

PRIVATE AND CONFIDENTIAL



RSM NetSuite

G-Cloud 15 Service Definition



Contents

Introduction	3
NetSuite Services	5
Business requirements	14
Project approach	21
Commercial overview	28
Service levels	34
Business continuity	38

01



Introduction

RSM and NetSuite

About us

NetSuite

NetSuite, acquired by Oracle in 2016 for \$9.3Bn, is the industry's leading provider of cloud-based Enterprise Resource Planning (ERP) and Omni-channel commerce software suites.

NetSuite offers a broad suite of applications, including Financial

Management, Customer

Relationship Management (CRM), Ecommerce and Retail management, Professional Services Automation (PSA) and Human Capital Management (HCM) that enable companies to manage most of their core business operations in one single unified suite.

NetSuite software allows businesses to automate operations, streamline processes and access real-time business information anytime, anywhere.

NetSuite is the world-leading software as a service single business platform and is used by over 40,000 companies across 160 countries, including household names such as Deliveroo, Groupon, Proctor & Gamble, HP, Johnson & Johnson, Spotify, Baylis & Harding, GoPro and the State of Texas.

RSM

RSM partners with organisations to achieve properly configured business systems that meet business needs in a practical, timely and cost-effective manner.

RSM extends the offer of partnership to provide system optimisation, operational support and extended functionality for the lifetime of the ownership of the solution.

RSM is designed to operate as a consulting and solution led practice and architects solutions for clients based on the NetSuite platform. The values of the company are based on openness, honesty, a strong work ethic and excellent team spirit.

Those values have seen the business achieve the following goals:

- Over 250 successful deployments of NetSuite
- 5x Recipients of NetSuite's 5 Star Partner Award
- 250+ years of NetSuite experience
- 30%+ year on year growth
- 13x NetSuite Partner of the Year
- ISO 9001 & ISO 27001 Certified

02



NetSuite Services

RSM's NetSuite services



Evaluation and Design

For those on the road to a NetSuite implementation

- Negotiate competitive licences with Oracle.
- Full project lifecycle services.
- Project management.
- Tailored implementations.
- Customised solutions including workflow, integrations and scripting.



Configuration

For those looking to improve functionality of their current system with additional functionality and looking to improve things further, such as:

- Revenue recognition.
- Multi-books.
- EFT payments.
- Integrations.
- Workflow/ Scripting.
- Install/ configure new features.
- Core assessment plus flexible add-ons to suit your needs.



Integration

RSM has extensive experience in integrating systems.

The integration team within our NetSuite practice has integrated NetSuite with a wide range of business systems and applications to meet a wide-range of requirements, utilising different integration methodologies including iPaaS and point-to-point.



Training

RSM delivers comprehensive NetSuite training across all core modules, tailored to your own system. We offer expert-led courses, flexible delivery (Crewe, onsite or remote) and easy-to-follow materials. Equip your teams with the skills to optimise financials, operations, reporting, data, assets, inventory and customer processes for maximum system value..



Support

Our dedicated support desk will help you maintain NetSuite and its benefits after go live. You can focus on running your business while we take care of the platform.

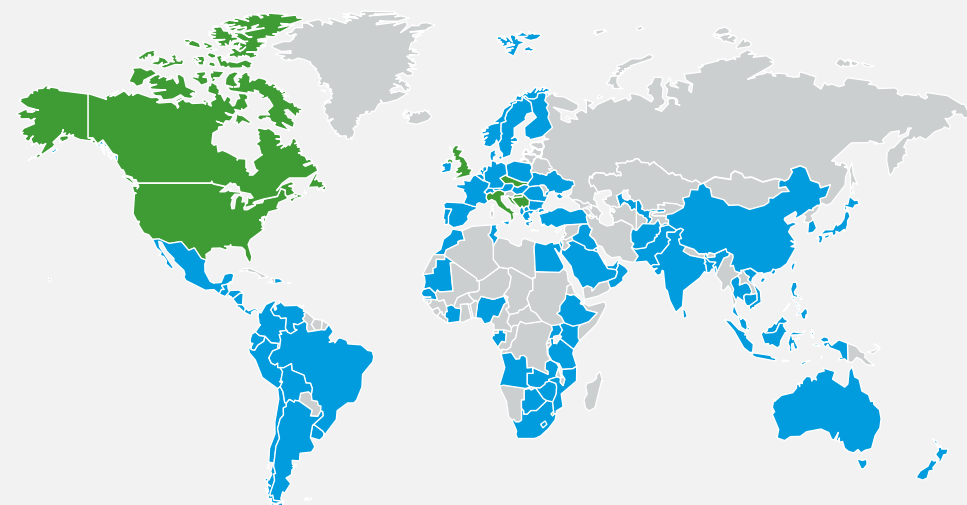
An award-winning global NetSuite practice

RSM is the leading provider of NetSuite implementation services, products and solutions globally.

Our multi award-winning NetSuite team has developed a robust approach to delivering and advising on NetSuite implementations, covering all aspects of project management, process design, configuration, customisation, integration, data migration and reporting.

We bring the combined skills required to define and deliver successful ERP implementations and adoption, with practical, hands-on experience of delivering tangible, sustainable improvements to your business.

- Successfully delivered over 250 implementations throughout UK, Europe and globally
- Over 450 people globally dedicated to providing NetSuite services
- Certified NetSuite practitioners at all levels with up-to-date knowledge including SuiteSuccess, SuiteProjects, SuitePeople and Revenue Management.
- Strong global partnership with NetSuite, including 11x recipients of the NetSuite Solution Provider Partner of the Year award
- Business led approach focuses on your organisational goals and delivering the outcomes expected
- Broad delivery capability alongside NetSuite skills providing programme leadership, change management, integration, data architecture and process design.



Key: ■ RSM presence

■ RSM International territories



NetSuite optimisation service

Unlock the Full Potential of NetSuite

RSM's NetSuite Optimisation Service usually starts with a rapid and bespoke in-depth review of your pain points and NetSuite system.

Our objective is to develop a comprehensive understanding of your system and process inefficiencies, identify solutions to address them, and to provide a clear, actionable roadmap to help you achieve a fully optimised solution delivering maximum value to your business.

We carefully tailor our Optimisation Services based upon your situation and needs. After supplying the actionable outputs of your Optimisation review, we can then help you deliver the improvements identified to achieve your desired end-state.

Whether you're seeking to enhance system efficiencies and improve adoption, curious about new functionalities, or even experiencing mid-implementation challenges, our unique approach ensures your NetSuite system supports your current and future business goals.

