



Idox Exacom

Service Description

September 2026

Commercial in confidence

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Introduction

Service Description

Idox is a partner of Exacom Systems Limited and the following suite of Exacom products can be purchased through Idox, either alongside other Idox solutions or as a standalone solution.

As the leading supplier of planning obligations software to local authorities across the UK, Exacom offers a range of web-hosted and user-friendly solutions for the monitoring and management of planning obligations and the delivery of community infrastructure.

Like Idox, Exacom has an excellent reputation for providing high quality, reliable products and excellent client support. Their staff are similarly made up of former local authority officers who have developed their products based on their unique insight into the operating circumstances local authorities face when working in planning obligations, enforcement and IT.

The Exacom Obligation Suite core products include:

- **CIL Administrator Module:** a comprehensive system for CIL governance in full compliance with statutory regs. It includes calculations, relief, abatement, notices, surcharges, finance, enforcement and reporting.
- **S106/S75 Administrator Module:** providing a comprehensive solution for managing legal agreements from individual covenant levels to infrastructure obligations. It records variations, monitors payments and tracks the delivery of infrastructure obligations across teams and services with a full audit trail.
- **Project Administrator Module:** a comprehensive project management tool for infrastructure funding allocation and expenditure tracking, delivery management, accounting, research and reporting.
- **Biodiversity Net Gain (BNG) Module:** designed for BNG monitoring and reporting. It enables the direct import of the DEFRA Metric workbook into the system. Features include reporting, enforcement, public access and API integration.
- **Building Safety Levy (BSL) Module:** the newest Exacom product launched in 2026, providing a complete software solution for the management, monitoring and collection of the Building Safety Levy with a full audit trail.
- **Public Facing Module (PFM):** a fully customisable dashboard through which the general public can independently view and interrogate planning obligations data. This is particularly useful for handling Freedom of Information requests and conveyancing enquiries.
- **Exacom Public Interface (EPI):** a data entry interface that facilitates the secure submission of external data for direct import into your Exacom system. This eliminates the need for manual entry and offers a paper-free workflow.
- **Spatial GIS Mapping Option:** providing site location mapping using background data from the OS DataHub via the Public Sector Geospatial Agreement, including local wards, parishes and CIL zones.

All Exacom software products are supported by an online user training video library and a helpdesk to answer queries and requests.

Exacom also offers bespoke planning obligations training through online sessions delivered by experienced CIL and S106 experts.

Key Module Software Products

Key Module Descriptions
CIL Administrator Module
This module is custom-designed for effective and efficient CIL governance in full accordance with statutory regulations throughout the life of the CIL application. Key features include: • User management including a granular permission structure to enable the administrator to allocate specific user access per section • An alerting system to prompt an administrator at key stages of the CIL application • A categorised document management system for the storage of category relevant documentation, with the ability to link to internal or external URLs and/or an existing DMS • The ability to store multiple parties and mark them as Liable Party, Interested Party, Parties with relief etc • Floor space / area calculator • Full finance calculator to calculate liable totals, surcharges, BCIS, receipts, existing use, demolition etc • Allocations calculator to view a breakdown of sums received per application • Payment policy management and allocations management for strategic, local etc • Planning application tracking from outline to reserved matters and between full applications and variations • RICS Index management • Decision monitoring by phased filtering including alerts • Relief monitoring section, with automatic clawback monitoring, land charge blocking and additional DMS facilities to store relief decision and policy documentation • Logging of land charges information, including CON29 reporting and the facility to either report or export to Land Charges to create or remove a land charge for a CIL liable development • Generation of CIL notices including liability, demand, stop, information, warning, acknowledgement and others • Fully compliant with WCAG 2.2 Level AA accessibility standard • Surcharge monitoring is linked to appeals, the system calculator and the notice generating system • Appeals monitoring is linked to the surcharges calculator and notice generation system

Key Module Descriptions

- Finance monitoring (including receipts) is linked to the current demand notice and client internal finance systems
- A bespoke import and export facility is available for importing and exporting to supported systems
- A reporting facility generates multiple reports from templates with customisable group access
- Event logging for auditing purposes
- Links to the Exacom S106/S75 Administrator, Project and PFM Modules are available (if purchased)
- Autofill is available for the Annual Infrastructure Funding Report template.

Please note: the CIL Administrator Module must be used in association with the Project Administrator Module to enable financial management.

