Frontline
IT Consultancy

FRONTLINE CONSULTANCY AND BUSINESS SERVICES LTD

SAP Business One

SERVICE DEFINITION DOCUMENT

Frontline IT Consultancy

Document Control

Prepared by

Version	Author	Date
V1.0	Phil Burgess	15/10/2025

Reviewed by

Name	Position	Date
V1.1	Tony Hilton	23/10/2025

Distribution

Name	Position	Date

Contents

1. Introduction

Frontline Consultancy and Business Services is a trusted provider of ERP solutions with over 25 years of experience. Their SAP Business One practice empowers small and medium-sized enterprises (SMEs) across industries, including manufacturing, distribution, and services, with tailored, cloud-based ERP solutions that unify finance, operations, sales, and customer service.

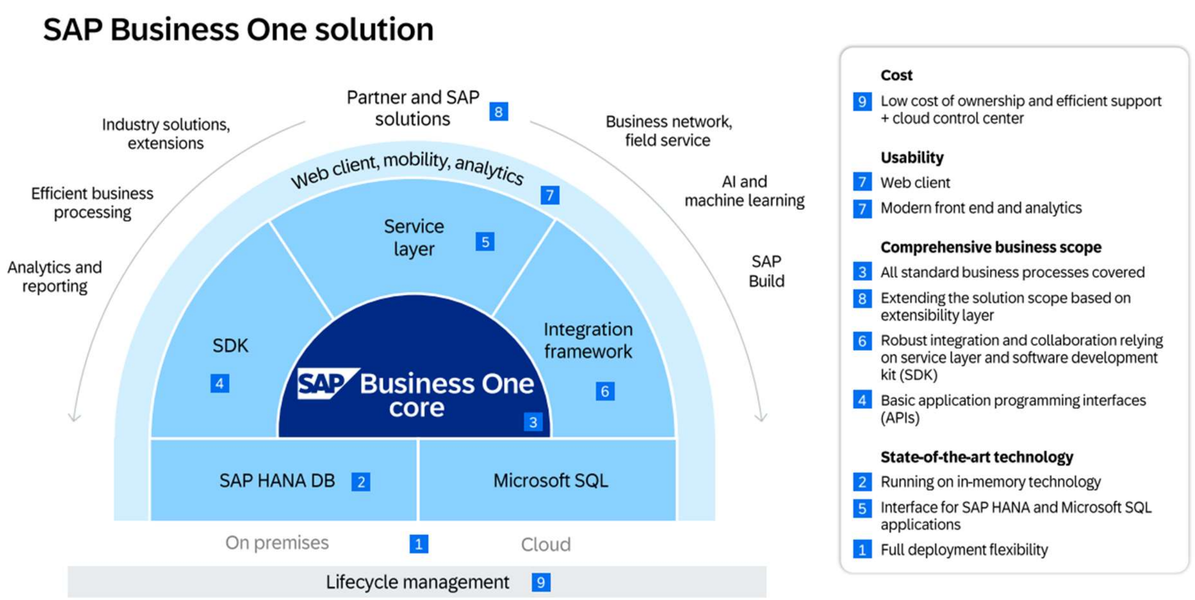
2. Service Overview

Service Name: SAP Business One Implementation & Support

Service Description: SAP Business One is a comprehensive, affordable ERP solution designed specifically for small to midsize businesses. It integrates all core business functions into a single system, providing real-time visibility, streamlined operations, and data-driven decision-making.

