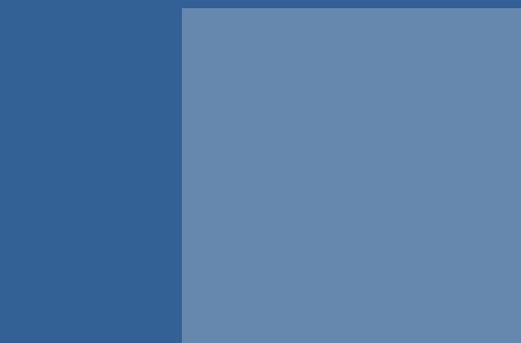




EAGLE
FIELD SERVICE

Field Service Management Software



Improving service using Field Service software

Eagle Field Service is leading the way in advanced and flexible field service management software.

Built using the latest internet technology, our **browser based** solution delivers unprecedented levels of control and visibility to field service businesses, whether deployed **on premises or in the cloud**.

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

Service engineers are able to access and relay information directly to the back office management system. This ensures that mobile data and customer information is unified throughout the company.

Exel Computer Systems plc, a UK based software author was established in 1985, and today we are a leading force in the provision of integrated business solutions for field service providers.

Our philosophy is to supply companies with state-of-the-art, flexible business solutions, and to enable our customers to achieve leading-edge business operability.

With over 30 years' of experience, Exel serves a diverse customer base, which includes small, medium and large size companies.

With hundreds of successful implementations and tens of thousands of users in the UK and around the world, Exel has a proven track record of working with some of the world's most well known companies.

The underlying architecture of the Eagle Field Service 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.

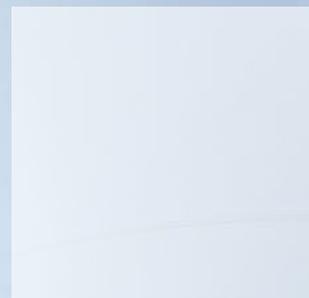
It is this ability to change and evolve, without having to go back to the software supplier, that allows Exel's customers to future-proof their investment.

In a constantly changing business environment Exel is a provider you can trust, and with continual product investment, a company which will be around in the future.



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The fully integrated, complete business solution

Eagle Field Service provides an end-to-end solution that enables companies to achieve increased efficiency and customer service, maximise profits and build competitive advantage.

Most companies nowadays are looking for more than just a service system.

Companies understand that knowing their clients and proactively engaging with them is key to customer satisfaction and long-term success.

'Service CRM' allows your engineers to truly capitalise on their close relationships with customers and see where additional value-add or sales opportunities exist.

The core elements of the Eagle Field Service system include a comprehensive Contact Management system, Quotations, Warranty Service, Assisted Engineer Scheduling, Remote Engineer applications, Workflow, Call Centre Case Management and Planned Maintenance.

Additional integrated modules include Document Management, CRM, Stock Control, Purchasing and Finance.

