skipped.
5. Click **Print the sheet** if you want the paper list to work from (Section 6.3).
6. Click **Run Extract** and confirm with **Run the extract**. The button is greyed out when there is nothing to create.
7. Plan the jobs — drag them from the Diary's Unscheduled panel onto engineers (Section 5).

What the extract picks up

Every system that is **under maintenance**, whose **Next Service Date** falls on or before the last day of the month — so overdue systems are included — and which a live contract covers. Visits per year and visit months play no part: if a system is dated, it is extracted.

What it creates

- **One job per system**, unassigned, dated the 1st of the month at 09:00 as a placeholder. That date is a holding position, not a promise — planning decides the real day.
- Titled "System name — planned maintenance", with a description saying which month it is for and when it was due.
- Linked to the system and its contract, so completing it moves the system's date on and the contract shows every visit made under it.
- Filed under your maintenance call type (Section 2.3). When 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.

> **Safe to press twice.** A system already counts as raised if it has any open job at all — of any type, from any month — or any job logged or scheduled for it in the month. So running January again on the 28th creates nothing new. One consequence worth knowing: an open fault call on a system stops that month's maintenance job being raised for it.

The **Extract history** card lists each month extracted, how many jobs it raised and how many are completed.

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 systems 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 the preview, so you can print it, take it to a meeting and decide afterwards whether to run the extract at all.

6.4 Systems that produced nothing

Both the screen and the sheet list maintained systems that could not be extracted, with the reason:

Reason	Fix it by
No next service date on the system	Setting the Next Service Date on the system. These are listed every month until fixed.
Maintained but no active contract covers it	Linking the system to a live contract, or adding one of the same discipline on the site. Expired and cancelled contracts count as none.
Site has no customer	Moving the site under its customer (Section 3.4).
Could not create the job	Trying again; if it persists, report it.

Fix the system on Equipment & cover, then click Check month again.

6.5 Auto Schedule — planning routes

Tab **2. Auto Schedule** is a different route to the same month's work. It plans **planned visits** into efficient routes and then creates the jobs itself — already assigned to engineers and dated.

> **Use Run Extract or Auto Schedule for a month — not both.** Auto Schedule does not use the jobs Run Extract created. It works from planned visits and raises its own jobs, so running both for the same month gives two jobs for every visit.

Before the first run

1. Settings → App Users: give every engineer who should be planned a **Home Postcode** and leave **Include in Auto-Scheduling** on.
2. Read the readiness figures at the top — **Visits due**, **Sites unlocated**, **Engineers routable**, **Planned ahead** — and the amber "Before you can plan this month" box, which lists anything blocking you.
3. If sites are missing a location, use **Locate sites from postcodes**.
4. Click **Generate visits — all sites** (admin). It creates twelve months of planned visits for every active contract, from the contract's visits per year, first visit month and specific months. It is safe to run again. Contracts on credit hold, with no visits per year, or with no start or next visit date are skipped and listed.

Running it

1. Under **Plan settings**, choose the **Month to plan** (it opens on the earliest month with unplanned visits, even an overdue one), the **Engineers** (all if blank), **Days nobody works** such as bank holidays, **Max stops per day**, and whether to **Keep sites with a named engineer on that engineer**.
2. Click **Build plan** (office or admin). Nothing is created yet — you get a proposed schedule: Scheduled, Unplaced, Working days, average stops per day and total driving, with each engineer's route by day.
3. Read the unplaced list. Each says why: the site has no postcode, the site has no usable location, or no engineer had capacity within reach this month.
4. Click **Create the jobs** (admin) and confirm. The jobs are created, assigned and put in the diary, and the engineers are notified.

Previous runs lists each plan. **Undo** (admin) removes that run's jobs that are still Open or Assigned and puts their visits back to planned; anything already started is left alone. Anything Auto Schedule creates can be dragged elsewhere in the Diary afterwards.

7. Quotes

7.1 Building a full quote

1. Go to **Sales → Quotes** and click **New Quote** (office and admin).
2. Under ① **Customer & Details**, select the Customer and Site and set **Valid Until**. If the quote came from an enquiry, pick it under **Raised from enquiry**.
3. Answer **What is this quote for?** — Works / installation; Maintenance contract; Monitoring / standing charge (it buys no visit); or Works + maintenance. A contract type opens the Contract terms card — see below.
4. Under ② **Line Items**, add lines. Pick from product searches Stock & Products and fills in the description, unit price and VAT rate; or type a line freehand.
5. Add ③ **Notes & Terms** and check the Net, VAT and Total.
6. Click **Create Quote** (or **Save Changes**). A new quote is a Draft.

Contract terms on a maintenance or monitoring quote

For a contract type, the Contract terms card captures what the customer agrees to when they accept:

- **Visits per year** — 0 is allowed, for monitoring and standing charges.
- **Visit months** — pick the months if the visits are not evenly spread.
- **Invoiced** — Annually, Twice a year, Quarterly or Monthly.
- **Annual value** — defaults to the quote's net total (on a works + maintenance quote, enter the recurring part on its own).
- **Starts** and **Term (months)**, which together set the contract end date.
- **Discipline** and **Contract notes**.

Nothing is required to save the quote, but a value that cannot be right — thirteen visit months, say — is refused, because a bad value here becomes a bad contract once accepted.

> **Acceptance never starts billing on its own.** When a contract-type quote is accepted, its terms are saved as a draft contract awaiting approval. Nothing is invoiced until it is approved and active.

Emailing the quote and online acceptance

Click **Email Quote** on the quote, or the envelope on the quote list. Fill in To, **CC**, Subject and Message, and tick **Send me a copy** if you want the thread in your own inbox. The quote PDF is attached and the email carries a **Review & Accept** link. Sending moves the quote to Sent.

The customer can open the link, read the quote and sign online. Signing approves the quote, records "Accepted online by" with their name, and notifies the salesperson on the enquiry — or the whole office if there is none.

> **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 keeps it out of the customer's spam folder.

Changing a quote's status

Every status change goes through one button, **Change status**, and a New status list that only offers the moves that make sense:

- **Sent** — when you sent it some other way.

- **Approved** — only from Sent. The **Approve Quote** window asks **Who authorised this?** and for their **PO number**, which show on the quote's approval panel.
- **Declined** — with an optional reason.
- **Expired** — set by hand. Nothing expires a quote automatically when Valid Until passes; the date is a reminder.
- **Created in error** — for a Draft or Sent quote that should never have existed.
- **Draft (reopen quote)** — brings a Declined, Expired or Created-in-error quote back.

A quote that has been signed, accepted or converted cannot change status again. The quote's approval panel shows how it was accepted — Accepted online by, Signed on site by, or Approved by (office).

Turning a quote into a job

An Approved quote shows **Convert to Job**. Choose the Customer, Site, Job Title, Priority and Scheduled At; the lines come across as charges so nobody retypes them. A Quick Quote raised on a job is not converted — its charges are already on that job.

