

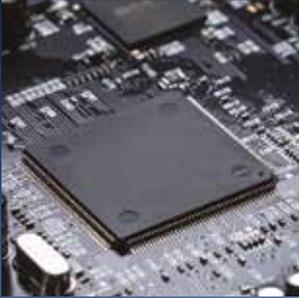


# EFACS E/8

THE COMPLETE BUSINESS SOLUTION



EXEL®



## AI-Enabled ERP Software

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**Exel Computer Systems plc** has been a British author, provider and implementer of comprehensive business solutions for manufacturing companies and service providers since 1985. All written in-house, from the ground up – something that is very rare in this market today.

**Exel's extensive history** in the market has enabled its implementation team to amass, on average, over 18 years' experience each. Exel's customers, of which many have been clients for over 20 years, find the breadth and depth of this knowledge, across numerous industries, to be an invaluable resource.

**EFACS E/8** is a modern, comprehensive and flexible browser-based business solution. Built using the latest AI-enabled technology EFACS E/8 can be run either in the cloud or on-premises. It has a component structure that enables an economic and precise fit to the most demanding of business requirements across many different industries and size of business.

**The underlying architecture** of the EFACS E/8 system, along with the integral Customisation Toolkit and Workflow features, provide Exel's customers with a solution that will grow and adapt as their business requirements change. It is this ability to change and evolve, without having to go back to the software supplier, that allows Exel's customers to future-proof their investment.

**Whatever your business**, whatever your size and wherever you are in the world, EFACS E/8 is the business solution for you.

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## EFACS E/8 for Your Industry

EFACS E/8 is a comprehensive and flexible business solution.

**The range of business functions** includes finance, sales, purchasing, stock, manufacturing, field service, contract and project control, customer relationship management, planning, workflow, document management, e-commerce, executive information, business intelligence and touchscreen applications.



**EFACS E/8** is designed to meet the needs of a wide range of businesses in many sectors, including:

- **AEROSPACE**
- **AUTOMOTIVE**
- **CHEMICALS**
- **CONSTRUCTION**
- **COSMETICS**
- **ELECTRONICS**
- **FABRICATED PRODUCTS**
- **FOOD INDUSTRY**
- **FORGING AND PRESS WORK**
- **FURNITURE**
- **GENERAL ENGINEERING**
- **GLASS**
- **JEWELLERY**
- **MEDICAL**
- **PACKAGING**
- **PAPER AND PULP**
- **PLASTICS**
- **PRECISION ENGINEERING**
- **RUBBER**
- **TEXTILES**
- **TOOLING**
- **VALVES**

With hundreds of successful implementations, and thousands of users, EFACS is a proven product helping to run some of the world's best known companies.

## Fit to Your Business

Companies require that their IT systems are both comprehensive and can be adjusted at relatively low cost to fit their precise needs.

This is not only in the case of initial implementation but also in the longer term, as business circumstances and IT needs will vary over time. The IT system should be adaptable to fit changing circumstances, without incurring significant time and cost penalties for the company. Due to its Variable Component Architecture EFACS E/8 can be easily adapted to fit your exact requirements.



## IT Integration

**EFACS E/8** is a fully integrated browser based business solution delivering end-to-end, industry specific ERP management and operation. EFACS E/8 is authored by Exel Computer Systems plc, who have over 35 years of experience in delivering innovative software and implementation services to companies around the world. Designed to grow as your business grows, EFACS E/8 includes a fully integrated customisation toolkit that empowers you to take control of the software and future-proof your investment.

**EFACS E/8** employs the latest underlying technology. It can easily and seamlessly communicate with other systems via industry standard protocols. Exel Computer Systems plc offer a single point of accountability.

This, together with being authors of the software, allows our customers to achieve business excellence, a rapid return on investment and low total cost of ownership.

**“As a system, EFACS E/8 ticked a lot of boxes for us. A large UK customer base, an active user group, a rich set of functionality – and ample evidence that the product was being continually upgraded and improved. Plus, it was British, developed for British businesses. Even better, EFACS E/8 was readily customisable, with Exel providing tools to do this.”**

Wye Cylinder Engineering

## SYSTEM-WIDE FEATURES

WORKFLOW	TOUCHSCREEN SOLUTIONS	DOCUMENT MANAGEMENT	MOBILE SOLUTIONS	AUDIT TRAIL
<b>PRODUCT DEFINITION P.18</b> <hr/> PARTS MASTER <hr/> ENGINEERING CHANGE CONTROL <hr/> BILL OF MATERIALS <hr/> ROUTING <hr/> RESOURCES <hr/> HAZARDOUS GOODS	<b>MATERIAL MANAGEMENT P.20</b> <hr/> ITTs <hr/> TENDERS <hr/> REQUISITIONS <hr/> PURCHASE ORDER PROCESSING <hr/> VENDOR RATING <hr/> STOCK MANAGEMENT <hr/> STOCK TAKING <hr/> WORK IN PROGRESS <hr/> DATA COLLECTION <hr/> TIME & ATTENDANCE <hr/> QUALITY CONFORMANCE	<b>PLANNING P.28</b> <hr/> MRP <hr/> MPS <hr/> CAPACITY PLANNING	<b>MOBILE SOLUTIONS P.13</b> <hr/> SHOP FLOOR <hr/> WAREHOUSE <hr/> TIME MANAGEMENT <hr/> SERVICE ENGINEERS <hr/> FIELD SALES	



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BROADCASTING

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PURCHASE INVOICE  
SCANNING

CASH BOOK

FIXED ASSETS

PRODUCT COSTING

JOB COSTING



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# Service Oriented Architecture

Service Oriented Architecture (SOA) allows integration of the ERP business system with other systems within the organisation and with external partners.

**EFACS E/8** provides a web service for use by third party software to interrogate and update data within the EFACS system. By utilising SOA users are able to query and insert records into the EFACS system.

An example use for this technology would be a company website displaying available engineer time slots and then allowing the end user to book an engineer to carry out a visit.

**SOA enables** streamlining of your business processes and facilitates increased interaction between you and your clients or suppliers.



## Workflow

The EFACS E/8 Workflow module automates business procedures and improves operational efficiency.

Workflow is especially valuable when the volume of administrative work is high, or where internal organisational procedures require multiple sign-offs, such as approvals in the purchasing process.



**The integration** of EFACS E/8 with mail and task features of standard office automation products results in a control mechanism that helps to ensure that the right work is done at the correct time, by the right people and in proper sequence.

**The EFACS E/8 Workflow** system may be configured to send information to users triggered by events within EFACS E/8. The receipt of a purchase order may cause an email to be sent to the accounts department with the details of the order. A staff member within that department can then accept or reject the order by selecting an option from a form in the message. Multiple messages may be sent to a number of recipients, showing full information or selected details as appropriate.

**Powerful time monitoring** and alerting procedures are built into each workflow process. If actions are not carried out in a timely manner, escalation messages are automatically generated and sent to relevant staff. These features help to ensure that customer promises are met, allowing for key people being on holiday or overloaded, and avoiding cumbersome manual procedures.

**The combination** of Workflow and Document Management provides a powerful document review system. Documents can be passed from one user to the next, with each user making changes if necessary, before passing on to the next user.

**A full history** of user changes is maintained using the Document Management revision history feature.

**Properly incorporated** into the day-to-day business of the company, EFACS E/8 Workflow delivers substantial business benefits.

## Business Process Automation

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EFACS E/8 Business Process Automation (BPA) allows the user to automate business processes using powerful and intuitive business flow diagrams.

**A BPA process** is initiated from an EFACS action or data activity, and automates the process of generating a series of consequent actions.

For example, in a multi-site situation where an internal purchase order is placed on a second company, the corresponding sales order may be automatically generated in the second company's system.



## Document Management

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The retention, storage and accessibility of information within a business is critical to its efficiency, and will ultimately determine the speed at which an organisation responds to demands placed upon it. Today, organisations need to effectively manage an expanding array of document types, from letters, memos and emails through to specifications, designs, CAD drawings and other specialised documents.

### **The Document Management module**

within EFACS E/8 is a repository that provides quick, easy and efficient access to information in a secure, controlled and traceable manner.

Support is available for a wide range of formats, such as Word, Excel, PDF, video, sound, images (JPG, MPG, GIF, etc.) and CAD formats such as DXF, DWG – in fact all normal formats supported within a browser environment.

### **Document Attributes**

Attributes may be added to documents to enforce filing procedures. These user defined attributes promote good administrative disciplines and facilitates subsequent search and retrieval.

**For example,** a document type may be created to capture incoming orders. Mandatory attributes of Customer, Sales Order and Sender may be defined, with an optional attribute of Project.

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## Multiple References

EFACS Document Management adopts the 'attach once, reference many' approach, which allows any document to be referenced against any number of the same or different records.

For example, one document can be referenced against a collection of parts as well as customers, suppliers and any other type of record that is specified as an associated document reference.

**The Multiple References** tab allows users to view each document and what it has been referenced to. This information is displayed in an easy-to-view list, which can be filtered and searched against.

## Document Revisions

A number of revisions of a document may be retained. EFACS allows the history of changes to be reviewed through user-friendly previews of versions of the document.

**The ability of EFACS E/8** to comprehensively store and edit documentation in a standard and centralised manner encourages collaboration in an organisation, within predefined, auditable business rules.

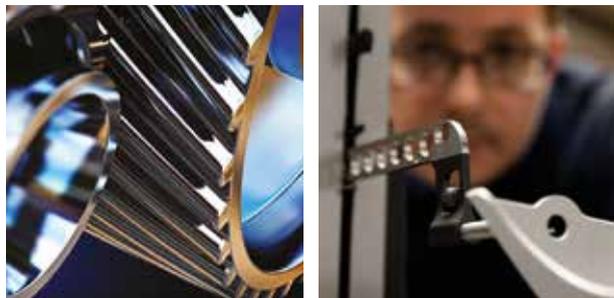
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## Integration Capabilities

Direct links with the EFACS Workflow module allows automatic document filing and document approval via tasks containing embedded documents, which can be passed around individuals within a company.