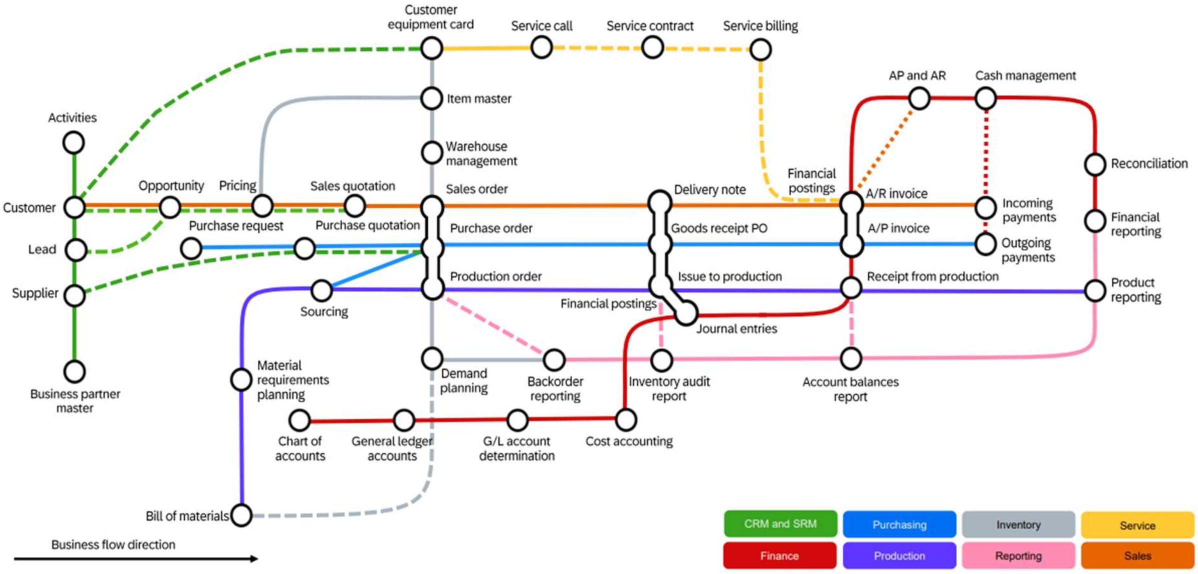
Key Benefits

- **End-to-End Integration**: Connects finance, sales, purchasing, inventory, production, Service and more.
- **Real-Time Insights**: Built-in dashboards and analytics for smarter decisions.
- **Scalable and Flexible**: Available on-premise or in the cloud, with mobile access.
- **Industry-Ready**: Adaptable to manufacturing, retail, wholesale, services, and more.



Frontline offers a comprehensive ERP implementation and support service designed to streamline business operations, improve decision-making, and enable scalable growth through SAP Business One.

SAP Business One process metro map



3. Key Features and Capabilities

SAP Business One is built around a suite of fully integrated core business functions, delivering a unified platform that streamlines daily operations, drives profitability, and enhances customer satisfaction. By connecting finance, sales, inventory, production, and more, SAP Business One empowers growing businesses to operate smarter, faster, and more efficiently.

[AWAITING NEW GRAPHIC TO MATCH BUSINESS FUCNTIONS BELOW]

Financial Management

This module is the backbone of SAP Business One, providing comprehensive tools to manage and automate financial processes, ensure compliance, and deliver real-time financial insights.

Key Financial Management Capabilities

General Ledger (GL)

Purpose: Central repository for all financial transactions.

Features:

- Chart of accounts tailored to local regulations and business needs.

- Real-time updates from all modules (sales, purchasing, inventory).
- Automatic journal entries from operational transactions.

Journal Entries

Record and track financial transactions manually or automatically.

Features:
- Recurring entries and templates for efficiency.
- Reversals and corrections.
- Audit trail for compliance and transparency.

Accounts Payable (AP) and Accounts Receivable (AR) - Manage incoming and outgoing payments.

Features:
- Invoice processing and payment scheduling.
- Aging reports and credit management.
- Integration with purchasing and sales modules.

Banking and Reconciliation - Handle cash flow and bank transactions.

Features:
- Bank statement import and reconciliation.
- Payment processing (cheques, transfers, direct debits).
- Cash flow forecasting and liquidity management.

Fixed Asset Management - Track and manage company assets.

Features:
- Asset acquisition, depreciation, and disposal.
- Multiple depreciation methods (straight-line, declining balance, etc.).
- Integration with purchasing and accounting.

Budgeting - Plan and monitor financial performance.

Features:
- Budgets per GL Account.
- Real-time comparison of actual vs. planned figures.
- Alerts for budget overruns.

Multi-Currency and Multi-Company Support - Enable global operations.

Features:
- Currency conversion and exchange rate management.
- Localisation for tax and regulatory compliance.
- Multiple company instances, running to different regulations on a single platform.

Financial Reporting and Analysis - Provide insights for decision-making.

Features:
- Standard reports (balance sheet, P&L, cash flow).
- Custom report creation using drag-and-drop tools.
- Integration with Excel and SAP Crystal Reports.

Tax Management - Ensure compliance with local tax laws.

Features:
- VAT/GST configuration and reporting.
- Automatic tax calculation on transactions.
- Support for electronic tax filing in some regions.

Sales & Customer Management

This module helps businesses manage the entire customer lifecycle—from lead generation to after-sales service, while improving customer relationships, sales efficiency, and revenue growth.

Key Sales & Customer Management Capabilities

Sales Process Management - Automates and tracks the full sales cycle to improve accuracy, speed, and customer satisfaction.

Features:

- Sales Quotations: Create and send quotes to prospects.
- Sales Orders: Convert quotes into orders with real-time inventory checks.
- Deliveries and Invoicing: Manage shipping and billing seamlessly.
- Returns and Credit Memos: Handle post-sale adjustments efficiently.

Customer Relationship Management (CRM) - Centralises customer data and interactions to support better engagement and retention.

Features:

- Contact Management: Store and manage customer and prospect details.
- Activity Tracking: Log calls, meetings, emails, and follow-ups.
- Opportunity Management: Track sales opportunities through stages.
- Customer History: View complete interaction and transaction history.

Marketing Campaign Management - Enables targeted marketing efforts to generate leads and nurture customer relationships.

Features:

- Campaign Planning: Define objectives, target groups, and timelines.
- Execution and Tracking: Monitor campaign performance and ROI.
- Lead Management: Capture and qualify leads from campaigns.