Quote status	Means
Draft	Being written. Not yet with the customer.
Sent	With the customer, awaiting a decision.
Approved	Accepted — online, on site, or by the office. Go ahead and raise the job.
Declined	Turned down. Kept for your conversion reporting.
Expired	Marked as lapsed by the office.
Created in error	Raised by mistake. Kept for the record.
Converted	Turned into a job.

7.2 Quick Quote — quoting on site

Quick Quote is for the moment extra work is spotted while someone is already there. It is designed to be done on a phone in under a minute, and is also on the job page in the portal for office, admin and engineers.

1. From the open job, tap **Quick Quote**.
2. Add each part — **Search stock...** or type a description — with its Qty and Price. **Add line** for more.
3. Enter the **Labour hours** and the **Rate (£/hr)**. The Net, VAT and Total calculate as you go.
4. Add Notes for the customer explaining the work.
5. Tap **Continue to signature**. The quote is numbered at this point.
6. Enter the **Customer name**, have them sign, and tap **Accept & sign**. The quote's lines are added to the job's charges straight away.
7. If they say no, tap **Customer declined** — it is still recorded, which is useful evidence if the fault comes back.

8. Billing and invoices

Billing has three screens. **Invoices** is the ledger and opens first. **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. Office and admin can use all three; engineers cannot see invoices at all.

8.1 The Jobs to Invoice worklist

Every job that has been sent to billing and is waiting to be invoiced, with its job number, customer and site, title, engineer, completion date, PO and customer references. A **Visible value (net)** card totals what is on the page, and a search box finds a job.

Create Invoice raises a draft invoice from the job's charges and marks the job Invoiced in one go — it leaves the list straight away. The invoice is due after the customer's credit days (30 if none are set) and carries their PO reference. Review and issue it from Billing → Invoices.

Mark Invoiced is for a job you invoiced in another system, not EM8.

Jobs that are already paid for

A maintenance contract is billed in advance, so a planned visit has nothing left to invoice — but it still arrives on this list. Those jobs 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 the system it was done on is linked to a live contract and the job type is planned maintenance (Section 2.3). A fault call on a contracted site keeps its Create Invoice button. **Invoice anyway** is still there, behind a second confirmation, for the visit that turned into chargeable work.

Closing a job without charging

Every completed job comes to this list. Beside Create Invoice is **Close without charge**. It asks for a reason (warranty revisit, goodwill, covered by a call-out contract, internal), closes the job with no invoice, and puts the reason on the job's record. The person closing it can see the charges and whether a contract covers it, which is what the decision depends on.

8.2 Raising an invoice

1. From Jobs to Invoice use Create Invoice — or go to Billing → Invoices and click **New Invoice**.
2. Choose the type: **Invoice**, **Credit Note** or **Proforma**.
3. Select the Customer and Site, and set the Invoice Date and Due Date.
4. Enter the Customer PO Ref if there is one.
5. Check the lines. **Add Line** (with a product picker) and the line bin work while the invoice is a draft. Each line carries its own VAT rate.
6. Add Notes if the customer needs an explanation.
7. Save, then issue it. Without Xero the button is **Mark Sent**. With Xero linked it reads **Finalise**, or **Finalise & send to Xero** (Section 2.7).

Each line shows description, quantity, unit price, VAT and gross, with Net, VAT and Gross totals at the bottom. Only drafts can be edited. **Download PDF** and **Print** are on the invoice.

> **Credit notes:** A paid invoice cannot be cancelled. To reverse one, raise a Credit Note against the customer.

8.3 Tracking what you are owed

Billing → Invoices lists every invoice with its number, customer, site, date, due date, net, outstanding (inc. VAT) and status, plus the Xero column when Xero is linked. Cards across the top show Total Invoices, Outstanding, Overdue and Paid. A due date that has passed shows in red with a warning mark.

Invoice status	Means
Draft	Not yet issued. Can still be edited.
Sent	Issued to the customer, not yet paid in full.
Paid	Settled in full.
Cancelled	Voided — here, or in Xero.

Recording a payment

Record Payment on the invoice is admin only. Enter the Amount Received, Payment Method (BACS, Cheque, Cash, Card, Direct Debit, Other), Payment Date and Reference. A payment cannot be more than the outstanding balance. A part payment leaves the invoice Sent; full payment marks it Paid and the job it came from Invoiced. With Xero linked, payments recorded in Xero arrive here on their own (Section 2.7) and are tagged "from Xero".

Cancel (admin) is offered on Draft and Sent invoices.

> **For chasing:** Reports → Reports shows Top Outstanding Balances — the customers who owe the most and the oldest amount due against each.

8.4 The maintenance invoice run

Billing → **Maintenance Invoices** raises the month's contract invoices in one pass.

1. It suggests the right month by itself. Click **Check month** (office or admin).
2. Every contract due to be invoiced comes back with its Annual value, Per Invoice amount, Cycle and Status. Figures across the top show Selected, Value (net), Already raised and Skipped.
3. Rows arrive ticked. Untick the exceptions — a customer in dispute, a site that closed last week. The Selected total updates as you go.
4. Click **Raise invoices** (admin). Only the ticked rows are raised.
5. The invoices are created as drafts. Review them, then send each one as normal.

Things worth knowing

- A contract is due when its **Next Invoice Date** falls in the month. Raising its invoice moves that date on by one cycle.
- The value is the annual value divided by the number of invoices a year. £6,000 a year billed quarterly is £1,500 a time.
- Invoices are dated the 1st of the month and due after the customer's credit days. The period they cover, such as "Nov 2026 – Oct 2027", comes from the contract start anniversary.
- 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. A contract already billed for the month shows "Raised" with its invoice number.
- A box lists contracts that cannot be billed and why — no annual value, no invoice cycle, or a site with no customer. **Billing history** shows each month's invoices, value and how much is paid.

9. Stock, products and purchasing

Stock & Purchasing has three screens: Products & Stock, Suppliers and Purchase Orders. Engineers can look; office and admin make changes.

9.1 Suppliers

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

9.2 Products

1. Go to Stock & Purchasing → **Products & Stock** and click **New Product**.
2. Enter the SKU, Product Name and Description.
3. Set the Unit Price (what you charge), the Cost Price (what you pay) and the VAT Rate.
4. Enter a Reorder Level and your Opening Stock, and save.

The list shows current stock against reorder level; a line running low has a red warning mark, and **Low Stock Only** filters to just those. Products appear in the picker whenever someone adds a charge, a quote line or an invoice line, which keeps your pricing consistent.

Adjusting stock

Click **Stock** on a product to open **Adjust Stock**. Enter a quantity to add (+) or take off (−); the new level shows before you save. Stock cannot go below zero.

9.3 Purchase orders

1. Go to Stock & Purchasing → **Purchase Orders** and click **New PO**.
2. Choose the Supplier and set the Order Date and Expected Date.
3. Add a line for each item — description, quantity and cost. Net, VAT (20%) and gross totals calculate automatically.
4. Click **Create PO**. It saves as Draft. Check it before you create it — a PO cannot be edited afterwards.
5. When you place the order, click **Mark as Ordered**. This stamps today as the order date.
6. When goods arrive, click **Record Goods Received**. Each line is pre-filled with the quantity still outstanding — change it to what actually arrived.