**Externally**, customers and suppliers can be sent all relevant information through Communications Tracking, automatically picking up the email to be sent and attaching the relevant documents and files associated to it.

**Both incoming and outgoing** emails are tracked and stored, whilst any associated attachments are stored as documents.



## Customisation Toolkit

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EFACS combines the power and stability of a standard off-the-shelf package with the important added benefit of a system that can be tailored to meet the precise needs of the company.

**The Customisation Toolkit** is a development tool that enables specific staff to customise functionality of core application software, without the need to develop and maintain complex source code.

**The Toolkit** gives the ability to create new applications, and may also be used to enhance existing functionality.

**Enabling seamless integration** of system changes, the Toolkit has its own Integrated Development Environment, or IDE, that can simplify software generation. The IDE provides a sophisticated object browser that allows perusal of the object system that EFACS is built upon. Toolkit developments have the same look and feel as the main EFACS system.

**The Toolkit** is a powerful system tool, which allows menus, forms, toolbars and grids to be tailored so that the core functionality of EFACS can be extended without amendment of existing applications. Standard database tables can be extended throughout the EFACS E/8 system using a facility called 'Custom Columns'.

The underlying EFACS database structure remains unchanged, ensuring that the integrity of the system is not compromised.

## Business Intelligence and Reporting

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The EFACS Business Intelligence module is a solution for creating highly formatted reports and operational dashboards.

**In order to** present real-time, personalised and pertinent information to management and staff, EFACS E/8 embeds KPIs and reporting into menu dashboards. These dashboards can display either BIRT reports or Microsoft Power BI reports.

**Based on** their permissions and roles, users can select different dashboard information to display within different modules in the system. Reports allow full drill-down to source data for increased efficiency of system navigation.

**Graphical dashboards** provide eye-catching, modern visualisations to reflect different types of data, allowing users to easily identify anomalies and early warning signals, enabling them to react in a timely manner. Sales staff are able to gain insights into up-selling and cross-selling opportunities by mining customer data.

## Multi-Language

EFACS E/8 has multi-lingual capabilities, including support for Unicode (double-byte) languages, such as Chinese and Japanese.

**Multiple languages** may be run simultaneously on the same server allowing international organisations to run a single system across several countries.

## Business Terminology

EFACS E/8 can accommodate specific terminology used by the company.

**For example**, screen field labels may be modified to change the standard EFACS term 'Part number', to use the term 'Product code', if preferred.



## Mobile Solutions

EFACS E/8 supports mobile devices for use in the factory/warehouse, on the road or out in the field. Handheld and tablet devices operate in real-time, allowing access to the latest data whilst mobile.

### Mobile Shop Floor & Warehouse Data Management

EFACS E/8 supports handheld, tablet and wall-mounted devices with integrated barcode readers to allow access/updates to the latest data whilst mobile, on the shop floor or in a warehouse.

**The range of** Mobile Shop Floor & Warehouse applications includes:

- DELIVERY PICKING
- STOCK TAKING
- WORKS LIST
- WIP BOOKING
- TIME & ATTENDANCE
- STOCK MOVEMENTS
- STOCK RECEIPT
- STOCK ISSUE
- STOCK ENQUIRY
- STOCK QA
- WORKS ORDER
- RECEIPT
- KIT PICKING

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### Stock Taking

One example where mobile devices can provide significant advantages is when carrying out stock takes. Warehouse clerks may enter stock counts in real-time, directly as the count is made, using a handheld device.

### Time Management

Mobile devices can be used to monitor attendance with the use of finger print scanners or barcodes which each operator can use for clocking on and off.

### Service Engineers

Mobile Service Engineers can be provided with case information and visit schedules, and can provide real-time updates on their progress and work completed.

### Field Sales

Remote sales staff can access customer and prospect information, and update that information whilst mobile.

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## Audit Trail

The EFACS E/8 Audit Trail module enables companies to log, track and investigate data that is changed within the business system.

The Audit Trail functionality provides a precise, detailed, and easy to use method of recording when any information within EFACS E/8 is changed, who changed it, and how it was changed.

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**Tracing data** modifications is integral to the smooth operation of a business database. There must be tight controls in place to ensure compliance with a host of business legislation requiring precise auditing of data.

**The benefits** of the EFACS E/8 Audit Trail go beyond legislation compliance however, as it allows problems to be tracked down and inconsistencies highlighted.

**Selected users** can view Audit Trails at any time or be alerted to data issues via Workflow. You are able to configure user settings, enabling you to choose the data entities that are of relevance to a specific user.

**EFACS E/8** uses a separate database to store Audit Trail data, which allows it to be backed up separately from your main database, this eradicates an increase in the time it takes to back up your main database.

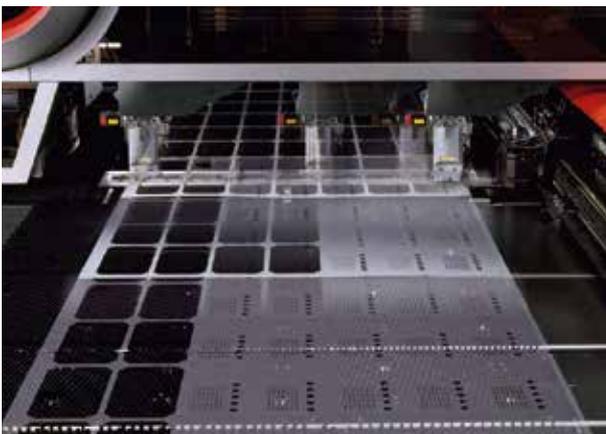
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## WHAT IS YOUR MANUFACTURING METHODOLOGY?

EFACS E/8 is suitable for a variety of manufacturing methodologies:

- **MAKE/ENGINEER-TO-ORDER**
- **CONFIGURE-TO-ORDER**
- **ASSEMBLE/FINISH-TO-ORDER**
- **MAKE-TO-STOCK**
- **MAKE-TO-CONTRACT/PROJECT**

The company may use EFACS E/8 successfully in managing a business using any one, or any combination of these methodologies.



### Make/Engineer-to-Order

Companies that produce components, assemblies or sub-assemblies to order, will receive significant benefits from powerful EFACS E/8 functionality.

**Bill of materials** and routing information may be generated with cost roll-ups to provide accurate pricing and product build information to customers and prospects.

**On acceptance** of a quotation, EFACS E/8 can create back-to-back sales orders and nested works orders, streamlining the manufacturing process.

**Prospect details**, quotation bill of materials and quotation routings are all identified separately to the live manufacturing data. Information is automatically transferred when the enquiry becomes a firm order.

**Contract review facilities** enable comprehensive management of sales, production, bills of materials and routings.

**The comprehensive** EFACS E/8 planning module can schedule production, including material management, ensuring that long lead-time materials and supplies can be acquired on time and to budget.

**Finite and infinite scheduling** will pinpoint bottlenecks and indicate the resources required to satisfy demand in the most efficient manner.

## Configure-to-Order

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It is often not possible to predefine bills of materials and routings for all the different variations of a particular product range, due to the large number of possible variations.

Companies that manufacture a wide range of similar products can take advantage of the EFACS E/8 Product Configurator.

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**The EFACS E/8** Product Configurator works on the basis of a generic bill of materials and associated routings.

These are configured into a specific bill of materials and routings at the point of quotation or order. Controlling the validity of these configurations is important.

**EFACS E/8 provides** a sophisticated configuration process whereby predefined logic may validate a bill of materials and routings, in addition to leading the user through the configuration process. By predefining the generic bills of materials and routings, including associated material and production costs and combining this with the Product Configurator logic, a sales person with limited detailed knowledge of the product may accurately quote valid configurations and pricing to customers.

**The quotation process**, including cost roll-ups, may take place even whilst in discussion with the customer. Coupled with the EFACS E/8 Estimate Due Date functionality, the sales person can also quote an accurate due date that fully considers capacity and material constraints.

## Assemble/Finish-to-Order

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Powerful Master Production Scheduling, Material Requirements Planning and advanced stocking policy functionality provide an ideal environment for assembling products or creating kits. The assemble-to-order capabilities within EFACS E/8 may also utilise the EFACS E/8 Product Configurator.

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**The assemble-to-order** environment is ideal for grouping common sub-assemblies, creating production savings through economies of scale.

**Generic**, partially assembled goods may be planned, assembled and booked into stock awaiting final completion, and may be managed according to customer specific requirements.

**The manufacturer** has the ability to rapidly deliver custom assemblies to specific customers.

**Comprehensive cost roll-up** facilities mean companies keep a tight control of 'planned', 'actual', 'standard' and 'going-to' costs.



## Make-to-Stock

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Inventory management is a key business function for companies making to stock.

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**The EFACS E/8** Master Production Scheduling (MPS) and Material Requirements Planning (MRP) modules work in tandem to provide accurate planning and control of materials and products.

**Alternative plans** may be generated to help decide which products and assemblies to buy or manufacture, and when to order or to create demand in production.

**The MPS module** looks at current demand, including planned orders, actual orders, forecasts and schedules, using rough cut capacity planning to group families of products and ensure your company has production capacity to achieve the long term plan.

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## Make-to-Contract/Project

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The Contract Control module is designed for companies who typically offer a design-to-order service.

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**Work is tendered for**, secured, and often delivered to a fixed price and agreed time scales. Raw materials and purchased components may be unique to each contract. A new contract may vary greatly from previous contracts, resulting in a wide variety of finished products.

**The Contract Control** module provides a powerful system for defining a contract structure. A complete contract may consist of an unlimited number of contract components with an unlimited number of levels.

**Details such as estimated costs** by cost head, together with expenses, action lists and documents, may be defined for each contract component. A payment stream for staged payments may also be defined for the contract.

**Cost heads allow** costs to be analysed in a flexible fashion. A cost ledger is automatically maintained detailing estimated, planned, actual and forecast costs, broken down by cost head.