Section 106 / Section 75 Administrator Module

This Module offers a complete software solution for the management and monitoring of Section 106 planning obligation legal agreements and the delivery of infrastructure obligations with a full audit trail.

Key features include:

- User management with a granular permission structure to enable administrators to allocate specific user access per section
- An alerting system to prompt administrators at key stages of the S106/S75 agreement
- A categorised document management system for storing category-relevant documentation with the ability to link to internal or external URLs and/or an existing DMS
- The ability to store multiple parties and mark them as 'Liable Party', 'Interested Party', Agent and so on
- Management of individual covenants and clauses
- A full finance section to monitor incoming and outgoing expenditure directly linked to the Exacom Project module
- An allocations calculator to view a breakdown of sums received per application
- Payment policy management as per the legal agreement
- Planning application linkage from outline to reserved matters and between full applications and variations
- Decision monitoring including alerts
- Logging of land charges information
- Generation of S106/S75 letters, receipts and demands with a mail merge facility directly to individual covenants
- Finance monitoring (including receipts) linked to the Exacom Project module

Key Module Descriptions

- A bespoke import and export facility to import and export to supported external systems
- A reporting facility to generate multiple reports from templates with customisable group access
- Event logging for auditing purposes
- Links to the Exacom CIL Administrator Module, Project Module and PFM (if purchased)
- Autofill for the Annual Infrastructure Funding Report template
- Fully compliant with WCAG 2.2 Level AA accessibility standard.

Please note: the S106 Administrator Module must be used in association with the Project Administrator Module to enable financial management.

Project Administrator Module

The Project Administrator Module provides a comprehensive financial and project management system for CIL and S106 funding, the Habitat Bank Management function for BNG and other funding sources.

Key features include:

- Infrastructure research section with an overview of all live projects including running totals of collected sums, allocated sums, spent sums, interest, returned sums and available sums over a specified period
- Drill-down function on totals to view associated data such as the source of sums and their expenditure and filter based on application details including ward and district
- Full user management including a granular permission structure to enable the administrator to allocate specific user access per section
- Administration and monitoring of individual projects including funding calculations, spending and returned sums against initial project estimations
- Allocation of funding to projects from CIL, S106/S75 (down to covenant level) and other sources
- Easy recording of spending on projects based on allocations
- Accounting for returned funds and reversals
- A categorised document management system to allow for the storage of category-specific documentation with the ability to link to an external DMS via URL
- Storage of multiple contacts including designation as liable parties, interested parties and partners
- Full audit trail and logging history
- Interactive links to Exacom S106/S75 Administrator and Exacom CIL Administrator modules

Key Module Descriptions

- Information supplied by the Project Module will assist in producing annual reports
- Direct links to the Public Facing Module (with back-office filtering) and the ability to send photos of delivered infrastructure to the Public Facing Module
- Autofill for the Annual Infrastructure Funding Report template
- Fully compliant with WCAG 2.2 Level AA accessibility standard.

Please note: the Project Administrator Module must be used in association with the CIL Administrator and S106 Administrator Modules to enable financial management, and with the BNG Module if Habitat Bank Management is required. The Project Module only needs to be purchased once for use with multiple Modules.

Building Safety Levy Module

Launching in June 2026 in advance of the introduction of the Building Safety Levy legislation in October 2026, the new BSL Module offers a complete software solution for the management, monitoring and collection of the Building Safety Levy. Sharing many common features with the popular and successful CIL Administrator software, the BSL Module's simple and logical approach and in-system help will enable authorities to quickly get to grips with managing and monitoring the new function.

Key features include:

- Two-way integration with your Building Control System (BCS) to move application data into Exacom and to provide completion data back to the BCS
- Support for external (RBCA & HRB Regulator) and PDF/Excel versions of the "data forms" via the Public Interface Module (if purchased)
- Integration with your existing Finance systems to facilitate financial tracking and corporate audit
- Integration with the gov.uk DELTA system to automatically return required quarterly data and draft the financial return for Section 151 Officer approval
- Case monitoring for each application pathway
- BSL calculations
- Reporting, spot checking and a live BSL dashboard
- Administration expenses tracker, including shared service level tracking
- Autofill template library
- Integrated Document Management System
- Workflow management, staging and customisable alerts
- Activity and event log diary
- Granular access for individuals and groups
- Works with the Exacom PFM and EPI at no additional cost if you have already purchased these

Key Module Descriptions

- Fully compliant with WCAG 2.2 Level AA accessibility standard.