The PO moves to Part Received or Received, with a progress bar of received against ordered.

> **Check stock after receiving goods. A PO line linked to a product updates that product's stock; a free-text line without a linked product does not. Adjust free-text items through Products & Stock if needed, and do not add stock 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.

10. Hours and timesheets

Every time an engineer presses "On my way", "Arrived on site" and "Complete", EM8 Core records it. **Reports → Hours** turns those presses into a timesheet without anyone filling in a form. Everyone can open Hours; engineers only ever see their own.

10.1 Reading the timesheet

The period defaults to this month to date, with quick picks for This week, Last week, This month, Last month and Last 90 days. Leave the engineer filter on All engineers, or pick one. Cards show Total Hours, On Site, Travel and Visits. There are three views:

View	Shows
By Engineer	One row per engineer: days, jobs, visits, on site, travel and total hours, with a total row. **Visits** on a row jumps to that engineer's visits. This is the payroll view.
By Day	One row per engineer per day, with First On Site and Last Off Site.
Every Visit	One row per visit: date, engineer, job, customer, site, type, arrived, completed, travel, on site and billable. Click the job number to open the job.

Settings → App Users has an **Hours** button on each person, which opens this tab filtered to them.

10.2 Correcting times

Any visit can be corrected — not only the ones the system flags. If an engineer pressed Arrived at 9:00 but actually got there at 10:30, nothing looks wrong to the system; the office has to put it right.

1. Go to Reports → Hours and open **Every Visit**. Narrow it with the period and engineer.
2. Click **Edit** on the visit.
3. Enter the correct **Left for site** (optional — leave it blank to keep the travel already recorded), **Arrived on site** and **Left site** times.
4. Enter a **Reason for the correction** — it is required — and Save.

Travel and on-site minutes are worked out again, the totals update, and the correction is logged with who made it and why. You can do the same from the job itself: the pencil on its Time tab (Section 4.6).

Entries the system flags

People forget to press buttons. A warning panel above the views lists two problems, and these entries are left out of every total until they are fixed — so until someone deals with them, the hours shown are lower than the hours worked:

- **Never completed** — the clock was started and never stopped.
- **Auto-closed** — a visit left running for twelve hours was closed automatically.

Click **Fix** on the row and correct it the same way. **Close all runaway sessions** closes every session that has been running too long in one go, ready to be fixed. A visit closed because the engineer moved on to another job is not flagged — it counts normally.

A visit that was never tapped at all is added from the job: Time tab → **Add a visit manually** (Section 4.6). Deleting a visit is admin only.

10.3 Exporting

- **Export Summary** — one row per engineer with total hours. The payroll sheet.
- **Export Detail** — one row per visit. What you would send a customer with an invoice.
- **Export Daily** — one row per engineer per day. It appears while the By Day view is open.

Exports are CSV files, which open in Excel. They follow the period and engineer you have chosen.

> **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 — a simple pipeline without a separate CRM. Go to **Sales → Enquiries**.

The pipeline screen

- Cards: **Open pipeline**, **Weighted forecast**, **Won this year** and **Lost this year**.
- A stage board — New, Survey Booked, Surveyed, Quoted, Won, Lost — with a count on each. Click a stage to filter the list.
- Filters for stage and owner, and a **Still in play** switch.
- The list shows reference, who it is from (a **Prospect** tag for someone not yet a customer), the enquiry, owner, value, margin, stage, next date and when it was raised.

Logging an enquiry

1. Click **New Enquiry** (office and admin). The reference is numbered for you.
2. Give it a **Title** — the one required field — and either choose the customer or, for someone new, enter them as a prospect with their contact details.
3. Add the description, where it came from, an estimated value and the **Salesperson / owner**.
4. Save. The salesperson is told by notification and email; if it is later reassigned, the previous owner is told too.

Inside an enquiry

Click an enquiry to open it. The stage buttons sit in its header and only offer moves that make sense — an enquiry cannot jump from New to Won, and a Won enquiry can only go back to Quoted. Moving to **Survey Booked** asks for the date; moving to **Lost** asks **Why was it lost?** and, optionally, who it was lost to. Every move can carry a note, which is added to the enquiry's notes with the date.

Tab	What it holds
Details	Customer or prospect, site, email, postcode, address, discipline, **Decision due**, **Likelihood (%)** — which drives the weighted forecast — and the salesperson.
Quote	The cost and sell breakdown. Each line has an element, description, quantity, **Unit cost**, **Unit sell**, margin and an **Opt** switch for optional items, which are left out of the totals. **Add Element** and **Save Quote**. The header shows Value, Cost, Margin and Weighted. A line with no cost shows "not costed" rather than a 100% margin. Cost and margin never reach the customer.
Survey	Booking and reading the site survey. See 11.2.
Files	Drawings, the customer's spec, photos. Drop files on the panel or **Choose files**. Images and PDFs preview in place; other files download.
Linked	Other enquiries related to this one.

Convert to Quote

Convert to Quote turns the breakdown into a customer quote — every line except the optional ones — and links the two both ways. The enquiry shows a "Quoted" banner with the quote number. It works once per enquiry. A prospect is set up as a customer with the status Prospect so the quote has somewhere to go.

When the enquiry is marked **Won**, a prospect becomes an active customer, the likelihood goes to 100%, and if an address is held a site is created for them.

11.2 Surveys

A survey is the longer form somebody fills in on site before a quote goes out — the Fire Survey & Design Report or the CCTV Site Survey, 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 pick the **Discipline** — it chooses the form (CCTV → CCTV Site Survey, Fire → Fire Survey & Design Report).
3. Add any survey notes — what to look at, who to ask for — and click **Save Survey**.

That raises a Site Survey job for the surveyor, booked for 09:00 on the day with two hours allowed, with the survey form on it as a required form. They are notified like any job and it appears in their list in the app. Changing the date or surveyor and saving again re-books the same job. **Open job** on the tab takes you to it.

Carrying it out

The surveyor opens the job in the app and works through the form, saving a draft as often as they like. Submitting the form completes the survey job and moves the enquiry to Surveyed. You can also fill in **Surveyed on** yourself, which moves the enquiry on too. The enquiry's Survey tab then shows the job, its status and **View survey form** to read the answers.

What it needs

- The surveyor must be an active app user (Section 2.5). Sales staff who survey are added as Sales app users and use a seat.
- The survey form must be active in Settings → Forms. EM8 supplies the Fire Survey & Design Report as a default.
- The enquiry does not have to be a customer yet. Saving the survey creates the prospect customer and a site from the enquiry address. An existing site at the same address is reused.

> **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

Comms → **Messages** is internal messaging between office and engineers. Click **New Message**, choose who it goes To, add a Subject and Message, and optionally enter a **Job ID** under Link to Job so the conversation stays attached to the work. 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 — including a warning if the account is on credit hold.

