



TES Service Description

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2. Confidential Information

This supplementary response is confidential to Total Enterprise Solutions Limited (TES) and the customer.

This document contains information and data that TES considers confidential and proprietary.

- Confidential includes the following:
- Corporate, employee and infrastructure information about TES
- TES service and management and quality processes

Disclosure of the confidential information, or use of it by a third party, will be damaging to TES. Ownership of all confidential information remains with TES. Confidential information in this document shall not be disclosed outside of customer evaluators and shall not be duplicated, used or disclosed for any other purpose than to evaluate this proposal without written permission of an authorised representative of TES.



HM Government
G-Cloud
Supplier



1. Software and licencing

TES are software resellers and specialise in deploying Microsoft software in to Public, Charity and NFP sectors. The core offering is powered around the Microsoft Dynamics 365 Business Central, Customer Relationship Management (CRM), and Power Platform incorporating Power Apps, Power Automate and Power BI.

Microsoft Dynamics 365 Business Central

Connect and grow your business. Grow beyond the limits of your basic accounting software. Dynamics 365 Business Central is an all in one business management solution that's easy to use and adapt, helping your business and make smarter decisions. Manage your financials, automate and secure your supply chain, sell smarter and improve customer service. Also keep projects on time and under budget, optimise your operations and much more. Choose on premise or in the cloud.

Microsoft Azure Hosting

Microsoft Azure is an ever-expanding set of cloud services to help your organisation meet your business challenges. It's the freedom to build, manage and deploy applications on a massive, global network using your favourite tools and frameworks.

Microsoft Dynamics 365 for Sales

Microsoft Dynamics 365 for Sales – Is a CRM system for managing a company's interactions with current and future customers. It uses Microsoft's latest technologies to organize, automate, and synchronize sales, marketing, customer service, and technical support.

Microsoft Dynamics 365 for Marketing

Allows you to build more rewarding business relationships when you create seamless experiences that increase lead generation, strengthen your marketing capabilities, and expand your sales opportunities with Dynamics 365 Marketing.

Microsoft Dynamics 365 Customer Insights

Dynamics 365 Customer Insights helps you build a deeper understanding of your customers. Connect data from various transactional, behavioural, and observational sources to create a 360-degree customer view. Use these insights to drive customer-centric experiences and processes.

Microsoft Dynamics TES NFP Pack

The TES NFP pack contains functionality that is required at NFP organisations. All these organisations require some level of functionality and as such the pack is split down in to two functionality suites, the starter and extended pack.

Microsoft Dynamics TES Purchase Portal

This add-on allows the rollout of the finance system to your organisations budget holders, by using this functionality your budget holders will be able to monitor the spend against their project budget and enter purchase documents for approval workflow against the cost centre / project.

Microsoft Dynamics Power Platform

Microsoft Power Platform is a group of products offered by Microsoft to develop and build complex business solutions, analyse, and draw data visualizations, and automate a business process. All these products offer a platform in which no code is required to build the applications. These products are in the form of simple GUI which can be used by any organisational user or developers, thus helping to reduce the need for IT in the organization, and providing a low code no code function.

- **Power BI**

Make informed, confident business decisions by putting data-driven insights into everyone's hands.

- **Power Apps**

Turn ideas into organisational solutions by enabling everyone to build custom apps that solve business challenges.

- **Power Automate**

Boost business productivity to get more done by giving everyone the ability to automate organisational processes.

2. Professional Services

The TES team have been delivering software projects for over ten years and this experience has taught us that the delivery of the project is just as important as the product itself. The traditional approach of implementing ERP projects suggests that the training should take place on a preconfigured database after the design phase, from 100+ man years TES have developed a hybrid methodology. It combines the best of Prince2 and the Microsoft Sure Step and we include the system training at the start of the process. This enables you to identify process improvement opportunities that you may not have thought about and you can bring these opportunities through in to your system implementation.

Gateway 1. Project Initiation

The first step in a project is the Customer Kick off meeting (CKOM) provides the executive stakeholders, the internal project team, and the customer project team with an overview of the project vision, scope, objectives, key performance indicators (KPIs), and benefits. In addition, the meetings cover the schedule, milestone, resources, roles and responsibilities, and deliverables.