Biodiversity Net Gain (BNG) Module

The BNG Module is an easy-to-use system for managing compliance with mandatory Biodiversity Net Gain requirements, including metric import, review and reporting. Like our other modules, the BNG system is a web-based application accessed via a corporate desktop. Data can be entered manually or imported directly from the DEFRA BNG Metric Excel workbook for monitoring and review.

Key features include:

- User-friendly interface for viewing imported habitat data
- Recording of site details including offsite address data
- Recording of relevant parties such as developers and landowners for use in notices and letters
- Recording of developer purchases of Statutory Off-site credits from the Secretary of State including the units purchased and the type of units being offset
- Access to the Document Management System (DMS) to allow officers to upload data such as copies of correspondence and monitoring reports
- Comprehensive Review System with the ability to upload monitoring reports and other documents such as photographs against review records
- Workflow management system that will alert officers to missing data, upcoming reviews or user-set deadlines
- Officer Activity Planning/Diary to allow officers to keep centralised notes on actions taken or planned for a site
- User permissions to allow administrators to limit what officers can and cannot see or edit within the system as needed
- Full reporting system including a one-click statutory quantitative data report
- Enforcement module to track and record action taken
- A notices and letters library with templates for the auto-generation of documents using system data
- PFM integration (where purchased), including the display of BNG sites, their uplifts, a data dashboard and a data feed API for third-party access
- Spatial mapping down to the individual habitat level

Please note: the Project Administrator Module must be used in association with the BNG Module if Habitat Bank Management is required.

Public Facing Module (PFM)

Public Facing Module (PFM) is a public facing webserver which displays information from your core Exacom system's dashboard in an easy to understand and user-friendly format.

Key Module Descriptions

Through a link on your council's website, the PFM enables members of the public to interrogate all aspects of planning obligations data in its varying stages – detailing financial and non-financial obligations which are pending, due, received, allocated, spent and discharged.

Information is updated from the back-office system on a daily basis, and can be filtered by date ranges, Neighbourhood Zones, Wards, covenant types and more for fast and efficient searching.

Tools for saving and printing are also included to enable users to transfer research data to paper or PDF.

The PFM can be customised to suit your individual needs and preferences, giving you complete control over your data and external access to it. It is particularly useful for responding to formal external enquiries such as FOI requests and conveyancing queries, essentially allowing anyone to 'serve themselves' with your data as required.

Other key features include:

- An online CIL Calculator through which developers and members of the public can work out the basic CIL charge for development in their area based on calculation data sets stored in the back-office CIL Administrator system
- A lookup area to search for any planning application and view its details, including the answers to the CON29 questions
- Easy viewing and downloading of original S106 deed documents in PDF format
- The ability to show S106 Affordable Housing and Car Free data
- The ability to view BNG Cases in the Authority's area
- A project milestone diary to enable communities to keep up to date with the delivery of local schemes and initiatives, including targets, review dates and uploaded photos of work in progress.
- A public register of BSL liabilities (outstanding and paid for) will be available through the PFM.

Live examples of public Exacom PFMs:

Waverley Borough Council: <https://pfm.exacom.co.uk/waverley/index.php>

London Borough of Sutton: <https://pfm.exacom.co.uk/sutton/index.php>

Exacom Public Interface

The Exacom Public Interface (EPI) is a new collection of public-facing data entry interfaces designed to enable members of the public to submit data directly to your Exacom system in a secure and paper-free environment.

Rather than relying on scanned hard copy documents received via post or email attachments, the EPI allows data to be submitted securely and digitally to your authorised officer(s) through the Exacom system itself.

Key Module Descriptions

Key features include:

- EPI with the CIL Module – a fully digital CIL forms submission system, including the ability to submit supporting documents alongside the forms
- EPI with the S106 Module – a selection of interfaces to enable the submission of data for S106 compliance monitoring and covenant discharge, including Affordable Housing delivery
- EPI with the BSL Module – an external application submission portal for initial notices and higher risk building applications (submitted via the Regulator), including the ability to submit supporting documents.

Upon receipt, data is held in a waiting area until it is either accepted for import into the Exacom live system or referred back to the sender by authorised officers.