- **Known caller** — type a note and click **Save note to account**; it goes on the customer's timeline.
- **Unknown number** — search for the customer and click **Link to customer**. Tick **Save this number to the customer** so they are recognised next time.
- **Dismiss** closes the pop-up.

Comms → **Calls** lists every call with its direction, number, customer, duration, outcome and notes. Filter by **Unlinked**, **Linked** or **Ignored**; unlinked calls have **Link** and **Ignore** buttons.

> **Who gets the pop-up.** The pop-up only appears for people who have a phone extension linked to their EM8 login. Someone who should not be interrupted simply has no extension against their account; the call log is still there for everyone.

12. Reports and the Audit Log

The Reports tab holds Hours (Section 10), Reports, Custom Reports, Response & SLA and the Audit Log. Everyone sees Hours. The rest are admin by default and can be granted to a named person (Section 1.2).

12.1 Reports

Pick a period — This Week, This Month or This Quarter. A row of figures shows Open Jobs, Completed (30d), Revenue (30d), Outstanding, Overdue Invoices and Active Customers. Below them:

- **Jobs by Engineer** — volume per engineer. Useful for workload balance, not just performance.
- **Jobs by Type** — where your work actually comes from: reactive, planned, installation, remedial.
- **Revenue (12 months)** — invoiced value month by month.
- **Top Outstanding Balances** — who owes you, how much, and the oldest amount due.

12.2 Response & SLA

Screen	Answers
Corrective (response SLA)	How quickly you respond to faults. Mean and median for logged to on site, time on site and logged to complete; attended, SLA response met, first-time fix and completed; a time-to-attend chart, response time over 12 months, by priority, by engineer, and the fifteen slowest to attend.
Preventative (BS compliance)	Maintenance interval compliance by discipline. Each system is measured from its last service date against the window for its discipline (for example Fire Alarm 5–7 months) or its own service interval, and counted Compliant, Due soon, Overdue or Unknown. Open a discipline to see the overdue systems. Systems with no last service date are Unknown and not counted against you.
Monthly maintenance stats	For a month: Due, Booked, Left to book, Completed in month, Booked % and Completed %, with a 12-month history, a per-system list (Left to book / Booked, not done / Completed / All due), a discipline filter and **Export**. Each maintained system counts once, in the month it was due. An extracted job still sitting on its 1st-of-month placeholder unassigned is not booked. Completed % only counts visits done by the end of the month.

12.3 Custom Reports

Custom Reports 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, sortable by any column, with a search box. **Export PDF** gives you exactly what is on screen, landscape on your own letterhead.

Group	Reports
Maintenance	Sites overdue their maintenance. Maintenance due in the next N days. Systems under maintenance never serviced. Service dates that do not add up — where the next date does not follow from the last service and the interval.
Charges vs schedules	Charges with no maintenance schedule. Schedules with no charge. Active contracts with no visit frequency. Cancelled contracts with systems still under maintenance.
Contracts	Contracts expiring in the next N days. Annual contract value by customer.

Group	Reports
Jobs	Jobs open longer than N days. Open jobs with no engineer. Completed jobs not yet billed. Jobs awaiting a certificate (with **No certificate needed** per row, Section 4.7). Jobs closed or invoiced in the last N days.
Customers	Customers on credit hold with live work.
Data quality	Systems with no discipline. Contracts with no discipline. Sites with no systems. 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 say.

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 and nobody is going. A schedule with no charge is work with no revenue behind it: engineers are attending and no contract covers it.

> **These two need the disciplines filled in.** Both 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 are how you clear that.

> **Nothing here changes anything.** Every custom report is read-only — apart from No certificate needed, which you choose deliberately. Print them, take them to a meeting, hand them round.

12.4 Audit Log

A record of who changed what and when across EM8 Core. Search by user or record, and filter by Action (create, update, delete, login, view) and by type of record (site, customer, job, job charge, enquiry, invoice, quote, engineer, product, note). Use it to answer "who cancelled that job?" without guesswork. It is also the evidence trail an auditor or a certification body will ask for.

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:** you are not set up as an app user, or have no seat. The office checks Settings → App Users (Section 2.5). If your access has just been changed, sign out and back in — access is set when you sign in.

13.2 Today and Jobs

Engineers open Engineer → Field Service Jobs for assigned work, or My Diary for bookings. Authorised office users use the EM8 Core product area. Within the job workspace, the views include:

- **Today** — a My diary today card with everything booked for you today, 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. Open the engineer's Log Out of Hours Call action, or New job where offered in your job workspace.
2. Choose the Customer, then the Site.
3. Choose the Job type and set the Priority.
4. Describe the fault or the work.
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 (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 forms that belong on this job, with required 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.
Installed Kit	What is recorded at the site — panels, cameras, systems — including linked equipment. Open the site's Fire-safety equipment panel for the live device register and inspection history.
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 and the job goes In Progress.
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. If your times are wrong, tell the office — they can correct any visit (Section 10.2).

Coming back tomorrow?

Use **Left site — return needed** rather than Complete. The clock stops and the job goes On Hold until you come back; a new visit is recorded when you press Arrived again, 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. Required 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.

A submitted form 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. 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).

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 required 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 required checklist left blank.

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.
- **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	Check connectivity and record the error. Retry, then ask the office to check your access or contact support if it persists.
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.

Problem	What it usually is
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.

For FireLog offline visits, preparation and synchronisation, see Section 18. Offline inspection support does not make every Core job action available offline.

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	Job → Assign Engineer, or Diary (Day view) — drag onto an engineer
Engineer sets off	Engineer	App → Job → On my way
Engineer arrives	Engineer	App → Job → Arrived on site
Checklists	Engineer	App → Job → Forms (required ones before Complete)
Extra work spotted	Engineer	App → Job → Quick Quote → customer signs
Work finished	Engineer	App → Job → Complete → sign
Check write-up and charges	Office	Job → Charges tab
Wrong times?	Office	Job → Time → pencil, or Reports → Hours → Every Visit → Edit
Ready to invoice	Office	Job → Send to Billing
Invoice raised	Office	Billing → Jobs to Invoice → Create Invoice, then issue it from Billing → Invoices
Hours to payroll	Office	Reports → Hours → Export Summary

14.2 The monthly maintenance routine

Step	Who	Where
Preview what is due	Admin*	Auto Schedule → 1. Run Extract → Check month
Print the working sheet	Admin*	Run Extract → Print the sheet
Fix systems that produced nothing	Admin	Site → Equipment & cover
Raise the month's jobs	Admin	Run Extract → Run Extract
Plan the work	Office	Diary → Show Unscheduled → drag onto engineers
Engineers are notified	—	Automatic on assignment
Raise the contract invoices	Admin	Billing → Maintenance Invoices → Check month → Raise invoices
Review and send the invoices	Office	Billing → Invoices

* Or anyone who has been given the Auto Schedule feature (Section 1.2). If you plan with Auto Schedule instead of by hand, use it in place of Run Extract for that month — not as well (Section 6.5).