Eagle – Part of the EFACS E/8 ERP family of products

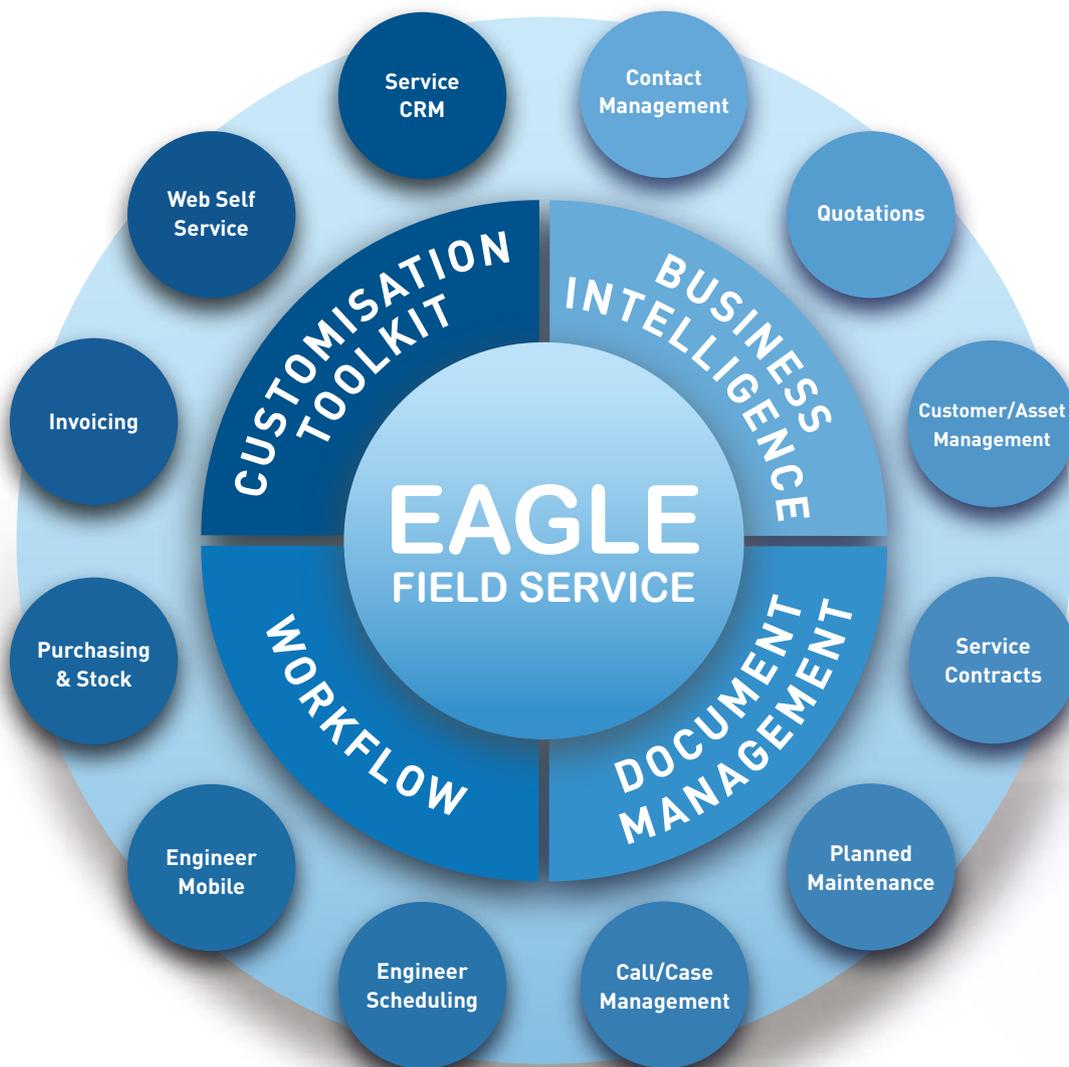
Eagle Field Service is only one part of the fully integrated suite of products authored by Exel.

If you are only looking for a Field Service Management system, Eagle includes all the relevant modules and functionality expected for use in this industry.

However, if you also manufacture your own products or have requirements for additional business software then you can access any part of the EFACS E/8 suite of products.

Eagle Functionality at a glance

- **Comprehensive Contact Management**
- **Asset/Warranty Management**
- **Planned Maintenance**
- **Call Logging & Escalation**
- **Engineer Scheduling**
- **Engineer Skills Matrix**
- **Remote Engineers**
- **Stock Management/Purchasing**
- **Job Costing**
- **Invoice Generation**
- **Document Management**
- **Task Management/Reminders**
- **Mapping Web Services**
- **Postcode Lookup Web Services**
- **Audit Trail**
- **Multi-Language**
- **Web Portal**
- **Text Messaging**
- **Integrated Workflow**
- **Integrated with Office 365 and Power BI**
- **Fully integrated to the EFACS E/8 ERP business suite**



Empowering our customers

Eagle Field Service uses the latest innovative internet technology to provide accurate, real-time information to field based engineers and sophisticated management applications for back office operators and management.

At the core of the Eagle Field Service solution are the Management Reporting, Document Management, Workflow and Customisation Toolkit modules.

This underlying technology provides the basis for increased operational efficiency and productivity, leading to improved customer service.