Our Approach

We follow a structured yet flexible methodology, typically delivered in two to four phases, tailored to your circumstances – focussed on delivering maximum value and transparency.

Our expert NetSuite team help you evaluate your system issues and develop an actionable plan to optimise your system to get it to its optimum state.

Discovery - Initiate discovery to identify, log and understand your business objectives.

Analyse - Evaluate current system and process issues, evaluate improvement opportunities, assess effort, cost & timelines.

Solution - Deliver a detailed Issues and Solutions log, with a prioritised road map including quick wins, project size, effort and costings.

Optimise - Implement

Key Benefits



Expert guidance



Roadmap/ priority planning



Rapid value delivery



Tailored solutions

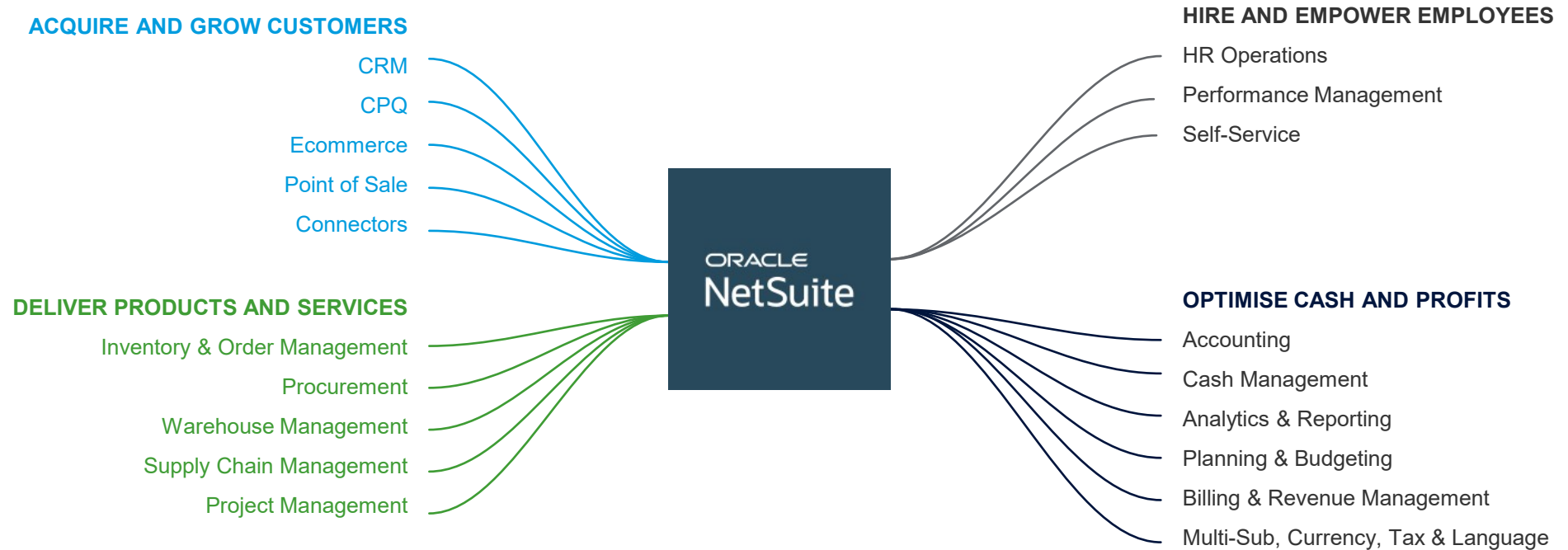


Improved system adoption

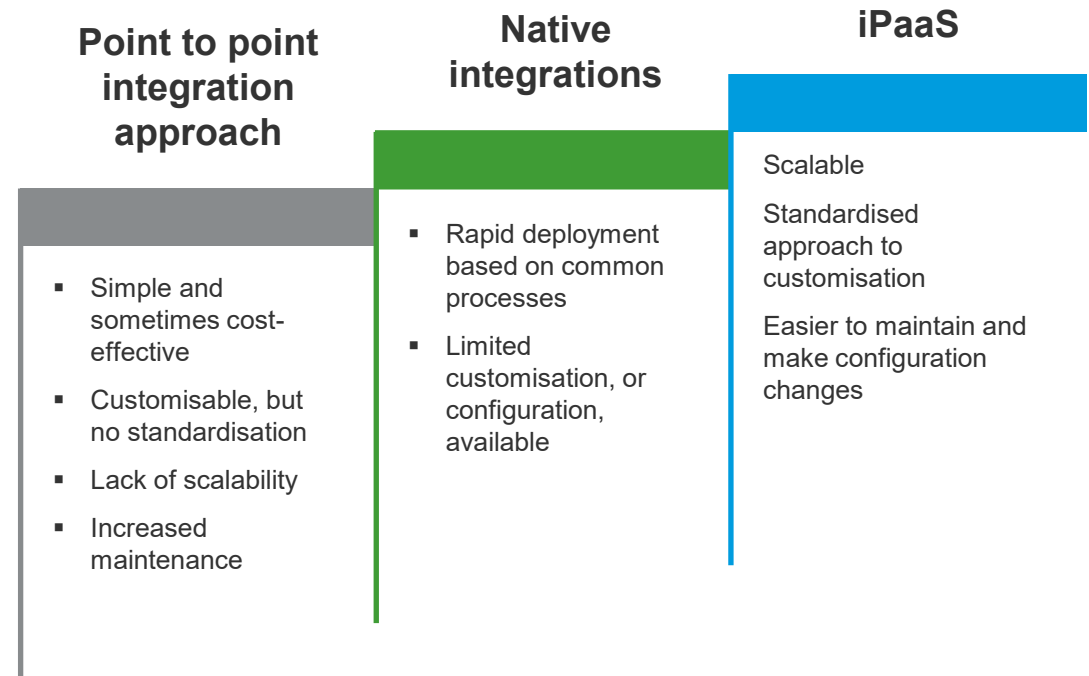


Optimised system & processes

NetSuite configuration



Integration strategies



Training

RSM provides comprehensive NetSuite training designed to build practical, real-world skills across all key business processes. Courses are delivered in your own NetSuite environment and can be held in our Crewe training suite, onsite at your office, or remotely

The following client specific options are available:

- Standard one-to-many classroom or office-based courses for essential training, ideal for groups/departments, or for administrators and also for advanced reporting.
- One-to-one master classes with a focus on specific functional areas, or for train-the-trainer delivery.
- One-to-one (or one-to-many) basic user training
- Bespoke: tailored to meet a specific need.
- Remote: 1 to 2 hour slots delivered via online meeting or pre-recorded modules.
- Different courses are more relevant at different stages of the project.