Service Management - Supports post-sales service operations to enhance customer satisfaction and loyalty.

Features:

- Service Contracts: Manage warranties and service agreements.
- Service Calls: Log and track customer support requests.
- Response Time Monitoring: Ensure timely resolution of issues.
- Knowledge Base: Store solutions and FAQs for quick reference.

Reporting and Analytics – Provides insights into sales performance, customer behaviour, and service efficiency.

Features:

- Sales Reports: Analyse revenue, margins, and trends.
- Customer Reports: Segment and evaluate customer value.
- Opportunity Analysis: Forecast sales and identify bottlenecks.
- Service Reports: Track resolution times and customer satisfaction.

Integration with Other Modules - Seamlessly connects with inventory, finance, and production to ensure smooth operations.

Features:

- Inventory Availability: Real-time stock checks during sales.
- Pricing and Discounts: Automated pricing based on customer groups or campaigns.
- Financial Impact: Automatic journal entries and invoicing.

Purchasing and Inventory Control

This module helps businesses manage procurement, supplier relationships, and inventory levels efficiently. It ensures that stock is available when needed, costs are controlled, and purchasing decisions are data-driven.

Key Purchasing and Inventory Control Capabilities

Procurement Management – Streamlines the purchasing process from requisition to payment, ensuring timely and cost-effective procurement.

Features:

- Purchase Requests: Internal requests for goods or services.
- Purchase Quotations: Request and compare supplier quotes.
- Purchase Orders: Create and manage orders with suppliers.
- Goods Receipt PO: Record incoming goods and update inventory.
- Returns and Credit Memos: Handle supplier returns and adjustments.

Vendor Management - Centralises supplier information and performance tracking to support strategic sourcing and negotiation.

Features:
- Supplier Master Data: Store contact details, payment terms, and history.
- Price Lists and Agreements: Manage negotiated prices and contracts.
- Performance Analysis: Evaluate delivery times, quality, and reliability.

Inventory Management - Provides real-time visibility and control over stock levels, movements, and valuation across multiple locations.

Features:
- Warehouse Management: Track inventory across multiple warehouses and bins.
- Item Master Data: Define items with units, dimensions, and costing methods.
- Stock Transfers: Move inventory between locations.
- Inventory Counting: Perform cycle counts and full stock takes.

Material Requirements Planning (MRP) - Forecasts demand and automates procurement and production planning to avoid stockouts or overstocking.

Features:
- Forecasting: Predict future demand based on historical data.
- Planning Scenarios: Simulate different supply and demand conditions.
- Recommendations: Generate purchase and production orders automatically.

Batch and Serial Number Tracking - Enables detailed tracking of inventory for quality control, compliance, and traceability.

Features:
- Batch Management: Track groups of items with shared characteristics.
- Serial Number Tracking: Monitor individual items for warranty and service.
- Expiry Date Management: Useful for perishable goods or regulated industries.

Inventory Valuation and Costing - Supports multiple costing methods to accurately value inventory and calculate margins.

Features:
- Costing Methods: FIFO, moving average, standard cost, batch / serial costing.

- Inventory Revaluation: Adjust item costs based on market or operational changes.
- Audit Trail: Full traceability of inventory value changes.

Reporting and Analytics - Offers insights into purchasing trends, inventory turnover, and supplier performance to support strategic decisions.

Features:

- Purchase Analysis Reports: Track spend by supplier, item, or category.
- Inventory Status Reports: Monitor stock levels and availability.
- Slow-Moving Items: Identify underperforming inventory.
- Supplier Performance Dashboards: Visualise delivery and quality metrics.

Production and Operations (Manufacturing)

This module is designed to support light manufacturing and production planning. It helps businesses manage bills of materials, production orders, resource allocation, and cost tracking to ensure efficient operations and product delivery.

Key Production and Operations Capabilities

Bill of Materials (BOM) Management - Summary: Defines the structure of manufactured products, listing components, quantities, and resources required.

Features:

- Multi-Level BOMs: Support for complex assemblies with nested components.
- Types of BOMs: Standard, sales, assembly, and template BOMs.
- Version Control: Track changes and revisions to BOMs.
- Costing Integration: Automatically calculates product cost based on components.

Production Orders - Manages the execution of manufacturing processes from planning to completion.

Features:

- Order Creation: Generate production orders manually or via MRP.
- Issue for Production: Allocate raw materials and components.
- Receipt from Production: Record finished goods and update inventory.
- Order Status Tracking: Monitor progress and completion.

Resource Management - Tracks and allocates production resources such as labour, machines, and tools.

Features:

- Resource Master Data: Define capabilities, costs, and availability.
- Capacity Planning: Visibility over resource capacity and planned utilisation.
- Utilisation Reports: Analyse resource efficiency and bottlenecks.

Routing and Operations - Defines the sequence of operations required to produce a product.

Features:

- Operation Steps: Assign tasks to work centres or resources.
- Time and Cost Estimates: Plan labour and machine time per operation.
- Routing Stages, Raw Materials and Resources all together on the BOM for optimum management.