**EFACS E/8** is suitable for all of these methodologies and in any combination.

## PRODUCT DEFINITION

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### Parts Master

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The Parts Master module provides a common, centralised source for vital sales, manufacturing and purchasing information.

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**A part may be** a purchased item, raw material, component, sub-assembly, assembly, finished part or a phantom part.

The powerful EFACS E/8 query system offers great flexibility when searching for like parts, or parts with certain similar specifications.

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### Engineering Change Control

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Engineering Change Control is a fundamental requirement within many manufacturing organisations. The need for computerised control in this area has been more clearly focused by the introduction of Total Quality regimes.

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**The Engineering Change Control** facilities provide an Engineering Change Note (ECN) system and full 'part revision' control. A single Change Note may affect any number of parts. A flexible status system controls the state of the ECN.

Parts may be managed at multiple revisions, each revision demanding a potentially different Bill of Materials and Routing definition.

### Bill of Materials

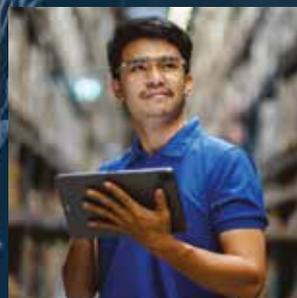
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The Bill of Materials module is designed to handle parts and assemblies composed of sub-assemblies, components, purchased items and raw materials.

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**These items** are linked together with a structure showing the quantity of each item required at each level. The Bill of Materials module takes advantage of the comprehensive Engineering Change Control facilities within EFACS E/8.

The BOM application allows efficient construction and maintenance of the BOM structure, which is clearly displayed in tree form, with a quick edit form alongside.



## Routing

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The Routing module handles detailed information about the series of operations required to make a manufactured item.

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**When combined** with the Parts Master module and the Bill of Materials module, the Routing module provides a central source of engineering data.

**The Engineering Change Control** facilities provide control over routing definition.

**Once an agreed** routing has been developed it may be frozen or locked, modifications only being permitted under the control of an Engineering Change Note.

**The Routing module** assembles detailed information on work centres, skills, planned 'set' and planned 'run' times. Detailed manufacturing instructions and tooling requirements for each operation are available.

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## Resources

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Before routing details are entered, a list of available resources is defined.

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**The Capacity Planning**, Scheduling and MRP modules of EFACS E/8 all require knowledge of factory capacity.

**The Resources module** enables detailed information to be retained about the factors that affect capacity.

**Database tables** hold details of shift & holiday patterns, sections, work centres, teams and operators. One of the many distinguishing characteristics of EFACS E/8

is the level of detail in which it considers items relating to factory capacity.

**For example**, complex shift and holiday patterns may be specified, with additional facilities for recording short-term work centre and operator unavailability (blocking).

**The user** also has the ability to specify which work centres an operator group may be assigned to, with preference and skill levels against each.

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## Hazardous Goods

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The EFACS Hazardous Goods module will assist in all aspects of the transportation or processing of hazardous or dangerous goods.

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**The Hazardous Goods functionality** allows all UN, EU and COSHH standard hazardous information to be stored and maintained.

**Carrier selection logic** can be based on a carrier's capabilities, and stock locations can be restricted according to the properties of the part in question.

**A Phrases database** can be created to hold standard hazardous phrases, which can be used to build statutory documents and labels in multiple languages.

# MATERIAL MANAGEMENT

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## ITTs, Tenders & Requisitions

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Designed for organisations where complex orders are involved, and perhaps a tendering exercise is required prior to placing firm purchase orders.

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**A full-featured** purchase requisition system is provided as part of this module. Requisitions may be converted into invitations to tender (ITT), and these tenders may be progressed directly onto the purchase order system.

**The Tendering Module** allows an unlimited number of ITT documents to be raised for potential suppliers.

**The responses** may be logged as tenders. The chosen supplier is selected, in turn automatically raising purchase orders.



## Purchase Order Processing

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The Purchase Order Processing module provides control over the important task of procuring component parts and materials required to meet the main manufacturing programme.

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**Automatic procedures** exist for placement, despatch and receipt of purchase orders, making the system simple to use and efficient in operation. Multiple units of measurement are supported, allowing goods to be stocked in a different unit to that of the supplier's unit. The following purchase order types are supported: standard orders, scheduled orders, contract orders and subcontract orders.

**The MRP system** integrates closely with the purchasing system, providing automatic placement of both standard orders and multivendor schedules. The Vendor Rating module also draws extensive analysis from within the Purchase Order Processing module, such as delivery performance, price variances and shipment quantity variance.

**The Goods Receipt function** links directly with the Stock Control module. Goods Received Note (GRN) details are automatically created and a two stage quarantine facility is supported.

Tolerance banding may be defined to check quantity, unit of measurement conversion and due date conformance. Subcontract orders update work in progress information as opposed to adjusting stock levels.

**A Contract Reservation system** allows contract orders to reserve stocked items against the defined contract.

**Full integration** is provided to the EFACS

E/8 Ledger systems. A stock accrual may be automatically posted within the ledgers upon goods receipt, and seamlessly reversed when the invoice details are entered. A purchase invoice registration and matching sub-system is provided, which allows checking against the original purchase order item and the Goods Received Note details.

**A formal Return-to-Supplier system** is also provided, where faulty or non-conformant goods may be sent back to the supplier. The choice to reopen the original purchase order is offered during the return procedure.



## Vendor Rating

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The Vendor Rating module integrates closely with the EFACS E/8 Purchase Order Processing and Quality systems.

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**A full Demerit system** is provided to score supplier performance in 3 key areas: delivery performance, price and quality. Delivery performance is monitored automatically by the goods receiving system within Purchase Order Processing.

**Price variance** is captured automatically by the Purchase Invoice procedure within the Purchase Order Processing system.

**Quality details** are entered within a special quality logging and action sub-system. The quality logs may be automatically circulated to appropriate staff using the integrated EFACS E/8 Workflow system.

**Quality problems** may also reclassify stock as reject and automatically generate a return to supplier. Action text may be entered against each log to cover investigation, correction and approval.

**The Demerit system** allows the user to define the thresholds where a certain demerit value is incurred. For example, if the goods are 2 days late, 5 points may be deducted. If, however, the goods are more than 5 days late, 10 points may be deducted, etc.

**The 'auto-place purchase orders'** and 'auto-reschedule purchase schedules' procedures within the MRP module may take account of supplier ratings when recommending suppliers.



## Stock Management

The Stock Control module holds accurate up-to-date stock information, such as physical, quarantine and reject stock, at warehouse and location level.

**The stock levels** are online and automatically adjusted by a host of other integrated procedures, such as receiving purchased goods, works order kitting and sales order despatch.

**Warehouse control** is provided by user role, allowing specific warehouses to be controlled by specified members of staff. This facility offers improved managerial control over stock movements.

**Multiple warehousing** may be deselected to retain simplicity if required. Locations within a warehouse are user-defined and may be flagged as a physical, quarantine or reject stock location, or any combination.

**This feature allows** for dedicated locations for quarantine (non-quality approved stock), and for reject stock. Each location may allow or disallow mixing of different parts and/or mixing of different traceable batches. A powerful volume and weight monitoring system may be applied to each location, whereby the system will monitor and update the volume and weight used in each location and warn against exceeding specified limits.

**A mixture** of single and multi-location parts, together with traceable and serialised parts may be managed.

This feature allows the user to control critical items using traceable and serial control, while retaining simpler control over non-critical items.

**The traceable and serial features** provide the framework and controls required by international quality regulations.

For traceable or serialised parts, a unique traceable batch is created for every receipt into stores. Every issue must also explicitly refer to a batch number, thereby providing complete forward and backward traceability.



**Issue of parts** from multiple batches may be fully managed by the user or left to the system to choose, according to the following options:

- Oldest item, FIFO (First In, First Out).
- Newest item, LIFO (Last In, First Out).
- Minimum wastage (selecting the batches whose quantities best match the requirement, thus minimising the number of batches to issue).
- Single (selecting a single batch whose quantity best matches the requirement, ideal for continuous length items).
- Default location (always selecting stock from a single default location).
- Nearest to expiry date (for stock having finite shelf life).

## Stock Taking

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Stock checks may be performed using Perpetual Inventory (PI) and/or full stock takes.

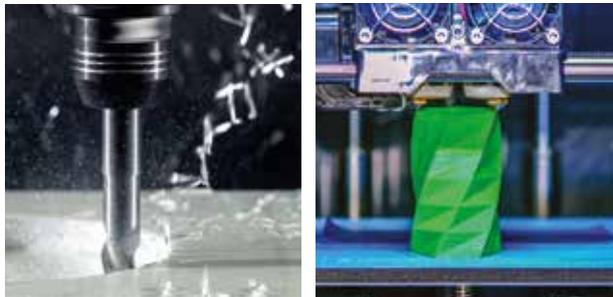
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**Stock records** that are to be counted are locked during the physical count.

**Once the count is complete**, but before the data has been entered, the locked stock records may be released, thereby minimising the time that stock is frozen.

**The PI system** provides stock selection automatically based on a cycle count field and a limit set for each of the ABC classifications.

**Up to 26 classifications** may be defined as part of the enhanced ABC analysis system.



**A full stock transaction** log is recorded, detailing the date, time, source, type and quantity of each transaction, together with additional relevant information, including the User ID.

**All stock movements** may have a direct real-time financial impact within the Nominal Ledger.

**Nominal code resolution** may be a function of part code, product group and warehouse, affording great flexibility in mapping stock types to nominal classifications.

To avoid processing large volumes of nominal transactions, per-period movements are maintained in the Nominal Ledger.

The following additional functionality areas are also available:

- **CONSIGNMENT STOCK**
- **CUSTOMER OWNED STOCK**
- **PERISHABLE STOCK**
- **STOCK PALLETS**

## Work In Progress

The Work in Progress module keeps track of work on the shop floor as it passes through its various manufacturing stages.