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
App user	Anyone set up to use the EM8 HQ app — an engineer, or a sales user who carries out surveys. Each active one uses an app user seat.
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.
Call type	Your category of work. Drives priority, the forms offered, SLA targets and how the monthly extract files its jobs.
Certificate	The document issued from a completed job saying a system was inspected or commissioned, against a named standard. Filed against the site.
Charge	A part or labour line added to a job, which becomes an invoice line.
Credit hold	A warning on a customer account. Booking work for them needs a reason; Generate visits skips them.
Credit note	An invoice type that reverses all or part of an earlier invoice.
Custom report	A ready-made question in Reports → Custom Reports, answered on screen and exportable as a PDF.
Discipline	The trade a system, contract or job belongs to — Fire Alarm, CCTV, Intruder Alarm, HVAC and so on. Drives forms, certificates, SLA targets and every report that groups by trade.
Extract	The monthly run that raises a job for every maintained system that is due.
Next Service Date	The date a system is next due. The single source for when maintenance is due; it moves on when a planned visit is completed.
Next Invoice Date	The date a contract is next invoiced. It drives the maintenance invoice run and moves on each time.
Placeholder date	The 1st of the month at 09:00, given to newly extracted jobs until they are planned.
PO reference	The customer's purchase order number. Carries from job to invoice.
Pre-charged	A planned maintenance job already paid for under a live contract. Closed rather than invoiced.
Prospect	Someone you are quoting who is not yet a customer. Becomes active when their enquiry is won.

Term	Meaning
Ready to bill	A job the office has sent to Billing, waiting to be invoiced or closed.
Schedule alert	A message saying an engineer is not at the job the diary booked him on to, worked out from their van's tracker. Settings → Alerts.
Site	A physical premises belonging to a customer. Jobs are logged against sites.
SLA	Your promised response and fix times. Set in Settings → Response Times.
Worksheet / job sheet	The printable record of a job — what was found, done and charged.

15. Common questions

An engineer cannot see any jobs.

Check Settings → App Users: they need to be listed, Active, and not marked No seat. Engineers appear there automatically from the portal Engineer role.

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 change does not reach them until they do.

An engineer’s times are wrong.

Open the job → Time tab → pencil on the visit, or Reports → Hours → Every Visit → Edit. Enter the right times and the reason. Any visit can be corrected, flagged or not.

Someone forgot to press "Arrived on site".

Add the visit from the job’s Time tab with Add a visit manually, or use Fix on the Hours tab if it is flagged. Either way, record the reason.

A job will not let me complete it.

Only the assigned engineer can complete a job, and every required form must be submitted first — the message names the form.

Where is the Approve button on a job?

There isn’t one. The office reads the completed job and clicks Send to Billing.

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.

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

Look at the skipped list on the same screen. Usually the system has no Next Service Date, or no live contract covers it. Fix it on the site’s Equipment & cover and click Check month again. An open job of any kind on the system also stops a new one being raised.

I clicked Run Extract twice by mistake.

Nothing has gone wrong. Anything already raised is reported as already raised, not duplicated.

Every visit has two jobs this month.

Both Run Extract and Auto Schedule were used for the same month. Use one or the other (Section 6.5). Undo the Auto Schedule run, or cancel the spare jobs.

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

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

A planned job is not showing PRE-CHARGED.

The system must be linked to its contract (Covered by contract), and the job type’s name must contain Planned or Preventative, or be PPM (Section 2.3).

The maintenance invoice run raised drafts, not sent invoices.

That is deliberate. Review each one and send it as normal.

A contract is billed at the wrong amount or too often.

Open the contract and check the Invoice Cycle and Annual Value. Contracts created or edited in the portal before October 2026 may have saved the wrong cycle (Section 6.1).

Auto Schedule left several jobs unplaced.

The unplaced list gives the reason against each — usually a site with no postcode or no location, or no engineer with capacity nearby. 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.

Your access does not include it. An administrator can switch it on for you under Users → Update User → EM8 Core, without changing your role (Section 1.2). It can take up to 30 minutes, or sign out and back in.

Why can’t I edit a system?

Ask an administrator to check your Customers & Sites management access. Viewing a site does not necessarily allow changes; protected administrator actions remain separate.

We need more app user seats.

Settings → App Users shows your 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, or the address was rejected. No row at all means that customer does not have Auto-send completed job sheet ticked. 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.

Why does Log Job ask for a reason before it will save?

The customer is on credit hold. Give the reason for booking the work, or release the hold from the customer record if it is no longer needed.

Auto Schedule skipped a contract.

Generate visits skips customers on credit hold, contracts with no visits per year, and contracts with no start or next visit date. The skipped list says which.

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

Their van is parked further from the site than the radius allows. Raise Counts as on site within in Settings → Alerts. If the alerts say No vehicle assigned, fix the fleet record in Tracking Guardian.

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

Put 0. It means somebody has decided no visit is due, and its systems are never extracted. Blank means nobody has said yet.

A certificate has gone out with a mistake on it.

Issued certificates are never edited. It is voided with a reason and a replacement issued from the same job.

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.

A report shows sites I know are covered.

The charges-versus-schedules reports match a contract to a system by discipline. Run the two data quality reports and fill in the missing disciplines.

A quote is past its Valid Until date but still says Sent.

Quotes do not expire by themselves. Use Change status → Expired.

I received goods but stock did not go up.

Goods received updates the purchase order only. Adjust the products on Products & Stock with the Stock button.

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.

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

Friday is not one of their working days. Settings → App Users → open them → Working days.

A job needs two days.

Assign it with the total time 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.

Invoices are coming out with the wrong VAT.

VAT is set per line. Check the VAT rate on the products and charges used, and on the invoice lines while it is a draft. If you use Xero, check VAT registered in Settings → Xero.

An invoice has not appeared in Xero.

Xero only sees invoices you have finalised — a draft stays here. If it is finalised and still missing, look at Settings → Xero: the Sync switch may be off, it may be in Waiting to sync, or the page may say Xero needs reconnecting.

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

Payments are picked up within fifteen minutes. After that, check the payment in Xero is against the right invoice — the one whose number matches 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 — unless another live contract on the site covers them. Reactivating the contract does not put them back; an admin edits each system, turns on Under maintenance and sets the dates.

Engineers cannot tap Arrived on site.

Safety questions are probably set to **Required before starting**. The EM8 HQ apps cannot answer them yet, so an engineer on the app is refused every time. Set **When to ask** back to **Ask and record** in **Settings → Safety questions** (Section 21).

The Fire-safety equipment card has disappeared from a site.

Your company does not have FireLog. Since November it is a separate paid product. Fire devices are kept on the site's asset list instead (Section 16).

The Profitability report says Cost incomplete.

Something it needs is missing: a labour cost rate, a finished time entry, or a product cost price. Open the row's breakdown to see what, and fill it in (Section 24.4).

A quote will not send because a line is unpriced.

Quotes made from defects with no estimated price, or from a Plan Guardian plan with no product chosen, have unpriced lines. Price every line and send again.

A job shows Feedback email failed.