Cost Tracking and Analysis - Provides visibility into production costs to support pricing and profitability analysis.

Features:

- Direct and Indirect Costs: Track material, labour, overhead, and resource usage.
- Standard vs. Actual Costing: Compare planned vs. real production costs.
- Variance Analysis: Identify cost deviations and root causes.

Material Requirements Planning (MRP) Integration - Ensures production is aligned with demand forecasts and inventory levels.

Features:

- Demand Forecasting: Use historical data to predict future needs.
- Supply Planning: Generate production and purchase orders.
- Inventory Synchronisation: Avoid overproduction or stockouts.

Reporting and Analytics - Offers insights into production efficiency, costs, and resource utilisation.

Features:

- Production Reports: Track order status, output, and scrap.

- Resource Utilisation Dashboards: Visualise workload and performance.
- Cost Analysis Reports: Review profitability by product or batch.

Project Management

This module enables businesses to plan, execute, and monitor projects with full integration into financials, operations, and resource management. It's ideal for service-based industries, internal initiatives, Research and Development or any business needing structured project oversight.

Key Project Management Features & Capabilities

Project Setup and Structure - Allows users to define and organise projects with clear hierarchies and objectives.

Features:
- Project Definition: Create projects with start/end dates, budgets, and responsible owners.
- Phases and Tasks: Break down projects into manageable components.
- Milestones: Set key checkpoints to track progress and deadlines.
- Link to Business Documents: Associate sales orders, purchase orders, and production orders with specific projects.

Budgeting and Cost Control - Helps monitor financial performance of projects to ensure profitability and avoid overruns.

Features:
- Budget Allocation: Assign budgets to phases, tasks, or resources.
- Actual vs. Planned Comparison: Track real-time spending against forecasts.
- Alerts and Thresholds: Notify users when costs exceed limits.
- Integrated Financials: Automatically reflect project-related transactions in accounting.

Document and Communication Management - Centralises project-related documents and communications for better collaboration.

Features:
- Document Linking: Attach contracts, designs, and communications to projects.

- Activity Logs: Record meetings, calls, and updates.
- Internal Notes: Share updates and instructions within the team.

Reporting and Analytics - Provides visibility into project performance, profitability, and resource usage.

Features:

- Project Dashboards: Visualise KPIs like budget usage, task completion, and profitability.
- Cost and Revenue Reports: Analyse financial outcomes by project or phase.
- Timeline Views: Track progress against deadlines.
- Custom Reports: Build tailored views for stakeholders.

Integration with Other Modules - Ensures seamless coordination between project management and core business functions.

Features:

- Sales and Purchasing: Link orders and invoices to projects.
- Inventory and Production: Allocate materials and track usage.
- Financials: Reflect all project-related transactions in accounting and reporting.

Reporting and Analytics

This module empowers businesses with real-time insights, decision support, and performance tracking across all departments. It combines built-in reports, dashboards, and advanced analytics tools to help users make informed, data-driven decisions.

Key Reporting and Analytics Capabilities

Standard Reports - Provides out-of-the-box reports across all business functions for quick access to operational and financial data.

Features:

- Financial Reports: Balance sheet, profit & loss, trial balance, cash flow.
- Sales Reports: Sales analysis by customer, item, region, or rep.
- Purchasing Reports: Supplier performance, purchase history, cost analysis.
- Inventory Reports: Stock levels, valuation, slow-moving items.

- Production Reports: Order status, resource usage, cost variance.

Custom Report Creation - Enables users to build tailored reports to meet specific business needs using intuitive tools.

Features:
- Query Generator: Create SQL-based reports without coding.
- Drag-and-Drop Tools: Design reports using visual interfaces.
- Crystal Reports Integration: Build advanced, formatted reports with SAP Crystal Reports.
- User-Defined Fields: Include custom data points in reports.

Dashboards and KPIs - Offers visual, real-time dashboards to monitor key performance indicators across departments.

Features:
- Role-Based Dashboards: Tailored views for finance, sales, operations, etc.
- Interactive Charts and Graphs: Drill down into data for deeper analysis.
- Alerts and Notifications: Triggered by KPI thresholds or anomalies.
- Embedded Analytics: View dashboards directly within SAP Business One screens.

Excel Integration - Allows users to export and analyse data in Excel for flexible reporting and modelling.

Features:
- Live Data Connection: Refresh reports with real-time SAP data.
- Pivot Tables and Charts: Use Excel's native tools for analysis.
- Templates: Save and reuse report formats for consistency**.**

SAP HANA-Powered Analytics (if applicable) - Leverages in-memory computing for advanced analytics and faster performance.

Features:
- Predictive Analytics: Forecast trends and behaviours using historical data.
- Real-Time Processing: Instant insights from large datasets.
- Advanced Visualisations: Interactive dashboards with drill-down capabilities.
- Semantic Layer: Simplifies data access for non-technical users.