“Since its launch, the EPI has been successful in saving time and effort by eliminating the need to re-key and upload every CIL form and attachment received.

Agents and developers have seamlessly transitioned to the EPI forms after the change in links was implemented without hesitation.

The instant submission of multiple forms and the automation of certain fields are also contributing to the education of incomplete forms received and rejected”.

Gavin Calthorpe - Business Development Manager, London Borough of Sutton

Associated Services

Optional Software Features

Optional Software features include:

- **Finance Connector:** An optional basic financial connector is included as part of your licence. This connector allows the Exacom system to integrate with your finance system to post Demand Notices for accounting and to receive receipts data back as payments are made. Data is transferred via SFTP in CSV format. Note: this connector will also be offered via API from late 2026 onwards.
- **Land Charges Connector:** An optional basic Land Charges connector is included as part of your licence. This allows CIL data relevant to the LLC registrations and Con29 to be sent to a Land Charges system. Note: this connector will also be offered via API from late 2026 onwards.
- **Spatial GIS Mapping:** An optional Spatial GIS Mapping add on is available as part of your licence which enables site location maps to be displayed against records in the CIL, S106, BSL, BNG and Project Modules. Please note that this feature is only available if:
 - Your Council has access to the OS Data Hub to set up a project to obtain an API Key and Secret and

- A copy of your Public Sector Geospatial Agreement contractor's license can be submitted to Exacom.
- **LGR Multiple Data Flows:** The setup of multiple data flows for applications import and land charges export for merging/merged authorities is included as part of your license, provided that unique identifier details (for example wards, parishes, districts) can be provided to inform application filtering.
- **Idox Built Environment Integration:** Idox Built Environment software provides direct integration with the Exacom suite.

Value Proposition

Idox Built Environment customers adding the market leading Exacom suite products to their landscape will benefit from a single account management model under the Idox umbrella, along with seamless integration between the in-scope Exacom modules and the Idox solution.

Managed Services and Security

Data Protection standards and procedures

Exacom is committed to using, managing and holding information in full accordance with industry standards.

A Data Protection Agreement will be included as part of the terms and conditions of any contract signed for the purchase of Exacom software. Exacom is the Processor of information, and the client is the Controller of the information. The only processing that Exacom can undertake is that authorised by client and may not be determined by Exacom.

Exacom has held Cyber Essentials accreditation since 2021.

Hosting infrastructure

Data is stored in ANS Group Limited, in Manchester, UK – ANS holds a range of ISO accreditations including ISO 9001, ISO 27001 and ISO 27018.

Backup/DR services are maintained in Microsoft Azure in their UK-South datacentre.

The service also adheres to a range of other security best practice protocols, such as encryption of data at rest, regular penetration testing, strict password management, a full disaster recovery plan and industry standard data cleansing.

Privacy by design

Exacom observe the NCSC 14 Cloud Security Principles. Data is encrypted at rest, and in transit, while multifactor authentication is supported.

Accessing the Service

Ordering and invoicing

The order will be completed by return of the signed G-Cloud contract and invoicing will be issued as per the schedule set out in the contract.

Pricing overview

Please see the associated pricing document.

Onboarding

Onboarding for our web-hosted software is simple and efficient, and in normal circumstances runs according to the following schedule:

- Agreement and signing of the contract by both parties and issue of the purchase order by the customer
- Initial kick off meeting held
- Electronic submission of the System Set Up Form by the customer
- Client IP whitelisting and firewall configuration
- Test system deployment, including SFTP set up, connectivity test and URL provision
- Template bespoke work as instructed by the customer
- Application import set up via connector or bespoke arrangement according to requirements
- Programming of CIL Charging Schedule (if required)
- Set up of customer Key Administrators
- Application data migration for record creation
- User training and programming of admin settings by the customer
- Live system deployment when authorised by the customer.

If you are an existing Exacom customer, adding on new Modules will often be a simple 'switch on' into your live system as soon as the purchase order is received as the IT set up will already be in place.

Data migration

Historic data upload services can be provided by the Exacom partner organisation The Obligations Office Limited (Obs Office) if required.

Projects are undertaken by a professional team of Data Officers via an Exacom-managed dedicated server. The Obs Office Data Team are also subject to Exacom's own security and confidentiality rules and procedures.

Obs Office is the only company licensed by Exacom for secure third-party access to the software, meaning that work can take place directly and securely on your live system without the need for staff to log in through your corporate servers or desktops.