The feedback email could not be delivered, usually because the site and customer have no email address. Add one; it is tried again once a day, twice at most.

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.

16. Fire-safety equipment and inspections

This section is for companies that have FireLog as well as EM8 Core. Core provides the customer, site and job workflow; the FireLog register keeps the equipment, inspections, defects and documents.

> **FireLog is a separate product:** Since November 2026 FireLog is no longer included with EM8 Core. Without it, the Fire-safety equipment card on a site and the Site fire logbook tab on a job are hidden, and fire devices are kept with the site's other assets (Section 26). EM8 Core's own defect register (Section 19) is available to everyone.

16.1 Systems and individual devices

A system groups the work under a discipline and holds its maintenance schedule and contract cover. Individual equipment records describe the devices inspected, such as extinguishers, emergency lights, alarm devices, fire doors and sprinkler or suppression equipment. Use the system and device records together; adding a device does not create a maintenance contract or a scheduled visit.

16.2 Adding and maintaining equipment

1. Open the customer’s site and choose Equipment & cover.

2. In Fire-safety equipment, click Add equipment. You do not need to create a FireLog site first.

3. Choose the equipment type, enter its name and location, and complete the relevant device fields. Alarm equipment uses the alarm references; other types show their own specifications.

4. Save. Core prepares or reuses the site logbook and the device appears in the live equipment register.

5. Reopen the device and check its details. Existing inspections and the same equipment identity are retained.

6. If Site records need administrator review appears, ask an administrator to confirm the correct existing site association before retrying. Do not create a second logbook to bypass the warning.

Keep the site identity and address up to date in Core’s Details tab. Surveillance Guardian retains its separate linking controls for monitored CCTV. Existing FireLog associations and inspection history are reused; normal equipment work does not require unlinking and relinking FireLog.

16.3 Equipment specifications

Choose the correct type before entering specifications. Extinguishers, emergency lights, fire doors, sprinklers and suppression systems have relevant detail fields. Alarm loop and address fields apply to alarm equipment. Check saved details by reopening the device. Changing the equipment type can clear specifications that no longer apply.

A reference test date is descriptive information. It does not create a completed inspection, record a pass or advance a service schedule.

16.4 NFC and QR identification

1. Create or identify the device in the Core site's Fire-safety equipment register while connected.

2. In EM8 HQ, open the existing FireLog365 mobile equipment screen for that same site and device.

3. Use the device's NFC write action on a supported phone and follow the phone's instructions to write the tag.

4. Scan the tag again and check that it opens the intended device and site before fixing it in place.

5. For an offline inspection, download the site and its equipment while online before leaving coverage. Only downloaded equipment can be matched offline.

Physical tag writing remains a mobile action. The Core browser screen does not write NFC tags. If the device is missing, check the site association and refresh rather than creating a duplicate.

16.5 Inspection evidence on a job

1. Complete the site inspection using the existing FireLog mobile or portal workflow.

2. If working offline, reconnect and confirm the inspection has synchronised before expecting to find it in Core.

3. Open the Core job for the same site and its fire-safety inspection view.

4. Under Inspection evidence for this job, find the correct visit and click Link inspection.

5. Check that the row now says Linked. The results, defects and documents stay in the original logbook.

6. Complete and review the Core job through its normal workflow. Linking inspection evidence does not complete the job for you.

Use the correct job at the same site. An inspection already associated with another job cannot be reassigned by simply linking it again. Inspection evidence stays in the logbook; it is not copied into a second inspection history.

16.6 Defects and corrective jobs

1. Open the site's Fire-safety equipment panel and choose Defects & corrective jobs.

2. Find the defect, check its severity and click Create corrective job. If a linked job already exists, open that job instead.

3. Assign the job, carry out the repair and complete the job with the required evidence.

4. Return to the defect and click Submit repair evidence. Describe the repair and verification evidence.

5. Submit. The defect moves to Awaiting verification.

6. An authorised verifier reviews the evidence and verifies and closes the defect through the logbook workflow.

Completing or invoicing a corrective job does not automatically close the defect. Do not treat Awaiting verification as Closed.

16.7 Inspections and certificates

Inspecting equipment, completing a Core job and issuing a certificate are separate actions. Use the logbook's review and document controls for FireLog evidence and controlled documents. Use the Core job certificate workflow in Section 4.7 for job certificates. Check the issued document and its status before sharing it; a saved test date or a completed job is not a substitute for the required inspection and verification.

17. Customer online access

Give an installer’s customer access from their Core customer record. This creates a scoped end-customer account and does not give them the installer’s working screens or staff permissions.

17.1 Enable access

1. Open the Core customer record and select Online access / Users.

2. Click Enable online access and enter the named person’s name and email address.

3. Choose Areas to share. Jobs, assets, Fire logbook and certificates are selected by default; choose invoices and quotes where appropriate.

4. Keep All this customer’s sites selected, including future sites, or clear it and select the permitted sites.

5. Save. Copy the activation link and share it securely with that person. It expires after 48 hours and works once; no invitation email is sent automatically.

6. The customer sets their password and uses the Customer sign-in address shown on the page.

7. Use the user list to check activation, sites and last sign-in. Edit access, Reset password or Revoke access as needed.

17.2 What the customer can see

Share jobs and completed job sheets, issued invoices and quotes, assets, the Fire logbook and certificates according to the person’s selected areas and sites. Draft financial documents and internal notes are withheld. The current customer workspace is read-only: online payment, quote acceptance and customer inspection submission are not actions in this workspace. Separately issued quote acceptance links retain their own workflow.

17.3 Maintain and revoke access

The Online access / Users list shows the person, email, permitted areas, sites, activation status and last sign-in. Edit access changes their grants; Revoke access disables the account. Existing sessions are signed out immediately when access changes. Re-enable access when appropriate.

Use New activation link for an account awaiting activation, or Reset password for an active account. A replacement link signs out existing sessions and replaces the previous activation or reset route. Share the new link securely with the named customer. The link works once and expires after 48 hours.

17.4 When a customer cannot see a record

Check the customer account is enabled and activated, that the correct site and content area are shared, and that financial documents have been issued. Give them the Customer sign-in address displayed on that customer’s access page. A general portal Customer role is not a substitute for a Core customer access grant.

18. Mobile inspections and offline working

Prepare FireLog site data while connected, record the inspection in the mobile workspace and confirm synchronisation afterwards. A locally saved or queued visit is not yet a confirmed server record.

18.1 Prepare before losing coverage

1. While connected, open the site and download its equipment and current inspection forms for offline work.

2. Open or create the contractor visit in the mobile workspace. Confirm that the site and required equipment are available before losing coverage.

3. Record equipment results, notes and required form answers. Scan downloaded equipment tags where useful and capture the required evidence.

4. Complete the required answers and queue the completed visit for synchronisation.

5. Reconnect and open the app. Check its sync status and retry any failed visit. On iPhone, use Sync Completed Visits if needed and keep the app open while it uploads.

6. Confirm the completed visit and its evidence appear in the portal. If a form version has changed, review the latest form and retained answers before retrying.