- CKOM – This is the official start of the project where project team members are established, responsibilities are agreed, timelines re-confirmed, resource availability is defined (this takes note of planned annual leave or key business activities e.g. year-end or Budget setting) and implementation approach agreed. From this the Project Initiation Document (PID).
- PID – This encompasses everything that was established/ agreed in the CKOM as well as the agreed project success criteria, the agreed project plan, the risks and issues log. Once this is signed off, then the software installation begins.

Gateway 2. Software installation

During this Gateway we set up the software applications ready for the application configuration phase.

Gateway 3. Key user training

We will be training the key users on how to use Business Central using a standard generic application, to give your users the full understanding of its capability. Training will be classroom-based training hands on 'you do I do', video and textbook based learning.

Gateway 4. Scoping and Gap Analysis

During this Gateway we work through configuration setup questionnaires to get the detailed understanding of the scope and needs of the configuration. We also explore the 'Gaps' identified during the sales process.

- GAP analysis – This is where we drill into the flagged 'development' requirements listed in the detailed pricing.
- Data Transformation Analysis – This activity explores the data migration route from Exchequer to Business Central, understanding the volume, quality and consistency and whether data cleansing/ transformation needs to take place before uploading to the new finance system. We can provide data migration templates.

Gateway 5. Project Consultancy & Milestones

This is the configuration phase of the application, where each area of the application is broken up into separate milestones. This provides an additional level of quality assurance as we cannot progress to the next Milestone until the previous has been signed-off by you.

Gateway 6. Add-ons Training

We will train the key users on the ISV add-ons, to give them full understanding of their capability.

Gateway 7. System walkthrough / Deployment

This is a customer led process, to ensure that the application processes/ workflows follow the correct path and are complete. At this point we introduce our transition and support team as well as your assigned Account Manager.

- Full System walkthrough – It's important to focus on completeness of processes, this is involves

following each workflow from start to finish e.g. order to cash workflow.

- UAT - UAT scripts are defined together, however we do provide UAT script templates

Gateway 8. Go-live

Once the UAT and Full system walkthrough are complete and signed-off then the system is ready to go-live. We will establish a cut-over plan at the point of the system going-live on the 1st November.

- Support consultancy – We provide additional support in case there are any hiccups from users as they switch to a new finance system.

Post go-live we then conduct a project review session to understand what went well, what needs improve and identify key lessons learnt. This helps us to continue improve and refine our project delivery. Once this is complete our transition team will work with you to transition to our support desk and Account Management.

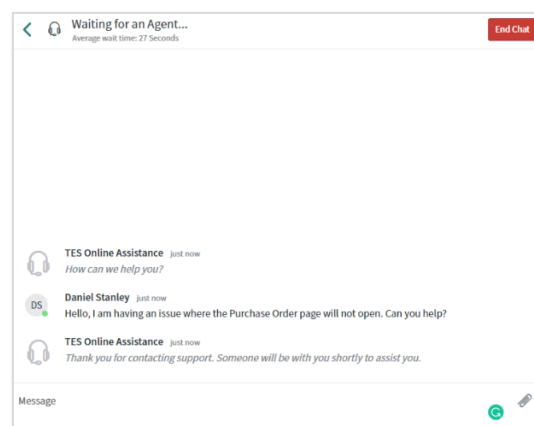
3 Service Management

TES' commitment to delivering truly world class services to its customers is seen through the investment TES has made in Support and Managed Services.

TES support processes are aligned with ITIL, a set of best practice processes for delivering IT services, and together with TES Customer Support Managers (CSMs), they are the foundations of the client relationship and contract management processes that will be provided to the customer in support of measuring, monitoring and improving TES service delivery.