“As your processes develop, or your customer requirements grow, Eagle Field Service can be adapted to meet these changes by empowering you to enhance the system without needing to involve the software author.”

Business Intelligence & Reporting

The **Eagle 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, Eagle 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.

Document Management

The **retention, storage and accessibility** of documents within a business are critical to its efficiency.

The **Eagle Document Management system** provides quick, secure and auditable access to information.

By allowing documents to be centrally stored and accessed in the office or remotely, the speed at which your organisation can respond will be greatly enhanced.

Provision is available for all formats supported within a browser environment.



Workflow

The Eagle Workflow module automates business procedures and improves operational efficiency by providing a framework for integrating the flow of a company's business activities within the standard operation of the software.

By freeing up your time from repetitive administrative tasks, Workflow saves time, which ultimately increases profitability.

A graphical user interface is provided for building a Workflow model, much like drawing a flow diagram, in order to visualise the process path and the decisions required, dependent on the outcome of certain events.

The easy-to-use 'drag-and-drop' modeller allows you to easily monitor the business system, looking for events taking place. When an event occurs Workflow can initiate a series of further actions within the organisation.

Incorporated into the day-to-day business of the company, Eagle Workflow delivers substantial business benefits.



Customisation Toolkit

The Customisation Toolkit functionality enables Eagle Field Service to combine 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 your company.

The Customisation Toolkit enables specific staff to add or enhance functionality, thereby delivering additional flexibility to Eagle users.

Customisations exist on an additional layer which extends the core functionality of Eagle without the need to alter the standard software.

Customisations can range from the introduction of simple validation on fields to new panels and scrolling data sets for data entry and data display.

The Eagle Customisation Toolkit provides the ability to extend any table by adding any number of columns for storing additional information.

These are called Custom Columns and can be managed from within the software without the need to make any manual database changes.

The Customisation Toolkit and Custom Columns functionality provides further extensibility to Eagle Field Service applications, ensuring that as your business requirements change you do not outgrow your system.