18.2 What still needs a connection

Creating or editing equipment, downloading new site data and documents, and submitting review or defect changes need connectivity in the supported workflows. FireLog offline inspection support does not imply offline creation of Core jobs or identical offline vehicle-check behaviour on iPhone and Android.

18.3 If synchronisation fails

Keep the local evidence. Check connectivity and sign in as the account that created the visit. Read the error and retry from the mobile workspace. On iPhone, uploads are retried while the app is active; uploading after the app closes is not guaranteed.

If the inspection form has changed, download the latest site data and review the retained answers against the latest form version before completing and retrying. Do not discard a queued inspection to hide the error. Ask support for help if it remains blocked, providing the site, visit and error without sharing passwords.

18.4 Confirm the result

Open the completed visit in the portal and check equipment results, answers, photos and signatures. Then link it to the appropriate Core job if required. Complete the Core job separately and keep routine checks separate from contracted maintenance completion.

19. Defects, false alarms and compliance

Every EM8 Core company now has a defect register, a false alarm log and a compliance score for each site. These are EM8 Core's own, separate from FireLog's defect list in Section 16.

19.1 Where to find them

- **Customers → Defects** — the Defect register for every site.
- **Customers → Compliance** — every site's compliance score, worst first.
- Site → **Compliance** — the site's score, its defects and its false alarms.
- Job → **Defects** — the defects at the job's site.

19.2 Raising a defect

1. Click **Raise defect** on the Defect register or the site's Compliance tab.
2. Choose the **Customer** and **Site** and describe the **Defect**.
3. Set the **Severity**: Critical, Major, Minor or Advisory.
4. Add the **Location**, the **System** if known, **Details** and the **Recommended action**.
5. Enter an **Estimated price (£)**. It is used as the price when the defect is quoted. Save.

Filter the register by Open, Resolved, Void or All, and by severity.

19.3 Quoting and remedial jobs

Tick defects for one site at a time. **Quote selected** makes a draft quote with a line per defect, priced from its estimate; review and send it from **Sales → Quotes**. **Remedial job** makes one job to fix them without a quote.

The **Stage** column follows the work: Open, Quoted, Quote declined or Quote accepted, Remedial booked, **Work done — sign off**, Resolved or Void.

> **Tip:** A defect with no estimated price goes onto the quote unpriced, and you are warned. A quote with unpriced lines cannot be sent until every line has a price.

19.4 Signing off, voiding and reopening

From the row's ··· menu: **Sign off as resolved** asks how it was resolved; **Void (raised in error)** asks for a reason; **Reopen** puts it back on the list.

Action	Who can do it
Raise, edit, sign off	Engineers, office staff and admins
Void, reopen, remedial job	Office staff and admins
Quote selected	Anyone who can create quotes

Engineers can now sign a defect off themselves. Whoever signs it off is recorded against it.

19.5 False alarms

1. Open the site's **Compliance** tab and click **Record false alarm**.
2. Enter **When** and the **Cause**: Unwanted (cooking, steam, dust), Equipment fault, Malicious, Good intent or Cause not known.
3. Add the **Device**, **Zone**, **What happened** and **Action taken**.

4. Tick **Fire and rescue service attended** if they came. Save.

Engineers, office staff and admins can record false alarms. Only the office and admins can delete one.

19.6 The compliance score

Each site starts at 100 and loses points for systems that are overdue, nearly due or never serviced, for open defects (critical 20, major 10, minor 3) and for false alarms in the last 12 months. Every deduction is listed as a reason.

Band	Score
Good	85 or more
Needs attention	60 to 84
At risk	Below 60
Not scored	Nothing to score yet

A site can never be Good while it has a critical defect or an overdue system. **Customers → Compliance** shows the average score, how many sites are in each band, and each site's reasons.

Customers can see their own sites' scores, open defects and false alarms if you share **Compliance** with them (Section 17). They never see prices, notes or staff names.

20. Quality

The **Quality** tab keeps the records an auditor asks for. It is for office staff and admins by default; an admin can give it to others in per-person access (Section 1.2).

20.1 Audit KPIs

Choose 3 months, 12 months or 3 years. The page shows complaints (received, still open, past response date, resolved on time, average days to resolve, customer satisfied), test equipment (instruments, overdue, due in 30 days, quarantined, no calibration date), defects (raised, resolved, average days to close, open critical, open over 30 days) and jobs completed by their target date.

20.2 Complaints

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

A complaint goes Open → Investigating → Resolved → Closed, and cannot be closed without a corrective action. The office is alerted the morning after a complaint misses its response date.

20.3 Test equipment and calibration

1. Click **Add instrument**. Enter the name, type, make, model, serial number, asset tag and **Assigned engineer**.
2. Set **Calibrate every (months)**, **Last calibrated** and **Calibration due**. Save.
3. After each calibration, click **Record calibration**: the date, **Next due**, the result (Pass, Adjusted and passed, or Fail) and the certificate number.

A **Fail (quarantine it)** result takes the instrument out of use. Entering an older certificate later does not move its dates. Each instrument shows In date, Due soon, Overdue, No date or Retired.

Reminders go weekly from 30 days before the due date, and on the day, to the office and the assigned engineer. **What reminders go today?** shows who will be told.

20.4 Safety checks

Quality → Safety checks lists engineers' answers to the safety questions (Section 21), unsafe answers first. Filter by engineer or show unsafe answers only.

21. Safety questions

Ask engineers a few yes/no questions before they start work: PPE, RAMS, permits and so on. It is off until an admin switches it on in **Settings → Safety questions**.

21.1 Setting it up

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

> **Important:** The EM8 HQ apps cannot answer safety questions yet. Under **Required before starting**, an engineer on the app cannot clock on at all. Use **Ask and record** until the apps are updated.

21.2 What the engineer sees

The questions appear when the engineer presses **Arrived on site**, not **On my way**: travelling is not work. In **Ask and record** they can skip; under **Required** they cannot start until they have answered safely.

An unsafe answer tells the office straight away. If it is set to stop work, the engineer cannot start until the question is answered again safely.

21.3 Records

Answers are kept on the job's **Time** tab under **Safety checks on this job**, marked Safe, **Unsafe — work stopped** or **Unsafe — office told**. **Quality → Safety checks** is the report. Removing the last question switches the feature off.

22. More certificates

Section 4.7 explains issuing a certificate from a job. These are the additions.

22.1 New certificate types

As well as maintenance and installation, you can issue **design**, **commissioning**, **acceptance** and **verification** certificates. Choose the wording under **Certificate type and standard**; each type asks its own questions.

Type	Extra questions
Design	Design basis — category or grade and purpose; design variations agreed
Commissioning	Commissioning tests carried out and results; items outstanding at commissioning
Acceptance	Items outstanding at acceptance. Needs the client's signature.
Verification	Scope of verification; findings

Design, acceptance and verification certificates leave out the testing fields. The starting wording for the new types should be checked by your company before first use.