Service is managed through the ServiceNow platform, experienced TES colleagues, core services packages and value added Managed Service bundles:

- A dedicated in-house support team on hand to help resolve queries from the customer's team
- The customer's users are able to access the support team via email, telephone or Live Chat
- The customer's users will be enrolled with the TES ServiceNow portal which will provide a dedicated access point for the management of all service tickets, tracking of response times and escalations
- Full transparency and access to all previous service tickets and their respective resolutions



Core service packages

Break-fix support

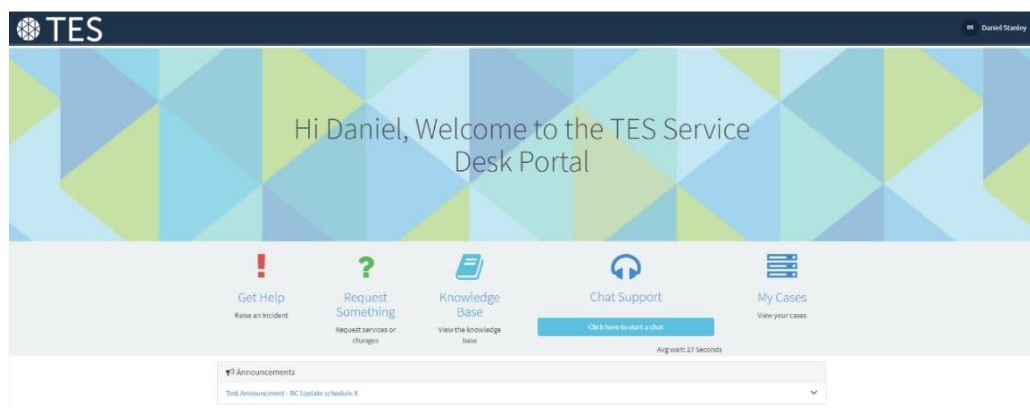
This service will provide support to the customer in the event of a service interruption or loss of service on Supported Products.

The scope of the service includes:

- Incident logging, prioritisation and categorisation
- Incident investigation, troubleshooting and diagnostics

- Incident restoration or work around
- Unlimited support cases – no cap

The service portal will provide access to log support cases and the associated response SLA timeframe. TES have created a supporting ‘knowledge base’ function – this pulls together frequently asked questions from all TES customers, for expedience this allows users to easily search for answers without having to speak to one of the TES analysts.



Within the ‘knowledge base’ additional free learning material including documentation, videos and tutorials can be accessed at anytime by users. This is regularly updated to include new features and functions in D365, and provides useful learning material for new starters.



Query resolution

TES provide the following SLAs as standard.

Priority	Response	Resolution
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1	0.5 hours	4 hours
2	2 hours	8 hours
3	8 hours	3 days
4	16 hours	5 days

Standard support hours are 9am to 5.30pm every weekday, excluding bank holidays. However, TES can provide additional support outside of these hours where required on a pre-agreed basis with the customer.



Priority Categorisation

Customer Impact	Critical Service Work Around / No workaround	Non-Critical Service Work Around / No workaround
All Users	P1 / P2	P2 / P3
Group of Users	P1 / P2	P3 / P3
Single User	P3 / P4	P4 / P4

Change Request Service

The Change Request service will support the customer with the ability to request a change to their supported product. This may include an enhancement, resolving a bug or defect, or implementing a change to the code to meet legislation or applicable standards amendments. The customer has the ability to raise unlimited Change Requests however a resultant development charge maybe required if over 0.25/days effort, in this instance a quote will be provided to the customer for approval.

For each change raised TES will detail:

- A clear scope of the change
- Quote if applicable for the change
- Development of the change
- Unit and Functional Testing
- Deployment into a test environment
- Deployment into production

Service Request Fulfilment

TES are able to support several service request types through the ServiceNow Portal, including:

- Ability to raise a 'How To' query
- Access requests
- Product Password Reset
- Request new, amendment or leaver account
- Product Health Check

Service Requests may hold an additional charge depending on the nature of request.

Problem Management Service

The Problem Management Service provides the customer with proactive management of the Supported Products and can be used by the customer in the following scenarios:

- Major Incident - Following a major Incident if a workaround is provided to restore service but the root cause of the Incident is unknown, a Problem will be created to identify the root cause
- Bug or defect Reporting - If a bug or defect is reported and has a workaround or is a known error, a Problem will be created to identify the permanent fix

- Patterns & Trend Analysis – If, during service reviews or incident management, patterns or trends are identified, a Problem will be created to investigate the reason for the trends / pattern

Upgrade Assurance

Monthly updates and bi-annual upgrades are included as part the service implementation. TES believe that a proactive approach to supporting customers through the Microsoft Spring and Autumn upgrades is required to ensure that they have minimal business disruption to the business operation and service delivery.