**Two levels of detail** are provided: works orders and work in progress details. The Works Orders table contains details of each works order, when it is due, the order quantity, customer, etc.

**The Work in Progress** table has records for each job operation, and enables detailed planning and monitoring of the progress of each job.

**Users can optionally** be prompted to select the serial numbers of the parts being allocated to the works order at the point of booking works order quantities either in the back-office or via mobile shop floor devices.

**Actual times and costs** may be accrued for later processing, and the exact status of any job may be ascertained at any time.

**For companies** operating Kanban and JIT (Just In Time) working practices, facilities are provided to fast-track orders through the system. The quantity in a Kanban may be defined for each part. Shop orders may be progressed in terms of the number of Kanbans completed.

**The Work in Progress module** may be linked with the Shop Floor Data Collection module providing real-time, accurate shop

floor data and monitoring using dedicated barcode data capture terminals.

**Where operations** are subcontracted, such as heat treatment, plating, etc. a powerful subcontract management tool is provided within this module.

**An open purchase order** may be raised with a subcontract supplier, using the Purchase Order Processing module. Multiple batches of material may be sent from the work in progress system out to the subcontractor against the open purchase order.

**Full tracking** of material is provided. The Shop Documentation modules provide detailed reports suitable for shop floor use, such as route cards, job tickets, material picking lists, etc. Barcodes are optional depending upon whether the Shop Floor Data Collection module is in operation.

**EFACS has full** features for stage kitting, the process whereby part of the materials for a job are not fully required at the initial stage, but may become required at later stages during manufacture. MRP and Capacity Planning allow for the timing element of material requirements.



## Data Management

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Mobile and barcode scanning functionality provide the ability to collect accurate, timely information with increased efficiency. Data is collected in real-time, negating the need for batch processing.

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**The EFACS E/8** Mobile Shop Floor & Warehouse Data Management module can be utilised via Android touchscreen devices and barcode data capture terminals.

**These mobile devices** can be utilised across the shop floor to manage Works Order Receipt, Work in Progress (WIP), Time and Attendance as well as throughout the Warehouse to cover all elements of warehouse and stock management, such as Delivery Picking, Stock Receipt and Stock Movement.

**Real-time data** from the shop floor and warehouse data collection fulfils many functions within EFACS E/8 and is available immediately for accurate forecasting, scheduling and reporting.

**Interactive Power BI** reports are available to view, enabling instant access to up-to-date graphical information.

**The range of EFACS mobile** applications includes:

- Delivery Picking
- Stock Taking
- WIP Booking
- Time & Attendance
- Stock Movements
- Stock Receipt/Issue
- Stock QA
- Works Order Receipt
- Receive Purchase Orders
- Advice Notes



**The Introduction** of Mobile Shop Floor & Warehouse Data Management functionality increases efficiency and reduces overheads, errors and the levels of stock and WIP.

## Time and Attendance

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The Time and Attendance module monitors attendance with the use of finger print scanners or barcodes read through collection terminals.

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**Each operator** can be issued with a barcoded clock card, which he/she uses for clocking on and off.

**Alternatively,** finger print scanners can be placed on workstations, which work in much the same manner as the barcode system.

**The date and time** of each clocking is automatically fed back to EFACS E/8, which checks to ensure that the clocking is valid and the operator and booking are consistent.

**Online error messages** may be sent back to the clocking terminal or may be logged in an error log for manual correction.

**An In/Out monitor** is provided, which gives an immediate view of who is on-site and who is not.

**Full integration** with the Mobile Shop Floor & Warehouse Data Management system is provided, whereby exception reports may be produced, which compare and contrast actual attendance with planned attendance and booked productive time.

**Hours attended** at standard, and several overtime bands are calculated.

**This information** may be used for posting into a suitable payroll system.

## Quality Conformance

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The Quality module allows users to record and progress incidents and quality concerns within the organisation.

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**Use of management stages** allows recording and tracking of actions and communications throughout the life cycle concerned.

**Providing close integration** with the rest of the system, the Quality module links directly with the Supplier, Works Orders, Stock, Customers and Workflow functionality. This integration provides a defined set of quality processes to ensure control is maintained within the business, and that the entire life cycle of a quality concern is managed correctly.

**A quality concern** can be raised from a purchase order receipt, customer return, works order or a miscellaneous action generated from your internal business processes.

Where the data links to supplier or customer records, relevant fields will be looked-up and prepopulated with essential information, saving input time and ensuring accuracy. Recording and logging fields are available for completing key quality concern details, such as the source of the problem, where the problem occurred, fault categorisation, level of severity (for vendor performance) and the disposition/outcome.

**Each stage** of a quality concern can be associated to an 'owner' and a set of recipients defined for each stage. When a stage is processed the Communications tab will allow access to the quality concern/corrective actions history.

**Workflow** is central to the entire quality process and can be used to insert process checks and approval stages into all activities and corrective actions. Workflow is also used to automate emails, sent either internally or externally to suppliers or customers for information and tasking purposes.



# PLANNING

## Material Requirements Planning

Material Requirements Planning (MRP) is a production planning and scheduling system that supports manufacturing companies with these three key objectives:

- **Ensure materials are available for production, and end products are available for customers.**
- **Maintain the lowest achievable material and product levels in stock.**
- **Plan your manufacturing activities, purchasing and delivery schedules.**

**MRP is classically used** where the company handles many sub-assemblies and raw materials, and finished products are predominantly manufactured for stock, or to well-defined sales forecasts and/or customer schedules.

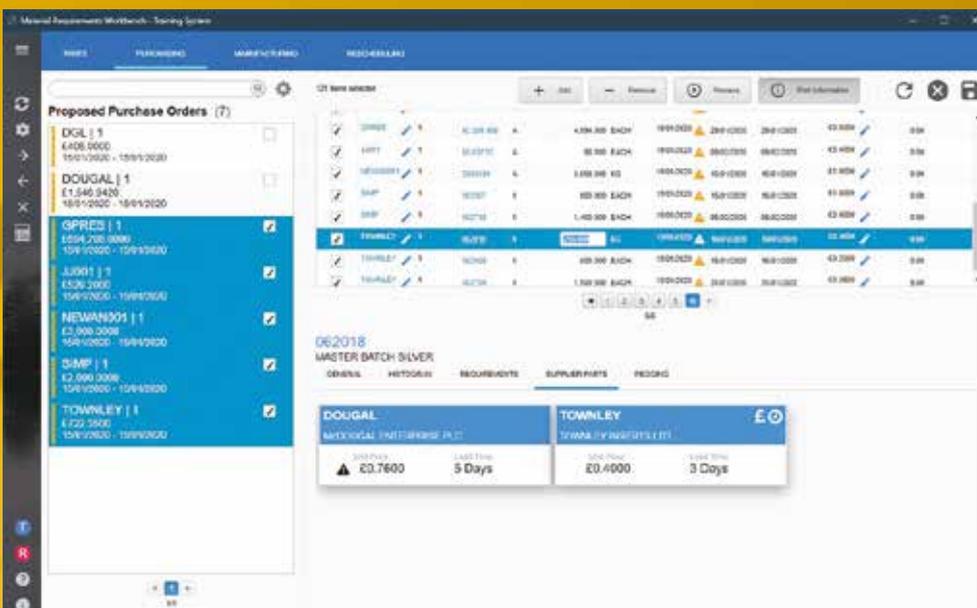
**It is often used** in conjunction with MPS (Master Production Schedule) to provide close control on the production plan.

Powerful automatic placement routines are provided, where manufactured parts may be placed as works orders, and purchased parts may be raised as either discrete purchase orders or handled by the purchase schedule system.

### MRP Workbench

**Exel's extensive history in MRP** development and implementation led to the development of the MRP Workbench, an application that provides a single, central area to manage the entire MRP process, including all functional areas, reports and graphical representations of stock profiles.

**MRP Workbench** can be run in three distinct modes - purchased parts, manufactured parts and as a single 'holistic' application to provide the functional areas required for both manufactured and purchased parts.



## Master Production Schedule

The Master Production Schedule (MPS) Workbench provides a company-wide manufacturing plan for products, building-block components, and families of products.



**This is achieved** by grouping demand from various sources, such as sales, customer schedules and sales forecasts, and comparing it with existing production purchases and stock levels. A manufacturing plan is thus developed, which provides a common view of the planned build programme. The schedule highlights areas where it may become out of synchronisation with current demand or supply, and provides recommendations to the planner in charge of the MPS as to what actions are required.

**The Available-To-Promise (ATP)** 'position by date' is calculated, as well as projected stock levels, by user-defined period. Unique to EFACS E/8 is the option to switch the ATP calculation so that it is based on finite capacity rather than manufacturing order due dates, offering a real-world view of the schedule.

**The MPS Workbench** may then be manually tuned before launching within a full MRP run. By combining the EFACS E/8 MPS, MRP and Finite Capacity Planning modules, full closed loop planning is achieved. The MPS module typically addresses the needs of manufacturing companies who make-to-stock, customer schedule or sales forecast. The finished product range tends to be small, but often includes many sub-assemblies and purchased components.

**The ability to run MPS** at a building block level also makes this planning tool ideal for organisations that assemble-to-order from a smaller standard set of building block sub-assemblies.

# Capacity Planning Workbench

One of the fundamental problems facing manufacturers, is that of, how to plan and control the complexities of manufacturing many jobs, each composed of a series of operations using limited resources.

## The Capacity Planning Workbench

streamlines manufacturing scheduling by consolidating the essential tools and data into a single user-friendly workbench application.

**Perform what-if** scenario-based scheduling by leveraging multiple optional scheduling data sources, allowing easy assessment of the impact of various factors on production plans.

Explore different scheduling scenarios and make informed decisions based on real-time data.

