RSM MANAGED SERVICES AND SUPPORT FOR MICROSOFT DYNAMICS GP

February 13, 2019
Agenda

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Introduction

Patty Taylor, Director

• 15 years with RSM
• Regional Practice Lead for Dynamics GP
• 20+ years experience with Dynamics GP
Managed Services Overview

• RSM provides a comprehensive managed services framework with strategic advisors and experienced technology professionals, providing peace of mind at a predictable cost.

• Our teams can provide managed services for infrastructure, managed services for Office 365, and managed application services and support.
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<tr>
<th>Managed Services &amp; Support for Microsoft Dynamics GP</th>
<th>Tier I</th>
<th>Tier II</th>
<th>Tier III</th>
<th>Tier IV</th>
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<tr>
<td>Access to live onshore response team 24/7</td>
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<td>Dynamics GP Help Desk 8am – 8pm ET M-F</td>
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<td>Access to experienced Microsoft Dynamics Professionals</td>
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<td>Extensive knowledge and experience with third-party products</td>
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<td>Support provided on an hourly basis</td>
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<td>Support provided on a fixed fee basis</td>
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<td>Dedicated Account Management</td>
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<td>Microsoft Dynamics Rapid Assessment</td>
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<td>Biennial Dynamics GP upgrade</td>
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<td>System monitoring and alerts – GP only</td>
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<td>System monitoring and alerts across all IT Systems</td>
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Managed Services & Support for Microsoft Dynamics GP

Tier I
- Access to live onshore response team 24/7
- Dynamics GP Help Desk 8am – 8pm ET M-F
- Access to experienced Microsoft Dynamics Professionals
- Support provided on an hourly basis

Tier II
- Unlimited technical support incidents (Fixed Fee)
- Dedicated Account Management

Tier III
- Annual Dynamics Rapid Assessment
- Biennial upgrade of Dynamics GP (every 2 years)
- System monitoring and alerts for Dynamics GP

Tier IV
- Full Managed IT Services across all IT systems
Managed Cloud Services for Dynamics GP

• Management, monitoring and support of your Dynamics GP systems on:
  – RSM Compliant Cloud
  – Microsoft Azure
Managed Cloud Services for Dynamics GP

RSM cloud solutions advantages

- Audit, tax, and consulting services focused on understanding our clients
- 1,000+ U.S.-based technology consultants
- Choose your cloud (public/private/hybrid)
- Application and infrastructure support/escalation in one company
- Service level agreements backed by financial credits
- Security-focused methodology
- Microsoft Dynamics certified professionals
- 20+ Industries including pharma, nonprofit, government, retail, food/beverage

- Dedicated virtual servers no multitenancy
- 24/7 U.S.-based support NOC
- AICPA SOC 2 Type 1
- Integration with Microsoft Azure AD and Office 365
- Multifactor authentication capabilities
- Flexibility in cloud design

Empowering clients to make confident decisions.
National Dynamics GP Support Team

Nancy Hogan – Manager

- 6 years with RSM
- 20 years consulting and supporting Microsoft Dynamics GP and related third party products
- Dynamics Credentialed Professional Core Financials
- Areas of focus and expertise - Financials, Distribution, & Payroll/HR
- Previous experience in banking, premium finance insurance, public accounting, & computer services
Kelly Gray – Senior Support Specialist

• 25 years of experience supporting Dynamics GP and related third-party applications

• Areas of focus and expertise include core financials, distribution and payroll/HR

• Previous industry focus includes business software solutions and customer service
Dave Funk – Senior Support Specialist

- 20 years consulting and supporting Dynamics GP
- Dynamics Credentialed Professional Core Financials
- Areas of focus and expertise include Payroll/HR, and SQL Scripting
- Previous experience in government accounting, staffing, and healthcare
Barb Schroth – Senior Support Specialist

- 19 years consulting and supporting Microsoft Dynamics GP
- Dynamics Credentialed Professional Core Financials
- Public accounting auditor for 15 years for telephone, electric and manufacturing industries
- Areas of focus and expertise include payroll, financial and reporting
- Certified public accountant, state of Minnesota
Gina Lehmann– Associate Support Specialist

- 5 years working with Microsoft Dynamics GP
- Areas of focus and expertise – Dynamics GP Core Financials
- 30 years prior experience in Finance/Accounting in the Hospitality Industry
BETH RILEY – SENIOR SUPPORT SPECIALIST

- 28 years consulting and supporting Microsoft Dynamics GP
- Areas of focus and expertise – Dynamics GP Core Financials, Distributions Series, & Payroll/HR
Dynamics GP Help Desk – Methods of contact

• Email: gpsupport@rsmus.com

• Toll-free support phone number: +1 888 678 5536

• Online support case submission and tracking at https://rsmconnect.rsmus.com/support?company=McGladrey
Dynamics GP Help Desk – Hours of operation

• Monday – Friday, 8:00 a.m. to 8:00 p.m. ET
• Closed national holidays and day after Thanksgiving
Dynamics GP Help Desk – Escalation procedures

• Use case priority system
  - External via the client portal
    • When cases are submitted via the client portal, they are automatically set to a priority of medium when they hit the queue, unless otherwise noted in your case submission by marking the emergency checkbox in the case creation window.
    • Once the ticket is created in our system, we have additional priorities available internally that we use to determine the order cases are worked on in the queue.
  - Internal priority assignments
    • Low – The case is related to a usability issue, cosmetic, or nice to have.
    • Medium – This is the default for all cases created either on the customer portal, email, or call in. Medium priority indicates the issue is causing problems with your business processes, but you are still able to conduct business and get daily operations completed.
    • High – The case is causing serious problems with your business processes and significant pain to your employees, vendors or customers.
    • Escalated – The case is a mission-critical, systems down case. A major function of your business cannot be completed.
  - Other options
    • Ability to respond back to the support analyst that is assigned to the case.
    • Ability to call the main support line.
    • Ability to email the support team with your change request.
    • Ability to contact our management team.

• If you ever feel that you are not receiving satisfactory support service or would like to manually escalate a case, please contact Nancy Hogan (manager) at +1 443 992 6102 or nancy.hogan@rsmus.com.
Dynamics GP Help Desk – Help us help you

- What is the exact error message?
- What window are you in?
- What troubleshooting steps have you taken so far?
- Have you been able to complete the task prior to contacting us? If so, what has changed?
- Do you have similar problems in other modules? If so, please explain.
- Have you had a history of similar problems? If so, please explain.
- Does the error occur when logged in as the system administrator?
- Do other users receive the same error message?
- Do you receive the same error message in another company?
• Do other workstations receive the same error message?
• Does the error occur consistently? Are you able to reproduce the error?
• Has the window or report been modified? If yes, does the non-modified window or report receive the error?
• Do you have any additional third-party products or customizations loaded? If so, please list them.
• What version of software are you running?
• What type of workstation are you running?
• Are you able to restore from a backup?
• Have you run file maintenance on the affected modules?
• Have you made any recent changes to your workstation(s) or network environment?
Information to provide when contacting the support desk

- Your complete contact information
- Details about the issue
  - Provide replication steps including a description of the steps performed or processes run. This should include specific menu navigation, fields entered and actions taken such as buttons pressed, menu options and error messages. Annotated screen captures are the most effective way to communicate this information.

- Examples
  - Any detailed examples of the issue which could include reports, inconsistent data or order numbers.

- Technical details
  - Log and trace files.
  - Provide event viewer information with screen shots.
QUESTIONS AND ANSWERS?