22.2 Client sign-off

Under **Client sign-off** choose **No client sign-off**, **Use the job's customer signature**, or **Client signs now** (client name, position and signature drawn on screen). The client's signature is kept separately from the engineer's statement. An acceptance certificate cannot be issued without it.

22.3 Accreditation

In **Settings → Company Profile → Accreditation on certificates**, enter your **Third-party certification scheme** (for example BAFE SP203-1, NSI Gold or SSAIB) and **Registration number**, and **Upload badge** (PNG or JPEG). They print on every certificate.

22.4 A completed form as a certificate

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

The form's answers are frozen into the certificate, so editing the form later never changes a certificate already issued.

23. Following up with customers

Four features that follow up for you. All except follow-ups are off until an admin switches them on.

23.1 Follow-ups when a job is finished

Engineers choose a follow-up in the app when they complete a job. The office can add one afterwards from the job's **Details** tab → **Follow-ups** → **Add follow-up**: choose the **Outcome**, add **Details** and click **Raise**.

Outcome	What it raises
Critical fail	A draft quote
Quote required	A draft quote
Return required	A new job for the same engineer
Parts required	A new job for the same engineer
No access	A new unassigned job to revisit

Each outcome can be used once per job. A follow-up never stops a job completing: if one could not be raised it shows **Not raised — do it by hand**. A follow-up job does not move the maintenance date on a second time.

23.2 Automatic quote chasing

Settings → Alerts → Automatic quote chasing. Choose up to six days after the quote was first emailed (3, 7 and 14 to start with) and an optional opening line, then **Save schedule**. **What would be sent now?** checks first.

Each reminder attaches the quote with a fresh **Review & Accept** link, at most once a day per quote. Chasing stops when the quote is signed, accepted, declined or expires. Each quote's **Automatic chasing** card shows the next reminder and has **Pause** and **Resume**.

23.3 Service-due emails

Settings → Service Reminders. Set how many days before the service is due to email (30 to start with), use **Preview who would be emailed today** (it sends nothing), then switch it on. **Sent recently** shows what went out.

Only maintained systems on an active contract are included. One email per site lists every system due there, in your company's name, to the site's email or the customer's. Systems already booked with an engineer and a date, and overdue systems, are skipped. Each system is emailed once per due date.

23.4 Customer feedback

Settings → Customer feedback. Choose **Send after** (2 hours to start with), whether to skip customers asked recently, an opening line, your **Google review link** and the rating that asks for a review, and **Alert the office when the rating is** (2 or lower to start with). **Who would be asked now?** checks first.

Customers get “How did we do?” with five one-tap ratings: no login, valid for 30 days, and an optional comment. Each job is asked about once, by email to the site contact, the site, or the customer. A low rating alerts the office by notification and email.

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

24. Rates, costs and profitability

24.1 Labour rates

In **Settings → Labour Rates** an admin adds rates (**Add rate**: a name and a price **Per hour (£, ex VAT)**) and marks one with **Make standard**.

24.2 A customer's own prices

On the customer's **Rates** tab, fill in **This customer pays** for any rate and click **Save customer rates**. A blank price means the standard rate. Office staff and above can set these.

24.3 Where rates are used

A rate fills in the price when you add labour: the **Labour rate** on a job's **Add Charge** (quantity is hours), **Labour** on an invoice line, and **Add labour…** on a quote. Nothing already charged is repriced.

24.4 Profitability

First an admin sets **Settings → Labour costs**: a company cost per hour and, where it differs, each engineer's. The **Hourly rate on profile** column is shown for reference and is not used.

Reports → Profitability shows **Revenue (net)**, **Cost** and **Margin** for jobs or contracts over a period, with a breakdown and CSV export. Each job also has a **Profit** card. Revenue comes from issued invoices, then drafts, then charges not yet invoiced; contract visits are reported with their contract.

Cost is engineers' time at their cost rate, parts at their cost price, and purchase orders for the job (Section 25). **Cost incomplete** means something is missing (a cost rate, a finished time entry, or a part's cost price), so the real margin is lower than shown. Unknown amounts show “—”, never £0.

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

25. Purchase orders and deposits

25.1 A purchase order for a job

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

The job's **Purchase orders** card shows each PO's cost for this job and the total **Counted as job cost**. Draft and cancelled POs are greyed out and not counted.

25.2 Stock orders split across jobs

On a PO, **Job (whole PO)** makes every line a cost of that job, unless a line names its own job. Each line can also be **No job (stock)**. Use **Change jobs…** on a saved PO at any status.

Pick the product on each PO line: the profit report then knows a part charged on the job was bought on the PO, and does not count it twice.

25.3 Deposits when a quote becomes a job

When you **Convert to Job**, tick **Raise a deposit / pre-work invoice?** and set **Deposit (% of the quote)** (50% to start with). The deposit is saved as a draft invoice to check and send from **Billing → Invoices**. The job's **Charges** tab lists its deposits, and the final invoice deducts them automatically.

26. Device lists on forms

A table on a form can be linked to the site's asset list, so engineers pick devices instead of typing them, and new devices are added to the site for you.

26.1 Setting up a form

In **Settings → Forms**, on a table field, tick **These rows are site assets**. The table needs a column for the device type or name; columns called Location, Zone, Loop, Address, Make, Model and Serial are filled in too. A job form whose table has a type column and a location column is linked automatically; untick the box to stop that.

26.2 On the job

The engineer clicks **Select asset** to pick devices already on the site, or scans the device's NFC tag. **Add new** adds a row for a device that isn't listed. When the form is completed, typed-in devices are saved to the site's assets, and the same device is not added twice.

If your company also has FireLog, fire devices from a form go into the site's fire logbook instead.

26.3 NFC tags

Tags can now be written for any device on the site's asset list, from the EM8 HQ app; the browser cannot write them. **Equipment & cover** marks devices that have a tag with a green **NFC** label.

27. Plan Guardian with EM8 Core

If you have Plan Guardian as well as EM8 Core, plans and Core sites work together. Everything uses the plan's saved drawing.

27.1 Linking a plan to a site

Open the plan and switch to the **EM8 Core** view. Under **EM8 Core site** choose the site, unless it was found through the linked portal site. The device table links each device to the site's assets: **Link an existing asset**, **Create asset**, **Create assets for selected** or **Unlink**.

27.2 A quote from a plan

Click **Create quote** (or for selected devices), choose a product for each device type, add **Valid until** and notes if needed, and click **Create draft quote**. A type with no product becomes an **Unpriced** line, never £0, and the quote cannot be sent until it is priced. Your product choices are remembered.

27.3 Plans on a job

A job at a site with plans has a **Plans** tab. Each device is coloured by this visit's result: Failed, Passed, Seen (no pass/fail), Not yet tested on this visit, or Not linked to an asset. Click a device for its asset and history.

27.4 Zone chart and cause and effect

The **Zone chart & C&E** view has the zone chart (**Zone chart PDF**) and a **Cause and effect** grid: click a cell for X (operates immediately) or D (operates after a delay), add rows and columns, and **Save matrix**. Only the current revision can be edited. Both print with the plan PDF.