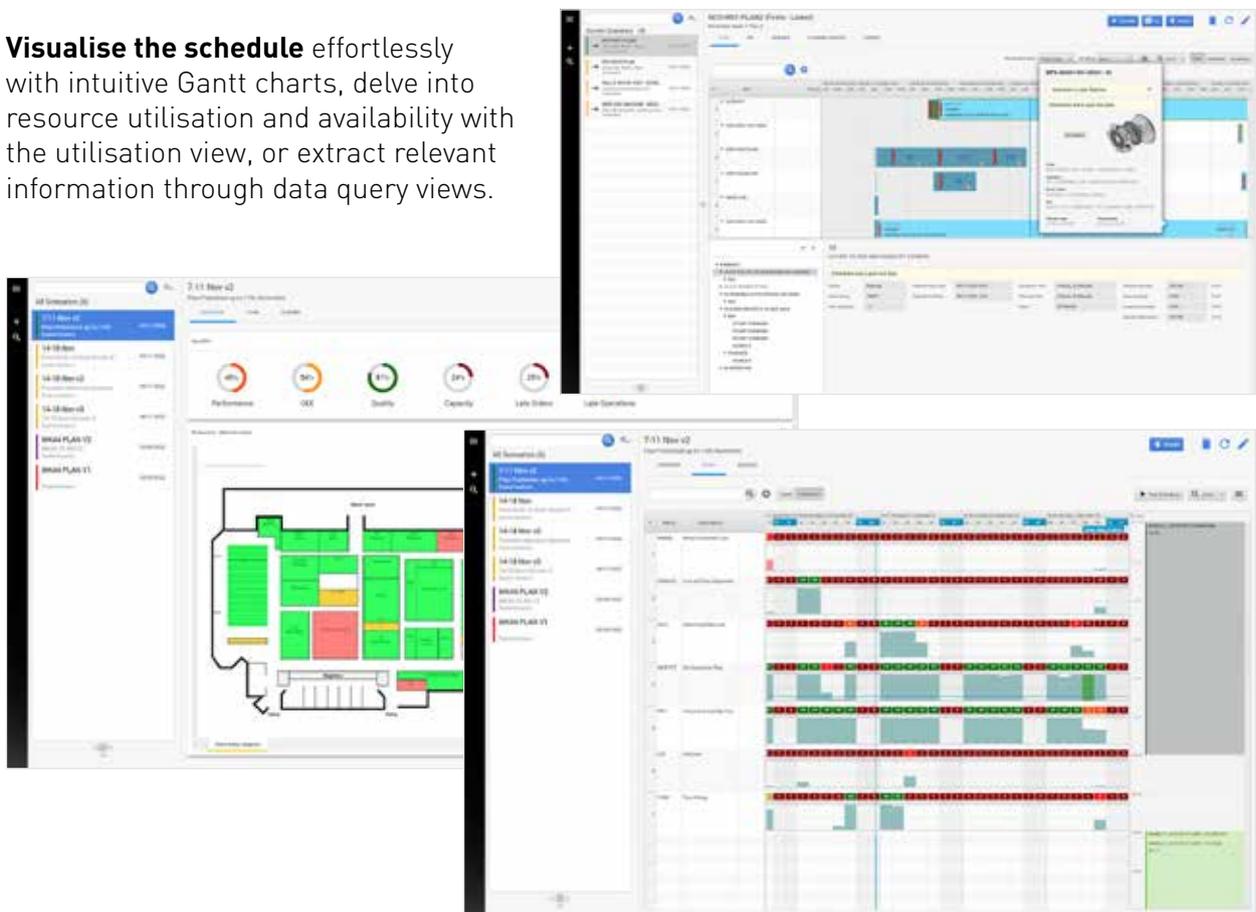
**Visualise the schedule** effortlessly with intuitive Gantt charts, delve into resource utilisation and availability with the utilisation view, or extract relevant information through data query views.

These versatile views enable analysis and interpretation of scheduling data from multiple angles.

**Fine-tune** scheduling by adjusting resource allocations, manipulating overtime and downtime, and managing manual operation overrides independently within each scenario.

**The scheduling process** is organised into distinct planning windows. These windows include history, published, planning, and draft. When satisfied with the plan in the planning window, publish it to commit to the schedule, and the planning window automatically advances according to the specified time frame.

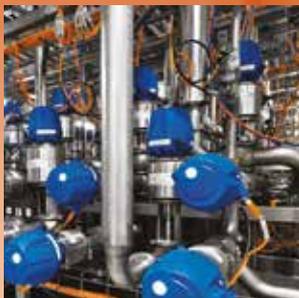
**Evaluate scenarios** effectively with customisable Key Performance Indicators (KPIs). Assign unique scores to each scenario based on specific metrics, enabling quick and accurate comparisons to identify the best scheduling solution for the organisation's needs.



## CRM

### Customer Relationship Management

Once little more than a contact management system, Customer Relationship Management (CRM) for many businesses is now an essential powerhouse of the Sales and Customer Service departments.



**EFACS CRM** is about interactions and collaboration between distributors, agents, suppliers, customers, prospective customers and end users. It is more than a technology, it is a business concept with the clear objective of finding new customers and increasing sales to your existing customer base.

**The main goal** of EFACS CRM is to facilitate and track all communications that members of your company have with external companies.

**EFACS will help** the company to automate the handling of inbound/outbound email and paper-based correspondence. For example, incoming correspondence is electronically filed against the account, through look-up of the sender's email address. Unrecognised incoming transactions are routed to a queue pending classification and association with the relevant account.

**EFACS users** will have ready access to this information, and may use it proactively to increase sales and improve relationships.

**Information is key** – knowing which are the most profitable and effective marketing campaigns, which is the most effective communication method for each customer, who are the most profitable customers, which customers are most content, which customers are least content and which customers you can cross-sell to and with which products. These are just some of the questions that are vital to the continued success of your business. EFACS CRM addresses these issues with a solution that is fully and seamlessly integrated within the EFACS ERP system, bringing convenience and efficiency to the process.

## CRM Console

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Comprehensive contact management is a key element of any effective CRM solution.

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**Efficient company-wide** contact management allows for the monitoring and recording of interactions and communications with customers and prospects.

**One central,** integrated contact management database prevents duplication, eliminates inconsistencies and means that everyone is working from the same information.



**The EFACS CRM Console** is one central place for accessing customer and prospect information. Information is displayed in tabs for ease-of-access.

**Contacts,** Addresses, Supported Parts, Service Contracts, Call Centre Cases, Marketing Activity and Sales Opportunities are all visible. In addition, tabs exist for accessing Quotations, Sales Orders, Deliveries and Financial Reports for the specific customer or prospect that is being viewed.

All notes, communications and documents related to the record can also be accessed, viewed and updated.

**Activities with customers** and prospects often lead to follow-up actions or tasks that need to be subsequently completed. The EFACS CRM system allows for tasks to be assigned and for responsibilities to be updated.

The Tasks panel on the main EFACS menu screen shows each user a list of open activities and tasks that have been assigned to them.

**The EFACS CRM Console** puts customer relationships at the centre of the business, improves responsiveness and ultimately drives the business forward.

## Mobile CRM/Field Sales

CRM functionality has been extended to handheld devices, with vital sales and customer information now available as and when the mobile user needs it.

**EFACS Mobile CRM** allows off-site users, such as sales, management or support to transact and report on sales orders, quotations and customer details.

**Real-time access** to information improves customer service, retention, and ultimately increases sales and customer loyalty.

### Near Me

**Utilising the mapping** functionality, 'Near Me' will show the location of customers and prospects relevant to you and your role.

**Yellow markers** represent prospects and green markers represent customers, tapping on a marker will show the name of the customer, or prospect and the address. An option is provided to utilise Google directions.

### Related Information

**This functionality provides** a display of related content for the selected customer, or prospect. If your customer has a number of open cases, outstanding quotations or tasks, etc. these will be highlighted in the 'Related' tab, providing easily accessible visibility of your company's interactions with your customer, or prospect.

**Enterprise Mobility Management (EMM)** provides application management, content management, location services and remote help.

**This allows your company** to maintain full control over its mobile devices, ensuring all data remains private and secure.

**Due to the potential risk** of theft or loss of a mobile device, and the resultant security risk in regard to access to company data, it is recommended that EMM is deployed in order to defend against that risk.

## Estimating and Quotations

The Estimating and Quotations module is designed to enable efficient sales enquiry logging and quotation generation.

**Full monitoring facilities** are available for outstanding quotations, together with automatic quotation transfer, creating firm sales orders upon quotation acceptance.

**The Estimating and Quotations module** is typically used where the company predominantly manufactures to order. Many, and various finished saleable items may be produced.

**Work centre capacity** and work centre utilisation, coupled with actual costing, are usually key business measures within such an organisation.

**The ability to generate** accurate estimated completion dates at the enquiry stage, based on finite capacity constraints, is a major benefit offered.

This module also allows quotations to be simply produced for standard products against established price lists.



## Sales Order Processing

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The Sales Order Processing module generates and maintains sales orders through to despatch and invoice.

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**Sales Order Processing** interfaces with Estimating and Quotations, Product Configurator, Work in Progress, Stock Control, Purchase Order Processing, Master Production Scheduling, Material Requirements Planning, Finite Capacity Planning, Sales Analysis and Sales Ledger.

**The system** gives the user the option to satisfy an order from existing stock, to create a new works order or to create a purchase order. A full sales forecast system is available, which may be automatically consumed by firm sales orders. The ordered part may reference a generic forecast part for consumption.

**Customer schedules** may be defined, which may also consume sales forecasts. Customer schedules are automatically reduced when goods are despatched against the schedule. Sales orders may be despatched either as a complete order, or as individual items.

**EFACS E/8** has comprehensive features for dealing with packages for outgoing goods. A package may be assigned to one or more delivery items, and the package given a unique reference.

**If required**, packaging items themselves may be under inventory control.

**Despatches can be** assembled into 'Loads'. These may have constraints defined against them. For instance, loads to fit a vehicle may have certain criteria taken into account, such as maximum weight and volume. A series of packages may be assembled to create a load for delivery.