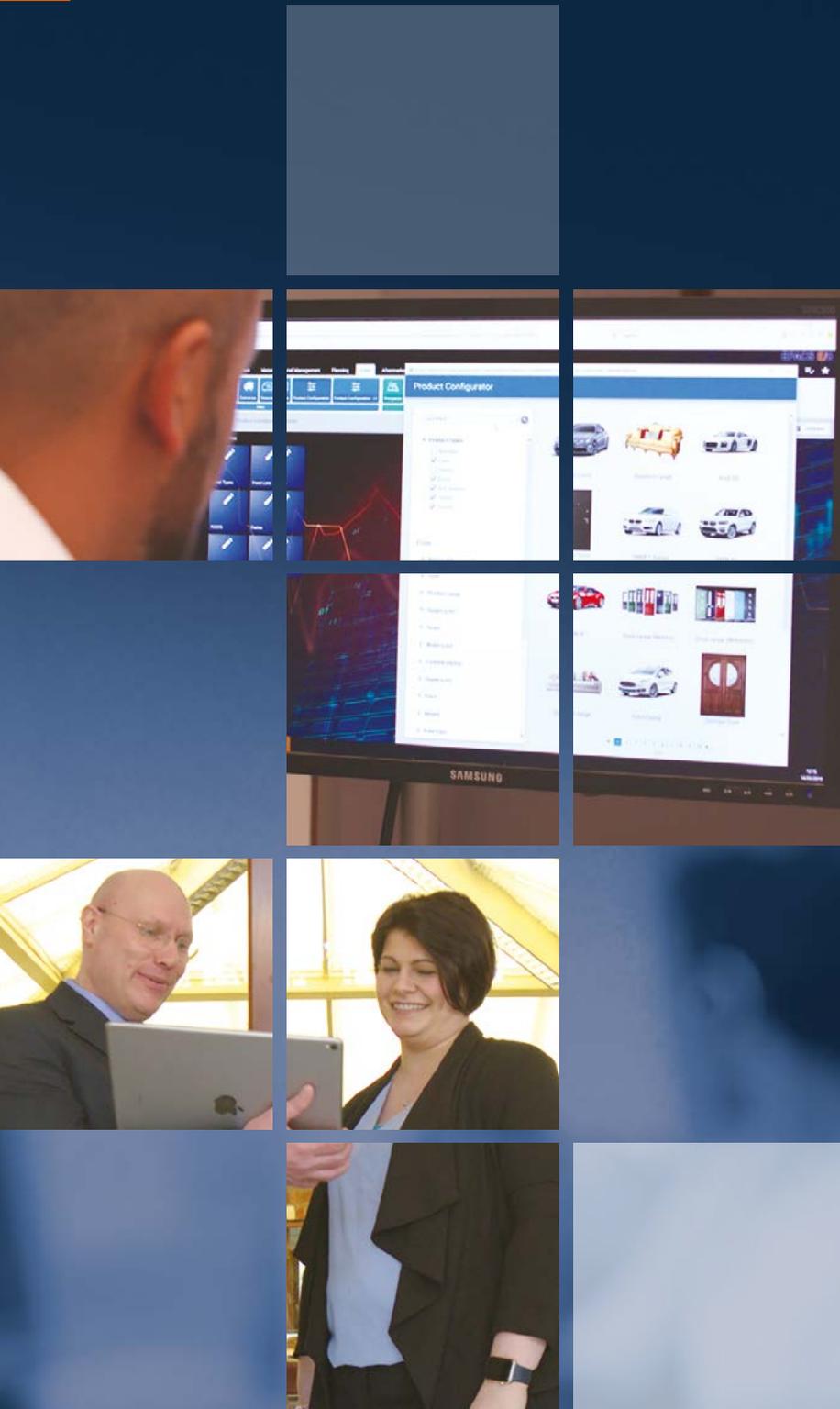
Service Oriented Architecture

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

Eagle provides a web service for use by Third Party software to interrogate and update data within the Eagle 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.



Contact Management

Manage customer and prospect contact information in one simple to use application.

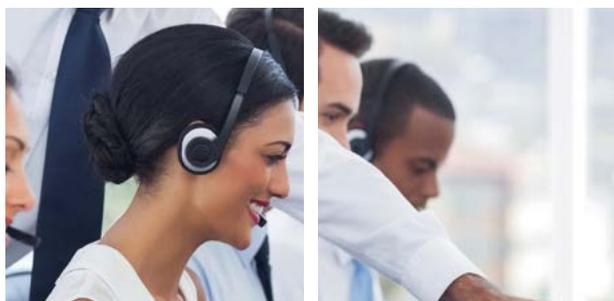
The Eagle Contact Management system provides one central place for accessing customer and prospect information which is displayed in tabs for ease of access.

Contact and Address information, Supported Products, Service Contracts, Call Centre Cases, Marketing Activity and Sales Opportunities are all visible, as well as Quotations, Sales Orders, Deliveries, Financial Reports, Notes, Communications and Documents.

Eagle 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 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.



Quotations

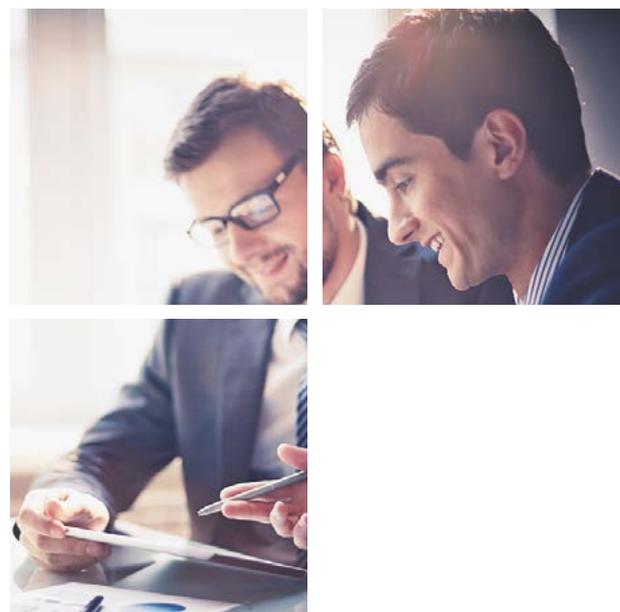
A powerful and flexible Quotations module enables rapid quotation generation as well as enabling the management of detailed tender documentation.