Audit and Compliance Reporting - Supports regulatory compliance and internal controls through transparent reporting.

Features:

- Audit Trails: Track changes and user actions across the system.
- Tax Reports: VAT/GST summaries and filings.
- Document History: View lifecycle of transactions and approvals.

Mobile and Remote Access - Enables access to reports and dashboards from mobile devices for on-the-go decision-making.

Features:

- Mobile Apps: View KPIs and reports on smartphones and tablets.
- Web Access: Secure browser-based reporting.
- Real-Time Sync: Ensure data is always current across platforms.

Mobility and Integration

This module enhances flexibility and connectivity by enabling mobile access to business data and integrating SAP Business One with other systems and platforms. It supports real-time decision-making, remote work, and seamless data flow across the enterprise.

Key Mobility and Integration Capabilities

Mobile Access - Empowers users to access key business functions from anywhere using mobile devices, improving responsiveness and productivity.

Features:

- SAP Business One Mobile App: Available for iOS and Android.
- Sales and Service Functions: Create quotes, view customer data, approve documents, and manage service calls.
- Real-Time Data Access: View dashboards, reports, and KPIs on the go.
- Push Notifications: Alerts for approvals, tasks, and updates.

Web Client - Provides browser-based access to SAP Business One with a modern, intuitive interface.

Features:

- No Installation Required: Access via any web browser.
- Role-Based Views: Tailored interfaces for sales, finance, and operations.
- Real-Time Collaboration: Share data and insights across teams.
- Secure Access: Encrypted communication and user authentication.

Integration Framework - Facilitates seamless integration with third-party applications, cloud services, and other SAP solutions.

Features:

- API Support: REST and SOAP APIs for custom integrations.
- Event-Driven Architecture: Trigger actions based on system events.
- Data Mapping Tools: Simplify data exchange between systems.

Microsoft Office Integration - Enhances productivity by linking SAP Business One with familiar Office tools.

Features:

- Excel Integration: Export and analyse data with live connections.
- Outlook Integration: Sync contacts, emails, and calendar events.
- Word Templates: Generate documents like quotes and invoices.

SAP Integration (e.g., SAP HANA, SAP Analytics Cloud) - Connects SAP Business One with other SAP platforms for advanced analytics and enterprise-wide visibility.

Features:

- SAP HANA: In-memory computing for faster data processing and analytics.
- SAP Analytics Cloud: Advanced BI and planning capabilities.
- SAP Business Network: Integration with suppliers and partners.

Cloud and On-Premise Deployment - Offers flexible deployment options to suit different business needs and IT strategies.

Features:

- Cloud Hosting: Managed by Frontline for scalability and reduced IT overhead.
- On-Premise: Full control over infrastructure and customisation.
- Hybrid Models: Combine cloud and on-premise for specific use cases.

Security & Compliance

This module ensures that business data is protected, user access is controlled, and operations comply with legal and regulatory standards. It supports secure system usage, auditability, and data integrity across all business functions.

Key Security and Compliance Capabilities

User Roles and Permissions - Controls access to system functions and data based on user roles to ensure security and accountability.

Features:

- Role-Based Access Control (RBAC): Assign permissions based on job functions.
- Granular Permissions: Control access to specific modules, reports, and fields.
- Approval Workflows: Enforce multi-level approvals for sensitive transactions.
- Audit Trails: Track user actions for accountability and compliance.

Data Security - Protects sensitive business data from unauthorised access and breaches.

Features:

- Encryption: Secures data in transit and at rest.
- Secure Login: Supports password policies, two-factor authentication (2FA), and session timeouts.
- Database Security: Controlled access to backend systems and data.
- Regular Backups: Automated and manual backup options to prevent data loss.

Audit and Activity Logging - Provides full visibility into system usage and changes for internal control and external audits.

Features:

- Change Logs: Record modifications to master data and transactions.
- User Activity Reports: Monitor login history, document access, and actions.
- Compliance Audits: Support for internal and external audit requirements.

Regulatory Compliance Support - Helps businesses meet local and international regulatory requirements.

Features:

- Tax Compliance: VAT, GST, and other tax configurations and reporting.
- Electronic Filing: Support for e-invoicing and digital tax submissions in some regions.
- GDPR and Data Privacy: Tools to manage personal data and consent.
- Industry-Specific Standards: Support for compliance in sectors like manufacturing, retail, and healthcare.

Document Control and Versioning - Ensures integrity and traceability of business documents.

Features:

- Document History: Track revisions and approvals.
- Access Restrictions: Limit visibility and editing rights.
- Retention Policies: Define how long documents are stored and when they are archived or deleted.

System Monitoring and Alerts - Enables proactive monitoring of system health and security events.

Features:

- Real-Time Alerts: Notifications for suspicious activity or policy violations.
- System Logs: Track performance, errors, and access attempts.
- Integration with Monitoring Tools: Connect to external security platforms if needed.

Integration Security - Ensures secure data exchange between SAP Business One and external systems.