**Order acknowledgements**, despatch notes and invoices may be produced automatically or manually, and may be tailored to individual requirements. Full returns-from-customer, debit and credit note sub-systems are provided, which link directly to the EFACS E/8 Sales Ledger, Purchase Ledger and Nominal Ledger systems.



## Advanced Product Configurator

Manufacturing and selling configurable products can be a challenge - specifying the options, managing any conflicts, managing the costs, creating the BoMs and Routing - EFACS' Advanced Product Configurator helps to remedy this.

**Users, either your** salesperson or your client, are guided through the product selection options via 'Wizard' style steps, providing an intuitive and simple user experience.

**As the product** is configured the price is maintained on screen, sub-totals are provided for itemised options and accessories where appropriate. Following the selection of available options an image of the final configured product is presented.

**The final configured** product, once ordered, will define and generate the Bill of Materials, Routing and Technical Specification required to manufacture and fulfil that order.

### Business Benefits

- Significantly reduced product knowledge required from the customer or salesperson
- Improved customer satisfaction
- Reduces multiple quote variations/options
- Selected options are automatically added to the quotation
- Guided selling ensures all relevant options are presented
- Automatic creation of BoMs, Routings and Specification



## Return Material Authorisation

The Return Material Authorisation (RMA) module allows companies to offer a complete and professional approach in this key area of customer service. Efficiently managing the returns of products from customers is a key requirement in maintaining strong relationships with those customers.

**The RMA module** allows for the recording of authorised returns in advance of creating the Customer Return.

**The Manage Returns** from Customer application includes the ability to create a return from an existing RMA.

**Alternatively, a Customer** Return can be generated directly from a Sales Order or a delivery.

**The entire process**, from initial communication, goods receipt, inspection and authorisation, through to a repaired product being shipped or a damaged product being replaced, can be controlled and tracked, thereby maintaining customer service levels.

## Prospect Management

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Prospect Management allows information related to a prospective customer to be formally stored within the integrated EFACS system.

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**Your business** may make a concerted effort to take an order from a prospect, converting them to a customer. Equally, sales prospecting may involve targeting your customer base in a controlled manner, with a view to improving the order book. Efficient contact at the right time and with the right information is imperative.

**The aim of EFACS Sales Prospecting** is to improve sales through better planned and organised contact with prospects and customers.

**A full history** of correspondence is retained, together with copies of any exchanged documents. Details of responses to marketing initiatives are kept, and copies of mail shots and other communications are stored for information.

**Contact details** are stored for each company, as well as the industry type, group, size of company, products sold, probability of sale, etc. This enables full segmentation and targeting of the database for specific or general marketing campaigns.

**If new business is won**, the prospect is converted into a customer, retaining all information previously acquired.

**Sales pipeline reports** may be generated in real-time through user-defined criteria, enabling realistic forecasting based on size of sale, margin, timeframe, probability, etc.

**A full history** of past correspondence, enquiries, quotes and orders enables prospects to be followed up at the correct time. By combining this feature with the Workflow module, follow-up emails can be sent automatically, or tasks generated that inform the account manager when to follow-up on an enquiry, quotation, etc.

**EFACS provides** the following facilities for use with prospects:

- Marketing campaigns.
  - Ad hoc correspondence through email, letter, etc.
  - Broadcasting (targeting customers and/or prospects for email, letter, datasheet, etc. based on your selection criteria).
  - Storage of inbound/outbound documents, specifications, drawings.
  - Logging and responding to enquiries.
  - Creation of quotations, optionally based on an enquiry.
  - Current & past activities, such as, meetings or attendance at events.
  - Follow-up activities and proactive messaging (see Workflow module).
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## Opportunity Management

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Opportunity Management enables sales and marketing departments to track sales opportunities through their entire life cycle. By providing access to the tools and information required, users are able to efficiently manage the process, provide accurate forecasts to the management team and ultimately increase sales.

**Sales pipelines** can be managed by sales staff and monitored by senior management. Stages can be defined in order to accurately record the position in the sales process of each prospective opportunity.

**Probabilities**, forecast values, targeted close dates and expected close dates can be assigned to each opportunity in order to track and forecast all activity in the sales department.

**Activities** can be recorded against each opportunity to provide a full history and audit trail of actions that have been taken, calls made or meetings attended.

**Opportunities** can be converted into formal Quotations, or directly into Sales Orders. A well organised, more efficient sales and marketing team will be better placed to increase sales.

**By automating** administrative and repetitive tasks using the EFACS Workflow module, time can be more productively managed.

## Marketing Campaigns

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The Marketing Campaign module is designed to track and monitor the performance and costs of marketing initiatives, which are called Marketing Campaigns in EFACS.

**A Marketing Campaign** is assigned an individual reference, and can be linked to other campaigns enabling costs and results to be analysed if required.

**For example**, in the case of an exhibition, stand design, brochure material, attendee profiles and so on may be designated as separate marketing campaigns, but forming part of a group.

**Customers** and/or prospects may be automatically associated with a Marketing Campaign through a user-defined 'broadcast', which executes mail and email shots within a campaign.

**It is possible** to analyse response ratings, costs per contact and profitability, which together will indicate the effectiveness of a campaign, and the return on investment from individual events or marketing campaigns.



## Broadcasting

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The Broadcasting module is used to facilitate large direct marketing campaigns to the customer and prospect database. These campaigns can be via email or mailshots, either through EFACS directly or linking to a third party package.

**Within the Broadcasting module** you can segment and target through user-defined criteria, such as, industry sector, SIC code, location, previous product sales, size of company and job function.

**Once a filtered list** of recipients has been created, this may be linked to a prepared document with contact personalisation within the email message body.

**One or more** attachments may be added to the broadcast before it is sent out. The broadcast will automatically be recorded as an activity against the prospect or customer to provide a complete picture of historical communications.

**Dynamic recipient lists** can be created for regular broadcasts so that recipients that meet a specific set of criteria can be sent the broadcasts, without having to regenerate the distribution list each time.

**The Broadcasting module** fully supports database mail-merge functionality, such that emails can be personalised to include, for example, the recipient's name, company name or job title.

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## Contract/Project Control

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The Contract Control module is designed for companies who typically offer a design-to-order service, with delivery to fixed costs and agreed time scales.

**The Contract Control module** provides a powerful system for defining a contract structure and maintaining contract information across all the stages of a contract, through to completion. A full contract may consist of an unlimited number of contract components with an unlimited number of levels. The contract may be linked to any number of sales orders for the contract customer.

**Details**, such as estimated costs by cost head, together with expenses, action lists and documents may be defined for each contract component. Cost heads allow costs to be analysed in a flexible fashion.

**A cost ledger** is automatically maintained detailing estimated, planned, actual and forecast costs, broken down by cost head.

**The Project Management module** provides a 'project umbrella' for the tendering process and subsequent management of successful contracts associated with a project.

**Defining a 'Project Manager'**, as well as all project 'Stakeholders', provides visibility of all interested parties and any interaction they have with the project.

**Users are able** to generate and manage project-related quotations directly from this application, including the progression of a Quotation to a Sales Order and a Standard Contract, without the need to navigate to the specific applications.

**A Project Summary report** provides a summary of the project, and via reporting drill-downs, users can view detailed cost and revenue for the underlying contracts.

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## AFTERMARKET

### Call Centre

Call Centre is appropriate to the business that needs to supply a product support service to its customers and suppliers.

**The Call Centre module** will normally be used to monitor and control after-sales services. However, the module is not confined to customer based activities.

It may be used to record and progress communications with suppliers and miscellaneous organisations or contacts such as designers, architects, subcontractors, etc.

**Through the Call Centre**, a unique Case Number is raised and monitored through its life cycle. Cases may be categorised and assigned a priority or service level.

Escalation procedures may be applied using EFACS Workflow, to ensure a timely response and that the relevant people are kept informed of progress.

**Recipients of** these 'follow-on' activities may be users of EFACS within the organisation, a remote person or third party kept informed by SMS messaging, email or EFACS tasks.

**All correspondence** and activities related to the case may be tracked, photos and records of problems can be stored and correspondence relating to technical issues maintained.

#### The following features are included:

- Automatic assignment of a unique Case Number.
- Phone number driven look-ups for speed of entry.
- User-definable case categories and events for classification and analysis.
- User-definable priorities or service levels.
- Unlimited number of events or correspondence records.
- Multimedia support of documents and correspondence, including emails, Word or Excel documents, CAD viewers, digital photographs, video, voice, etc.
- Integration with Workflow and Business Process Automation to automatically trigger activities. These may be conditional, based on the type of call or service level, sending emails, tasks or alerts as appropriate.

**From the initial call** through to resolution and follow-up, the EFACS Call Centre module provides a focussed solution for an efficient, high quality support service.

## Contact Management

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The EFACS Contact Management functionality provides users with a complete view of a customer account, including addresses, contacts and financial history, along with all communications and activities.

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**Accurate and comprehensive** contact information is central to an effective Service/CRM system and enables efficient, proactive customer communication.

**With the EFACS** Contact Management module, users are provided with the information and the tools to improve operational efficiency and ultimately improve customer care.

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## Service Quotations

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Rapid response to enquiries and the generation of accurate quotations is essential to providing a high level of customer service and winning future contracts.

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**EFACS has** a powerful and flexible Quotations module, which enables fast quotation generation, as well as enabling the management of detailed tender documentation.

**Full progressing** and monitoring facilities for outstanding quotations are provided, along with automatic quotation transfer, creating firm sales orders upon quotation acceptance.



## Field Service Management

The Field Service Management system is a complete service and mobile management solution providing real-time information and resources to field based engineers, delivered directly to their mobile or touchscreen device.



## Customer Care

Good communication with customers is vital. Just as important is the recording, management and distribution of such communications.

**Typically, an issue** will arise that requires attention from a number of staff before it can be satisfactorily resolved.