Some standard training courses are also offered as public classroom based sessions covering:

- Administrator Training (3-day course)
- Financials Training (1-day course)
- Performance Reporting Training (2-day course, sometimes supplemented by a workshop on the 3rd day for clients to apply what they have learned to their own use-cases under the guidance of the trainer)

Administrator Training

- NetSuite security, setup & configuration
- Employees, roles & permissions
- Classification
- CRM & Activity Management
- Advanced Customisation
- Data conversion & Management
- Reports & saved search overview

Financials training

- Access & Records
- Accounting Setup & Configuration
- Basic Item Management
- Sales & Accounts Receivable
- Accounting Transactions & Preferences
- Bank Account / Statement Reconciliation
- Accounting Periods
- Electronic Bank Payments

- Key Reports (Including Making Tax Digital)

Saved search and reporting training

- Billing Schedules
- Amortisation Schedules
- Allocations
- Intercompany Trading Setup
- Intercompany Transactions & Reporting

Saved search and reporting training

- Uses & Advantages of Saved Searches
- Creating Saved Searches
- Publishing Saved Searches
- Adding In-Depth Analysis
- Advanced Formatting
- Advanced Calculations

Our support offering

Selecting the right solution for your business needs.

13 YEARS
OF OPERATION

Longevity and proven track record

100%
NETSUITE ONLY

Our practice is dedicated to the NetSuite product

300+
IMPLEMENTATIONS

In a variety of business verticals and sectors

#1

Most decorated NetSuite partner

BASIC

Designed for clients with low operational demands or those using the service as a contingency solution.

- Incident Management
- Advice and Guidance

PREMIUM

Suited for clients with intensive needs or those operating without an existing support structure.

- Incident Management
- Request Management
- Advice and Guidance
- Administration Services

AMS

Designed for enterprise-level clients seeking comprehensive system administration, real-time monitoring, and long-term planning.

- Incident Management
- Request Management
- Advice and Guidance
- Administration services
- Proactive Upgrade Testing
- Proactive Error Reporting
- Roadmap Planning

Our support offering

Selecting the right solution for your business needs

FEATURE	BASIC	PREMIUM	AMS
Incident Management (Break/Fix)	✓	✓	✓
Request Management (RFS)	✗	✓	✓
Support Hours (Mon – Fri)	Business Support 9am – 5pm	Business Support 8am – 6pm*	Business Support 8am – 6pm*
Web Portal Access (24/7)	✓	✓	✓
Case Submission	Customer Centre Only	+ Telephone & Email	+ Telephone & Email
Authorised Contacts	Up to 2 Authorised Contacts	Up to 4 Authorised Contacts**	Up to 4 Authorised Contacts**
Access NetSuite Professionals	✓	✓	✓
Assistance, Advice and Guidance	✓	✓	✓
Administration Services	T&M	✓	✓
Product assistance as defined	✗	✓	✓
Release Preview assistance	✗	✓	✓
Proactive Release Preview Testing	T&M	T&M	✓
Proactive Error Reporting	✗	✗	✓
Roadmap Planning	✗	✗	✓

* Extended hours are available upon request

** Additional authorised contacts are available upon request

Business requirements

Platforms and features

Unlock your organisation's potential with NetSuite

The one solution that will simplify and streamline your core processes. The only cloud-based enterprise resource planning platform you'll ever need.

Platform overview

Organisations today require solutions that are intelligent and flexible enough for their changing business needs. NetSuite is that solution. There's a reason it's the world's most deployed cloud-based Enterprise Resource Planning (ERP) solution, used by more than 40,000 organisations in over 160 countries.

Access a unified view of your business operations

NetSuite brings your key processes and operations into one central location. By combining financials, CRM, ERP and eCommerce, you can access one unified view, one source of truth. This allows you to grow your business more efficiently and make smarter decisions.

Become more agile

Forward-thinking companies need to remain agile. New processes and ways of working can be better implemented through NetSuite ERP. Being cloud-based, software updates are automatic and information is always current, helping your business to remain flexible and informed.

Gain more visibility

NetSuite's user interface lets your team combine data with visual analytics to generate meaningful and actionable business insights. Users can see whatever they need to, when they need to in order to make faster business decisions.

Accessible anywhere, anytime

NetSuite requires no specific hardware or infrastructure and is accessible anywhere, anytime with an internet connection using a mobile application or standard web browser.

Automatic upgrades, minimal downtime

On-premise servers require specific technical expertise to manage and maintain them. Version upgrades can also be expensive and disrupt your business due to downtime. With NetSuite, your system is automatically upgraded twice a year at no extra cost.

Security

NetSuite is the world's largest cloud ERP vendor, trusted by more than 40,000 customers worldwide. Strong encryption, two-factor authentication and detailed audit trails, together with role-based and application-only access, provide best in class security for your peace of mind.

Boost efficiency and productivity

The automation of key processes within daily operations, such as order management, billing, warehouse and fulfilment, as well as access to one unified view of your business can boost your efficiency and productivity.

Cut your it-related costs

NetSuite operates via the cloud which means you no longer need to rely on expensive on-premise servers and constant maintenance fees. There are no on-site IT costs and overheads associated with managing the system can be kept low.

NetSuite Enterprise Resource Planning (ERP)

Used by over 40,000 organisations across 160+ countries, the NetSuite ERP system offers a modern, scalable solution. By providing a single, integrated system capable of handling key business processes such as accounting, inventory, supply chain and order management, NetSuite ERP can improve the efficiency and productivity of your operations and empower businesses of all sizes to innovate and grow.

With built-in business intelligence and analytics, your organisation will finally have a single source of truth to help make better, faster decisions.

Functionality availability:

- Multi-company, location and currency
- CRM
- Projects
- Inventory Management
- Demand Planning
- Procurement
- Fixed Assets

(Actual functionality is determined by the selected license)

Functional overview

NetSuite OneWorld

NetSuite OneWorld provides the agility, automation and capabilities to enable businesses to move beyond just thinking global to executing at a global scale by providing country-specific capabilities enabling them to meet local compliance and reporting obligations wherever they do business in the world.

NetSuite OneWorld delivers a real-time, unified global business management solution for enterprises that manage multinational and multi-subsidiary operations.