Key services include:

- **S106 Historic Data Upload:** a full deed and covenant uploading service, with options for additional services such as pdf processing, deed redaction, finance data

uploading, monitoring document upload to the Document Management System and extended upload of Affordable Housing obligations.

- **CIL Historic Data Upload:** upload of historic CIL records for Mayoral and/or local CIL into your live Exacom system, including liable parties, commencement dates, form receipt dates, calculation data (total floorspace, existing use and demolition), relief, surcharges and neighbourhood zones, with options for document redaction, finance data upload, data research and the upload of historic forms and notices to the Document Management System.
- **Existing Data Audit and Upgrade:** a full audit of your live Exacom system(s) to identify issues or areas for improvement. A full report will make suggestions for follow up actions by your Planning Obligations team, or provide a quote for Obs Office to undertake the work if preferred. Ideal for 'spring cleaning' your data in preparation for audit, opening up your Exacom Public Facing Module or simply improving the accuracy and efficiency of your monitoring and reporting.
- **S106 Bureau:** upload of newly signed deeds and associated covenants into your live Exacom system as they complete – freeing up your S106 staff from a time-consuming admin task and ensuring that your S106 records are properly and consistently maintained. S106 Bureau is particularly recommended for Planning Obligations teams facing challenging workloads or coping with long term staff vacancies.

Training

An extensive Training Video Library covering all modules is permanently available on Exacom, which can be used for initial training when you take on an Exacom Module, and also by any new staff who join your team in the future.

In addition, as part of the onboarding package, an in-person training session for each Module purchased is available for staff who have completed the video training. This session will be hosted by one of our in-house specialists and offers the opportunity to ask questions, seek any clarification required and consolidate the video-based learning.

Exacom also operates regular specialist training workshops throughout the year for a limited number of delegates. For more information, please contact admin@exacom.co.uk

Helpdesk

Standard Helpdesk Service is available Monday to Friday between 9am and 5pm (excluding Bank Holidays).

Our helpful Support staff can be contacted via telephone or e-mail for advice and assistance on technical queries, issues and best practice use of the software.

Off-boarding

Bespoke exit plans will be agreed by arrangement as required.

When notice is given by either party, arrangements will be made for secure data transfer (usually via .csv file) followed by an industry standard cleanse of data.

Customer Relationship Management

We are committed to building collaborative and lasting relationships with our customers to ensure they realise the maximum return on their investment throughout the term of the contract. As a key element of this close ongoing engagement, we appoint a dedicated Account Manager to be the regular point of contact with Idox. The Account Manager is responsible for contract and commercial matters relating to your investment in both your Idox products and the Exacom suite.

Additionally, within the Exacom system all customers have access to a User Request Forum, through which any system user can post recommendations and requests for improvements or updates to the software. Other users can see anything that's been posted and add further comments and suggestions if they want to. The Exacom Technical Support Team will review and reply to these requests and provide details on the viability and any action to be taken as a result.

The vast majority of the requests received through the User Forum have been approved and implemented as part of regular system updates, ensuring that our software improvement is user driven and responsive to evolving needs.