**EFACS Customer Care** allows activities and correspondence to be held against a unique reference, keeping both colleagues and associated parties, including those at the customer, informed as appropriate.

**EFACS Workflow** automates this communication with colleagues and external parties through text message, email or EFACS tasks; based, for example, on the assigned priority level.

The following features summarise Customer Care in EFACS:

- All details are held against a unique Care Number.
- Unlimited communication records can be held against each Care Number, categorised as inbound/outbound, whether email/telephone/letter/mobile, together with contact details.
- An unlimited number of multimedia documents can be held using the Document Management module. Notes may be associated with each communication record or the Care Number itself.
- Documents may be held at different revision levels, facilitating a collaborative approach to solving issues or agreeing plans or designs.
- User-definable priority or service levels can be used to expedite as appropriate. Multiple user-definable 'satisfaction indices' may be assigned to assist with account management and analysis.

## Maintenance Contracts

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The EFACS Service Contract function supports any number of supported products (assets), across any number of sites.

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**The contract price** may be defined by contract period or, optionally, be derived from the charge per supported product. Individual SLAs may be defined by supported product and allow differing response levels by asset. Regular maintenance invoices are generated and posted through to the invoicing module.

**Some companies** sell goods with a period of warranty attached to them. This functionality is specifically designed to provide a means of recording and tracking all calls relating to products under warranty, as well as miscellaneous customer requests, complaints and reporting of faults.

**Supported products** may have been sold direct to the customer, or through a number of distributors, wholesalers or agents.

**In many cases** the end user of the product or equipment may not be known until a 'Warranty Card' has been returned, or the initial call received to report the fault.

**The Service module** allows this 'end user' to be recorded, together with all the equipment/products they own. Warranty expiry dates are held against all products.

**Often the warranty** requirements will be initiated through the EFACS Call Centre, where the call can be tracked through a series of status points, for example, raised, agreed, accepted and assigned, this provides an essential basis for reporting and performance monitoring.

**A site visit** may be required to repair or replace a product. This call-out or repair may be assigned a reason code and allocated to subcontract engineers or agents.

**The costs of labour** and any materials used are recorded. Collected data may be used for payment of the subcontractor and billing of the customer, if appropriate.

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## Planned Maintenance

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Planned Maintenance or Planned Preventative Maintenance allows visits to be scheduled over the length of a Service Contract, or up to a user-specified date. This allows users to publish planned visits to your customer in advance, and balance resources against available hours.

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**A Maintenance Plan** is defined for each product type, allowing any number of Planned Maintenance jobs to be specified for each product/asset, together with their service interval, number of required engineers and planned time. Each Planned Maintenance job may be subdivided into any number of tasks and then presented to the engineer on their mobile device.

**Recording of the time** that engineers spend travelling, working, waiting or on breaks is automatically collected and is available to back office users in real-time. Costs incurred by job or contract can be compared with revenue to assess profitability.

## Assisted Engineer Scheduling

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The Assisted Scheduling functionality represents the next generation of FSM scheduling, combining class leading functionality with unparalleled usability.

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**The scheduler** uniquely combines powerful scheduling management capabilities with an intuitive user experience that intelligently assists even inexperienced users to make the correct scheduling decision, first time, every time. The Assisted Scheduler has a user-friendly interface and will synchronise in real-time with individual engineers' Outlook/Lotus Notes diaries.

**This is because** the Assisted Scheduler is designed to work in real-time at every level and to provide visibility of information across the entire organisation.

**Access to real-time information** is essential, and at the heart of the Assisted Scheduler lies a user configurable decision engine, its sole purpose is to aid the operator to make the right scheduling choice first time.

**This decision engine** takes into consideration every pertinent fact including Service Level Agreements, job type, job location, engineer's skillset, engineer's location and real-time route mapping technologies.

**The system** will then make recommendations for the user based on your individual company priorities and allocation rules, maximising first fix ratios. As the system synchronises with engineers in real-time, users have immediate visibility of any potential problems or difficulties and can react accordingly.

**The scheduling screen** allows users to allocate a call against an engineer and takes into account the engineer's skillset, location of job and the type of work. It shows which engineers are going to be closest to the job. The user chooses from the selection available, picks an appointment slot and allocates the job.

**Even if somebody** in the call centre has no knowledge of who is best skilled to deal with the job, the system will recommend the correct choices based on your allocation rules, therefore improving first fix ratios.

**All users** are provided with visibility of current job allocation, workload and up-to-the-minute progress on all ongoing cases/jobs. The scheduler provides this through real-time updates, job identification, day history, jeopardy alerts and full past and present job information.

**Real-time diary updates** can be synchronised with Microsoft Outlook diaries to provide different departments with complete visibility of shared resources, avoiding costly 'diary clashing' situations. As cases are allocated/reallocated, the Outlook diaries will mirror updates within the Assisted Scheduler.

**Service Level Agreements (SLAs)** are of utmost importance when scheduling workloads. The scheduling module shows appointment/booking slots that meet customer and equipment specific SLAs, and highlights slots where operators will not meet a specific SLA.

## Remote Worker/Mobile Data

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Service engineers are provided with real-time access to cases, schedules and mobile data.

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**Case updates** are relayed real-time to the back office management system, ensuring that company-wide mobile data and office based information is unified throughout.

**The solution** works on or offline on different platforms, including mobile phones, tablets and laptops.

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## Service Invoicing

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**This is a powerful** and flexible system for managing all invoicing requirements, including a basic invoice raising routine triggered from a service call, regular automated maintenance contract invoicing and a comprehensive Nominal, Sales and Purchase Ledger system.

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## Web Self-Service

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The Web Self-Service functionality allows customers and employees access to information and the ability to perform tasks via the internet.

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**The 24 hour-a-day** availability and immediate access to information improves the customer experience, reduces manpower requirements, lowers costs and leads to a more efficient service operation.

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## ACCOUNTS

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### Making Tax Digital (MTD)

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EFACS allows electronic VAT submission using current HMRC standards and we have a programme in place to ensure our software is compatible with changes to the HMRC submission mechanism.

The MTD initiative from HMRC also concerns storing and retaining digital records, which is already inherent in EFACS.

### Nominal Ledger

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The Nominal Ledger is seamlessly integrated with the Sales and Purchase Ledgers and also the Fixed Assets module. All stock transactions may, optionally, integrate directly with the Nominal Ledger, either at Standard or Actual Batch cost.

**Designed for ease-of-use** and powerful management reporting, the Nominal Ledger module draws on the flexibility inherent within EFACS E/8.

**Automatic posting** from Sales and Purchase Ledgers is provided, as well as several types of nominal journal entry.

**Facilities exist** for real-time postings between stock movements and the Nominal Ledger, with the resolution of nominal account code achieved by look-up based on categories assigned to the part, warehouse and customer involved in the stock transaction. These real-time postings can either be calculated using Standard cost or Actual Batch cost.

**A highly flexible** chart of accounts structure is provided, which allows unlimited levels of reporting. Linking between summary accounts and detail codes is independent of the code system employed, thereby providing great flexibility.

**The combined use** of a hierarchical chart of accounts structure and analysis codes offers unparalleled flexibility when allied with the Nominal Ledger report generator.

**Shorthand and apportionment** codes may be defined. Upon entering such a code, EFACS E/8 will automatically relate the posting to one or more actual posting nominal codes.

**With the apportionment facility**, fixed percentage splits may be defined to any number of actual nominal codes, subject to the right authority. Manual alteration of the percentage split is supported.

**Ledger transactional** information is retained at Period or Year-end and not cleared, thereby providing excellent historical analysis.

**Management reporting** information is automatically created in real-time to supplement detailed transaction information.

**Powerful data-mining** and online analytical processing (OLAP) nominal ledger reporting facilities within EFACS E/8 provide users with unlimited access to their data. Detailed analysis of business trends and anomalies may be carried out with ease.

**Data may be drilled** through to see greater levels of detail. Decision makers can answer complex queries quickly, as well as carry out detailed investigation without the need for programming skills.

## Nominal Ledger Report Writer

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**The EFACS Nominal** Ledger Report writer can be used to extract period movements into spreadsheets, such as Excel.

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**Profit and Loss**, Balance Sheet and Management Accounts may be produced using the EFACS Nominal Ledger Report Writer.

**As well as using** Nominal Ledger codes and groups, separate analysis codes may be added and attached to codes and groups, to add to the flexibility in report design.

**EFACS' Nominal** Ledger Report writer allows:

- Simple selection of nominal accounts, groups and analysis codes.
- Easy definition of actual, budget and forecast values.
- Period values and year-to-date totals for current and earlier years.

... with no loss of spreadsheet functionality.

**No additional spreadsheet** or database skills are required and report templates can readily be produced and distributed.

**The module requires** Microsoft Office, and for additional security, is client specific.



## Sales Ledger

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The EFACS E/8 Sales Ledger offers unparalleled ease-of-use with high levels of functionality.

The Sales Ledger module is an integral part of the financial suite and of the entire EFACS E/8 business solution.

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**A consistent view** to all users is presented across the commercial, manufacturing and financial aspects of the system, offering seamless, integrated information.

**A modern approach** to ledger software design has been taken, providing integration with the Sales Order Processing module and the Nominal Ledger module.

**Direct sales** journal entry is provided as well as automatic posting from the sales invoice and credit note routines, including automatic cost of sales postings.

**High resolution reports** are available for printing invoices, credit notes and statements on plain, letter headed paper.

**Preprinted multi-part** stationery is also available.

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## Cash Book

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The Cash Book module reports on bank control account transactions from the sales ledger, purchase ledger and nominal ledger. There are programs within this module to post journals to bank accounts and to post transfers between bank accounts.

**Multi-currency** bank accounts can be used. These bank accounts are the one place in the nominal ledger that hold values in both foreign currency and home currency.