Configuration of quotations may be complex, especially where the servicing of technical or 'one-off' products are being requested.

However, Eagle simplifies this process by allowing quotations to be produced for standard products against established pricelists, or even copied from a template.

A full progressing and monitoring facility for outstanding quotations is provided, which includes 'probability-of-success' scores for management reporting, success evaluation and conversion rates; by customer, sales person or product.

Upon quotation acceptance the automatic quotation transfer functionality creates firm sales orders and cases on the system.



Customer / Asset Management

Accurate asset management of supported products (including 'Parent/Child' structures) will allow you to operate more pro-actively and analyse precisely your profitable and unprofitable assets/customers, which is vital for strategic planning and effective operational control of your business.

Service Contracts

Any number of supported products (assets) across any number of sites may be supported under the Service Contract function.

The contract price may be defined by contract period, or optionally derived from the charge per supported product. Individual Service Level Agreements (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.

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.

Planned Maintenance

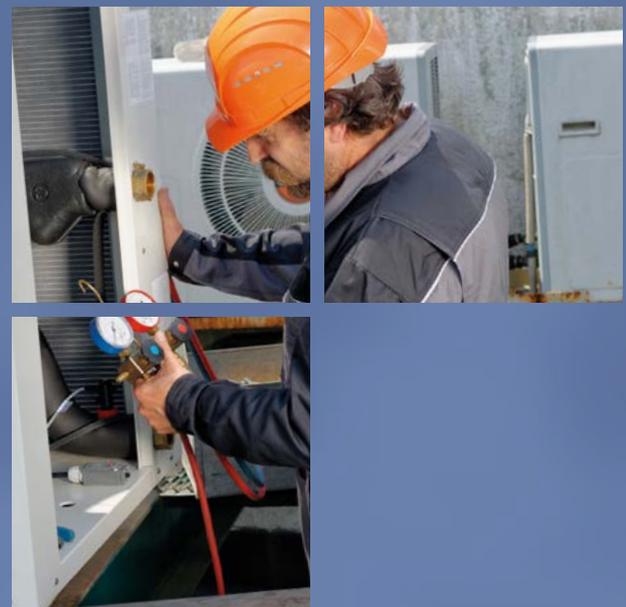
The Eagle Planned Maintenance (PM) module provides companies with the facility to plan, schedule and manage all planned maintenance requirements for the entire duration of the contract.

Users can publish planned visits to your customer in advance, and balance resources against available hours.

Invoices may be raised 'upfront' or as visits are completed, or a combination of both.

The Engineer Scheduling Board shows engineer loading for both PM and reactive visits.

The fully integrated nature of the solution ensures that companies know exactly which assets their customers have on-site, providing the ability to track changes to assets and manage maintenance contract pricing year-on-year.



Call / Case Management

The Call Centre functionality is core to a business that needs to monitor and control after-sales service to their customers.

Through the Call Centre module a unique case number is raised and monitored through its life cycle.

Cases may be categorised and assigned a priority or service level. All correspondence and activities related to the case can be tracked, photos and records of problems can be stored, and correspondence relating to technical issues maintained.

Once recorded, a case can be assigned to an engineer or team via the Assisted Scheduling module, and sent to them using the Eagle Mobile module.

Tasks can be added to cases, thereby instructing engineers to carry out specific duties or take certain readings. Outcomes may also be configured to assist case closure and analysis.

Integration with the Workflow functionality means that follow-up activities can be automatically triggered, such as sending emails, tasks or alerts as appropriate.

These may be conditional, based on the type of the call/case or the service level required.

Business to Business Users

Within the Call Centre Management module there are powerful and versatile search facilities to enable the user to quickly find the correct customer record.

This search function is also very effective when making enquiries on what actions have taken place on a case at any given point.