Often overlooked by other suppliers, TES provide an Upgrade Assurance service where, as part of an on-going support service, full system and upgrade testing is performed to ensure there are no negative impacts to the customer's system, and that all configuration, customisations and integrations continue to work as expected. TES will also provide free webinars to the customer to provide information about latest updates, new functionality, and any known impacts as part of regular "What's New?" training. The Upgrade Assurance service minimises the amount of user down time and will provide the customer with the assurance that there will be no disruption to the day-to-day use of the system once updated.

Included Services:

- ✓ All Major Updates
- ✓ All Minor Updates
- ✓ Notifications
- ✓ Proactive Scheduling
- ✓ Testing Service
- ✓ Customisations
- ✓ Integrations
- ✓ TES Extensions
- ✓ Extension Notifications
- ✓ "What's New?" training



TES Managed Service Bundles

TES recognises that not all customers have a dedicated in-house support team, therefore it also offers additional Managed Services bundles to supplement the standard Support offerings outlined above. These bundles offer a tailored support package to suit your requirements, typical pricing is shown this would be updated based on the final terms of the contract and scope of service to be delivered:

Security - £x / annum based on organisation size/ users

- Security Role Reviews
- Role additions, amendments and removals

Maintenance - £x / annum based on complexity of solution

- Job Queue & Workflow Maintenance
- Back Up Scheduling
- Web Service Setup
- Monthly Health Check

Advisory - £x / annum based on customer needs

- Business Process Reviews
- Best Practice Advice & Monthly Advisory

Audit Health Check - £x / annum based on service complexity

- Quarterly Role Compliance
- Quarterly Utilisation Check

- License Compliance

Training – £x / annum based size of organisation/ number of users

- Training articles
- Monthly Webinars
- Ask the trainer forum
- Targeted training sessions (TBC)

Reporting – £x / annum based on customer requirements

- Dashboard Configuration & setup
- Management Reporting (TBC)

Customer Success Team

A key part of the TES post go-live service is the Customer Success Team. TES provide a dedicated Customer Success Manager (CSM) who are assigned at the onset of the project, remaining as the go-to contact point once the service has been implemented. TES' CSMs work with the customer to ensure that they continually gain maximum value from the implemented service. They achieve this through regular meetings, either on a monthly or quarterly basis.

The TES CSM works with the customer to develop a system roadmap, detailing upcoming and planned feature enhancements, and providing updates of the latest Microsoft upgrades. Working in tandem with the TES Managed Services Team, the CSM will also help identify any functional areas where users could benefit from additional training or coaching. For example, if a user or group of users were repeatedly asking 'how to add a new contact' then TES would flag this to the system administrator and point to Knowledge Based Articles they could consume or suggest possible 1-1 coaching sessions.

Complaints Handling and Resolution

TES have a standard approach to complaints handling and resolution, timings of the process are agreed as part of the service implementation.

- The customer or TES will notify the other party of any complaints made by customers end users which have not been resolved within X Working Days
- TES will provide full details of its plans to resolve the complaint within X Working Days
- TES will work with the customer to resolve the complaint within X Working Days
- Upon issue resolution TES will provide full details of the complaint, including details of the steps taken to resolve it, and any identified ongoing service improvement measures for the prevention of future issues for acceptance by the customer within X Working Days

Managing Disputes

TES have a standard approach to Managing Disputes, timings of the process will be agreed with the customer as part of the service implementation.

- When the customer or TES notifies the other of a dispute, both Parties will attempt in good faith to negotiate a settlement within X Working Days. This will include escalation of the dispute to organisational Heads of Business, for TES this will be the Chief Executive Officer, for the customer this will be xxxxxxxxx
- The obligations of TES to provide services to the customer will not be suspended, ceased or delayed by the reference of a dispute to mediation or arbitration and TES will continue to comply with the requirements of the customer contract
- If the dispute cannot be resolved, the customer and TES will first attempt to settle the matter by mediation before either Party commences formal action.