

ESM Client Introduction & Training

Part 1 - Setup and Support Materials

1.0 ESM Training Materials

- PDF Manuals
- Walkthrough Guides

2.0 ESM Setup

- i) General Background
 - (a) Engineer Groups (modify scripted)
 - (b) Engineers
 - (c) Route Numbers
 - (d) Elevator Types (modify scripted)
 - (e) Contract Types (modify scripted)
 - (f) Users & Menu
 - (g) Accounts Integration
 - (h) SMS Breakdown Messaging
 - (i) Reports - Local Customisation
- ii) Client Specific - spreadsheet data import
 - (a) Clients (from Accounts)
 - (b) Sites
 - (c) Elevators
 - (d) Contracts

Part 2 - Core User

3.0 Contracts

- Enter Contracts
- Invoice Contracts
- Post to Accounts
- Key Reports

4.0 Service

- Service Scheduling
- Reporting
- Key Reports

5.0 Breakdowns

- Log Call
- Reporting
- Close Call
- Invoicing
- Post to Accounts
- Key Reports

- 6.0 Repairs**
- Quotation
 - Order
 - Invoice
 - Post to Accounts
 - Key Reports

Part 3 - Advanced User

- 7.0 ESM-Mobile (PDA)**
- Setup
 - Login & Summary Pages
 - Breakdown Walkthrough
 - Breakdown Timesheet
 - Service Reporting
 - Repair Reporting

- 8.0 Construction**
- Setup
 - BOMs
 - Surveys, Specifications, Risk Assessments, Method Statements
 - Create/Build Quote
 - Construction Orders
 - Project Planning & Cost Reviews
 - Client Billing (Applications, Invoicing & VOs)
 - Post To Accounts

- 9.0 Purchase Order Processing**
- Setup
 - Create PO
 - Receive Materials/ Supplier Invoicing
 - Post to Accounts

- 10.0 Job Costing**
- Setup
 - Timesheets
 - Job Analysis

- 11.0 *InsightApps* Management Dashboards**
- KPIs
 - Operations
 - Analysis