Fixed assets

Functionality to help acquire, depreciate, dispose and revalue assets, depreciation management, asset process accounting automation, real-time asset reporting.

Demand Planning

Advanced inventory control features including: demand plan creation - leveraging historical data or sales forecasts; calculation of supply plans and automatic generation of purchase or work orders; modelling of future inventory levels based on expected sales and purchase orders.

Professional Services Automation (projects)

Manage the complete Bid-to-Bill process of your services business with NetSuite's leading Professional Services Automation solutions.

Designed from the ground up to serve the needs of your growing services delivery business, our solutions are easy to implement, and simple to maintain. And as your processes change, NetSuite's powerful configurability and expanded capabilities in project management, resource management, project financials, billing and invoicing, available when you need them.

- Project Management
- Resource Management
- Project Accounting
- Billing
- Timesheet management
- Expense Management
- Analytics

Advanced procurement

Purchasing automation including: simplified data-entry for purchase requisitions, approval routing, item consolidations from multiple requisitions into a single purchase order, purchase contracts and blanket POs.

Inventory management

Additional functionality for stock control including: bin numbering, automatic calculation of lead times and demand, bar coding, item labelling, matrix items and multiple units of measure.

NetSuite CRM

NetSuite CRM+ software is the only cloud solution that delivers a real-time 360- degree view of the customer. NetSuite CRM provides a seamless flow of information across the entire customer lifecycle from lead through to opportunity, sales order, fulfilment, renewal, upsell, cross-sell, and support.

In addition to offering traditional CRM capabilities such as SFA, customer service management and marketing automation, NetSuite CRM delivers quotes, order management, commissions, sales forecasting and integrated ecommerce capabilities.

Customisations

Where standard functionality doesn't meet your needs, RSM can provide customisations in line with the client's requirements ensuring compatibility with standard features and the NetSuite platform.

This list includes (but is not exhaustive):

- Custom fields, lists, record sets and forms
- Custom workflows
- Mail and printed templates
- Custom interfaces and integrations

All associated customisation is designed to be fully compatible with the NetSuite platform, utilising standard features where possible, and will be supported through an appropriate support and maintenance package.

SuiteApps

Designed as a platform, there is a growing “SuiteApp” community which works in the same way as Apple iPad and iPhone apps, by plugging into the application to provide instant functionality for the user.

Example enhanced functionality available through RSM SuiteApps:

- Absence Management
- Carrier Management Integrations
- Credit Checking Integrations
- Mobile Applications
- Enhanced Employee Expenses

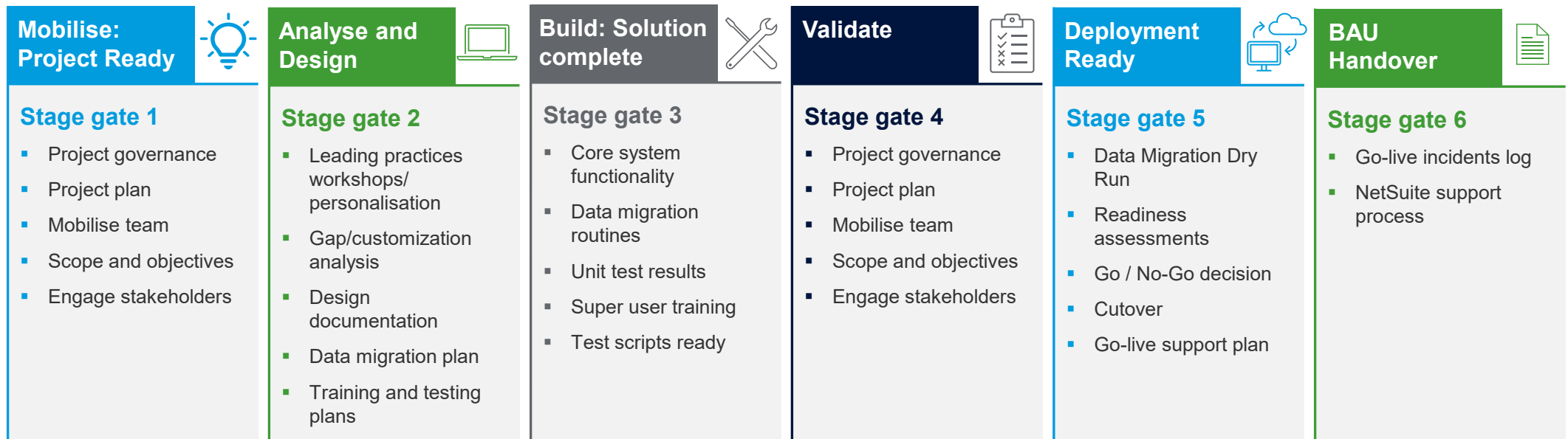


Project approach

Selection, design and deployment

Our Netsuite implementation methodology

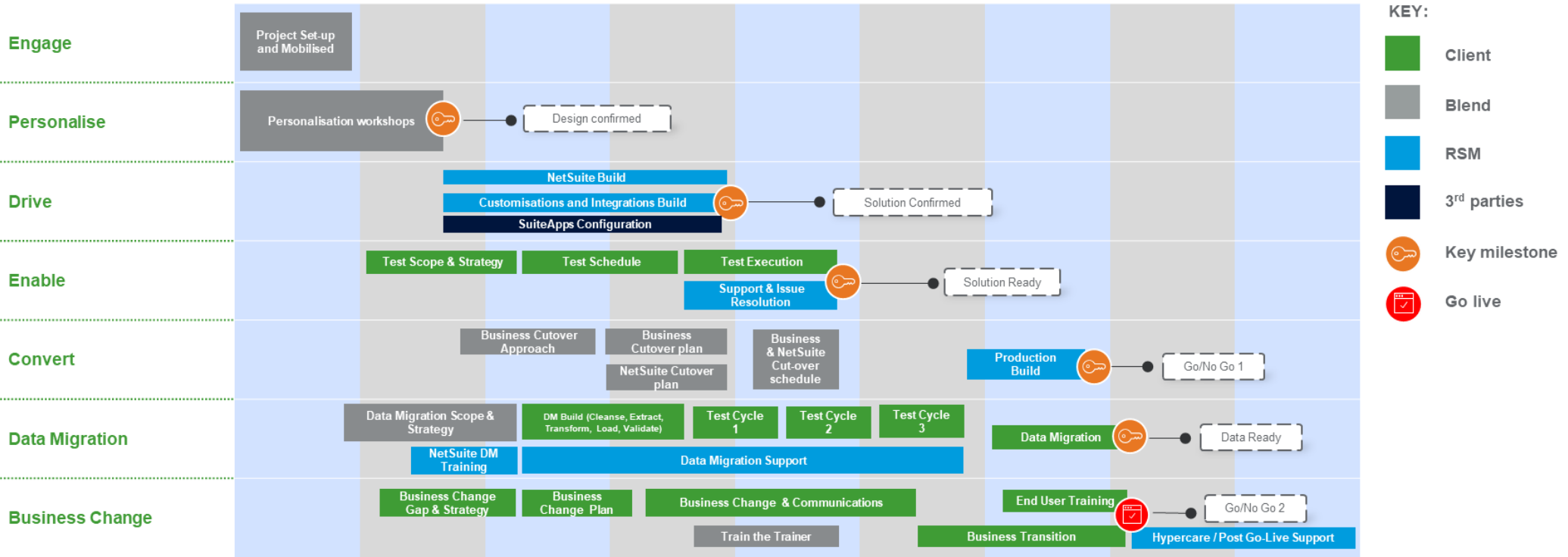
Our methodology combines industry best practices with a phased implementation approach, commencing with a Design phase, before moving to the Build and Deploy phase.