Users can use filters to search by product model, date ranges of work & jobs, completed calls within specific time frames, contact details, case problem criteria, progress action points, resolution, to name a few.

There are sub-filters for all key search criteria to assist the operator to find instant, up-to-date information.

Business to Domestic Users

When taking calls from domestic customers, users need to have the ability to log information without delay and ensure that customers receive good customer service.

The key to this is an efficient call logging system that takes the user through the various stages of the call without delays or confusing screens and processes.



Assisted Engineer Scheduling

The Eagle Scheduling Board uses assisted scheduling to aid the operator to select the right engineer the first time, every time.

Efficient and cost effective scheduling ensures customer satisfaction levels are kept at a maximum, whilst ensuring profitability and growth.

Users can schedule and manage calls, constantly monitor engineers' diaries (updated by the mobile solution to reflect real-time changes) and have the ability to view optimum time slots and spare availability.

Scheduling should be an easy task for any member of a service team, but often, specialist knowledge about engineer availability and skill levels is held by individuals within the team.

The Eagle Field Service Scheduling Board helps to unlock that knowledge in order that it is shared amongst all users, thereby allowing operatives to make the right decision every time with the aid of guidance and automatic assistance.

Designed with usability and simplicity in mind, panels can be activated/de-activated dependent on the role of the user, or spread over dual monitors.

The inbuilt and fully configurable rule engine selects which engineers to recommend based on criteria such as minimum distance, least cost or within SLA.

All recommendations take actual road mileage into account.

The system also offers a selection of booking slots/periods within the day, if your customers would prefer an appointment option.

Built-in mapping and routing helps visualise where the jobs are, by displaying other bookings on the chosen day for your selected engineers.

The Rule Engine

At the heart of the scheduling system is a rule engine, which is completely configurable to your business requirements.

The output from the rule engine creates a score against every engineer for every day that is being recommended and presents the best slots for the user to select, in a very easy to understand way.

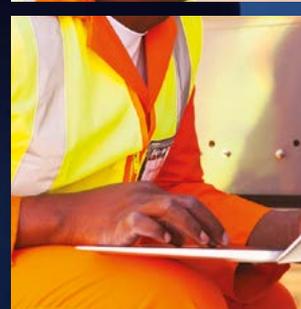
The rule engine can be altered to suit the needs of your operation, and different versions of the rule engine can be deployed at different times of the year, dependent on business demands.

Some of the rules used include engineer skills, actual road distances, capacity of engineer day, length of travel between cases, long travel home distances, response time and customer preferred engineer.



The business benefits of efficient engineer scheduling

- **Engineers spend less time travelling** and more time on-site working
- **Optimisation of jobs booked each day** to ensure best business practice
- **More efficient operators** making the best scheduling decisions
- **A Rule engine that is tailored** to your business requirements
- **At a glance access** of engineer availability for operators and management
- **Getting the right person to the job** to ensure a high first time fix rate for your customers



Engineer Mobile

Eagle Field Service allows service engineers real-time access to cases, visit information, schedules and documents via the Eagle Mobile solution.

Case updates are relayed in real-time to the back office management system, ensuring that company-wide mobile data and office-based information is unified throughout the company. This modern real-time solution works on or off-line on a variety of hardware devices, including smart phones and tablets.

Case information appears on an active jobs list once it is assigned to an engineer.

The engineer can then book activities via a series of events, which update the case in real-time.

Engineers can audit and update key customer information whilst on-site, as well as take photos, audio notes and videos, attach documentation and record customer signatures.

The capability for engineers to manage their own stock inventories is a key requirement within some organisations.

The Eagle Field Service mobile solution allows engineers to do this, along with placing purchase order requests, receiving goods directly to their locations and the ability to move stock to another engineer.

A key process for any business is to ensure that on-site engineers can capture and record specific information required by either your back office staff or your customer.

These site specific readings are relayed immediately to the back office and can trigger a series of remedial actions if required.



Purchasing & Stock

The Purchasing and Stock functionality within Eagle Field Service allows users to view and monitor stock levels in warehouses and vans. Re-order quantities can be defined by vehicle and part number.