Features:

- API Authentication: Secure access to integration endpoints.
- Data Validation: Prevent injection and manipulation during data transfers.
- Firewall and Network Controls: Protect against external threats.

Cloud and On-Premise Security - Offers robust security whether deployed in the cloud or on-premise.

Features:

- Cloud Hosting Security: Managed by SAP or partners with enterprise-grade protection.
- On-Premise Controls: Full control over infrastructure and access policies.
- Disaster Recovery: Plans and tools to ensure business continuity.

4. Implementation Methodology

Project Methodology

The Frontline project methodology and delivery framework breaks projects down into 5 phases as shown in the image below. This will all be documented and agreed in the project initiation document (PID) and the detailed project plan that will be finalised during the “Project Initiation Phase”.

Regular project team meetings will be scheduled and chaired by the Project Manager and action/exception-based minutes will be issued to all attendees and stakeholders.

An executive steering group will be convened at the start off the project before the Initiation Phase which will identify key decision makers and project sponsors within The Customer. This group will then meet by exception throughout the project, except where specifically identified in the methodology below.

You will receive regular stage highlight reports, informing you of stage progress, risks, issues, changes, and timelines; the method, audience and intervals will be agreed during the initial meeting.

Project Initiation Phase

In this phase a full hand over from the Frontline Sales team to the Project team will signal the commencement of the project.

The Project Manager will prepare a project kick off presentation and produce an initial, draft, high-level project plan.

The Project Manager will convene a project kick off meeting with all the key stakeholders from Frontline and the customer. At this meeting the project scope defined in the solution overview document (provided by the Frontline sales team) and initial high-level project plan will be reviewed. The project methodology will be described including project scope and timelines for delivery, project management and control, project objectives & goals as well as key next stages and actions, before proceeding to the Blueprinting Phase of the implementation process. All phases of the project will be managed via stage boundary and control process. Each phase of the project requires customer approval and sign off before proceeding to the next phase of the project. Following the project kick off meeting the Project Manager will create a project initiation document for customer review and approval. Any future amendments will be handled via change control process. The approval of the project initiation document & the high-level project plan signals the start of the Blueprinting phase of the project.

Blueprinting Phase

In this phase, the lead SAPB1 consultant will convene several detailed requirements gathering workshops with key operational and technical representation from the customer. During these detailed requirements gathering workshops the agreed design of the SAPB1 solution will be reviewed and analysed by key stakeholders to ensure that it meets the business needs of the customer.

The customer will be advised to hold internal business process and requirements gathering meetings prior to the workshops with Frontline with an aim to make the most productive use of the time with Frontline during the Blueprint phase of the project. Frontline recommend customers prepare business process maps for their current business processes in readiness for the Blueprinting phase of the project.

An updated Project Plan and a Business Blueprint will be formally issued at the end of this phase for approval by the key stakeholders. Any changes or additions to the solution overview document will be documented and a change note issued for approval.

Project Realisation Phase

In this phase the Project Manager will oversee the workload of the Frontline team to implement the agreed project deliverables in line with the Project Plan and the Business Blueprint. Any changes, risks or issues, will be raised and addressed during regular project update meetings and or via a Change Control Note (CCN) if applicable. Any updates that require urgent action or decisions will be handled by exception, and the Project Manager will convene either the customer project team or the steering group. (depending upon the impact of the event).

During this phase, the Project Manager will update the project plan which can be viewed online by the customer to get a real time picture of the project progress via the Smartsheet workspace.

This phase will include the configuration, testing, including quality control testing and user acceptance testing of the configured SAPB1 system as defined in the Business Blueprint. The customer will prepare test data from their current / legacy system, exporting, cleansing and importing into the test SAPB1 company with training and support delivered by Frontline. This will allow Frontline and The Customer to work together to test the data migration process before the cut over in the Deployment Phase and assure all parties that any risks associated with that action have been minimised to the maximum extent.

Frontline will deliver a conference room pilot for the customer, providing access to review and carry out user acceptance testing of the configured SAPB1 solution based on the Business Blueprint. Frontline will provide evidence of testing and quality control process to support the user acceptance testing process to be completed and approved by the customer.

Frontline will deliver a range of pilot training sessions based on a train the trainer approach. The Pilot Training will typically include Introduction to SAP B1, Sales, Purchasing, Finance / Banking & Chart of Accounts, Stock, Service, Analytics and Dashboards, Administrator training. The customer is responsible for providing end user training to end users, creating their own desktop procedures and documentation.

The customer will now commence UAT (User Acceptance testing). Frontlines consultancy and development team will provide UAT support during the UAT process.

Once all parties are happy that the solution is ready for Go-Live, the Project Manager will call a Project Team meeting, evidence of successful implementation and testing will be reviewed, and a Go/No-Go decision will be made at the meeting.

If concerns are raised that leads to a No-Go decision, the Project Manager will assume responsibility for rectifying any issues and re-issue updated evidence of successful resolution. A further Go/No-Go meeting will be called and assuming all key stakeholders agree the project will move to the Go-Live phase.