Indicative project plan

The plan below sets out an indicative time frame for implementation based on our experience of similar projects.

RSM will work alongside the client to agree a timeline for the project. Our plan assumes that commercials are completed prior to the project initiation, and that your resources will be made available for the activities marked below including personalisation workshops, data migration, testing and training. Projects of this nature typically complete within 6-9 months.

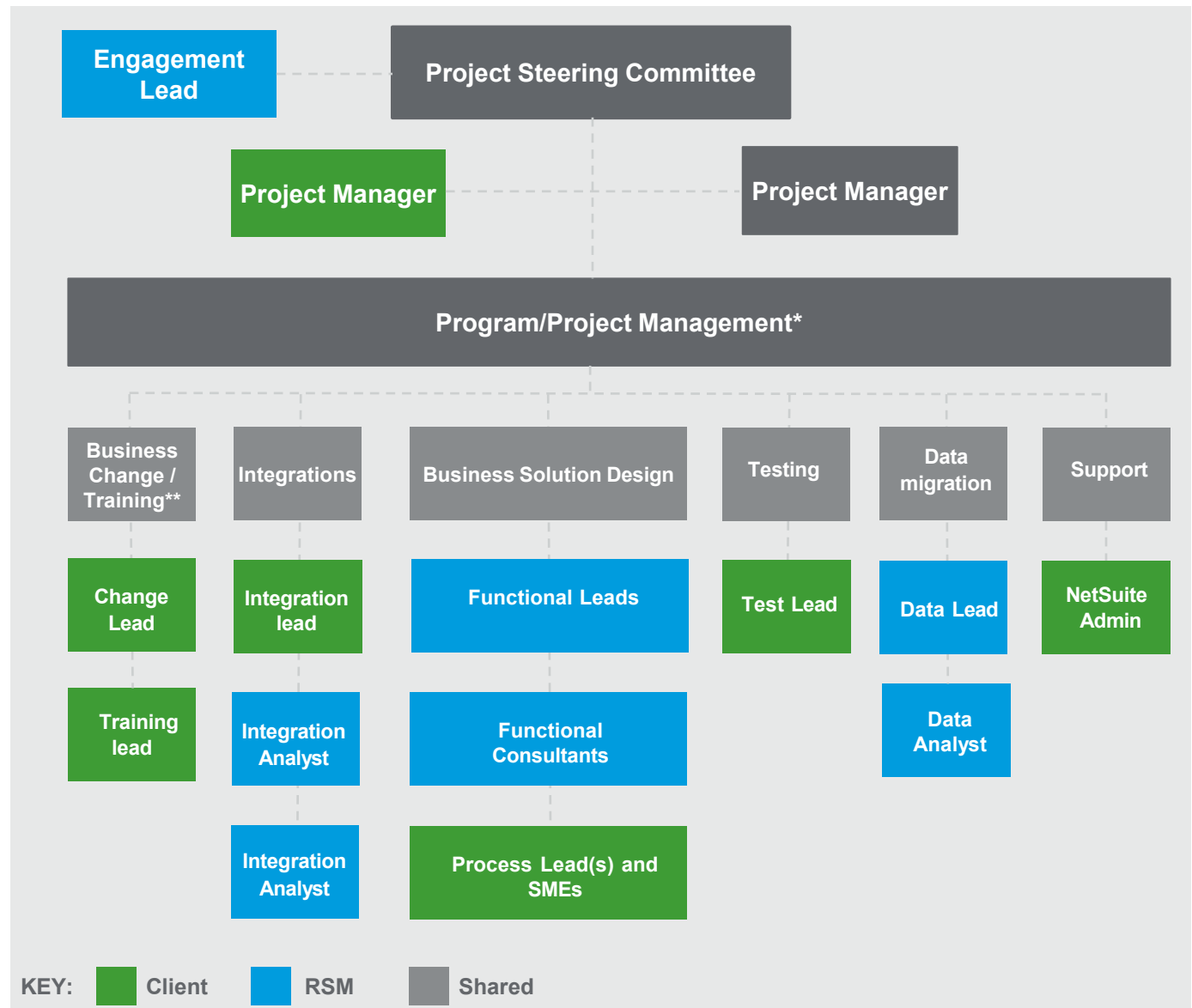


Our proposed delivery structure

We plan to manage this project collaboratively with you. Our approach assumes that you will provide the following resources:

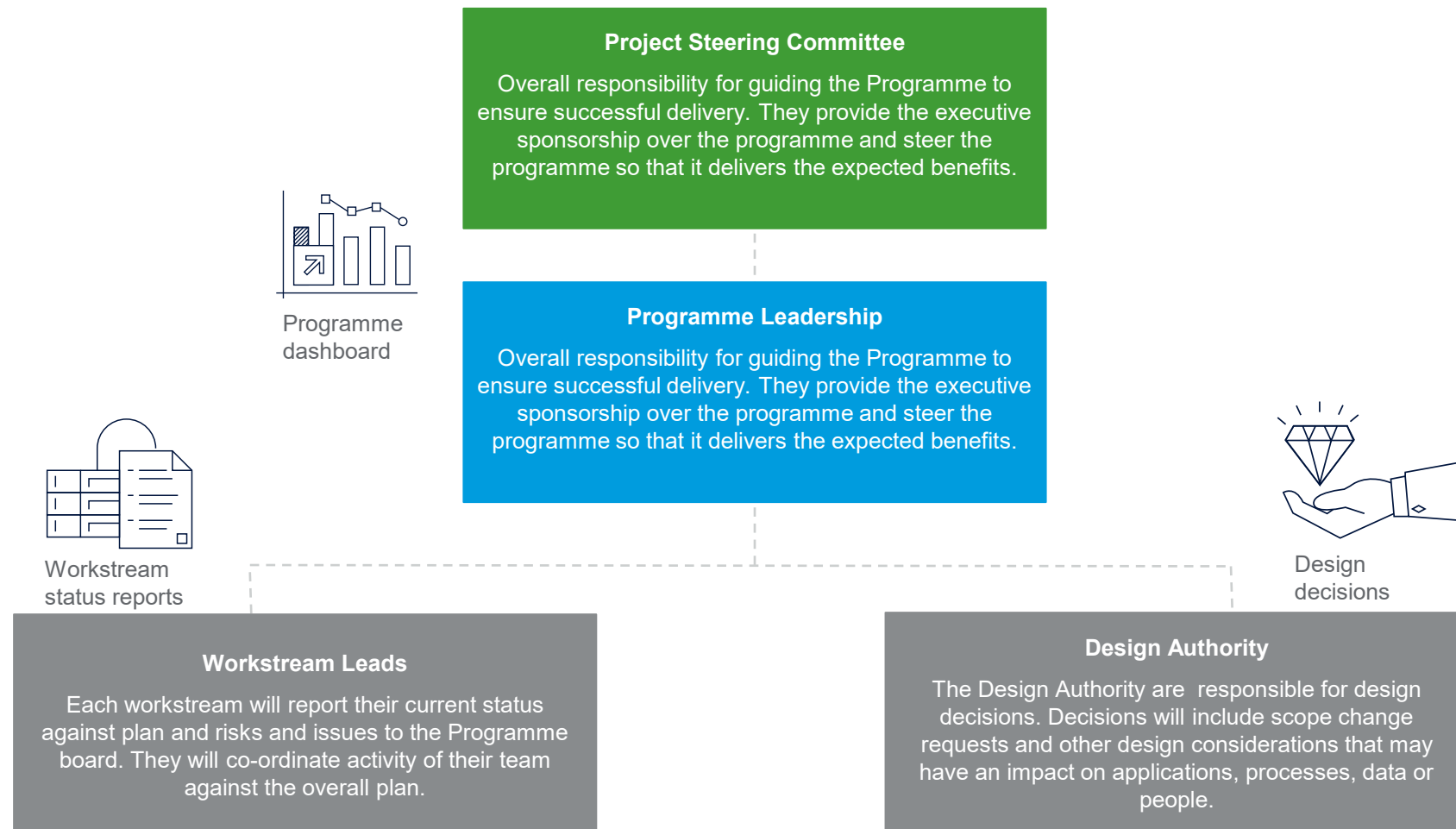
- The **Project Manager** will work with the RSM Project Manager to maintain the project plan and schedule your resources. They will manage and escalate those risks and issues that require resolution internally.
- The **Change Lead** will prepare, coordinate and deliver all business change and training required activities, working closely with RSM.
- The **Integration Lead** will coordinate the design, build and deployment of the application interfaces, data flows and APIs.
- The **Process Lead(s) and SMEs** will participate in process workshops, bringing knowledge of the business requirements. They will participate in testing the system during the validate phase and help to resolve issues. They will support the cut over and go live process during the stabilisation phase.
- The **Test Lead** will work closely with RSM to prepare, plan and manage the formal test phase of the implementation.
- The **Data Lead** will work with the RSM data analyst to extract data from the legacy systems and import into NetSuite. They will create validation processes to reconcile the imported data.
- The **NetSuite Administrator** will work alongside RSM staff throughout the project lifecycle, to benefit from system and project knowledge transfer and skills to maintain the solution post go live.

Note: These are roles and not FTEs. One person may be assigned more than one role



Programme governance

On a project of this scale, it is essential to have a simple but robust programme governance structure with clearly defined roles and responsibilities at each level. The governance structure works through a regular cadence of reporting and meetings.



Ensuring success

RSM has extensive experience of implementing NetSuite for organisations like yours. On this page we have set out the key learning points from this experience to ensure a successful deployment.

Embrace change

Do not simply replicate what is being done today – use the project to reimagine how you operate, using NetSuite leading practices to minimise customisation and achieve the best value from your SaaS solution. This may mean changes to your current business practices, and this will require active management.

Working in partnership

Success is built on developing a partnership where a single project team is focused on delivering the desired outcomes through the deployment of talent from both organisations.

Resource

Successful projects are successful by having the right resources engaged at the right time – projects that are expected to deliver fundamental change need resources dedicated to them without unnecessary distractions, allowing individuals to contribute effectively to the team and use their talent to help the project meet its objectives.

Clear objectives and strong governance

It is critical to the success of any programme to have clearly defined objectives and outcomes that are backed up by executive level sponsorship. Project governance and control is fundamental to delivering against those objectives. Good governance needs structure and discipline from day 1 to be effective and support successful delivery within plan, budget, and scope.

Focus on the benefits

Keep the initial scope simple and deliverable, focusing on the areas that deliver the greatest benefits for the first phase. Subsequent optimisations can be delivered to build on the value of your NetSuite investment, expanding your functionality and making use of new released functionality via the twice-yearly upgrades.



Data migration

Data preparation and importing is a key undertaking and often responsible for project delays, so merits its own section in this document.

A legacy Chart of Accounts with the same account numbers and account names can be transitioned into NetSuite, however NetSuite provides additional segmentation e.g. subsidiaries, locations, classes and departments in order to simplify the accounts structure. It is therefore proposed that the client takes advantage of NetSuite's segmentation and reporting capabilities and consider rationalising the chart of Accounts.

RSM will provide guidance throughout this process.

The data import process for entity records such as customers, suppliers and items consists of four stages:

- Import template creation
- Sample data import
- Full data import
- Testing and completion certification.

NetSuite has a built in CSV import wizard, which takes into account the type of record to be created, allows a choice of one or more source CSVs and allows the mapping of CSV columns to specific NetSuite record fields.

NetSuite has an opening balance import sheet, whereby all account balances can be typed in and the "out of balance" amount will be displayed in the top section of the page. If there is an imbalance, NetSuite will post the difference to the opening balance account.

RSM will provide guidance on the level of data migration support required and identify data migration activities that should be undertaken by the client.