When stock levels fall below defined minimum levels, a request for stock replenishment is automatically sent to the appropriate department. Additional parts not normally stocked may also be requested against a Call Centre case at any time, either by back office staff or the engineer in the field.

Stock deliveries can be routed to the engineer's address, drop box, to the customer or an ad-hoc address. Stock replenishment items sent through to engineers are visible as transit stock until they are received by the engineer.

Whilst Eagle Field Service is able to provide comprehensive Supplier Relationship Management capabilities, it also enables the engineer to be flexible by providing local purchasing functionality.

By allowing your engineers to purchase locally, as and when an item is needed, you can reduce overall stock levels, capital expenditure and potential stock obsolescence.

Invoicing

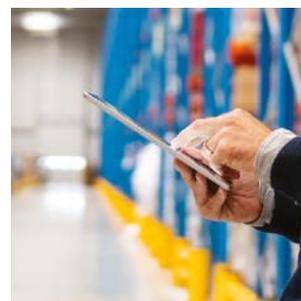
Designed for ease of use and powerful management reporting, the Eagle Field Service Invoicing and Financial module is an inherently flexible system for managing the invoicing requirements of any service orientated organisation.

The range of requirements catered for by Eagle Field Service include a comprehensive invoice generation routine, triggered off the back of a service call.

The ability to apply different hourly rates, part based charging or task based charging is also catered for. Additionally, regular automated maintenance contract invoicing features are also included along with a comprehensive, fully integrated Nominal, Sales and Purchase Ledger system.

Payments can be received by cheque, cash, bank transfer or by online payment solutions.

Optional links with third party insurers are also available to facilitate automated invoicing if required. Part sales (over and above engineer visits) are also a standard feature of the solution.



Web Self Service

Service Oriented Architecture (SOA) allows integration of the Eagle system with other systems, and websites.

Eagle provides a web service for use by Third Party software to interrogate and update information within the Eagle system.

This could 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.

Service CRM

Customer Relationship Management (CRM) is now an essential element of not just the Sales department, but also the Service department.

Service engineers are often an underutilised element of the salesforce.

'Service CRM' allows your engineers to truly capitalise on their close relationships with customers and see where additional value-add or sales opportunities exist.

Visibility of all communication between you and your customers is essential in a busy service department.

The Eagle Field Service Customer Relationship module provides users with a complete view of a customer account including addresses, contacts, financial history, site history, as well as all communications and activities.

Service CRM is all about interactions, not just sales. 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 Eagle CRM Console is one central place for accessing customer and prospect information which is displayed in tabs for ease of access.

Contact and Address information, Supported Products, Service Contracts, Call Centre Cases, Marketing Activity and Sales Opportunities are all visible, as well as Quotations, Sales Orders, Deliveries, Financial Reports, Notes, Communications and Documents.

Remote Engineers are able to access and amend company-wide information via the Mobile CRM application deployed on their smartphone or tablet device. This allows real-time access to information and ensures that back office and mobile data is unified throughout.

Broadcasting functionality offers the ability to target your marketing to specific customers and prospects via email within one integrated solution.

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



Wider EFACS Functionality

Eagle – Part of the EFACS E/8 ERP family of products

Eagle Field Service is only one part of the fully integrated suite of products authored by Exel.

If you are only looking for a Field Service Management system, Eagle includes all the relevant modules and functionality expected for use in this industry.

However, if you also manufacture your own products or have requirements for additional business software then you can access any part of the EFACS E/8 suite of products.

- **Manufacturing/Supply Chain**
- **Planning/Scheduling**
- **Contract/Project Control**
- **Quality/Non-conformance**
- **Financial Management**
- **Audit Trail**



Manufacturing & Supply Chain

Eagle Field Service is part of the fully integrated suite of products authored by Exel. If you manufacture or assemble your own products, as well as servicing them, then the Manufacturing and Supply Chain modules offer a complete solution from a single software supplier.

The Parts Master, Bill of Materials, Routing and Engineering Change Control modules provide the base data for the Manufacturing, Stock Management and Supply Chain functionality.