Deployment Phase

Upon receipt of approval to proceed to the Deployment phase the SAPB1 lead consultant will Create Live database in preparation for Go-Live. The Live system is configured the same as the signed off pilot configuration tested and approved during UAT. The customer will migrate and import their live data from their legacy system with support provided by Frontline including business partner, item master, transactional and financial data requirements.

The customer will role out end user training to their end users.

Following approval to Go, the Project Manager will arrange timing of downtime and transition to the new platform for the Client.

Once the cut-over is successfully completed, a formal Go-Live notification will be issued, and the Frontline Support Services will commence.

The Project Team will retain operational responsibility for the first two weeks (the “adopt and support” period), assuming no post go-live issues arise.

At the end of this period, the Project Manager will confirm readiness to close the Go-Live phase. A Steering Group meeting will be convened to ratify this and transition the project to the Support Phase.

Adopt & Support Phase

Once the Client confirms that Go-Live objectives have been met, the Project Manager and team will review any outstanding actions or issues and agree on resolution plans and timelines.

Operational responsibility will transition to the Frontline Managed Service team for onboarding and continued Support from this point, the Frontline Service Delivery Manager will function as the primary contact for the client.

A formal Project Close meeting will be held to review the engagement and document lessons learned for future collaboration.

Project Documents

During the project, the Project Manager will be responsible for the creation, updating and (where applicable issuing) of the following Project Controls: -

- Project Initiation Plan (PID) (For Discovery and Delivery Phases)
- Blueprint Requirements Document
- Statement of Works (SoW)
- Project plan
- Meeting minutes
- Project/Steering Group reports
- RAID log update
    - User Acceptance Testing (UAT) Log
    - End User Sign-off (EUSO)
- Change Control Notes and Change register

All documents will be available to the customer in an online repository, allowing easy access to information and up-to-date status of any aspect of the project during the implementation.

Risk Management

Any risks identified in the project will be detailed in the RAID log and the Project Manager will proactively review and update these as and when any changes occur.

Frontline use a standard risk matrix (below) to score risks.

Risk appetite will be discussed during the kick-off meeting to determine client tolerances and when and if any escalation is required to the Customer team.

			IMPACT				
	RISK MATRIX		1 Insignificant	2 Minor	3 Moderate	4 Major	5 Catastrophic
PROBABILITY	1	Rare	1	2	3	4	5
	2	Unlikely	2	4	6	8	10
	3	Possible	3	6	9	12	15
	4	Likely	4	8	12	16	20
	5	Almost Certain	5	10	15	20	25

KEY
Very Low
Low
Significant
High

Change Management

Frontline operates a detailed Change Management process. During all phases of the project the scope will be carefully monitored by the Project Manager.

The Customer will nominate a representative to work with the Project Manager to ensure that the project delivers the required outcomes and review any proposed changes that have been highlighted.

The Project Manager will issue a Change Control Note (an example of which is included below) to this representative, this will detail the proposed change, the justification for the proposal, any impact on budget, deliverables, or timescales and where applicable any alternative options to minimise the change impact.

No changes to the deliverable scope or budget will be made without express written approval from the nominated customer Project Manager. Change control documentation will be maintained in an online repository and log of all changes proposed with details of its acceptance or rejection.

Frontline Consultancy & Business Services Ltd

Project Change Control Note

Prepared by: Dympna Wilson
Saved date: 5th May 2017
Distribution: Frontline Internal & [Customer]

CHANGE REQUEST			
Reference	PXXXX CCN01	Version	1.0
By		Request Date	
Project Code		Project Name	

DESCRIPTION OF CHANGE REQUIRED	
Other document to refer to	

DESCRIPTION OF MAIN IMPACT AREAS

DESCRIPTION OF BUSINESS BENEFIT	
Other document to refer to	

ESTIMATE
Note: Please use the estimating spreadsheet and think about the following: *Analysis* *Specification* *Development* *Testing* *Implementation* *Training* *Documentation* *Support* £

PLAN MODIFICATIONS / IMPACT TO TIMESCALES
If there is an impact on timescales Project Managers please complete relevant sections on Page 2 prior to sending to Sales / Account Management

RESOURCES ALLOCATION & RESPONSIBILITIES

CUSTOMER AUTHORISATION					
Accept / Decline / Defer		By		Date	
Priority (High / Medium / Low)		Purchase Order			
Comments					

5. Service Levels

Frontline's standard hours of service are 8am – 6pm Monday to Friday, excluding UK bank holidays. This coverage can be extended to a full 24x7x365 operations support services should this be required.

Frontline's service desk processes are underpinned by ITIL v4 methodology. Incident and problem management processes are fully designed and followed where required. Inbound calls are categorised against the contract and are dynamically allocated to support personnel. All access to managed infrastructure is recorded and monitored with anti-tamper technology that allows for RBAC and MoLP to be applied.