05

Commercial overview

Platform and services

Platform

RSM will consult with the client to ensure the most appropriate licenses are included within the formal quotation. The client will then order the licenses directly with Oracle-NetSuite.

In order to agree the formal quotation we will discuss in detail functionality, users and infrastructure. Details below:

Functionality

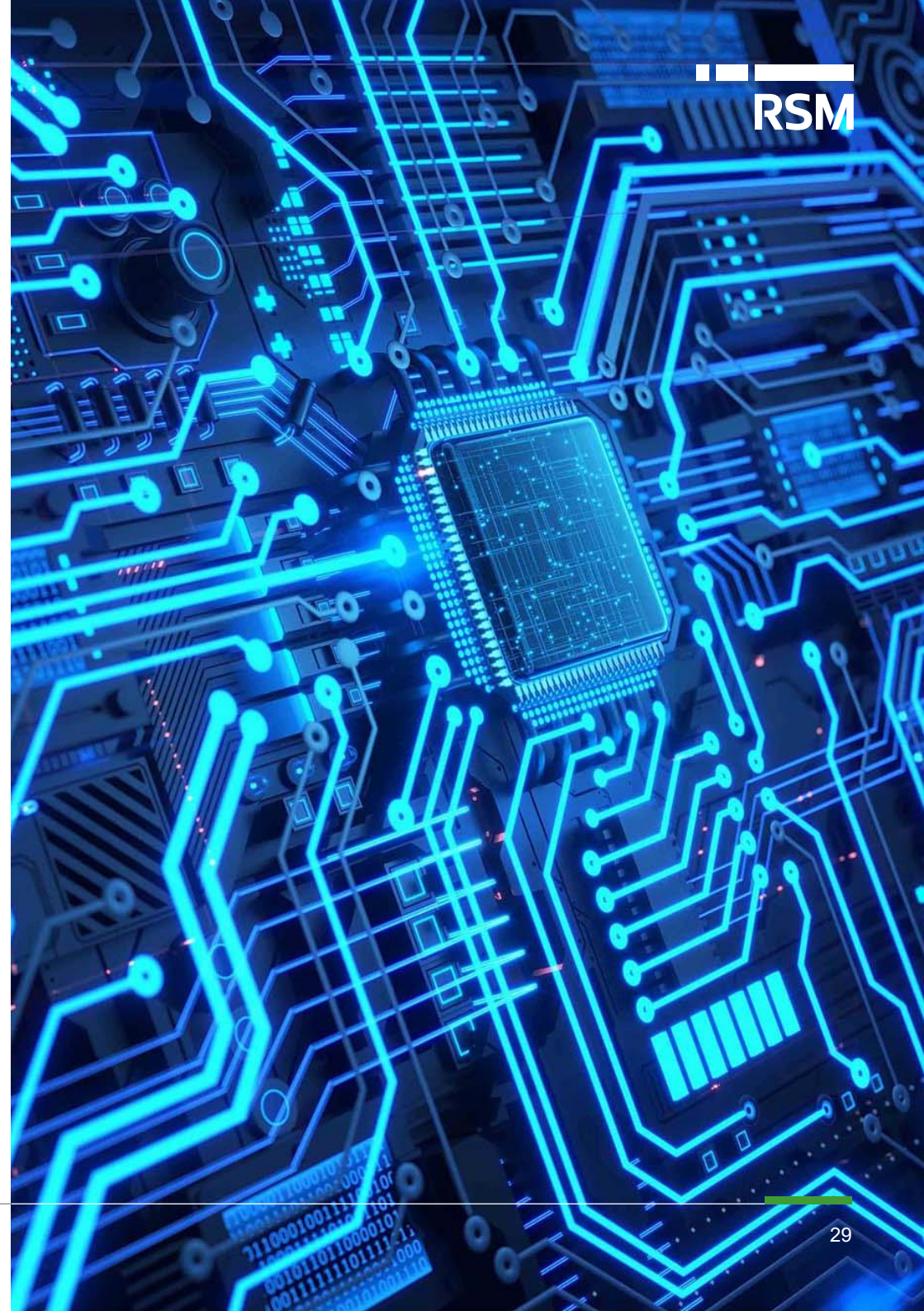
- Base Suite – options determine the level of functionality
- Additional Modules – options provide enhanced functionality to complement the base suite

Users

- Full-access users – subject to role and permissions, these users can be granted as much, or as little, access to the system
- Self-service users – these users can only be granted limited functionality

Infrastructure

- Additional Environments for testing, training and configuration
- Enhanced Service Tiers to increase concurrent processing volume



Professional services

Professional Services fees are structured as follows:

Fixed price (fixed scope) – RSM endeavours to present as much of the professional service requirements on a fixed price, fixed scope basis. RSM has a great deal of experience in deployment of NetSuite standard features and can undertake most of this work on this basis. It may also be possible to provide fixed price, fixed scope options for customisations subject to a clearly defined and agreed specification.

Fixed rate / time and materials (variable scope) – For areas of functionality that cannot be undertaken on a fixed price basis, RSM provides a schedule of rates based on a fixed rate per day, by resource level or activity.

Within a fixed cost project RSM typically include a limited time budget for some activities – a recommendation is made based on experience of similar projects previously completed. These activities are treated as variable components to give the client flexibility throughout the project. Any additional support required on these activities will be undertaken on a fixed rate basis and billed in arrears.

The following page identifies typical activities undertaken under each basis.

Expenses – RSM will request reimbursement for all reasonable expenses for travel, living and accommodation for time spent at client premises. Expenses will be invoiced monthly in arrears. RSM does not charge for travel time when travel is scheduled in accordance with a project programme. For services provided within the M25 there will be no expenses recharged. RSM may request that clients travel to RSM's offices for some project activities. There is a dedicated training centre available.

Most projects utilise a hybrid model depending on the resources available and the scope of the work.

Fixed price, fixed scope elements typically include:

General system configuration	- Initial System and Company Set up. - System configuration to support the client's processes (financial management, reporting, purchasing, stock). Users, Roles/Permissions and Dashboards. - Forms and document templates including customer / supplier facing transactions (e.g. invoices, purchase orders, etc.).
Additional module configuration	Most additional modules only require standard features configuration which would be undertaken on a fixed cost basis.
Customisations & integrations	Subject to a clearly defined, and approved, scope with a supporting specification.
Environment management	- Sandbox Refreshes (data). - Path to Production (migrating functionality between environments). Managing test environments to facilitate testing and training.
Training	- Administrator Training. Financial Training. - User Training specific to business areas. Saved Search & Reporting training.
Data templates	Templates will be provided to the client. The templates are tailored to ensure the specific information relevant to each client can be imported.
Quality assurance and control	Quality Assurance and Control activities are undertaken by a dedicated team to ensure that a client's configuration conforms to our internal standards whilst meeting the requirements of our clients.