Eagle Field Service provides a comprehensive Supplier Relationship Management capability. The fully integrated Purchasing, Vendor Rating and Quality Concerns functionality provides users with the ability to score supplier performance, procure component parts & materials, and then record and progress quality incidents within the organisation.

Automatic procedures exist for placement, dispatch and receipt of purchase orders, making the system simple to use and efficient in operation.

For organisations where complex orders are involved, there is the option to use the Requisitions and Tendering module as an extension to standard Purchase Order Processing.



Planning & Scheduling

Production Planning and Scheduling enables you to plan and control the complexities of manufacturing many jobs, each composed of a series of operations using limited resources.

The Production Planning and Scheduling functionality includes the following components:

- **Finite Capacity Planning** - Takes into account the current shop floor loading, availability of work centres & operators, required skill levels, priorities, alternative work centres, etc.
- **Infinite Capacity Planning** - Aggregates loads onto work centres based on works order due date and manufacturing time.

Future over-load situations may therefore be predicted.

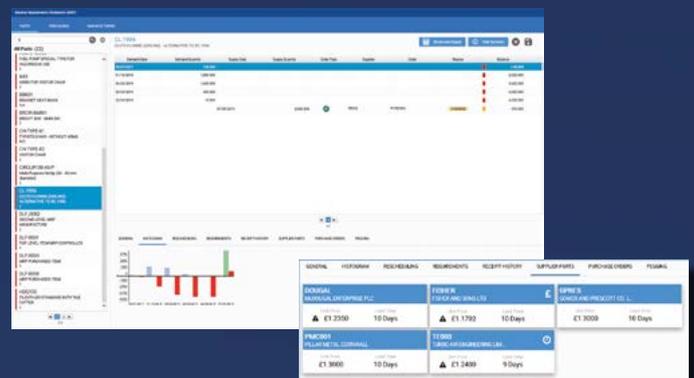
- **Material Requirements Planning (MRP)** - Provides a full breakdown of requirements

for component parts and materials, with a practically unlimited forward horizon.

The MRP Workbench provides a single, central application to manage the entire MRP process.

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

This is achieved by grouping demand from various sources and comparing it with existing production and stock levels.



Contract & Project Control

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.

This module provides a powerful system for defining a contract structure and maintaining contract information across all the stages, through to completion. 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 can 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.

Quality & Non-conformance

The Quality module allows users to record and drive incidents and quality concerns within their organisation.

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

Providing full integration with the rest of the Eagle system, the Quality module links directly with the supplier, works orders, stock, customers and workflow functionality.

The integration provides a defined set of quality processes to ensure control is maintained within the business, and the entire life cycle of a quality concern is managed correctly.

Workflow is central to the entire quality process and this element of the software can be used to insert process checks and approval stages into all activities and corrective actions.

Workflow is also used to automate the sending of emails, either internally or externally, to suppliers or customers for information and tasking purposes. All communications are stored in one central place for easy access, with the ability to view each individually.



Financial Management

The Financial Management module provides a fully integrated financial system, and includes:

- **Nominal Ledger & Cash Book**
- **Nominal Ledger Report Writer**
- **Sales Ledger**
- **Purchase Ledger**
- **Product & Job Costing**
- **Fixed Assets Register**
- **Landed Costs**
- **Multi-company**

A single, integrated solution from one supplier brings a huge number of benefits, including increased accuracy, a single source of information, time savings and improved efficiency.

Audit Trail

The Audit Trail module assists companies to meet compliance regulations by enabling them 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 information within Eagle is changed, who changed it and how it was changed.

The benefits of the Eagle Audit Trail system 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.



Established in Nottingham in 1985, the company is a leading force in the provision of integrated business solutions for field service providers.

Exel Computer Systems plc has implemented hundreds of systems, and there are thousands of users of their software in over 20 countries around the world. The key to their success lies with being a technology led Software Author, which is as true today as it was back in 1985.

Exel's longevity, a rare thing in the technology industry, can be attributed to the emphasis they place on continued product development and understanding real business needs through continuous support of, and close partnerships with their customer base.

Business as usual, only smarter.



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All trademarks are acknowledged.