Service Component	Details
Implementation Timeline	6–52+ weeks (depending on scope)
Support Availability	Monday–Friday, 8am–6pm GMT

Additional Support Hours	24x7x365 by contractual agreement
Service Level Agreements	Please see details below
Additional Training (remote or on-site options available)	Can be requested for quote against professional services.
Support for Partner ISV Solutions	Initial SLA as above, then ISV specific SLA
Support for non-partner ISV Solutions	Support is direct with ISV

Frontline Customer Portal

Access to the Frontline customer portal provides a fast and straightforward way for you to open and track any tickets for any of our service catalogue services. This means less service desk calls, and better overall quality of service for all Frontline customers.

The Frontline Client Portal is available 24/7 and allows support requests to be raised. The portal has the following features:

- View all tickets.
- View predefined dashboards.
- View customer specific knowledge base articles with known fixes to certain incidents, requests, and problems. (As they have arisen).

Primary contacts on the customer account can also view:

- All documentation
- The service definition documents (SDDs) where they exist.
- Welcome pack
- Quotes and contracts

Service desk services for tracking and follow-up on incidents / problems with technical teams

Our dedicated service desk tools ensure that tickets are monitored for age and updates. These are managed by the engineers but also by the team leader and service desk manager to ensure that updates are sent on a regular basis throughout the lifecycle of an incident.

Ticket Priority Matrix

Ticket Priority is determined during the initial engagement. The detail provided by the Customer helps us to estimate the urgency and impact of the issue.

Targeted response time and targeted resolution time are determined by the assigned priority categorisation and linked to the specific services agreement purchased by a customer.

The priority level may be revised due to the nature and impact of the issue as the investigation progresses.

The table below shows the priority descriptions attributed to each priority level:

Priority	Impact	Description
1	Critical	An Incident that has impacted an entire site or service and has stopped all Users and/or Customers from using critical IT functionality where no workaround exists. Excluding individual home worker sites.
2	High	An Incident that has stopped the business from using non-critical functionality due to it being unavailable or degraded.
3	Medium	An incident which affects the customer’s service but has a small impact to the business and high priority Service Requests.
4	Low	Service Requests, or enquiries for information purposes only.
5	Planning/Change	Change Tickets

Frontline IT Consultancy

Target Service Levels

All P1 incidents are alerted to the team leader and service desk manager for immediate escalation and resourcing. Service desk performance will be measured and reported in monthly service reports and regular service meetings.

Service Level	Target Response	Target Resolution	Standard Support Hours
Priority 1	1 hours	4 hours	Monday to Friday - 8:00am to 6pm*
Priority 2	2 hours	8 hours	Monday to Friday - 8:00am to 6pm*
Priority 3	4 hours	16 hours	Monday to Friday - 8:00am to 6pm*
Priority 4	8 hours	32 hours	Monday to Friday - 8:00am to 6pm*

* Excluding UK Bank Holidays

Service Delivery Manager (SDM)

Clients can select Managed Service Delivery as a Service option, this includes the allocation of a Frontline service delivery manager (SDM) to oversee the delivery of an efficient, high-quality service. The SDM will be available as a single direct point of contact for all service-related issues and queries and will be responsible for the provision of the following: -

- Monitor the service level to ensure adherence to agreed SLA's and KPI's
- Provide a monthly service report of all the agreed contractual measurements by the close of the 5th working day. This will include service and performance measurements, proactive capacity reporting and recommendations, service desk ticket performance, security incidents (including any advisories and recommendations).
- Root cause analysis reporting, corrective measures, and recommendations.
- Management of diarised activities such as service meetings, change requests and planned maintenance windows, change advisory board.
- Creation and maintenance of an ongoing service improvement plan, risk register, design documents, change logs and key personnel and authority lists.
- Quarterly test reports for backups / restore processes
- Liaison between the client, Frontline and any other 3rd party support vendors.
- Maintenance and management of the baseline BCP plan, co-ordination and management of agreed tests, test reports and recommendations if the Managed Disaster Recovery Service.

6. Roles and Responsibilities

Frontline Consultancy

- Project management and delivery
- Solution Consultancy
- Technical configuration and customisation
- Training and documentation
- Ongoing support and system health checks

Client Organisation

- Provide access to key stakeholders.
- Participate in workshops and UAT.
- Assign internal champions for adoption.
- Maintain internal change management.

7. Pricing Model

- Pricing is based on:
- Scope of modules implemented
- Number of users and entities
- Customisation and integration complexity
- Independent Solution Vendors (ISV)
- Note: Fixed-price packages and phased rollout options are available.

8. Benefits

- Unified business operations
- Real-time insights and reporting
- Scalable cloud infrastructure
- Reduced manual processes and errors.
- Enhanced compliance and data security

9. Contact Information

- Frontline Consultancy and Business Services
- Website: https://www.frontline-consultancy.com/sap-business-one-services/
- Email: info@frontline-consultancy.com
- Phone: +44 (0)333 323 2141

Frontline
IT Consultancy