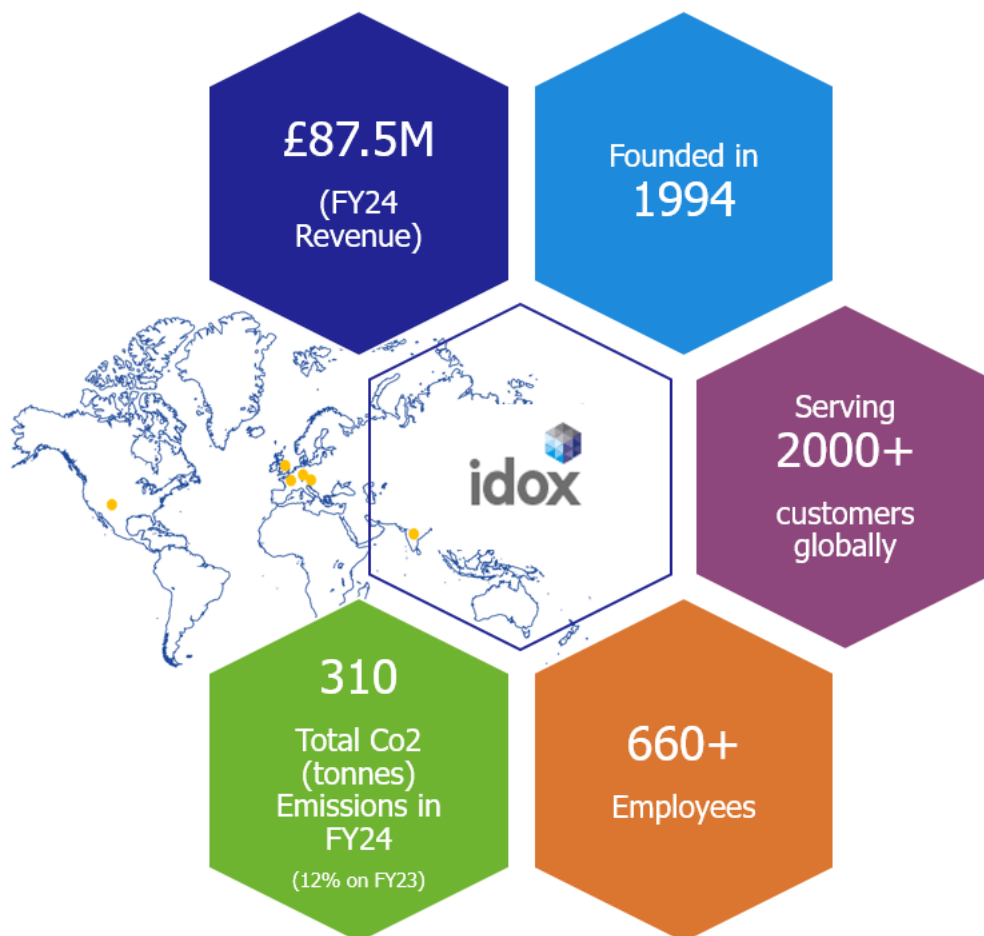
About Idox

As a UK based organisation with a long and enduring history supporting government in the UK and around the world, we design the smart digital solutions that help public sector organisations work better, stay compliant, and engage more effectively with citizens.

Our platforms are secure, scalable, and built to meet UK government standards. They support accessibility and strong data protection, following GDPR and ISO-certified processes. This means organisations can modernise services, optimise costs, and deliver better outcomes for their communities.

We make it easy for public sector teams to access our full range of services (cloud software, and support) through the Digital Marketplace. This streamlined approach saves time and removes the complexity of traditional procurement.

With a strong presence across the UK and over 650 colleagues, we are a trusted partner for digital transformation, bringing proven expertise, reliable technology, and a commitment to helping organisations achieve their goals. Whether it's improving efficiency, meeting regulatory requirements, or creating better experiences for citizens, we are here to empower you to *do more*.



Social Value

We are dedicated to running a business that both helps our customers do more and is good for everyone, our customers, our employees, and the world around us.

Here's how we make a positive impact:

- **Helping communities and the environment:** Our software makes government services better, from planning to health care, making life easier for people and looking after the environment.
- **Investing locally:** We give back to local communities through donations and we support local charities with our MyFunding Central platform which provides smaller local charities and voluntary organisations with free access to thousands of grants and social investment opportunities from local, national, and international funding sources.
- **Supporting local charities:** We help our customers give back to their communities by supporting local charities. Our employees also get involved through volunteering to support local communities and charity projects.
- **Protecting the environment:** We're already a naturally low emission business but we've committed to further reducing our carbon footprint, aiming to be carbon neutral by 2040. We cut down on energy use, limit travel, promote eco-friendly practices and have adopted the three scopes of the Greenhouse Gas Protocol (GHG) across our business.
- **Doing the right thing:** We believe in fairness and respect for everyone. Our workplaces are inclusive and safe, with fair pay and opportunities for growth and we prioritise diversity, employee well-being, and security in everything we do. Our employees benefit from our extensive range of range of employee benefits and family friendly working policies as well as leadership training and employee advocacy groups such as Idox Elevate, Pride@Idox, Neurodiversity@Idox, and Workplace Wellbeing.
- **Meeting standards:** We hold ourselves to high standards, with certifications like ISO27001 and ISO14001. We're committed to ethical business practices, including no tolerance for slavery in our supply chain, and prompt payment to suppliers either in line with Public Procurement Contract Regulations 2015 and its amendments or within 45 days.



Contact us

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