**Currency transactions** may be posted between bank accounts. Foreign currency bank accounts may be revalued.

**It is possible to add** details from bank statements, and from these, to reconcile bank accounts. Reconciliation is by value and cheque number, or by value and bank reference. There is a facility to maintain bank references to assist with reconciliation. There is also an unrepresented transactions report (receipts, payments, journals).

**There are reports** on bank accounts, which sort the details by EFACS internal batch number and by bank reference. Currency bank accounts show the currency values. These reports may be more useful than the nominal reports on the bank accounts, which show details in list form by tax date in home currency only.

**There is also** a cheque summary report to show details of cheques paid.

## Fixed Assets

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The Fixed Assets module has been designed to meet the needs of large to medium sized organisations. The EFACS E/8 Fixed Assets module provides a comprehensive system for the financial management of a company's fixed assets and integrates fully with the EFACS E/8 Nominal Ledger.

**Each asset** associated with the company is defined, together with the information necessary for its financial management.

**On receipt of a Fixed Asset** through the Purchase Order Processing module, the Fixed Asset Register is optionally updated.

**Depreciation** of fixed assets may be apportioned over an unlimited number of Nominal Ledger accounts.



## Product Costing

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The Product Costing module generates a rolled up standard cost, based on details held on the Routing and Bill of Materials tables.

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**For each part number**, the material, labour, subcontract and overhead costs are calculated. This information is held within the Parts Master system. Labour, subcontract and overhead figures are calculated by reference to the Routing and Resources modules.

**Three standard cost sets** may be maintained: fixed yearly standard, current standard and going-to standard, which is used for next year's standard.

**The cost roll-up procedure** may be selective or global, and may be used for 'what-if' cost analysis. Full account is taken of multi-manned or partially-manned operations when analysing labour and overhead costs.

**A sophisticated** error and warning logging system is provided to ease the task of tracking down parts that fail the cost roll-up procedure, due to, for example, a missing material cost or a manufactured part with no route.

**Cost elements** are held for 'this-level' costing and 'rolled-up' costing, thereby providing detailed information on each part produced by the company.

**EFACS E/8's** customisation system allows user-defined formulae to be entered that may control the calculation rules for each of the six cost elements.

**Company specific** empirical formulae, for example, used to analyse overhead costs, may therefore be handled without the need for bespoke modification.

**Full history** may be recorded holding the detail elements used for generating yearly standards, such as work centre hourly rates, operational set and run times and component details. A number of years' history may be retained for audit purposes.



## Job Costing

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The Job Costing system provides extensive reporting based on works order labour bookings compared with planned costs, actual material issues compared with planned material and actual subcontract costs incurred through the Purchase Order Processing module compared with planned subcontract costs. Analysis is available by works order, work centre, operator and section.

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**Analysis** within this module relies on accurate data being fed through the material issue procedures within the Stock Control module, and timely, precise labour booking made within the Work in Progress module.

**Labour bookings** may be gathered manually through keyboard input, or data may be gathered using the EFACS E/8 Shop Floor Data Collection module. Data is fed back from the shop floor through barcode data collection and provides instantaneous up-to-date costing.

**Miscellaneous expenses** may also be booked within the Job Costing module. A set of 'actual cost' fields are held on the Parts Master table and Stock Batches table, which may be updated by analysis produced by the Job Costing module.



## Multi-Company

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The multi-company features of EFACS E/8 are comprehensive, flexible and multi-level.

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**In practice**, group structures often have unique characteristics. The level of integration between companies and the degree of control exerted from the central group varies dependent on business mix, localisation requirements and strategic direction.

**EFACS E/8** multi-company facilities and toolsets have the flexibility required to tackle these varied needs. Required multi-company facilities are predominantly financial, but can extend the facility to stock, work in progress, manufacturing, sales, purchasing and other areas of EFACS.

**EFACS E/8** multi-company functionality allows each company to have its own software and reporting configurations.

A real-time routine manages the consolidation of company data to the multi-level group structure.

This method is applicable where member companies operate independently.



## Intra-Group Trading

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In many group structures, companies within the group trade with each other. EFACS E/8 promotes efficiency with a streamlined approach to intra-group trading, removing unnecessary manual steps and automatically performing group-level profit elimination of intra-group transactions, thus providing an accurate profit picture.

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## Landed Costs

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The landed cost represents the total cost of purchase, transportation, warehousing and distribution of a product, be it a raw material, a semi-finished item or a finished article. These indirect costs are captured by EFACS E/8 so they may be analysed and incorporated into the total cost of the product.

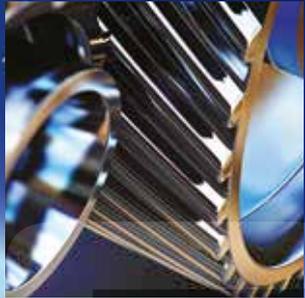
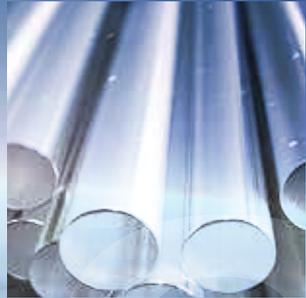
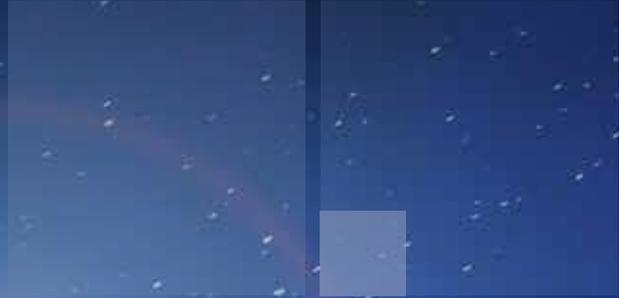
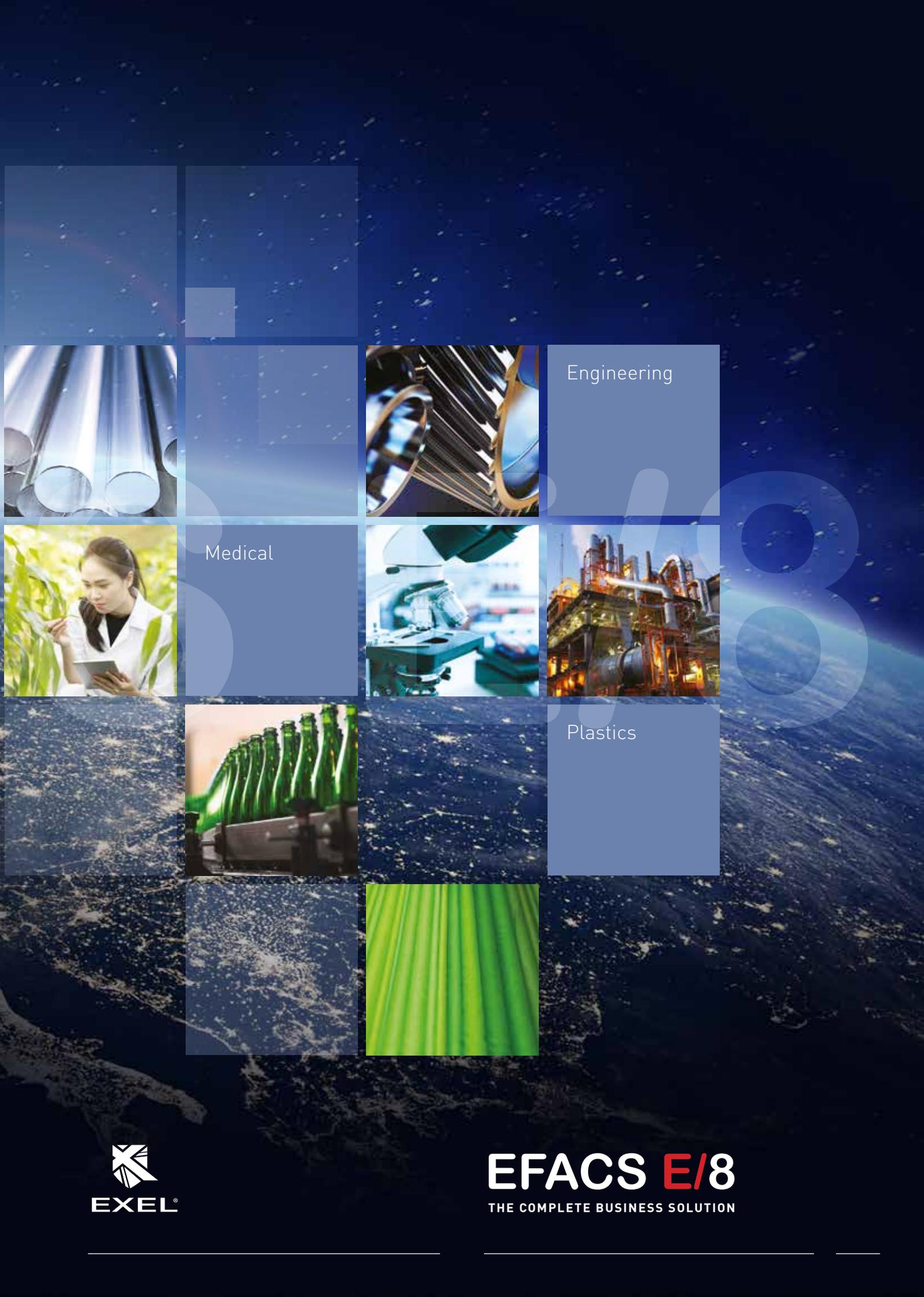
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**The Landed Costs module** seamlessly integrates with the Product Costing module and provides a comprehensive, flexible solution to the complexities of recording an unlimited number of indirect overheads for each product/shipment.

**Any number of indirect** overhead cost types may be defined, such as transportation charges, excise duty/other taxes, insurance charges, WEEE costs, etc.

**The amount of manual** work and manual reconciliation that is needed is greatly reduced. This will lead to a reduction in administration work, and a reduction in costly errors.

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**EFACS E/8**  
THE COMPLETE BUSINESS SOLUTION

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