Fixed rate elements typically include:

Project management	▪ The level of project management required is typically influenced by the proportion of time committed by the client's internal project manager. ▪ Depending on how critical the timing of milestones are and the progress of the project RSM may recommend, during the project, that project management activity is increased. ▪ Project Management is charged on a fixed rate basis.
Data migration	▪ Standard templates are provided by RSM to the client on a fixed cost basis. Some clients request additional support from RSM although this activity is always owned by the client. ▪ After providing the templates any data migration assistance required will be undertaken on a fixed rate basis determined by resource level.
User acceptance testing	▪ RSM recommend that a level of support is included within the project to work with the client to produce test scripts to support the testing phase. ▪ Some clients opt to have a dedicated resource on site throughout testing to support the activity. This support is undertaken on a fixed rate basis determined by resource level.
Go-live	▪ The amount of go-live support is typically agreed at the start of a project. ▪ RSM recommend a level of go-live support based on the complexity of the system configuration, the business areas going live at one time (some go-lives are phased based on functionality or business area) and the number of users. ▪ There is no limit to the level of support available to a client for go-live, although it is always priced based on the number of days and the level of resource required.
Variations	▪ Additional requirements identified throughout the project can be undertaken on a fixed rate basis determined by resource level. Sometimes a fixed price, fixed scope approach may be agreed subject to specification.
Support Services	▪ Operational Support is provided by RSM post go-live, in addition to the platform support provided by NetSuite, to support our clients' business operations. A fixed monthly rate is charged. RSM can recommend a level of support, and this will provide up to a specified level of first line and a specified level of second line support.

Commercial engagement

The information provided is included only as an indication of the commercial models used. RSM work with all clients to guide them through the design process ensuring that an appropriate structure is adopted for the project.

Ordering and invoice processes

Subject to the selection process, paperwork will be issued for electronic signature including an agreed Statement of Work and associated rates or costs, prior to the commencement of the project.

Typical Payment Terms:

- Fixed Rate / T&M billed in arrears
- Fixed Cost instalments in accordance with an agreed billing schedule. See example below:
 - 40% deposit on order
 - 40% On delivery of build
 - 10% Completion of UAT
 - 10% on Go Live

Expenses (where applicable) are billed in arrears.

Service levels

Technical overview

NetSuite Platform Services Levels

As part of the NetSuite Subscription Services Agreement, NetSuite guarantees a level of functionality, usability, performance and uptime, referring to its obligations to meet the Service Level Commitment as detailed in the terms of service.

NetSuite Terms of Service: <http://www.netsuite.com/portal/resource/terms-of-service.shtml>

NetSuite Service Level Commitment: <http://www.netsuite.com/portal/pdf/netsuite-service-level-commitment.pdf>

Actual System Status: <https://status.netsuite.com/>

RSM support

The following services are typically within the scope of a support agreement:

- Team Enablement: training of the RSM support team in the specific business requirements, implementation process and deployment of the end-solution, enabling solution specific support.
- Case Handling: telephone support, case logging via the customer centre portal and email support. Includes issue escalation within RSM and to NetSuite.
- Case Triage and Severity Assessment
- Issue Resolution: investigation and resolution of issues arising from general use of the NetSuite system
- Issue escalation with RSM from 1st line to 2nd line and to other departments
- Issue escalation to NetSuite
- Collaboration with the NetSuite Support organisation, in the resolution of issues escalated (by RSM – on behalf of the client) to NetSuite, including defects.
- Release Preview: investigation and resolution of issues arising from end-user testing of existing scripting and functionality in the release preview (beta) account
- Post Upgrade: investigation and assistance in the resolution of issues arising from the upgrade for previously tested and functional processes, including liaison with NetSuite where applicable.

“

Our maintenance service assists clients with business-essential customisations. Your NetSuite solution may be integrated with other systems to deliver critical operational functions to your business. We can provide you with proactive maintenance to prevent issues occurring with these essential customisations.

”

RSM maintenance

Proactive and preventative support is available for specified custom solution components, including:

Service	Description	Typical Frequency
Log execution monitoring	Regularly monitor execution logs and assess the impact of any displayed errors. Take action where necessary and raise a case to track any progress.	Daily: Mon – Fri, excluding public holidays
Script / workflow Maintenance	Modifications to scripts and workflows within the scope of this agreement, as a result of changing business procedures, accounting legislation, performance issues, or enhancements in the NetSuite platform.	On demand when required - including off the back of log execution monitoring or a case (incident) being logged
Pre-release Testing	Proactive testing, investigation and resolution of issues arising from RSM testing of existing scripting and functionality (named custom components) in the release preview (beta) account.	Biannual - when pre-release becomes available (typically 90 days prior to upgrade)
Post Upgrade	Investigation and assistance in the resolution of post upgrade issues affecting custom components.	Biannual – post upgrade (typically including 1-week post upgrade)
Documentation	Development [and maintenance] of solution-specific technical documentation on an on-going basis, including documentation of configuration and customisations.	On demand – when required: usually as a result of a configuration amendment
Project Roadmap Planning	Development of a rolling roadmap in conjunction with the Client, detailing enhancements and maintenance to be performed based on priority and business requirements.	On demand – dependent on client requirements

Business continuity

Data back-up and disaster recover

NetSuite SuiteCloud infrastructure

‘Enterprise-class data management, security and availability’

As the world’s largest cloud ERP vendor, run by more than 40,000 customers, NetSuite provides the cloud infrastructure to ensure businesses can run their business management applications in the cloud with complete confidence.

Since 1998, NetSuite has provided comprehensive data privacy, data management, security and availability for running mission-critical ERP, CRM and ecommerce applications. With its multiple data centers, NetSuite provides enterprise-grade infrastructure while delivering proven scale.'

Application security

NetSuite's comprehensive and flexible application security incorporates 256-bit encryption standards, enterprise-grade password policies, role-based field-level security and more.

Operational security

NetSuite’s operational security provides end-to-end controls including intrusion prevention and detection systems, strict security certifications such as PCI-DSS and stringent physical security protocols.

Data management

NetSuite provides multiple levels of data redundancy, world-class disaster recovery and enterprise-level scalability to keep your business running 24/7.

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